exotel DOCS

Intelligent Chatbot

1. Chatbot

1.1. Getting Started: Signing Up and Sharing Your Bot

Welcome to the Exo-Chatbot platform!

This guide will walk you through the first essential steps: creating your account and sharing access with your team.

Whether you are a new client signing up for the first time or an administrator setting up a bot for your team, this document has you covered.

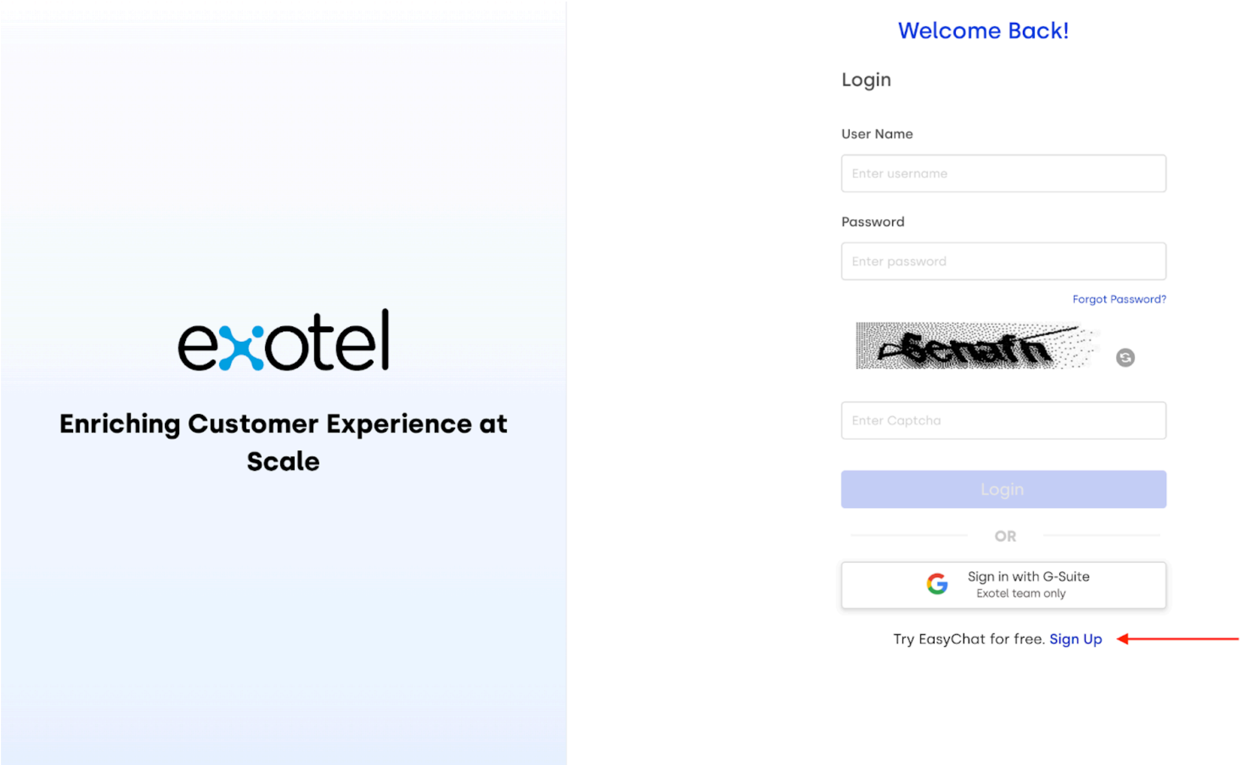
Let's get you set up.

Part 1: For New Users - Creating Your Account

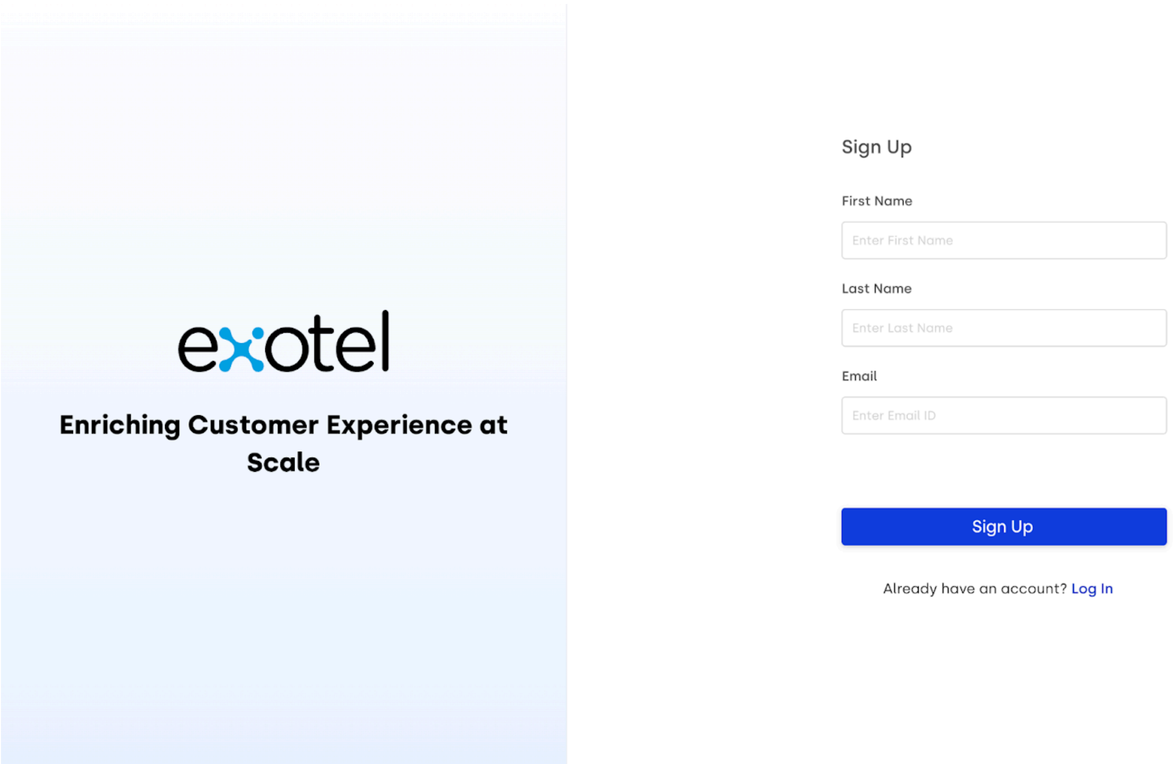
If you are a new client or an external collaborator, you can create your own account through our self-signup portal.

Step-by-Step Guide:

Go to the Signup Page: Open your web browser and navigate to https://bots.exotel.com/bot/chat/login/.



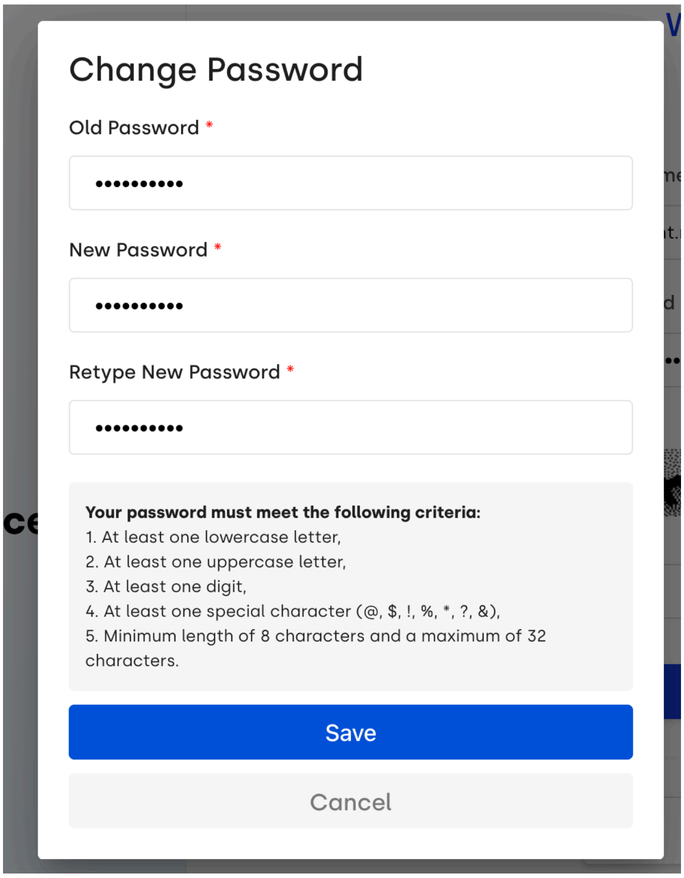
Fill Out Your Details



Check Your Email: After submitting, you will receive an email from us containing your login details and a link to set your password.

Create a Secure Password: Follow the link in the email. You will be asked to create a password that meets our security standards:

1. Must be between 8 and 32 characters long.
2. Must contain at least **one lowercase letter** (a-z).
3. Must contain at least **one uppercase letter** (A-Z).
4. Must contain at least **one number** (0-9).



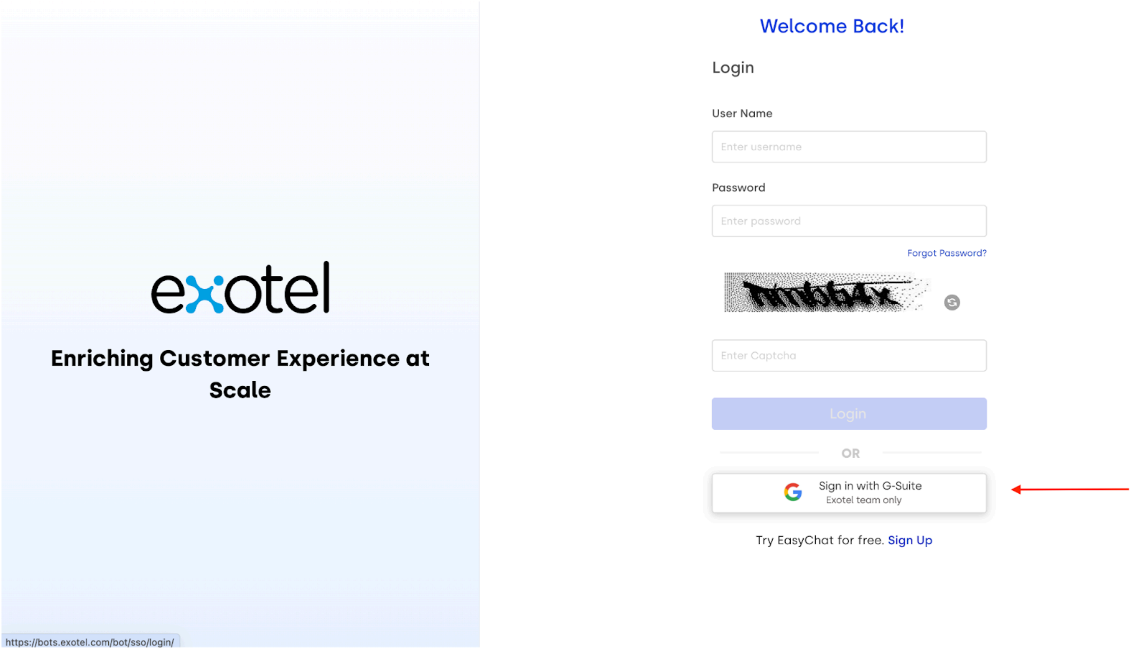
Once your password is set, you are ready to log in!

Part 2: For Administrators - Creating and Sharing a Bot

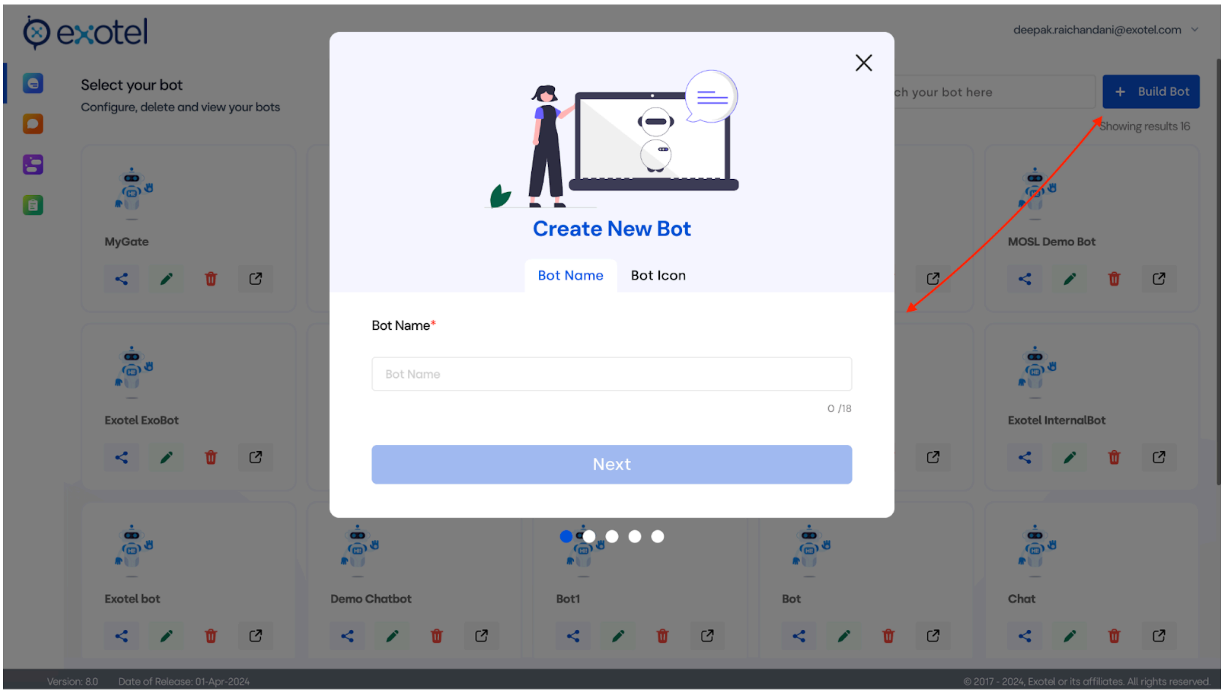
This section is for Exotel employees or users with **Super Admin** privileges who need to create a new chatbot and invite others to collaborate.

Step-by-Step Guide:

1. **Log In and Create the Bot**:



- From the main dashboard, click the **"Build Bot"** button to begin.

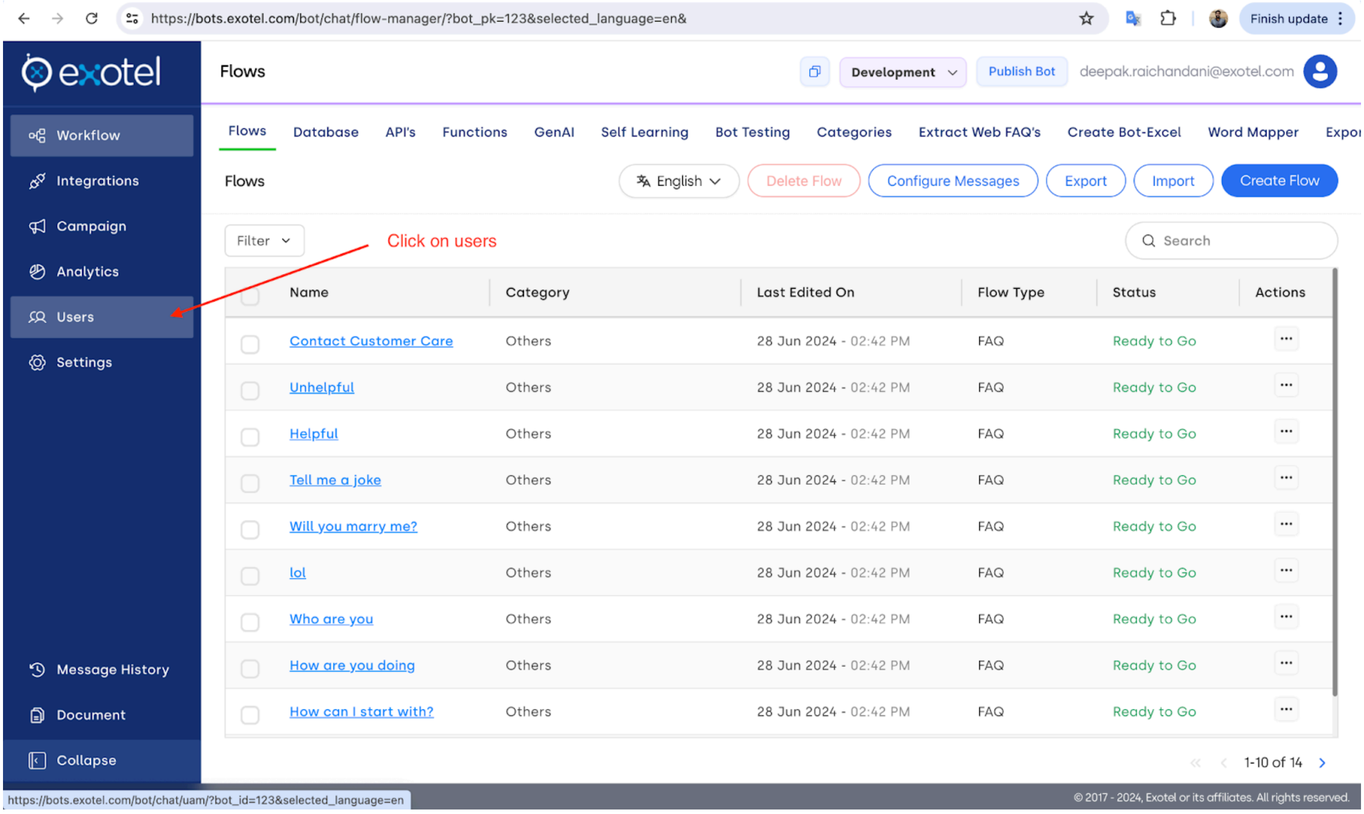


- Provide the basic details for your new bot. As the creator, you will automatically be assigned the **Super Admin** role for this bot.

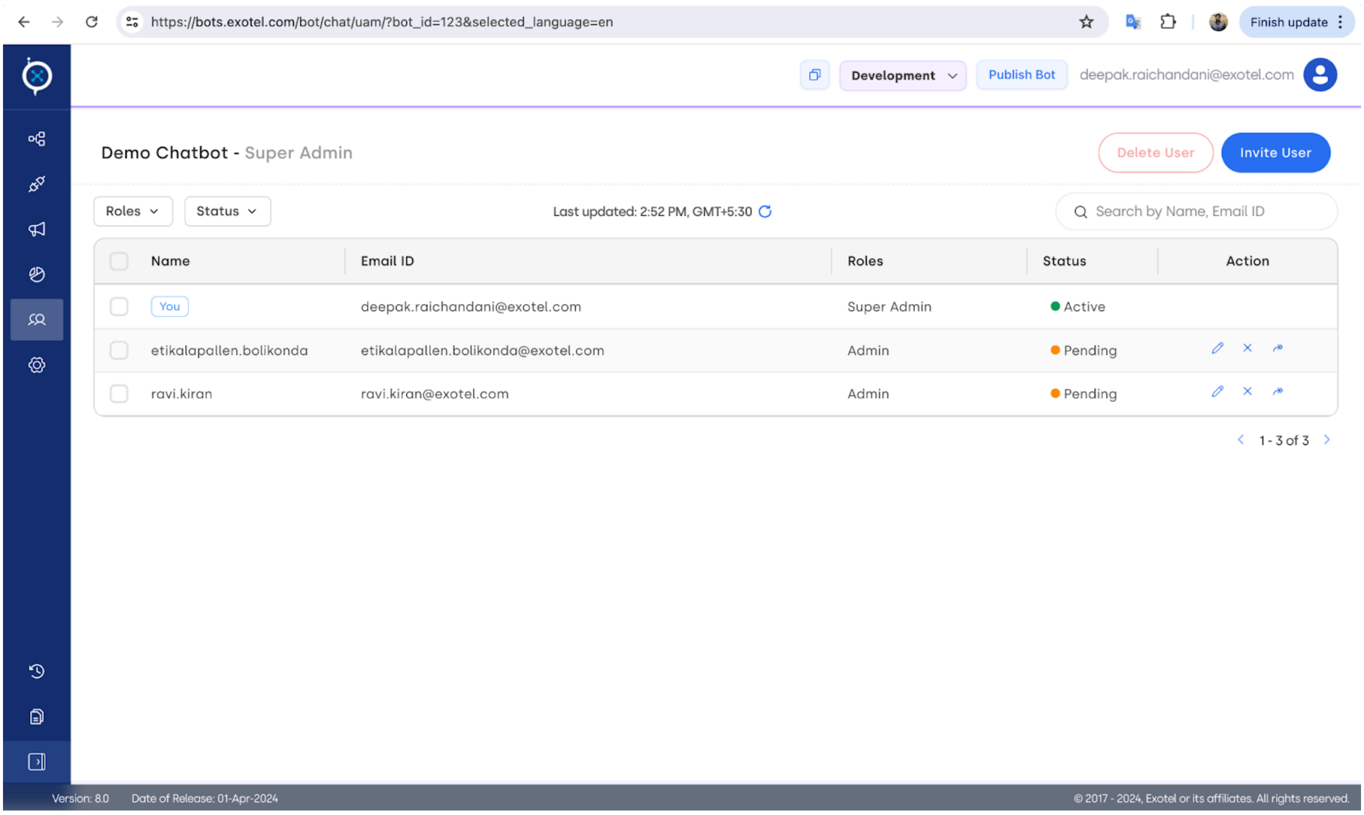
Invite Your Team:

Important: Select the correct **Access Role**. For clients and external collaborators, always choose the **Admin** role. The Super Admin role should be reserved for internal staff who need publishing rights.

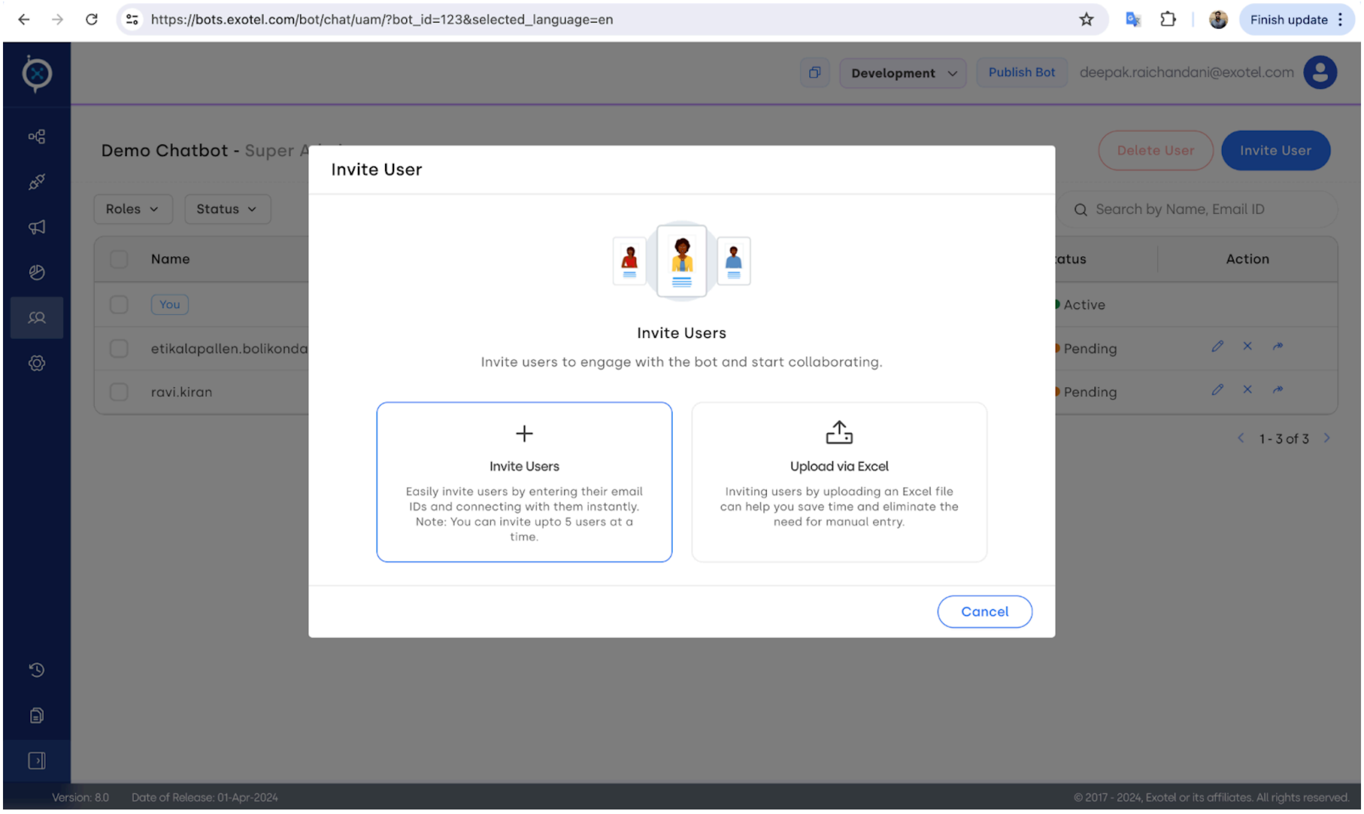
Open the bot you just created and navigate to the **Users** section from the side menu.



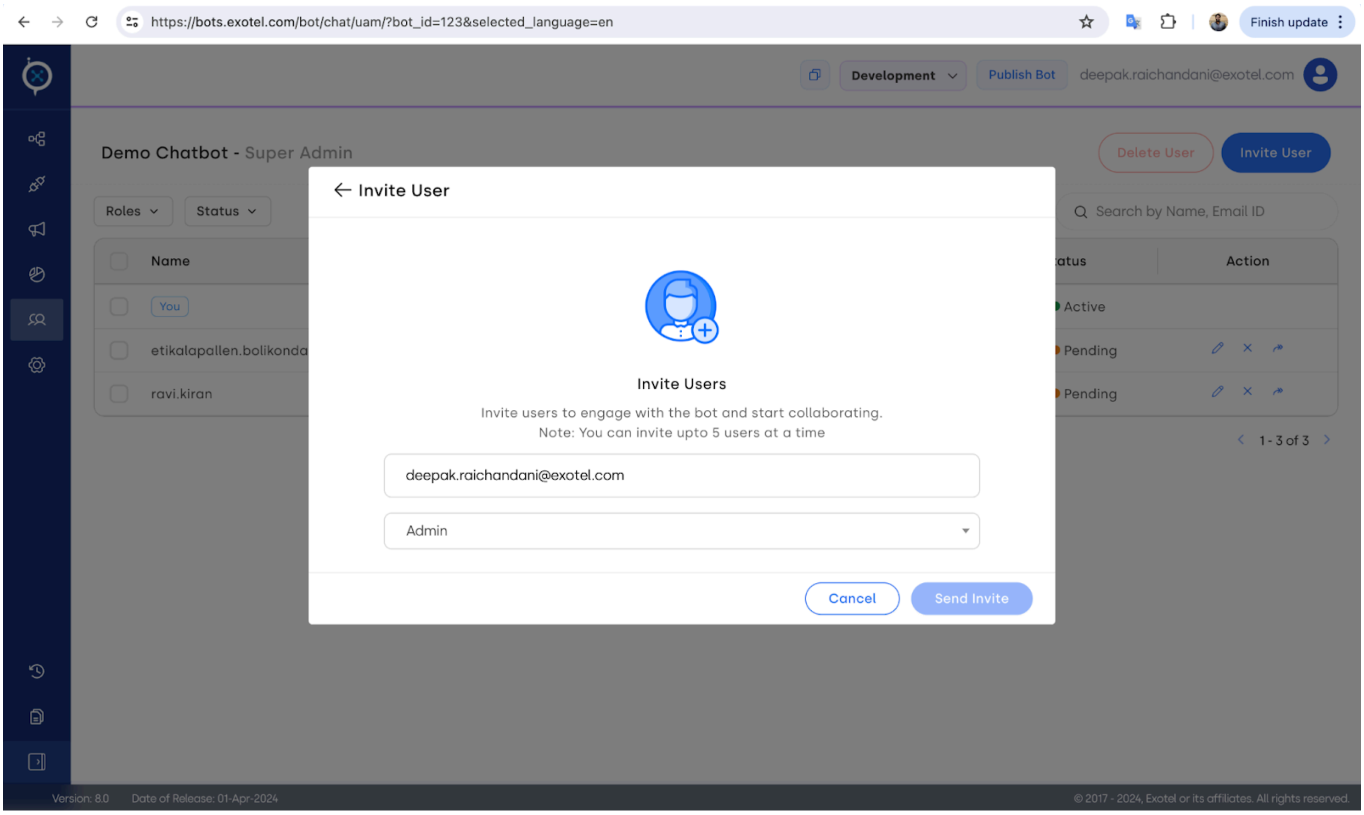
Click the **Invite Users** button.



Select the **Invite Users** option.



Enter the email address of the person you want to add.



Important: Select the correct **Access Role**. For clients and external collaborators, always choose the **Admin** role. The Super Admin role should be reserved for internal staff who need publishing rights.

What Happens Next:

The user you invited will receive an email. They will need to accept the invitation and set up their password to access the bot.

Once they log in, they will have the permissions associated with the role you assigned them.

Understanding User Roles

Super Admin: This role has full control over the bot, including the critical ability to **publish** changes to the live environment. This role is typically for internal Exotel employees or project leads.

Admin: This role can do almost everything a Super Admin can, including building and editing conversational flows. However, an Admin **cannot** publish the bot. Any changes they make must be reviewed and published by a Super Admin.

Best Practices for a Smooth Start

Verify Emails Before Inviting: Double-check that you have the correct email address before sending an invitation to avoid security risks.

Assign Roles Carefully: Always grant the minimum necessary permissions. For most collaborators, the "Admin" role is sufficient and safer.

Communicate with Your Team: After sending an invite, let the person know to expect an email so they can get set up quickly.

1.2. Building Your Bot

The core features for designing, building, and training your bot's logic.

Workflow - Includes the following:

Flow Builder (v8)

Database

API Library

Function Writer

Category

Create Bot With Excel

Word Mapper

Bot Testing

ExoMind - Exo Insights

1.2.1. Workflow

Overview

The **Flows** page is the central dashboard and command center within the **Workflow** module of the Exo-Chatbot platform. It serves as the primary interface for managing all the individual conversational paths, or "flows," that make up your chatbot's intelligence. A flow can be anything from a simple, single-answer FAQ to a complex, multi-step user journey.

From this page, you can create new flows, edit existing ones, organize them into categories, and get a high-level view of their status. The page is designed to give you a complete picture of your bot's conversational architecture and provide all the tools needed for its management.

The page features a main table listing all your flows and is surrounded by a suite of powerful tools accessible via buttons and tabs, including the **Flow Builder**, **Database management**, **API integration**, and more.

How to Use Workflow

This guide explains the functionalities available on the Flows page, which acts as the starting point for most bot-building activities.

2.1 Navigating to the Flows Page

1. Log in to the Exo-Chatbot console.
2. On the main navigation menu on the left, click on **Workflow**. You will land on the **Flows** tab by default.

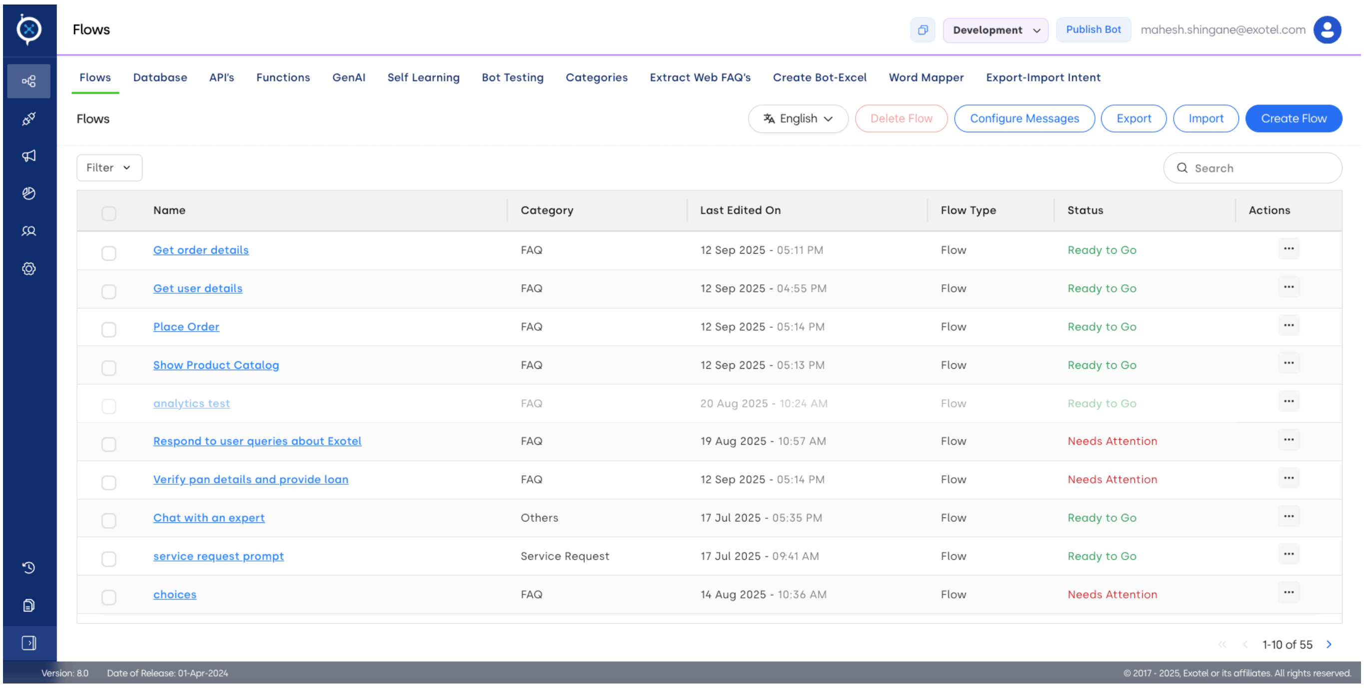
2.2 The Flow Manager Dashboard

The main part of the page is the Flow Manager, which contains the list of all your flows and the tools to manage them.

1. The Flows Table: This table provides an at-a-glance summary of every flow in your bot.

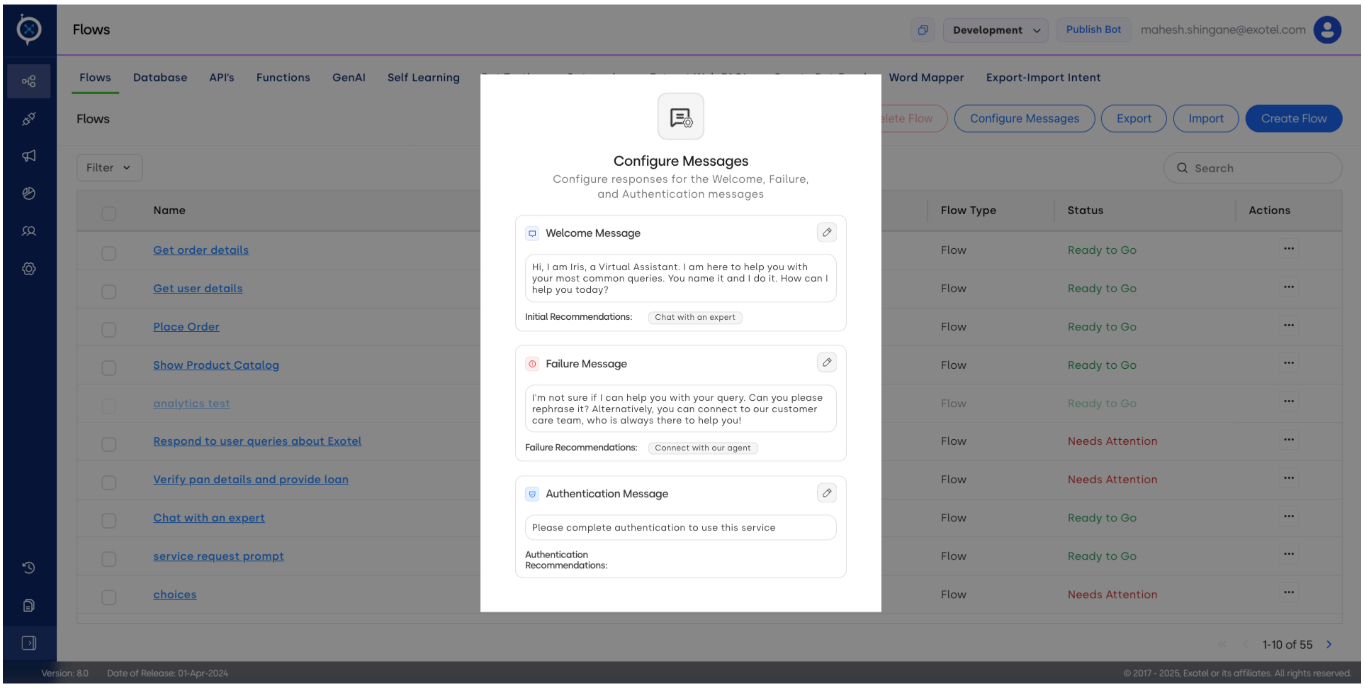
- **Name**: The unique name of the flow, which is often used to trigger it.

- **Category**: The category the flow belongs to (e.g., "FAQ," "Service Request").
- **Last Edited On**: The date and time the flow was last modified.
- **Flow Type**: Specifies how the flow was created (e.g., "Flow," "FAQ").
- **Status**: A critical indicator of the flow's health.
    - **Ready to Go**: The flow is complete and operational.
    - **Needs Attention**: The flow is incomplete or has an error that needs to be fixed.
- **Actions**: A menu (...) with options to **Edit**, **Delete**, or **Duplicate** the flow.



2. Core Actions and Buttons:

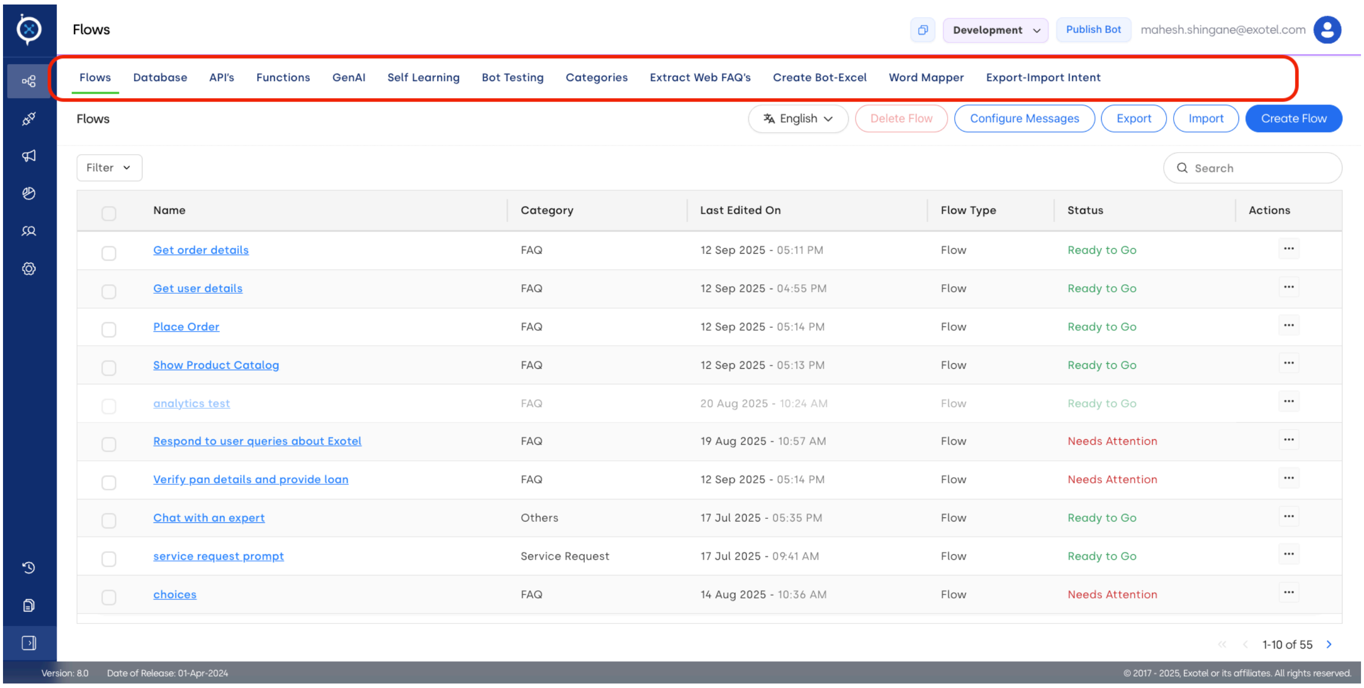
- **Create Flow**: The primary button that launches the **Flow Builder**, where you can design a new conversational journey from scratch.
- **Configure Messages**: Allows you to set the global default messages for the bot, including the initial **Welcome Message** and the **Failure Message** (shown when the bot doesn't understand a query).



- **Filter and Search**: Use the **Filter** dropdown to sort flows by Status or Category, and use the **Search** bar to find a specific flow by name.
- **Import / Export**: These buttons allow you to export your bot's flows for backup or migration, and import them into another bot.
- **Delete Flow**: Allows you to delete one or more selected flows in bulk.

3. Navigating to Other Workflow Tools: The tabs at the top of the page provide direct access to other critical parts of the Workflow module:

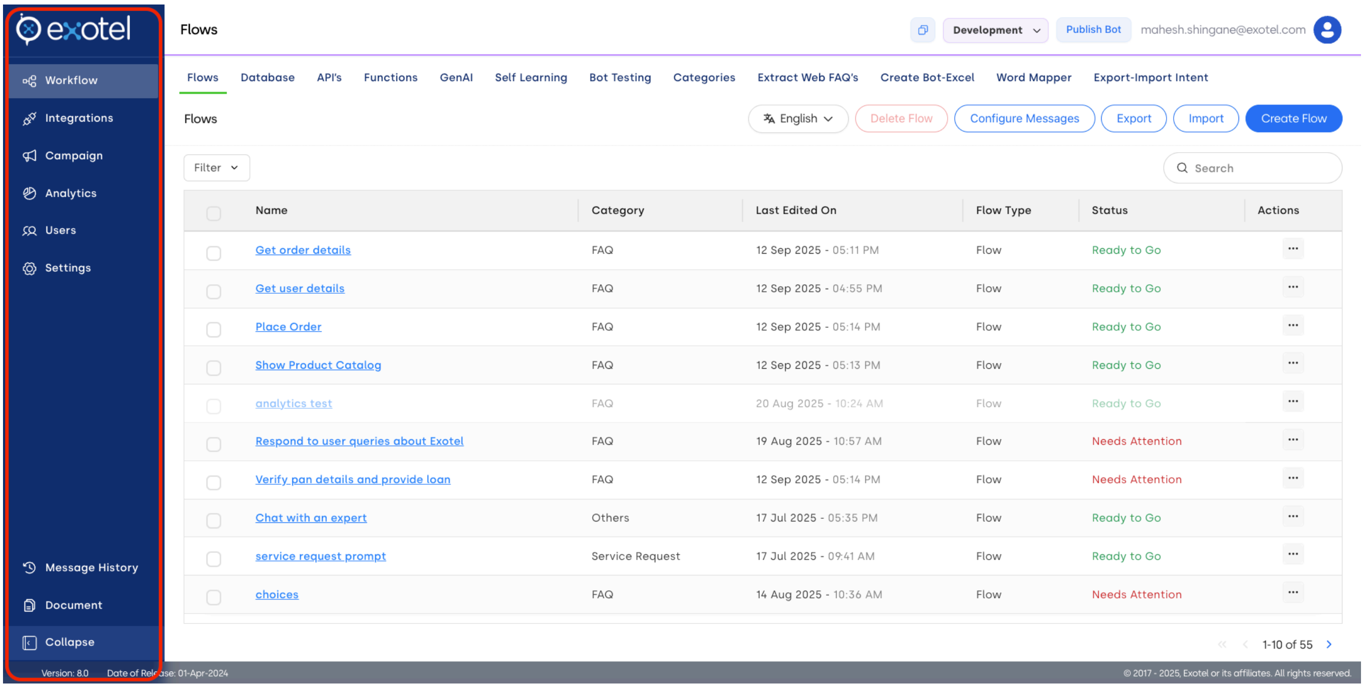
- **Database**: To create and manage tables for storing user data.
- **APIs**: To integrate with external systems.
- **Functions**: To write custom Python code.
- **GenAI / Self Learning / Bot Testing**: For advanced AI capabilities and quality assurance.



2.3 The Main Navigation Panel

The panel on the left side of the screen is your primary navigation hub for the entire platform. Here is a brief overview of each section:

- **Workflow**: Contains all the tools for building your bot's conversational logic, which you are currently viewing.
- **Integrations**: Manage and configure connections to various channels like Web, WhatsApp, and Facebook.
- **Campaign**: Create and manage outbound messaging campaigns.
- **Analytics**: Access detailed reports and dashboards on your bot's performance and user interactions.
- **Users**: Manage user accounts, roles, and permissions for the console.
- **Settings**: Configure global settings for your bot, including its name, security options, and enabling major features.
- **Message History**: View and search detailed conversation logs.
- **Document**: Access API documentation and support guides.
- **Collapse**: Minimize the navigation panel to expand your workspace.



Common Use Cases

- **Finding and Fixing Broken Flows**: A bot builder uses the **Filter** to show only flows with the status "Needs Attention." They can then quickly click the **Edit** button on each one to go into the Flow Builder and resolve the errors.
- **Organizing a New Bot**: As you build a bot, you create different categories like "Sales Queries" and "Support Issues." You then assign each new flow to the appropriate category to keep the list organized.
- **Creating a New Lead Generation Flow**: You would click **+ Create Flow**, which takes you to the Flow Builder to design a conversation that asks for the user's name, email, and phone number.
- **Updating** the **Welcome Message**: To change how the bot greets users, you would click **Configure Messages** and edit the text in the Welcome Message section.

Best Practices

- **Use Clear Naming Conventions**: Give your flows descriptive names (e.g., check_order_status instead of flow_123) so you can easily identify them in the list.
- **Categorize Everything**: As your bot grows, having dozens or hundreds of uncategorized flows becomes unmanageable. Use categories from the beginning.
- **Regularly Monitor Flow Status**: Periodically check the Flows page for any flows that "Need Attention" and fix them promptly to ensure a good user experience.

- **Use the "Duplicate" Action for Templates**: If you need to create several similar flows, build one complete flow and then use the **Duplicate** action to create copies that you can modify slightly.

Common Mistakes

- **Ignoring "Needs Attention" Status**: Letting flows with errors remain broken, which leads to dead ends and user frustration.
- **Not Using Categories**: Having a single, long, uncategorized list of flows makes it very difficult to find and manage specific conversations as the bot scales.
- **Poor Naming**: Using vague or temporary names for flows, making it hard for you or your teammates to understand what each flow does later on.

1.2.1.1. Flow Builder (v7)

Manage intents

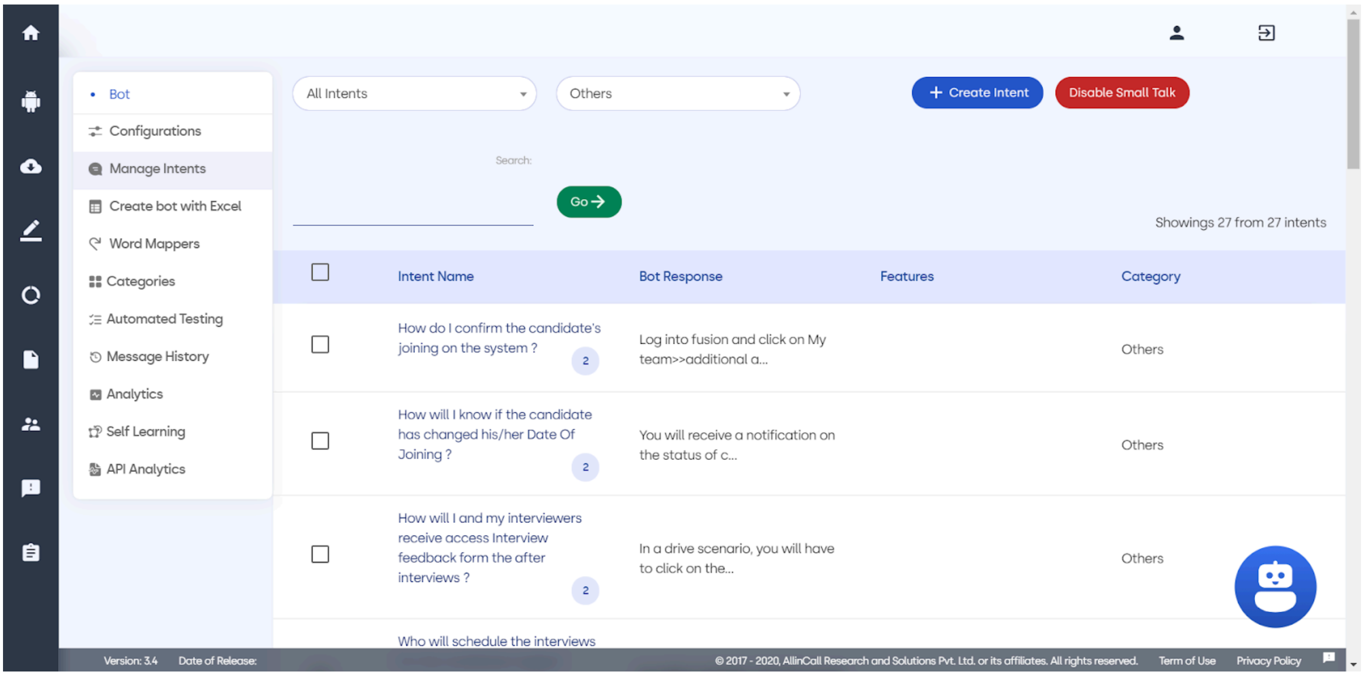
Feature Name	Definition
Manage Intents	A list of all intents in the ChatBot are displayed on this page. Admin can also search for intents based on their categories. New Intents can be added in the ChatBot by clicking on the “Create Intent” buttonFine tuning - This can be fine tuned.
Intent Category	We can assign an intent to a particular category to club together similar intents.
Training questions	We can add training questions for the specific intent for the best possible match using **ChatGPT**
Bot response	Edit the bot response for the specific intent. Can also add images, pdfs, tables, videos and link cards in the bot response. This can be fine tuned.
Response widgets	Admin can directly add the following widgets in bot responses: • Calendar Picker This widget will ask for date and/or time inputs from the user in the bot response. • Radio Button This widget will allow user to select an option from a list of options • Check Box This widget will allow user to select multiple options from a list of options • Drop Down This widget will allow user to select an option from a drop down • Video Recorder • This widget will allow users to record a video and send it as a response to the bot • Range Slider This widget will allow user to provide an input within a defined range • File Attach

Feature Name	Definition
	This widget will allow users to attach several files such as documents (.pdf, .doc), images (.png, .jpeg, .jpg), compressed file (.zip), video file (.mp4) • Create Form This widget will allow users to fill a form created by admin. Integrate API dynamically. • Phone Number This widget will allow users to fill in Phone number. Integrate API dynamically.
Channel	We can use the same intents in multiple channels
Quick recommendations	This functionality can be used when you want to display intent post bot response of invoking any intent. Quick recommendations can be shown either in a menu format or in a button format.
WhatsApp Menu Format	Add menu for WhatsApp bot
Campaign Links	The admin can create a campaign link for a particular intent which can then be used for promoting certain web pages by making the users land on the specified web page and triggering the selected intent.
Manage Intent Filter	Users will be able to filter by channels/ type/ category of intent.

The admin can modify the content inside the bot. The admin can create new intents, edit intents to add/change/delete user journeys.

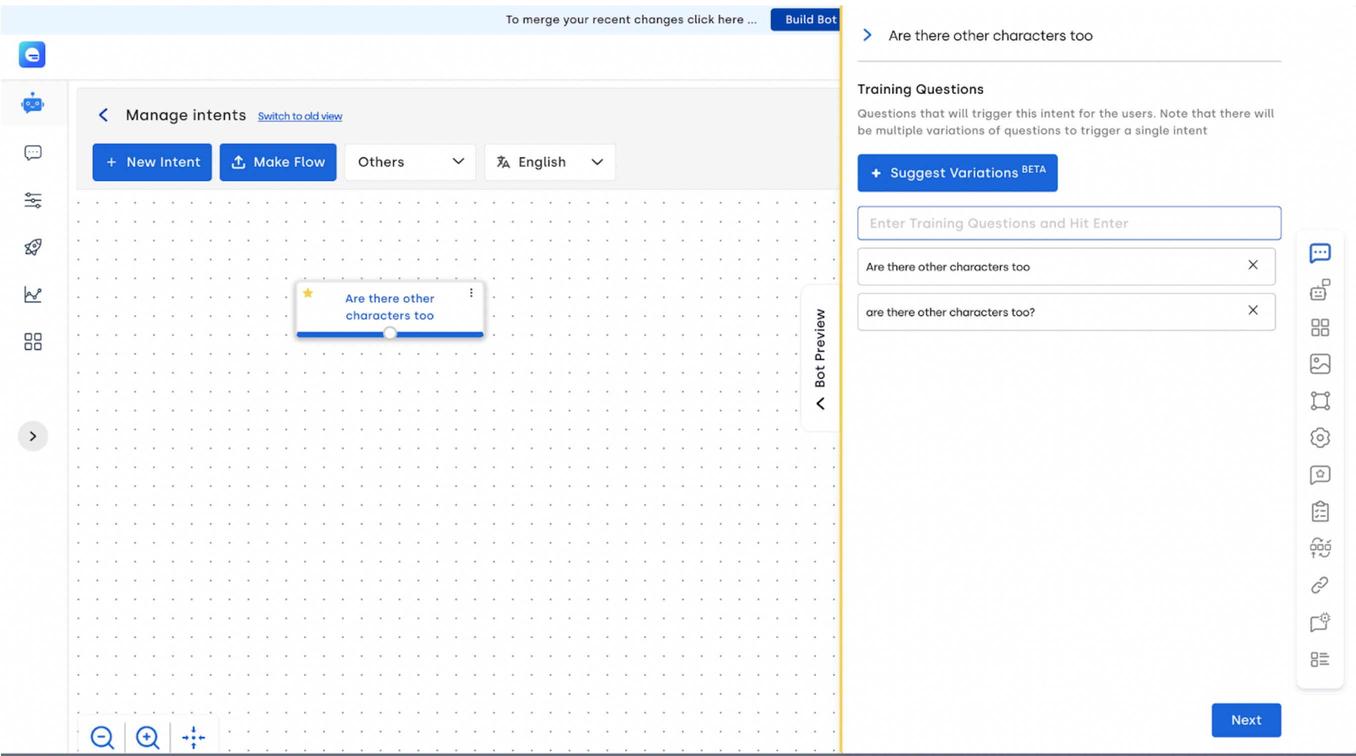
- Manage Intents page

A list of all intents in the ChatBot is displayed on this page. Some small talk intents such as “Hey”, “How are you”, “Thank you” and more are readily available in this list and can be enabled or disabled as per business requirements. Admin can also search for intents based on their categories.

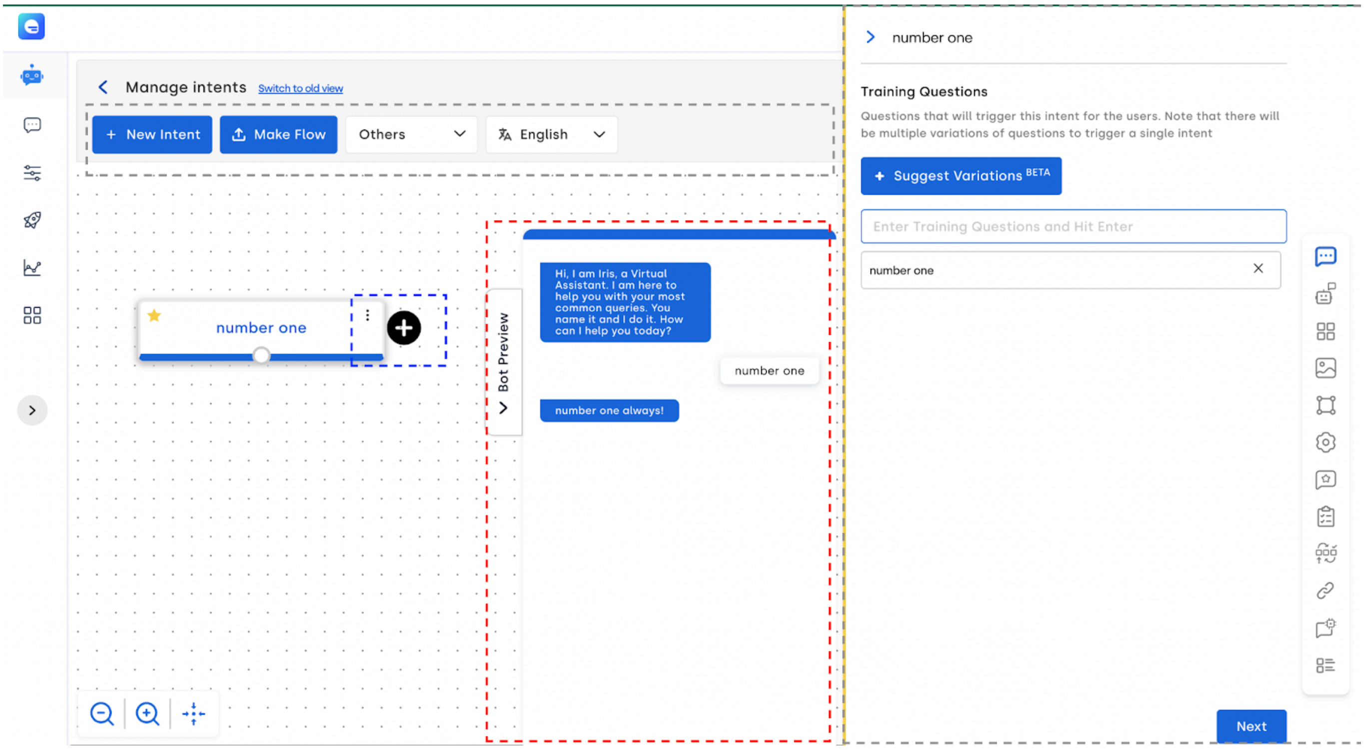


Creating intent The Edit intent page along with all the configurations for an intent is the most used part of our product. The page has been revamped with enhanced UI and UX features.

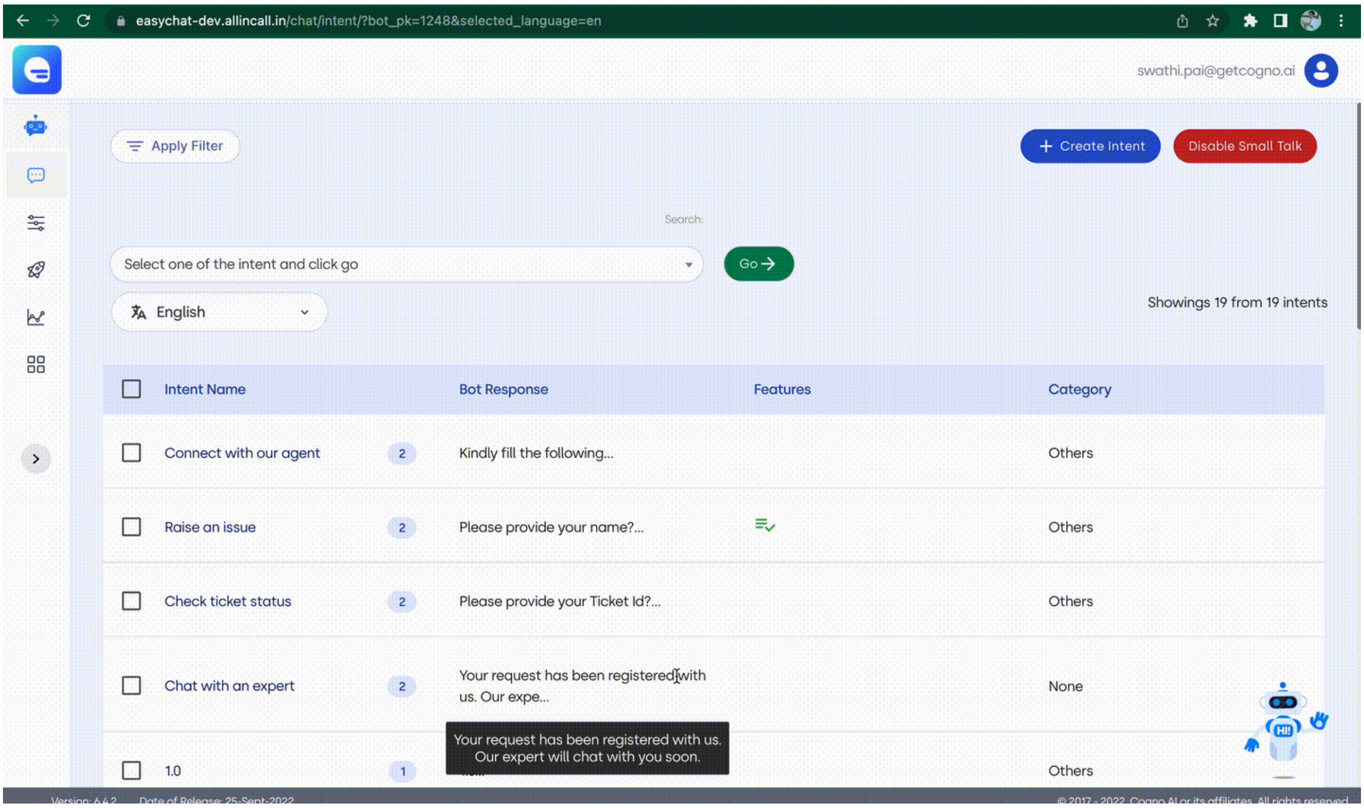
This is visible under Chatbot Console Login > Home Page > Bot Settings> Manage Intent > Click on any Intent or “Create Intent” and the revamped console can be seen.



The new intent page is divided into 3 parts, with the right hand side panel consisting of the configuration settings. Notice that the page is not refreshed for saving any settings henceforth.



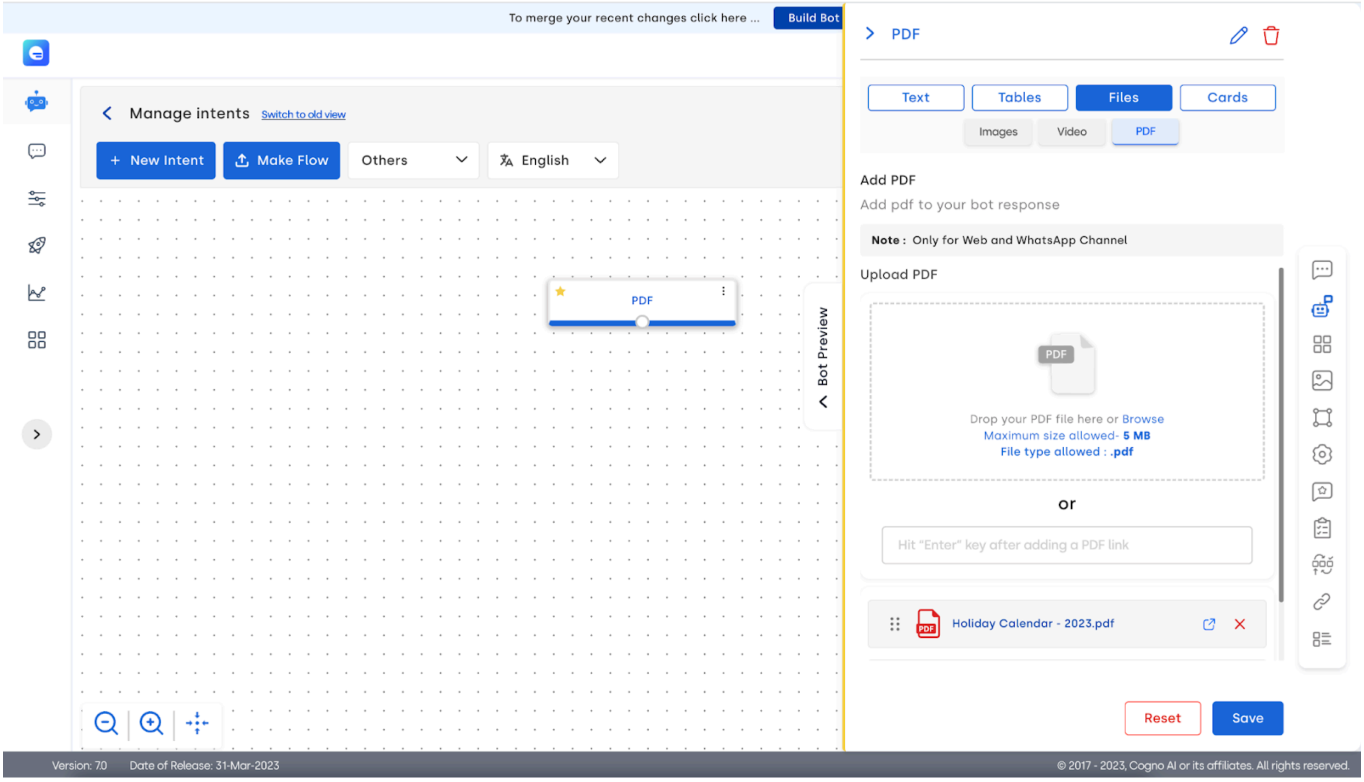
The Bot flow structure gets a drag and drop feature where the node(intent) can be created easily and a flow is generated within minutes. In addition, A bot preview feature is given with all the details how the bot would look when these responses are called. Refer to the working of the feature below:



To get a complete understanding of the creating an intent follow the document here: Edit intent page revamp: Detailed document

Bot response - PDF Providing option for console users to upload PDF files in bot response.

This is visible under Chatbot Console Login > Home Page > Build Bot > Manage Intent > Create/ Edit Intent > Bot response > Files > **PDF**



Users will be able to upload PDF file(s) in the bot response. This will be applicable for Web & WhatsApp Channel Bots only. The max size of the allowed pdf depends on the file size set in bot level settings.

To upload a PDF file user simply needs to drag & drop the file or select file from their system. Alternatively, users can also add a pdf file link to upload the file. Users can also rearrange the order of the PDF or open the file uploaded in a different tab. To delete the file, simply click on the “x” icon provided.

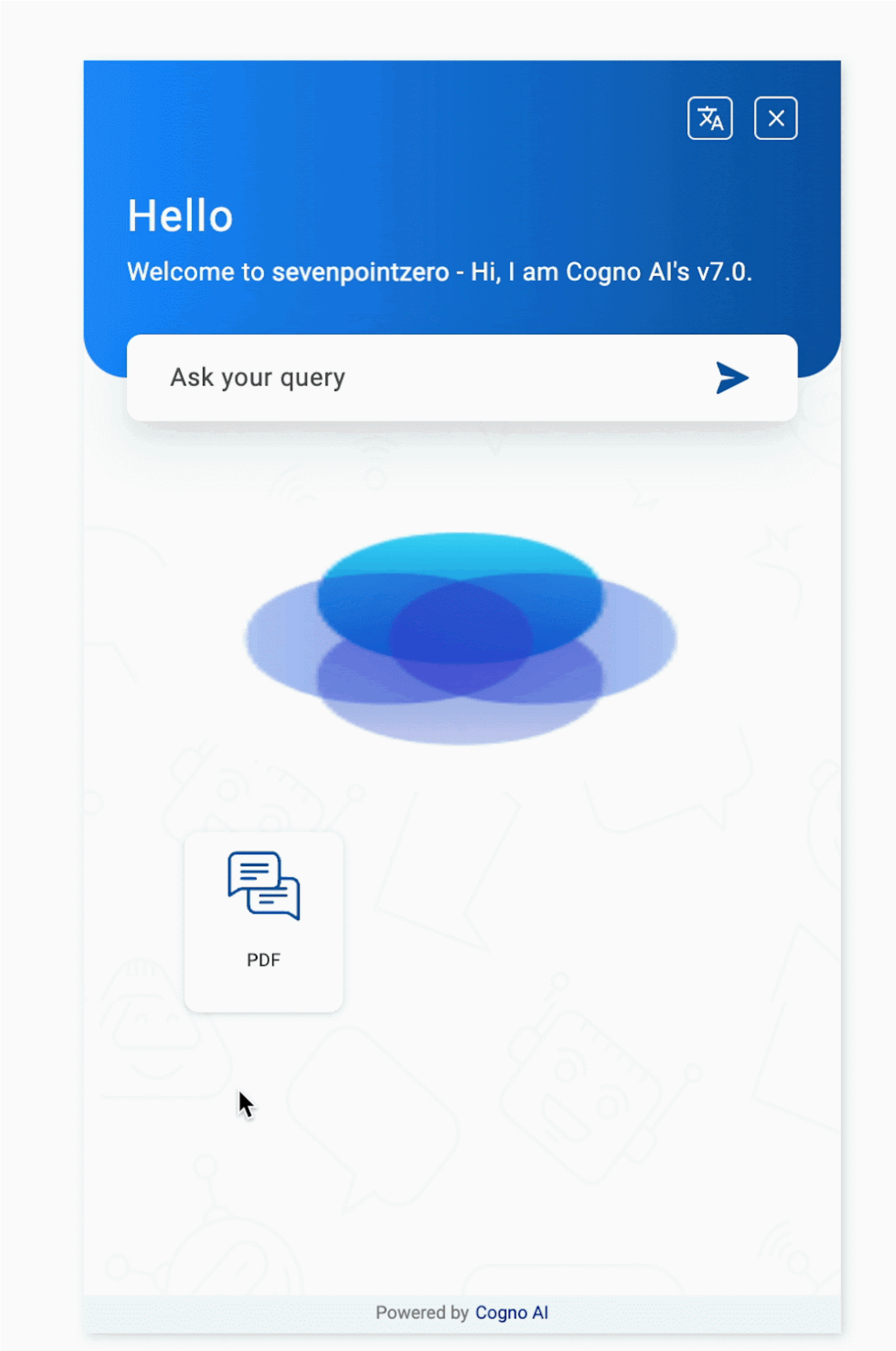
The functionality is also available for **Create bot with excel > FAQs using Excel**. A new column “PDFs (Separate every pdf url with “$$$”)” with a new template.

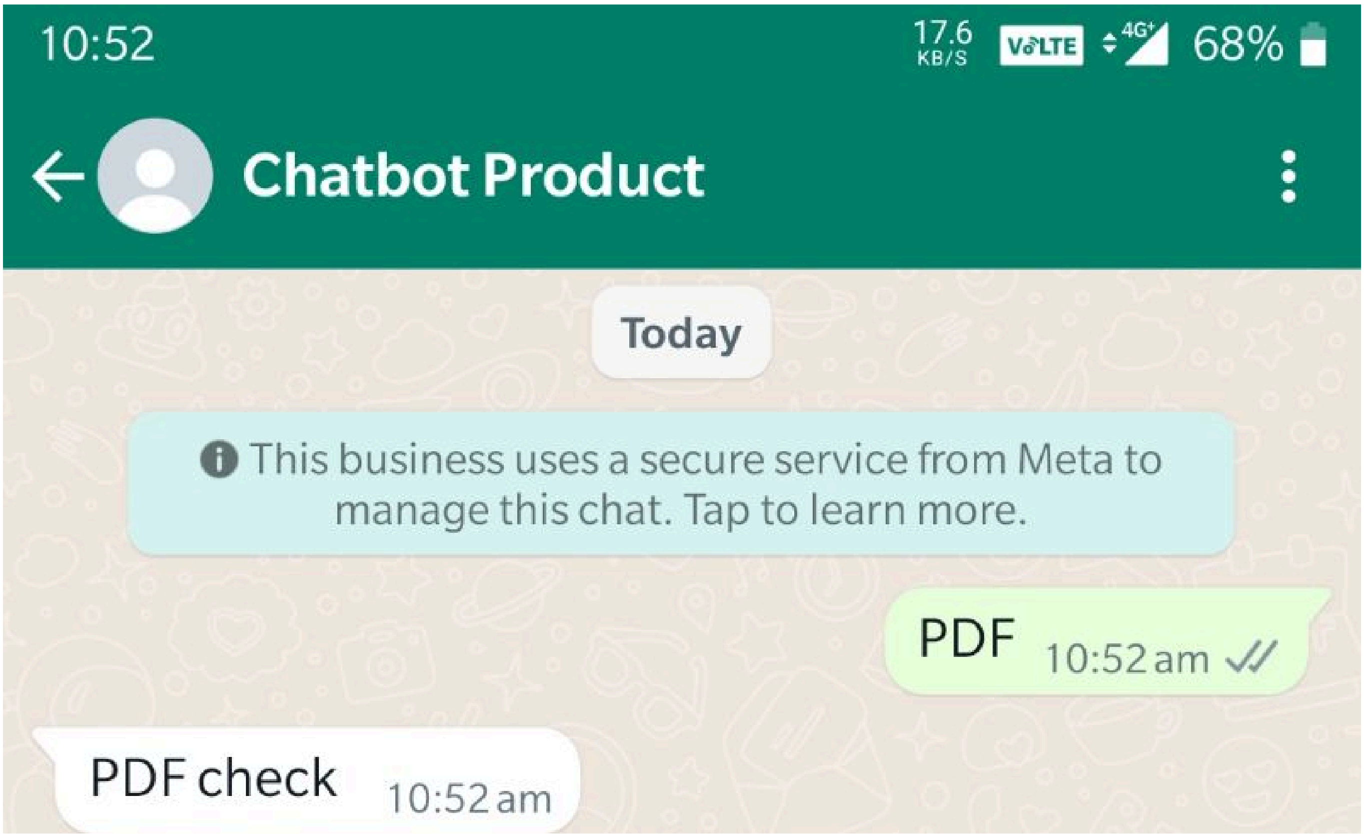
For the Configure Bot > Export & Import Intents: Export as JSON or ZIP: In the JSON file, the section “easychat_botresponses" should have a “PDF” object as well so that the same can be added while importing it as JSON or ZIP.

Export FAQs as excel: A new column is added as “PDF” where the link of the uploaded pdf will be added while exporting the bot.

In API Tree, a new variable has been added to provide the functionality to add the PDFs in bot response for Web and WhatsApp channels.

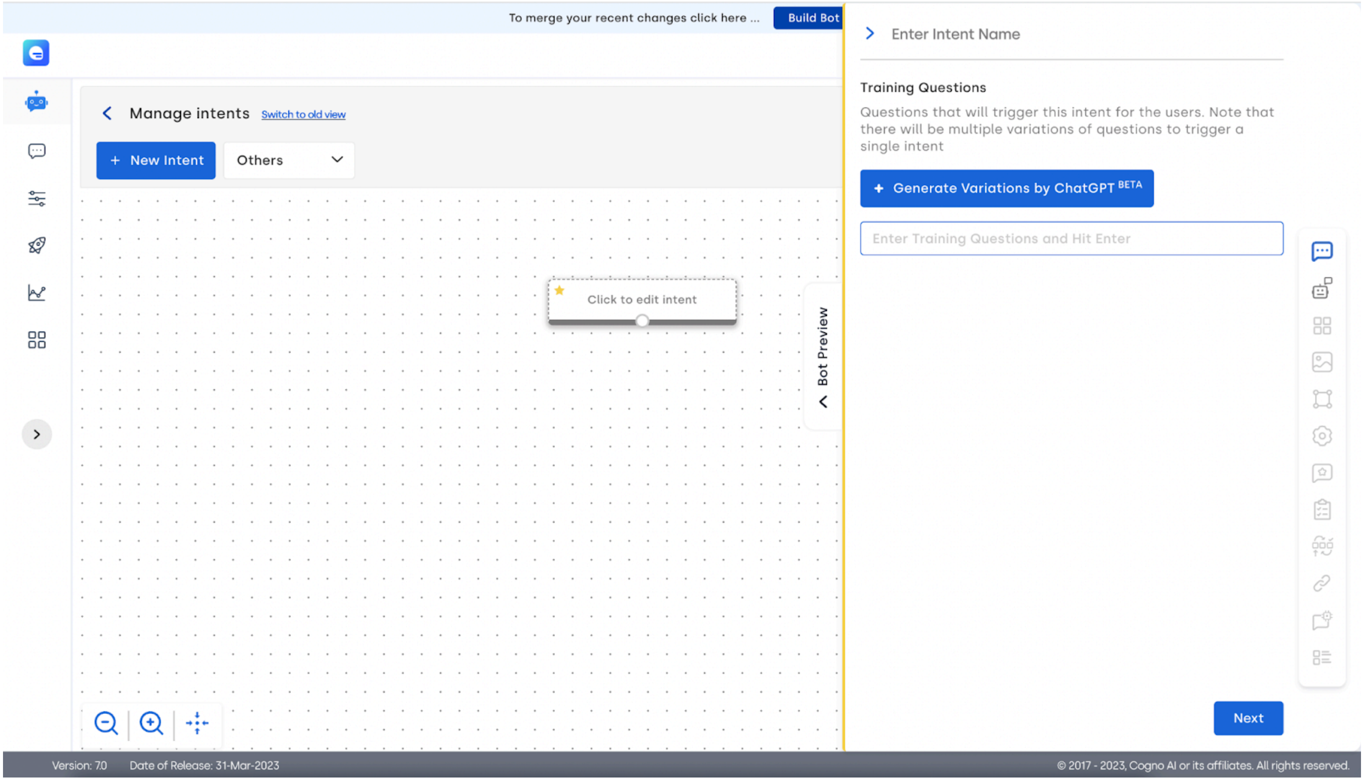
Refer to the working of the feature below:


Hello
Welcome to sevenpointzero - Hi, I am Cogno AI's v7.0.
Ask your query
PDF
Powered by Cogno AI



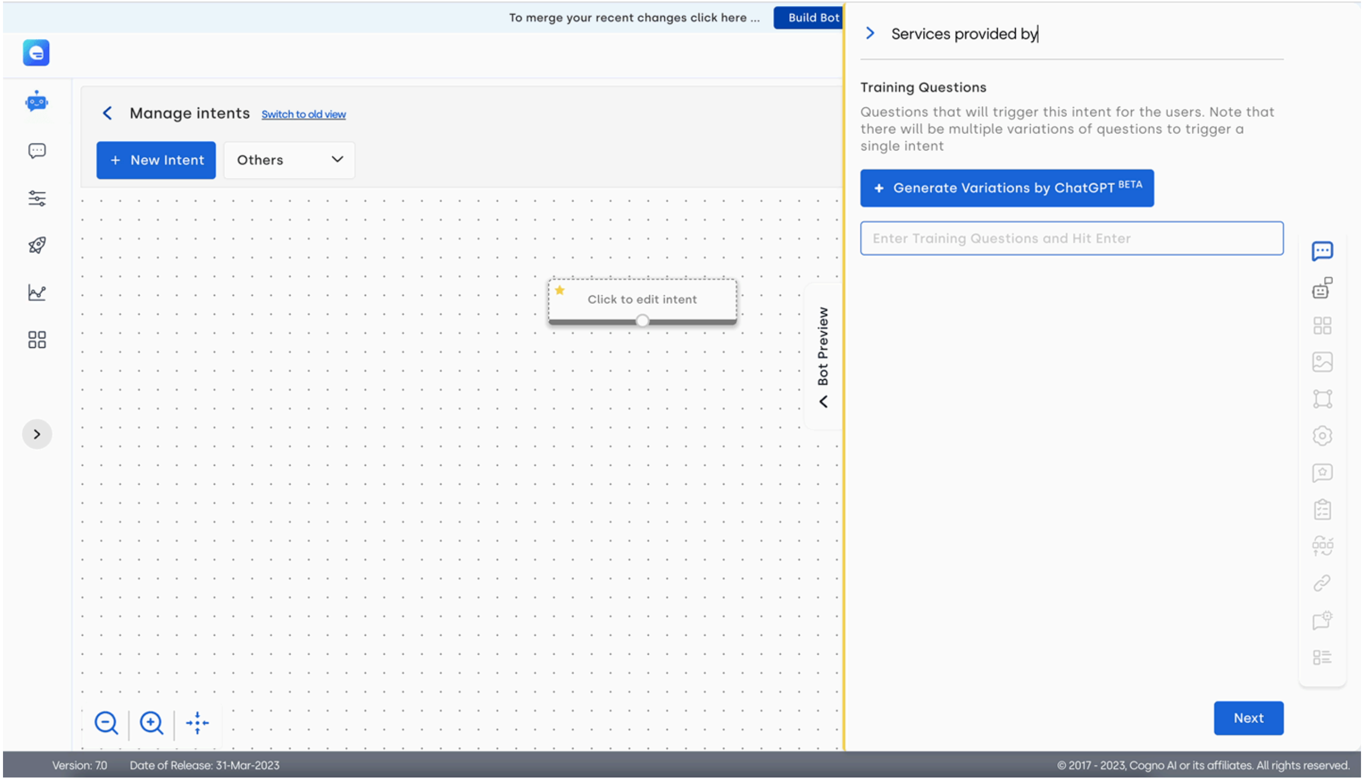
Integrate variation generation with ChatGPTGenerate variations for intent using ChatGPT.

This is visible under Chatbot Console Login > Home Page > Build Bot > Manage Intent > Create Intent > Intent Name & Training Question > Add Intent Name > Click on “Generate variations by ChatGPT”

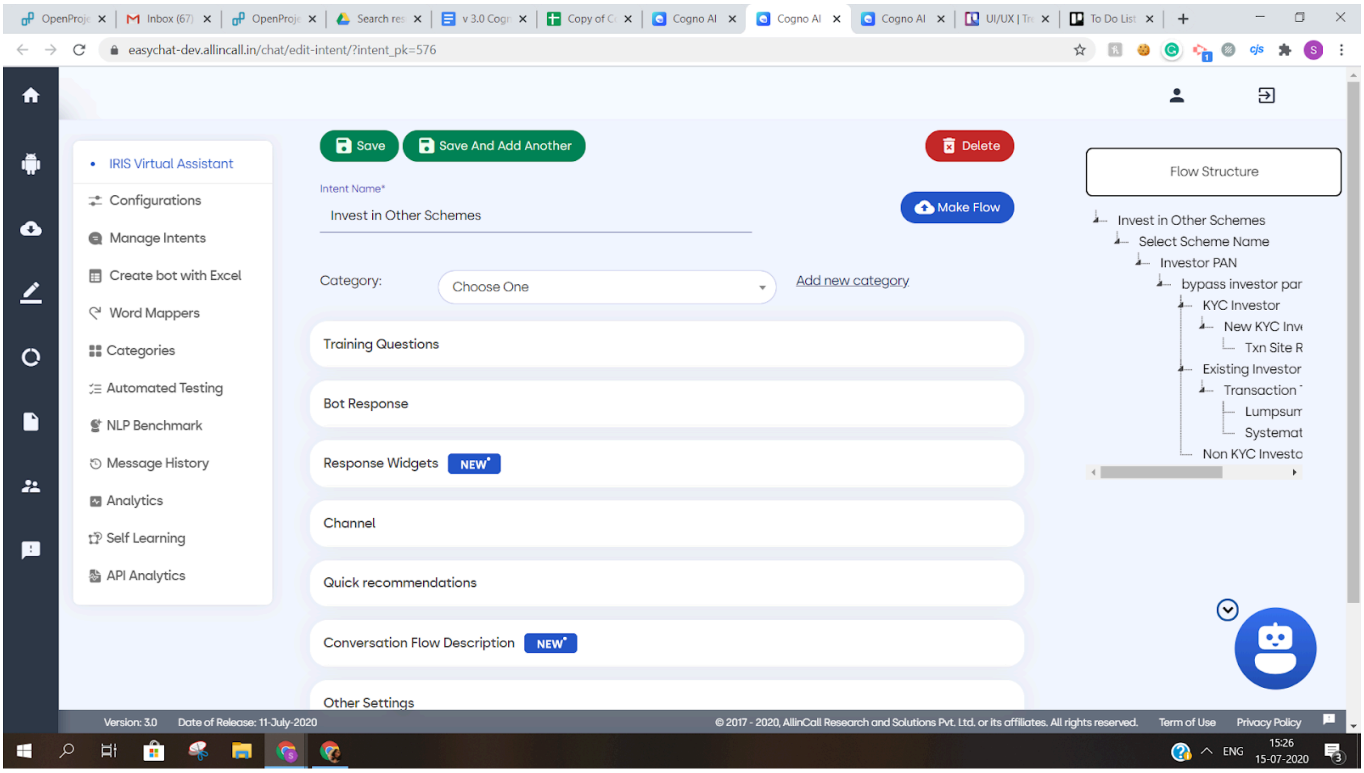


Integrate variation generation with ChatGPT has been implemented for the following features in console:Generate variations from the console (Edit intent page)Create FAQ With ExcelCreate Flow with Excel

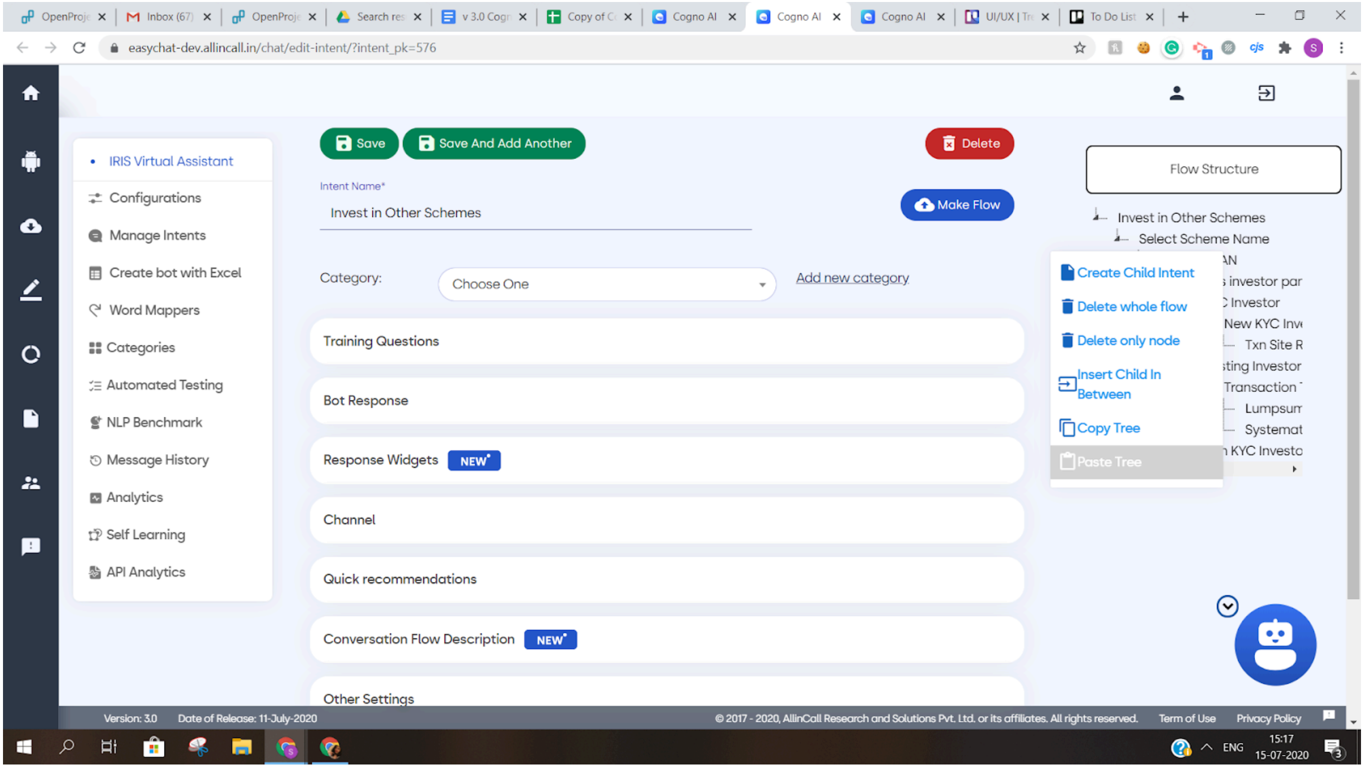
Refer to the working of the feature below:



This is applicable for the old view as well. Bot response type - PDFORSwitch to Old View: New Intents can be added in the ChatBot by clicking on the "Create Intent" button. Clicking on this button will redirect users to a new page. On this page, users can add intent name, variations of intent names, bot response, category of the question and create a user journey in "flow structure" by creating child intents.

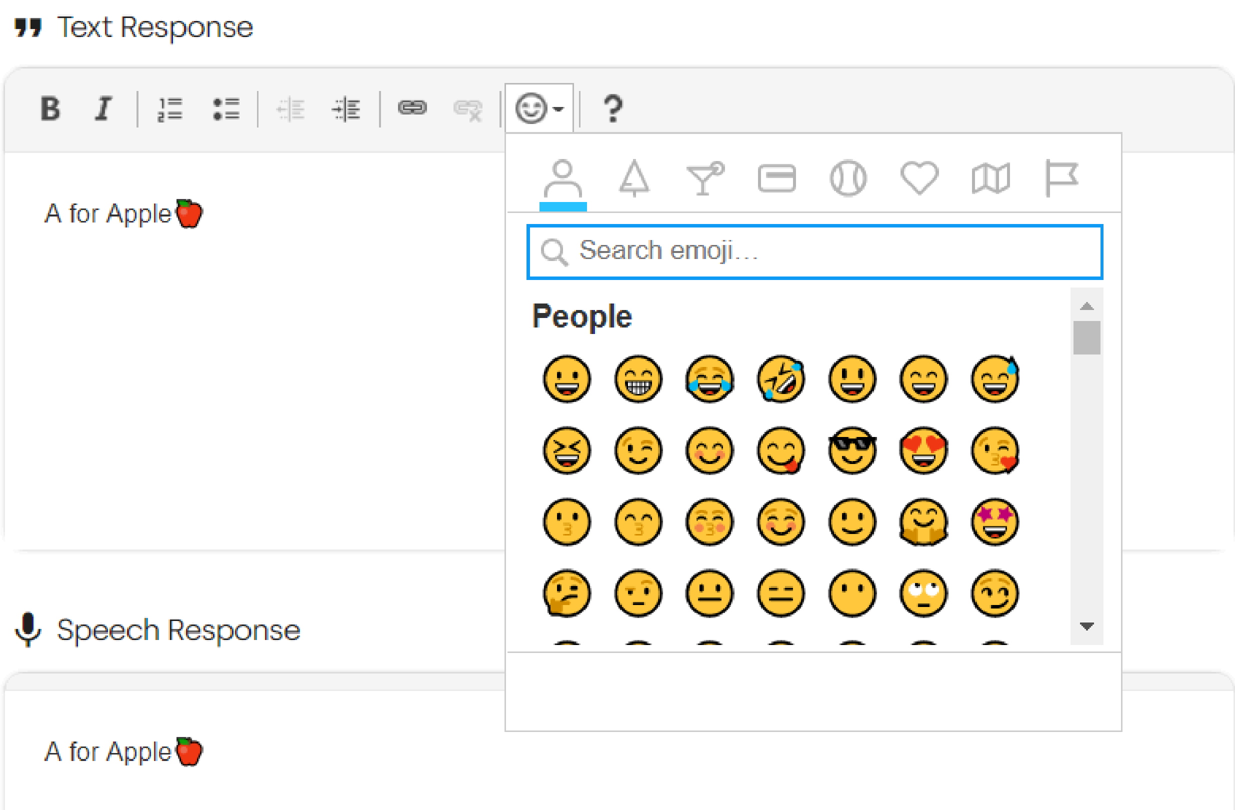


It should be noted that a user journey(flow) can also be created by clicking on the "Make Flow" button and uploading an excel file with the user flow details.



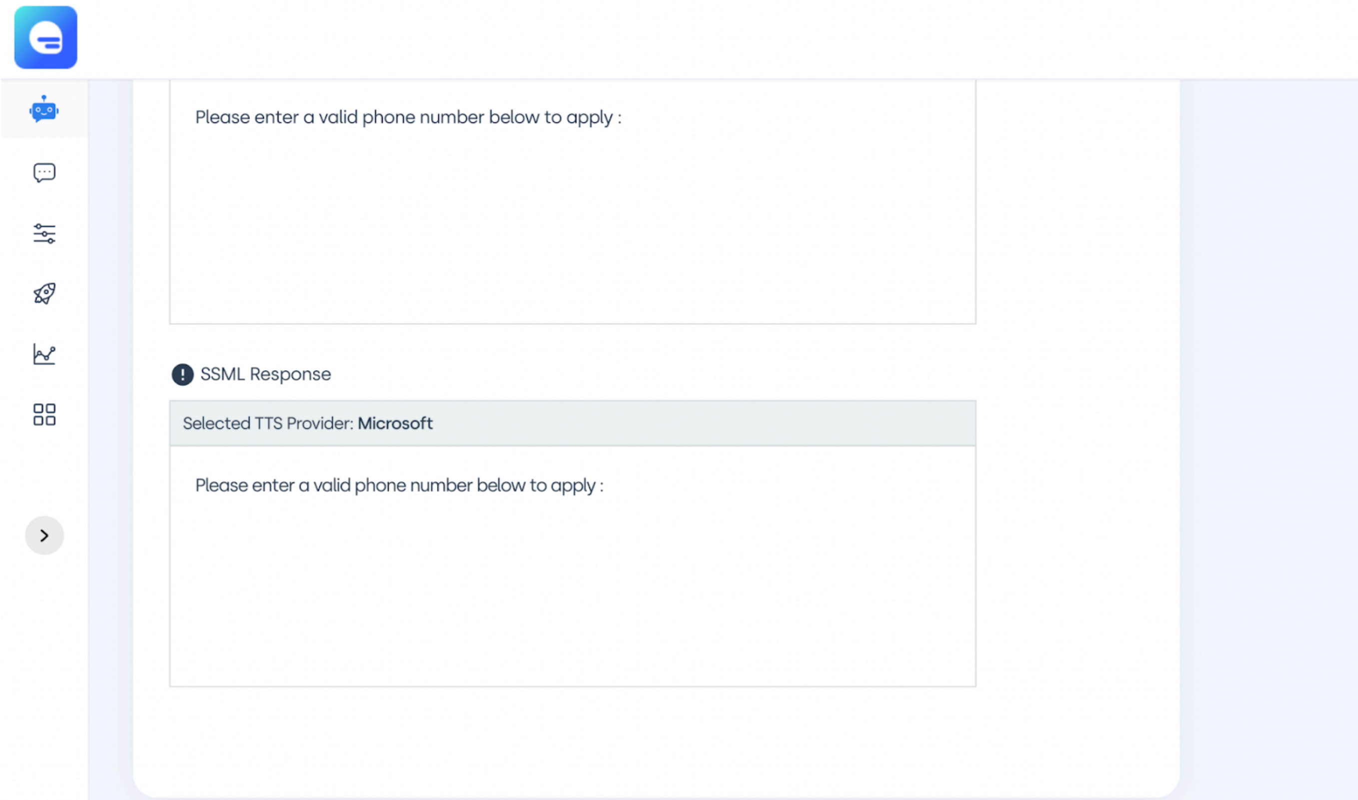
It should be noted that the user journey can be edited by right clicking on the flow structure. Users can copy/insert/delete any node from the existing tree.

Incorporated emoji in Bot response.



A dedicated field is added to configure the voice responses separately for each intent.

To configure : This is visible under : Chatbot console > Build Bot > Manage Intent > Select the Intent > Bot Response > SSML Response

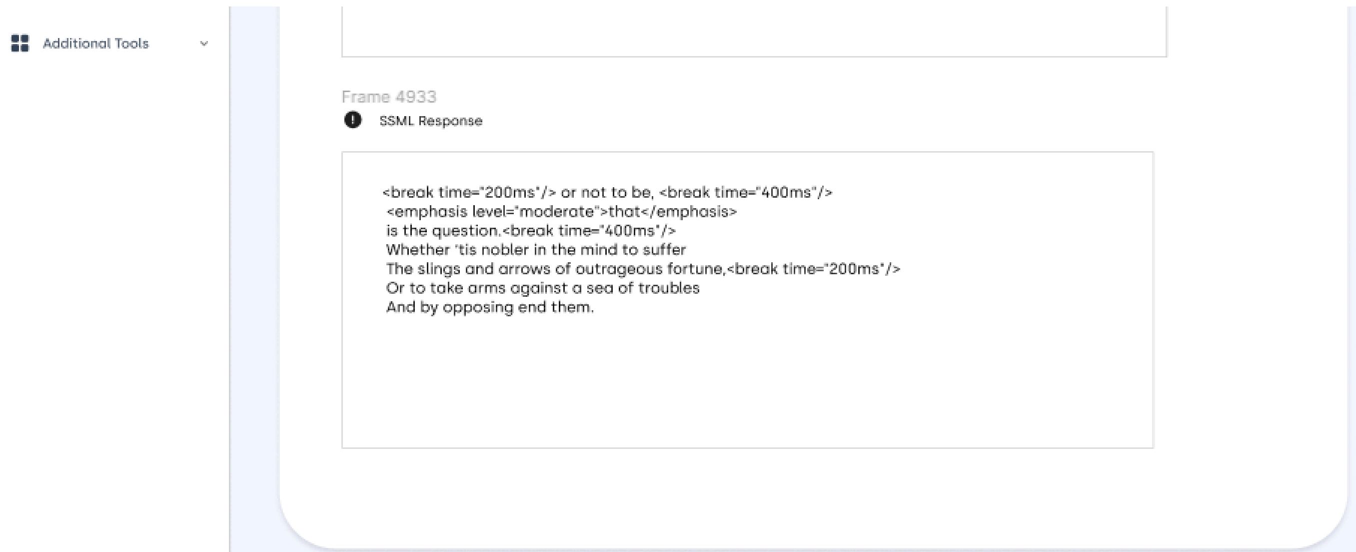


Prerequisites for the user :

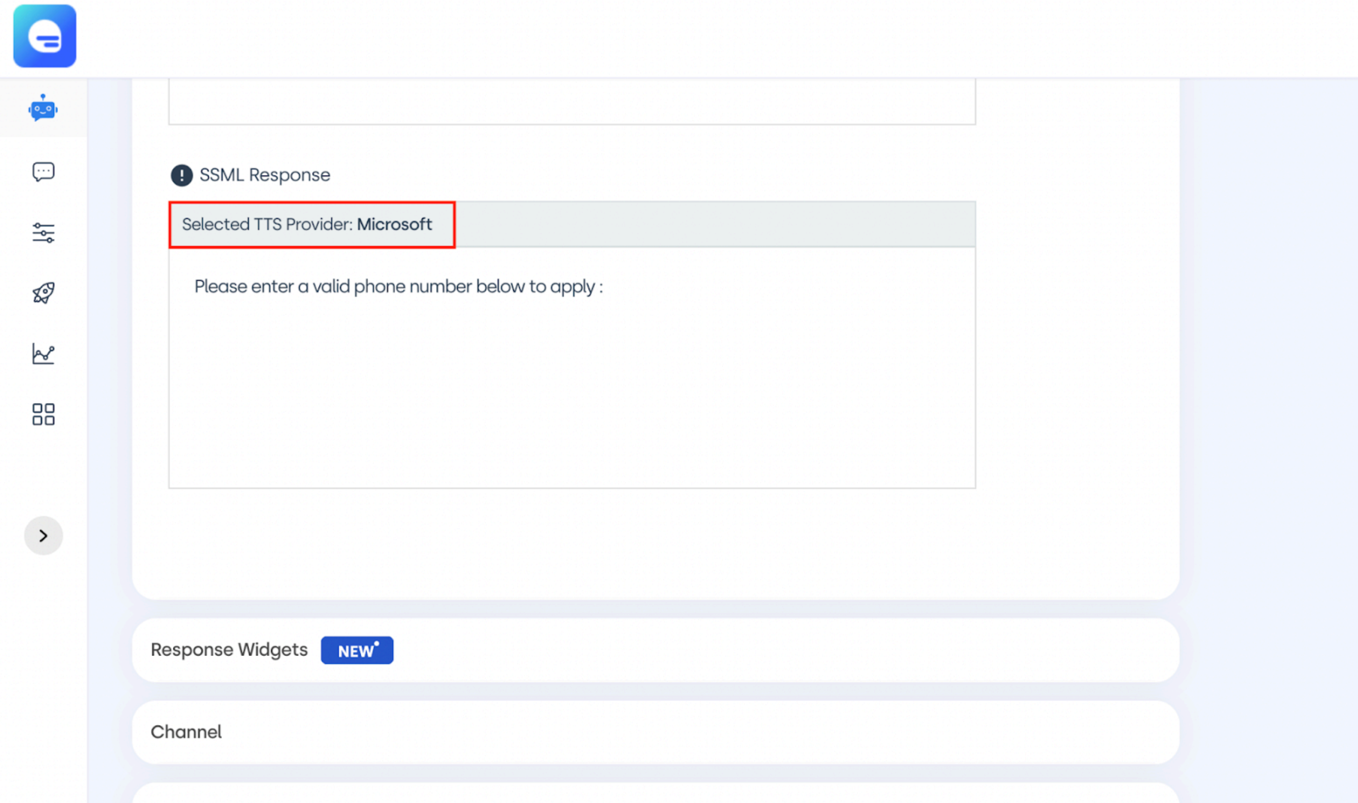
1. Users need to create an Intent and add the response they need in the Text Response field which will be the same as the SSML response by default.
2. They need to configure the TTS Voice Settings as per their requirement for the Chatbot in the Text To Speech Settings section present in the Configure Bot >> Integrate Channels under the Voice channel.
3. If Users do not need any different voice modulation than the Voice setting configured then they can just add a Text only response without any SSML tags.
4. They can preview and listen to the speech style on the respective Provider's pages and then configure these settings by testing them.
5.

Please note: Users can later change the response under the SSML response field if they need the Voice Bot to speak it out differently.

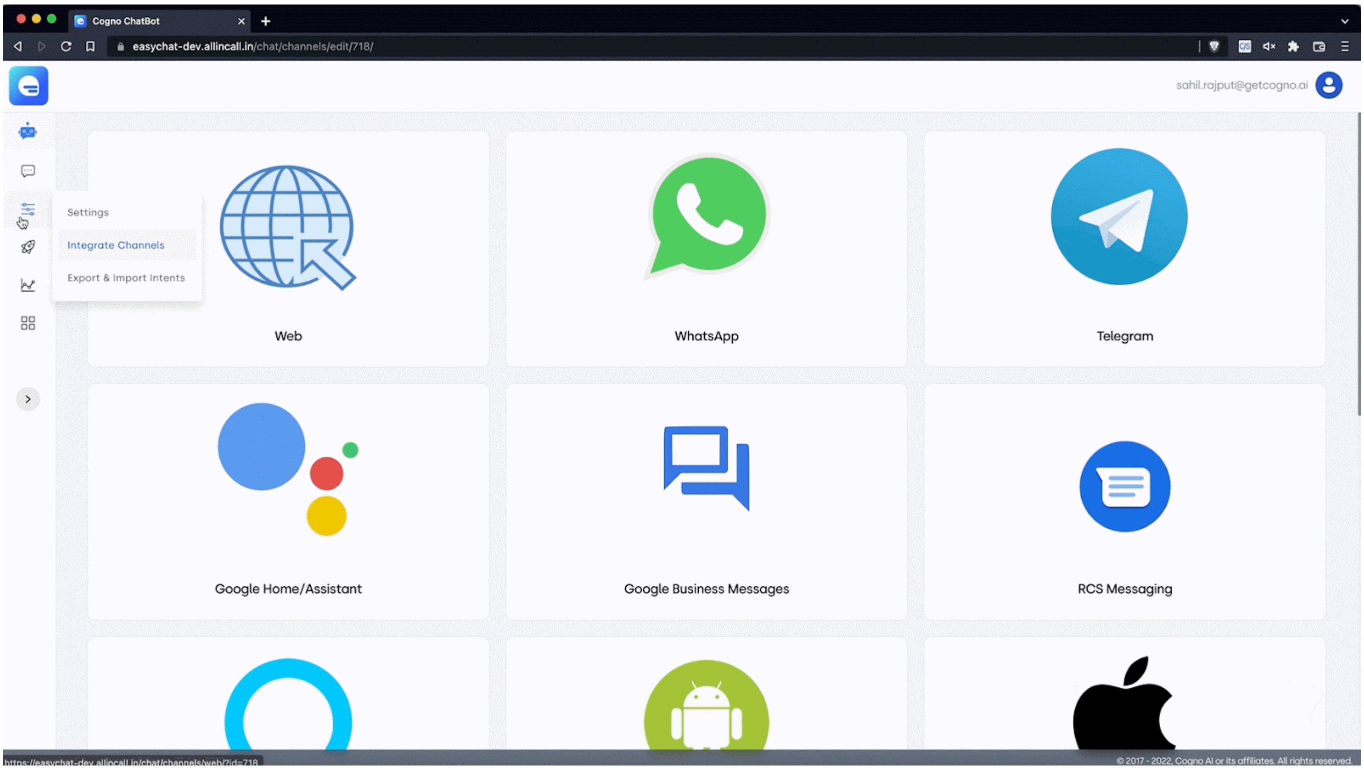
If users need a certain specific speech style on certain intents or on some lines in the text response, they will be able to add their own SSML tags and configure the response. The generic settings will be present but they can add a custom SSML layer on the responses as shown below.



TTS provider name on the top of the text field to make sure which current provider is selected in the settings.



Refer the below shown demo for better understanding



Please note : (Limitations)

1. Users need to change the configurations of the Speech in the TTS settings present in the Integrate Channels section under the Voice channel as per the requirement, or else the default style will be applied to the SSML responses.
2. If users does not configure the TTS settings and not add any custom SSML response in the field, then the bot will apply all the default settings to the SSML responses.
3. TTS for system-generated messages is not supported for now as these messages won't be used in the Voice bot.
4. We cannot add any validations on the custom SSML responses because there are limitations as we won't be able to control and validate a computer language.

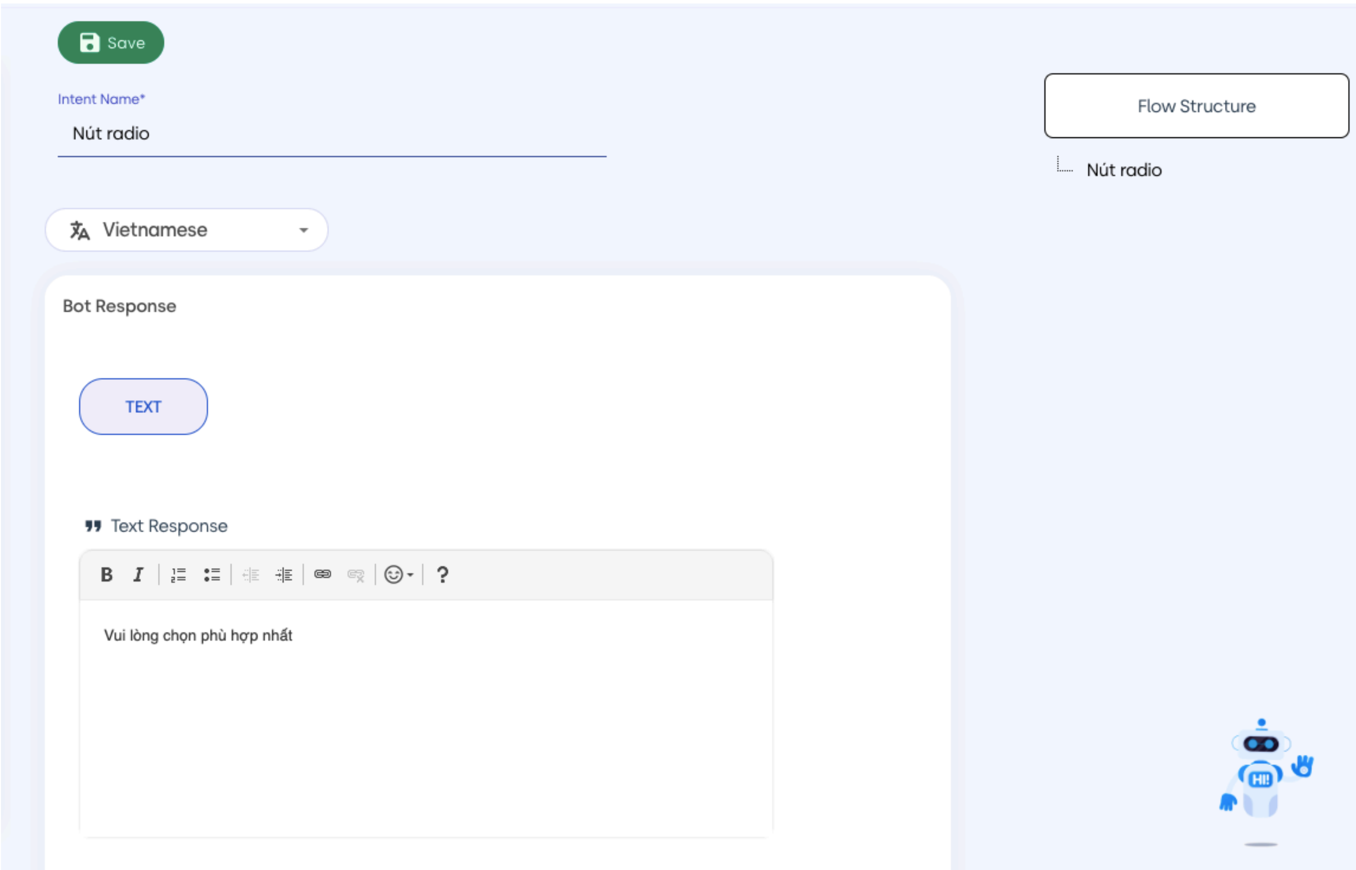
- Fine Tuning of Multi-Languages

Previously languages were auto-generated from the Google translate APIWhich now can be fine tuned based upon the channels & intents.This is visible under

1. Manage Intents > Select the language of your choice

1. Within a particular intent

Select intent > Bot responses in the selected language



Auto-fix for Non Primary Languages in Intent Text, Cards, Table Response, when the primary language is edited, A warning would appear

"⚠ A change has been detected on this intent, Would you like to auto-fix your non-primary languages for this intent?"

[Ignore] [Auto-fix]Note : If the user chooses to [Auto-fix] - The corresponding D.B changes will be auto-generated. If the user chooses to [Ignore] - The corresponding D.B will remain the same as before

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Add Icons For Intents

Providing an option in our ChatBot console to add icons to intents.

To configure :

To Enable/Disable Globally This is visible under : Chatbot > Configurations > Channels > Web > Other Settings > Enable Intent Icon

Document image

For Particular IntentThis is visible under : Chatbot > Manage Intent > Creating / Editing Intent > Intent Icon

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Users will be able to upload icons by clicking on the "+" button or select one from our presets. Once uploaded a preview would be displayed. Also, a "x" button to remove the uploaded image is provided.

Refer the below shown demo for better understanding or Click Here

Document image

Please note : (Limitations)

1. File formats supported are .svg and .png.
2. Maximum file size allowed is 30KB.
3. The ideal dimension (pixel perfect) of the icon is 40x40 px.
4. The toggle to turn on Intent Icons in Web Channel by default will be enabled. If disabled, the Intent Icon card will not be available in the intent settings.
5. If selected from the present list, the colour of the icon will be as per the theme colour.
6. Users will be able to upload only one icon for a particular intent.

Response Widgets

Admin can directly add the following widgets in bot responses:

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- Calendar Picker

Users will have an option to select a single date/customized date and single value for time/custom value for time. Note : All PnCs are Possible in this widget. For further understanding please find the demo shown below.

Document image

- Radio Button

This widget will allow user to select an option from a list of options

- Check Box

This widget will allow user to select multiple options from a list of options

- Drop Down

This widget will allow user to select an option from a drop down

- Video Recorder

- This widget will allow users to record a video and send it as a response to the bot

- Range Slider

This widget will allow user to provide an input within a defined range

- File Attach

This widget will allow users to attach several files such as documents (.pdf, .doc), images (.png, .jpeg), compressed file (.zip), video file (.mp4)

- Create Forms

This widget will allow users to fill a form in the chatbot. While creating forms, the user can add multiple widgets like dropdown, radio button, checkbox, range sliders etc. Create a form widget. Enable the form allowed checkbox. A drop down of input type will enable the user to add the widgets.

Document image

Document image

Document image

Document image

All the data collected by the customers through form can be downloaded from the download reports module.

To configure **Phone Number in Form Widget** : This is visible under : Chatbot Console > Build Bot > Manage Intent > Select any Intent > Response Widget > **Create Form** Widget > Input type > **Phone Number**

Document image

A new addition (i.e **Phone Number**) to the input types in form widgets. Once the console user selects Input type as phone number they will have an option to select the default country code. Please Note: The **Default Country Code** selection option will be visible to the user only if they enable the previous option which is **Enable County Code**. Also, the default country code is set as **India**.

Remaining all the functionalities in the form widget for eg. Label Name, Placeholder Text, Reset, Optional field marking, Integrate API, Sync Preview, Update API Status will work as they work currently.

(Image attached below for reference)

Document image

Form widget with input type as **Phone Number** on bot side will be shown as given below:

Document image

For multiple cases where user enters an invalid input for eg. adding a smaller length of number/ longer than the ideal length of number/ invalid input error messages will be displayed accordingly. (Images attached below for a few such cases). Please Note: In the case of forms, validations will be done once the user clicks on submit.

Document image

Document image

Console users will be able to look up for the desired selection of the default country code using the search bar provided in the drop down. Please Note: Selecting this will replace the previous selection/ default country code set.

Document image

Document image

Bot users will be able to look up for the desired selection in the country code using the search bar provided in the drop down. Please Note: Selecting this will replace the previous selection/ default country code set.

Document image

Document image

Phone number entered will be available in the same format i.e along with the country code in Message History, Excel sheets downloaded.

This is also applicable for the livechat form.

Document image

Phone Number Widget

An option to add a widget **Phone Number** with a country code for use cases where it is required to take such input from the end-user.Also, added **Phone number** as an independent field as an input type in the currently existing Forms Widget.

To configure **Phone Number Widget** : This is visible under : Chatbot Console > Build Bot > Manage Intent > Select any Intent > Response Widget > **Phone Number** Widget

Document image

Once the user selects the widget **Phone Number** they will be asked to enable country code. Enabling this, the console user will be able to set the default country code to be shown during input in the bot. Select the country code and click on save. As shown in the below image. Once this is saved, save the changes made to the intent. Please Note: The **Default Country Code** selection option will be visible to the user only if they enable the previous option which is **Enable County Code**. Also, the default country code is set as **India**.

Document image

Phone number widget on bot side will be shown as given below:

Document image

For multiple cases where user enters an invalid input for eg. adding a smaller length of number/ longer than the ideal length of number/ invalid input error messages will be displayed accordingly. (Images attached below for a few such cases).

Document image

Document image

Console users will be able to look up for the desired selection of the default country code using the search bar provided in the drop down. Please Note: Selecting this will replace the previous selection/ default country code set.

Document image

Document image

Bot users will be able to look up for the desired selection in the country code using the search bar provided in the drop down. Please Note: Selecting this will replace the previous selection/ default country code set.

Document image

Document image

HighlightsRed Highlights are in cases where there is an error message shown.Green Highlights are in cases where there is a correct input.

Document image

Integrate API Dynamically In Form Widgets Providing a solution to allow our clients to integrate APIs and dynamically populate values inside Dropdowns, Checkboxes, Radio Buttons and Range Selectors, Input fields inside "Create Form" widget.

To configure : This is visible under : Chatbot > Manage Intent > Select Intent > Response Widgets > Forms

Document image

All dynamic fields should be individually configurable or they can be configured with dependencies. To map the dependencies, while creating a form section user needs to turn on

"Dependent Field" toggle, which will then ask for a prior field Label, based on the value of which the api call in the current field would be done to populate values.

Please Note : While creating a form the first section won't have a dependent toggle. Following that, all added sections should have the dependent toggle.

While interacting on the bot if the user has completed a dependent journey and after that he tries to change the prior parent selection, all the child values will also get resetted.

Refer the below shown demo for better understanding

Document image

WhatsApp Chatbot Menu Option in Console

Provided an option to add the Whatsapp Menu from the front end where the bot admin can create sections and add the child intent and quick recommendations within a section.

To configure: This is visible under Chatbot > Build Bot > Manage Intents > Intent > WhatsApp Menu Format

Document image

Console user needs to enable menu format which will provide an option to add sections. Please note: The number of Child intents + Quick recommendations should be greater than 3 and less than 11 irrespective of the number of sections.

The sync preview button will be in the disabled state unless and until the bot admin adds any section.

To add a section: Click on **+ Section which will open a modal as shown below.**

Document image

Users will have an option to add child intents(if exists for the intent) and main intents (Quick recommendations).Once the bot admin selects the intents, a preview will be available on the right.

Document image

Clicking on the added intent will redirect the user to the specific intent's setting page. Users will be able to drag and change the order of intents/ recommendations added by clicking on the edit icon on the right top corner of individual sections.

Button title can be set in the intent > channels option provided. Applicable for both, main intent and child intent.

Intent > Advanced Settings > API tree The admin can add Intents + Quick recommendations via an API, however, the preview section will be available while using the bot.

User Chat History WhatsApp menu format will be available in the below-shown format.

Document image

Refer to the below-shown demo for a better understanding

Please note : (Limitations) This will only be available when WhatsApp is added to the channels.

Campaign Links- The admin can create a campaign link for a particular intent which can then be used for promoting certain webpages by making the users land on the specified web page and triggering the selected intent.

Document image

Manage Intents Filter - Users will be able to filter by channels/ type/ category of intent. This is visible under Manage Intent > Filter > Filter by Intent Type/ Category/ Channel

Document image

Document image

1.2.1.2. Flow Builder (v8)

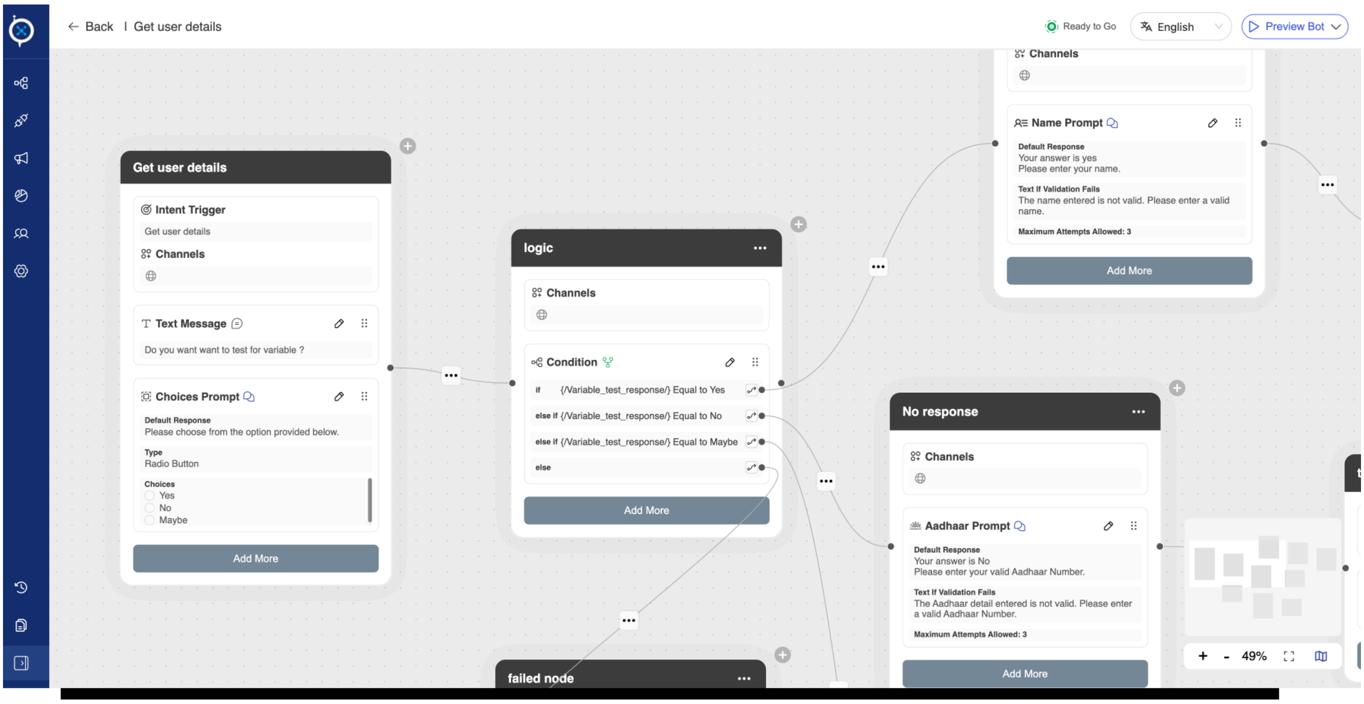
Overview

The **Flow Builder** is the visual heart of the Exo-Chatbot platform, providing a powerful no-code interface for designing and automating conversational user journeys. It is a canvas-based tool where you can map out every step of a conversation by creating and connecting nodes. Each node represents a point in the conversation and can contain various elements, such as sending a message, asking the user for information, performing a backend action, or applying conditional logic.

This visual approach allows you to craft everything from simple, single-turn interactions to complex, branching dialogues that can integrate with APIs, query databases, and execute custom code. The Flow Builder is designed to be intuitive, enabling both technical and non-technical users to build, test, and manage sophisticated chatbot logic without writing a single line of code.

Key components of the Flow Builder include:

- **The Canvas**: An infinite workspace where you arrange and connect your conversation nodes.
- **Nodes**: The building blocks of a conversation, representing a step or a state in the user's journey.
- **Elements**: Specific items you add inside a node, categorized as Bot Messages, Prompts, Actions, and Logic.
- **Connectors**: The lines you draw between nodes to define the flow of the conversation from one step to the next.



Ultimately, the Flow Builder is where the abstract concept of a user conversation is transformed into a functional, automated, and interactive experience.

How to Use the Flow Builder

This guide provides a detailed walkthrough of the Flow Builder interface and its core functionalities.

2.1 Accessing the Flow Builder

1. **To create a new flow**: Navigate to **Workflow -> Flows** and click the **+ Create Flow** button.
2. **To edit an existing flow**: From the **Workflow -> Flows** page, locate the flow in the table and click the **Edit** (pencil) icon in its **Actions** column.

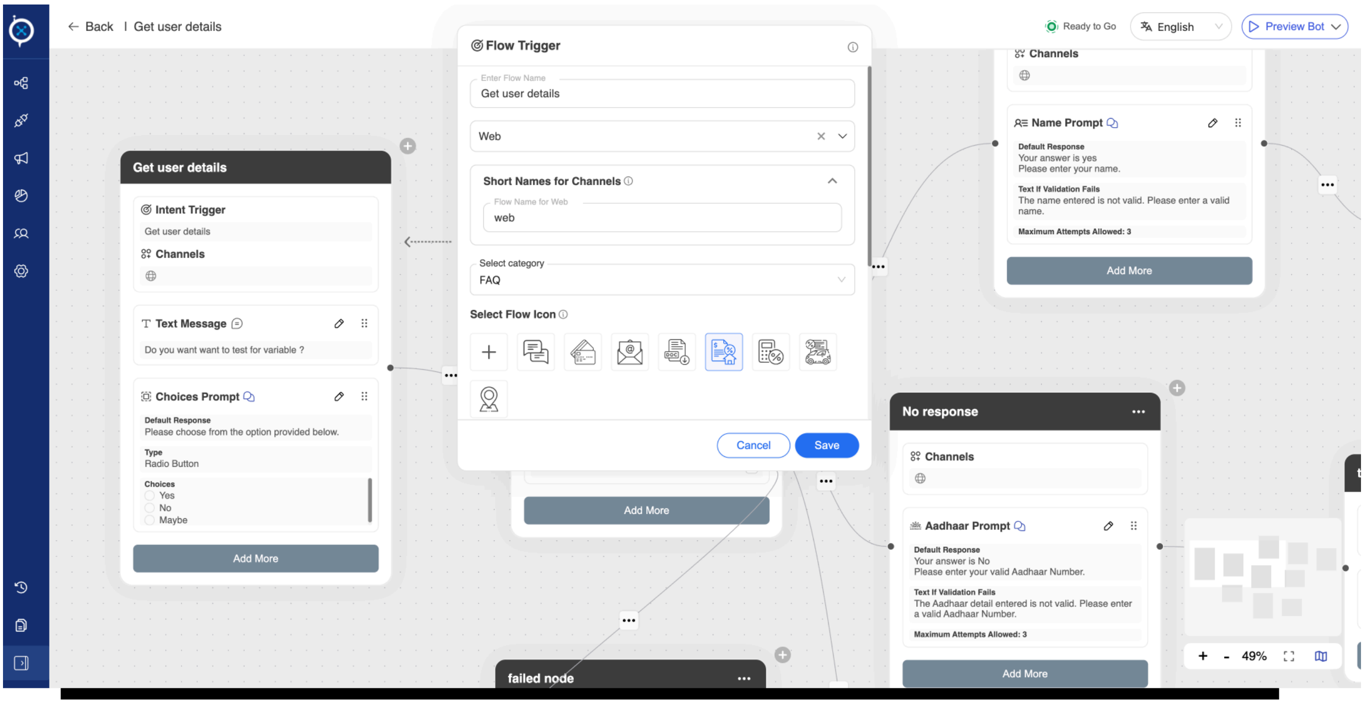
2.2 The Flow Builder Interface

- **Top Navigation Bar**: Contains the **Back** button, **Flow Status** (which indicates errors), a **Language Switcher** for multilingual bots, and the **Preview Bot** button for real-time testing.
- **The Canvas**: The main workspace where you build your conversation by adding and connecting nodes.

- **Flow Map**: A mini-map in the bottom-right corner that helps you navigate large, complex flows.

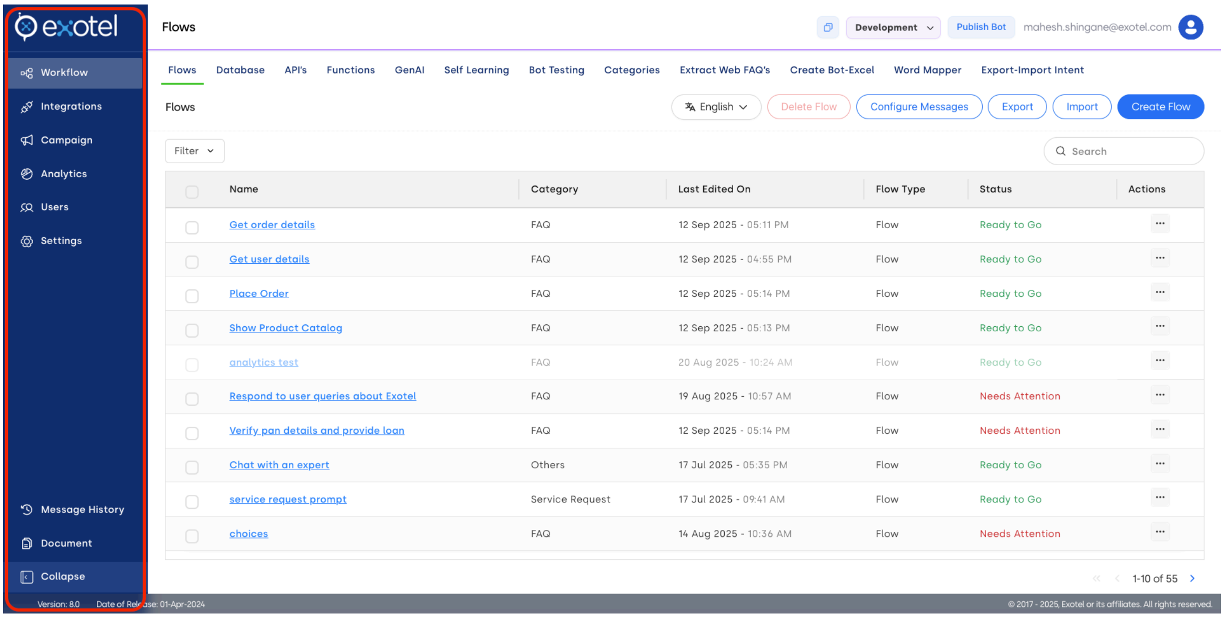
2.3 Building a Conversation

- **Configuring the Intent Trigger (First Node)**:
  - Every flow starts with an **Intent Trigger** node. Click it to configure.
  - **Flow Name**: The primary phrase that triggers the conversation (e.g., "Check Order Status").
  - **Training Questions**: Add alternative user phrases (e.g., "track my package").
  - **Select Channels & Category**: Assign the flow to specificchannels and an organizational category.

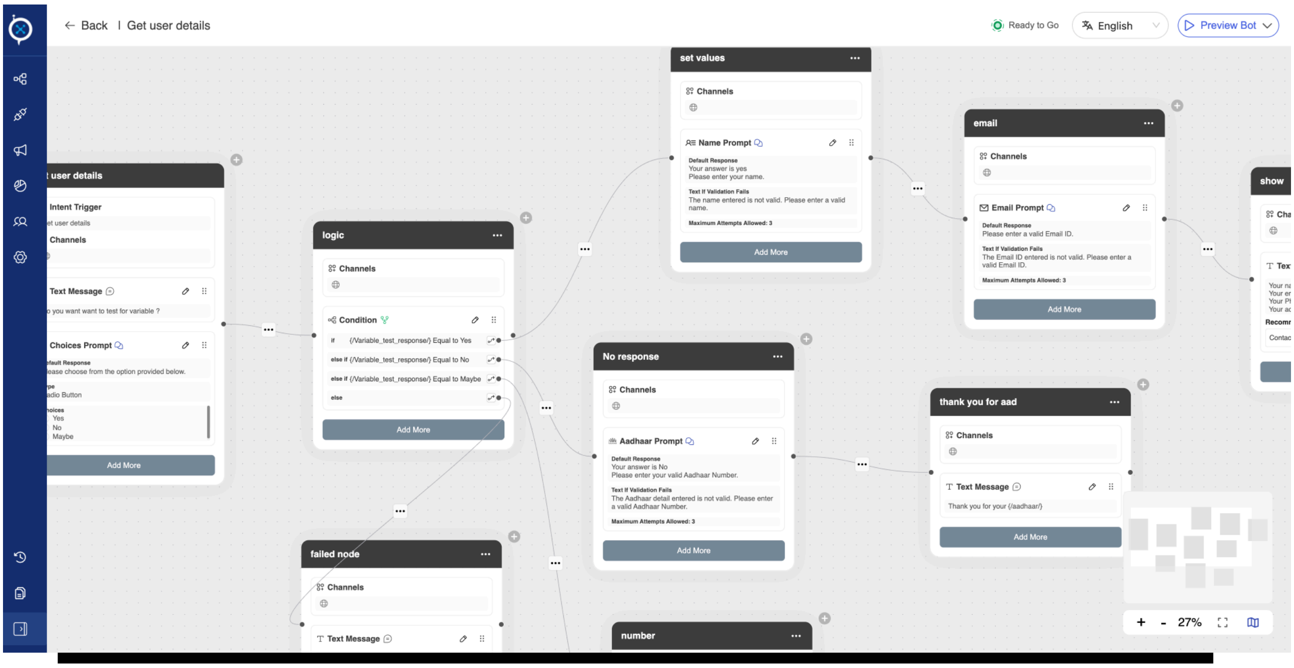


Adding Steps (Nodes) to the Flow:

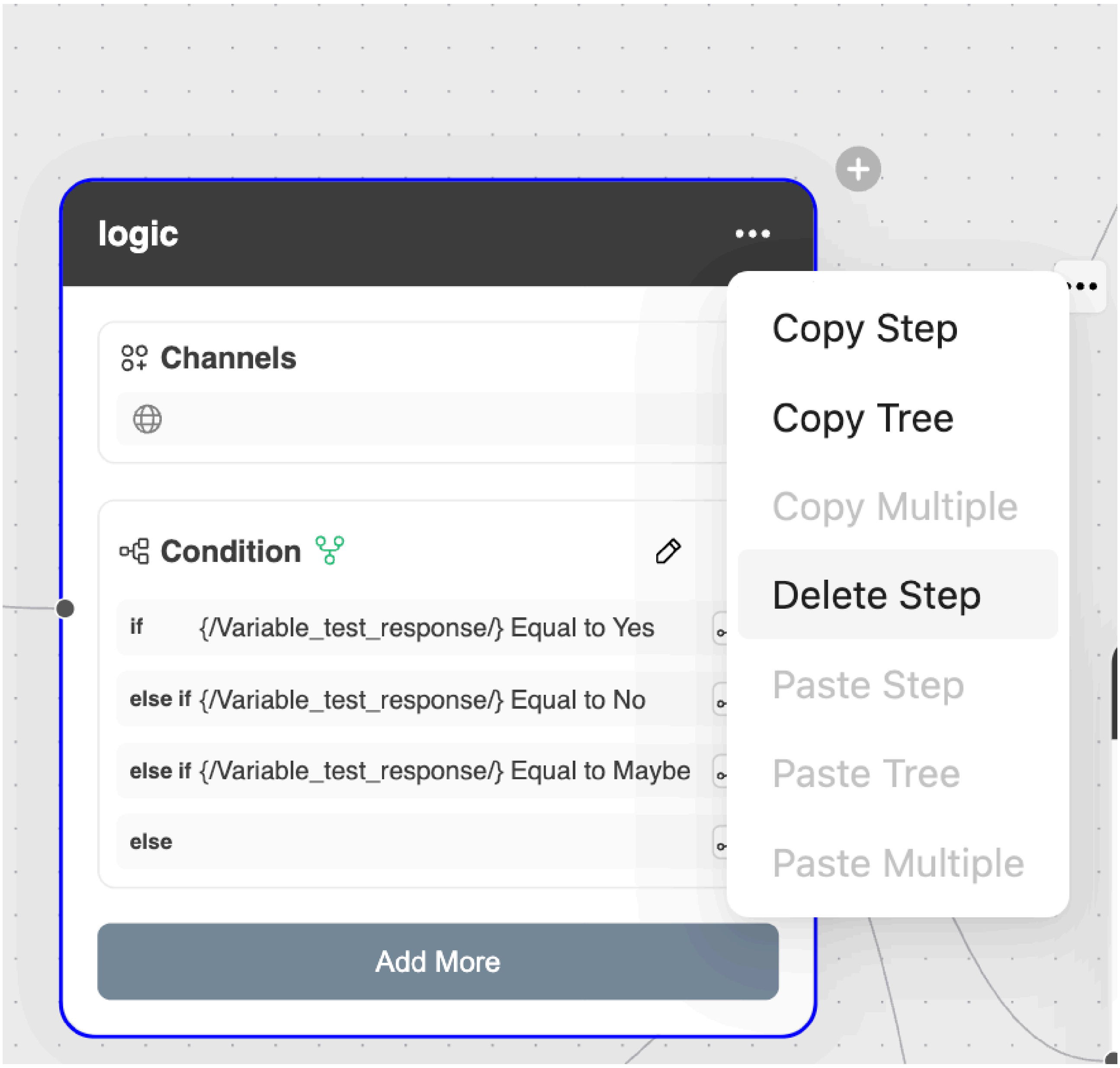
- Click the + icon on an existing node to add a new step.
- This opens a menu with four categories of elements to add:
  - **Bot Messages**: To send information to the user (Text, Image, Carousel, etc.).
  - **Prompts**: To get information from the user (Text, Quick Replies, Form, etc.). User input can be stored in variables.



- **Connecting Nodes**: Drag the circular connector from one node to the next to define the conversation path. Logic nodes (like **Condition**) will have separate connectors for different outcomes (e.g., If/Else), allowing for branching paths.



- **Managing Nodes and Elements**:
  - Click the three-dot menu on a node to **Copy Step**, **Copy Tree** (node + all subsequent nodes), or **Delete Step**.
  - Within a node, you can **Edit**, **Delete**, or **Rearrange** the individual elements.



- **Saving and Testing**: The builder auto-saves. Use the **Preview Bot** button frequently to test your logic.

Common UseCases:

- **Restaurant Table Reservation**:

1. **Intent Trigger**: "Book a table"
2. **Prompt (Form)**: Ask for Number of guests, Date, and Time. Store these in variables.
3. **Action (API)**: Call the reservation system's API with the collected variables.
4. **Logic (Condition)**: Check the API response. If successful, send a confirmation message. If not, inform the user the time is unavailable.

- **Customer Support Ticket Creation**

1. **Intent Trigger**: "I have a problem"
2. **Prompt (Quick Replies)**: "What is this regarding? [Billing] [Technical Issue]"
3. **Prompt (Text)**: "Please describe your issue." Store the description in a variable.
4. **Action (Database)**: Use Insert Entry to save the details to a "Support Tickets" table.

Best Practices

- **Keep Flows Focused**: Each flow should accomplish one primary goal. Break complex processes into smaller, reusable flows linked with the Execute Flow action.
- **Name Nodes Clearly**: Descriptive node names (e.g., "Ask for Email," "Check API for Availability") make large flows much easier to understand and debug.
- **Always Build Failure Paths**: When using an API or Database action, always connect the Failure path to a node that gives the user a helpful message.
- **Use Variables Extensively**: Store every piece of user input in a variable. This enables personalization and allows you to pass data between steps and to external systems.

Common Mistakes

- **Creating "Spaghetti" Flows**: Avoid crossing connector lines all over the canvas. If a flow becomes too messy, it's a sign it should be broken into smaller, more manageable flows.
- **Forgetting to Store Prompt Responses**: A common error is asking the user a question with a Prompt but forgetting to select a variable to store their answer in.
- **Dangling Nodes**: Every node should be part of a complete path. A node that isn't connected to anything is a dead end and will break the conversation.
- **Not Setting a Default/Else Condition**: When using a Condition node, always define the Else path to handle any case that doesn't match your If conditions.
- **Ignoring Asynchronous Behavior**: API calls can take time. Design your flow with "Please wait" messages where necessary to manage user expectations.

Note: This flow builder is available on version 8 and onwards.

1.2.1.2.1. Bot Message

Overview

Bot Messages are a fundamental category of elements within the Flow Builder used for one-way communication from the chatbot to the user. Their primary purpose is to present information, provide responses, and display rich media to guide and engage users throughout a conversation. Unlike "Prompts," which are designed to collect user input, Bot Messages are purely for output.

These elements are essential for crafting a user-friendly and interactive experience. You can use them to send a simple greeting, display a product image, share a detailed brochure, or present a scrollable list of options. The Exo-Chatbot platform supports a wide variety of message types to cater to different conversational needs and channels.

The available Bot Message types are:

- **Text**: For standard text-based communication.
- **Image**: For displaying static images.
- **File**: For sharing downloadable documents.
- **Audio**: For playing sound clips.
- **Table**: For presenting data in a structured grid.
- **Video**: For sharing video content.
- **Carousel**: For showcasing a series of interactive, scrollable cards.

By combining these elements, you can build rich, dynamic, and visually appealing bot responses that go far beyond simple text.

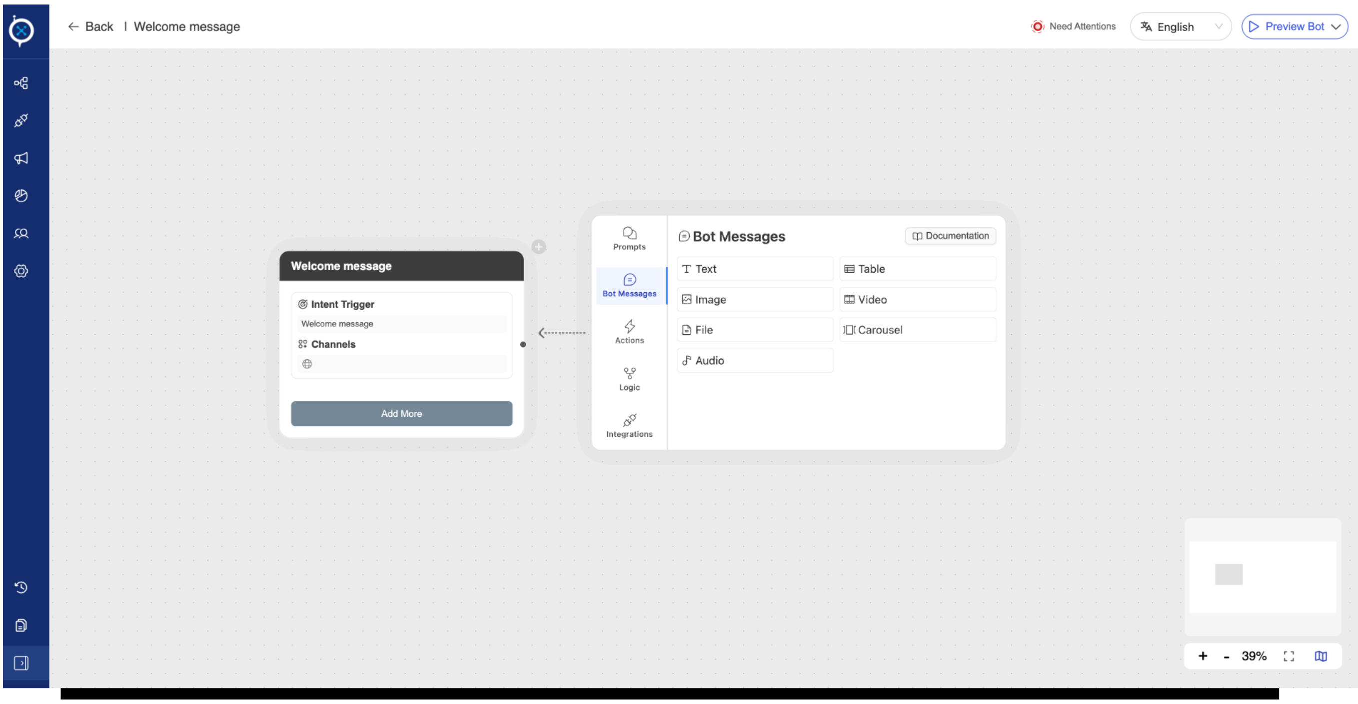
How to Use Bot Messages

Bot Messages are added as elements inside a node on the Flow Builder canvas.

2.1 Adding a Bot Message

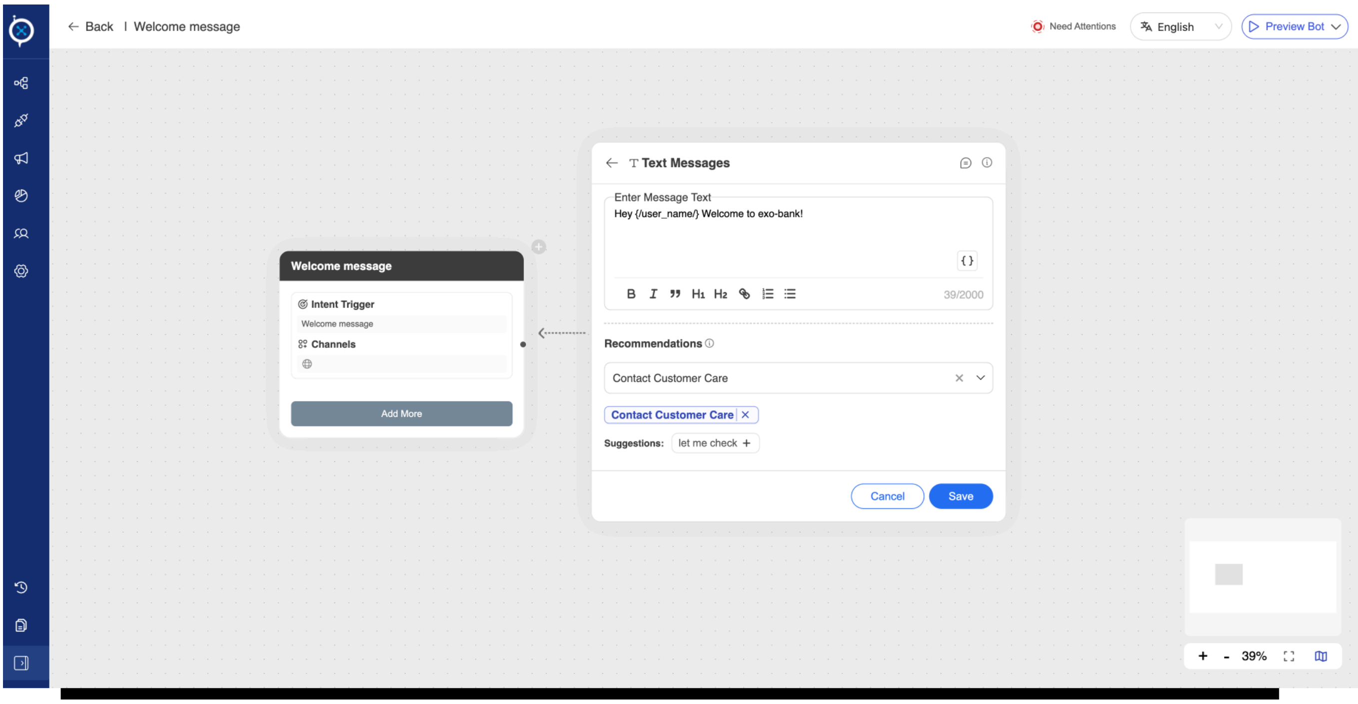
- On the Flow Builder canvas, either click the + icon on an existing node or the Add More button inside a node to add to the current step.

- From the element menu, select the **Bot Messages** category.
- Choose the specific type of message you want to send (e.g., Text, Image, Carousel).



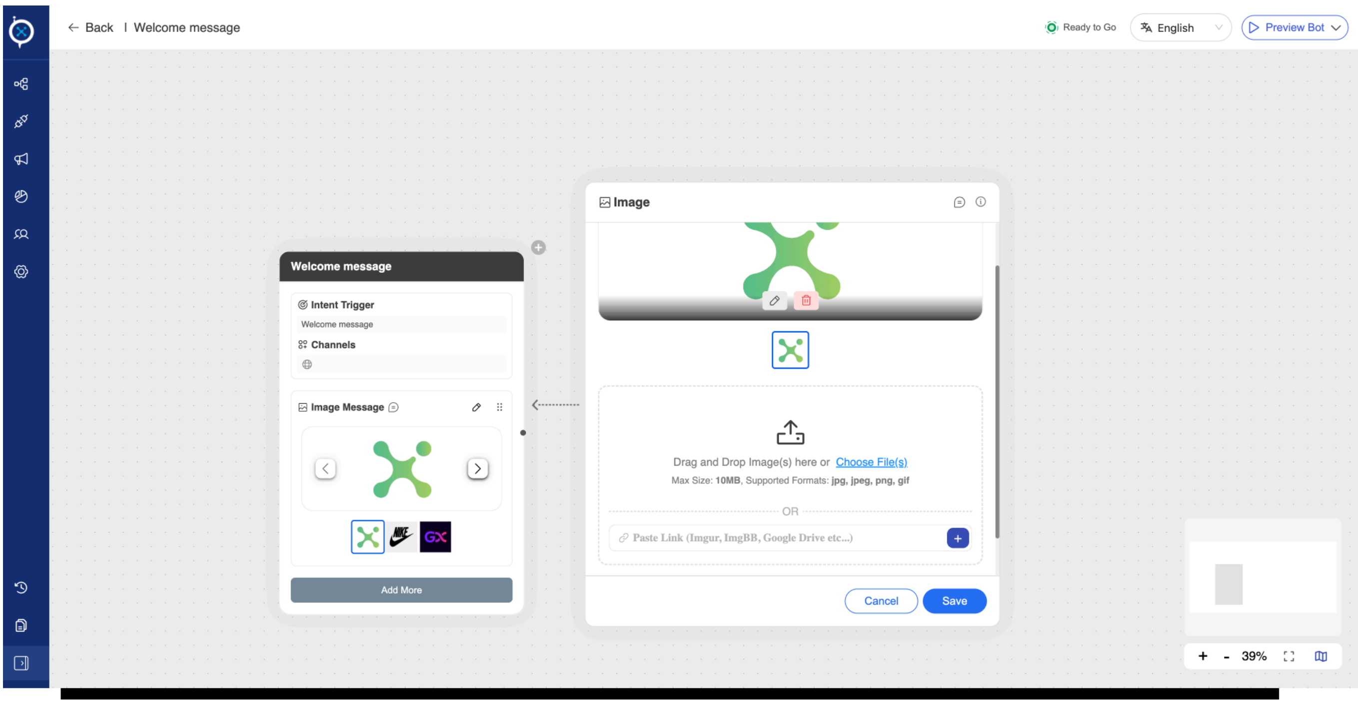
- **2.2 Configuration Details for Each Message Type**

- **Text**
- **Enter Message Text**: Type your message in the text box. You can use the formatting toolbar for **bold**, italics, and headers.
- **Variables**: Insert dynamic data (e.g., a user's name) by using curly braces {} to select a saved variable.
- **Recommendations**: Add quick reply buttons that appear below the text message to suggest the user's next step.



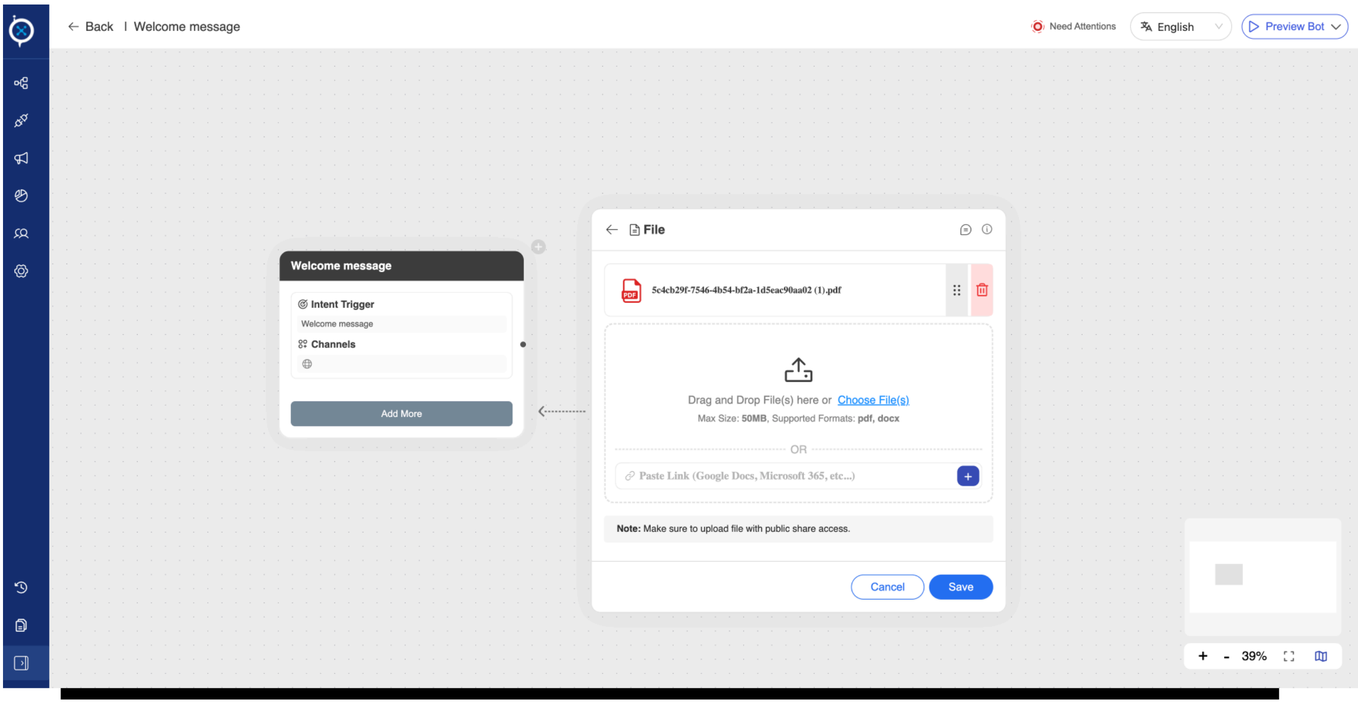
Image

- **Upload**: Drag and drop an image or click **Choose File(s)** to upload from your computer.
- **URL**: Alternatively, paste a publicly accessible image URL.
- **Constraints**: Maximum file size is **10 MB**. Supported formats are jpg, jpeg, png, gif.



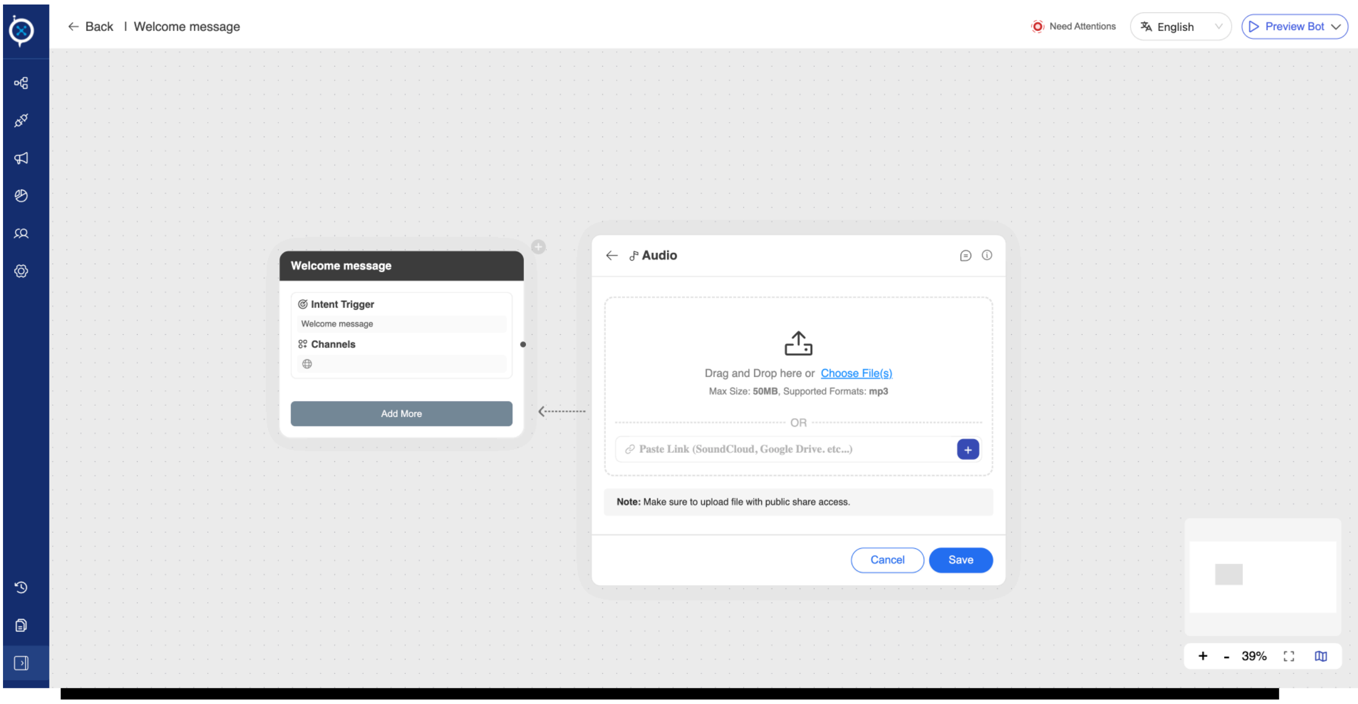
File

- **Upload/URL**: Upload a document or provide a public link.
- **Constraints**: Maximum file size is **50 MB**. Supported formats are pdf, docx.



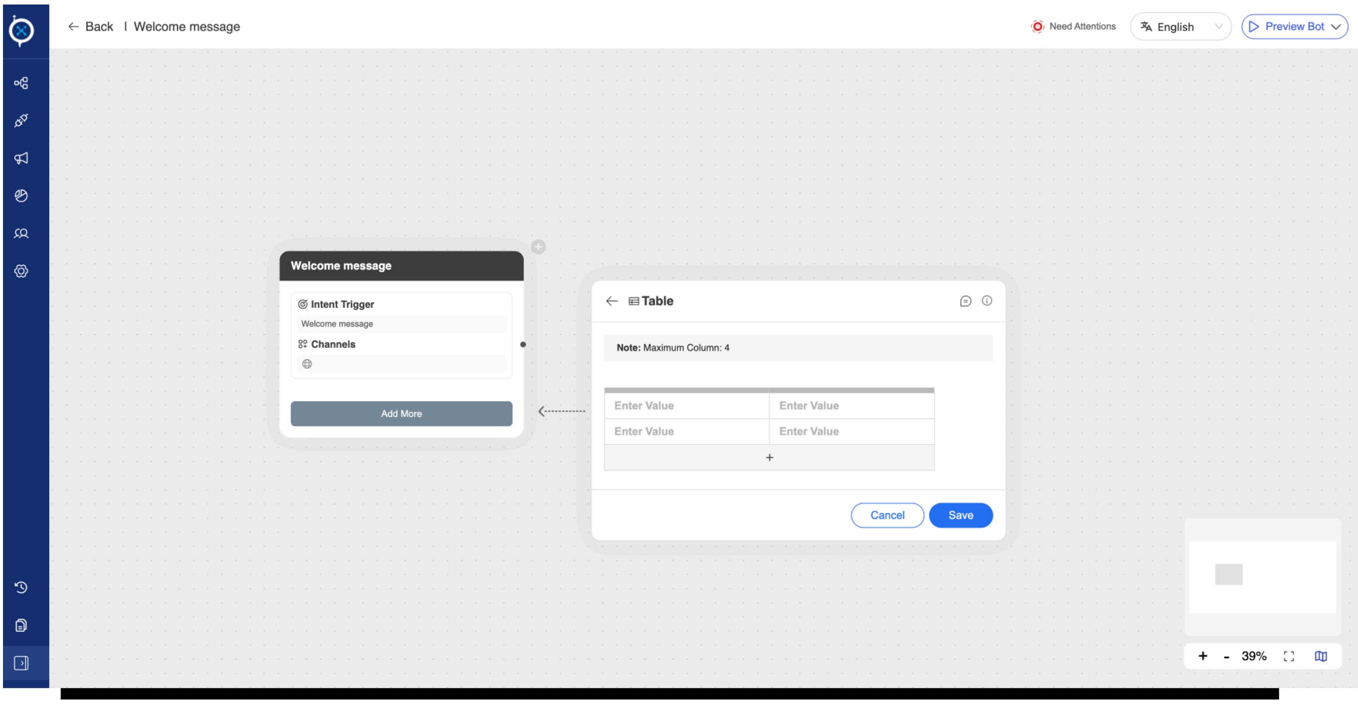
Audio

- **Upload/URL**: Upload an audio file or provide a public link.
- **Constraints**: Maximum file size is **50 MB**. The primary supported format is mp3.



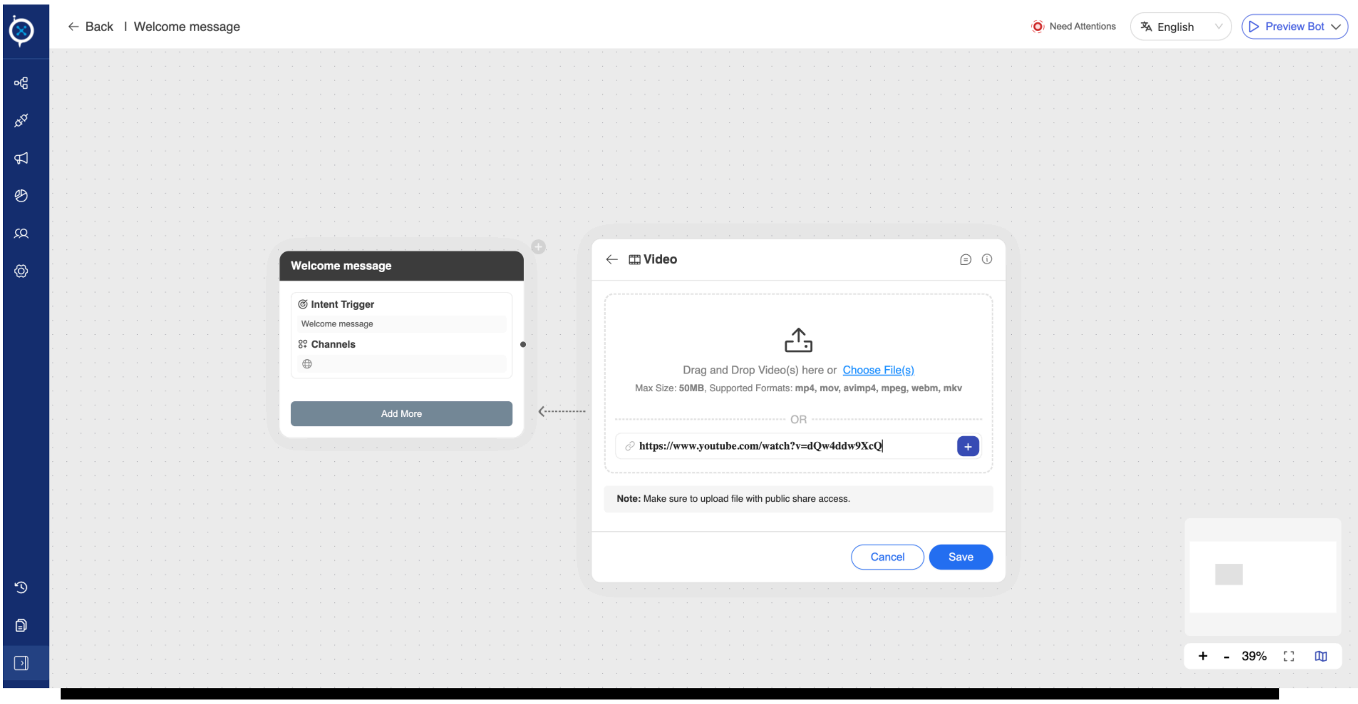
Table

- **Configuration**: Click within the cells to enter values. Use the floating + icons that appear on hover to add new rows or columns.
- **Constraints**: A maximum of **4 columns** is allowed.



Video

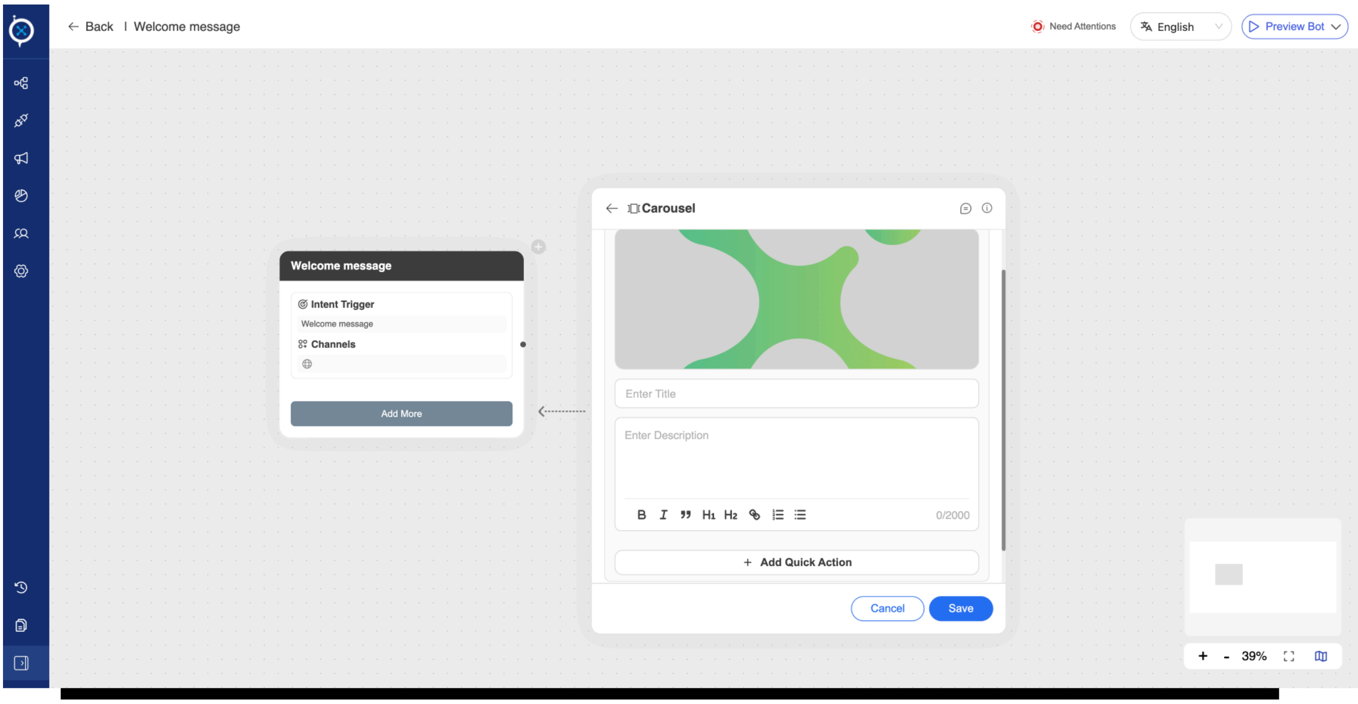
- **Upload/URL**: Upload a video file or provide a public link.
- **Constraints**: Maximum file size is **50 MB**. Supported formats include mp4, mov, avi, mpeg, webm, mkv.



Carousel

The carousel is a powerful element for displaying a list of items. It consists of multiple cards that the user can scroll through horizontally.

- **Card Setup**: For each card, you can upload an image or file (pdf, docx, jpg, etc., up to 50 MB).
- **Enter Title & Description**: Add a title and descriptive text for each card.
- **Add Quick Action**: Each card can have up to two buttons. Configure each button to either:
  - **Open Link**: Redirect the user to an external URL.
  - **Trigger Flow**: Start a different conversation flow when the button is clicked.



Common Use Cases

- **Product Showcase (Carousel)**: Display a catalog of products, where each card shows a product image, its name, and a "View Details" button that triggers a specific flow for that item.
- **Sending a Ticket (File)**: After a user books an event, send them a confirmation message with their ticket attached as a downloadable PDF file.
- **Displaying Business Hours (Table)**: Use a table to clearly show opening and closing times for each day of the week.
- **Video Tutorial (Video)**: When a user asks "How do I set up my account?", respond with a short, helpful video tutorial.
- **Personalized Welcome (Text)**: Greet a returning user with, "Welcome back, {user_name}!" by pulling their name from a variable.

Best Practices

- **Use Rich Media to Enhance Experience**: Don't rely solely on text. Use images, carousels, and videos to make the conversation more engaging and to convey information more effectively.
- **Keep Text Concise**: Break down large blocks of information into multiple, smaller text messages to avoid overwhelming the user.
- **Provide Context for Media**: When you send an image, file, or video, always accompany it with a text message that explains what it is and why the user is receiving it.
- **Optimize for Mobile**: Ensure images and videos are of a reasonable file size to load quickly on mobile devices.
- **Check Your Links**: Double-check that all URLs provided for images, videos, and files are public and not broken.

Common Mistakes

- **Broken Media Links**: Using internal or private URLs for images or files will result in them not displaying for the user. Always use publicly accessible links.
- **Overly Long Carousels**: A carousel with 15-20 cards can be frustrating to scroll through. If you have many items, consider categorizing them and using multiple, smaller carousels or a different approach.
- **Missing a Call to Action**: Sending a carousel of products without any buttons for the user to click ("Quick Actions") is a missed opportunity. Always guide the user on what to do next.**Ignoring Channel Limitations**: A rich, interactive element like a Carousel will look great on the web or Facebook Messenger but will not render on a simpler channel like SMS. Use the Channel Filter logic element to design fallback experiences for different channels.

1.2.1.2.2. Bot Prompts

Overview

Bot Prompts are a core category of interactive elements in the Flow Builder designed for two-way communication, specifically to request and collect information from the user. While "Bot Messages" are for displaying information, Prompts are for gathering it. They pause the conversation flow and wait for the user to provide an input, which can then be validated and stored in a variable for later use.

These elements are critical for building any transactional or data-driven chatbot. They allow you to capture essential details like a user's name, book an appointment by asking for a date, or collect documents for a verification process. The platform offers a wide range of specialized prompts, from simple text inputs to complex, multi-field forms and channel-specific interactive menus.

The available Bot Prompt types include:

- **Basic Inputs**: Text, Name, Phone, Email, PAN, Aadhaar
- **Media Uploads**: File, Video Recording
- **Interactive Choices**: Quick Replies, Confirmation, Choices, WhatsApp List
- **Complex Data Collection**: Form, Calendar, Location, Range Slider
- **Channel-Specific**: WhatsApp Catalogue, WhatsApp Flows, WhatsApp Payments
- **Advanced**: Custom Validator

Using Prompts effectively is the key to creating interactive, personalized, and functional conversational journeys.

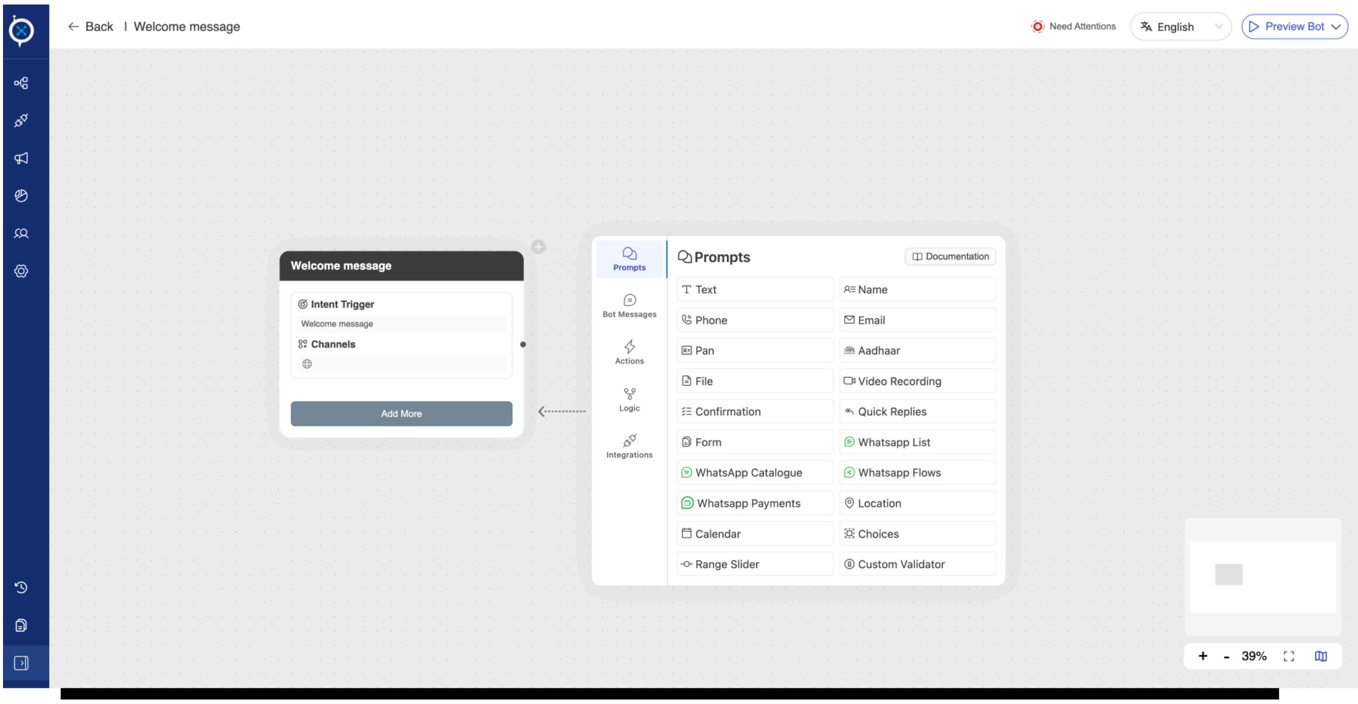
How to Use Bot Prompts

Bot Prompts are added as elements inside a node on the Flow Builder canvas. Once added, a configuration panel appears where you define the prompt's behavior.

2.1 Adding a Bot Prompt

- On the Flow Builder canvas, click the + icon on a node to add a new step.

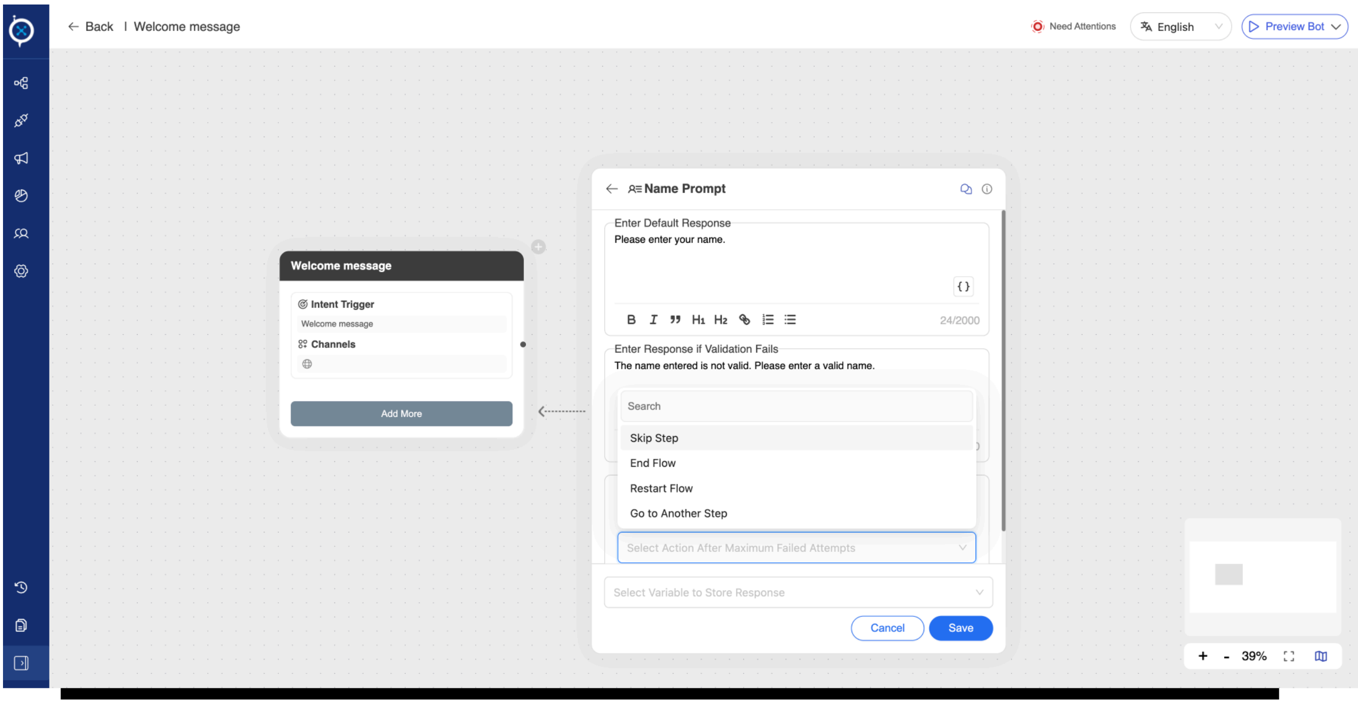
- From the element menu, select the **Prompts** category.
- Choose the specific type of prompt you need (e.g., Name, Form, Calendar).



2.2 Common Configuration Settings

Most prompts share a set of common configuration options:

- **Enter Default Response**: The question or instruction the bot shows to the user (e.g., "Please enter your email address.").
- **Enter Response if Validation Fails**: The error message the user sees if they provide invalid input (e.g., "That doesn't look like a valid email. Please try again.").
- **Maximum Attempts Allowed**: The number of times a user can retry after a validation failure before the flow takes a different path.
- **Action After Maximum Failed Attempts**: If the user fails all attempts, you can configure the flow to **End Flow**, **Restart Flow**, or **Go to Another Step**.
- **Store Response in a Variable**: This is the most crucial step. You must select or create a **Variable** to save the user's input. This allows you to use the collected data later in the flow (e.g., to personalize a message or send to an API).



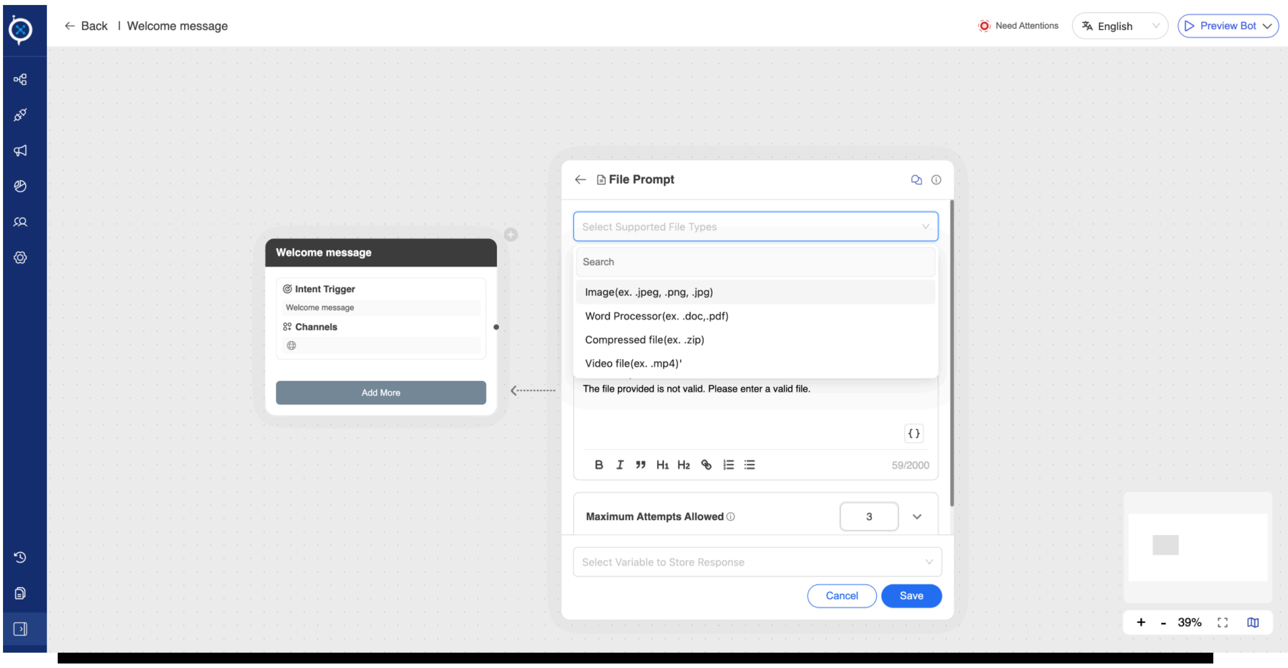
2.3 Details for Specific Prompt Types

Basic Input Prompts (Name, Phone, Email, PAN, Aadhaar)

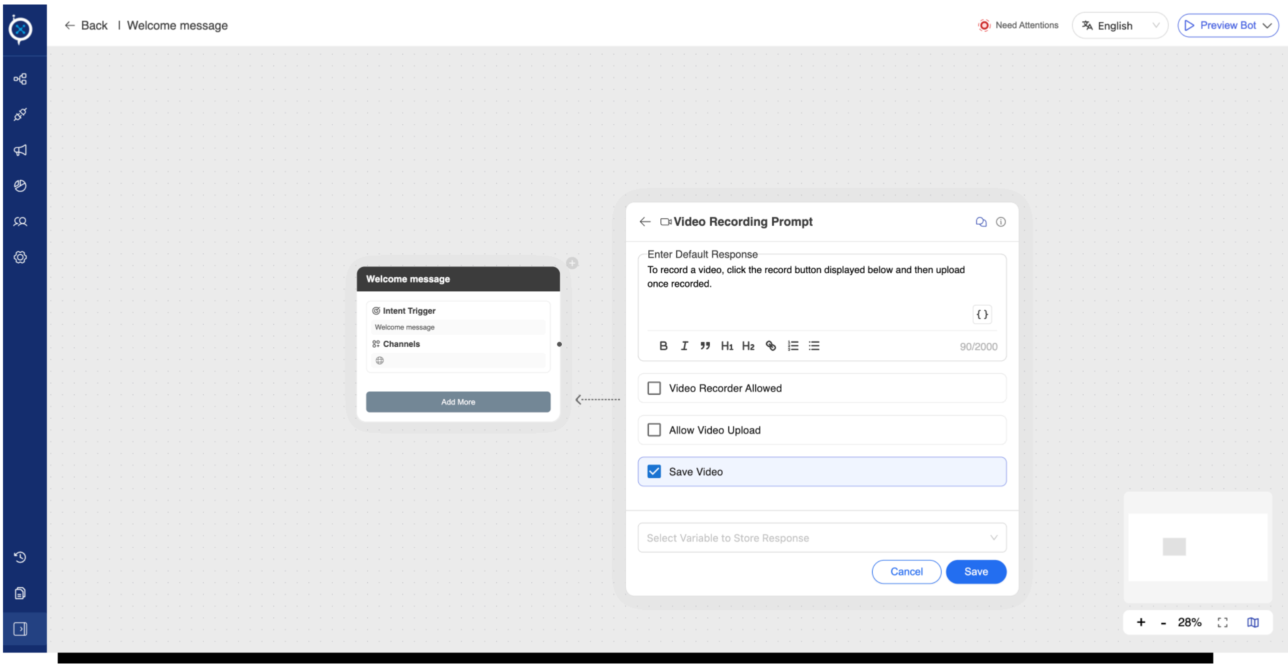
These prompts are for collecting specific text-based information. They each come with pre-built validation to ensure the user's input matches the expected format. The **Phone Prompt** also allows you to set a default country code.

Media Prompts (File, Video Recording)

1. **File Prompt**: Asks the user to upload a file. You can specify the supported file types.

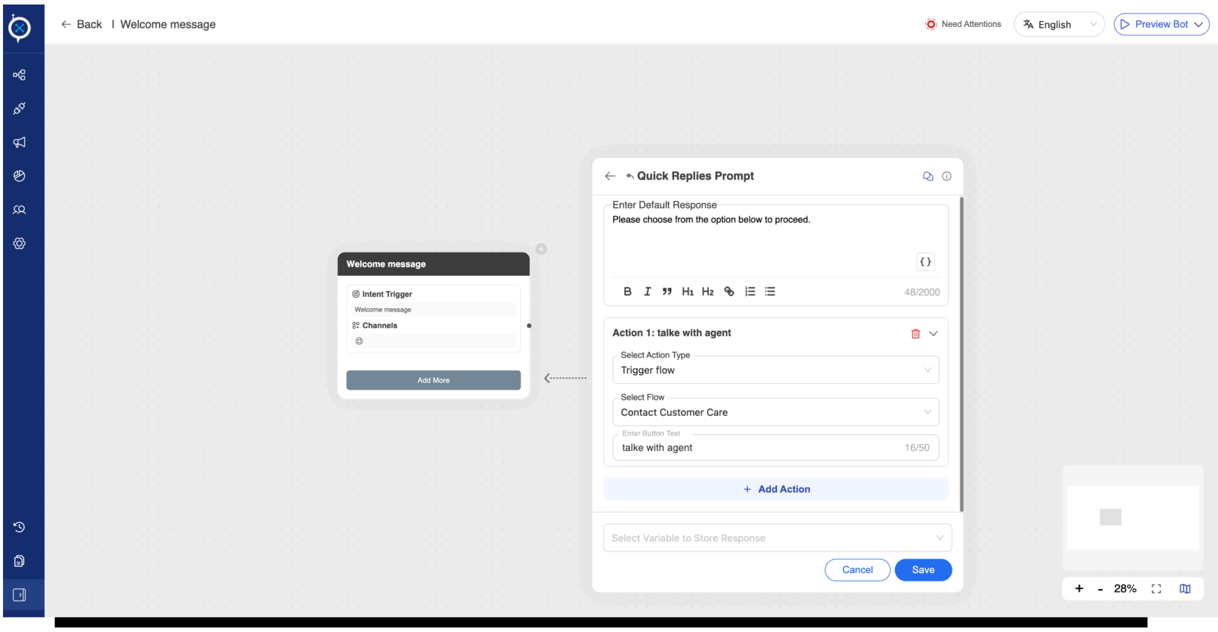


2. **Video Recording Prompt**: Allows the user to either record a video directly in the chat or upload an existing video file.

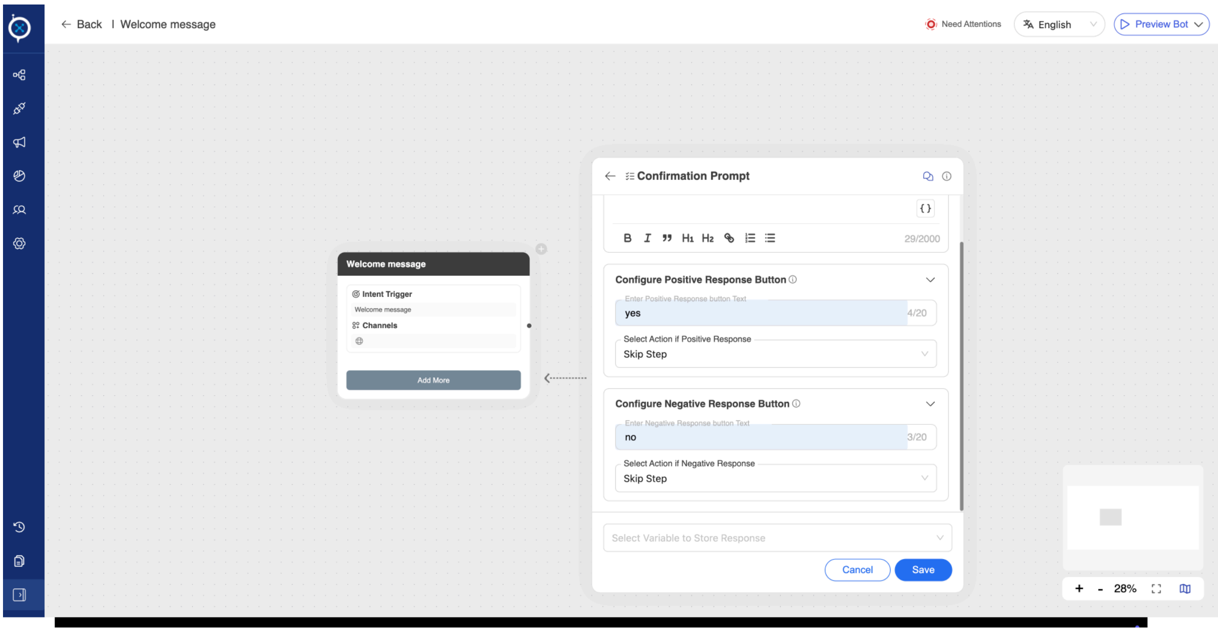


3. **Interactive Prompts**

- **Quick Replies**: Presents the user with a set of buttons. Each button can be configured to trigger a different flow, redirect to a link, or jump to another step in the current flow. This is used for guiding the user's journey.



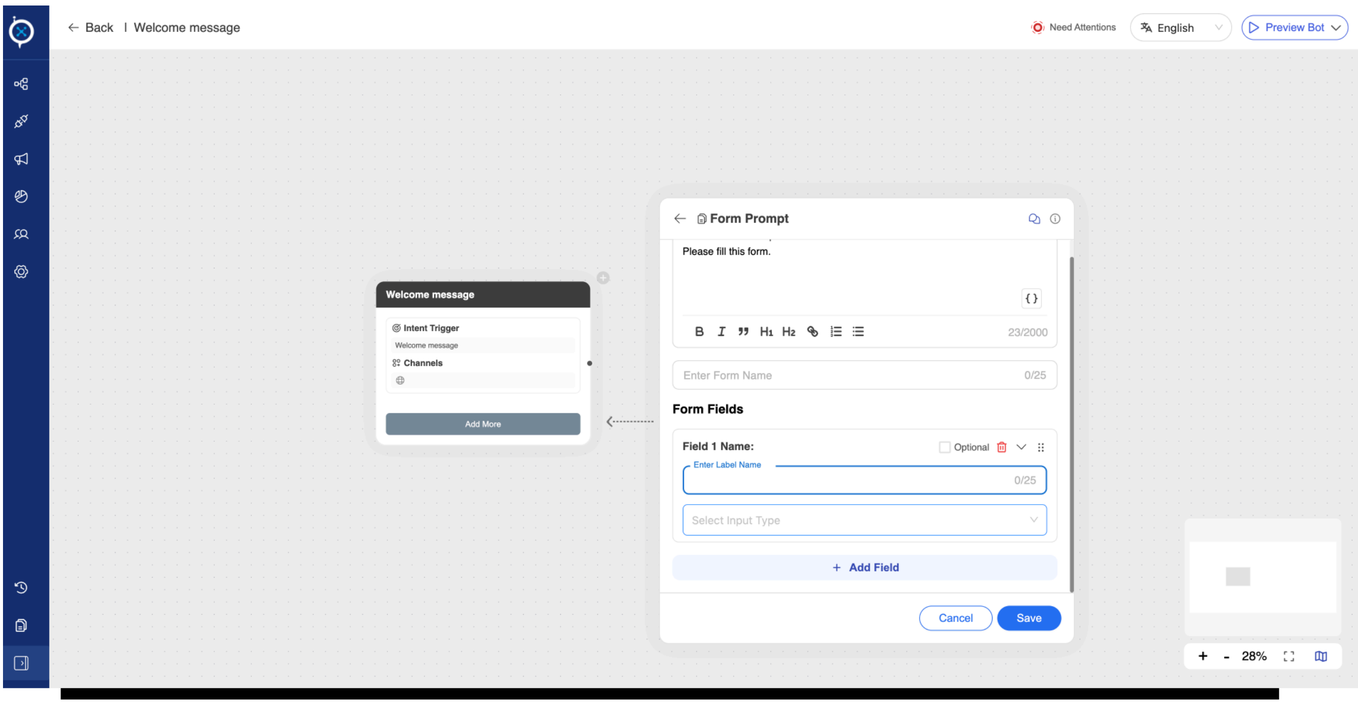
- **Confirmation**: Shows a message with two configurable buttons for positive (e.g., "Yes, Confirm") and negative (e.g., "No, Cancel") responses. Each button can be linked to a different next step in the flow.



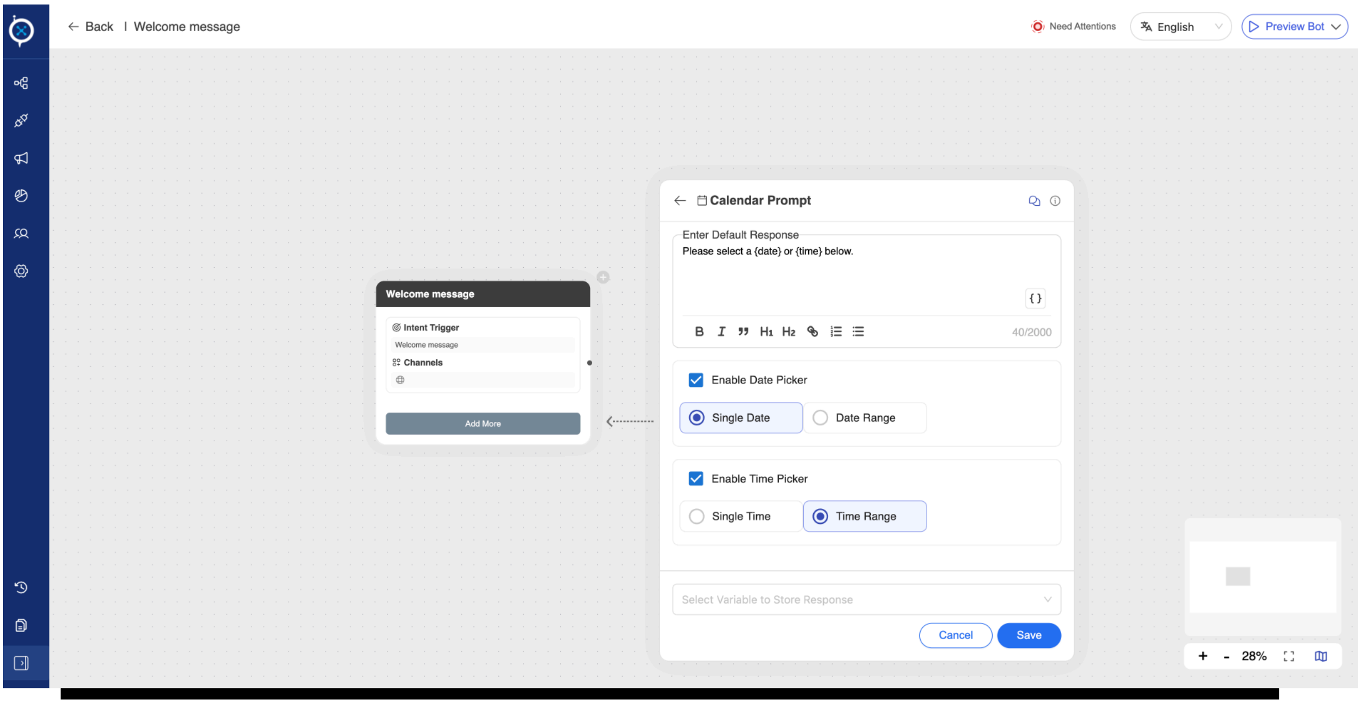
- ◦ **Choices**: Asks the user to select from a list of options presented as **Radio Buttons** (single select), **Checkboxes** (multi-select), or a **Dropdown List** (single select).
- ◦

Complex Data Collection

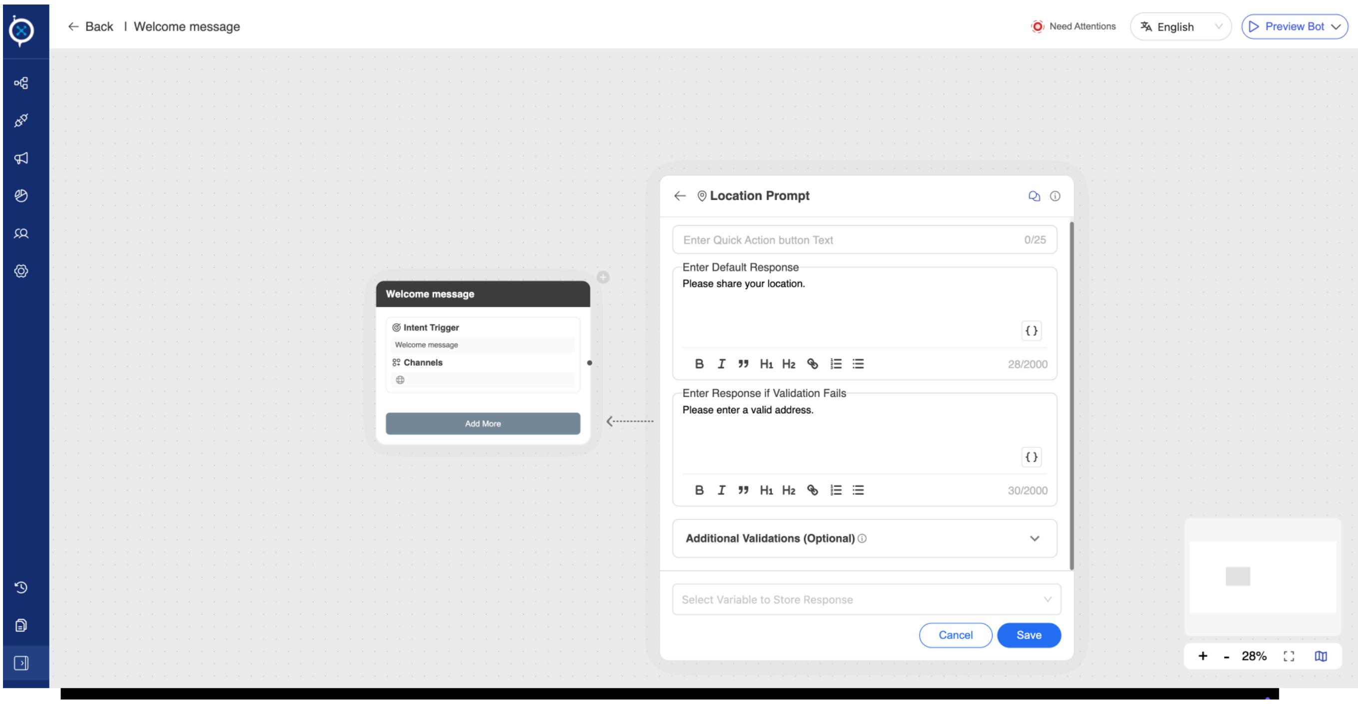
- **Form**: A powerful element for creating multi-field forms. You can add multiple fields, each with its own input type (Text, Choices, Calendar, File Upload, etc.), label, and validator. This is ideal for lead generation or detailed data collection.



- **Calendar:** Displays a date and/or timepicker for the user to select a specific date, a date range, a time, or a time range.



- **Location:** Prompts the user to share their location. You can add validations to accept locations only from specific countries or pincodes.



Common Use Cases

- **User Registration**: Use a series of **Name**, **Email**, and **Phone** prompts to collect user details, storing each in a variable.
- **Customer Feedback Survey**: Use a **Choices** prompt with radio buttons for a rating (1-5) and a **Text** prompt for open-ended comments.

- **Scheduling a Demo**: Use the **Calendar** prompt to let the user pick a preferred date and time.
- **Document Submission**: Use the **File** prompt to ask users to upload a required document, like an ID card for verification.

Best Practices

- **Always Validate Input**: Use the built-in validators for prompts like Email and Phone to ensure you collect clean, usable data.
- **Provide Clear Instructions**: In your "Default Response," be very clear about what you need from the user (e.g., "Please enter your 10-digit PAN number.").
- **Handle Errors Gracefully**: Write helpful and friendly "Validation Fails" messages. Instead of just "Invalid input," say "Oops, that doesn't look like a valid date. Please use the MM/DD/YYYY format."
- **Use Quick Replies to Guide Users**: Instead of open-ended text prompts, use Quick Replies or Choices whenever possible. This reduces user effort and prevents misunderstanding.

Common Mistakes

- **Forgetting to Store the Response**: The most common mistake is configuring a prompt without assigning a variable to store the user's answer. If you don't store it, the data is immediately lost.
- **Not Setting a Failure Path**: Failing to configure the "Action After Maximum Failed Attempts" can leave the user stuck in a loop if they can't provide valid input.
- **Making Forms Too Long**: A form with 10+ fields can be intimidating in a chat interface. Break down long data collection processes into a series of smaller, individual prompts to make it feel more conversational.
- **Using the Wrong Prompt Type**: Don't use a Text prompt when a **Choices** or **Quick Reply** prompt would be more efficient and user-friendly. Match the prompt type to the kind of data you need.

1.2.1.2.3. Actions

Overview

Actions are a powerful category of elements in the Flow Builder that serve as the "engine" of your chatbot's logic. Unlike Bot Messages or Prompts, which are user-facing, Actions work behind the scenes to perform operations, manipulate data, control the conversation's path, and integrate with external systems. They are the crucial link between the conversational interface and your business processes.

Think of Actions as the verbs of your chatbot; they are responsible for doing things. Whether you need to fetch a user's order details from your e-commerce platform, save new lead information to a database, or hand off a complex query to a human agent, you will use an Action element.

The available Action types include:

- **Flow Control**: Execute Flow, Switch Flow, and Delay manage the user's journey through different conversational paths.
- **External Integrations**: API and Transfer to Live Chat connect your chatbot to other software and services.
- **Data Management**: Database, Function, Variables, and Modify Data allow you to retrieve, store, and manipulate information within the conversation.

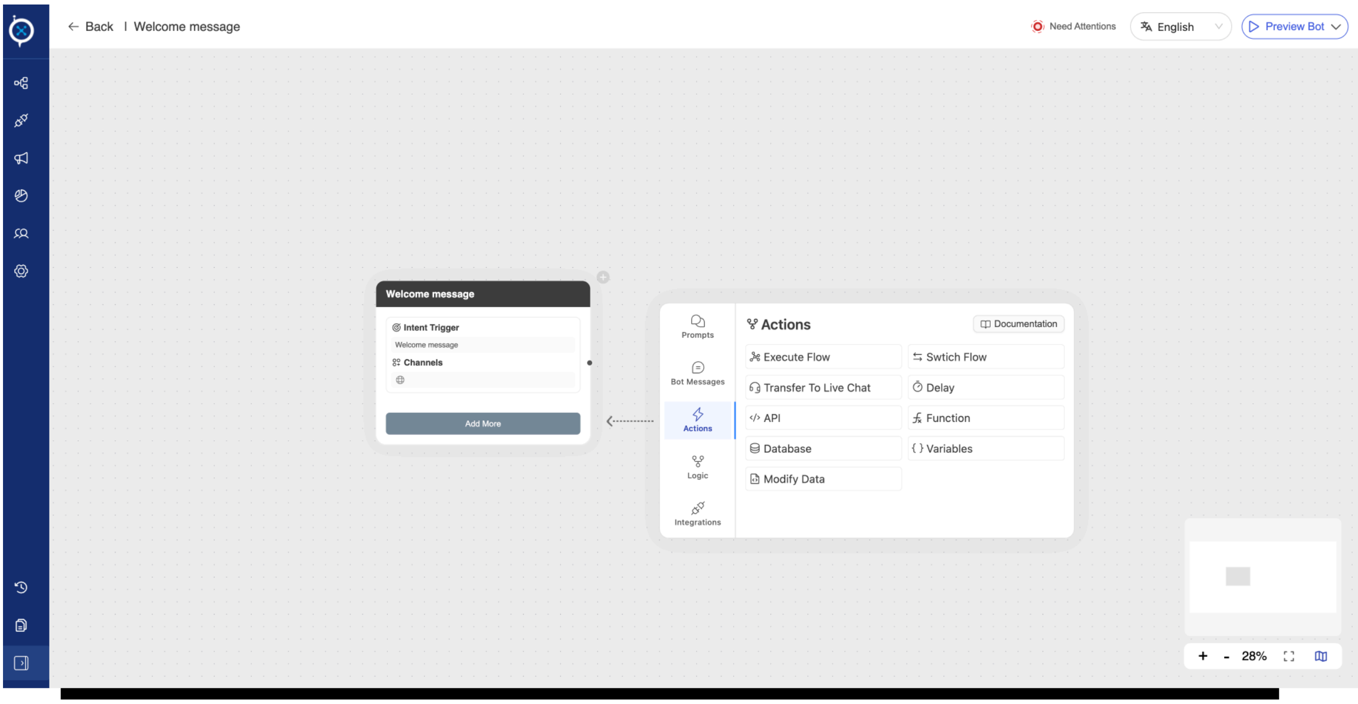
Using these elements effectively is key to building a chatbot that is not just conversational, but genuinely functional and helpful.

How to Use Actions

Actions are added as elements inside a node on the Flow Builder canvas.

2.1 Adding an Action

- On the Flow Builder canvas, click the + icon on a node or the Add More button inside a node.
- From the element menu, select the **Actions** category.
- Choose the specific Action you want to perform (e.g., API, Database).

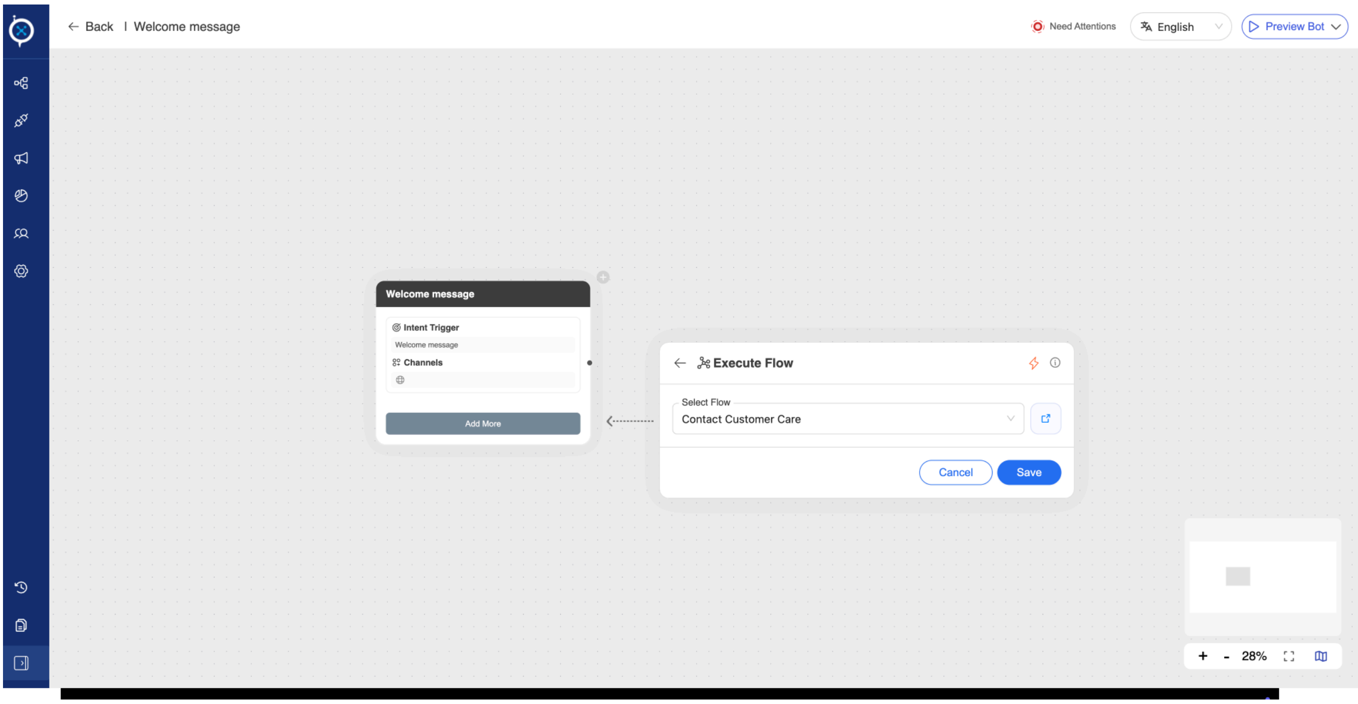


2.2 Configuration Details for Each Action Type

Execute Flow & Switch Flow

These actions control the user's navigation between different flows.

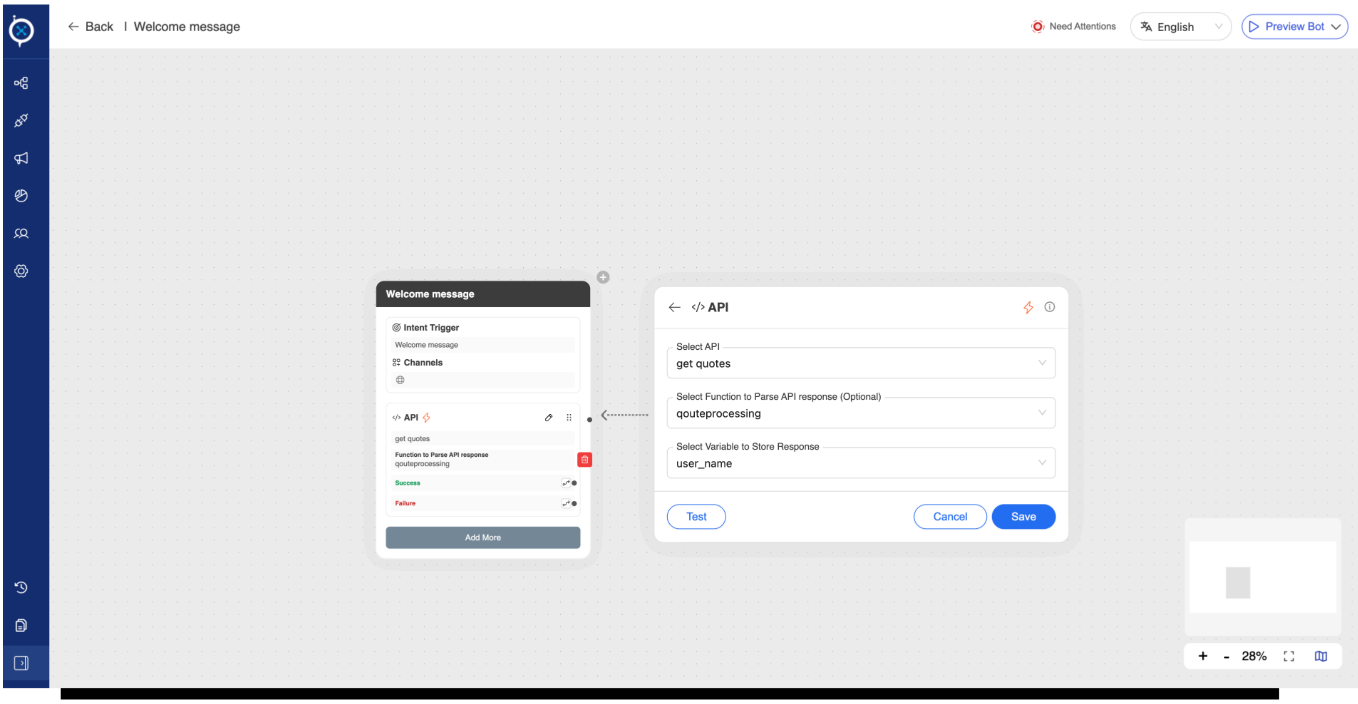
- **Execute Flow**: Temporarily runs another flow (a "sub-flow") and then **returns** to the next step in the original flow once the sub-flow is complete. This is useful for reusable tasks like collecting an address.
- **Switch Flow**: Permanently redirects the user to a different flow, **ending the current one**.
- **Configuration**: For both, simply select the target flow from the dropdown list of all flows in your bot.



API

This action calls an external API that you have pre-configured in the API module.

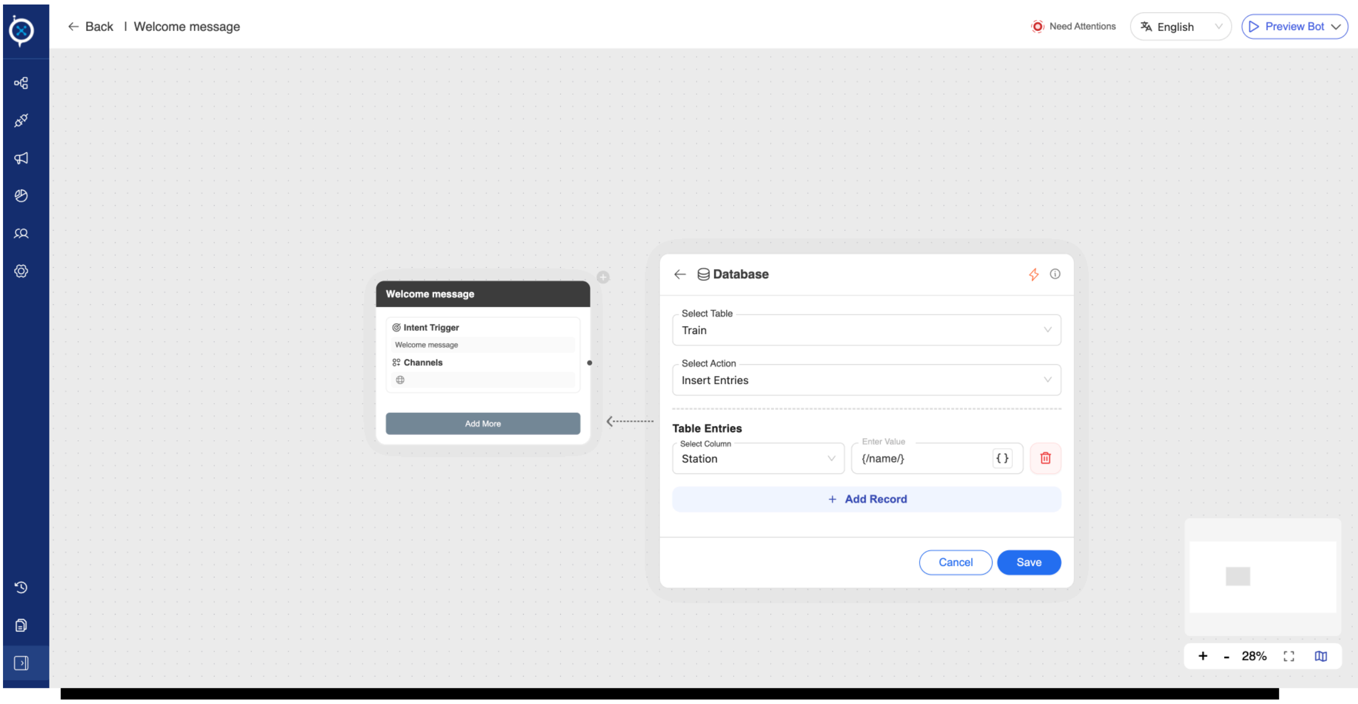
- **Select API**: Choose the desired API call from the dropdown list.
- **Map Variables**: If the API requires input (e.g., a user ID), map the flow variables containing that data to the API's expected input fields.
- **Store Response**: Select a variable where the API's response data will be stored.
- **Connect Paths**: The API element creates two output connectors: Success and Failure. You must connect both to subsequent nodes to handle both possible outcomes.



Database

This action allows you to interact with a table you have created in the Database module.

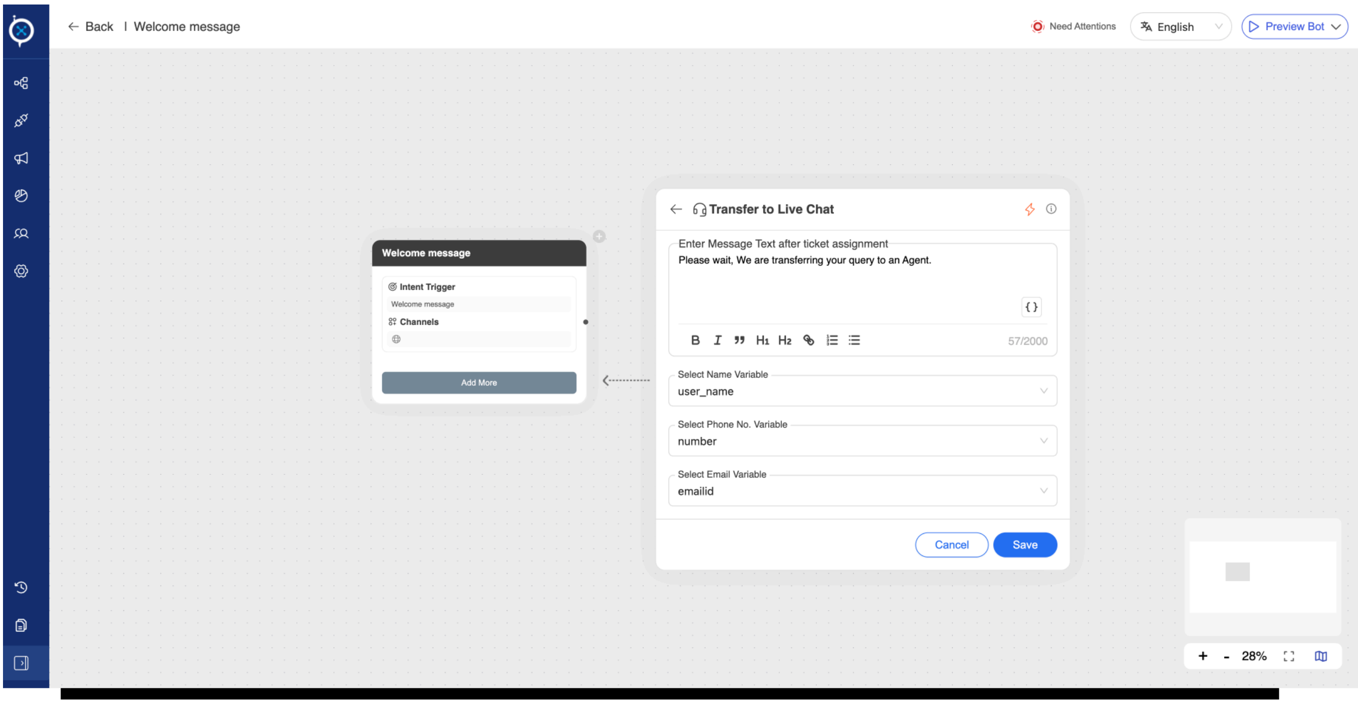
- **Select Table**: Choose the target database table from the dropdown.
- **Select Action**: Choose the operation to perform: Insert Entry, Update Entry, Search Entry, or Delete Entry.
- **Map Columns**: Map your flow variables to the corresponding columns in the table for the operation. For example, for an Insert Entry action, you would map the {user_email} variable to the "Email" column.



Transfer to Live Chat

This action initiates a handoff to a human agent.

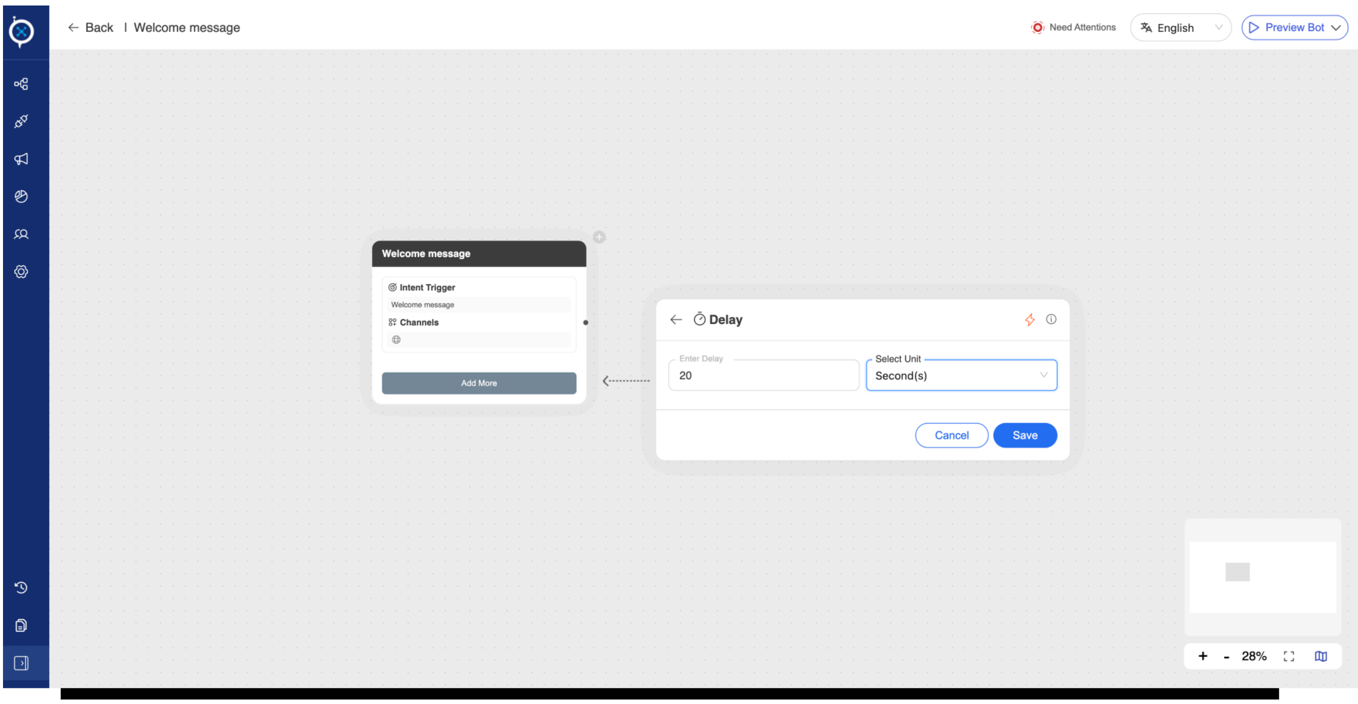
- **Enter Message Text**: Configure the message the user will see while they wait to be connected (e.g., "Please wait while I connect you to an agent.").
- **Map User Details**: Select the variables that hold the user's name, phone number, and email. This information will be passed to the live chat system to give the agent context.



Delay

This action pauses the conversation for a set period, which can make the bot feel more natural.

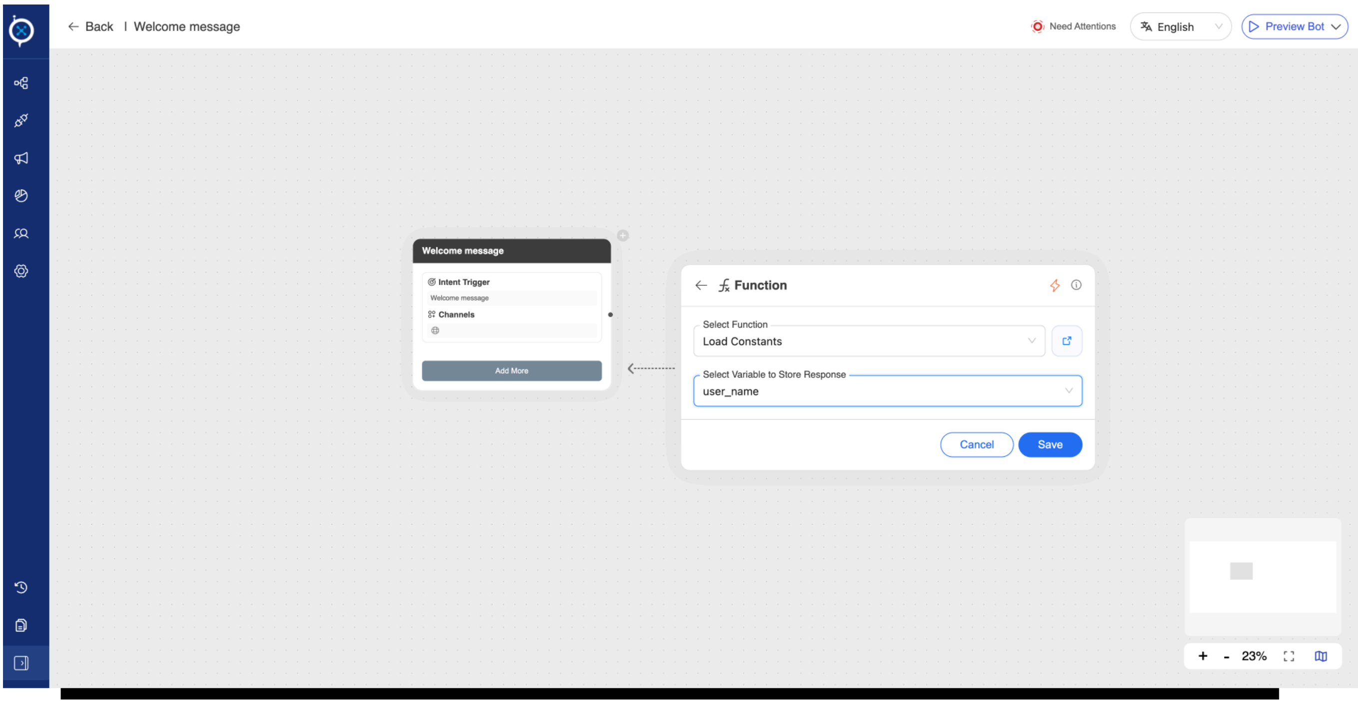
- **Enter Delay**: Specify the duration as a number.
- **Select Units**: Choose whether the duration is in Second(s), Minute(s), or Hour(s).



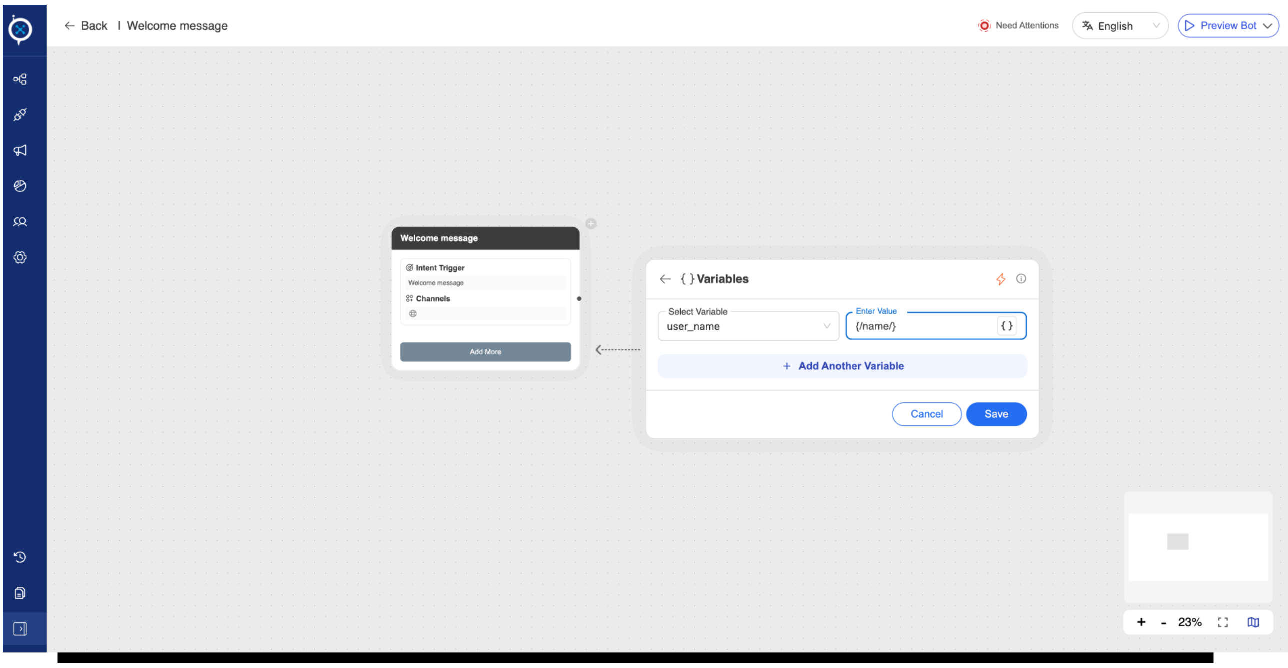
Function, Variables, and Modify Data

These actions are for advanced data handling within the flow.

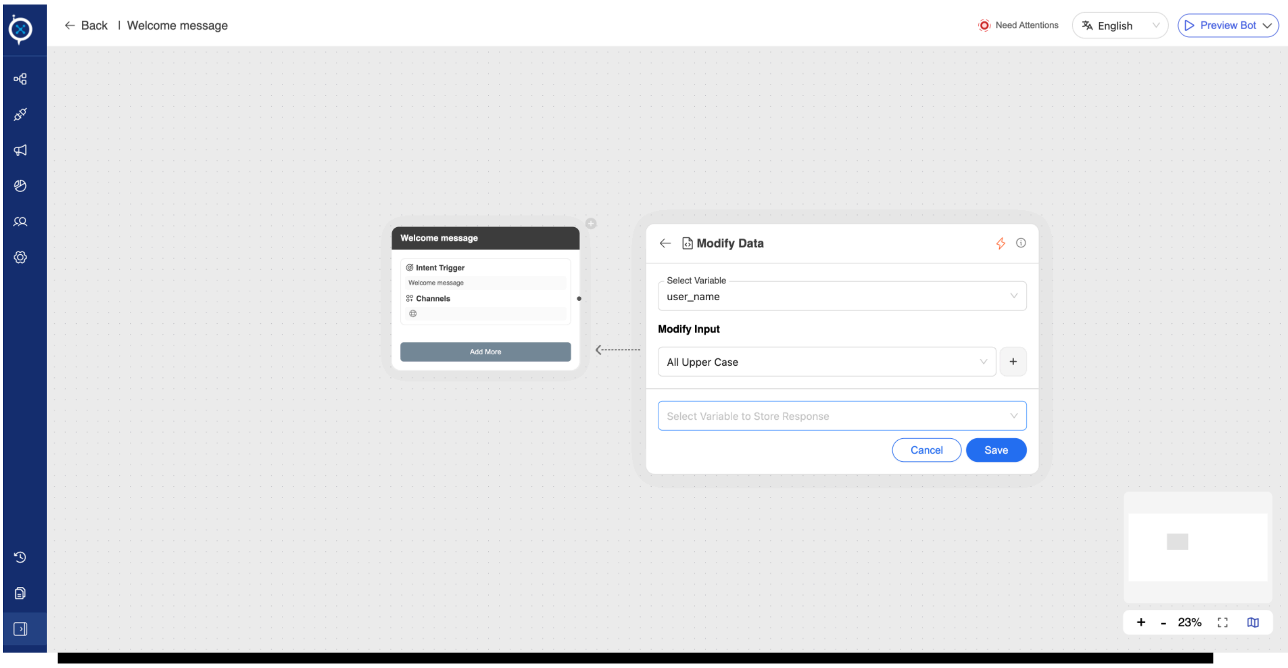
- **Function**: Execute a custom Python script (pre-configured in the Functions module) to perform complex logic.



- **Variables**: Explicitly set or change the value of a variable.



- **Modify Data**: Apply built-in data transformations to a variable (e.g., convert text to uppercase, perform calculations).



Common Use Cases

- **Checking an Order Status (API)**: A user provides their order number, which is stored in a variable. An API action sends this variable to your logistics system and stores the response (e.g., "In Transit") in another variable, which is then displayed to the user.
- **Saving a Sales Lead (Database)**: After a user fills out a contact form, an Insert Entry Database action saves their name, email, and query into a "leads" table.
- **Handling Escalations (Transfer to Live Chat)**: If an API call to resolve a user's issue fails, the Failure path can lead directly to a Transfer to Live Chat action to connect them with a human agent.
- **Modular User Authentication (Execute Flow)**: Create a single, reusable flow for user login. From other flows (like "Check Account Balance" or "Update Profile"), use Execute Flow to run the login flow. Once the user is authenticated, the conversation returns to the original flow.

Best Practices

- **Handle Every Outcome**: Always connect the Success and Failure paths for actions like API and Database. A user should never be left at a dead end if an integration fails.
- **Use Execute Flow for Reusability**: Identify common tasks (like asking for an email or authenticating a user) and build them as separate, small flows. Call them with Execute Flow to keep your main flows clean and easy to manage.

- **Provide Feedback to the User**: Before a potentially slow action like an API call, use a Text message to inform the user (e.g., "Let me check that for you...").
- **Keep Sensitive Data Out of Variables**: Avoid storing highly sensitive information like passwords or full credit card numbers in variables for extended periods. Process and discard them as quickly as possible.

Common Mistakes

- **Confusing Execute Flow and Switch Flow**: Using Switch Flow when you intend to return to the original flow is a common error that prematurely ends the user's journey. Use Execute Flow for temporary tasks.
- **Not Storing API Responses**: Calling an API but forgetting to configure a variable to store the response means you can't use the data you just fetched.
- **Incorrect Variable Mapping**: Sending the wrong variable or incorrectly formatted data to an API or Database action will cause it to fail. Double-check your mappings.

1.2.1.2.4. Logic

Overview

Logic elements are the decision-making components of the Flow Builder. They allow you to create dynamic, intelligent, and personalized conversational paths by directing the user's journey based on specific criteria. While other elements send messages or perform actions, Logic elements control the flow itself, determining which step comes next.

These elements are essential for building chatbots that can adapt to different situations, user inputs, and contexts. Instead of following a single, linear path, a conversation can branch into multiple directions, creating a more responsive and human-like interaction.

The Exo-Chatbot platform provides two primary Logic elements:

- **Condition**: This acts as an "if/else" statement for your conversation. It evaluates the value of a variable and directs the user down different paths depending on whether the condition is met.
- **Channel Filter**: This allows you to tailor the conversational experience for different communication channels (e.g., Web, WhatsApp, Facebook). You can create unique branches to leverage the specific capabilities of each platform.

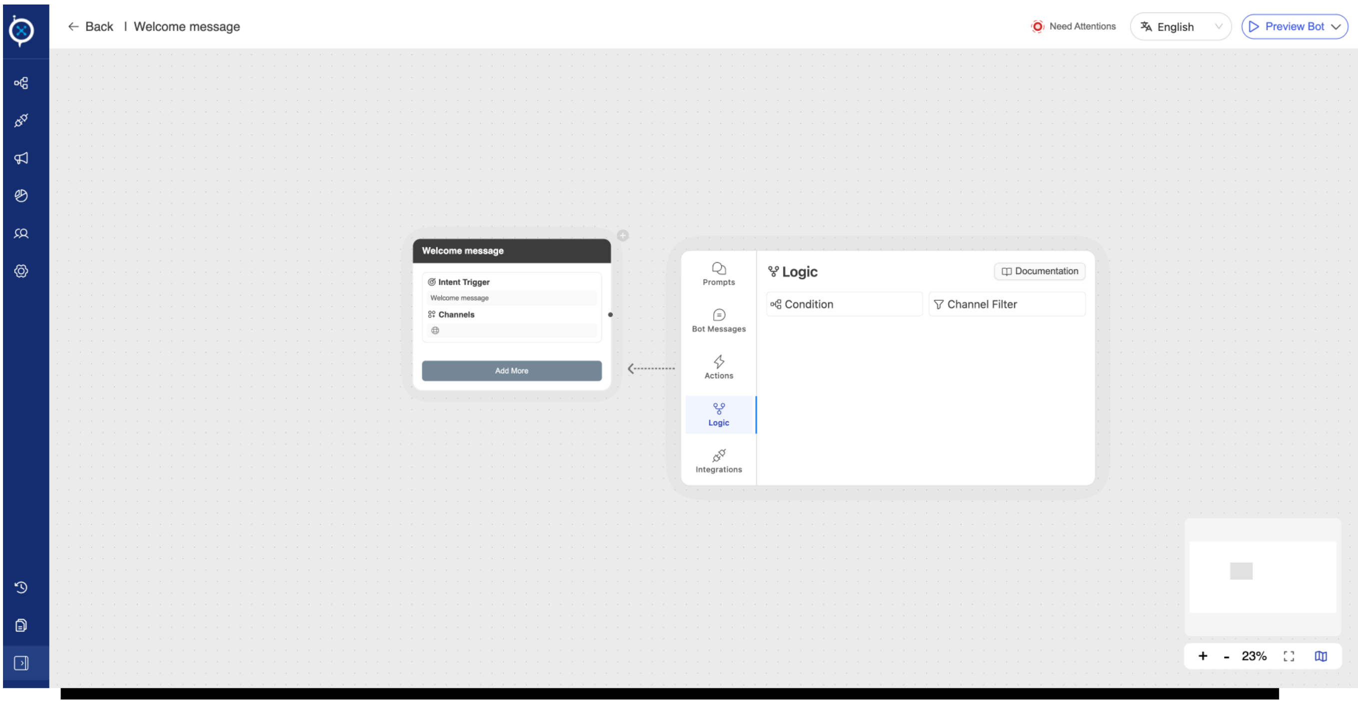
By mastering Logic elements, you move from building simple, static bots to creating sophisticated, context-aware virtual assistants.

How to Use Logic

Logic elements are added inside a node to create branching points in your conversation.

2.1 Adding a Logic Element

- On the Flow Builder canvas, click the + icon on a node where you want the decision to be made.
- From the element menu, select the **Logic** category.
- Choose either **Condition** or **Channel Filter**.



2.2 Configuration Details for Each Logic Type

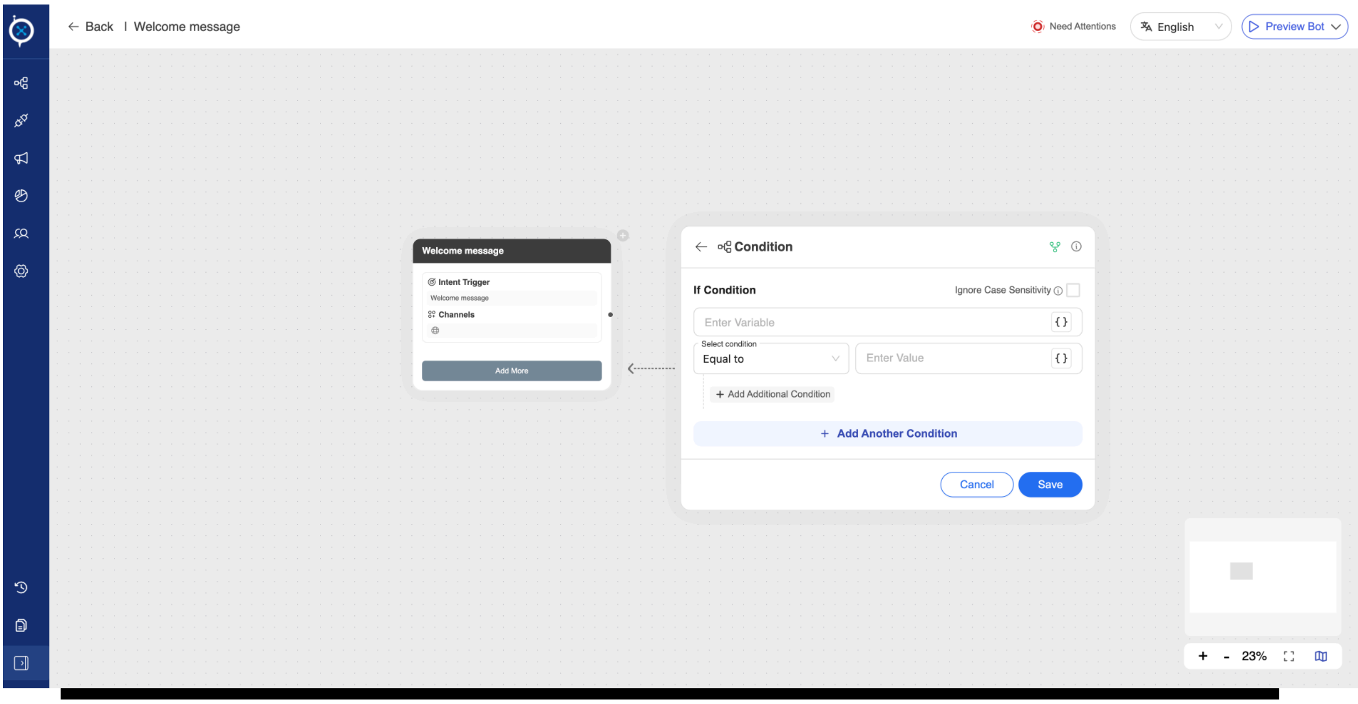
Condition

The Condition element creates If and Else output connectors on your node, allowing you to build branching paths.

- **If Condition**:
    - **Select Variable**: Choose the variable you want to evaluate from the dropdown list.
    - **Select Operator**: Choose the comparison operator (e.g., Equal to, Greater than, Contains, Is not empty).
    - **Enter Value**: Enter the static value or select another variable {} to compare against.

Adding More Conditions:

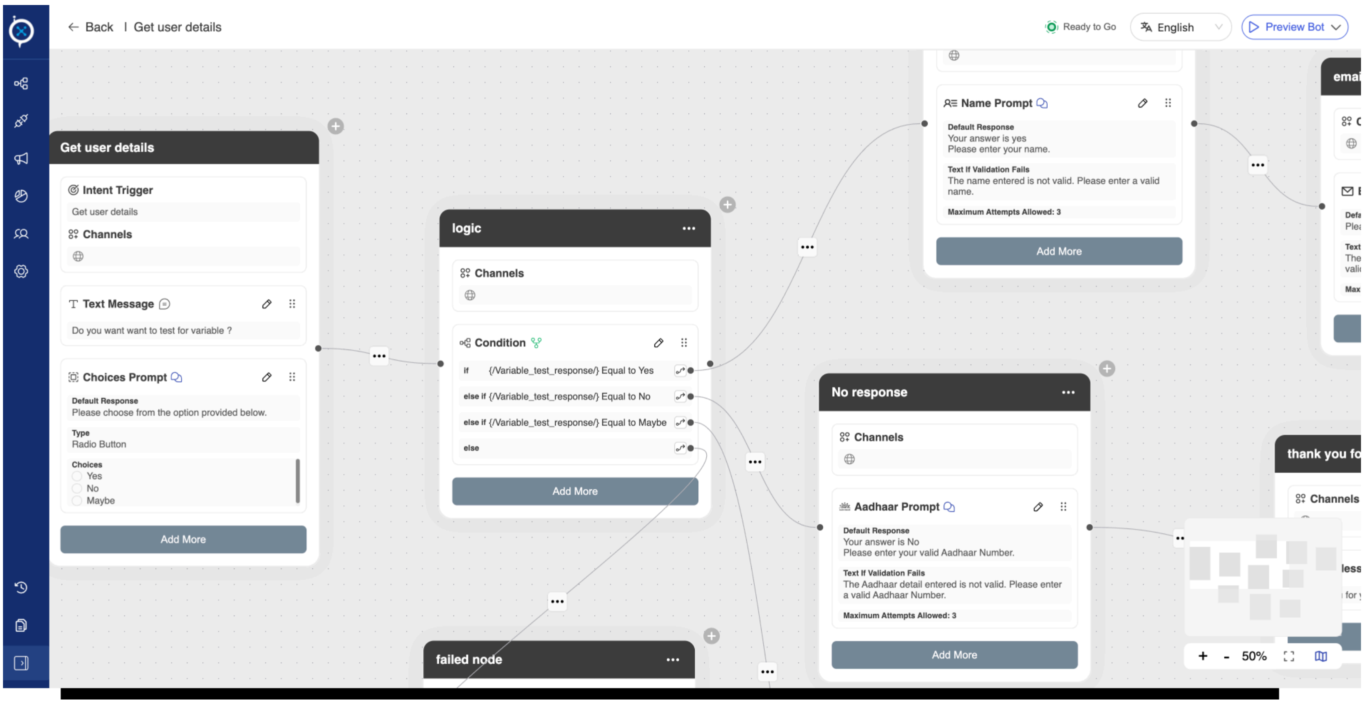
- You can create more complex logic by clicking **+ Add Additional Condition** to create nested AND/OR statements.
- Click **+ Add Another Condition** to create Else If branches, allowing for multiple possible outcomes.



Connecting Paths:

- Drag the connector from the If branch to the node that should execute when the condition is true.

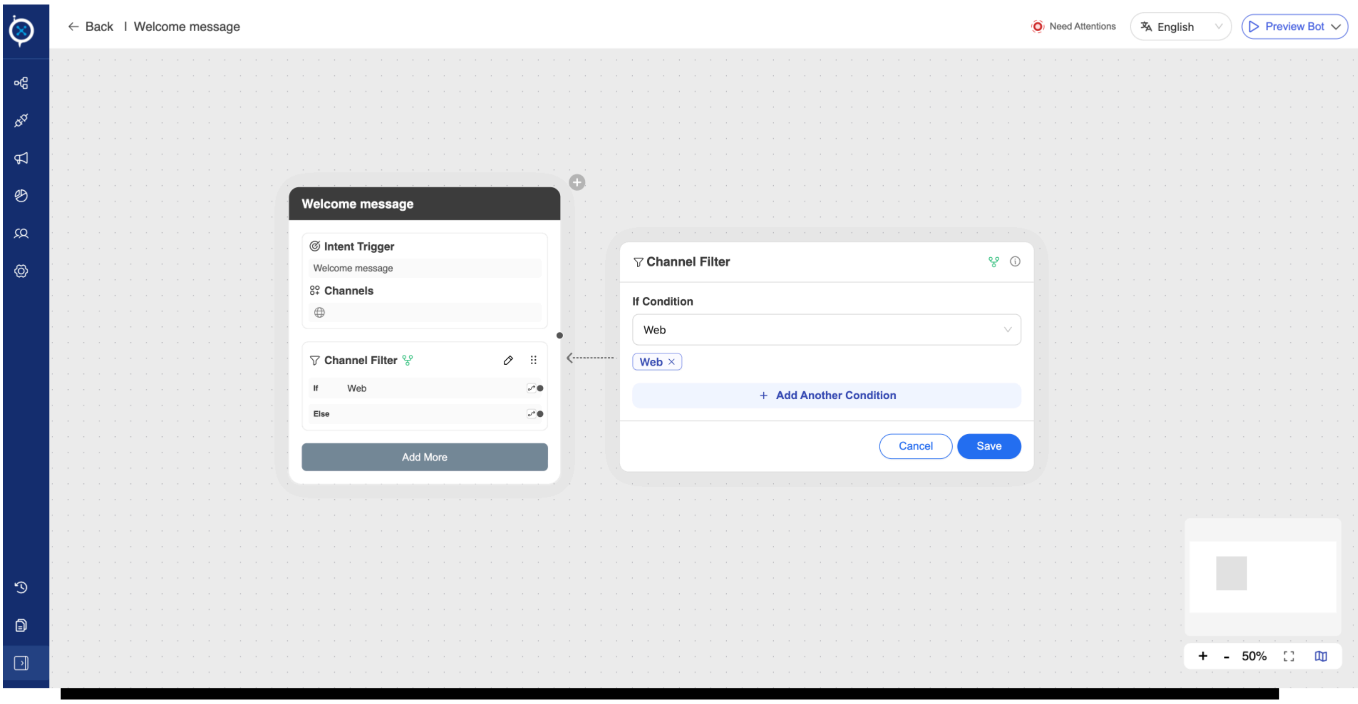
Drag the connector from the Else branch to the node that should execute when the condition is false. You must always connect the Else path.



Channel Filter

The Channel Filter element creates a unique output connector for each channel or group of channels you define.

If Condition: The first branch is created by default. Click the dropdown and select one or more channels (e.g., check the box for Web).



- **Elseif Condition**: Click **+ Add Another Condition** to create a new branch. Select one or more different channels for this branch (e.g., check the box for WhatsApp).

Connecting Paths:

- Connect each channel-specific branch to the node that should execute for that channel.

The Else branch will execute for any channel that you have not explicitly defined a path for. It is crucial to connect this path as a fallback.

Common Use Cases

- **Loan Eligibility Check (Condition)**:
  - An API action checks a user's credit score and stores it in a {credit_score} variable.
  - A Condition node checks: If {credit_score} is Greater than 700.
  - The If path leads to a message: "Congratulations, you are pre-approved!"

    - The Else path leads to a message: "We need a bit more information to process your application."
- **Omnichannel Product Display (Channel Filter)**:
    - A user asks to see product categories.
    - A Channel Filter node directs the flow.
    - The Web and Facebook branch connects to a node with a rich Carousel message, which is highly visual.
    - The WhatsApp branch connects to a node with a WhatsApp List prompt, which is native to that platform.
    - The Else branch (for SMS, etc.) connects to a simple Text message listing the categories.

Best Practices

- **Always Define a Fallback**: For both Condition and Channel Filter, always connect the Else path. This prevents your user from getting stuck if their situation doesn't match any of your specific branches.
- **Keep Conditions Simple**: If you find yourself creating a Condition node with many nested AND/OR statements, consider breaking the logic into multiple, sequential Condition nodes. This makes the flow easier to read and debug.

Common Mistakes

- **Not Handling All Channels**: When using Channel Filter, if you only define paths for Web and WhatsApp but forget the Else path, a user on Facebook Messenger might hit a dead end.
- **Comparing the Wrong Data Types**: Trying to use a "Greater than" operator on a text variable (e.g., If {user_name} is Greater than 100) will not work as expected. Ensure your variable types and operators match.

1.2.1.3. AI Intent Assist

What is AI Intent Assist

AI Intent Assist (AI Intent Detection) improves NLP intent detection using AI. It helps the bot understand user queries more accurately when exact keyword or phrase matches are not found.

This feature will be available for all versions.

> ⚠ AI Intent Assist **does not generate responses**. It only improves intent identification.

How to Enable AI Intent Assist

1. Open your bot
2. Go to **Settings → Solution Settings**
3. Enable **AI Intent Assist**
4. Confirm the behavior in the modal

> **Note**: If the feature might not be available on your bot, please reach out to your respective Account Manager to get it enabled.

How AI Intent Assist Works

AI Intent Assist enhances the existing NLP intent detection by adding an AI-based intent matching layer. It does not replace NLP; instead, it acts as a **secondary detection step** when standard NLP matching fails.

Step-by-Step Flow

1. **Standard NLP Intent Detection**

    - The bot first attempts to detect an intent using the existing NLP engine.
    - This is based on **keyword and phrase matching** from trained intent examples.
2. **NLP Match Fails**
    - If the user query does not contain keywords or phrases similar to the training data:
        - NLP intent detection fails.
        - Without AI Intent Assist, the bot would return a fallback or error message.
3. **AI Intent Assist Re-Attempts Detection**
    - When AI Intent Assist is enabled, the system re-analyzes the user query using AI.
    - The AI compares the user query against **all existing intents** to identify the closest match.
4. **AI-Based Intent Matching**
    - The AI evaluates each intent using:
        - Intent name
        - Training questions
        - Intent description
    - It determines which intent best matches the meaning of the user query, even if the wording is different.
5. **Intent Resolution**
    - If a close match is found:
        - The corresponding NLP intent is triggered.
    - If no suitable match is found:
        - The bot sends a fallback message, or
        - Routes the query to AI Agent flows (if enabled).

What Data AI Intent Assist Uses for Accuracy

AI Intent Assist relies on **existing intent metadata** to determine the closest match. The quality of this data directly impacts accuracy.

1. Intent Name

- Represents the high-level purpose of the intent.

- Used by AI to understand what the intent is meant to handle.

2. Training Questions

- Examples of how users might phrase queries for this intent.
- Used to understand variations in user language and phrasing.

3. AI Description (AI-Assisted Field)

- A descriptive summary of what the intent covers.
- This field is **auto-generated by AI** using the intent name and training questions.
- Users can **review and edit this description before saving**.

```
⚠ This description field is critical for AI Intent Assist accuracy, as it helps AI understand the intent’s scope beyond keywords.
```

Best Practices for Using AI Intent Assist Effectively

To get the best results from AI Intent Assist, follow these guidelines:

1. Use Clear and Meaningful Intent Names

- Avoid vague names like *Intent1* or *GeneralQuery*.
- Use descriptive names that reflect the user’s goal (e.g., *Check Order Status*, *Apply for Credit Card*).

2. Add Diverse and Relevant Training Questions

- Include different ways users might ask the same question.
- Cover common paraphrases, informal language, and partial questions.
- Try to cover synonyms

3. Review and Edit the AI-Generated Description

- Read the auto-generated description carefully.
- Ensure it accurately represents:

    - What the intent should handle
    - What it should **not** handle
- Update it to clarify the scope where needed.
- Do not write more than 2 lines; the more rules and checks in place, the more chances of hallucinations.

4. Test and Iterate

- Test with real-world user queries.
- If the wrong intent is matched:
    - Add more training questions, or
    - Refine the intent description to narrow or expand scope.
- Re-test after every update to improve detection accuracy.

5. Combine with AI Agent for Best Results

- Use AI Intent Assist to improve intent detection.
- Use AI Agent as a fallback where AI will intervene and respond to the user queries:
    - Unstructured queries
    - Long-tail or complex questions
- This provides the most reliable and scalable setup.

How to Test AI Intent Assist

- Test exact intent phrases
- Test paraphrased queries or more complex queries
- Test long or ambiguous questions
- Validate correct intent routing
- Test fallback scenarios when no intent matches

Current Limitations

- AI Agent-first with NLP fallback is not supported
- Rich UI elements are currently handled better in NLP flows

1.2.1.4. Smart Flow Assist (GenAI for NLP)

Introduction

Turn Your Existing Bots into AI-Powered, Human-Like Experiences with a Single Switch

Chatbots were built to follow structured flows, but Users were not.

People type in sentences. They ask questions mid-flow. They change their minds. They provide details in conversational formats. Traditional NLP bots struggle in these situations, often repeating the same question or breaking the flow entirely.

That's exactly why we built **Smart Flow Assist**.

What is Smart Flow Assist?

Smart Flow Assist is an AI-powered enhancement that upgrades your existing NLP bots into contextual, conversational assistants without rebuilding your flows.

It works across all text-based input fields, including:

- Name
- Email
- Phone
- PAN
- Aadhaar
- Custom validations
- And other structured inputs
- Buttons - Quick Reply, Confirmation, & Choices (live by Mid-March)

It intelligently understands user responses, corrects recoverable errors, handles objections, and keeps conversations moving while preserving your existing validations, APIs, and routing logic, and still lets NLP control the flow.

No migration. No redesign. No change in business logic. Just smarter conversations.

How Smart Flow Assist Works

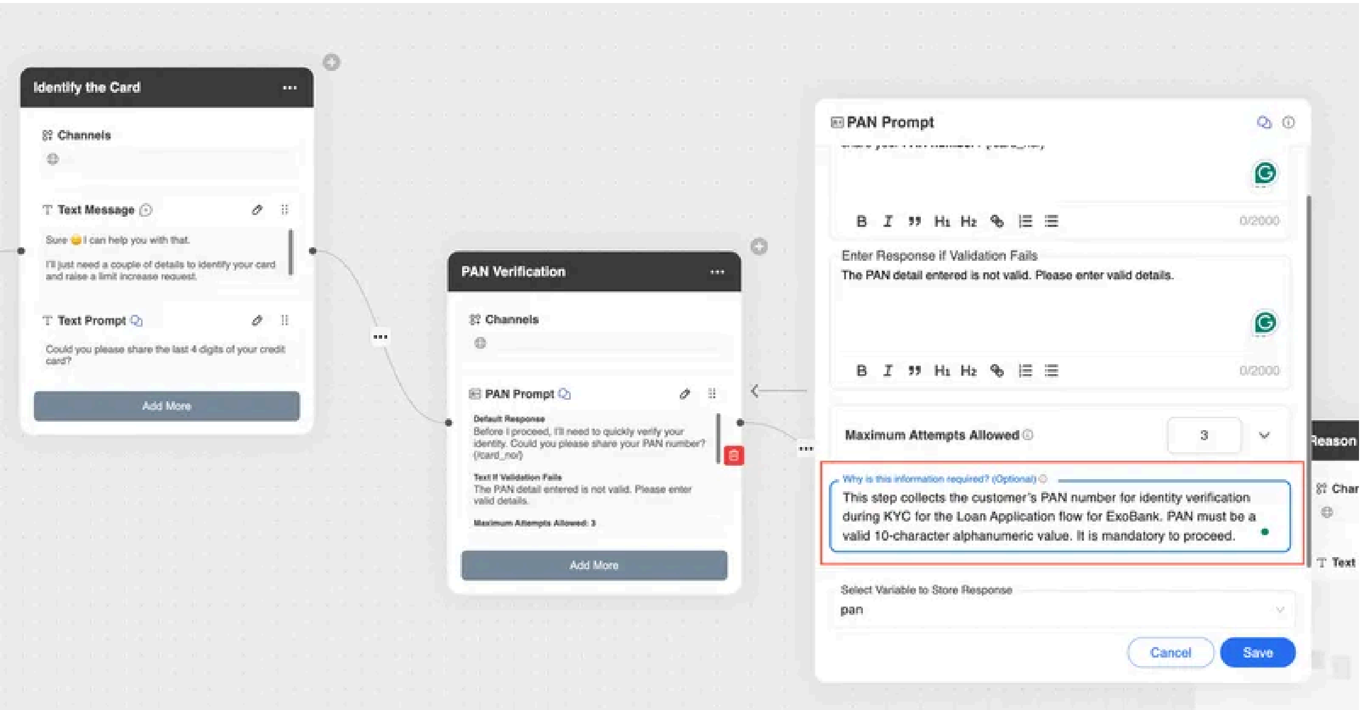
At every step where user input is expected, your bot already has:

- A question message
- A validation logic (regex / API / custom processor)
- A next-step rule

When traditional NLP fails to interpret an input, Smart Flow Assist steps in.

It uses:

- **The bot's message**: The question or message asked by the bot on the current step.
- **The user's response**: The user's message provided to the Bot's message.
- **Why is this information required?**: A Node Description, which is a text input field to be provided while building the bot flows, which has details about what the input is, why it's needed, and how it's validated.



Why is this information required?

The AI then determines whether the input is:

- A recoverable, valid entry (e.g., phone in sentence format, or manually entered entry of a Button text)
- A clarification or objection, or a lost user.
- A context switch to another flow, storing the context, and resuming back
- Or truly invalid

It corrects, explains, routes, or resumes without breaking the journey.

Your deterministic logic remains the primary layer. Smart Flow Assist acts as an intelligent recovery layer.

Before vs After: Real Examples

Example 1: Phone Number Collection

Before

- Bot: “Please enter your phone number with country code.”
- User: “My number is 9876543210.”
- Bot: “Invalid input. Please enter a valid phone number.”

After

- Bot: “Please enter your phone number with country code.”
- User: “My number is 9876543210.”-
- AI extracts the number, applies the default country rule, and continues the flow.

No friction. No repetition.

Example 2: Objection Mid-KYC

Before

- Bot: “Please enter your PAN.”
- User: “Why do you need this?”
- Bot: Repeats the same question or fails.

After

- Bot: “Please enter your PAN.”
- User: “Why do you need this?”
- AI uses configured explanation and responds: “We require PAN for identity verification as part of regulatory compliance.”
- Then continues the flow.

Example 3: Context Switch

Before

- User in Credit Card flow types: “I want to apply for a loan instead.”
- Bot: Invalid input, and ask the same credit flow question.

After

- AI detects context switch.
- Confirms to the user that they are leaving the flow and routing to the Loan flow
  - " I am pausing the current Credit Card Application flow. Please provide your Loan requirement?"
- If the user returns, resumes exactly where they left off.

Feature Walkthrough Video

Smart Flow Assist Walkthrough

Exotel Conversation AI

Watch on

What Has Improved?

Smart Flow Assist enables:

- Intelligent entity extraction from conversational inputs or mistakes.
- Graceful objection handling or user questions about the flows.
- Mid-flow topic switching by acknowledging it to the user.
- Resume from paused journeys by preserving the past details of the session.
- Fewer hard validation failures.
- Reduced drop-offs.

All without modifying your existing flow logic.

Benefits

- Higher completion rates & reduced abandonment.
- More human-like conversations inside the NLP flows.
- Better handling of real-world user behavior.
- No bot rebuild or migration required.
- Instant AI upgrade with a single toggle.

It transforms rigid NLP bots into contextual assistants.

Reporting & Visibility

Smart Flow Assist also comes with built-in reporting.

You can track:

- Total AI interventions
- AI vs NLP handling split
- Valid inputs recovered by AI
- Objections Resolved
- Context switches handled
- Step-level assistance insights

This gives business teams measurable proof of AI-driven improvement and how they can improve the existing NLP bots.

Availability & Limitations

- Currently available for all text-based input fields on the v8 console on bots.exotel.com for a trial period.
- Customer bot rollout is in progress for v8 & v7
- Interactive components (Buttons and Choices) are being launched by March.
- Supported across:
  - Web
  - Android
  - iOS
  - WhatsApp

Limitations:

- Does not override business logic or API validation.
- Does not change flow routing rules.
- Acts only as an intelligent assist layer.

How to Use Smart Flow Assist Effectively

The most important step is configuring the **Why is this information required?** (Node Description) field properly.

- For every input step, provide a short 2-3 line explanation that covers:
  - What is this step for and for which use case or flow?
  - What information is being collected?
  - Why is it required?
  - Any validation rules that apply?
- Keep it concise and clear.
- The better the description, the better the AI performs.
- **Example**:
  - “This step collects the customer’s PAN number for identity verification during KYC for the Loan Application flow for ExoBank. PAN must be a valid 10-character alphanumeric value. It is mandatory to proceed.”

The Bigger Picture

- Smart Flow Assist doesn’t replace your NLP engine. It enhances it.
- It bridges the gap between structured automation and real human conversation.
- With one switch, your bots become smarter, contextual, and more resilient, ready to handle how users actually behave.

1.2.1.5. Database

Overview

The **Database** is an integrated feature within the Exo-Chatbot platform that allows you to create, manage, and utilize custom tables to store and retrieve persistent information. It acts as the chatbot's memory, enabling you to save data collected from users during a conversation and use it in subsequent interactions or for offline analysis.

This feature is essential for building dynamic, data-driven conversational flows. Instead of losing information once a conversation ends, you can store it in a structured way. The Database is directly accessible from the Flow Builder through the "Database" action element, allowing you to perform common database operations like inserting, updating, searching for, and deleting records as part of a user journey.

Key capabilities of the Database module include:

- **Custom Table Creation**: Define your own tables with custom columns and data types (e.g., String, Integer, Boolean).
- **Manual and Bulk Data Entry**: Add records one by one through the console or upload data in bulk using a CSV file.
- **Flow Builder Integration**: Seamlessly connect your conversation flows to your tables to read and write data in real-time.
- **Data Management**: Search, edit, delete, and export table data directly from the user-friendly console interface.

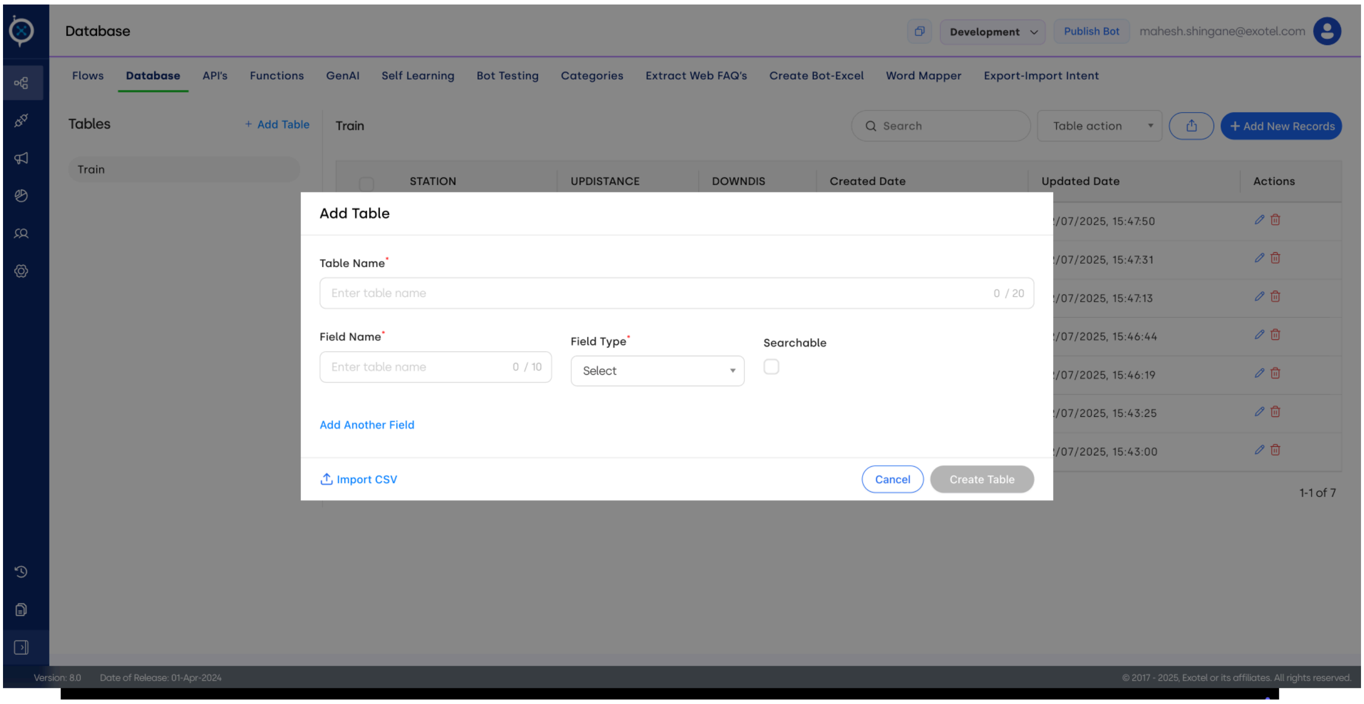
How to Use Database

This guide details how to create and manage tables within the Database module and how to connect them to your conversation flows.

2.1 Navigating to and Creating a Database Table

- From the main console menu, navigate to **Workflow -> Database**.
- If no tables exist, click the **+ Add Table** button. This will open the "Add Table" configuration panel.

- **Define the Table Structure**:
  - **Table Name**: Enter a name for your table (e.g., customer_leads). Note: Use lowercase letters and underscores instead of spaces.
  - **Field Name**: Enter the name for your first column (e.g., user_name).
  - **Field Type**: Select the appropriate data type from the dropdown (e.g., String, Integer, Date).
  - **Searchable**: Check this box if you want to be able to search the contents of this column from the database interface.
  - Click **Add Another Field** to add more columns as needed.
- **Create the Table**: Once all columns are defined, click **Create Table**.
- **(Alternative) Import from CSV**: You can also create a table by clicking **Import CSV**, which allows you to upload a CSV file. The system will create a table with columns matching the headers in your file.

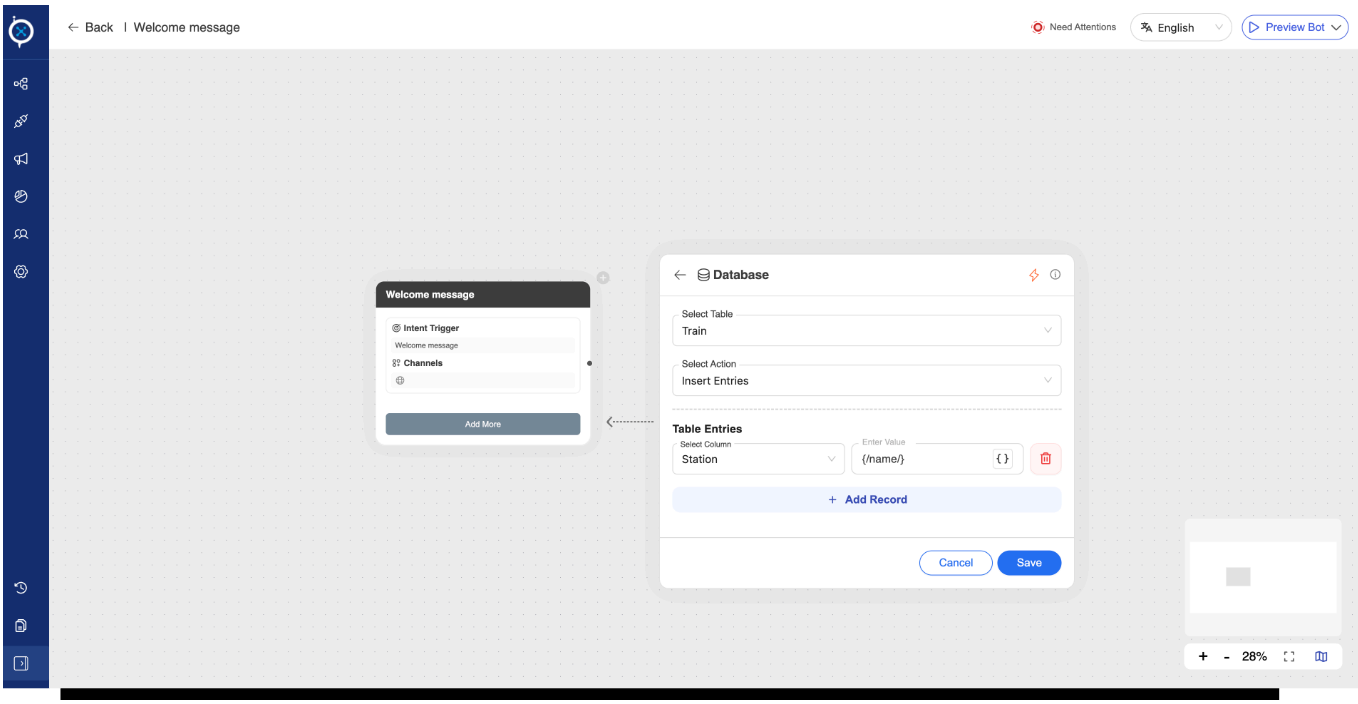


2.2 Managing Table Data

- **Navigation**: **Workflow -> Database**. Select the table you wish to view from the list on the left.**Add a Record**: Click the **+ Add New Records** button to manually add a new row to the table.**Edit/Delete a Record**: In the table view, use the pencil (Edit) or trashcan (Delete) icons in the **Actions** column for each row.**Search**: Use the **Search** bar to find records. This only works for columns that were marked as "Searchable" during creation.**Export**: Click the **Export sheet** icon to download the entire table's contents as a CSV file.

2.3 Using the Database in the Flow Builder

- In the Flow Builder, add a new step and select the **Actions** category.
- Choose the **Database** element.
- **Select Table**: From the dropdown, choose the table you want to interact with.
- **Select Action**: Choose the operation you want to perform:
    - **Insert Entry**: To add a new row. Map the table columns to the variables where you stored the user's input (e.g., map the user_name column to the {name_variable}).
    - **Update Entry**: To modify an existing row (requires a search condition).
    - **Search Entry**: To look up a record.
    - **Delete Entry**: To remove a row.



Common Examples and Use Cases

- **Lead Generation**: A flow asks a user for their name, email, and phone number using **Prompts**. An **Insert Entry** action then saves this information into a leads table.
- **Saving User Preferences**: A user specifies their communication preference (e.g., "Email"). This choice is saved to a user_profiles table and can be retrieved in future conversations.

- **Checking Application Status**: A flow asks a user for their application ID. A **Search Entry** action looks up that ID in a pre-populated applications table and returns the status to the user.
- **Product Information Lookup**: Create a table with product details (name, price, features). A bot can search this table to answer specific user questions about a product.

Best Practices

- **Plan Your Schema**: Before creating a table, plan the columns and their data types. Mismatched data types (e.g., trying to save text in an Integer column) will cause errors.
- **Use Descriptive Names**: Use clear and logical names for your tables and columns (e.g., user_email instead of ue). This makes them easier to manage in the Flow Builder.
- **Make Necessary Fields Searchable**: Only enable the "Searchable" option for columns you will genuinely need to search frequently, like user_id or email, to maintain good performance.
- **Use Variables**: Always store user input in variables first, and then use those variables to perform database actions. This keeps your logic clean and easy to debug.

Common Mistakes

- **Incorrect Naming**: Using a table or column name in the Flow Builder that doesn't exactly match the name in the Database will result in an error. Names are case-sensitive.
- **Forgetting to Create the Table First**: Trying to use the Database action in a flow before the table has been created in the Database module will fail.
- **Data Type Mismatch**: Attempting to insert a value of the wrong type into a column (e.g., saving the text "five" into a column defined as an Integer).
- **Assuming All Columns are Searchable**: Trying to search a column that was not marked as "Searchable" during creation will yield no results.

Note: This module is available on version 8 and onwards.

1.2.1.6. API Library

Overview

The **API (Application Programming Interface)** integration feature is a powerful component of the Exo-Chatbot platform that allows your chatbot to connect with and exchange data with external systems, services, and applications. It acts as a bridge, enabling the bot to go beyond its pre-defined knowledge to fetch real-time information, trigger actions in other software, and deliver dynamic, personalized user experiences.

This module is designed to handle REST APIs, supporting standard HTTP methods such as GET, POST, PUT, DELETE, and PATCH. From a central API Library, you can add, configure, and test all your API endpoints without writing extensive code. Once an API is saved in the library, it can be easily inserted into any conversation flow using the "API" action element in the Flow Builder.

Key capabilities of the API module include:

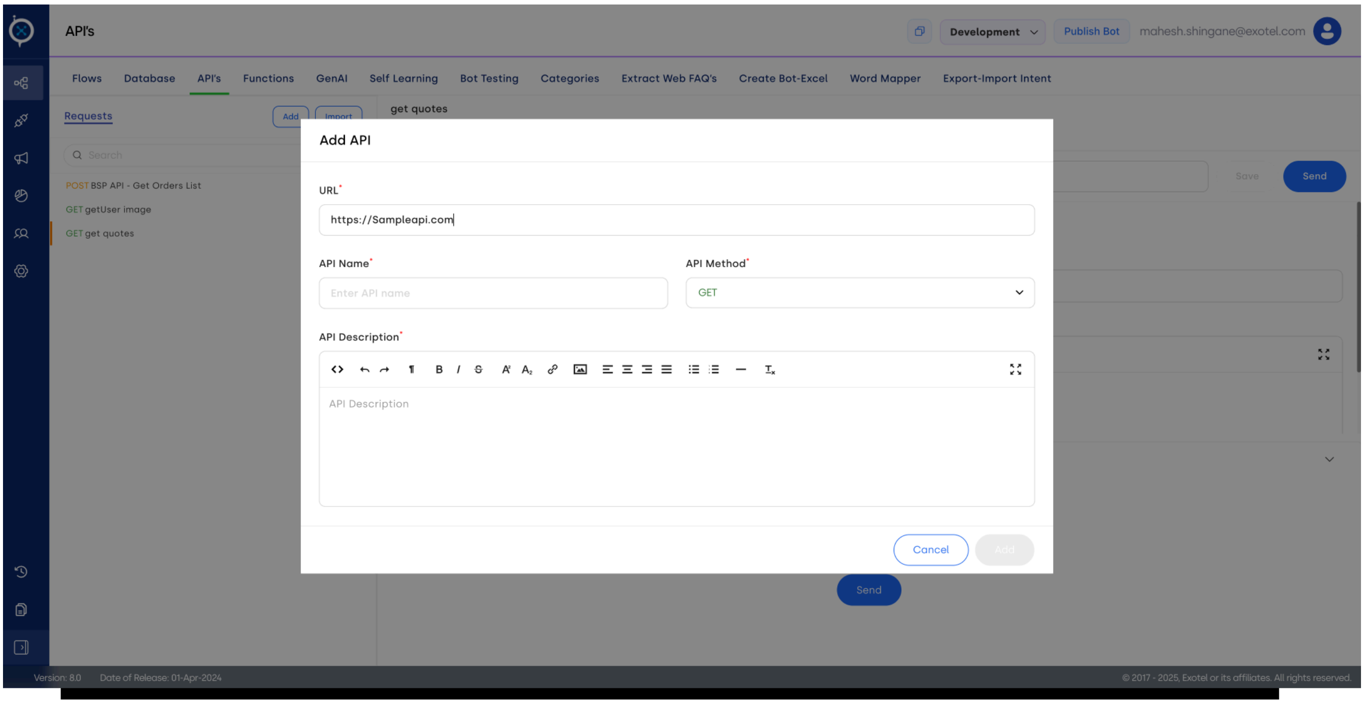
- **Central API Library**: A repository to save and manage all your API configurations for easy reuse across multiple flows.
- **Support for REST Methods**: Configure calls to fetch data (GET), submit data (POST), update records (PUT/PATCH), and more.
- **Comprehensive Configuration**: Set up every part of the API call, including the endpoint URL, headers, query parameters, request body, and authentication details.
- **In-Console Testing**: A built-in testing tool allows you to run an API call and see the live response directly within the console before implementing it in a flow.
- **Flow Builder Integration**: Seamlessly call any saved API from within a conversation, pass dynamic data to it using variables, and save the response for use in subsequent steps.

How to Use API

This guide covers how to add and test an API in the library and then how to use it within the Flow Builder.

2.1 Adding and Configuring an API

- From the main console menu, navigate to **Workflow -> APIs**.
- Click the **Add** button to create a new API or **Import** to upload a collection (e.g., a Postman JSON file).
- **Basic Configuration**:
    - Give your API a descriptive name (e.g., Get_Order_Status).
    - Select the appropriate HTTP Method from the dropdown (e.g., POST).
    - Enter the full **Endpoint URL** for the API.



Detailed Configuration (Using the tabs):

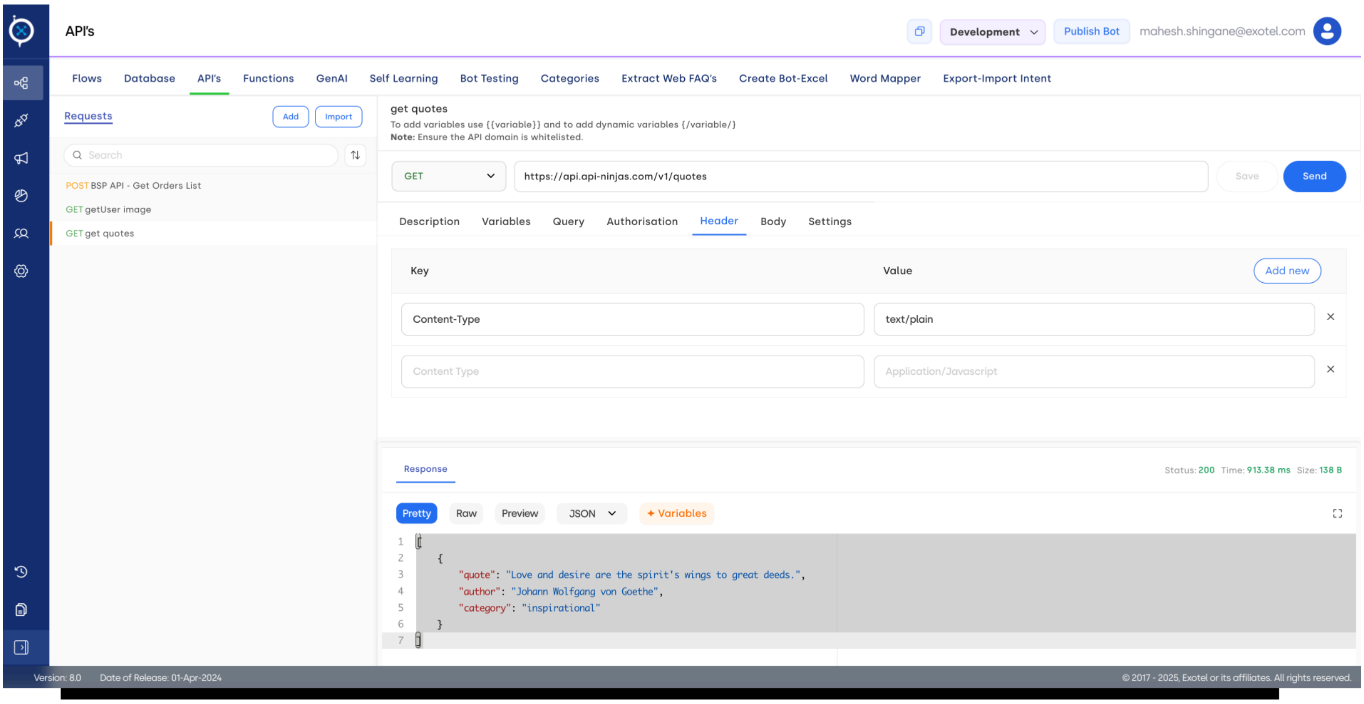
Query: Add any required query parameters (key-value pairs) that will be appended to the URL.

Authorization: Configure the authentication method. For example, select "Bearer Token" and paste your API key.

Header: Add necessary request headers, such as Content-Type with a value of application/json.

Body: For methods like POST or PUT, define the request payload here. You can use variables to insert dynamic data collected from the user.

Settings: Configure advanced options like request timeout or retry-on-failure logic.

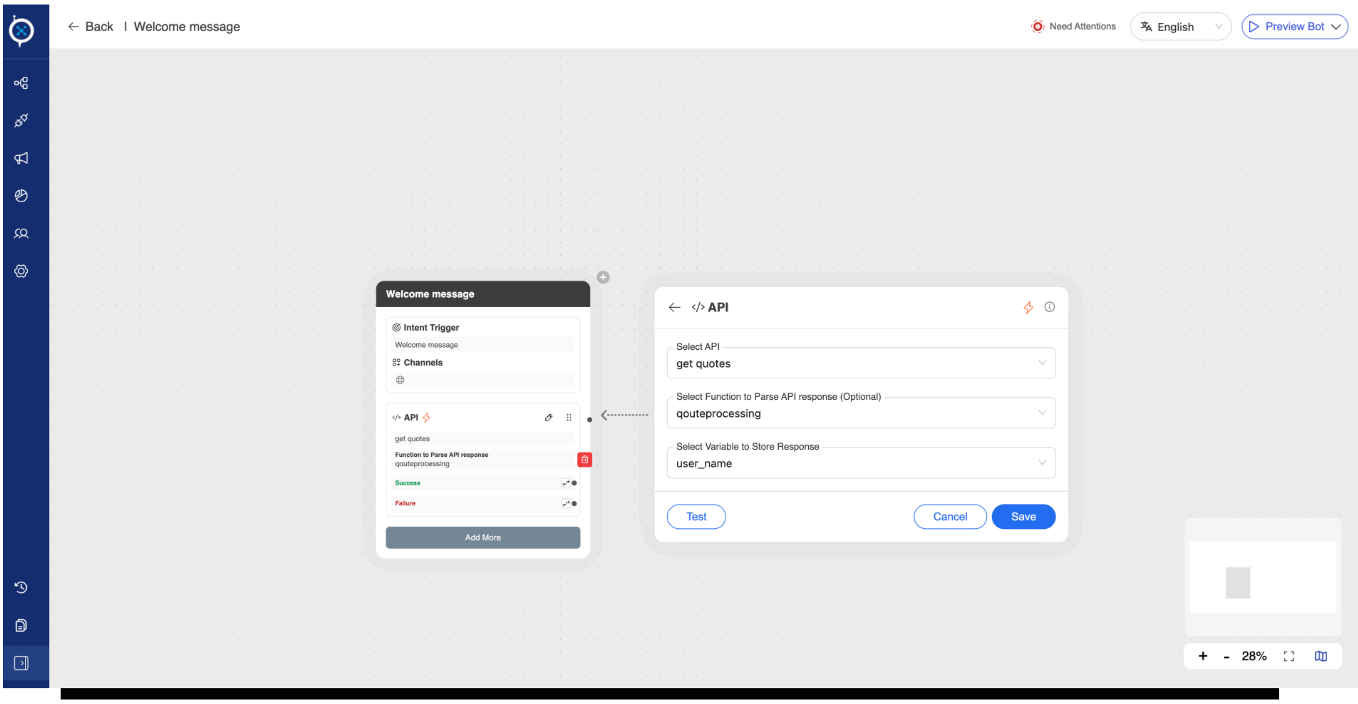


Test the API: Once configured, click the **Send** button. The **Response** window at the bottom will display the status code and the data returned by the API, allowing you to verify that it's working correctly before you use it in a flow.

2.2 Using an API in the Flow Builder

1. In the Flow Builder, add a new step to your flow and select the **Actions** category.
2. Choose the **API** element.
3. **Select API**: From the dropdown, choose the API you previously saved in the library.
4. **Map Variables**: If the API requires dynamic inputs (like a user ID in the URL or data in the body), map the flow variables containing the user's input to the corresponding API parameters.
5. **Store the Response**: Select or create a new variable to store the data returned by the API. This is crucial for using the results.
6. **Handle Success and Failure**: The API node will have two output connectors: **Success** and **Failure**.
    - Connect the **Success** path to the next node that should be triggered if the API call is successful. You can use the variable containing the API response in this path.

- ○ Connect the **Failure** path to a different node that handles the error, for example, by showing the user a message like, "Sorry, I couldn't retrieve your details right now."



Common Examples and Use Cases

- **Real-Time Order Tracking**: A user provides their order number. The bot sends this number to an e-commerce platform's API via a GET request and displays the real-time shipping status returned in the API response.
- **Creating a Support Ticket**: A bot collects the user's issue details in a form. It then uses a POST API to send this data to a helpdesk system (like Zendesk or Jira), automatically creating a new support ticket.
- **User Verification**: A user enters their member ID. The bot sends the ID to an internal database API to verify if the user is a valid customer before proceeding with a sensitive transaction.
- **Dynamic Product Search**: A user asks for "running shoes under $100." The bot calls a product catalog API with "running shoes" and "100" as parameters and displays the results in a carousel.

Best Practices

- **Test Extensively**: Use the **Send** button in the API module to test with both valid and invalid data to see how the API responds to different scenarios.

- **Always Handle the Failure Path**: Network issues and server errors happen. Always build out the "Failure" branch in your flow to provide a good user experience when an API call doesn't work.
- **Use Variables for Everything**: Never hardcode sensitive information like user IDs or search queries directly in the API configuration. Always pass them dynamically using variables collected during the conversation.
- **Parse the Response**: The entire API response (often a complex JSON object) is stored in one variable. Use the **Modify Data** action or a custom **Function** to extract the specific pieces of information you need (e.g., just the status field from the JSON).

Common Mistakes

- **Incorrect Authentication**: Forgetting to add an authorization header or using an expired API key is a common reason for API calls failing with a 401 Unauthorized error.
- **Wrong HTTP Method**: Using a GET request when the external service expects a POST request (or vice-versa).
- **Improperly Formatted Body**: Forgetting to set the Content-Type header to application/json or sending a malformed JSON body in a POST request.
- **Not Storing the Response**: The API might work perfectly, but if you forget to save its output to a variable, the data is lost, and you can't use it in the conversation.
- **Ignoring the API's Data Structure**: Trying to access response.data when the actual data is located in response.result.items. Always check the response structure in the testing tool first.

Note: This module is available on version 8 and onwards.

1.2.1.7. Function Writer

Overview

The **Functions** module is a powerful, pro-code feature within the Exo-Chatbot platform designed for developers and advanced users. It provides an integrated Python code editor, allowing you to write custom logic to handle complex scenarios that cannot be achieved with the standard no-code elements in the Flow Builder.

While the Flow Builder is excellent for visual design and standard operations, Functions are necessary when you need to perform custom data validation, complex mathematical calculations, advanced data manipulation, or implement unique business rules. A function can be called directly from your conversation flow using the **"Function"** action element, enabling a seamless blend of no-code and pro-code capabilities.

Key features of the Functions module include:

- **Integrated Python Editor**: Write, edit, and manage Python scripts directly within the chatbot console.
- **Flow Builder Integration**: Call any saved function from the "Actions" category in the Flow Builder, pass in data using variables, and store the output in another variable.
- **Testing and Debugging**: A built-in tool allows you to run and test your functions with sample inputs before deploying them in a live conversation.
- **Environment Management**: Compare and manage different versions of your functions across Development, UAT, and Production environments.

In essence, Functions provide the ultimate extensibility, giving you the freedom to build virtually any custom logic your chatbot requires.

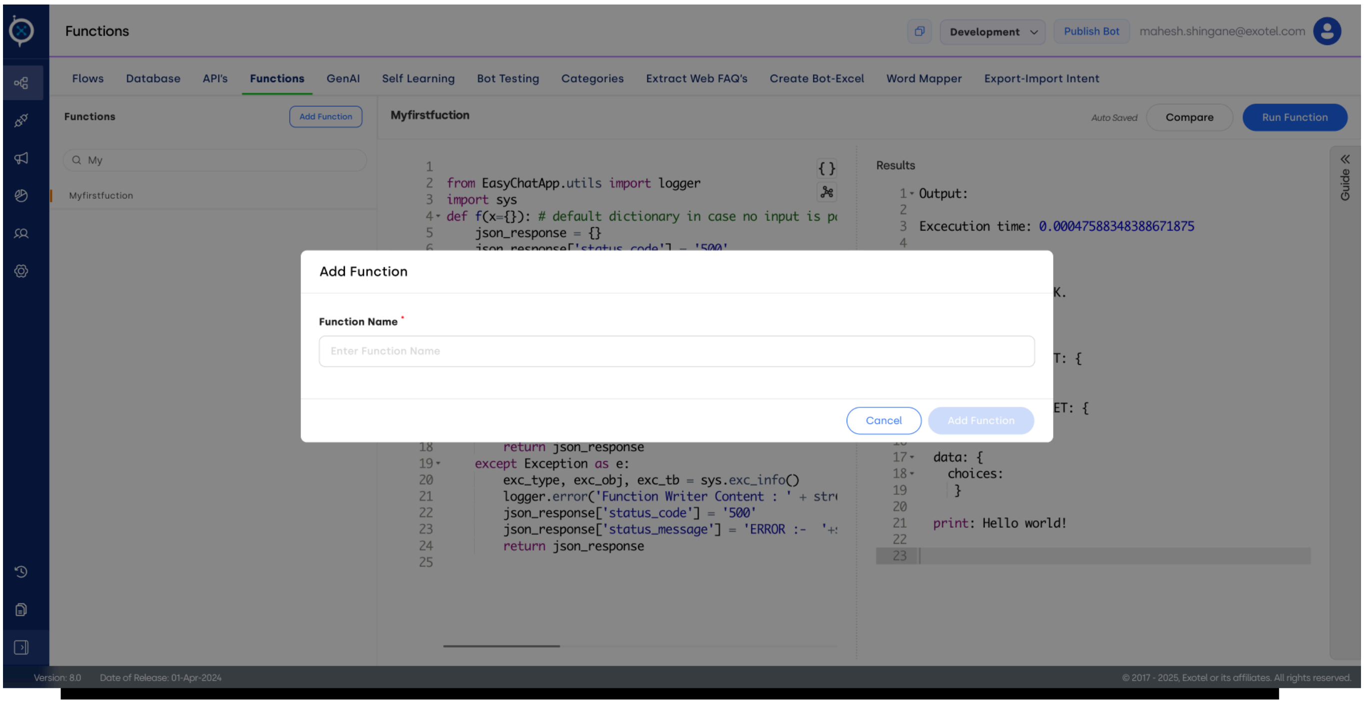
How to Use Fuctions

This guide covers creating a function in the code editor and then integrating it into a conversational flow.

2.1 Navigating to and Creating a Function

1. From the main console menu, navigate to **Workflow -> Functions**.

2. On the left side, you will see a list of existing functions. To create a new one, click the **+ Add Function** button.
3. Give your function a clear and descriptive name (e.g., calculate_emi) and save it.
4. The main area will now display the **Function Writer Board**, a code editor pre-populated with a template. Write your Python code within this editor. Your code must return a JSON object (a Python dictionary) with a specific structure.

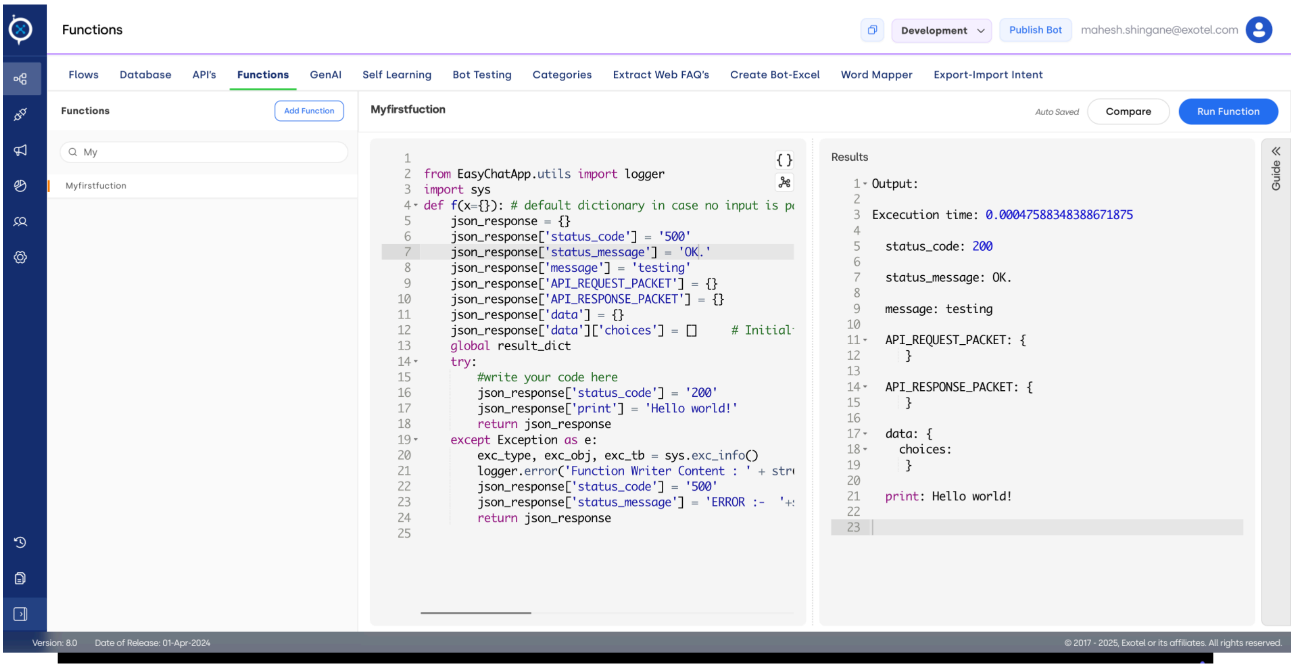


2.2 Writing the Function Code

- **The Editor**: Write your Python logic in the main editor window. The system provides pre-imported libraries like sys and a logger.
- **Input**: Functions can receive data from the chatbot flow. This data is passed in a variable, which your code can access.
- **Output**: Your function **must** return a Python dictionary. A simple success response would look like this:

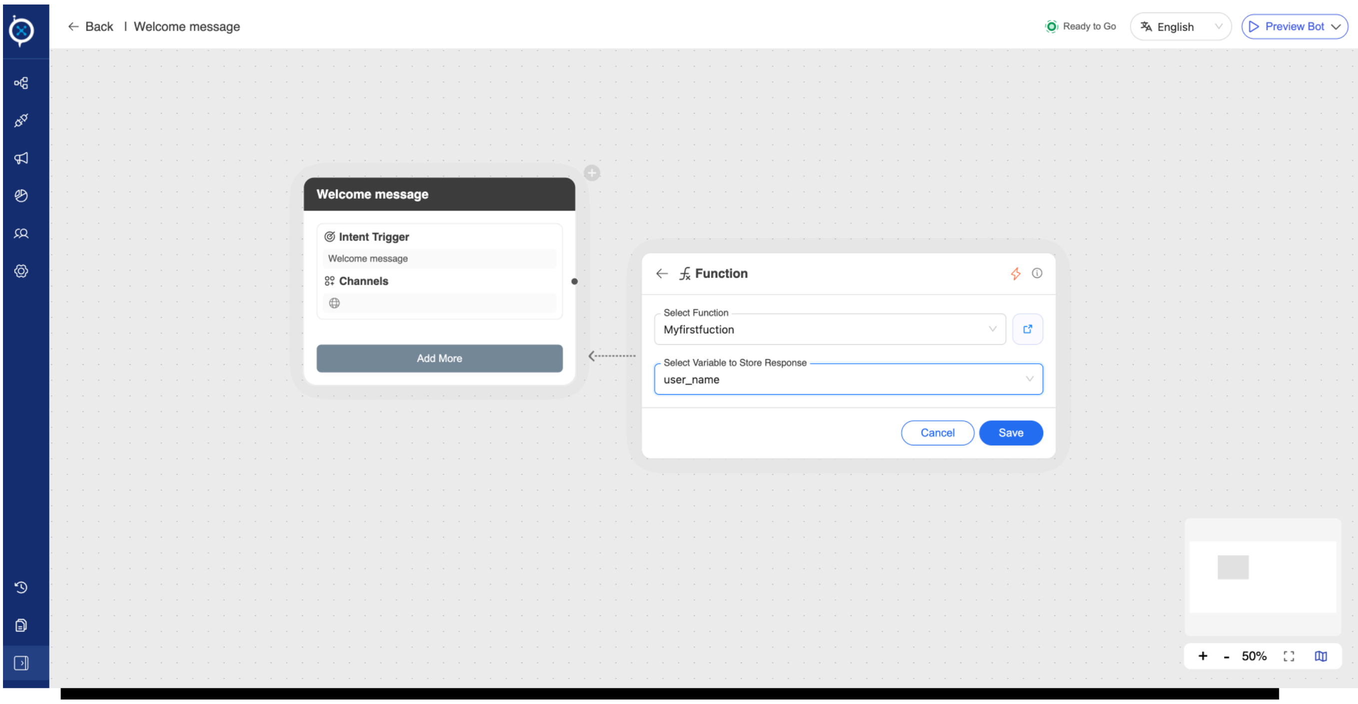
```
json_response['status_code'] = '200'

json_response['print'] = 'Hello world!' # The data you want to use

return json_response
```

- **Testing**: Use the **Run Function** button to test your code. You can provide sample input data to see how your script behaves and check its output before using it in a flow.



2.3 Using a Function in the Flow Builder

1. In the Flow Builder, add a new step where you want the custom logic to run.
2. Select the **Actions** category and choose the **Function** element.
3. **Select Function**: From the dropdown menu, choose the function you previously created.
4. **Pass Input (Optional)**: If your function needs input data, you will map the flow variables containing that data to the function.
5. **Select Variable to Store Response**: Choose or create a variable where the output of your function will be saved. This is crucial for using the result in the next steps of the conversation.



Common Use Cases

- **Complex Calculation**: A user enters a loan amount, interest rate, and tenure. A Function is called to calculate the monthly EMI, which is then returned and displayed to the user in a text message.
- **Custom Data Validation**: A user provides a unique internal ID number (e.g., a policy number with a specific checksum). A Function can run a validation algorithm on this number to confirm it is valid before proceeding.
- **API Response Parsing**: An API returns a large, complex JSON object. A Function is used to parse this object, extract only the three or four key pieces of information needed, and format them into a user-friendly string.
- **Dynamic Content Generation**: Create a function that takes multiple variables (e.g., user name, account type, last login date) and constructs a highly personalized summary message based on conditional logic within the Python script.

Best Practices

- **Keep Functions Focused**: Each function should perform a single, well-defined task. This makes them easier to test, debug, and reuse across different flows.
- **Handle Errors Gracefully**: Use try...except blocks in your Python code to catch potential errors (e.g., invalid input, calculation errors). In the except block, return a proper failure response so your flow can handle the error path.

- **Test All Scenarios**: Use the "Run Function" feature to test not just the "happy path" but also edge cases and potential failure scenarios.
- **Comment Your Code**: Add comments within your Python script to explain your logic. This will be invaluable for you or your colleagues when you need to update the function in the future.

Common Mistakes

- **Incorrect Return Format**: The most common error is forgetting to return a dictionary or using the wrong keys. A function that does not return the expected JSON structure will cause the flow to fail.
- **Not Storing the Function's Output**: Calling a function in the Flow Builder but failing to configure a "Variable to Store Response". The function runs, but its result is lost and cannot be used in the conversation.
- **Assuming a Variable Exists**: Writing a function that relies on an input variable that may not have been set yet in that specific conversational path.
- **Timeout Errors**: Writing a function that performs a very long-running task (e.g., complex loops, slow external calls). Functions should execute quickly to ensure a responsive user experience.

Note: This module is available on version 8 and onwards.

1.2.1.8. Category

Overview

The **Categories** feature is an organizational tool within the Exo-Chatbot platform designed to help you manage and structure your conversation flows (intents). As a chatbot grows in complexity with dozens or even hundreds of flows, it can become difficult to locate and manage specific user journeys. Categories allow you to group related flows into logical, user-defined buckets.

For example, you could create categories for "Sales Queries," "Technical Support," "Account Management," and "General FAQs." By assigning each flow to a relevant category, you create a clean, organized, and easily navigable structure. This makes the bot development process more efficient, especially for teams, as it allows builders to quickly find and work on flows related to a specific business function.

Key capabilities of the Categories module include:

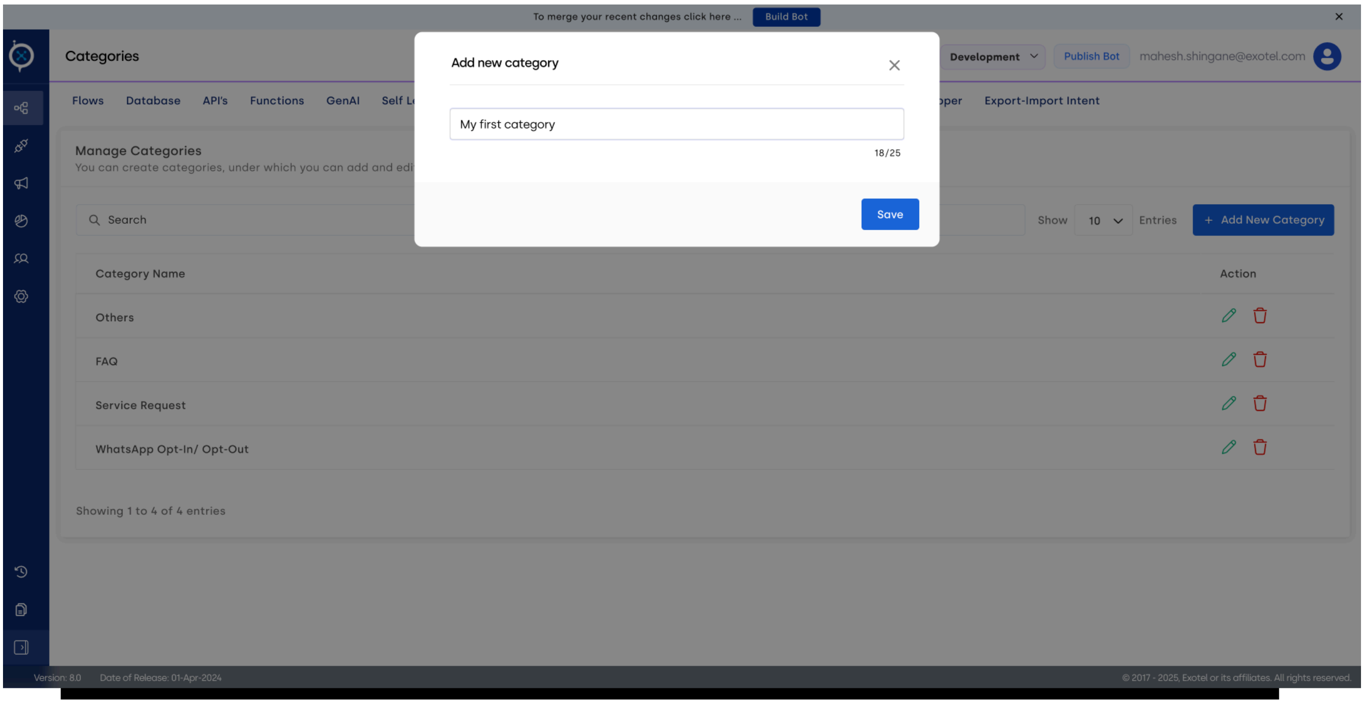
- **Creation and Management**: Add, rename, and manage a list of custom categories tailored to your business needs.
- **Flow Assignment**: Assign any flow to a specific category directly from the Flow Builder.
- **Filtering**: Use the category filter on the main "Flows" page to instantly view only the flows belonging to a specific group.

How to Use Categories

This guide explains how to create categories and how to assign your conversation flows to them.

2.1 Navigating to and Creating a Category

1. From the main console menu, navigate to **Workflow -> Categories**.
2. On this page, you will see a list of all existing categories. To add a new one, click the **Add Category** button (or similar, based on the UI).
3. Enter a name for your new category (e.g., Account Support) and save it.
4. You can also search for existing categories using the search bar on this page.



2.2 Assigning a Flow to a Category

The primary way to use categories is by assigning them to your flows.

1. Navigate to the Flow Builder by either creating a **+ Create Flow** or editing an existing one from the main **Flows** page.
2. Click on the first node in your flow, the **Intent Trigger** node, to open its configuration panel.
3. Locate the **Select Category** dropdown field.
4. Choose the desired category from the list. If you haven't created any, the default will be "Others."
5. Save the changes to the node.

2.3 Filtering Flows by Category

1. Go to the main flow management page by navigating to **Workflow -> Flows**.
2. Click on the **Filter** button located above the table of flows.
3. In the filter options, select the **Category** dropdown and choose the category you wish to view.
4. Click **Apply**. The table will now only display the flows assigned to that specific category.

Common Examples and Use Cases

- **Organizing by Department**: For a large enterprise bot, create categories like HR, IT Support, Finance, and Facilities to separate departmental queries.
- **Structuring by Product Line**: An e-commerce bot could have categories for Electronics, Apparel, Home Goods, and Customer Service.
- **Grouping by User Intent**: A banking bot could be organized into categories such as Check Balance, Fund Transfer, Loan Application, and Report Fraud.
- **Internal vs. External Flows**: Use categories to distinguish between flows designed for internal employees (e.g., Employee Onboarding) and those for external customers (e.g., Product Inquiry).

Best Practices

- **Establish a Naming Convention**: Keep category names clear, concise, and consistent. This makes it easier for all team members to understand the structure.
- **Don't Over-Categorize**: While useful, having too many categories can be as confusing as having none. Aim for a balanced structure that logically groups your flows without being overly granular.
- **Use a "General" Category Wisely**: It's okay to have a general or "Others" category, but review it periodically to see if new, more specific categories should be created from the flows within it.
- **Assign Categories Immediately**: Make it a habit to assign a category as soon as you create a new flow. This prevents a build-up of uncategorized flows that need to be sorted later.

Common Mistakes

- **Inconsistent Categorization**: Two developers might create similar flows but assign them to different categories (e.g., putting a "password reset" flow in IT Support while another is in Account Management). This defeats the purpose of organization.
- **Creating Duplicate Categories**: Forgetting to check if a category already exists and creating a new one with a similar name (e.g., having both Sales and Sales Inquiries).
- **Leaving Everything in "Others"**: The most common mistake is neglecting to categorize flows at all, leading to a large, unmanageable list in the default "Others" category.
- **Using Categories for Flow Logic**: Categories are purely for organizational purposes within the console. They have no impact on the bot's runtime behavior or how a user

interacts with it. Do not expect filtering by category to change how the bot works for the end-user.

1.2.1.9. Create Bot With Excel

Overview

The **Create Bot with Excel** feature is a bulk-creation tool designed to rapidly build and expand a chatbot's knowledge base. It allows administrators to define and upload multiple conversation flows (intents) at once using a structured Excel template. This method is significantly faster than creating each flow individually through the visual Flow Builder, making it the ideal solution for migrating existing FAQ documents or adding a large volume of content in a single operation.

Instead of manually clicking through the interface for each question and answer, you can organize all your content in a spreadsheet and import it directly into the platform. The system then automatically generates the corresponding flows, saving considerable time and effort during the initial bot setup and for large-scale content updates.

How to Create Bot with Excel

This guide outlines the typical process for using the Create Bot with Excel feature to bulk-upload conversational flows.

Note: As per the user manual, this feature is currently under implementation. The exact steps and template format may be subject to change upon final release.

1. Navigate and Download the Template

1. From the main console menu, navigate to **Workflow -> Create Bot with Excel**.
2. On this page, you will find an option to **download an Excel template**. It is crucial to use this official template, as it contains the specific columns and formatting the system requires to process the data correctly.

2. Populate the Excel Template

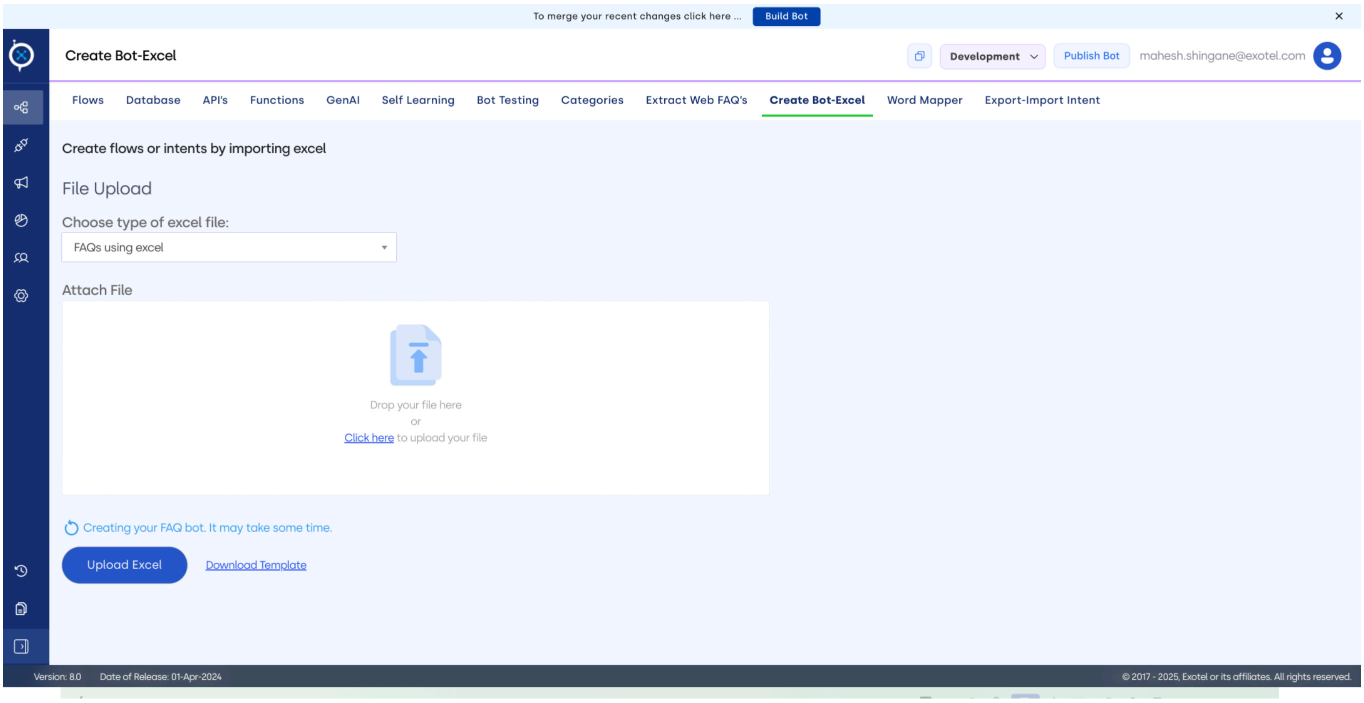
Open the downloaded template. You will see several columns that need to be filled out. The typical columns are:

- **Intent Name**: The primary name for the flow. This is what the user's query will be matched against. Each name must be unique.
- **Training Questions**: Alternative ways a user might ask the same question. Multiple questions should be separated by a specific delimiter (e.g., a comma).
- **Bot Response**: The answer the chatbot will provide when this intent is triggered.
- **Category**: The category to assign the new flow to for organizational purposes.

Fill out one row for each conversational flow you wish to create.

3. Upload the File

1. Save your completed Excel file.
2. Return to the **Create Bot with Excel** page in the console.
3. Use the upload interface to select and import your saved file.



4. Review the New Flows

After the upload is complete, navigate to **Workflow -> Flows**. You will see all the newly created intents listed in the table. It is important to click into a few of them to ensure they were created correctly and test them using the **Preview Bot** feature.

Common Use Cases

- **Initial Bot Setup**: A company has an existing 200-question FAQ document. Instead of spending hours creating 200 individual flows, an administrator can format this data into the Excel template and upload it in minutes.
- **New Product Launch**: To prepare for a product launch, the support team compiles a list of 50 anticipated customer questions and answers. They use the Excel upload to add all this new knowledge to the bot at once.
- **Migrating from Another System**: When migrating from a different chatbot platform, the intents can be exported to a spreadsheet, formatted according to the template, and imported to quickly transition the knowledge base.

Best Practices

- **Start with a Small Batch**: Before uploading a large file with hundreds of entries, create a test file with only 5-10 rows. Upload this smaller file first to ensure the format is correct and the process works as expected.
- **Validate Your Data**: Carefully proofread the content in your Excel file for typos and formatting errors before uploading. An error in the spreadsheet is easier to fix than editing many individual flows later.
- **Use Unique Intent Names**: Ensure that the intent names in your Excel file do not clash with flows that already exist in your bot, unless you intend to update them.
- **Keep a Backup**: Always save a final copy of your Excel file on your local machine as a backup before initiating the upload.

Common Mistakes

- **Modifying the Template Headers**: Changing the column names (e.g., renaming "Intent Name" to "Intent") or deleting columns from the official template will cause the import to fail.
- **Incorrect Delimiter for Training Questions**: Using a semicolon or a pipe (|) to separate training questions when the system expects a comma will result in the questions being misinterpreted.
- **Pasting Formatted Text**: Copying and pasting text from a website or a Word document directly into Excel can carry over hidden formatting, which may cause processing errors. It's safer to paste as plain text.

- **Uploading the Wrong File Format**: Trying to upload a CSV file or a Google Sheet when the system specifically requires an .xlsx file (or vice-versa).

1.2.1.10. Word Mapper

Overview

The **Word Mapper** is a specialized tool within the Workflow module designed to enhance the bot's natural language understanding (NLP) by creating a custom dictionary of synonyms and equivalences. Its primary function is to allow an administrator to map various linguistic terms, acronyms, or jargon that users might input to a single, standardized term that the bot can easily recognize.

This feature is crucial for improving the accuracy of intent recognition. For example, if your internal systems and bot flows are built around the term "INTT," but your customers frequently ask about "interest rate," Word Mapper allows you to create a mapping so the bot treats both phrases as identical. This ensures that regardless of the user's phrasing, they are directed to the correct conversational flow.

Essentially, Word Mapper acts as a translation layer, bridging the gap between how real users talk and how the chatbot's knowledge is structured.

How to Use Word Mapper

This guide explains how to access Word Mapper and add new term mappings.

2.1 Navigating to the Word Mapper Page

1. From the main console menu, navigate to **Workflow -> Word Mapper**.

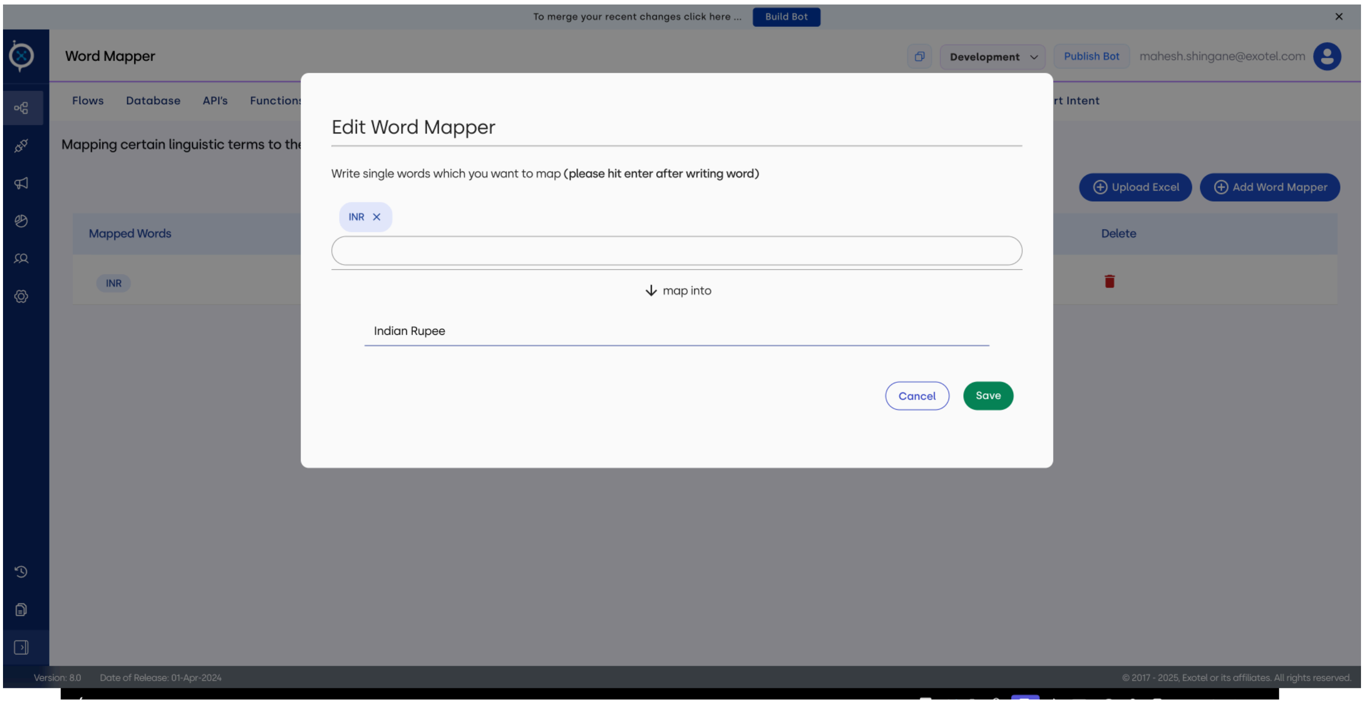
2.2 Adding a New Mapping

1. On the Word Mapper page, you will likely find an interface for managing your list of mapped terms. Click the button to add a new mapping (e.g., "**+ Add Mapping**" or similar).
2. You will be presented with fields to define the relationship:
    - **Term/Keyword**: Enter the word or phrase the user is likely to type (e.g., "interest rate").

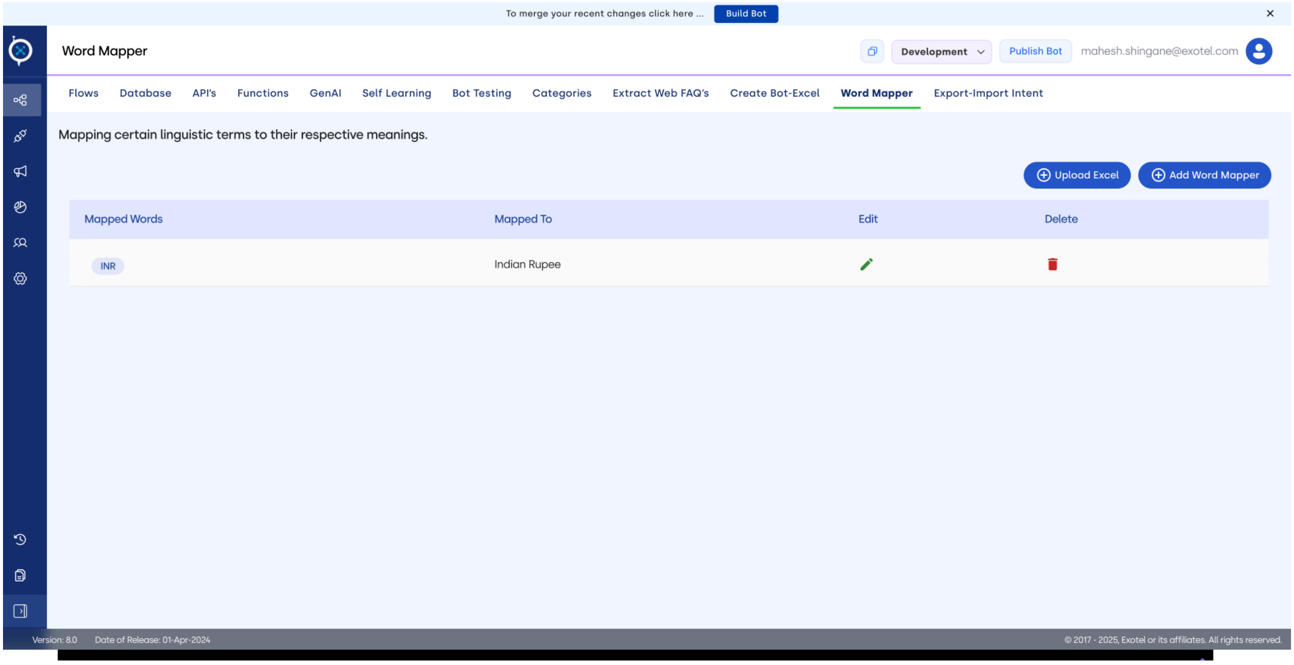
- **Mapped Term**: Enter the standardized term that you want the bot to recognize (e.g., "INTT").

3. Click **Save** or **Add** to add the new mapping to the bot's repository. The bot will now treat any instance of the "Term" as if the user had typed the "Mapped Term."

2.3 Managing Existing Mappings



1. The Word Mapper page will display a list of all existing mappings.
2. From this list, you should be able to **Edit** or **Delete** any mapping that is no longer needed or needs to be corrected.



Common Examples and Use Cases

- **Handling Acronyms and Jargon**:
  - Map the internal term "**INTT**" to the user-facing phrase "**interest rate**."
  - Map "**KYC**" to "**Know Your Customer verification**."
- **Accommodating Slang and Informal Language**:
  - Map "**acc balance**" and "**bal**" to the official intent "**check account balance**."
- **Correcting Common Misspellings**:
  - Map "**lon**" or "**laon**" to "**loan**" to ensure users who make typos are still understood.
- **Standardizing Product or Service Names**:
  - If you have a product named "SuperSaver Account," you could map terms like "**savings account**" or "**saver account**" to it to guide users correctly.

Best Practices

- **Be Specific**: Create mappings that are unambiguous. Mapping a very general term like "help" could interfere with multiple intents, so be precise.
- **Test Your Mappings**: After adding a new mapping, go to the bot preview and test it. Type the term you added (e.g., "interest rate") and verify that it triggers the correct flow associated with the mapped term (e.g., "INTT").

Common Mistakes

- **Creating Overly Broad Mappings**: Mapping a common word like "account" could lead to confusion. If a user types "I have an issue with my account," the bot won't know if they mean a savings account, checking account, or user profile.
- **Mapping to a Non-Existent Term**: Mapping "interest rate" to "INTT" is useless if you haven't built a flow or intent that is triggered by the word "INTT." Ensure the destination term is a valid trigger for a conversation.
- **Assuming Two-Way Mapping**: Creating a mapping from "Term A" to "Term B" does not automatically create a mapping from "Term B" to "Term A." The relationship is one-way.

1.2.1.11. Bot Testing

Overview

The **Bot Testing** feature is a critical quality assurance tool within the Workflow module that helps you ensure the reliability and accuracy of your chatbot's conversational abilities. Its primary purpose is to automatically check for "intent clashes"—scenarios where a user's query could mistakenly trigger the wrong conversation flow because two or more intents have overly similar training phrases.

By simulating user inputs, this tool analyzes the content you've uploaded to the chatbot and identifies potential conflicts that could negatively impact the user experience. It allows you to proactively find and fix issues where the bot might get confused between, for example, a user asking for their "account balance" versus their "last account statement."

The feature provides flexibility by allowing you to test individual intents, select groups of top intents for faster checks, and filter the tests based on the last modification date. The results are presented in a clear report that can be exported via email for further analysis.

How to Use Bot Testing

This guide explains the process of using the Bot Testing tool to validate your chatbot's intents.

1 Navigating to the Feature

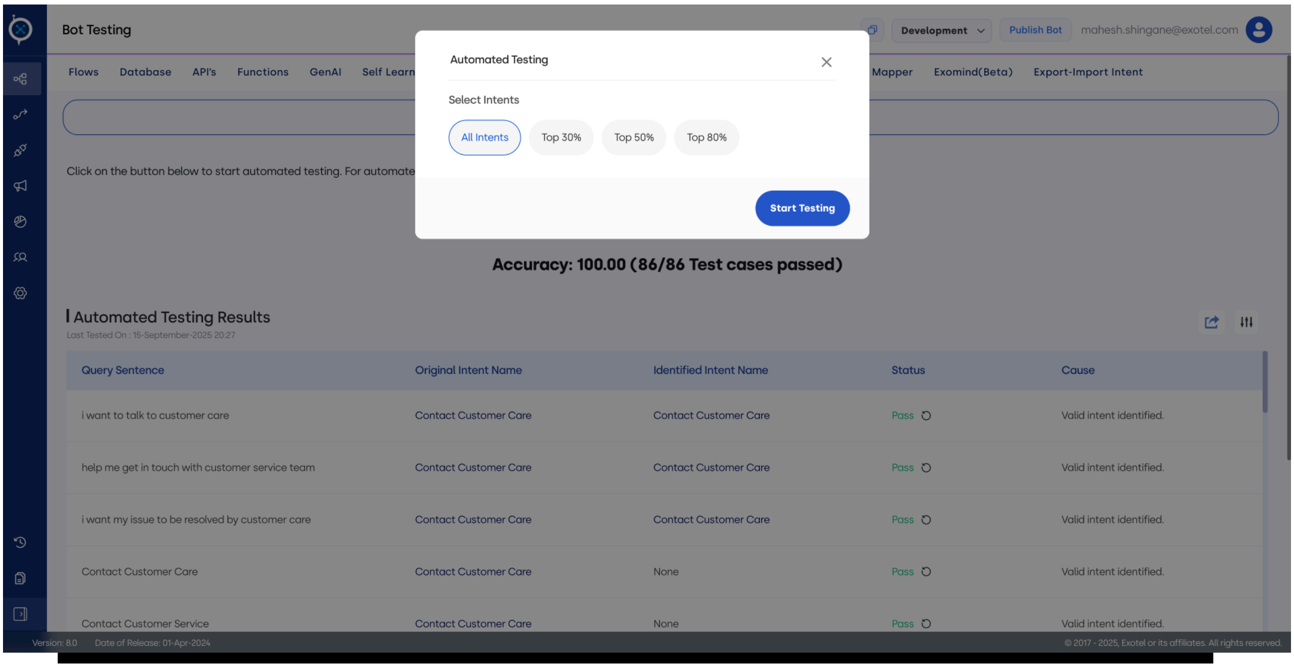
1. From the main console menu, navigate to **Workflow**.
2. Click on the **Bot Testing** tab in the secondary navigation bar.

2 Configuring and Running a Test

1. The Bot Testing interface will allow you to configure the test parameters.
2. **Select Intents to Test**: You can choose how to run the test:
    - **Test Individual Intents**: Select one or more specific intents from a list to check for clashes among a small, targeted group.

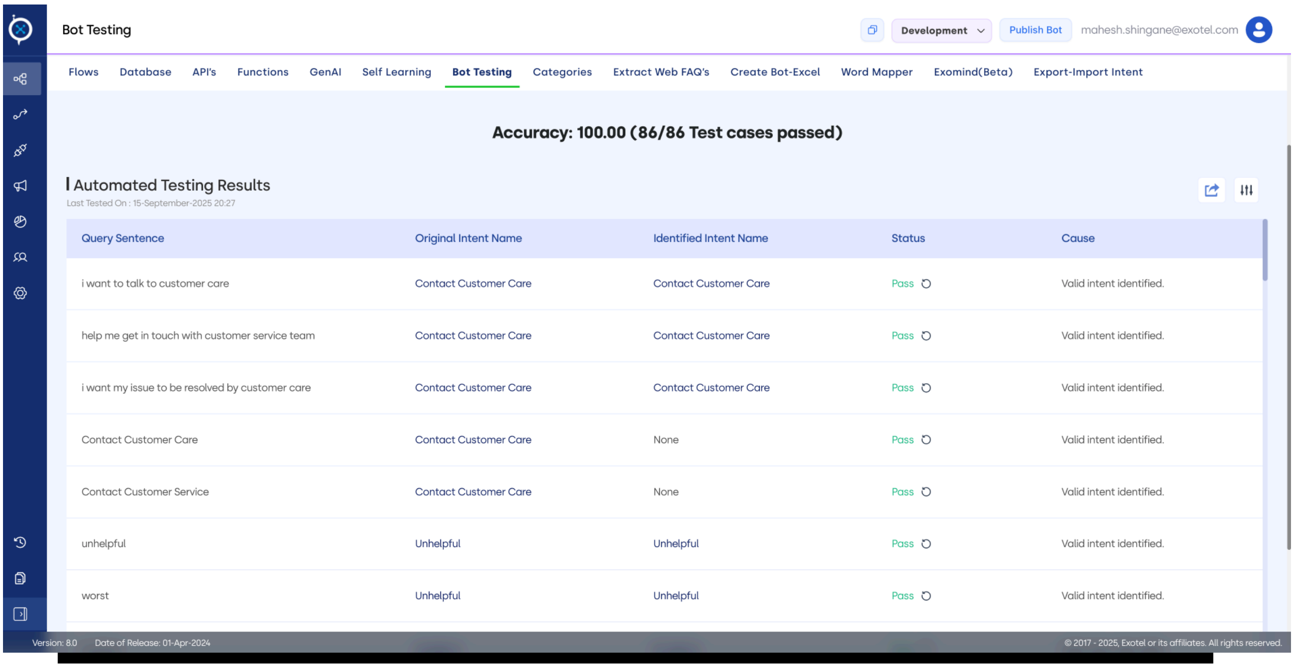
- **Test Top Intents**: Choose this option for a faster test that focuses on the most frequently used or recently modified intents.

3. **Start the Test**: Once you have selected the intents, click the "Start Testing" or a similar button to initiate the process. The system will begin analyzing the training phrases for the selected intents to identify potential overlaps.
4. **(Optional) Stop Test**: You have the option to stop a test in progress if needed.



3 Reviewing Results and Taking Action

1. After the test is complete, the results will be displayed on the screen, highlighting any intents that are found to be clashing.
2. The report will show which intents are in conflict and provide insights into why they are clashing (e.g., similar keywords or phrasing).
3. **Export Report**: You can choose to have the detailed test report exported to your email for offline review and record-keeping.
4. **Fixing Clashes**: Based on the report, navigate back to the **Flows** tab, open the conflicting intents, and edit their **Training Questions** to be more distinct and specific.



Common Examples and Use Cases

- **Post-Content Upload**: After you have created several new flows or used "Extract Web FAQs" to add dozens of intents, run a Bot Test to ensure the new content doesn't conflict with existing flows.
- **Debugging User Issues**: A user reports that when they ask "how do I apply for a loan?", the bot sometimes provides information about checking loan status. Running a Bot Test on the "apply for loan" and "check loan status" intents can quickly identify the source of this confusion.
- **Pre-Deployment Sanity Check**: Before publishing your changes from the Development environment to Production, running a comprehensive Bot Test is a crucial final step to catch any regressions or new conflicts.

Best Practices

- **Test Iteratively**: Don't wait until you've built the entire bot to run a test. Test small, related groups of intents as you build them. This makes it much easier to find and fix clashes.
- **Make Training Phrases Distinct**: If a clash is detected, the best solution is to make the training phrases for the conflicting intents more unique. Add context-specific keywords to differentiate them.
- **Use the "Last Modified" Filter**: Regularly test the intents that have been recently changed. This ensures that recent edits haven't unintentionally created new problems with older, stable intents.

- **Regularly Audit Your Bot**: Schedule a full Bot Test periodically (e.g., once a month) to maintain the overall health and accuracy of your chatbot as it evolves.

Common Mistakes

- **Never Testing**: Building a bot with hundreds of intents without ever running a clash test is a primary cause of poor and unpredictable bot performance.
- **Ignoring Test Results**: Running a test and seeing the clash warnings but not taking action to resolve them. The tool is only effective if its results are used to improve the bot.
- **Creating Vague Intents**: Building intents with very generic, single-word training phrases (like "help," "info," or "details") is a guaranteed way to create clashes with more specific intents.

1.2.1.12. ExoMind - Exo Insights

Feature Overview

Exo-Insights, also referred to as **Exomind**, is a generative AI-powered feature that transforms your chatbot from a flow-based static system into a dynamic, knowledge-based assistant.

Instead of manually building a conversational flow for every possible question, you can create a "knowledge base" by uploading documents, websites, and other resources. The bot then uses this knowledge base to understand and answer a wide range of free-form user queries in a natural, human-like manner.

This feature is designed to handle the "long tail" of user questions that are impractical to cover with individual, pre-defined flows. By training Exomind on your company's support pages, product manuals, policy documents, or FAQs, the bot can intelligently search, synthesize, and present relevant information, complete with source links for verification.

Key capabilities of the Exo-Insights module include:

- **Knowledge Base Creation**: Train the bot by uploading various document types (PDF, DOCX, XLSX, TXT, etc.) or by providing website URLs.
- **Natural Language Understanding**: Allows users to ask questions in a conversational, free-flow manner without needing to use specific keywords.
- **Source Referencing**: The bot can provide a direct link to the document or webpage from which it sourced the answer, enhancing user trust.
- **Priority Management**: Assign priorities to different documents to control which source the bot prefers when information overlaps.
- **Customizable Responses**: Adjust settings like "Temperature" to control the creativity of the bot's answers and "Strictly Answer From Knowledge Sources" to prevent it from responding outside its training data.

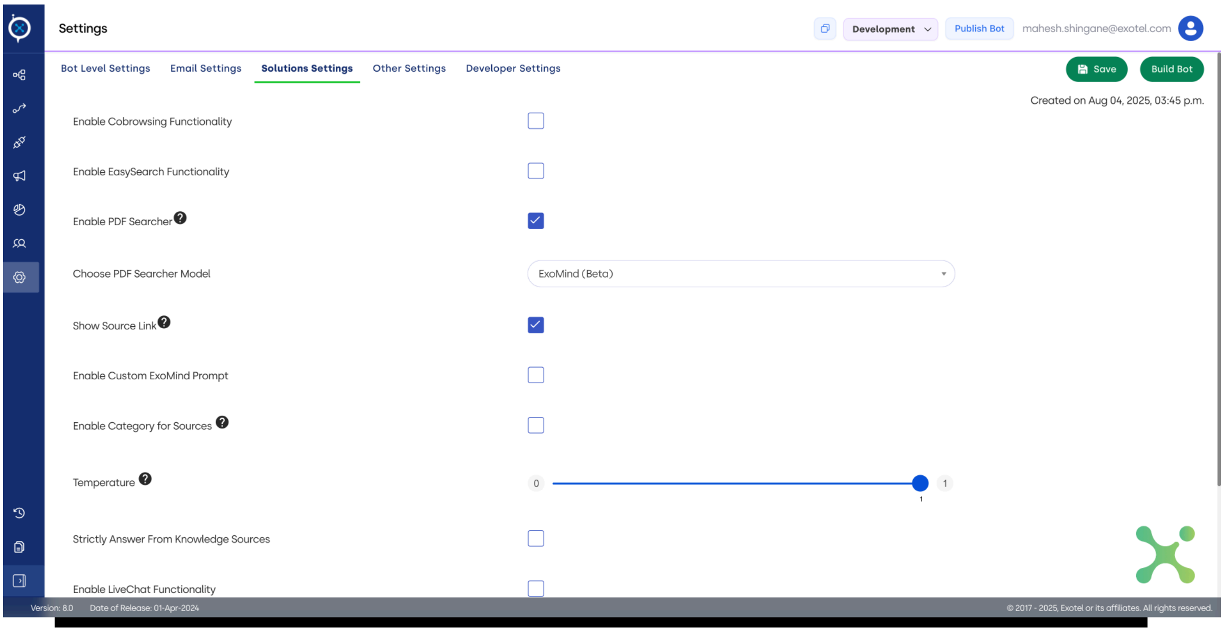
How to Use the Feature

This guide explains how to enable Exomind, build its knowledge base, and manage the content it uses to answer user queries.

Enabling and Configuring Exomind

1. From the main console menu, navigate to **Settings -> Solution Settings**.
2. Enable the **Enable PDF Searcher** toggle.
3. From the **Choose PDF Searcher Model** dropdown, select **ExoMind**.
4. Configure the additional settings:
    - **Show Source Link**: Check this box to have the bot include a link to the source document with its answers.
    - **Temperature**: Adjust this slider to control the randomness of responses. 0 is very factual and deterministic, while 1 is highly creative. A setting around 0.7 is common.
    - **Strictly Answer From Knowledge Sources**: Enable this to prevent the bot from answering questions if it cannot find relevant information in its trained knowledge base.
5. Click **Save**.

```
Note: If the feature might not be available on your bot, please reach out to
your respective Account Manager to get it enabled.
```



Best Practices: Using Exomind with AI Agent (Recommended)

While Exomind can be used independently, we **strongly recommend using Exomind together with the AI Agent (Bot Mandate)** for most use cases.

Why Use Exomind with AI Agent

Using Exomind inside an AI Agent node allows you to:

- Define a **custom prompt** to control *how* the bot answers.
- Shape tone, structure, and verbosity of responses.
- Combine retrieved knowledge with the conversation context.
- Build more flexible and controllable GenAI experiences.

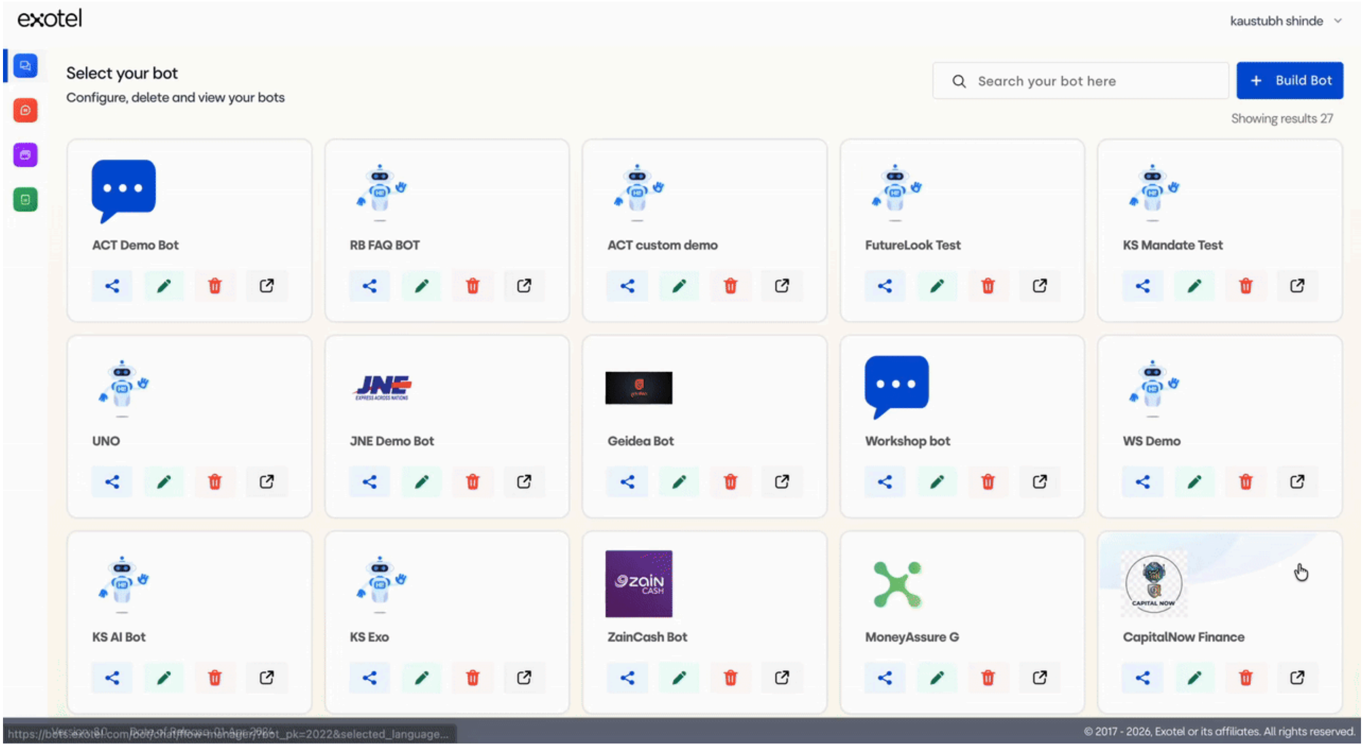
Using Exomind without AI Agent relies on default behavior and **does not allow custom response prompting**.

Recommended Setup Flow

For most use cases, follow this order attached a GIF below:

1. **Enable Exomind**
    - Go to **Enable PDF Searcher → Exomind**
    - Upload and train your documents or FAQs
2. **Enable AI Agent (Bot Mandate)**
    - Go to **Settings → Solution Settings**
    - Enable **AI Agent**
    - You will see 3 AI Agents created by default.
3. **Connect Exomind Inside AI Agent**
    - Navigate the AI Agent studio from the LHS navigation bar bu clicking **Agents**.
    - Open a sub-goal node called "FAQ Node" in **AI Agent Studio,** while you can **Delete** the other AI Agent node if not required.
    - Inside the FAQ node, check the default prompt and update it as per your needs.
    - Click on the Home icon in the Prompt editor, enable the AI Agent toggle.
    - Go to Action and select to update the Action name.
    - Select the **Action Type = Exomind,** a default Exomind of the same bot will automatically connect to the AI Agent node.

This setup allows you to build **flexible, prompt-controlled, GenAI-powered knowledge bots**.



When to Use Exomind Without an AI Agent

You may continue to use Exomind without the AI Agent if:

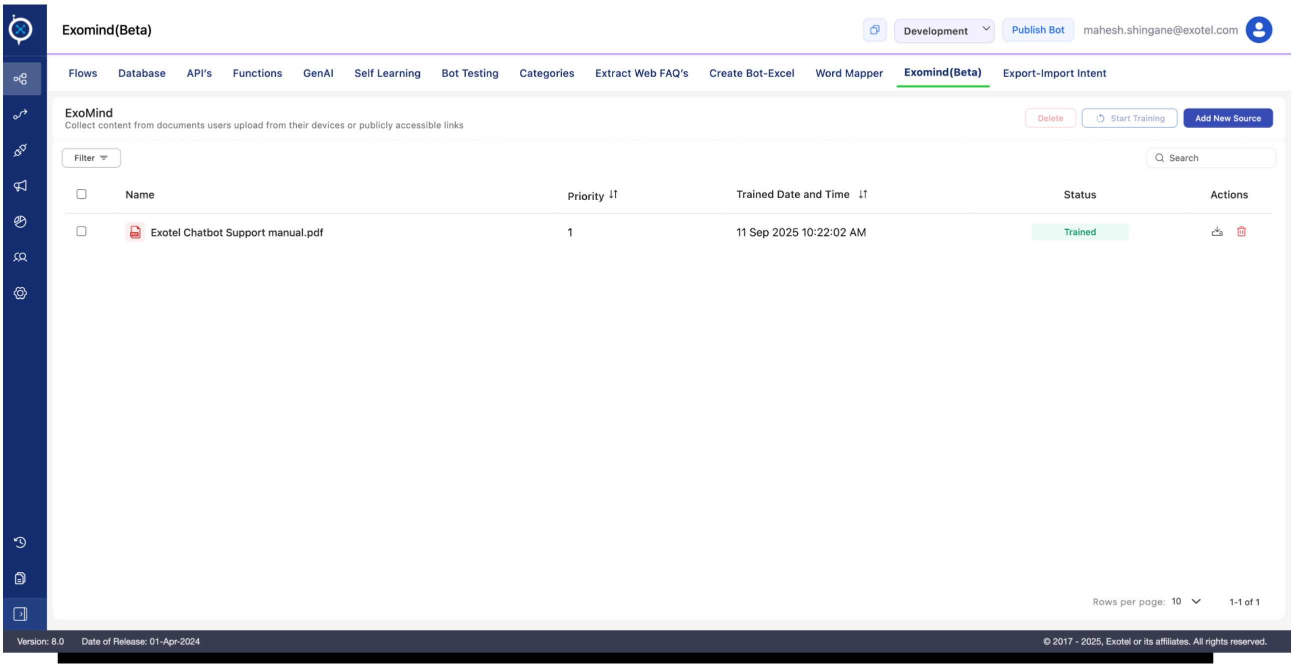
- You prefer a simple, out-of-the-box knowledge base experience
- You do not need custom prompting or advanced conversational control

However, for **most customer-facing and demo use cases**, Exomind + AI Agent is the recommended approach.

Building the Knowledge Base

1. Navigate to **Workflow -> Exomind**. This will take you to the knowledge base management page.
2. Click on **Add New Source**.
3. Choose the type of source you want to add:
    - **For Documents (recommended for best accuracy)**: Select "Upload Documents" and drag-and-drop your files (e.g., PDF, DOCX, TXT).
    - **For Websites**: Select "Add Web Page" and enter the URL.
      Refer to the best practices provided below.

4. After adding the sources, they will appear in the table with a status of "Not trained." You must select them using the checkbox and click **Start Training**.
5. The **Status** column will update to "Training" and finally "Trained" once the process is complete. If it shows "Training Failed," you can hover over the status to see the reason.



Managing Sources

- **Assign Priority**: You can set a numerical priority for each document. When information conflicts, the bot will prefer the source with the lower number (1 being the highest priority).
- **Delete**: Select one or more sources and click the **Delete** button to remove them from the knowledge base.
- **Download/Copy**: For documents, an icon to **Download** the original file is available. For web pages, there is an icon to **Copy link**.

Common Examples and Use Cases

- **HR Policy Bot**: Upload the company's HR handbook, leave policy documents, and benefits guides. Employees can then ask natural language questions like, "How many days of sick leave do I get per year?" or "What is the company's policy on remote work?"
- **Product Support Assistant**: Train Exomind on technical manuals, user guides, and troubleshooting articles. Customers can then ask questions like, "How do I reset my device to factory settings?" or "My screen is flickering, what should I do?"

- **Website Content Search**: Provide the URL of your main website or support section. The bot will crawl the content, allowing users to ask questions about anything on the site directly within the chat window.

We have a sample PDF file with Q&A, and have created a Credit Card Related FAQ topic for reference:

Credit Card FAQ

Best Practices for Creating Documents for ExoMind

This guide outlines how to create, structure, and maintain documents for optimal performance of **Exomind**, our RAG-based Knowledge AI system for Chatbots. Following these standards ensures higher ExoMind / RAG accuracy.

1. Document Structure

- **One Document:** Instead of multiple documents, have a single collated document for one ExoMind (in PDF format)
- **Main Heading:** Should clearly reflect the product or topic (e.g., Loan, Savings Account, Credit Card). Each Heading should start from a different page.
- **Sub Heading (Optional):** Divide content into logical sections for easier navigation. Avoid very deep hierarchy. Keep it two levels only (Heading and Sub-Heading). Each Sub-Heading should also start from a different page.
- **Separate Sub-Heading for Dynamic Content:** Create a separate sub-heading for content which is Dynamic (Changes frequently)

Sub Heading Type	Description	Update Frequency
Static Information	Core product details, eligibility, features, general FAQs	Rarely (More than 2 months)
Dynamic Information	Offers, rates, operational updates, announcements	Frequently (Less than 2 months)

- **Question / Answer Format (FAQ Format):** Inside each Heading/Sub-Heading, format the content into Question/Answer format only
  - Questions can be one or more with a common answer.
  - There will be unique "Question(s)/Answer" pairs in any Heading / Sub-Heading
  - Inside each sub-heading, the Questions must be **Mutually Exclusive** and **Collectively Exhaustible**.
- **Single-Page FAQ:** Keep each FAQ on a single page – the answer must not spill over to the next page (Half answer on one page and the remaining answer on the next page)
- **Avoid Multi-Topic Pages:** Each page should cover a single, well-defined topic. Only very similar questions should be on the same page. Whenever there is confusion, it is better to move to another page. Each page of the document is one RAG chunk
- **Consistent Formatting:** Maintain the same font, header hierarchy, and spacing across all documents.

2. Content Writing Guidelines

- Do not have the **same question twice with different answers in the document**. This is most important to ensure ExoMind accuracy.
- The answer must be comprehensive. It should cover everything, including any potential follow-up questions. Two different questions can have some sections in the answer which are common. No answer should be more than 3 paragraphs.

- Each Question must be complete.
  - It should make sense without knowing the headers, sub-headers, etc. Frame questions as users will ask them. Focus on keywords.
  - There should be an initial question which helps explain the product in simple language.
- Ensure every **"Question(s)/Answer" pair** is self-contained and does not rely on another pair
- The document should be written in the tone which you want the BOT to speak. We suggest keeping the tone friendly and helpful.
- Avoid jargon as much as possible. If you need to use any jargon, define the jargon within brackets.
- If you are using any Acronym, add the full form in brackets each time you use the Acronym (not just at the beginning)
- **Remove Product-Specific Tags:** Exclude internal terms like "JIFFYearn" or "#JIFFYearnCash" unless necessary for comprehension.

  Example:
  ✖ "How to open a JIFFYearn or #JIFFYearnCash time deposit?"
  ✅ "How to open a time deposit in JIFFY Bank?"
- Avoid cross-references like "see above" or "refer below" or "same as above"
- Do not use different terms for the same thing. Avoid Inconsistent Terminology ("Fixed Deposit" / "Time Deposit").
  - Either use both words in all places, or use one single word at all places and one FAQ where it is explained that both these words mean the same thing.
- Do not add a screenshot of Text
- Do not add any image (any non-searchable text) or scanned PDFs

3. Document Naming, Priority and Sanity Testing

- The document/PDF should be named with a version or date.
  - Use consistent naming if multiple documents have to be added in an ExoMind
  - Examples: Loan_FAQ_25_Nov_2025.pdf, CreditCard_20_Nov_2025.pdf

- Use “Priority Setting”, if there are multiple documents with different confidence levels
- Note: We recommend using a single PDF document only for ExoMind.
- Internally maintain version history when updating FAQs to ensure traceability.
- **Test for Accuracy:** After each upload, test key FAQs and confirm the responses get pulled from the correct section.

4. Continuous Improvement Cycle

Regularly review and refine documents using analytics and failed queries.

Frequency	Activity
Monthly	Review top failed queries and restructure content if retrieval gaps persist.
Quarterly	Refresh dynamic data (rates, offers, contact details).
Ongoing	Maintain naming consistency and terminology alignment across all sources.

5. Testing and Debugging Protocol (Post Go Live)

When sharing or analyzing test results, always include:

- Timestamp and Date of the test
- Full conversation screenshot (for debugging context)

If an Issue is Found:

1. Go to **Home** in the test interface.
2. Re-ask the same query.
3. Confirm if the issue still persists.
4. If yes, capture full logs and share with the Exotel Support team.

6. Common Mistakes to Avoid

1.2.2. Integrations

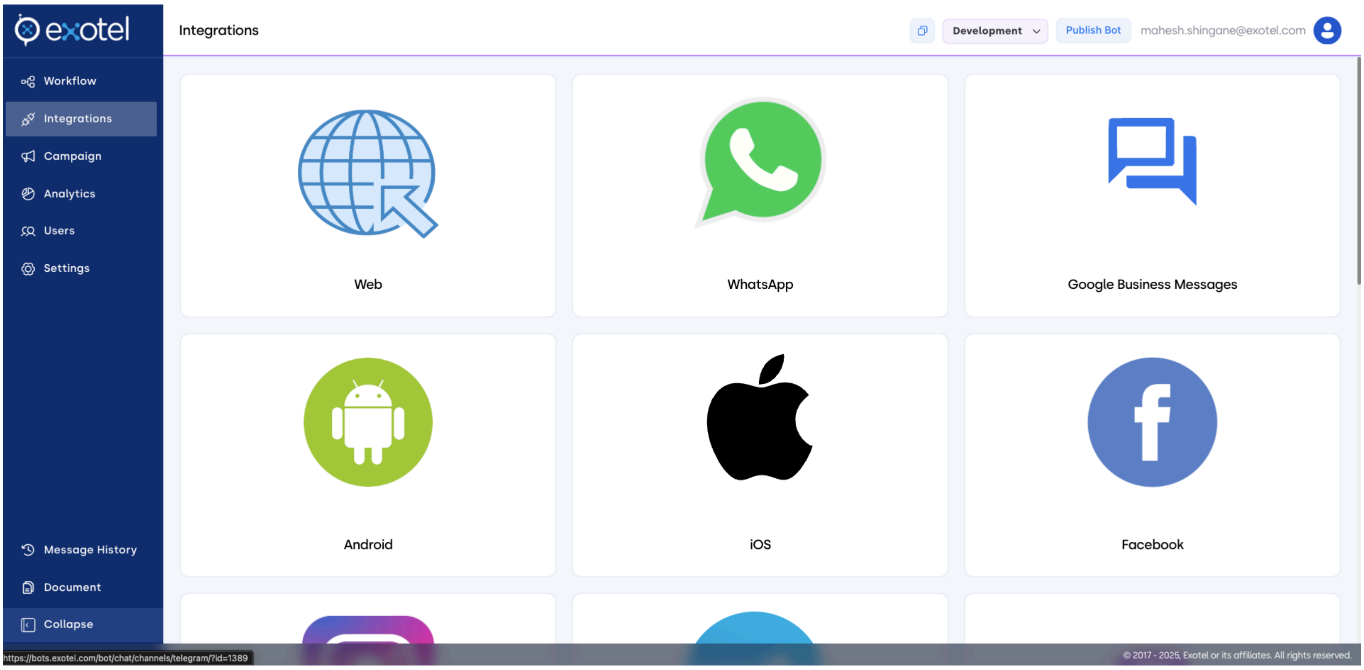
Feature Overview

The **Integrations** module is where you connect your chatbot to the outside world, allowing it to interact with users across a wide variety of digital channels. This feature transforms your bot from a standalone application into an omnichannel communication tool, enabling you to deploy a single, centrally managed bot on your website, mobile app, and popular messaging platforms like WhatsApp, Facebook Messenger, Instagram, and more.

Each channel can be configured independently, allowing you to tailor the bot's appearance, default messages, and initial interactions to suit the specific context and user expectations of that platform. You can customize welcome messages, set up channel-specific languages, and configure UI elements like pop-up behavior and welcome banners for web-based chats.

For third-party platforms, this section is where you provide the necessary credentials, such as API keys, access tokens, and webhook URLs, to authorize the connection and enable communication between the chatbot and the channel.

Channel	Description
Web	The most common channel. Can be integrated into any website with extensive customization options (themes, logos, auto pop-ups, form assist, etc.).
WhatsApp	Engage users on the world's most popular messaging app. Supports interactive messages, buttons, lists, and the WhatsApp Catalogue. Requires a BSP (Business Service Provider) integration.
Android	Integrate the chatbot directly into your native Android mobile application.
iOS	Integrate the chatbot directly into your native iOS mobile application.
Facebook Messenger	Deploy the bot to interact with customers on your business's Facebook page.
Instagram	Connect the bot to your Instagram business account to handle direct messages and story replies.
Google Business Messages	Allows customers to chat with your bot directly from Google Search and Maps.
Telegram	Deploy the bot on the secure messaging platform, Telegram.
Viber	Provide customer service and engagement on the Viber messaging app.
RCS (Rich Communication Services)	The next generation of SMS. Allows for a richer, app-like messaging experience directly in the native messaging app on Android phones.
Microsoft Teams	Deploy the bot internally for employees to use within your organization's MS Teams environment.
Google Home	Create a voice-based bot that integrates with Google's smart home assistant.
Alexa	Develop a custom Alexa Skill so users can interact with your bot through Amazon's voice assistant.


exotel
Integrations
Development
Publish Bot
mahesh.shingane@exotel.com
Workflow
Integrations
Campaign
Analytics
Users
Settings
Message History
Document
Collapse
Web
WhatsApp
Google Business Messages
Android
iOS
Facebook
https://bots.exotel.com/bot/chat/channels/telegram/?id=1389
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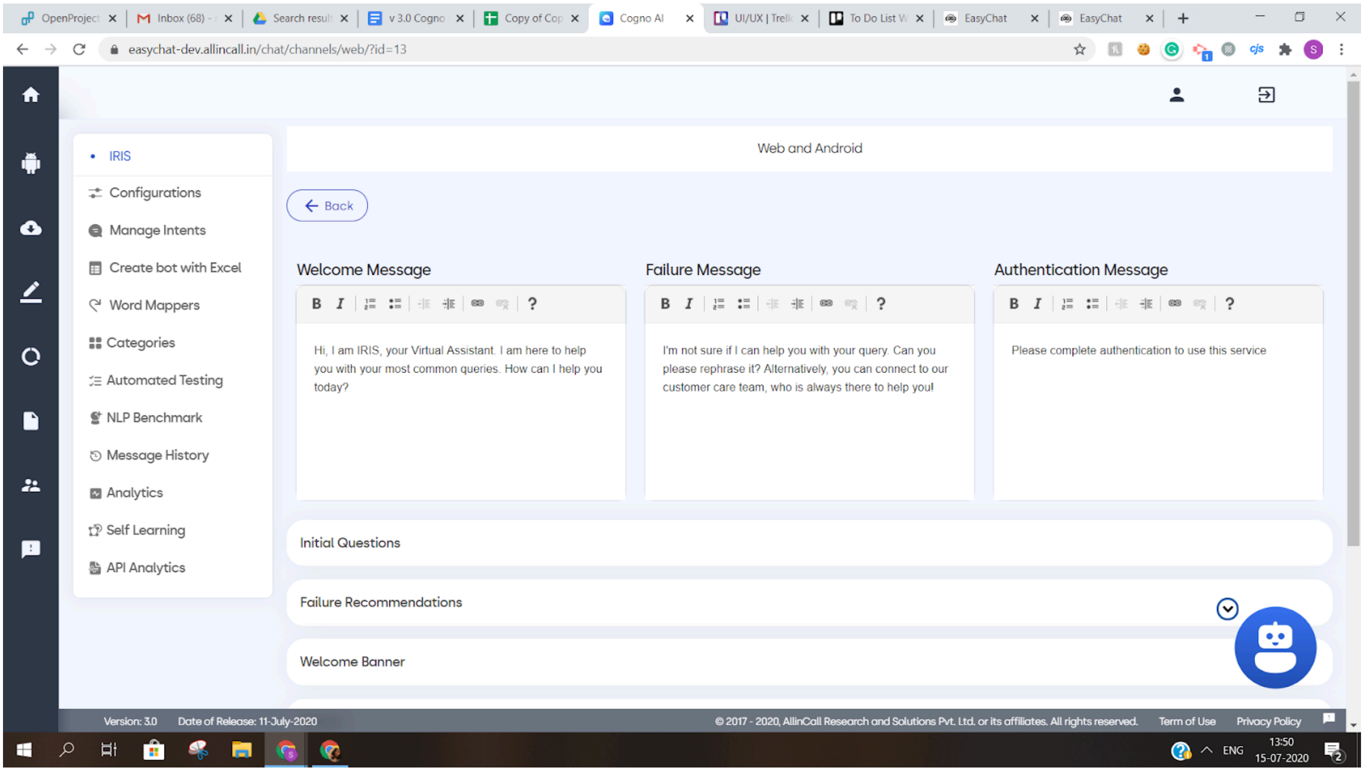
1.2.2.1. Web Channel

Channels - Web

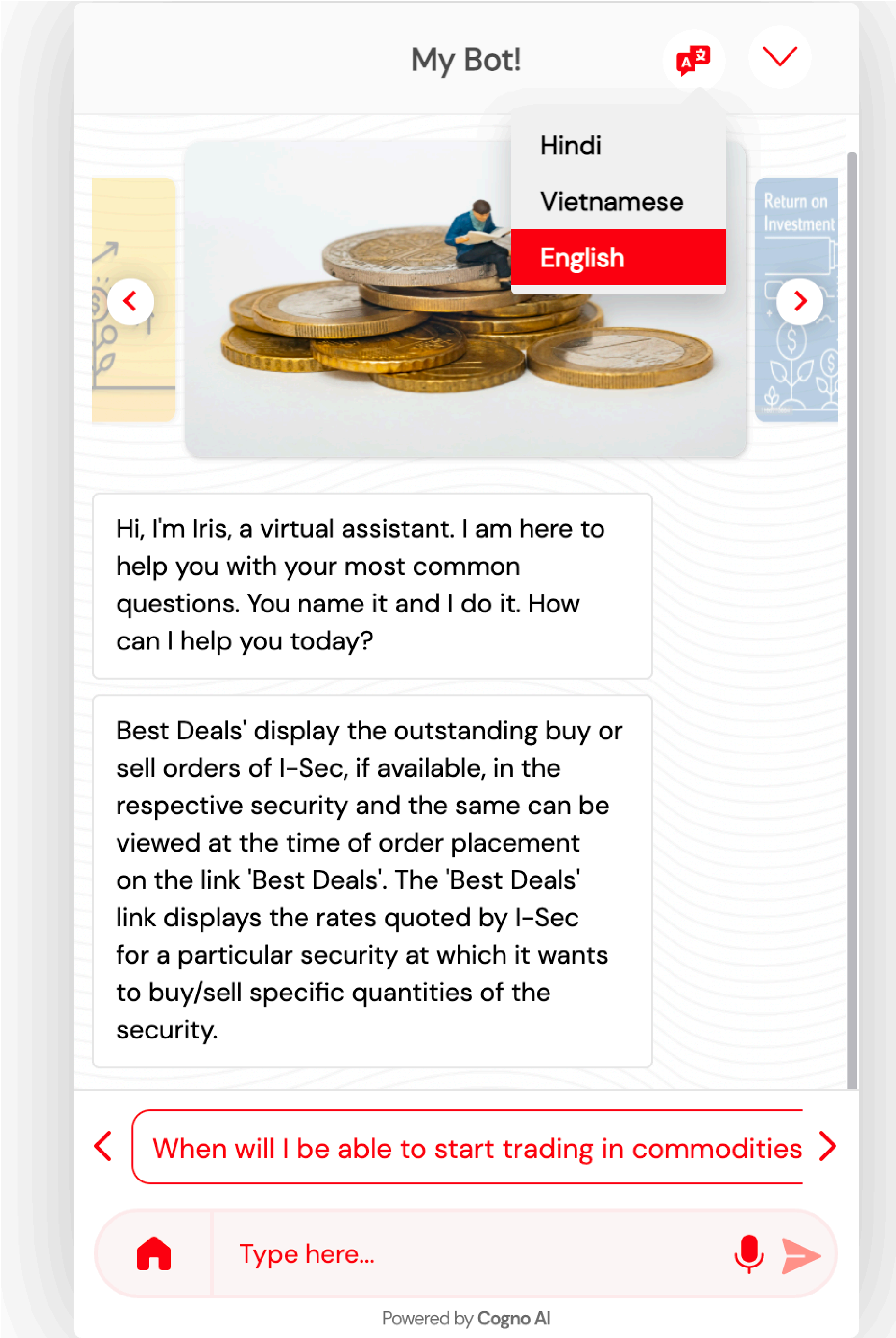
Feature name	Definition
Welcome /Failure/Authentication Message	Customizable text for Failure and Authentication messages to be shown to the end-user when interacting with the bot.
Initial questions	The initial set of queries post welcome message are configurable(you can select which intent to show as suggestions). Add New Tag to intent if needed.
Failure recommendations	When an intent is not recognized a failure message is displayed as a bot response with the provided failure recommendation intent selected.
Language Supported	Admin can select different languages from the front end for the respective bot and the customer gets an option to select from the drop down in which language he wishes to use the bot. Languages supported are English, Hindi, Vietnamese, Tamil, Telugu, Kannada, Malayalam, Oriya, Gujarati, Bengali.'Enable phonetic typing in bot' (only for HINDI)'Enable Language Bot Auto Detection'
Auto Popup settings	As an Easychat console user, he/she can enable auto bot popup for mobile/desktop, popup timer, popup type i.e bot auto popup, auto popup text, intent bubble. This can be fine tuned.
Enable Form Assist functionality	This enables the Form to assist Functionality in the bot. This can be useful when any user is stuck while filling any form and the respective intent is called. Enable voice-based Form Assist Available. Enable or Disable the Input fields in the bot for mapped fields in the form.
Welcome Banner	Customise the welcome banner by enabling automatic scrolling and can also set a time interval for the same (in seconds).
Deploy	By providing the website link we can deploy the bot on provided website link using cjs
Sticky Buttons	Intents that will be permanently shown to the user at the bottom of the chat screen, above the input text area. Specific intents which are too important can

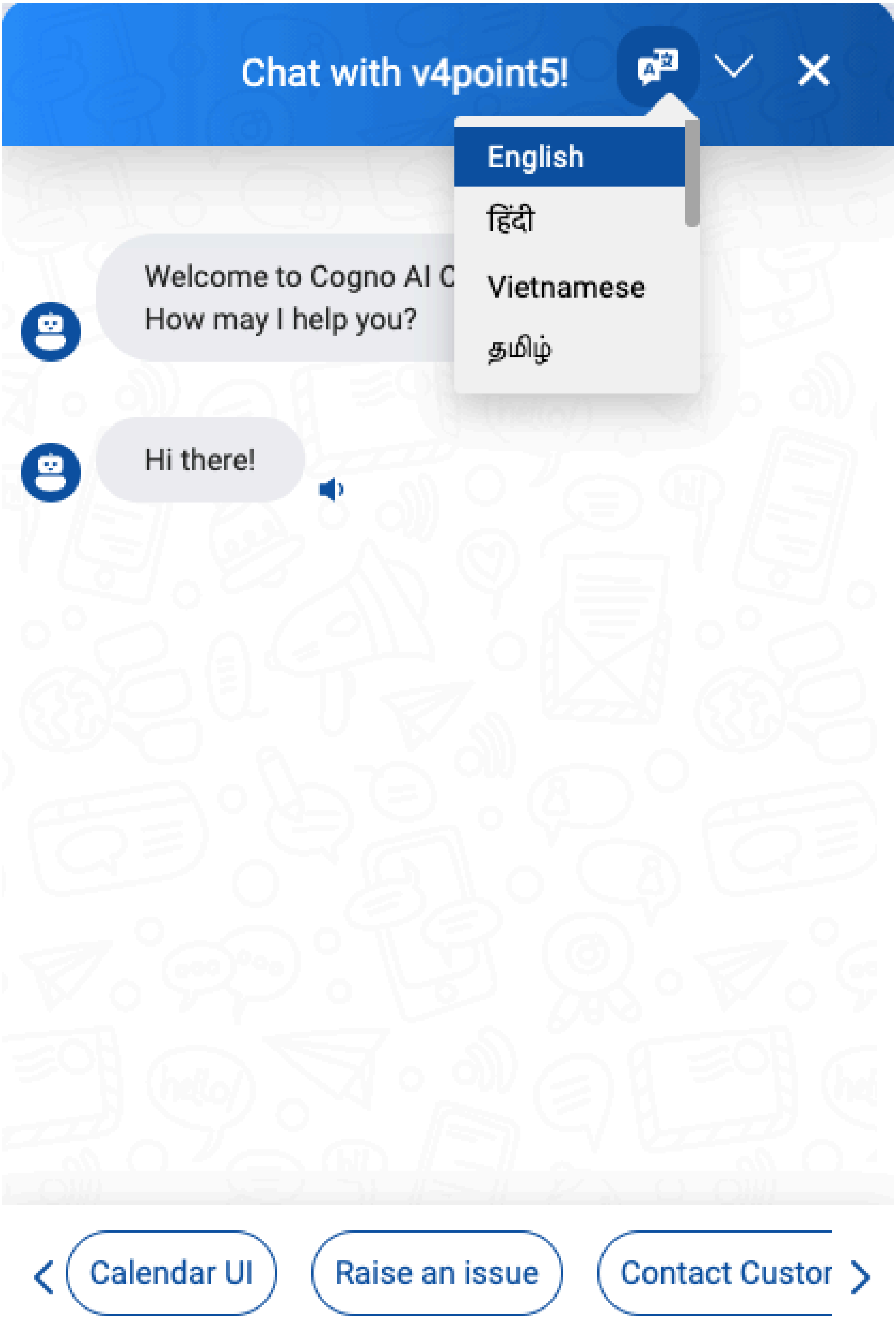
Feature name	Definition
	be called by the user. Sticky buttons can also be displayed in a menu format.
Web URL Landing	By specifying the webpage and the intent, the admin can allow multiple webpages to have multiple initial intents to be triggered when users land on the chatbot.
Other settings	-Input field toggleable -Image and Video to be shown in welcome response.-Bot position on the website.-Allowing users to minimize the web bot icon to ensure a smooth website browsing experience- Allowing user to enable/disable bot notification sound-Change theme colour of the bot as per business needs-Upload a bot icon as per business needs-Upload bot/company logo



Admin can customize the text for Failure and Authentication messages to be shown to the end-user when interacting with the bot. Also, the initial set of queries in the welcome message, recommended queries in a failure message that is to be shown to the user can be configured here.

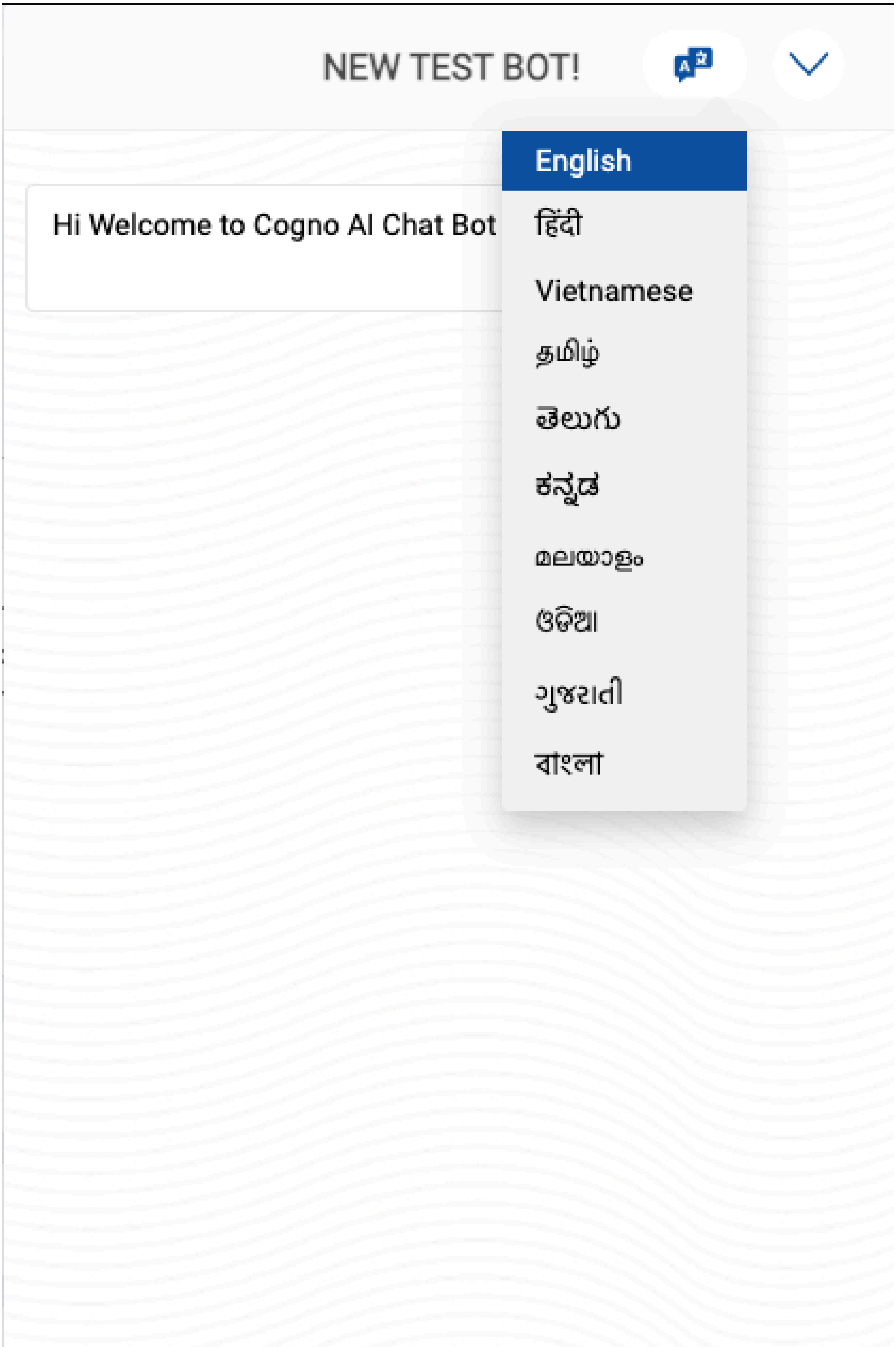
- Language Supported- Open the bot, on the top bar, a language icon will appear. Click on it and a drop down will appear, which contains all the languages enabled by the admin. On selecting a language the whole bot will display the data in that language.


My Bot!
Hindi
Vietnamese
English
Return on Investment
Hi, I'm Iris, a virtual assistant. I am here to help you with your most common questions. You name it and I do it. How can I help you today?
Best Deals' display the outstanding buy or sell orders of I-Sec, if available, in the respective security and the same can be viewed at the time of order placement on the link 'Best Deals'. The 'Best Deals' link displays the rates quoted by I-Sec for a particular security at which it wants to buy/sell specific quantities of the security.
When will I be able to start trading in commodities
Type here...
Powered by Cogno AI

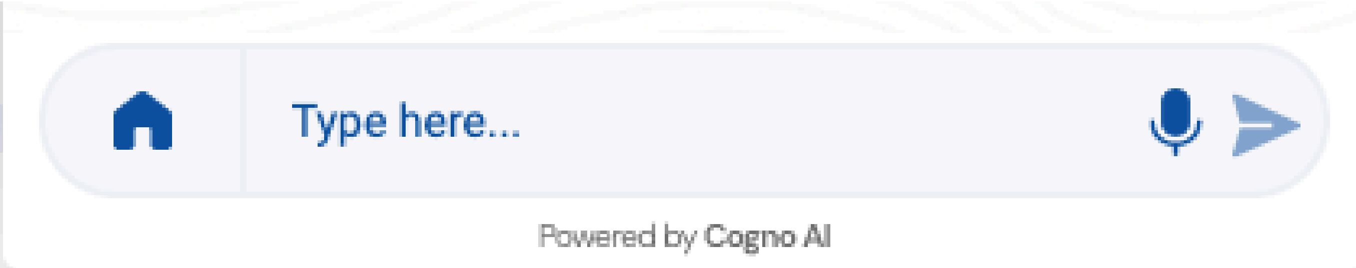

Chat with v4point5!
English
हिंदी
Vietnamese
தமிழ்
Welcome to Cogno AI C
How may I help you?
Hi there!
Calendar UI
Raise an issue
Contact Custor

Note : Available in both themes

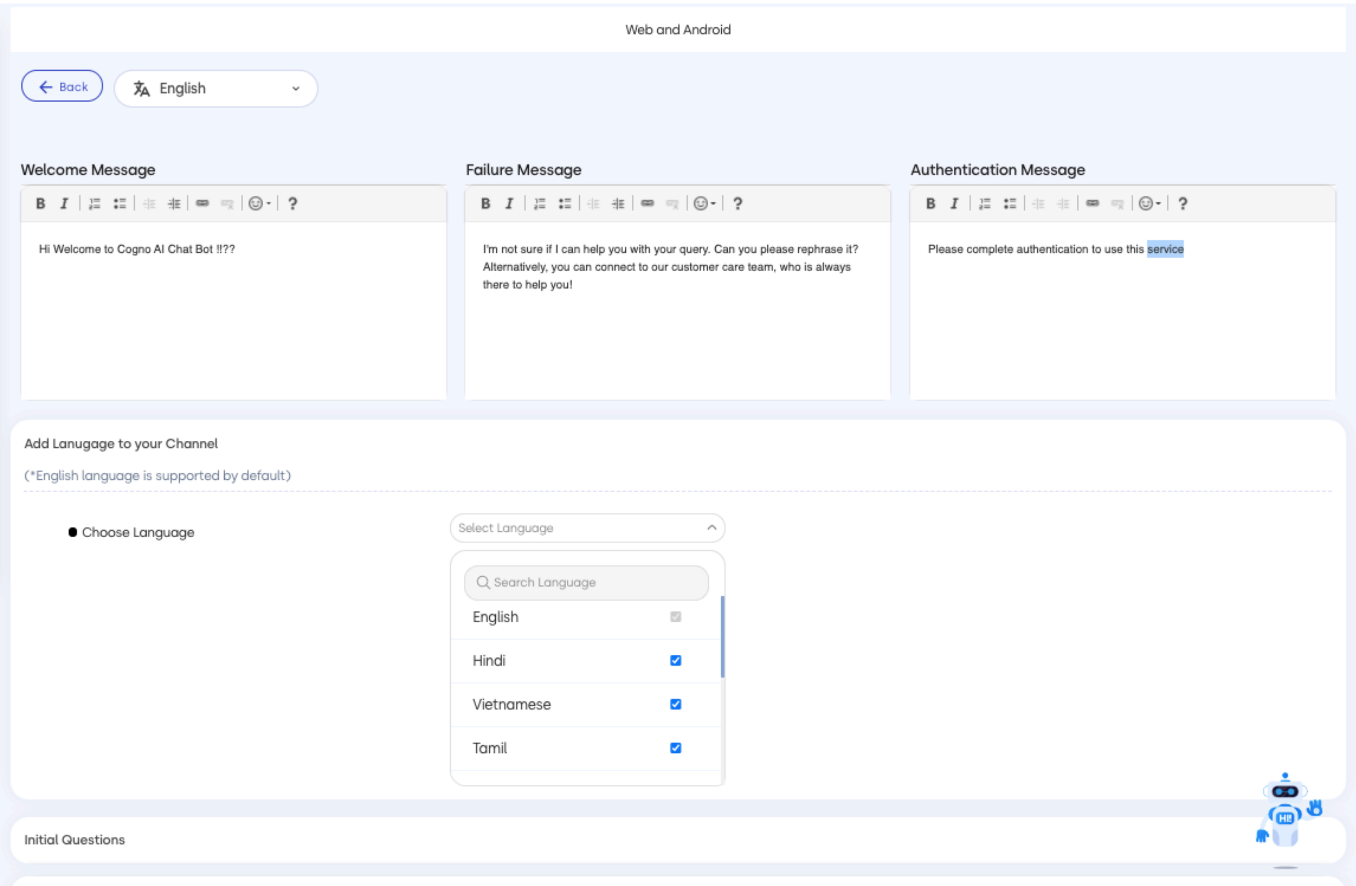
For Web: The user can simply change the language using the icon provided at the top right corner of the bot window.



NEW TEST BOT!
Hi Welcome to Cogno AI Chat Bot
English
हिंदी
Vietnamese
தமிழ்
తెలుగు
ಕನ್ನಡ
മലയാളം
ଓଡ଼ିଆ
ગુજરાતી
বাংলা

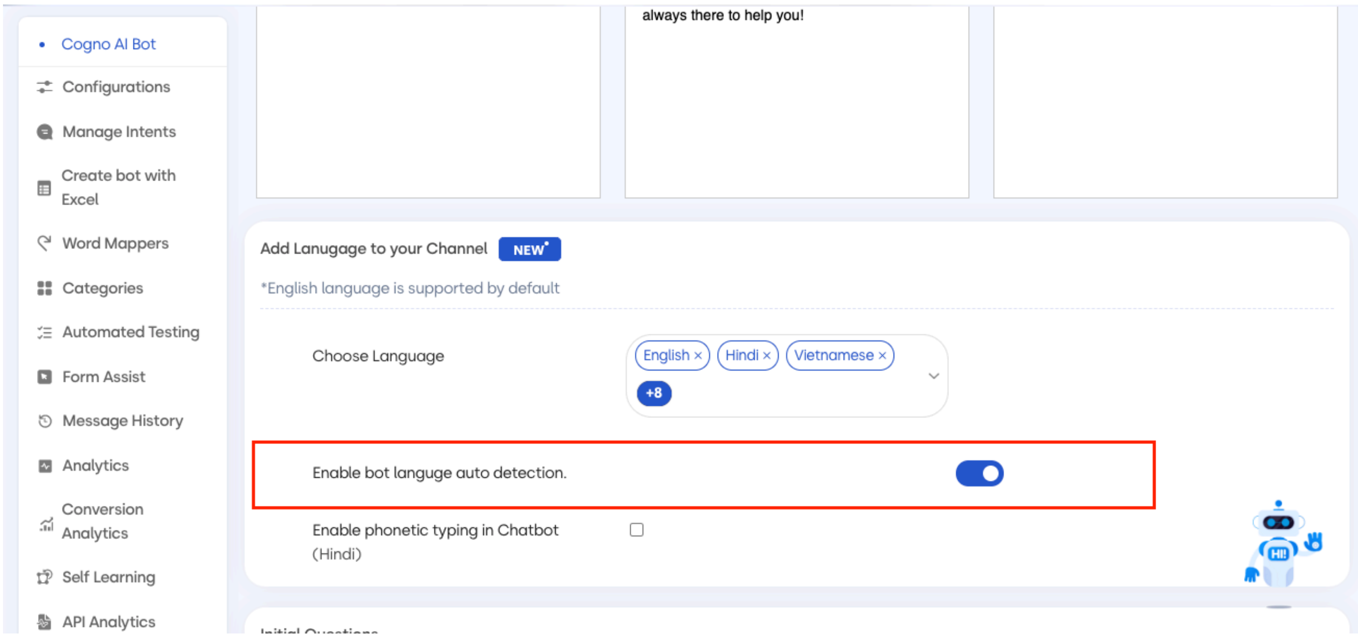


Previously languages were global settings and cannot be applied on channel level.Now they can be configured based upon channelsThis is visible under Configuration > Channel > Select the channel > Add language to your channel > Select the languages to be added



Enable Language Bot Auto Detection The language of the queries asked will be auto-detected in the bot and the response will be available in the detected language if the language is available in the Bot.

To configure : This is visible under ChatBot Console > Configurations > Channels > Web/WhatsApp > Add Language To Your Channel > Enable by clicking on the checkbox (Enable Bot Language Auto Detection)



For Web:

If the language of the query invoked by the user is other than the currently being used language in the bot, and if that language is available in the Bot then a confirmation message in the same language as detected in the user's query to convert the language of the Bot will be provided.

If the user types "No" then the confirmation message on the language change will not be provided next time for the same session, instead the user will have to select the language from the dropdown to change the language and interface of the Bot.

Note: When clicked on Yes, only the Bot interface will change. The previous messages will remain as it is in the same language it was. The Bot will not refresh and load all the

previous messages in the session.

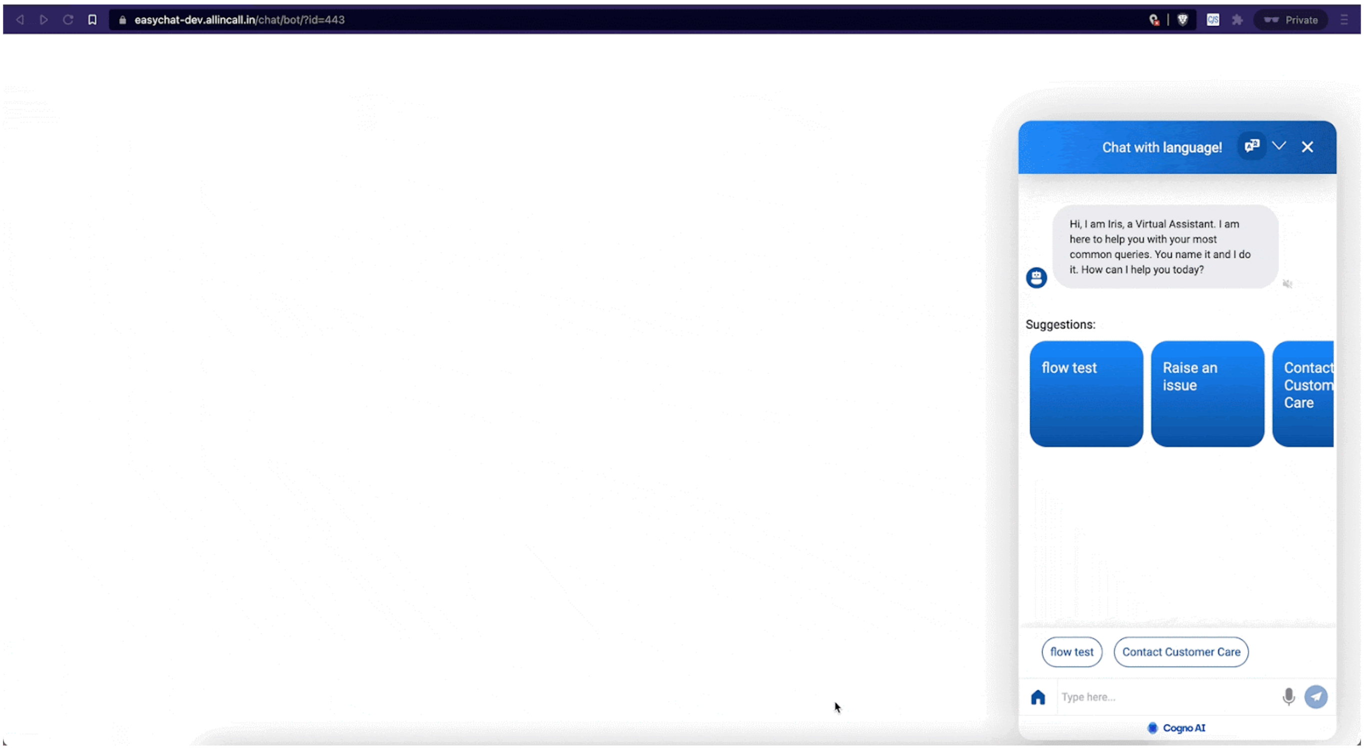
If the Language detected in the user query is not available in the Bot then, then all the available languages in the bot will be displayed below.

Refer the below shown demo for better understanding or click here

For WhatsApp :

No confirmation will be provided to convert the bot language. A toggle 'Enable choose a language menu for customers with the welcome message' is provided in the Configurations → Channel → Whatsapp. (By default this will remain off).When the user types in the Language which is not available in the Bot, a message will be displayed as shown below.

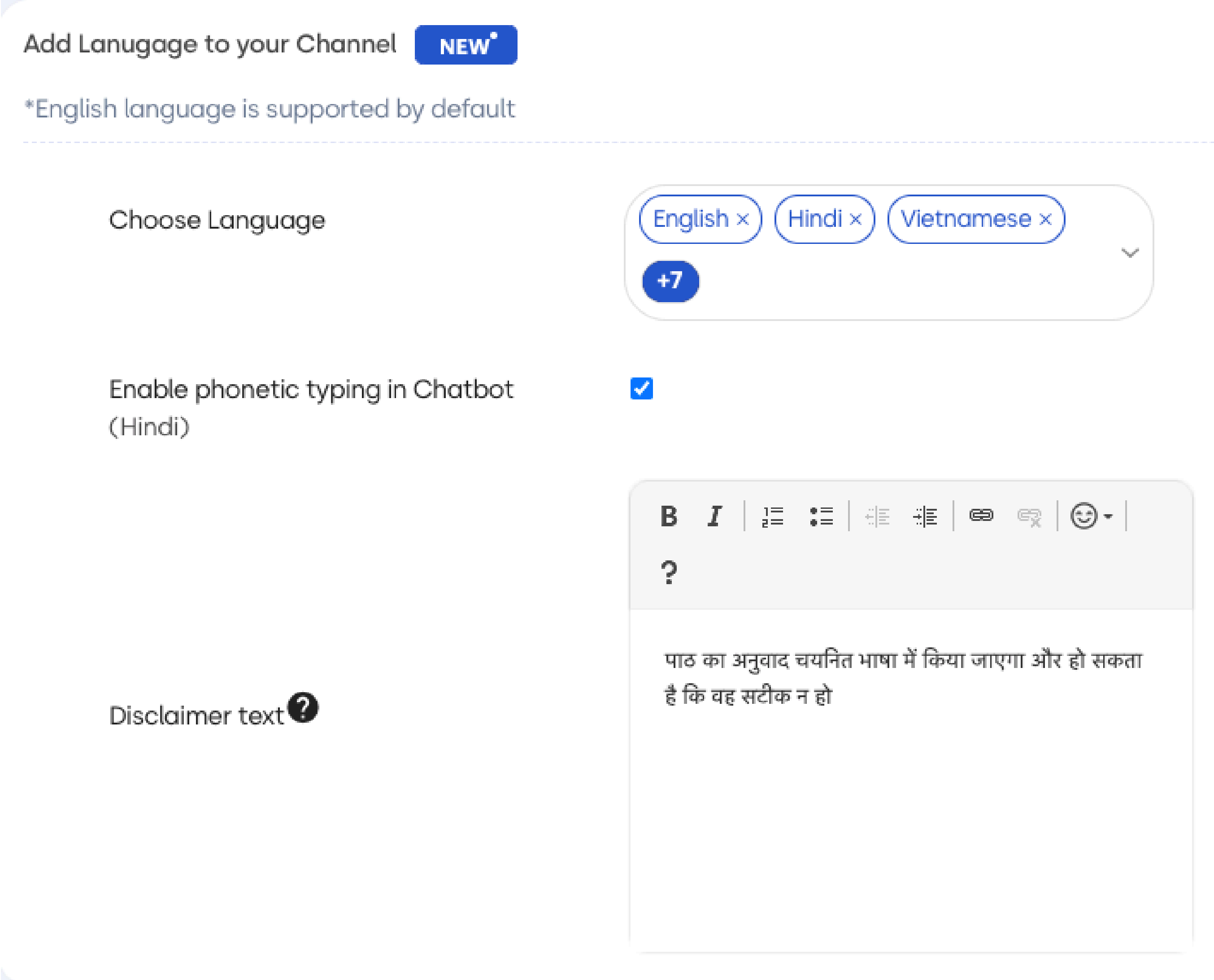
Refer the below shown demo for better understanding or click here



Please note : (Limitations) Even if the "Enable choose a language menu for customers with the welcome message" is enabled and if the user queries in other languages then also the Bot will auto-detect the language and provide a response in the languages the user has queried (If the language is available).If there is only 1 selected language i.e. only English, then toggle would not be visible. If the user types/chooses “No” as an option while language change then a confirmation message to change language will not be provided in that session again.Django admin will be given an option to configure the tolerance of language detection based on the confidence level. The confidence level for any language is a score that determines the accuracy with which the engine translates a language and lies between 0 to 1. Using this option, Django admin will be able to configure the tolerance level upto which the bot will translate a language.

By default the confidence level would be kept at .75, i.e., if the confidence level for a language would fall below 0.75, the system will not auto translate that. If this is increased or decreased, the bot will function accordingly.If phonetic typing is enabled for Hindi after confirmation for auto switching to hindi we will not ask any other confirmation.Phonetic Typing When The End-User Switches The Language To HINDI

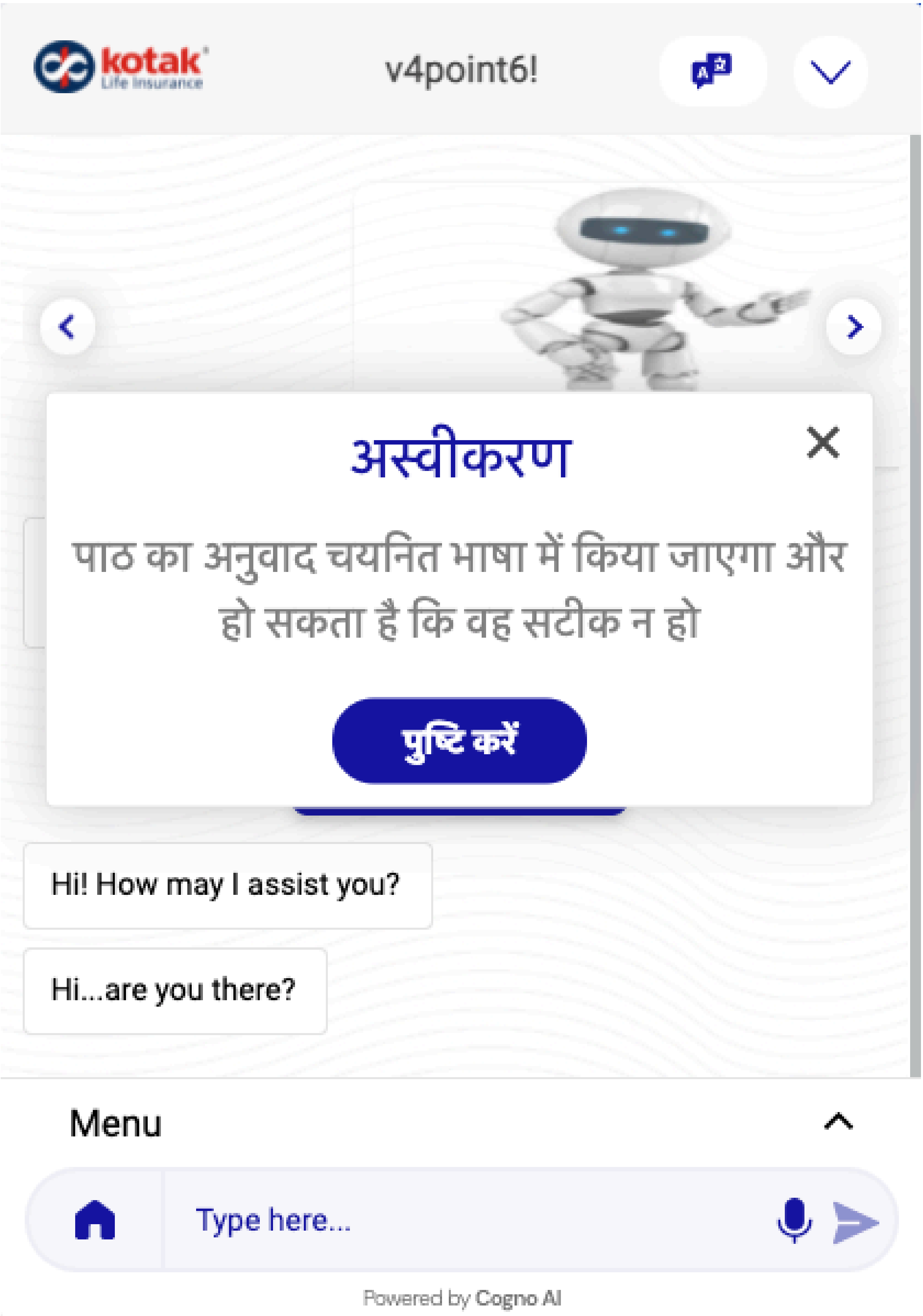
To enable this go to Bot Configuration > Select Channel > Add Languages to your channel > Select **HINDI** in the dropdown > Enable Phonetic Typing in Chatbot



Note : This is available across **21 different languages**.List of languages:

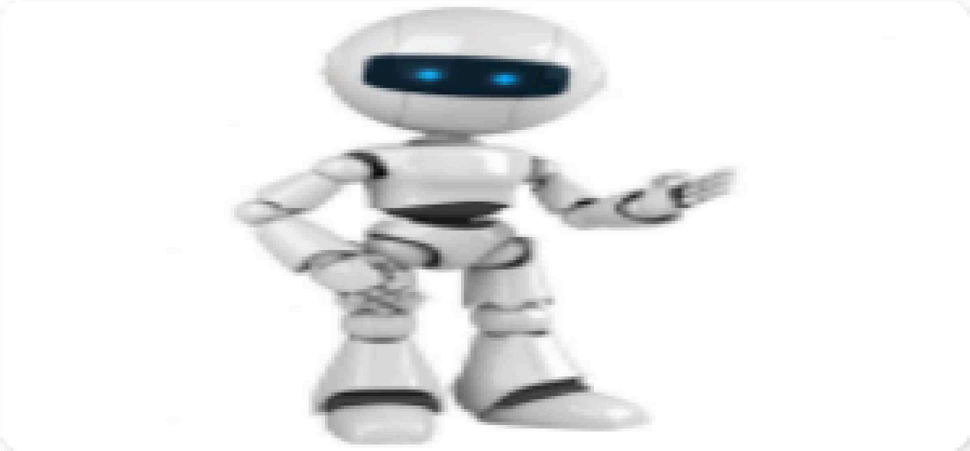
ENGLISH	NEPALI	SERBIAN	URDU
AMHARIC	ORIYA	TAMIL	KANNADA
ARABIC	PERSIAN	GREEK	MALAYALAM
BENGALI	PUNJABI	GUJARATI	
CHINESE	RUSSIAN	HINDI	
MARATHI	SINHALESE	TELUGU	

A disclaimer text will be shown when the user switches to phonetic typing and the text will be configurable after the option “Enable Phonetic Typing in Chatbot” is enabled in the console. A default text will be shown as shown below


kotak
Life Insurance
v4point6!
अस्वीकरण
पाठ का अनुवाद चयनित भाषा में किया जाएगा और हो सकता है कि वह सटीक न हो
पुष्टि करें
Hi! How may I assist you?
Hi...are you there?
Menu
Type here...
Powered by Cogno AI

kotak Life Insurance

v4point6!



अरे कॉग्नो एआई चैट बॉट में आपका स्वागत है !!?..

हमारे एजेंट से जुड़ें

एक मुद्दा उठाओ

किसी विशेषज्ञ से चैट करें

नमस्ते! मैं आपकी कैसे सहायता कर सकता हूँ?

हाय क्या आप वहां हैं?

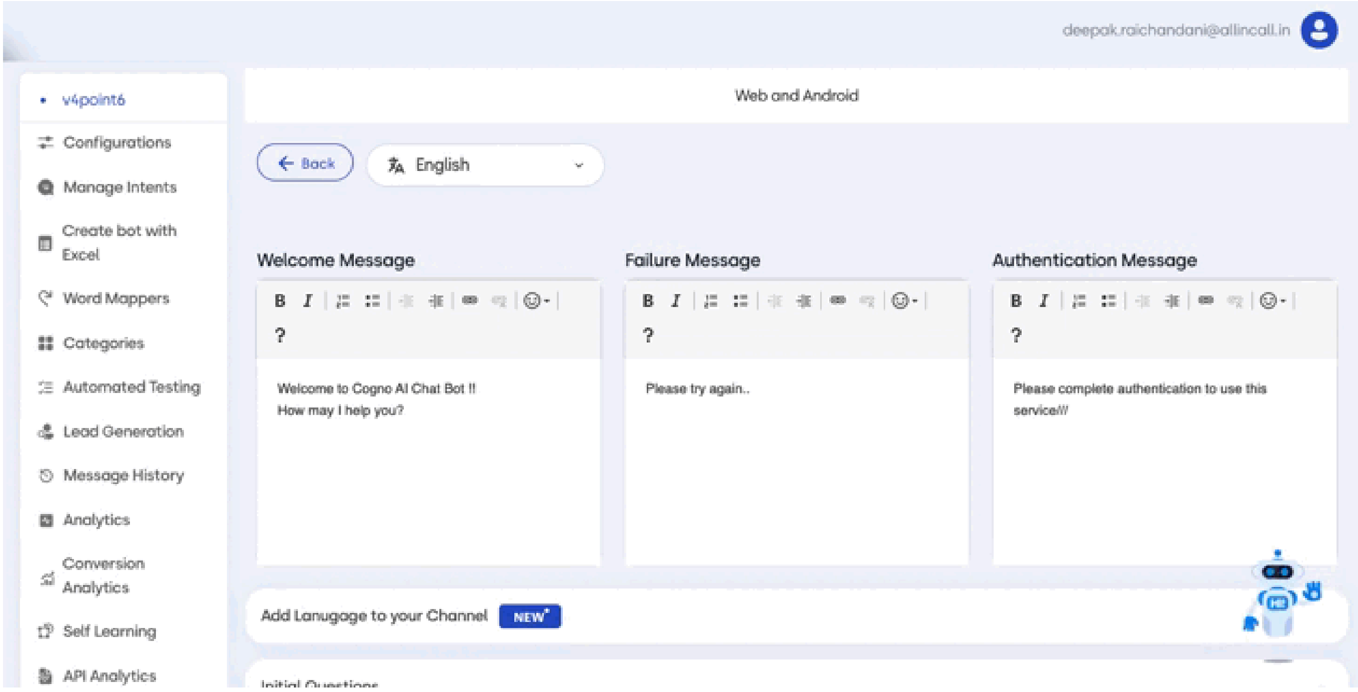
मेन्यू

यह एक नया feature

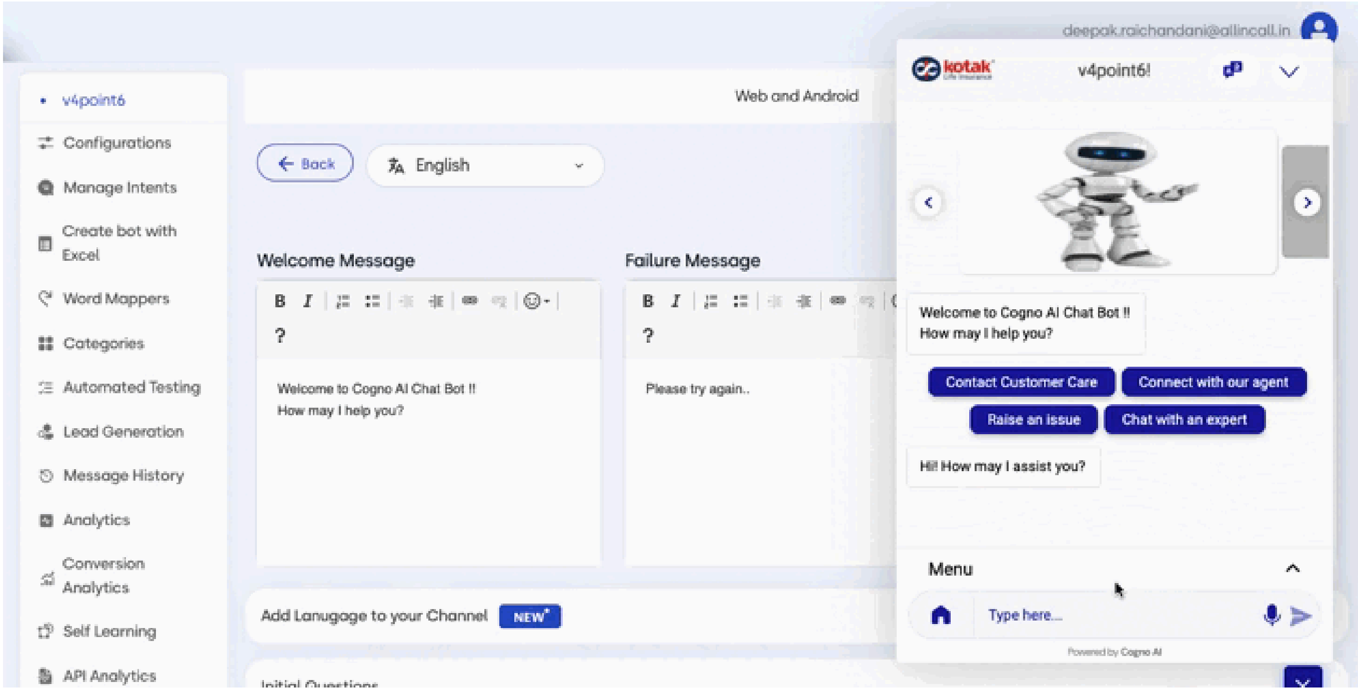
Powered by Cogno AI

Refer the below shown demo for better understanding

Vernacular Query Bot Side



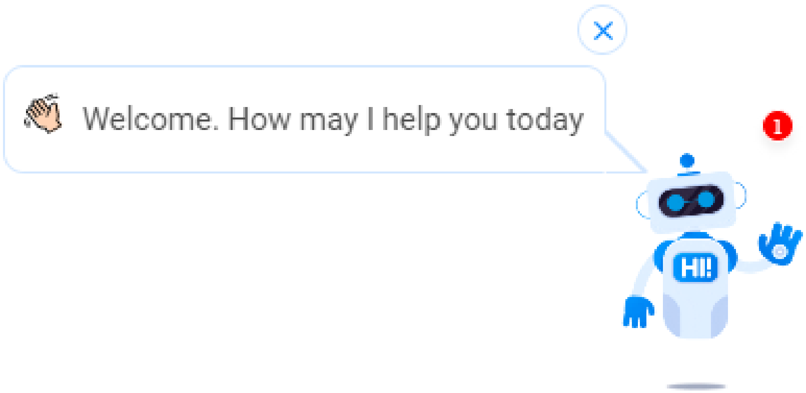
Vernacular Query Bot Side



Auto Pop-Up Settings

Admin can also set the auto popup settings for the bot auto pop up for Mobile and Desktop, pop up timer different type of auto popup i.e.

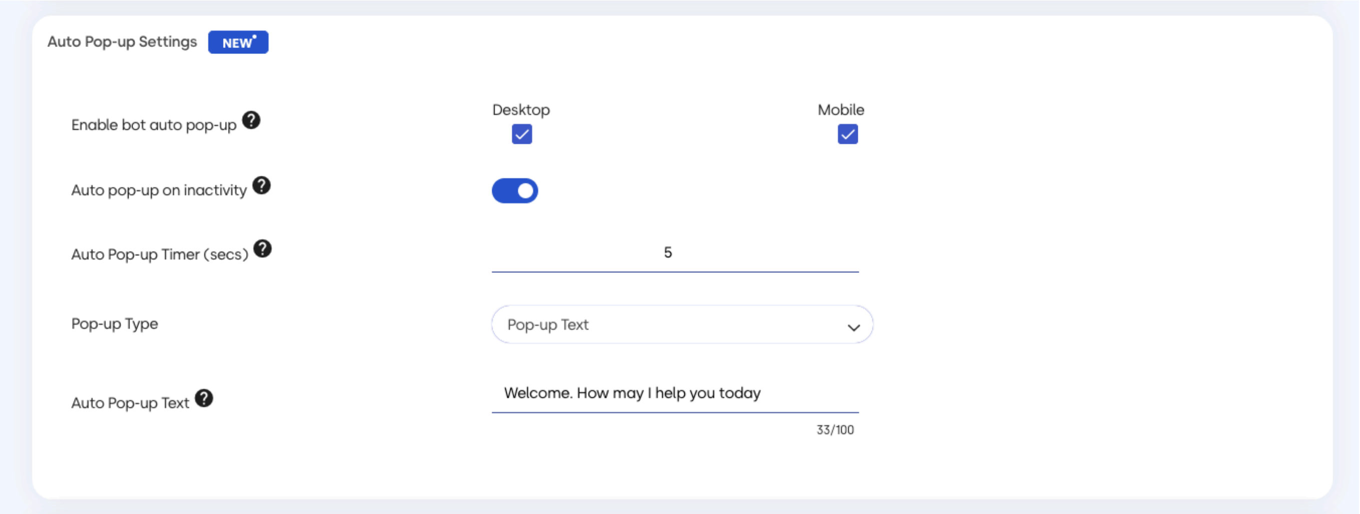
1. Bot auto popup- Bot will auto popup after the set timer.
2. Popup text- A configurable message can be displayed as a greeting bubble to the user.



Auto popup on inactivity

Enabling this toggle would auto pop-up the bot when a user is idle on a website.

To configure : This is visible under : Chatbot Console > Configure Bot > Integrate Channels > Web > Auto Pop-up Settings



Enabling this toggle would auto pop up the "Pop-Up Text", "Intent Bubble" or "Bot Auto-up" when the user is inactive based on the set "Pop up type".

Disabling this toggle would auto-pop up the bot irrespective of user activity.

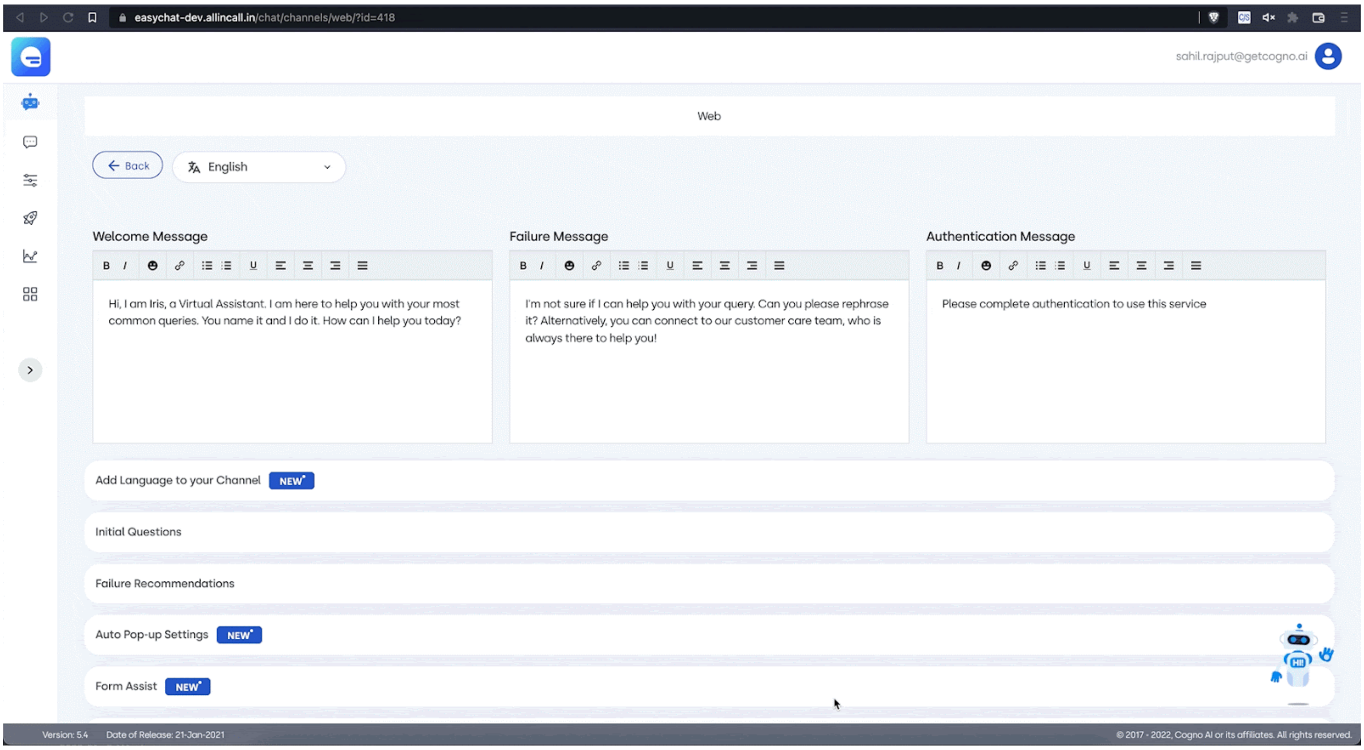
Please Note :

This is kept enabled by default.

If the user turns on the toggle for Bot auto pop-up on inactivity the checkboxes for auto pop-up settings in Desktop and Web should get turned on by default. However user can turn off any checkbox post that based on his requirement

When the inactivity toggle is enabled the "Pop-up Type" dropdown must get automatically set to "Pop-Up Text". This can be changed to Intent Bubble/Bot Auto Pop-up.

Refer the below shown demo for better understanding



The greeting bubble functionality is browser session based i.e in a single browsing session greeting bubble will be shown only once. This is applicable to the following cases:

- If the user has interacted with the bot in any way.
- If the user has closed the greeting bubble.
- If the user opens the bot even before the greeting bubble pops up.

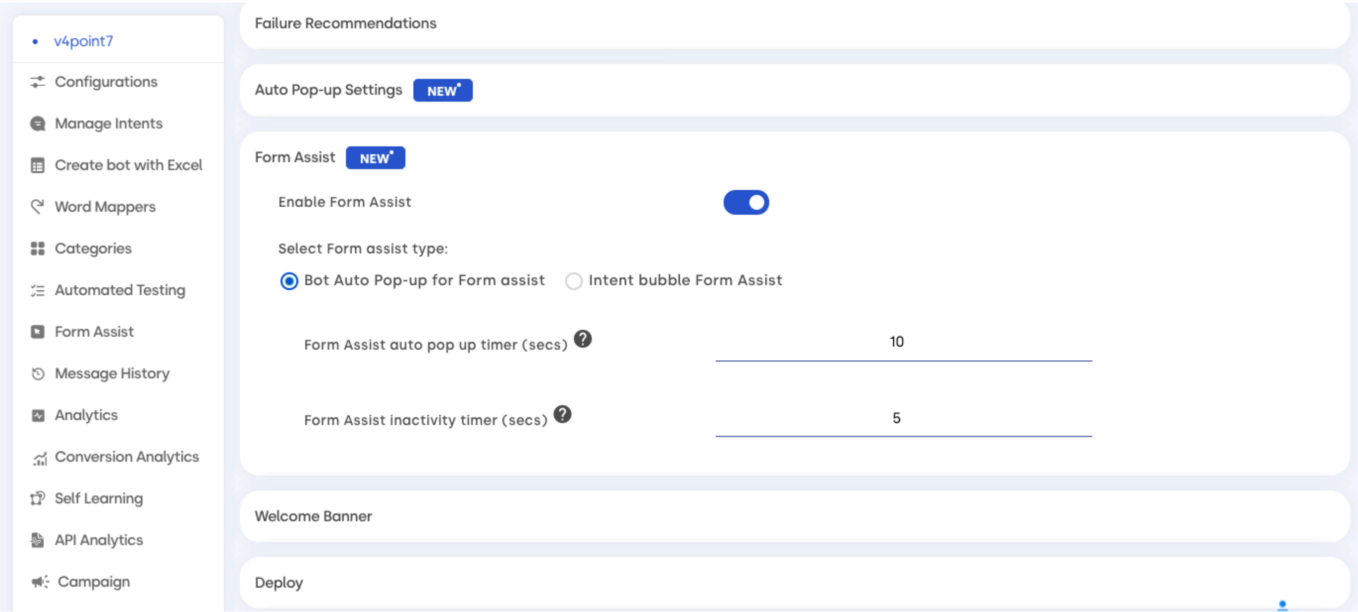
Please note: This is applicable to all available themes and all types of auto pop-ups available. Enable Form Assist functionalityThis enables the Form assist Functionality in the bot. This can be useful when any user is stuck while filling any form and the respective intent is called. An option is provided to enable an intent bubble for form assist when the user is inactive on that selected field.

This is visible unders Configurations > Channel > Select Web channel > Form Assist

On enabling Form assist, two options will be available in the format of radio buttons: 1. Bot Auto popup for Form Assist 2. Intent bubble Form assist

1. Bot Auto popup for Form Assist

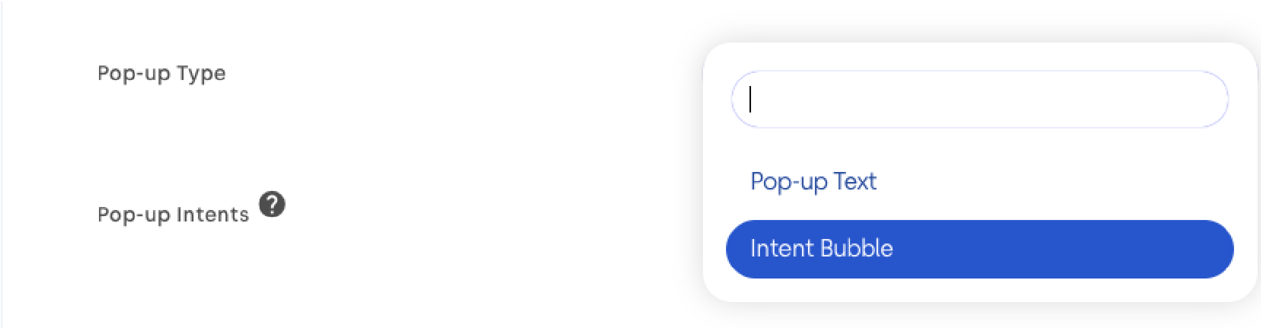
- **Form Assist auto popup timer(secs)**- Bot will Auto popup if the user is inactive and not focussed on any field.
- **Form assist inactivity timer (secs)**- Bot will Auto popup if the user is inactive and focussed on any field.

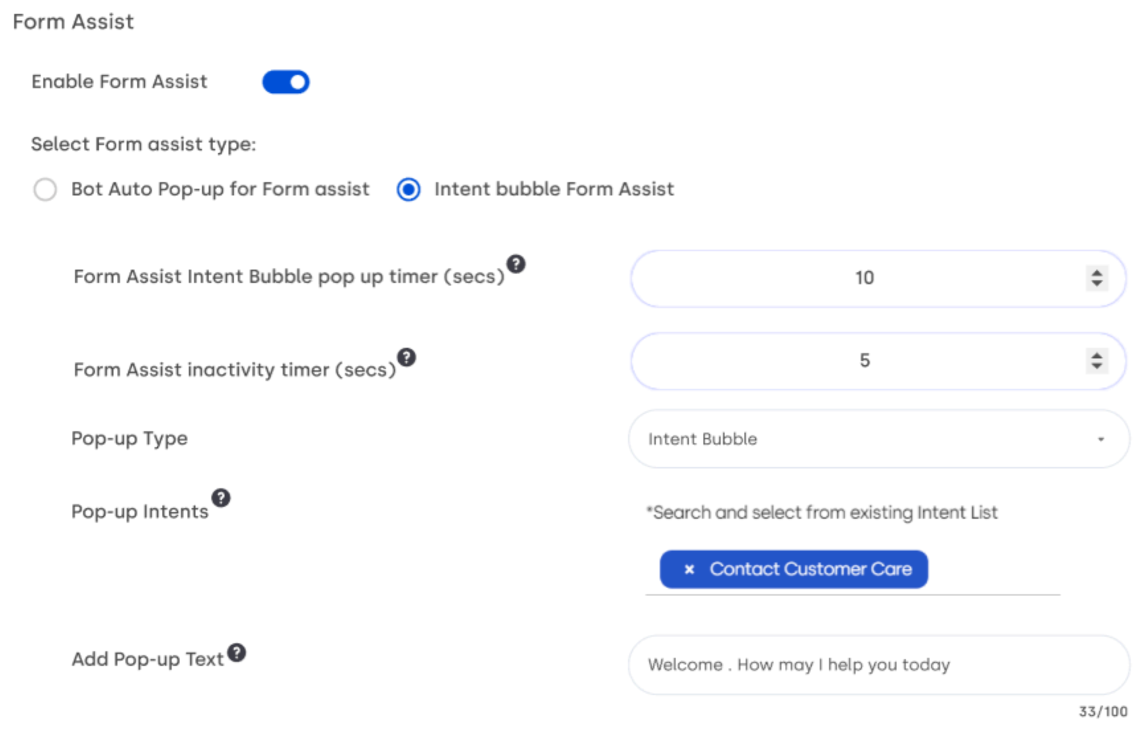


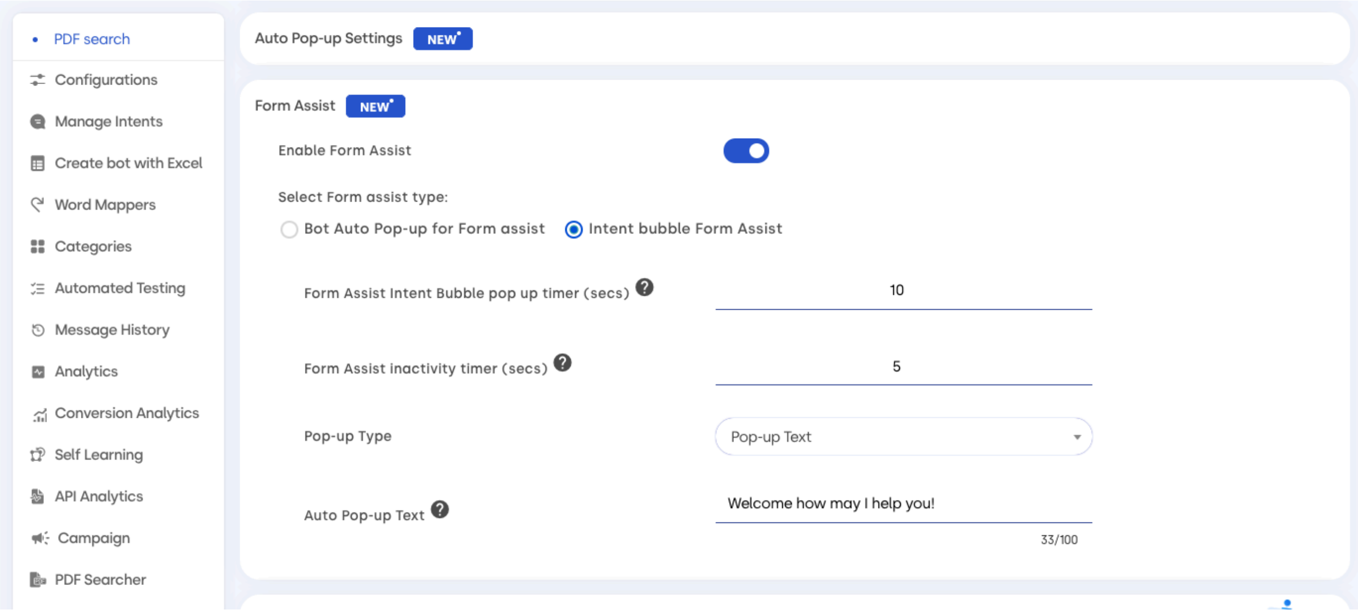
1. Intent Bubble Form Assist

- **Form Assist Intent Bubble popup timer(In secs)**- The Intent bubble will Auto popup if the user is inactive and not focused on any field.
- **Form assist inactivity timer (In secs)**- The Intent bubble will Auto popup if the user is inactive and focussed on any field.

Popup type: 1. Pop-up text 2. Intent Bubble. By default "Pop-up Text" will be selected with the configurable text box below.

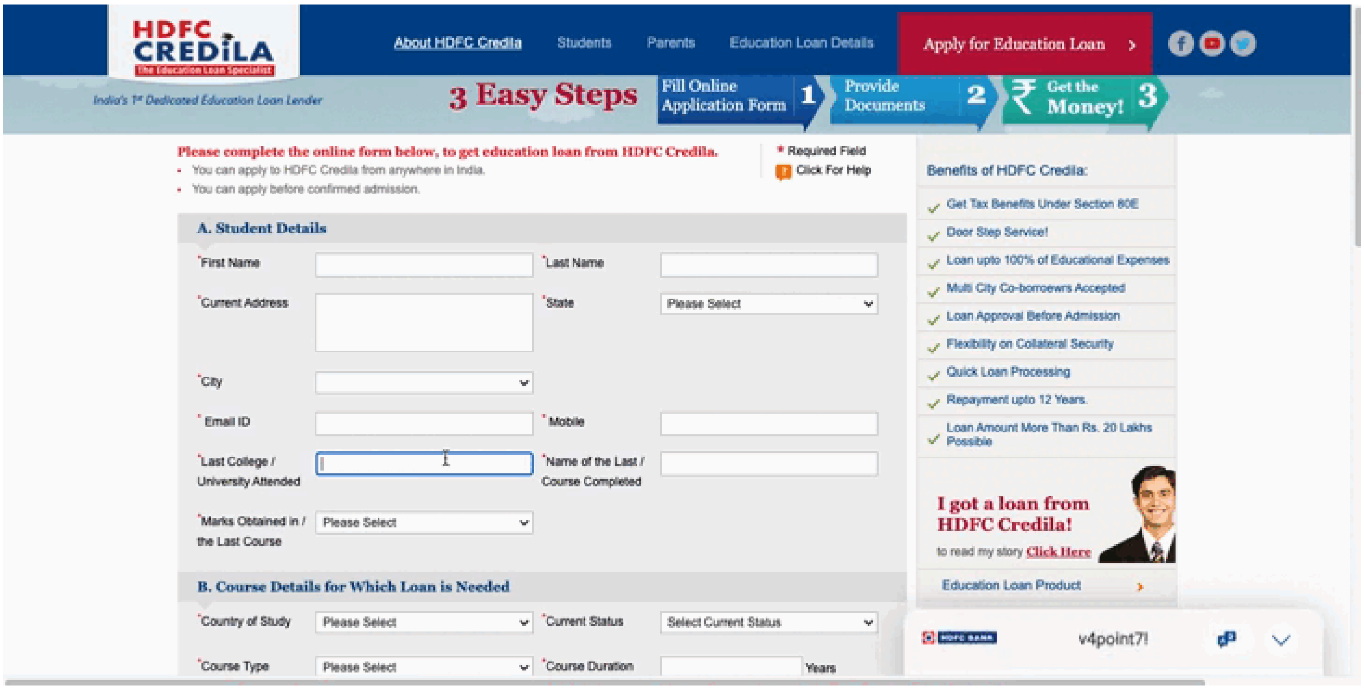

Pop-up Type
Pop-up Intents
Pop-up Text
Intent Bubble


Form Assist
Enable Form Assist
Select Form assist type:
Bot Auto Pop-up for Form assist
Intent bubble Form Assist
Form Assist Intent Bubble pop up timer (secs)
10
Form Assist inactivity timer (secs)
5
Pop-up Type
Intent Bubble
Pop-up Intents
*Search and select from existing Intent List
× Contact Customer Care
Add Pop-up Text
Welcome . How may I help you today
33/100



Note : Only if "Enable intent bubble for form assist" is selected then only the intent selected for the field on inactivity will popup. On clicking the bubble, the answer will be displayed and the rest of the functionality will remain the same.Also, On enabling "Form Assist" the options in Auto Popups settings will disable.

Refer the below shown demo for better understanding



Initial Questions

An option is provided in our console to set a "New" tag for intents in the Welcome Intents / Initial Questions to highlight them amongst the already existing ones.

To configure : This is visible under Configurations > Channels > Web > Initial Questions

Document image

An option is provided to add a "New" tag when adding intents for Initial Questions. To do so, simply select the intent and click on the "New" icon to select the tag for that particular intent.

To remove an intent from initial questions, user can search for the same intent in the dropdown and uncheck the adjacent checkbox. Also to remove the tag user can simply search for the intent in the same dropdown and re-tap on the adjacent "New" icon to deselect the tag.

A realtime preview for the welcome intents has been added in the same box adjacent to the dropdown menu so users can visualise how the welcome intents would look like when triggered inside the bot.

Refer the below shown demo for better understanding

Document image

Please note : (Limitations)

1. Intent's with the "New" tag will be displayed only when those intents are added in "Initial Questions" not when they are triggered in the middle of a flow.

Enable Voice Based Form Assist

The Bot Response of the Intent associated with the field will speak after the set popup time.On Enabling this, when the bot auto pops up the associated Intent's Bot response will speak out.

Document image

End customer experience

Mute/unmute option will be provided beside the Bot response when the option "Voice based Form Assist" is enabled.

Refer the below shown demo for better understanding or click here

Document image

Please note : (Limitations)

- The Speakout will only work for the Intent's Bot response which is associated with the field.

- If the user has selected "Intent bubble for Form assist" then, at the end customer side, the associated intent bubble will pop up and the intent's response will start speaking on the inactivity when focused on any field.

- The Bot will not speak unless and until the user performs any action with the Bot in case of Bot Auto popup. Landing on a different page after interaction with the Bot, the user needs to interact with the bot again for the Voice assist, due to technical feasibility.

- The Bot will not speak when the end customer is inactive on the page, the initial question and welcome text pop up.

- Intent bubble- Admin can select the different intents to be displayed and a message can be displayed as a greeting bubble to the user.
- Fine tuning Within the channels

This is applicable for the welcome message, Failure Message, auto-popup settings and Authentication Message.

Document image

Document image

Auto-fix for Non Primary Languages in Channels, Web Landing URL, Auto pop-up message when the primary language is edited, A warning would appear

"⚠ A change has been detected on this intent, Would you like to auto-fix your non-primary languages for this intent?"

[Ignore] [Auto-fix]Note : If the user chooses to [Auto-fix] - The corresponding D.B changes will be auto-generated. If the user chooses to [Ignore] - The corresponding D.B will remain the same as before

Document image

Document image

Custom Intent Bubble for Different Page

Providing an option to add different recommendations into the intent bubble based on the web pages.

To configure : This is visible under : Chatbot console > Integrate channels > Web > Auto popup settings > Pop up type = "Intent bubble" > Enable custom Intents for web pages

Document image

Chatbot console > Integrate channels > Web > Form Assist > Intent bubble > Intent bubble form assist > Enable custom Intents for web pages > Add intent for web pages.

Document image

If the user enables the option “Enable custom intent for web page”, a button is provided to add intents for the web page.

Clicking on **Add Intents for Web Pages** opens a modal for the users to enter the URL of the web page where they want to add these intents for along with the options to select the intents to be displayed in the pop-up.

Document image

Users will be able to Edit or Delete the selected added. Please note that the URL is not editable. Only the intent can be edited in this case.

Document image

Similarly the functionality is applicable for the Form Assist as well. Working of the feature remains the same as shown above.

For example: On the https://getcogno.ai/ user wants to display Cogno AI Services and Customer care as pop-ups and for the **Product** page a few more options like Chat with an expert, Book services and more, this can be done simply by add the URL of the page and selected intents as shown above.

Refer the below shown demo for better understanding

Document image

Please note : (Limitations)

1. If the End user visits a web page that is not a part of "Custom intent for web pages" then the global intent bubbles i.e "Pop-up Intents" will be displayed.

2. If the same web page is added for "Custom intent for web pages" and "Web URL landing" then Web URL landing will be having higher priority i.e clicking on the Popup text/Bot icon the Web URL landing functionality will work.
3. Remaining functionality workings remain the same for Auto Pop-up and Form Assist including its analytics.

Welcome BannerAdmin can customise the welcome banner by enabling automatic scrolling and can also set a time interval for the same (in seconds).

Document image

Admin can reorder the banner images without deleting the previous images. The image tiles are draggable and the user has an option to preview the set images.

Document image

An option of "Trigger Intent" and "Redirection URL with Trigger Intent" while adding a new Welcome Banner is provided.

This is visible unders Cogno Chatbot >Configurations > Channel > Select channel WEB > Welcome Banner >

Users can add Welcome Banner by clicking on the button "Add Welcome Banner". And then select the action type as shown below.

Document image

1. Redirect URL: This option will be selected by default, Users can add image/Image URL and Redirection URL(The URL where the end customer will be redirected to a new tab on clicking the welcome banner).

Refer the below given links for demo for better understanding **:**

- Redirect URL - Link

2. Trigger Intent- User can add Image/Image URL and select the intent which the EasyChat admin wants that should be triggered on the same page when clicked on the welcome banner.

Refer the below given links for demo for better understanding **:**

- Trigger Intent - Link

3. Redirection URL with Trigger Intent: User can add Image/Image URL, Redirection URL, and Intent. On clicking on Welcome Banner the user will be first redirected to the URL to a new tab and then the intent will be triggered in the Chatbot.

Refer the below given links for demo for better understanding **:**

- Redirect URL + Trigger Intent - Link

To configure this user needs to select the action type, add the banner image and then add URL/Select intent/Add URL and Select intent (as per the selection).

Refer the below given links for demo for better understanding **:**

- To Configure - Link

Note : URL Links, Intents selected can be edited.

Analytics : A column of the Intent trigger is added in the conversion analytics-> Welcome banner click rates. A similar column is added to the excel sheet.

Document image

Another UI element that can be configured here are- **sticky buttons**.Admin can choose certain intents that will be permanently shown to the user at the bottom of the chat screen, above the input text area.

Document image

Document image

Web URL Landing Options: By specifying the webpage and the intent, the admin can allow multiple webpages to have multiple initial intents to be triggered when users land on the chatbot.

Document image

Document image

Admin can use Web URL landing options.

Document image

Deploy : By providing the website link we can deploy the bot on the provided website link according to business needs.Also on AMP pages.To Deploy :

Document image

Document image

Other Settings:

Bot Input Field Toggleable

Provided an option in the console to disable the input text field. Applicable across all themes.

To configure : This is visible under : Chatbot Console > Select Bot > Configure Bot > Integrate Channel > Web/Android/iOS > Other settings > Enable Input TextField

Document image

By default this will be kept enabled in the console. Disabling this will remove the input text field across all themes. Only the following list of options will be accessible by the end-user to start/ continue the flow:

- Initial Questions
- Bot responses they wish to show as per the business use case (applicable to all types of responses)
- Child Intents
- Response Widgets for specific inputs required as per business use case
- Quick recommendations in Sticky buttons / Menu format

Please note: This task is only applicable for the following channels - Web, Android & iOS.Also, the functionality for all the above-mentioned response types remains the same as before (respective to their themes).

Refer the below shown demo for better understanding

Theme 1 Theme 2

Theme 3 Theme 4

Admin can also customize the UI by configuring the following:

- Image and Video to be shown in welcome response
- Bot position on the website
- Allowing user to minimize the web bot icon to ensure a smooth website browsing experience
- Change theme colour of the bot as per business needs
- Upload a bot icon as per business needs
-

In web settings, Admin can also choose among the four different UI themes from : This is visible under : Chatbot Console > Select Bot > Configure Bot > Integrate Channel > Web/Android/iOS > Other settings > Change theme version > **Select preferred theme**

Document image

- **Theme 1**

Document image

Document image

- **Theme 2**

Document image

Document image

- **Theme 3**

Document image

Document image

- **Theme 4**

Document image

- **Company/Bot Logo**

It is now configurable from the console.

This is visible under Configuration > Select Channels > Other Settings > Choose Bot Logo > Click on Upload Bot Logo and choose an image to upload.

Document image

Note : File size should be less than 200KBFeature available for both themes

Refer the below shown demo for better understanding

Document image

Bot UI Configuration from Console

Providing an option to set gradients for the chatbot from the console.

To configure : This is visible under Chatbot Console > Configuration > Channel > Web > Other Settings > Enable Gradient.

Document image

Enable Gradient : Enabling this checkbox would apply a gradient on the bot navigation bar based on the selected theme colour.

In case the colour code is selected and “Enable Gradient” is checked the following elements will be updated for **“Theme 2”** :

- Bot NavBar
- Minimise Icon on Bot Action Bar
- Minimise Icon below bot
- Stroke on "Type box"
- Quick recommendation and welcome intents
- Icons inside "Type Box"

In case the colour code is selected and “Enable Gradient” is checked the following elements will be updated for **“Theme 3”** :

- Bot NavBar
- Minimise Icon below bot
- Stroke on "Type box"
- Home Icon inside "Type Box"

Refer the below shown demo for better understanding

Document image

Please note :

1. For theme 2 and theme 3 only.
2. Will be enabled by default.

Disable Auto Popup in the Minimized State

Providing an option for users where on clicking the minimize icon all the popup will be blocked until and unless the user manually maximizes it.

To configure : This is visible under : Chatbot > Configure Bot > Integrate Channels > Web > Enable Bot icon minimization > Disable Auto popup in minimized state

Document image

If the option 'Enable Bot icon minimization' is enabled then a toggle 'Disable Auto popup in minimized state' will be available. Please Note : This will be **off** in default state.

On enabling **Disable Auto Popup in minimized state**, all the popup settings configured will not popup in the minimized state until and unless the user manually maximizes the Bot icon. (Refer to the image shown above or click here).

For the Customers :

When Enabled : the auto popup settings(pop up text, Bot auto popup, Intent bubble), Web URL Landing, Campaign and form assist will work till it is in the maximized state i.e the user has not clicked on minimize icon.

Please Note :

- The bot will not maximize even on page refresh or switching tabs. It will only maximize when the customer clicks on the maximize icon.
- If clicked on the cross icon for the greeting bubble, it will not pop up when maximized again. Applicable for auto popup intents as well.
- All the inactivity timers will reset after clicking on maximize.

Refer to the below shown demo for better understanding or click here.

Document image

GenAI Experience

Overview

The GenAI Experience is an enhancement that includes the **Message Streaming & Copy Experience,** which enhances how bot text messages are displayed in the chat interface.

When enabled, bot text responses appear gradually (similar to modern conversational AI interfaces) and include a built-in **Copy** option for easy reuse.

This feature improves the visual experience of chatbot conversations without changing any bot logic, flows, or responses.

What This Feature Does

When enabled:

- Bot **text messages** are displayed with a streaming effect (instead of appearing instantly)
- A **Copy icon** is shown beside every bot text message
- The copy option allows users to quickly copy the full message content

This enhancement applies only to **text messages**.

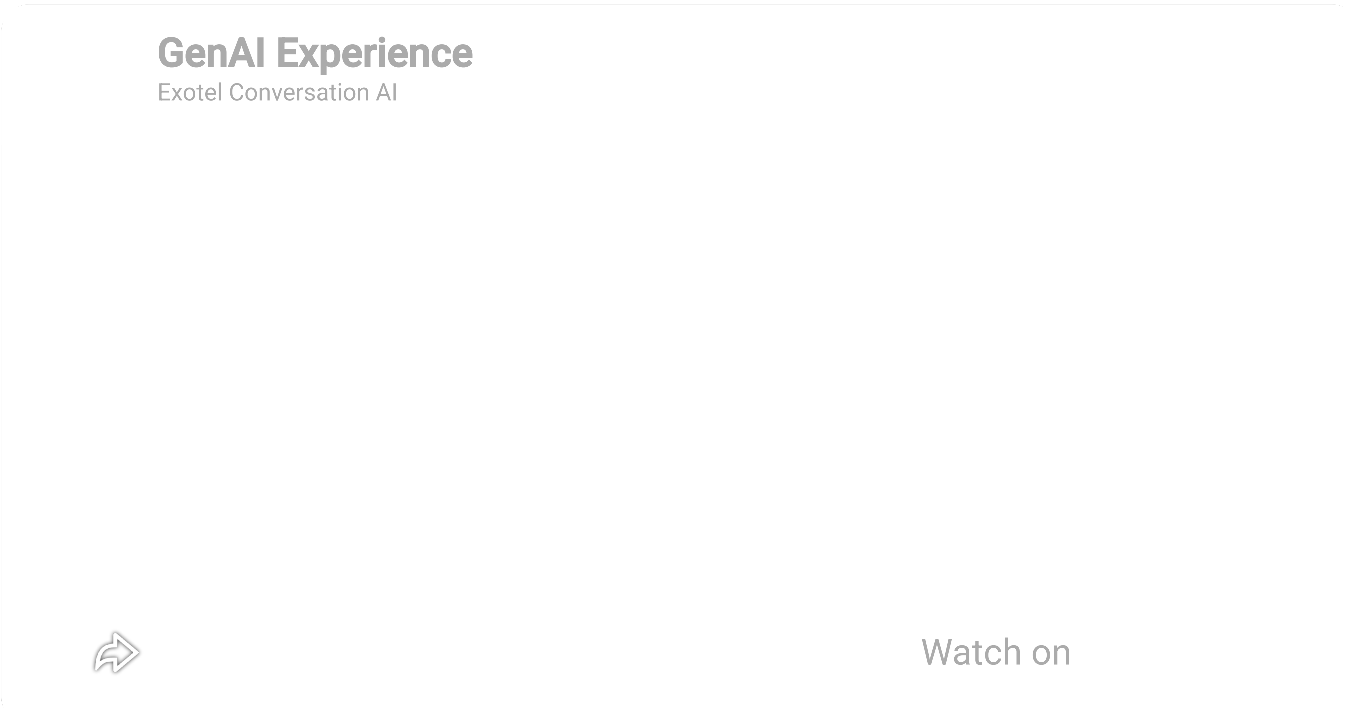
It does **not** affect:

- Input components (Radio, Checkbox, Date, Time, etc.)
- Cards or structured components
- Bot response logic
- AI or NLP behaviour

1. **More Conversational Experience**: Messages appear progressively, making conversations feel smoother and more natural.

2. **Improved Usability**: Users can quickly copy important information shared by the bot (e.g., reference numbers, summaries, instructions).

3. **Zero Impact on Existing Bot Logic**: This is a UI-only enhancement. Your bot flows, automations, and configurations remain unchanged.



How It Works

- The feature applies at the **theme level**

- When enabled:
  - Bot text messages stream visually
  - A copy icon appears beside each text message
- When disabled:
  - Messages appear instantly (default behaviour)
  - The copy icon is hidden

This feature works independently of:

- Intent-level feedback settings (Thumbs Up / Down)
- Speak Out Loud (TTS) settings

Those features continue to operate based on their own configurations.

Where to Find It

1. Go to **Theme Settings**
2. Select the theme you want to configure
3. Locate the toggle for **Message Streaming & Copy Experience**
4. Enable or disable as required
5. Save your changes

Changes will apply to all bots using that theme.

Important Notes

- Streaming applies **only to text messages**
- Structured components and inputs are not affected
- No changes are made to bot logic or AI capabilities
- The feature can be enabled or disabled at any time

1.2.2.2. WhatsApp Channel

Channels - Whatsapp

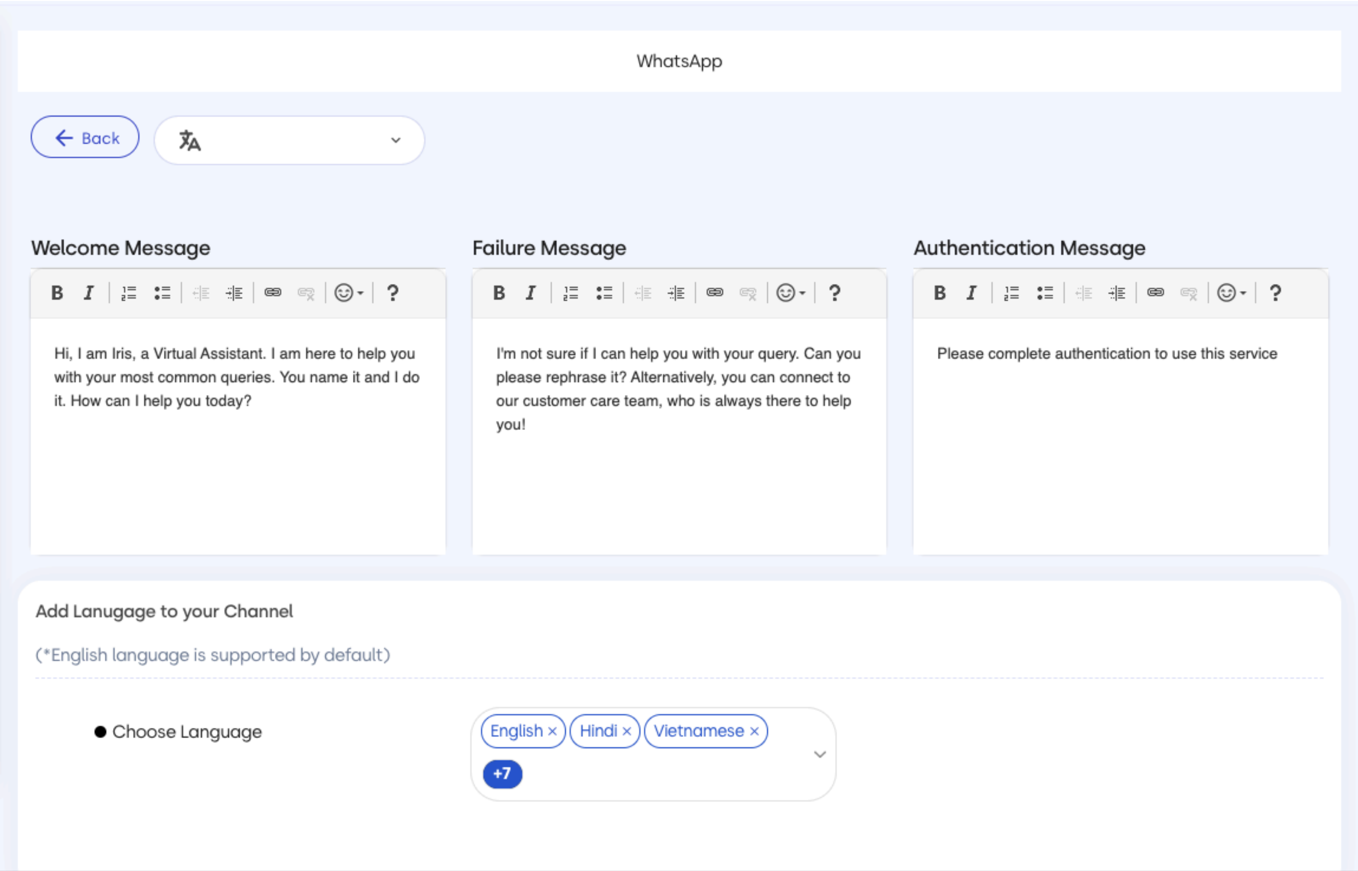
Feature name	Definition
Welcome/Failure/Authentication Message	Customizable text for Failure and Authentication messages to be shown to the end-user when interacting with the bot.
Initial questions	The initial set of queries post welcome message are configurable(you can select which intent to show as suggestions)
Failure recommendations	When an intent is not recognized a failure message is displayed as a bot response with the provided failure recommendation intent selected.
Language Supported	Admin can select different languages from the front end for the respective bot and the customer gets an option to select from the drop down in which language he wishes to use the bot. Languages supported are English, Hindi, Vietnamese, Tamil, Telugu, Kannada, Malayalam, Oriya, Gujarati, Bengali.
Deploy Links	Link which we provide to our whatsapp vendor as webhook URL
Other settings	Add image in welcome response.Add video in welcome response.Whatsapp Number used for chatbot integration.Enable Emails for Endpoint failure.
Advanced Settings	WhatsApp Webhook Configuration

- **Welcome/Failure/Authentication Message-Customizable text for Failure and Authentication messages to be shown to the end-user when interacting with the bot.**
- Initial questions-The initial set of queries post welcome message are configurable(you can select which intent to show as suggestions)

- Failure recommendations-When an intent is not recognized a failure message is displayed as a bot response with the provided failure recommendation intent selected.

Languages can be configured based upon channels

This is visible under Configuration > Channel > Select the channel (WhatsApp) > Add language to your channel > Select the languages to be added



For Whatsapp:

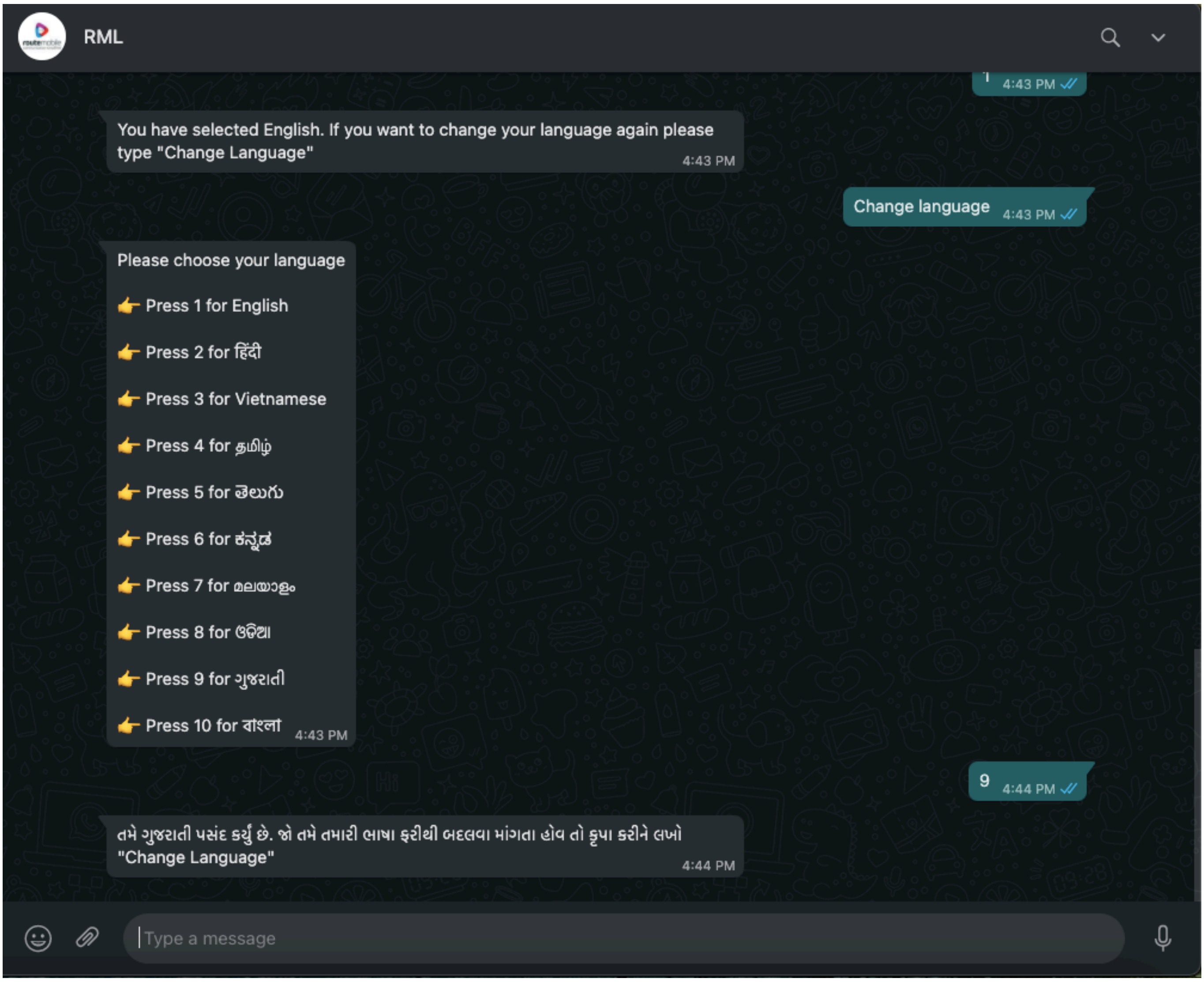
An intent "Change language" will give the response

Please choose your language Press 1 for English Press 2 for Hindi Press 3 for Vietnamese Press 4 for Tamil - தமிழ் Press 5 for Telugu - Press 6 for Kannada - Press 7 for Malayalam - മലയാളം Press 8 for Oriya - ଓଡିଆ Press 9 for Gujarati - ગુજરાતી Press 10 for Bengali - বাংলা

Response:"You have selected "[Language]. If you want to change your language again please type "**Change language**"

Note - The above response will come in the language selected and not English except the words "Change Language"

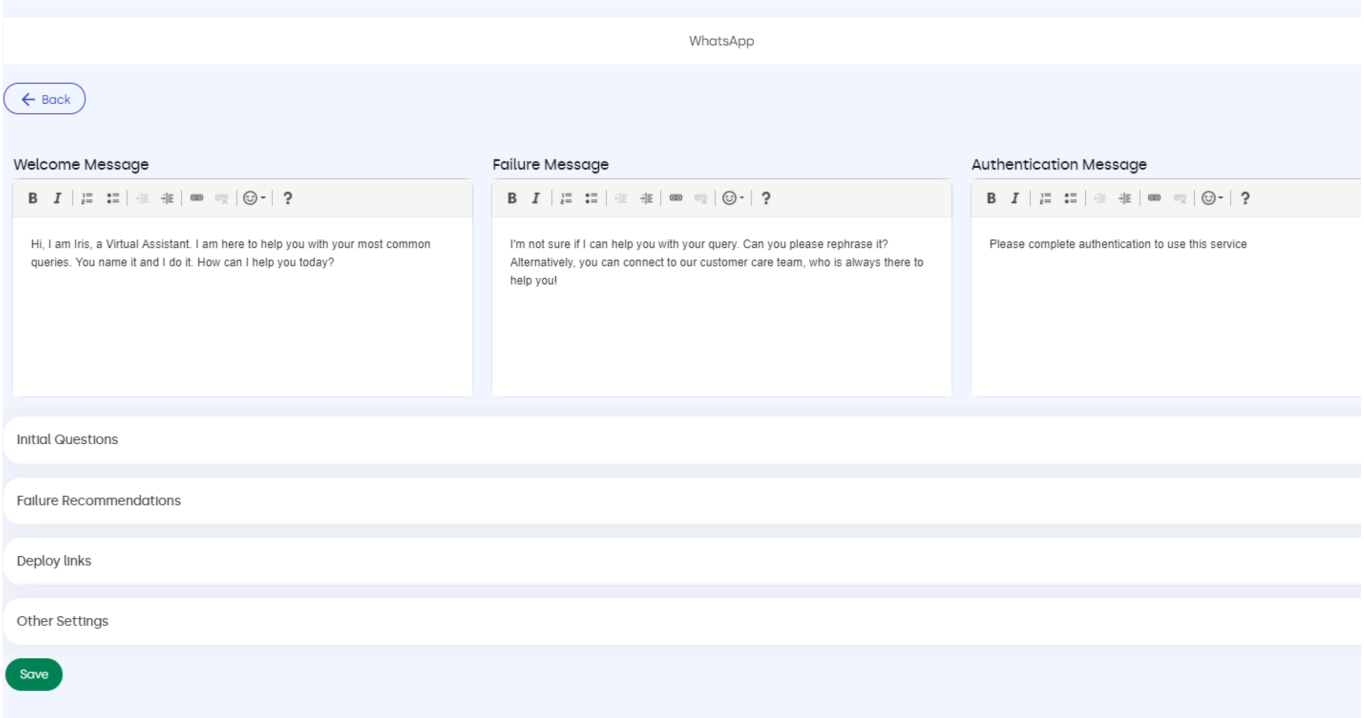
If only one language is set in the bot, then "Change language" will not get triggered.



New Languages added

100+ languages are available in our console for Web and Whatsapp are added

- Deploy Links- Link which we provide to our whatsapp vendor as webhook URL
- Other settings- Add image in welcome response, Add video in welcome response, Whatsapp Number used for chatbot integration, Enable Emails for Endpoint failure.



WhatsApp Webhook Configuration

WhatsApp - Chatbot This setting allows the users to integrate whatsapp vendor specific webhooks with bots. This will take the user to a new window where they can select BSP name from dropdown and configure the whatsapp webhook for that particular bot.

This is visible under ChatBot Console > Select the Bot > Configurations > Channels > WhatsApp > Advance Settings > WhatsApp Webhook Integrations > Go

On selecting **Whatsapp Webhook Integration** and clicking on go, the user can select a whatsapp BSP from the "Select WhatsApp BSP" dropdown. Once a BSP is selected for the first time, the default code of that BSP would get displayed in a code window below the dropdown.

Please Note :

If a BSP is already configured with a particular bot that selection would automatically get displayed in the BSP dropdown. Trying to change that BSP would show as alert as displayed below.

Selecting a different BSP will overwrite the existing code.

The "Save Configuration" and "Reset" button will only stay activated if an already configured code has been opened or some changes are made in the default code.

Clicking on "Save Configuration" will save the last code changes present in the code window. and clicking on "Reset" would ask for a confirmation (as displayed below) and clicking on "Confirm" would reset all the changes done and change the code to the default BSP code.

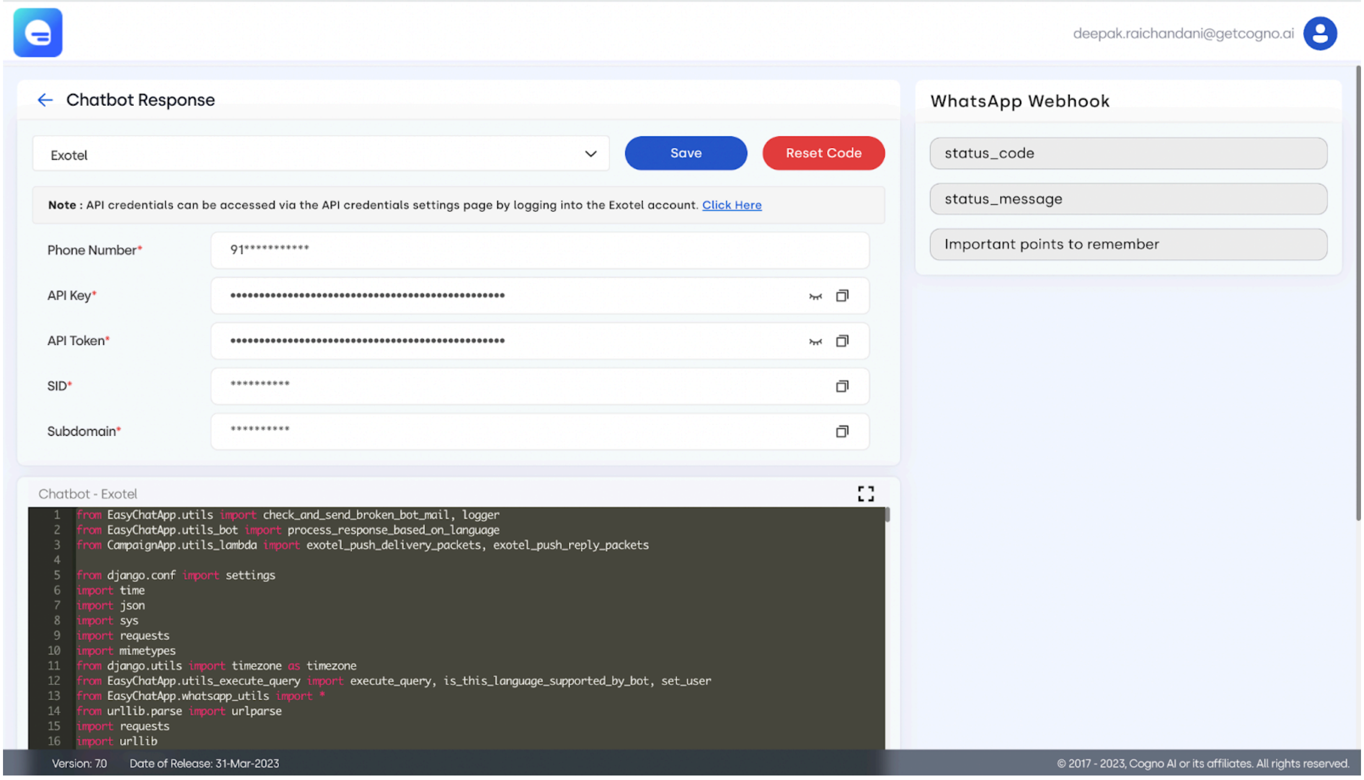
If a user shares a bot with a different id then both the users can collaboratively work on the webhook configuration code from their respective ids. (warning message stating "**Somebody is already working on this code"** will be displayed to User 2).

Please note : For now, only Exotel will be visible in the dropdown.

Exotel - WhatsApp Cloud API Integration

Providing an option for the console users to select & configure Exotel's WhatsApp Cloud API as the WhatsApp BSP.

This is visible under Chatbot Console Login > Home Page > Configure Bot > Integrate Channel > WhatsApp Channel > Configure Webhook & Credentials > Select WhatsApp BSP > **Exotel** > Add Credentials



WhatsApp Bot Interactive Buttons (Phase 1)

Integrate Whatsapp interactive messages with our chatbots by developing a new webhook integration code for different supported BSPs

Interactive Messages (Phase 1)

1. **List Messages: Messages including a menu of up to 10 options. This type of message offers a simpler and more consistent way for users to make a selection when interacting with a business.**

To configure : **List Messages**These can be sent for an intent by creating the intent and adding user selectable actions as intents inside Intent > Quick Recommendations.

Message Body : TextField Value from 'Bot Response'**List Header :** Can be specified inside Intent > Other Settings > WhatsApp List Message Header (by default "Option" should be displayed as header text if the user doesn't specify anything.**Row Title :** These are the individual action items in the list and the value for each list comes from the intent names added inside "Quick Recommendations" of that particular intent**Static Send Button**

Note : List messages can also be triggered from child intent names if the number of child intents exceeds 3. In that case, the Row Titles would be taken from the child intent names and action calls the corresponding Child Intents

1. **Quick Reply Buttons: Messages including up to 3 options —each option is a button. This type of message offers a quicker way for users to make a selection from a menu when interacting with a business. Reply buttons have the same user experience as interactive templates with buttons.**

To configure : **Quick Reply Buttons**These can be sent by creating upto 3 child intents of a particular intent. Where the child intent names get displayed as button text and clicking on those buttons returns that particular intent.

Message Body : TextValue from 'Bot Response' of corresponding intent**Button Text :** Child Intent Name**Button Actions :** Calling the corresponding Child intent

Note : If more than 3 child intents are created for a particular intent, a "List Message" would be shared (And not Quick Reply buttons) where each child intent name would be each item in the list, and selecting a particular item and clicking on send would call that corresponding intent.To configure : This is visible under Intent > Other Settings > WhatsApp List Message Header > Specify the text of a list header

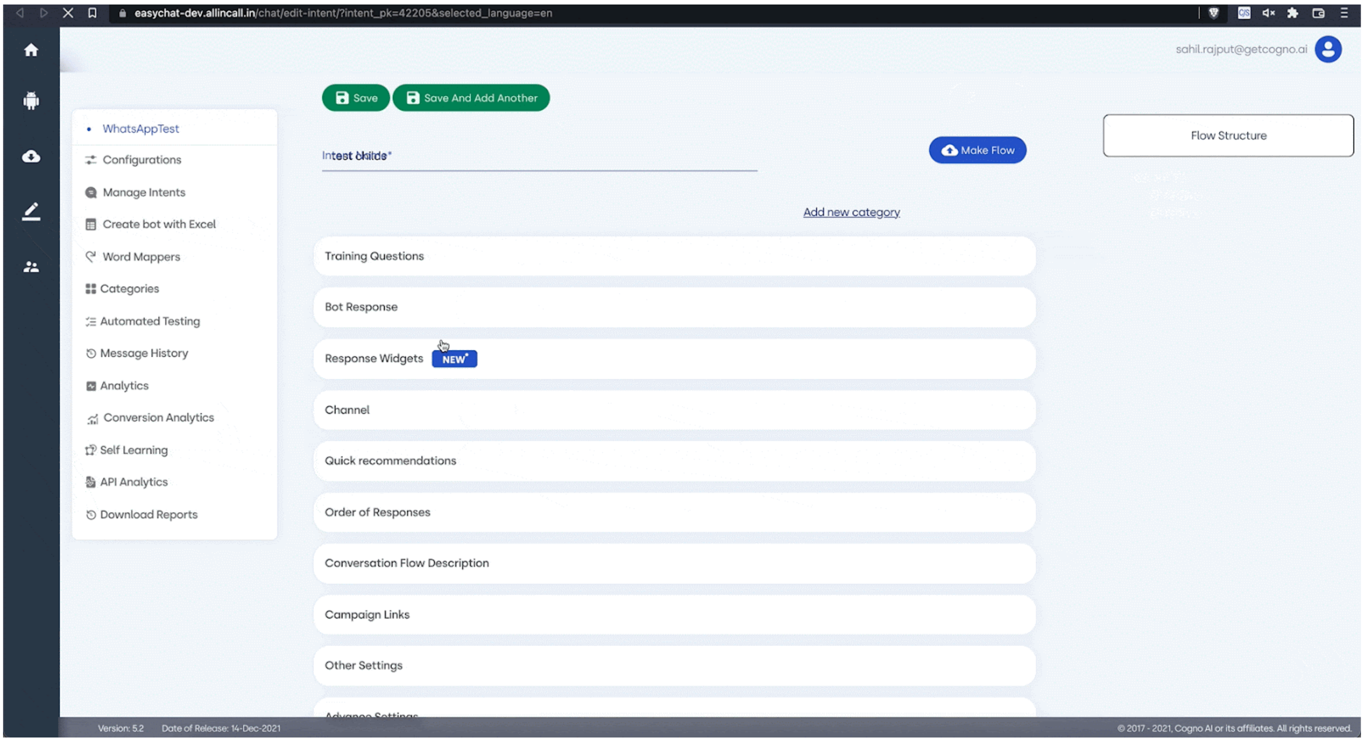


Image refers to versions older than 6.3

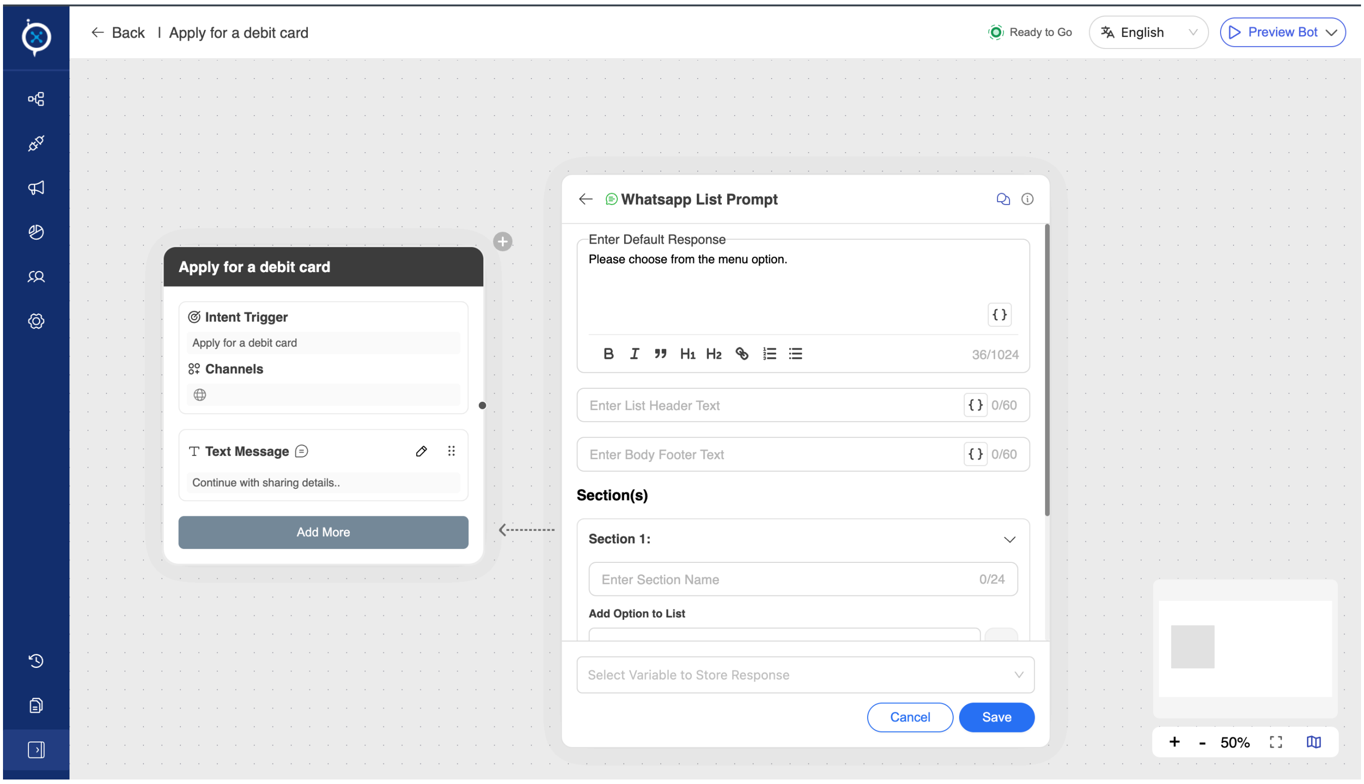
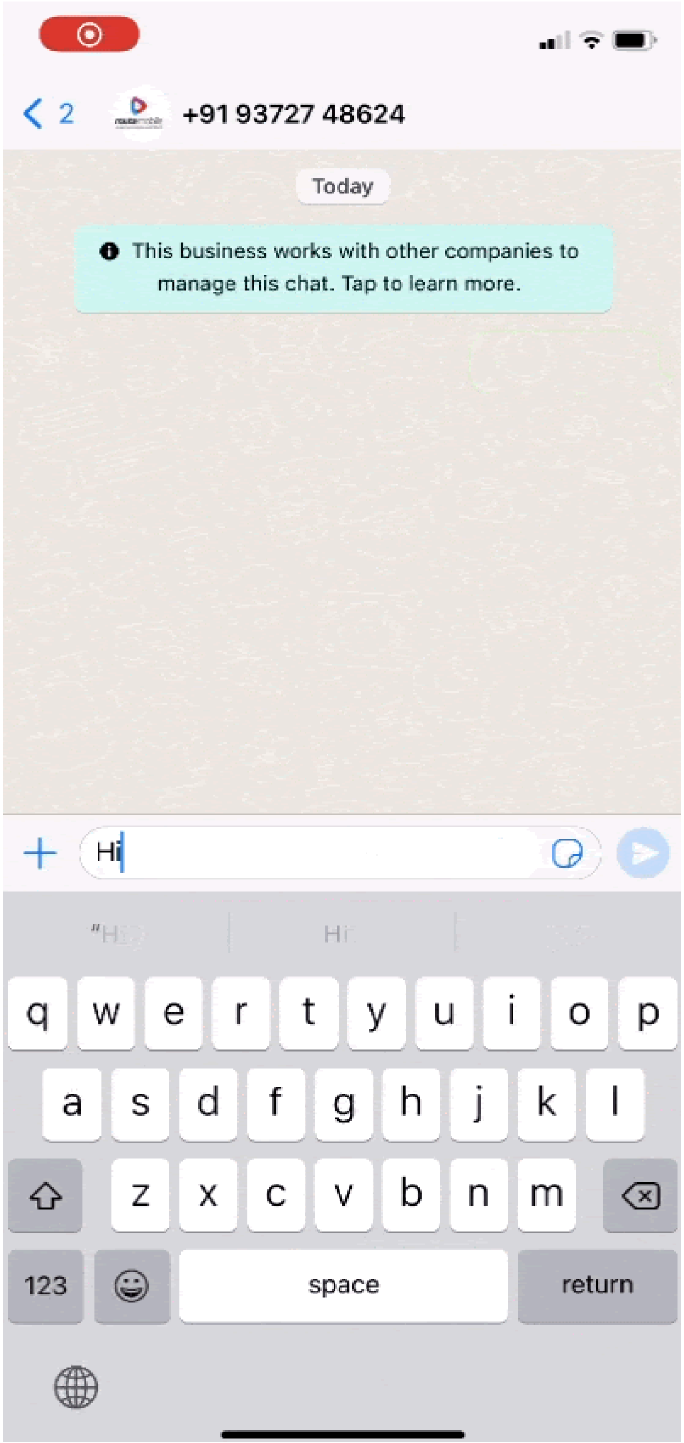


Image refers to versions 8 and onwards

Refer the below shown demo for better understanding

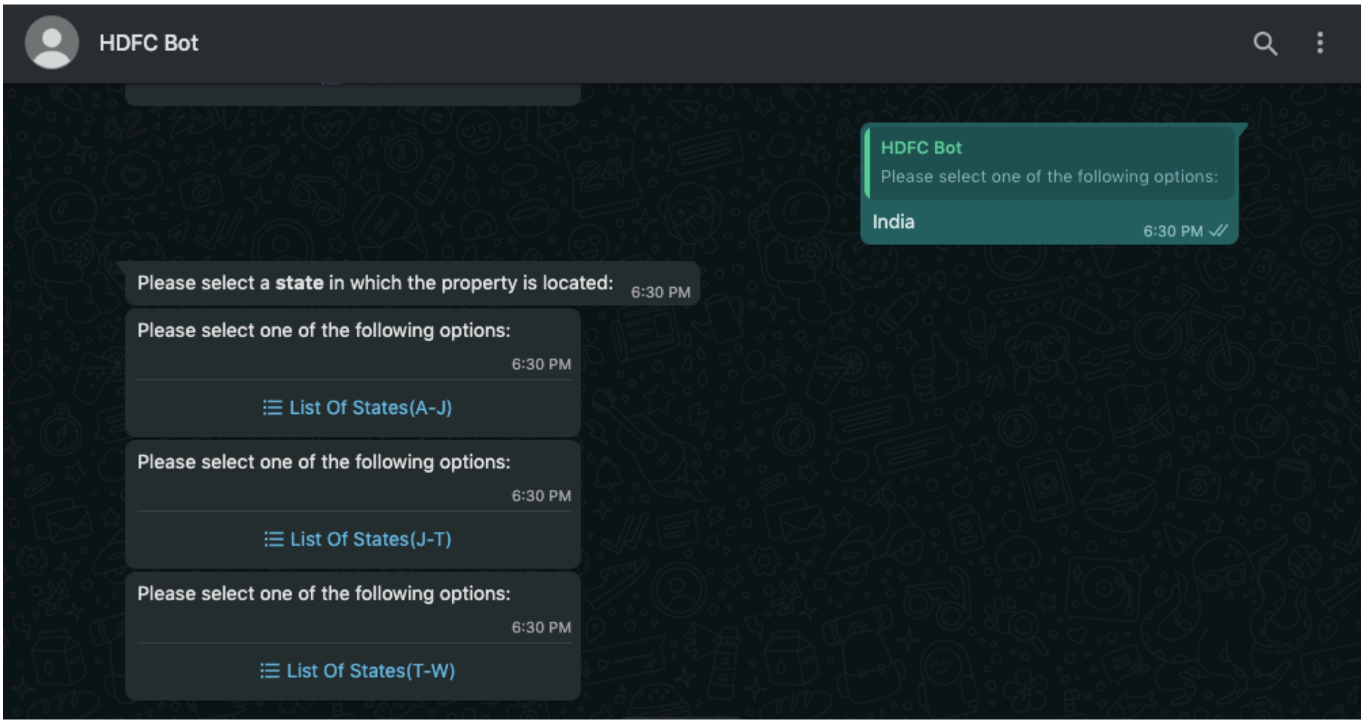


Please note :

1. In case the number of child intents for a particular intent exceeds 3, a list message would be shared when that intent gets called by the customer on whatsapp bot.
2. In case a particular intent has 3 child intents as well 5 quick recommendation suggestions, a quick reply would be shared with button text from the child intent names and their corresponding actions, no visibility of quick recommendations should be there in that case

3. In case a particular intent has more than 3 child intent and values inside quick recommendations as well, a list message would be sent using button text from the child intents and their corresponding actions can be called by selecting them and clicking the "Send" button
4. Since there are character limitations for buttons, reply content and bot response, in cases where the char limit has been reached we should represent the same using "..."
5. In case a list message is having more than 10 values the list message should be split in multiples of 10 and should be sent as separate lists. In that case the list header text of the lists would bear an additional value. For example in case of 2 lists having 10 items each the name of the first list header would be "Options 1-10" and for the second list it would be "Options 11-20".
6. Please note : 1-10 and 11-20 is the additional value that must be appended with the list header name (Specified in Intent > Other Settings > WhatsApp List Message Header) and this additional value would come dynamically based on the number of items present in each list.

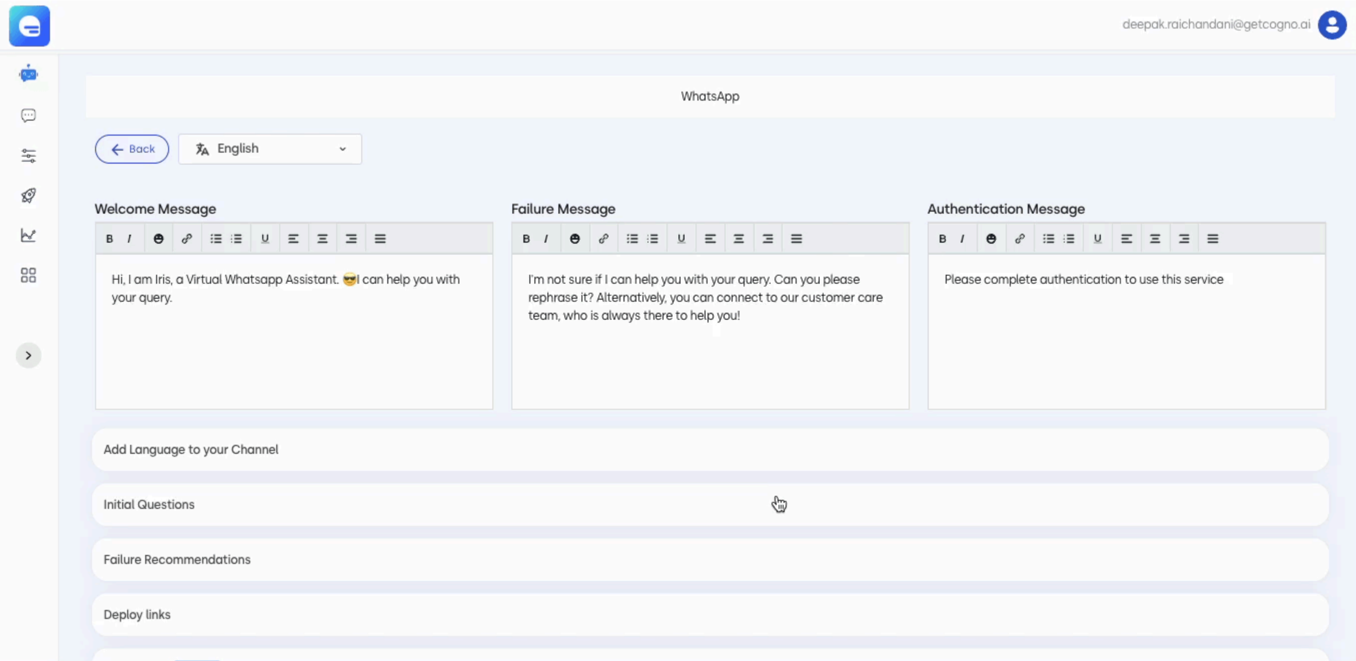
Eg. Here "List of States" is the List Header and (A-J), (J-T) are additional dynamic values. However in our case, this should be numerical based (1-10, 11-20 etc as specified above).



Block Spam Users on WhatsApp

Blocking attackers/users based on the number of messages/keywords.

To configure: This is visible under Chatbot > Configure Bot > Integrate Channel > WhatsApp > Block Spam Users

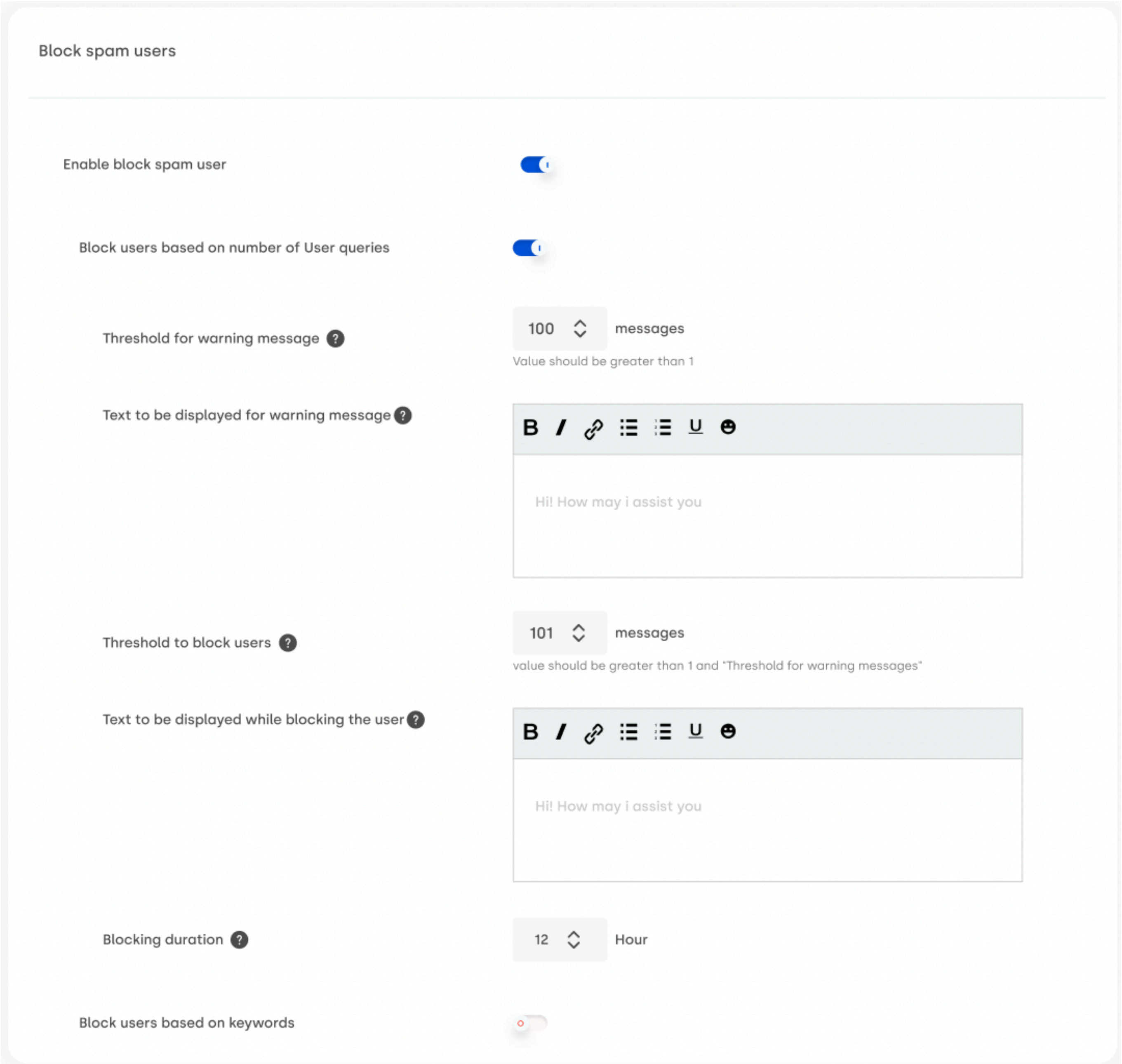


Please Note: On enabling the toggle "Enable block spam user", the "Block users based on a number of users queries" toggle will be enabled.

Block users based on the number of user queries Once the threshold set for the number of messages for a user in a session is reached the added warning message will be displayed. The warning message to be displayed is editable. The default value for the threshold for warning messages will be 100 messages and is editable. Also, the number of messages should be greater than 1.

The threshold to block user default value will be 101 messages. The value of the threshold for the number of messages will be saved as the threshold for warning messages +1.

Example: If the "Threshold for the number of messages" is 100 messages and the user tries to add 80 for the "Threshold to block users" then directly change the value to 101 messages in real-time.

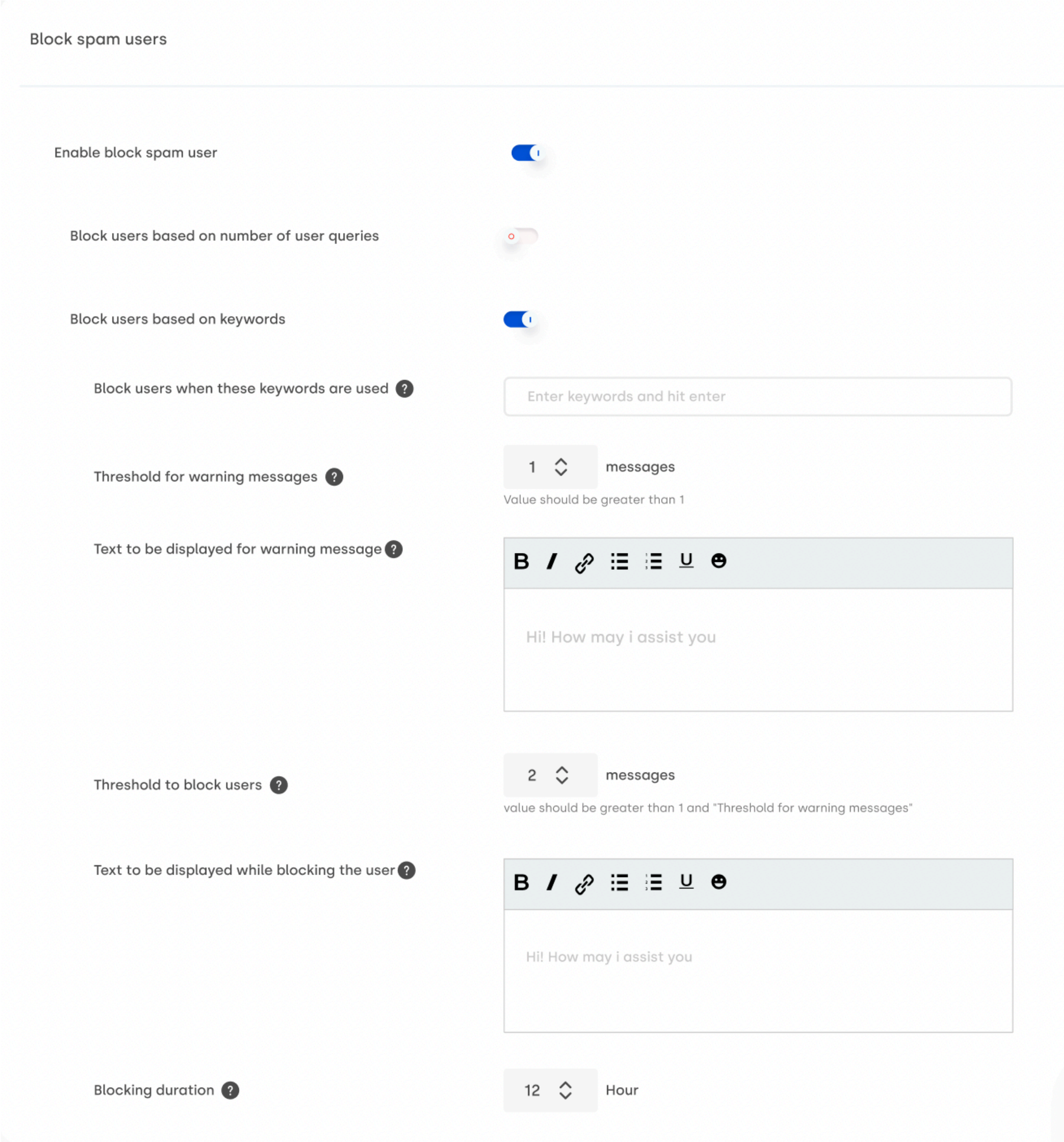


If the difference between "Threshold to block users" and "Threshold for the number of messages" is greater than 1 then if the user spams message then the bot will not reply to those user queries until the blocking message is thrown when the "Threshold to block users" is reached.

Once the user is blocked, the following message will be displayed: **You are blocked for 12 hours due to spamming a lot of messages.** The text to be displayed while blocking the message is editable.

Blocking duration will be set to 12 hours by default and is editable as per the requirement. Users will be able to interact with the bot only after the set duration. Queries done by the user will not be available in message history when the user is blocked.

Block spam users based on keywords



The bot admin can type the keyword in the input field and hit enter to add it to the list. Users will be able to add or remove any word as required.

Once the threshold set for the number of messages for a user in a session is reached the added warning message will be displayed. The warning message to be displayed is editable. The default value for the threshold for warning messages will be 1 message and is editable. Also, the number of messages should be greater than 1.

The threshold to block user default values will be 2 messages. The value of the threshold for the number of messages will be saved as the threshold for warning messages +1.

Once the user is blocked, the following message will be displayed: **You are blocked for 12 hours due to spamming a lot of messages.** The text to be displayed while blocking the message is editable.

Blocking duration will be set to 12 hours by default and is editable as per the requirement. Users will be able to interact with the bot only after the set duration. Queries done by the user will not be available when the user is blocked.

Unblocking a user: An option in Django will be provided where the user can simply search the WhatsApp number and unblock the user before the system unblock time.

Analytics: A table is added in Conversion Analytics which will have a log of the WhatsApp Number, blocking type, keywords used, blocking date, and time.

The date available above can also be downloaded.

Blocked users (WhatsApp)

Range : 13 Jul 2022 to 20 Jul 2022

Search

Filter

Export

S.No.	WhatsApp Number	Blocking type	Blocking keyword	Block Date Time	Unblock Date Time
2	919073223091	Keyword	bad,bad,bad,bad	19 July,2022,1:03 pm	19 July,2022,3:03 pm
3	919073223091	Keyword	bad,bad,bad,bad	19 July,2022,1:01 pm	19 July,2022,1:02 pm
4	919073223091	Keyword	bad,bad,bad,bad	19 July,2022,12:52 pm	19 July,2022,1:00 pm
5	919073223091	Keyword	bad,bad,bad,bad	19 July,2022,11:25 am	19 July,2022,12:51 pm
6	919073223091	Keyword	idiot,idiot,idiot,idiot	19 July,2022,11:21 am	19 July,2022,11:23 am
7	919073223091	Keyword	bad,idiot,bad,idiot	19 July,2022,10:52 am	19 July,2022,11:02 am

1.2.3. Analytics

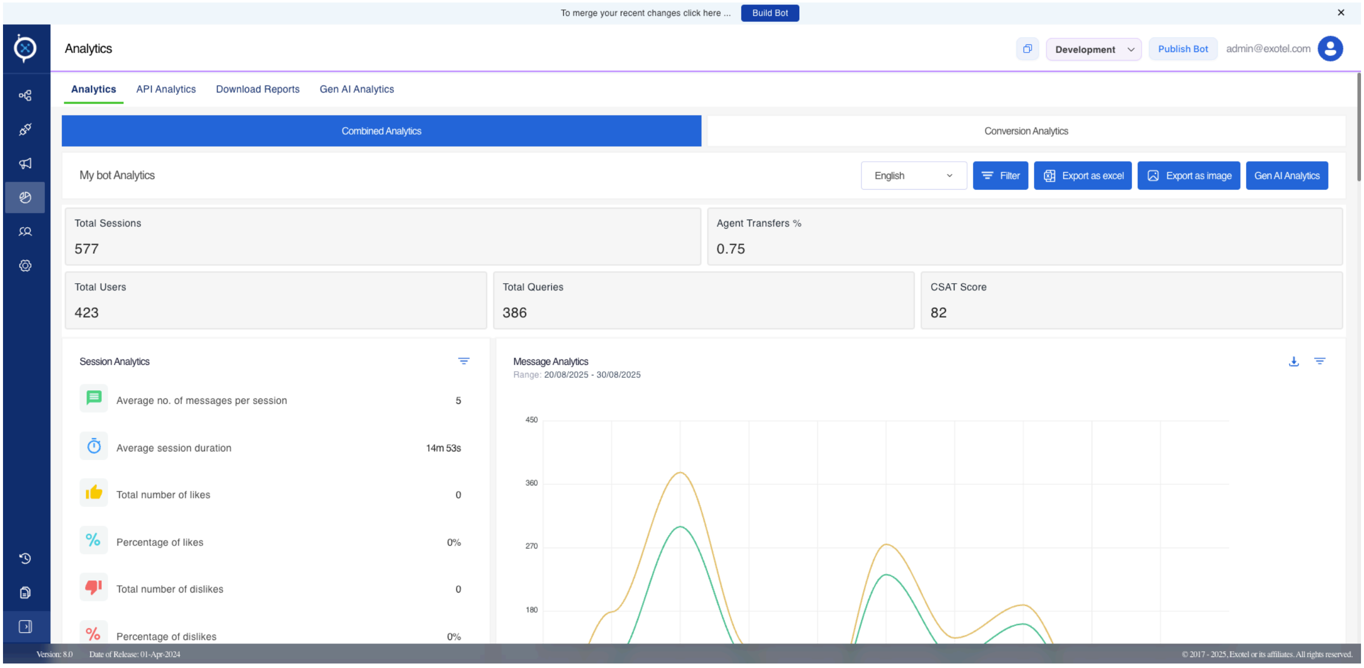
Overview

The **Analytics** module is the central hub for understanding and measuring your chatbot's performance, user engagement, and overall effectiveness. It provides a comprehensive suite of dashboards, graphs, and reports that transform raw interaction data into actionable insights. This module is essential for identifying areas of improvement, proving the bot's ROI, and making data-driven decisions to enhance the user experience.

The feature is broadly divided into two main sections:

- **Combined Analytics**: This is the main dashboard that provides a high-level, real-time overview of the bot's health. It includes key performance indicators (KPIs) like Customer Satisfaction (CSAT), total queries, user counts, session details, and channel usage. It's designed for quick, daily health checks.
- **Conversion Analytics**: This section offers a deeper dive into specific user journeys and goal-oriented interactions. It focuses on tracking the success rates of multi-step flows (e.g., lead generation, appointment booking), analyzing where users drop off, and measuring the effectiveness of features like LiveChat transfers and welcome banners.

By leveraging both dashboards, you can move from a broad understanding of "how the bot is doing" to a specific analysis of "why users are succeeding or failing" in key processes.



To merge your recent changes click here ...
Build Bot
Analytics
Development
Publish Bot
admin@exotel.com
Analytics
API Analytics
Download Reports
Gen AI Analytics
Combined Analytics
Conversion Analytics
My bot Analytics
English
Filter
Export as excel
Export as image
Gen AI Analytics
Total Sessions
577
Agent Transfers %
0.75
Total Users
423
Total Queries
386
CSAT Score
82
Session Analytics
Average no. of messages per session 5
Average session duration 14m 53s
Total number of likes 0
Percentage of likes 0%
Total number of dislikes 0
Percentage of dislikes 0%
Message Analytics
Range: 20/08/2025 - 30/08/2025
450
360
270
180
Version: 8.0
Date of Release: 01-Apr-2024
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1.2.3.1. Combined Analytics

Overview

The **Combined Analytics** module is a comprehensive dashboard that provides a 360-degree view of your chatbot's performance, user engagement, and overall effectiveness. It serves as the central hub for data-driven insights, allowing administrators to move beyond anecdotal evidence and make informed decisions based on quantitative metrics. The dashboard visualizes key data points through a series of interactive cards and graphs, covering everything from high-level user traffic to the granular performance of individual intents.

This feature is critical for understanding how users are interacting with your bot, identifying areas of success, and pinpointing opportunities for improvement. By analyzing this data, you can understand which features are most popular, when your peak traffic hours are, which channels are most effective, and where users might be struggling or dropping off.

Key capabilities include:

- **Performance KPIs**: At-a-glance metrics for Customer Satisfaction (CSAT), total queries, and user interactions.
- **Session and Message Analysis**: Detailed breakdowns of session duration, messages per session, and the ratio of answered to unanswered queries.
- **User Behavior Insights**: Analytics on user traffic sources, channel usage, device types (mobile vs. desktop), and hour-wise traffic patterns.
- **Content Effectiveness**: Reports on the most and least frequent questions, category-wise usage, and intuitive query performance to understand what content is resonating with users.
- **Flow Analysis**: A visual, intent-wise chat flow diagram to trace user journeys and identify drop-off points within conversations.

How to Use the Feature

This guide explains how to navigate and interpret the data presented in the Bot Analytics dashboard.

2.1 Navigating to the Analytics Dashboard

1. From the main console menu, select **Analytics**.
2. You will land on the main **Combined Analytics** dashboard, which provides a comprehensive overview.

2.2 Using Global Filters

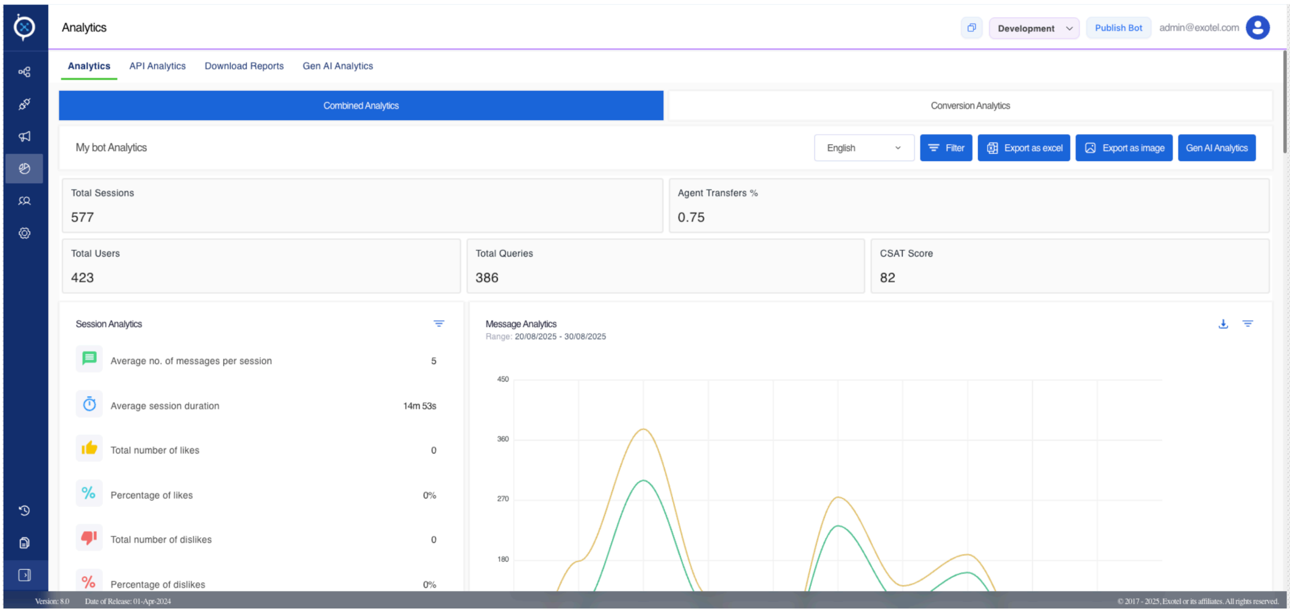
At the top of the dashboard, you can use global filters to refine the data you are viewing:

- **Filter by Date**: Select a specific date range to analyze performance during that period.
- **Filter by Channel**: Narrow down the analytics to a specific channel (e.g., Web, WhatsApp) to see how it performs in isolation.
- **Filter by Language**: View metrics for a specific language to understand the performance for different linguistic user groups.

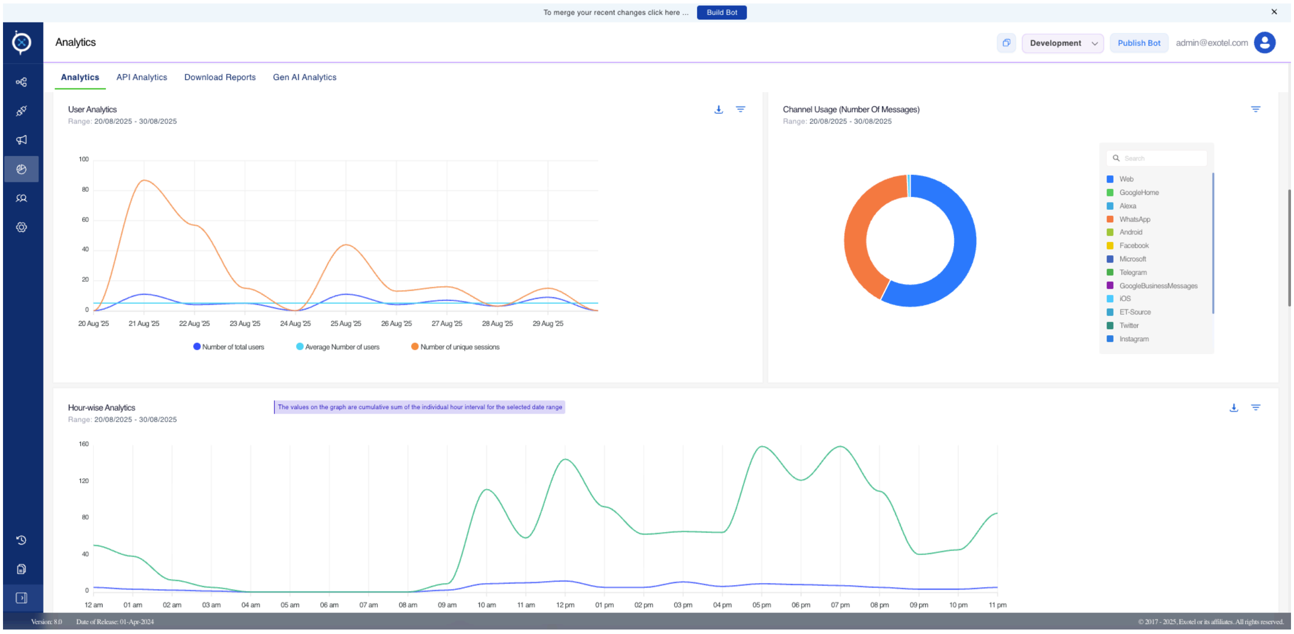
2.3 Understanding the Analytics Cards

The dashboard is composed of several key cards, each displaying specific information:

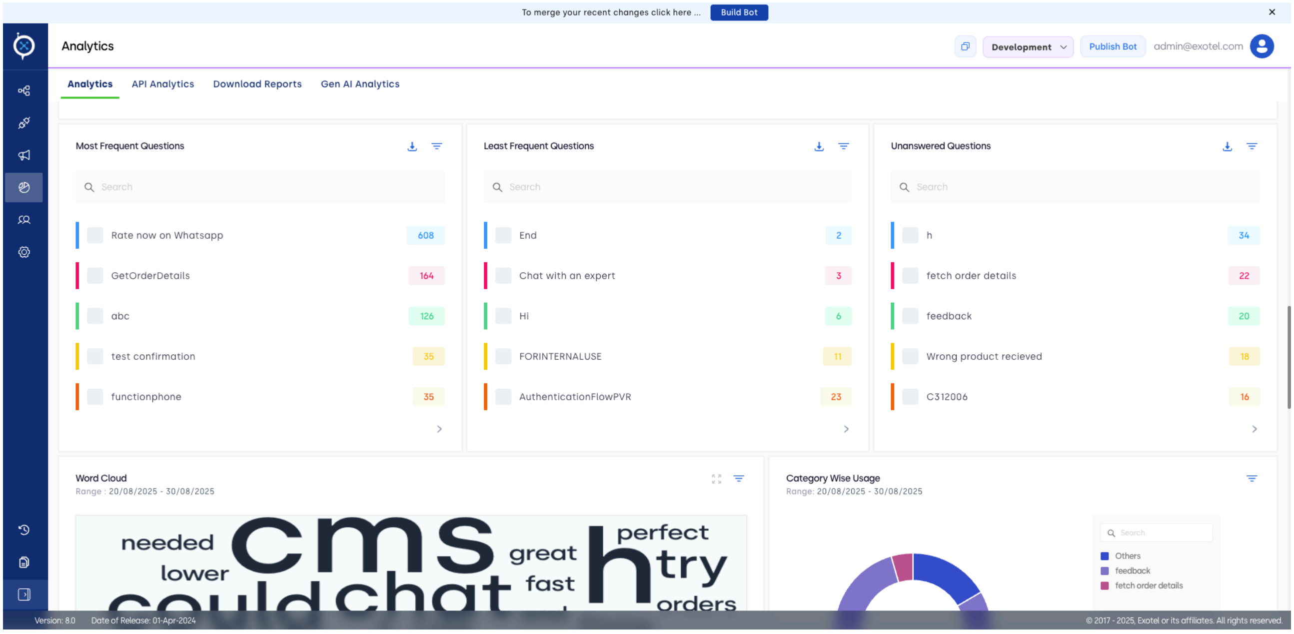
- **Top-Level KPIs**:
  - **CSAT Score**: Shows the overall customer satisfaction rating based on user feedback.
  - **Queries Answered/Asked Today**: A real-time count of bot-user interactions for the current day.
  - **Users Interacted Today**: The number of unique users who have engaged with the bot today.
- **Message Analytics Graph**: A visual representation of total messages over time, broken down into answered, unanswered, and projected messages. This helps you spot trends in conversation volume.
- **Session Analytics**: Provides metrics like Average number of messages per session, Average session duration, and the Percentage of likes (positive intent-level feedback).



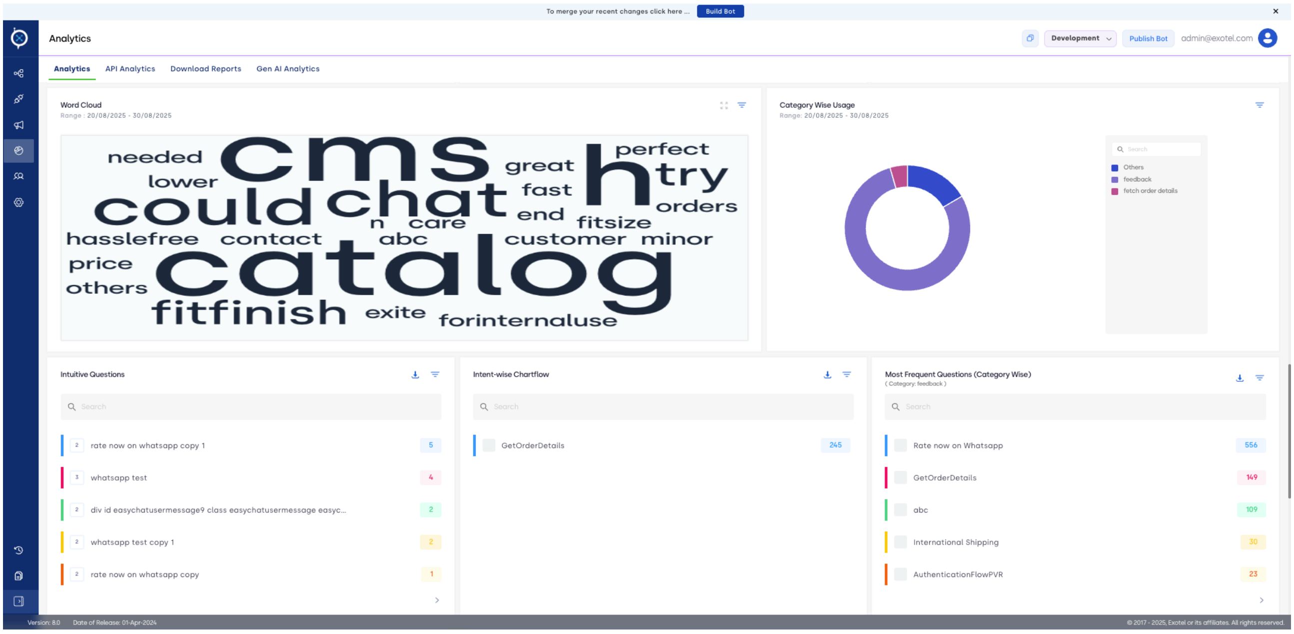
- **Hour-wise Analytics**: A graph showing the busiest times of day for bot interactions, helping you identify peak usage hours.



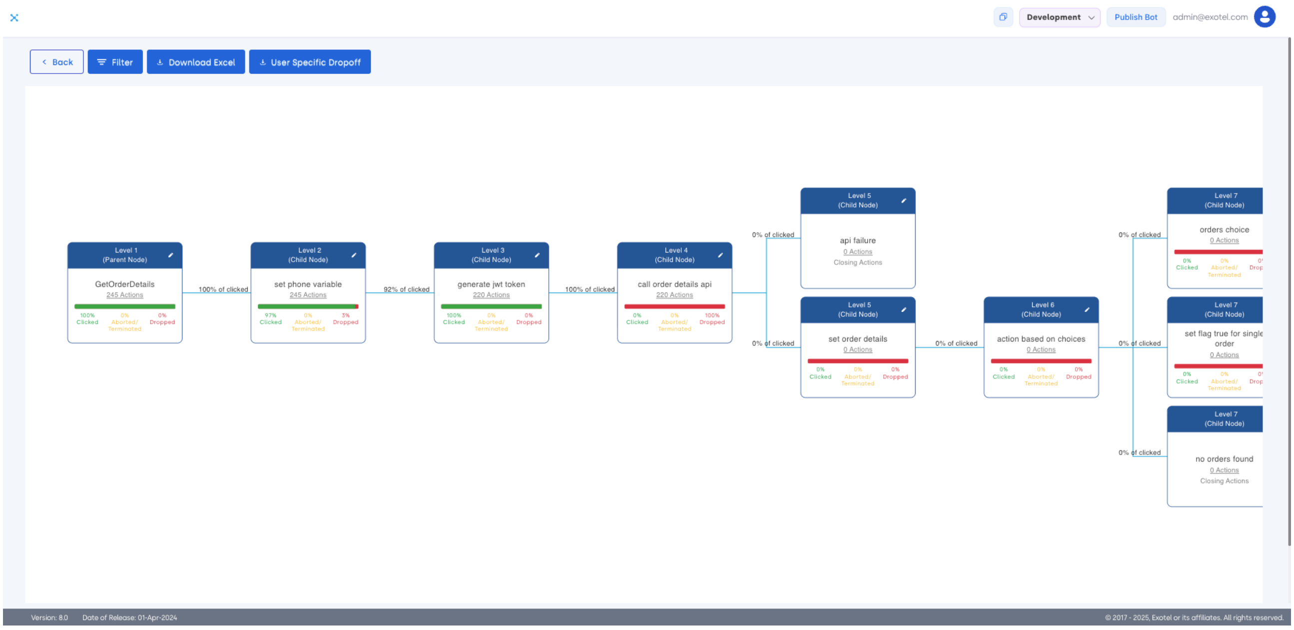
- **Device-specific Analytics**: A breakdown of users and queries based on whether they are using a mobile or desktop device.
- **Most/Least Frequent Questions**: Lists the top intents being triggered, helping you understand what your users are most interested in.
- **Unanswered Questions**: A critical list of queries the bot could not understand, highlighting immediate opportunities for content creation.



- **Word Cloud:** This widget offers an immediate visual representation of the most frequently used words and phrases in user queries. The larger the word, the more often it has been used.
- **Category Wise Usage:** This donut chart provides a high-level breakdown of bot conversations by their assigned business function or category.
- **Intuitive Questions:** This widget lists user queries that were not a perfect match for an existing intent but were successfully understood by the bot's AI. It highlights where the bot is effectively "connecting the dots" and identifies opportunities to add new training phrases for more direct recognition.
- **Intent-wise Chartflow:** This widget quantifies how often each specific conversational flow or "intent" is being triggered. It helps you identify the most popular and valuable automated processes your bot is handling.
- **Most Frequent Questions (Category Wise):** This list ranks the most popular intents or questions asked by users. It provides a clear, data-driven view of what your users are most interested in, helping you prioritize improvements and new feature development.



- **Intent-wise chat flow**: A visual diagram showing how users navigate from one intent to another, helping you analyze user journeys.



Common Use Cases

- **Identifying Peak Hours for Support**: A support manager reviews the **Hour-wise Analytics** card and discovers that bot traffic peaks between 2 PM and 4 PM. They use this data to ensure live agents are available during these hours to handle escalations.
- **Improving Bot Knowledge**: An administrator regularly reviews the **Unanswered Questions** card. They notice many users are asking about "return policy," an intent that doesn't exist. They create a new flow to address this, directly improving the bot's helpfulness.

- **Optimizing User Journeys**: A product manager analyzes the **Intent-wise chat flow** for the "Account Opening" process and sees a significant drop-off at the "Upload Documents" step. They investigate and simplify that step in the Flow Builder to improve the completion rate.
- **Measuring Channel Performance**: After launching on WhatsApp, a marketing team uses the **Channel Usage** filter to compare the volume of conversations and user satisfaction on WhatsApp versus the Web channel.

1.2.3.2. Conversion Analytics

Overview

The **Conversion Analytics** module provides a deep dive into goal-oriented user journeys and specific, high-value interactions within your chatbot. While the main Analytics dashboard offers a broad overview of the bot's health, Conversion Analytics focuses on measuring the success and failure of key business processes that you have automated. It helps you answer critical questions like, "How many users who started the loan application process actually completed it?" or "Where exactly in the sales funnel are users dropping off?"

This module is designed to track and report on multi-step flows, helping you understand user behavior, identify friction points, and optimize your conversations for better outcomes. It provides granular data on flow completion rates, user drop-offs, the effectiveness of live chat transfers, and the performance of promotional elements like welcome banners.

Key components of Conversion Analytics include:

- **Flow Completion Rate**: Tracks the number of users who start and successfully finish a specific multi-step conversation.
- **Customer Drop-Off Analytics**: Pinpoints the exact step or intent where users are most likely to abandon a flow.
- **LiveChat Analytics**: Measures the performance of your human agent handoff process.
- **Intent Analytics**: Shows the frequency and usage of individual intents.
- **Welcome Banner Analytics**: Tracks the click-through rates and effectiveness of promotional banners.

How to Use the Feature

This guide explains how to access and interpret the data within the Conversion Analytics dashboard to optimize your key chatbot funnels.

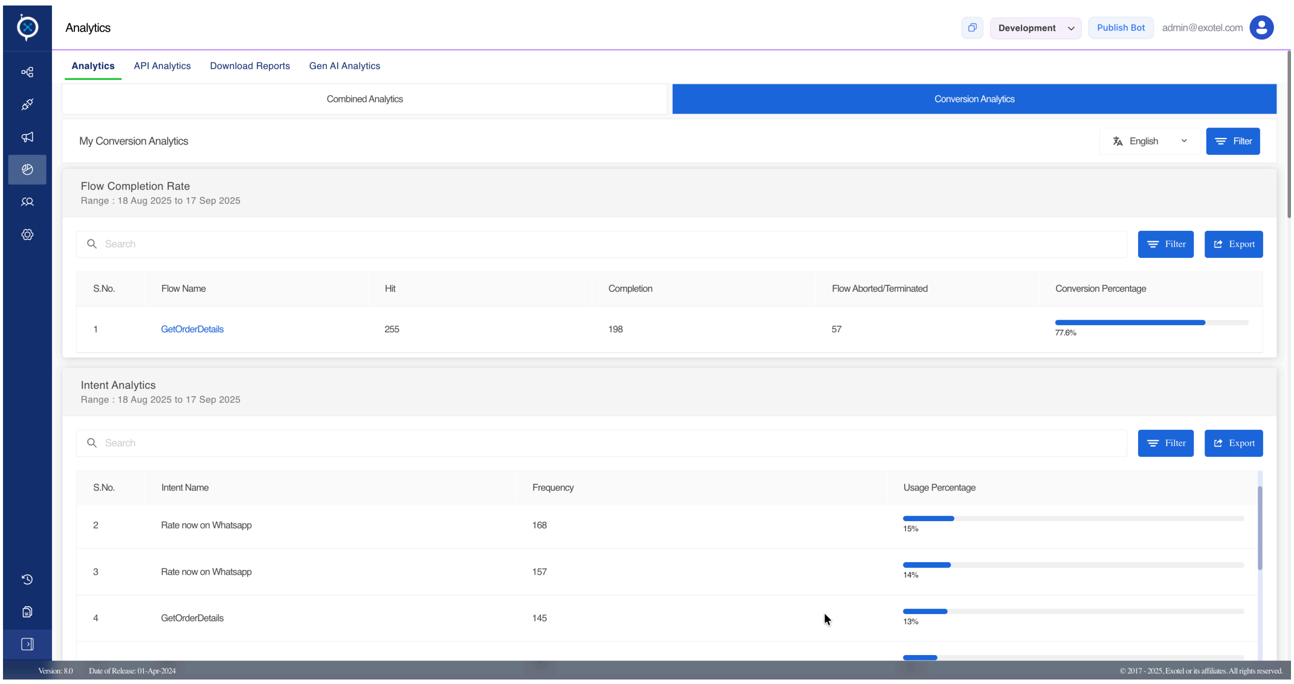
1 Navigating to Conversion Analytics

1. From the main console menu, click on **Analyse and Improve**.
2. Select **Conversion Analytics** from the sub-menu.

3. Use the **filters** at the top of the page to narrow down the data by **Date Range** and **Channel**. The data can also be exported.

2 Analyzing the Reports

- **Flow Completion Rate**: This table is the most critical for measuring the success of multi-step processes. It displays each flow's name, the number of times it was **Started**, the number of times it was successfully **Ended**, and the resulting **completion percentage**. A low percentage here indicates a problem with the flow's design or logic.
- **Customer Drop-Off Analytics**: This report helps you understand why the completion rate might be low. It shows the **Child Intent** (the specific step) and the **Main Intent** (the overall flow) where users most frequently abandon the conversation. It includes the frequency of drop-offs and the drop-off percentage, allowing you to quickly identify problematic steps.
- **Live Chat Analytics**: If your bot transfers users to human agents, this table tracks the entire funnel. It shows how many times the "Chat with an expert" flow was initiated, how many times a formal **Request was Raised**, and the final **Agent Connect Count**.
- **Welcome Banner Click Rate**: This report measures the performance of your welcome banners. You can see a preview of each banner image, its redirection URL or triggered intent, and the number of **User Clicks** and **click-through percentage** it received.



Common Use Cases

- **Optimizing a Sales Funnel**: You notice in the **Flow Completion Rate** report that your "Product Purchase" flow has only a 20% completion rate. You then check **Customer Drop-Off Analytics** and discover that 70% of users are abandoning the flow at the "Enter Shipping Details" step. This insight allows you to investigate and simplify that specific part of the conversation.
- **Improving Agent Handoff**: The **Live Chat Analytics** report shows that while "Chat with an expert" is triggered 100 times a day, only 30 requests are raised. This suggests that the pre-transfer form or questions are too complex, and you can streamline them to increase successful handoffs.
- **A/B Testing Welcome Banners**: You create two different welcome banners for a new promotion. By monitoring the **Welcome Banner Click Rate**, you can determine which image and call-to-action is more effective at driving user engagement.

1.2.3.3. Download Reports

Feature Overview

The **Download Reports** feature is a utility within the Analytics module that allows administrators to export data collected from users through forms in the chatbot. When a user fills out a Form Prompt or any other data-capturing widget within a conversation flow, their submissions are stored. This feature provides a centralized place to download this collected data in a structured format, typically as a CSV or Excel file.

This functionality is essential for any process that involves collecting user information for offline processing, such as lead generation, support ticket creation, event registration, or feedback collection. It bridges the gap between the conversational front-end and back-office workflows by enabling teams to easily access and utilize the data their chatbot gathers.

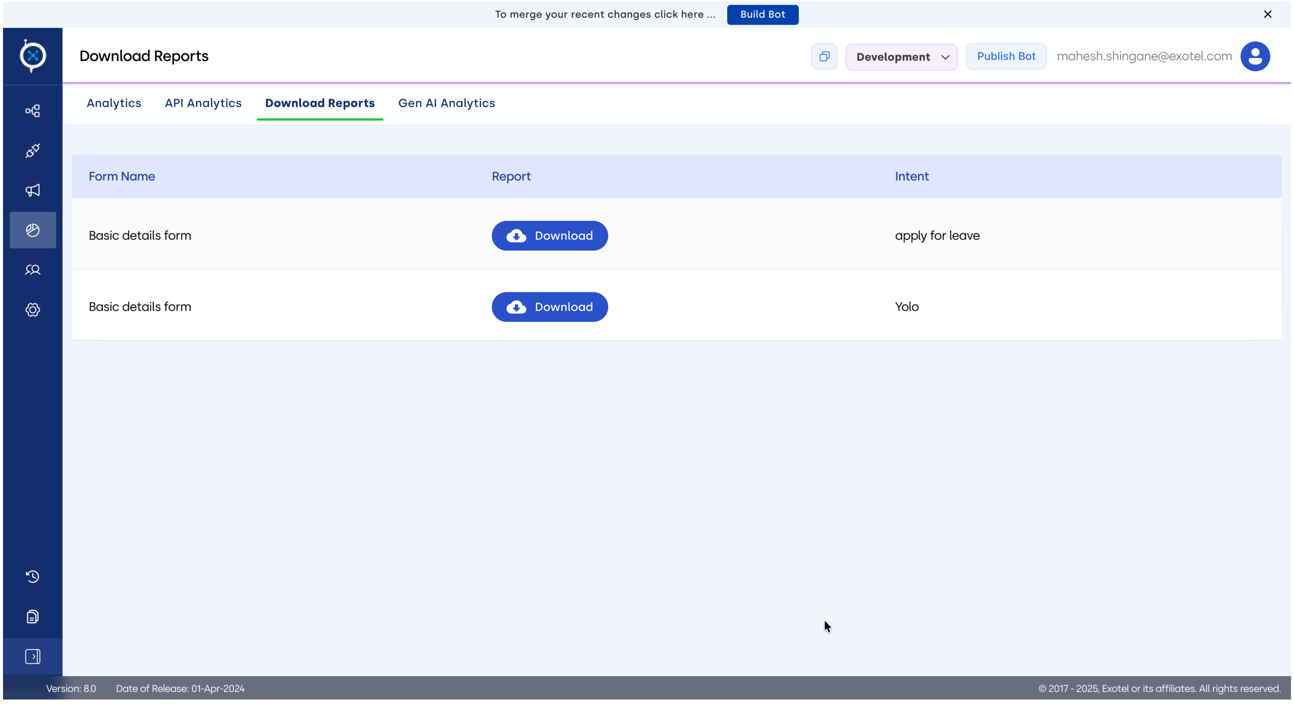
Key capabilities include:

- **Form-Based Export**: Select the specific form for which you want to download submission data.
- **Structured Data Output**: The exported file organizes the data with columns corresponding to the fields in your form.
- **Centralized Access**: Provides a single location to retrieve all user-submitted form data without needing to comb through individual chat histories.

How to Use the Feature

Downloading a Report

1. Upon entering the Download Reports section, you will likely see a dropdown menu or a list of all the forms you have created in your bot's flows.
2. Select the form for which you want to retrieve the data (e.g., "Contact_Us_Form").
3. You may have options to filter the data by a specific **date range**.
4. Click the **Download** or **Export** button.
5. The system will generate and download an Excel or CSV file containing all the user submissions for the selected form and time period. The columns in the file will correspond to the fields you created in that form.



Common Examples and Use Cases

- **Lead Generation**: A "Request a Demo" form in your bot collects a user's name, email, and company. At the end of each day, the sales team navigates to Download Reports, selects the "Demo_Request_Form," and exports the list of new leads to follow up on.
- **Customer Feedback Collection**: A bot flow includes a survey form asking users to rate a service and provide comments. The product team downloads this report weekly to analyze user feedback and identify areas for improvement.
- **Event Registration**: A chatbot flow allows users to register for a webinar by submitting their details through a form. The event organizer can download the complete list of attendees right before the event to manage logistics.
- **Support Ticket Triage**: Users who can't find an answer can fill out a "Create a Support Ticket" form. The support team downloads the report of new tickets every hour to manually create and assign them in their external helpdesk system.

1.2.3.4. GenAI Analytics

Intent Insights

Overview

Intent Insights is a GenAI-powered analytics feature that uses GenAI to help you understand **what users are asking your chatbot**, **how often those queries occur**, and **how effectively your bot is handling them**.

It enables you to:

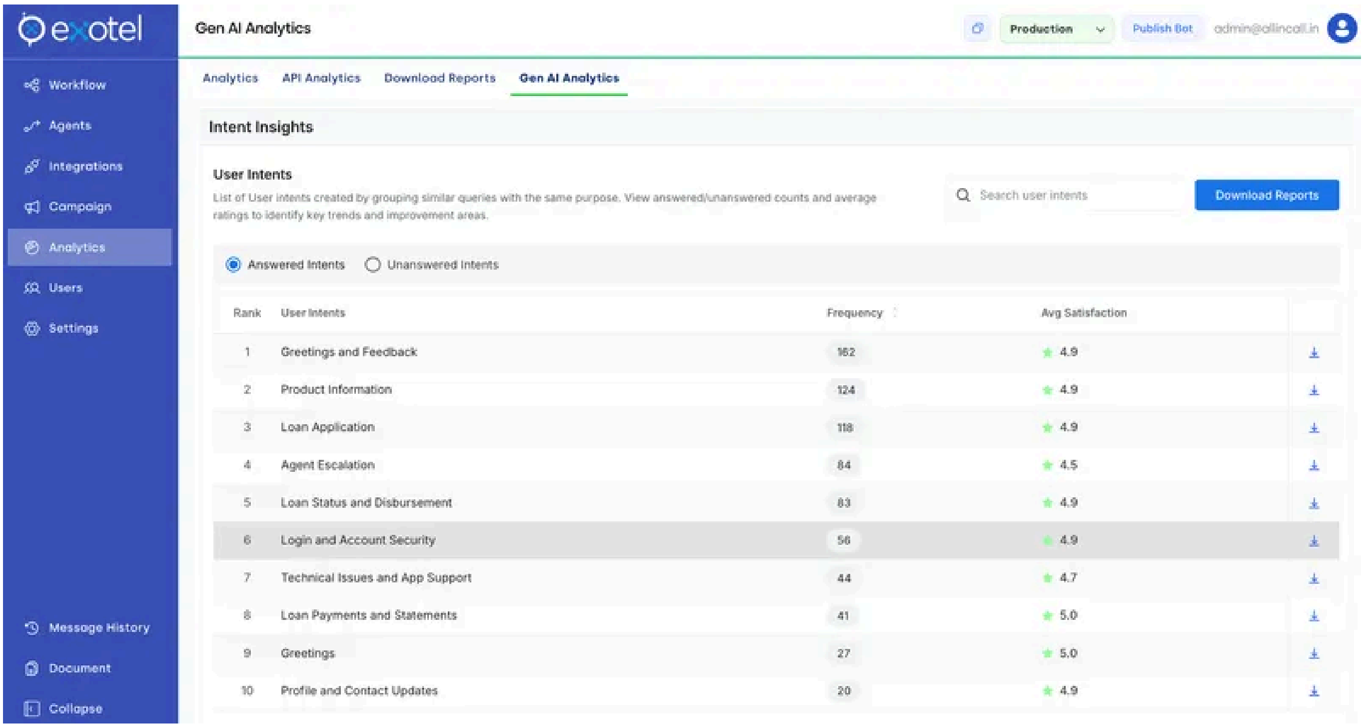
- Identify the top user intents.
- Track answered vs unanswered intents
- Understand query frequency trends
- Measure the quality of bot responses over time

```
Intent Insights is available as an Early Access (Beta) feature and will
continue to improve as we refine the analytics models.
```

Where to Find Intent Insights

In the Console UI: **Bot** → **Analytics** → **GenAI Analytics** → **Intent Insights**

If the **GenAI Analytics** section does not exist for your version or bot, it will be created automatically when the feature is enabled.



What You'll See in Intent Insights

Top Intent Insights

This section provides an **intent-level view of user queries** handled by your bot.

For each query, you can see:

- **User Intent** - Grouped representation of similar user queries.
- **Frequency** - Number of times the intent occurred.
- **Answered / Unanswered -** The user's query mapped to the Answered or Unanswered section based on how the bot handled it.
- **Average Satisfaction Score (1 to 5)**

You can:

- Sort intents by frequency
- Identify high-impact unanswered intents
- Track performance trends over time
- Search for specific intent or questions

Reports

Intent Insights supports two downloadable reports:

Overall Summary Report

- Contains all query intents (answered and unanswered)
- Includes frequency and average satisfaction score
- Reflects exactly what is shown in the table for the selected date range

Rank	Query Topics	Frequency	Avg. Satisfaction
1	Greetings and Feedback	242	4.9
2	Product Information	192	4.9
3	Agent Escalation	117	4.6
4	Loan Application	111	4.9
5	Loan Status and Disbursement	102	4.9

Intent-Level Report

- Available for individual intents that are created in the Analytics.
- The Report includes:
    - Actual user queries
    - Bot responses
    - Timestamps
    - Ratings
- Useful for deep analysis and training improvements
- Sample Report:

Date	Session ID	User ID	Query Timestam	User Query	Bot Response	Rating
15/01/26	1e5e6b5b2928d	930a979f-742e8	##########	What is my loan status	We are sorry, but we were unable to find any loan application associated with your profile. Please contact our customer support team for further assistance.	4
15/01/26	5a7f78de3494a	fbc43244bef68c	##########	Just like to ask - Is my loan process denied?	We are sorry, but we were unable to find any loan application associated with your profile. Please contact our customer support team for further assistance.	2
15/01/26	bbc363edf3d7a	025886-11767b	##########	My loan status?	We are sorry, but we were unable to find any loan application associated with your profile. Please contact our customer support team for further assistance.	3

Note: The reports need to be downloaded separately for Answered & Unanswered Intents, and the data depends on the Data range filter.

Key Definitions

Answered Query

- A query is marked as *Answered* when the chatbot understands the user's intent and handles it independently using its configured flows, knowledge, or reasoning without transferring the conversation to a live agent.

Unanswered Query

- A query is marked as *Unanswered* when the chatbot cannot handle the user's intent on its own.
- This may happen due to missing training, incorrect or fallback responses, or when the conversation is transferred to a live agent.
- An unanswered query does not always mean a poor experience, it indicates human or system dependency.

Frequency

- Frequency shows how many times a particular query topic was raised by users during the selected time period.
- Similar queries are grouped together to provide a clear view of common user needs.

Average Satisfaction Score

- The Average Satisfaction Score represents how well the chatbot handled a query intent, rated from 1 to 5 across sessions.
- This score reflects response quality and relevance, regardless of whether the user's query was answered or unanswered.

How Intent Insights Works (In Simple Terms)

- Intent Insights runs **after a chat session ends** (no real-time processing).

- Conversations are analyzed using GenAI to:
  - Group similar queries into Intents
  - Classify them as Answered or Unanswered
  - Assign a quality rating (1 to 5)

This process does **not impact live bot performance**.

Supported Bot Types

Intent Insights works across all available chatbot configurations, depending on the enablement of the feature in the bot's setup.

Feature Availability & Enablement

- Intent Insights is available as **Early Access (Beta)** for selected customers.
- It can be enabled at the **bot level and not enabled by default.**
- Data starts populating **from the date of enablement onwards**.
- To enable this feature, please contact your **Account Manager** or **Product Team**.

```
Note: Enabling Intent Insights may incur additional costs based on your setup.
```

Known Limitations (Beta)

- Insight's accuracy will improve over time as models and prompts are refined.
- Analytics are post-session (not real-time).
- The feature does not auto-train the bot, manual improvements are required.

Best Practices

- Review high frequency unanswered intents weekly by downloading the individual **Intent-Level Report** for the low rating Intents.

- Understand the type and way the queries are asked by the users and train them on the bot.
- See the cases where the bot does not have an answer for the frequently asked queries, and add them to the flows or FAQs.
- Check for any anomaly in the patterns in a sudden bump in the spike, negative rating for a previously working flow, and fix them -
  - This may be due to unhandled edgecases on the bot flows.
  - API issues - Delays, Timeouts, etc.
  - Any changes done in the existing flows.
- Track satisfaction score trends to measure improvement on the bot.

Frequently Asked Questions

Does this affect live bot performance?

No. All analysis happens after the session ends.

Can short answers still receive high scores?

Yes. Ratings are based on correctness and relevance, not response length.

Does this replace existing analytics?

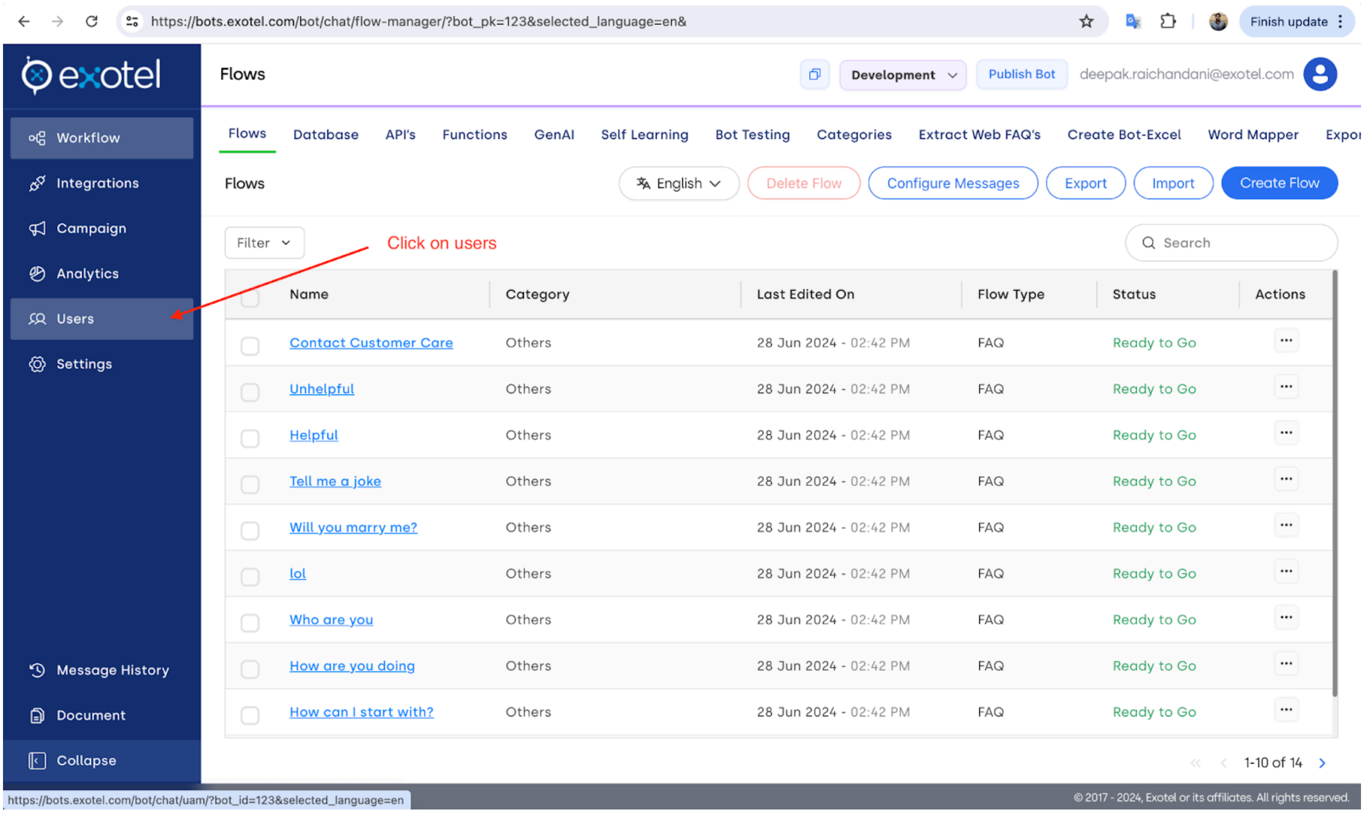
No. Intent Insights complements your existing analytics.

1.2.4. Users

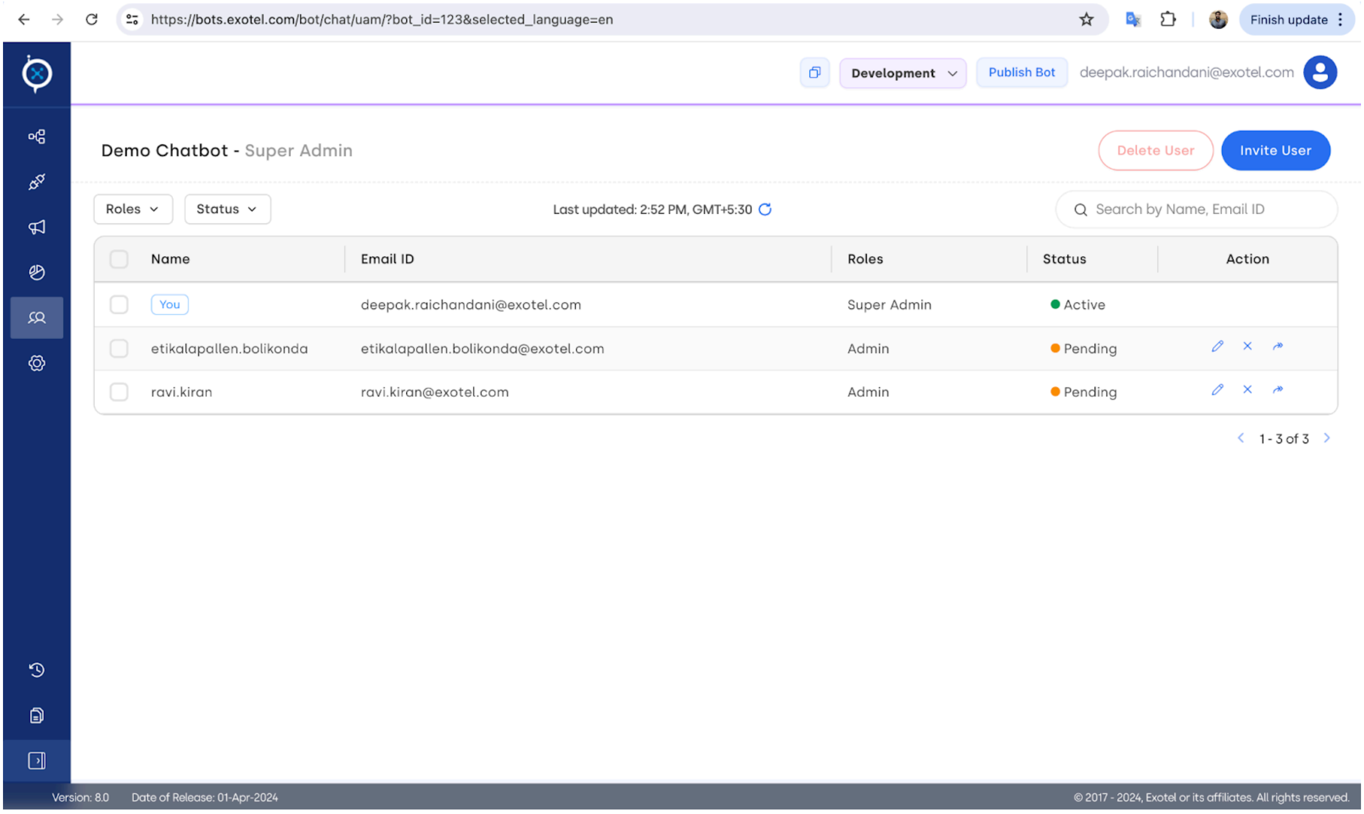
Invite Your Team:

Important: Select the correct **Access Role**. For clients and external collaborators, always choose the **Admin** role. The Super Admin role should be reserved for internal staff who need publishing rights.

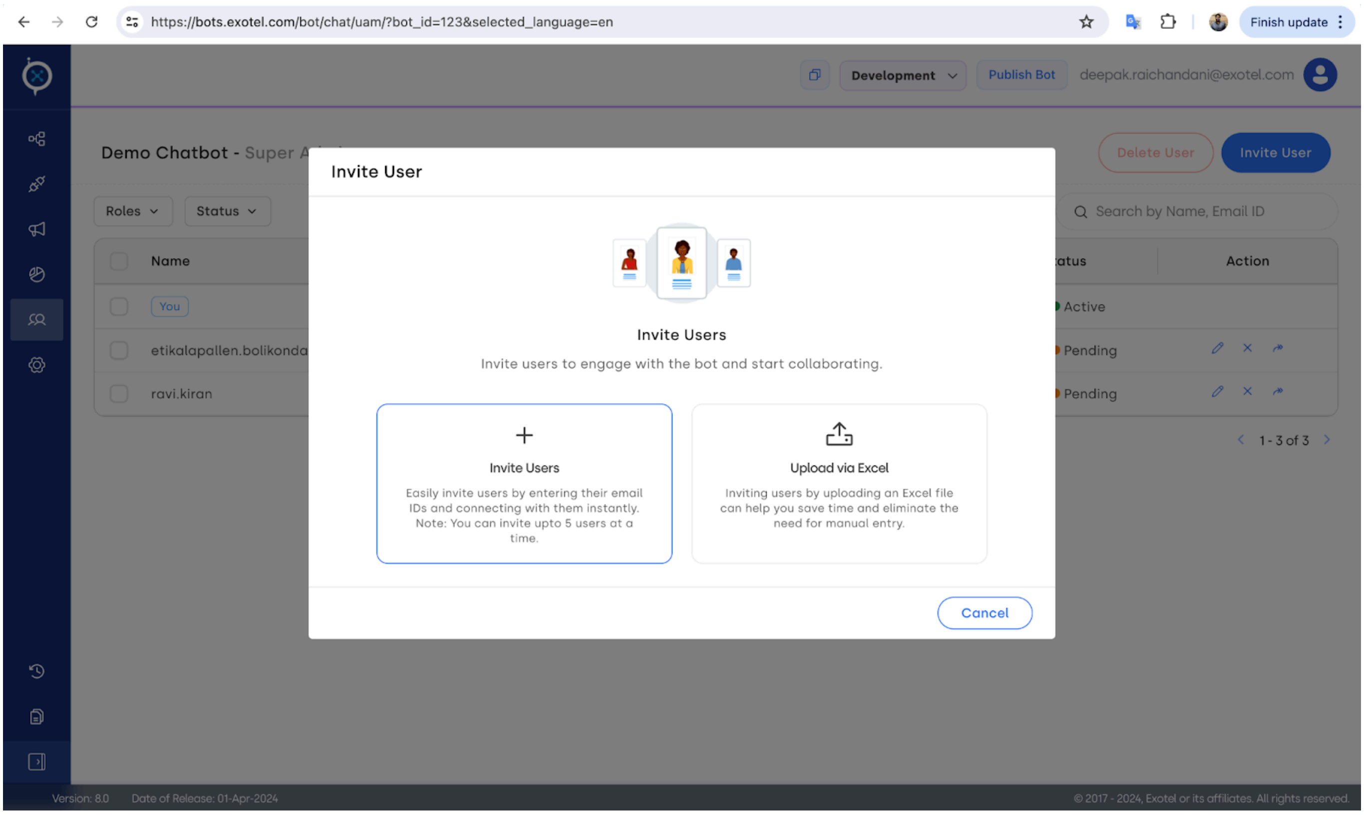
Open the bot you just created and navigate to the **Users** section from the side menu.



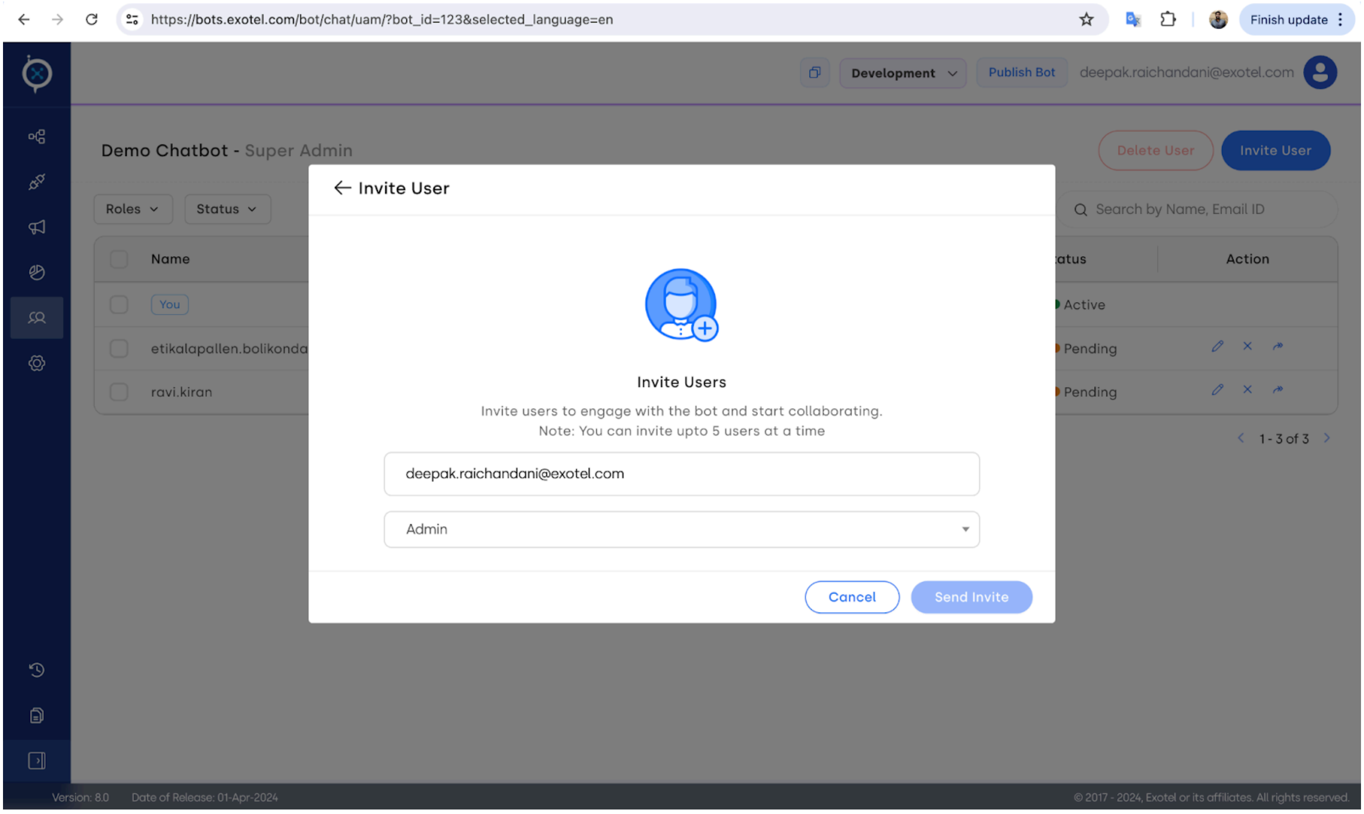
Click the **Invite Users** button.



Select the **Invite Users** option.



Enter the email address of the person you want to add.



Important: Select the correct **Access Role**. For clients and external collaborators, always choose the **Admin** role. The Super Admin role should be reserved for internal staff who need publishing rights.

What Happens Next:

The user you invited will receive an email. They will need to accept the invitation and set up their password to access the bot.

Once they log in, they will have the permissions associated with the role you assigned them.

Understanding User Roles

Super Admin: This role has full control over the bot, including the critical ability to **publish** changes to the live environment. This role is typically for internal Exotel employees or project leads.

Admin: This role can do almost everything a Super Admin can, including building and editing conversational flows. However, an Admin **cannot** publish the bot. Any changes they make must be reviewed and published by a Super Admin.

Best Practices for a Smooth Start

Verify Emails Before Inviting: Double-check that you have the correct email address before sending an invitation to avoid security risks.

Assign Roles Carefully: Always grant the minimum necessary permissions. For most collaborators, the "Admin" role is sufficient and safer.

Communicate with Your Team: After sending an invite, let the person know to expect an email so they can get set up quickly.

1.2.5. Settings

Overview

The **Settings** module is the central control panel for configuring your chatbot's global behavior, operational parameters, and core functionalities. While the Workflow module defines what the bot says, the Settings module defines how the bot operates as a whole. It allows you to customize everything from the bot's name and feedback mechanisms to enabling major solutions like LiveChat and Exomind.

This section is divided into four main areas, each managing a different aspect of the bot's configuration:

- **Bot Settings**: This is where you manage the bot's identity, language settings, and core NLP behavior, such as masking confidential information and setting the confidence threshold for recognizing intents.
- **Email Settings**: Configure automated email notifications to keep stakeholders informed about the bot's performance, API failures, or other critical events.
- **Solution Settings**: This area acts as a switchboard to enable or disable major, high-level features like the Exomind knowledge base search, LiveChat integration, and the Ticket Management System.
- **Other Settings**: A collection of miscellaneous but important configurations, including setting up Customer Satisfaction (CSAT) surveys, defining flow termination keywords, and managing profanity filters.

Properly configuring these settings is crucial for ensuring your chatbot is effective, secure, and aligned with your business goals.

How to Use Settings

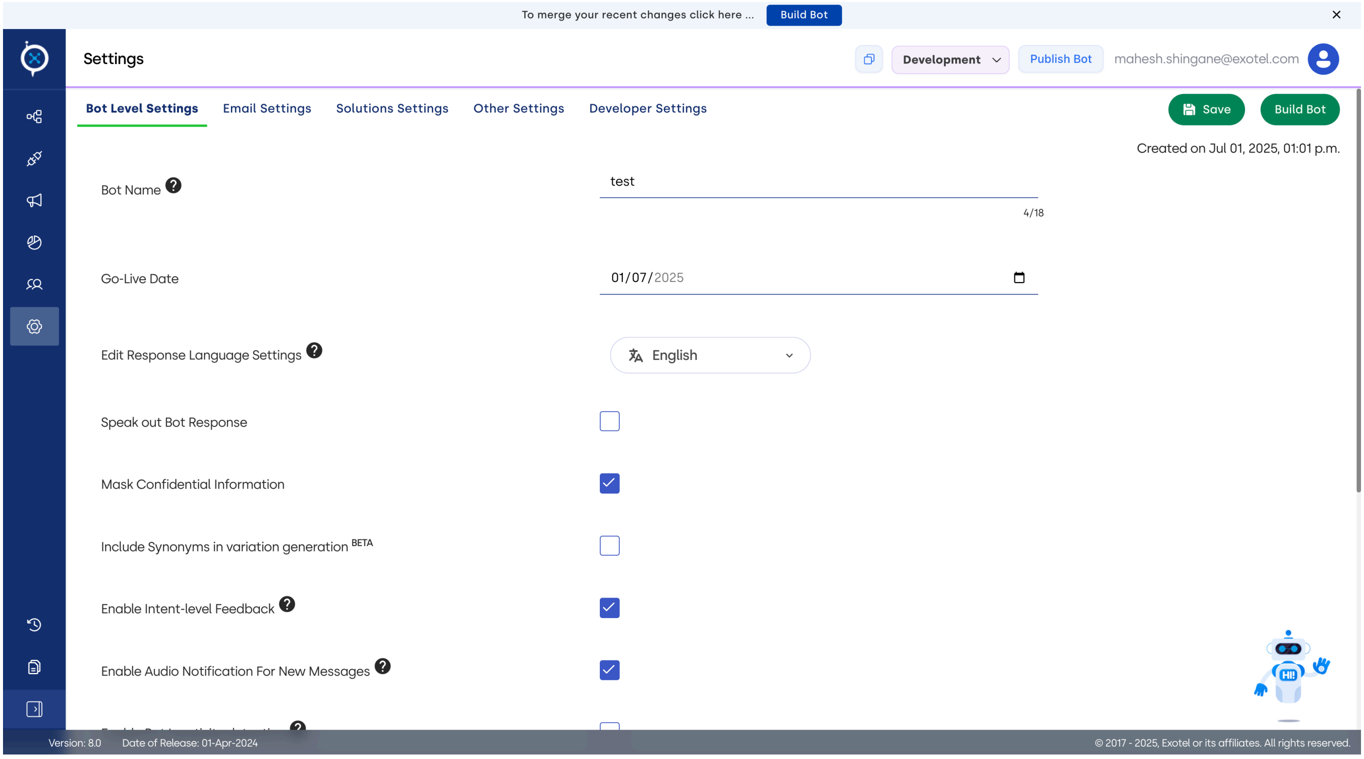
This guide provides a step-by-step walkthrough of the key configurations available in each section of the Settings module.

1 Navigating to Settings

1. Log in to the Exo-Chatbot console.
2. From the main navigation menu on the left, click on **Settings**. You will be presented with the four sub-sections.

2 Configuring Bot Settings

- **Navigation**: **Settings -> Bot Settings**
- **Configuring Basic Information**
  1. **Bot Name**: In the "Bot Name" text field, enter the desired name for your chatbot.
  2. **Go-Live Date**: Click on the date field next to "Go-Live Date" and select the appropriate date from the calendar.
- **Enabling Voice Response**
  1. Locate the **Speak out bot response** toggle switch.
  2. Click the toggle to enable or disable the text-to-speech functionality. When enabled, a mute/unmute icon will appear in the bot interface for the end-user.
- **Configuring Advanced NLP Settings**
  1. Scroll down to the **Advance NLP configurations** section.
  2. First, enable the **Bot level advanced NLP configurations** toggle. This will reveal the "Threshold" setting.
  3. **Threshold**: This is a score between 0 and 1 that represents the bot's confidence level.
     - Use the slider or input box to set the desired value (e.g., 0.75).
     - A user's query must match an intent with a confidence score higher than this threshold for the bot to trigger a direct response. If the score is lower, the bot will likely provide suggestions or a failure message.
  4. Click **Save** at the top of the page to apply all your changes.



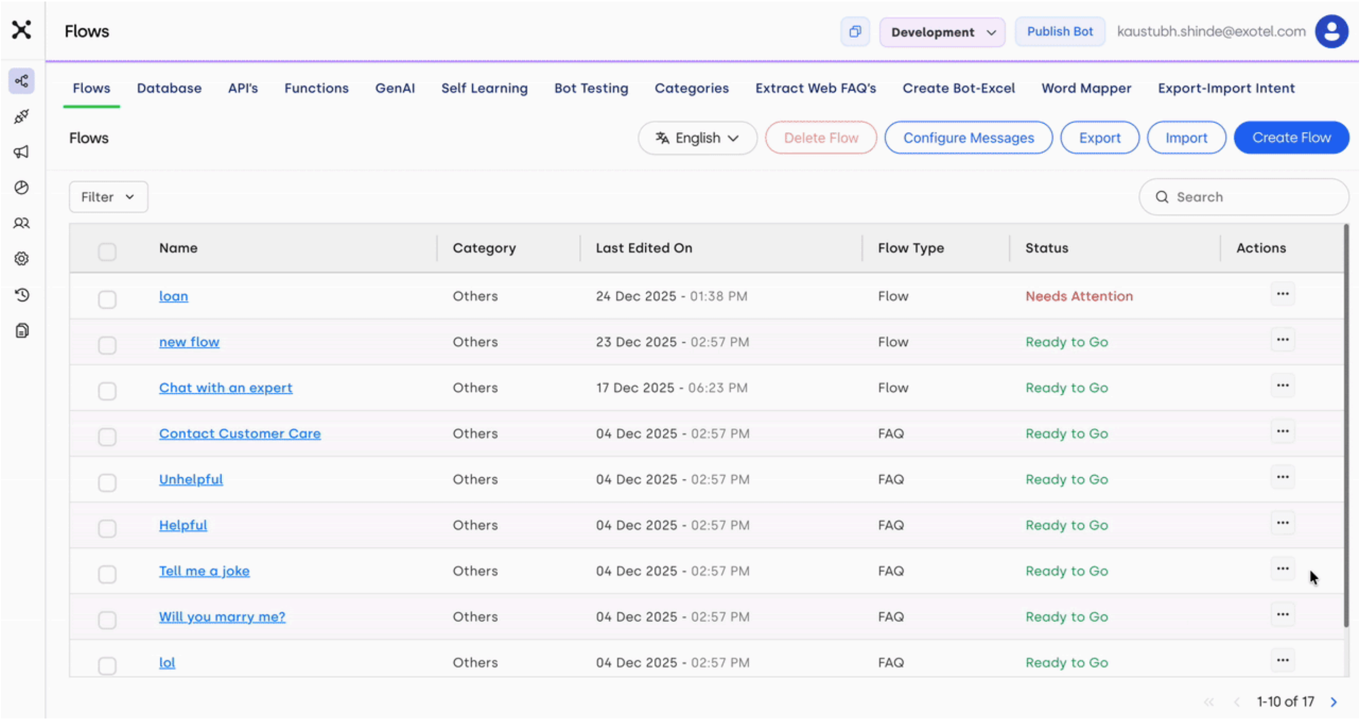
3 Configuring Solution Settings

- **Navigation**: **Settings -> Solution Settings**
- **Navigating to Solution Settings**
  1. Log in to the Exo-Chatbot console.
  2. From the main navigation menu on the left, click on **Settings**.
  3. Select the **Solution Settings** tab.
- **Enabling Core Solutions**
  On the Solution Settings page, you will see a list of toggles for the major features:
  - **Enable LiveChat Functionality**:
    - Click the toggle to turn this feature on.
    - Once enabled, additional options appear, such as:
      - **AutoSuggest LiveChat for Complex Queries**: Set a word limit. If a user's query is longer than this limit, the bot will proactively offer to connect them to an agent.
      - **Suggest/Trigger LiveChat for Profanity words**: Configure the bot to offer or initiate a live chat session if a user uses profane language.
  - **Enable PDF Searcher / Exomind**:
    - Click the toggle to activate the knowledge base feature.

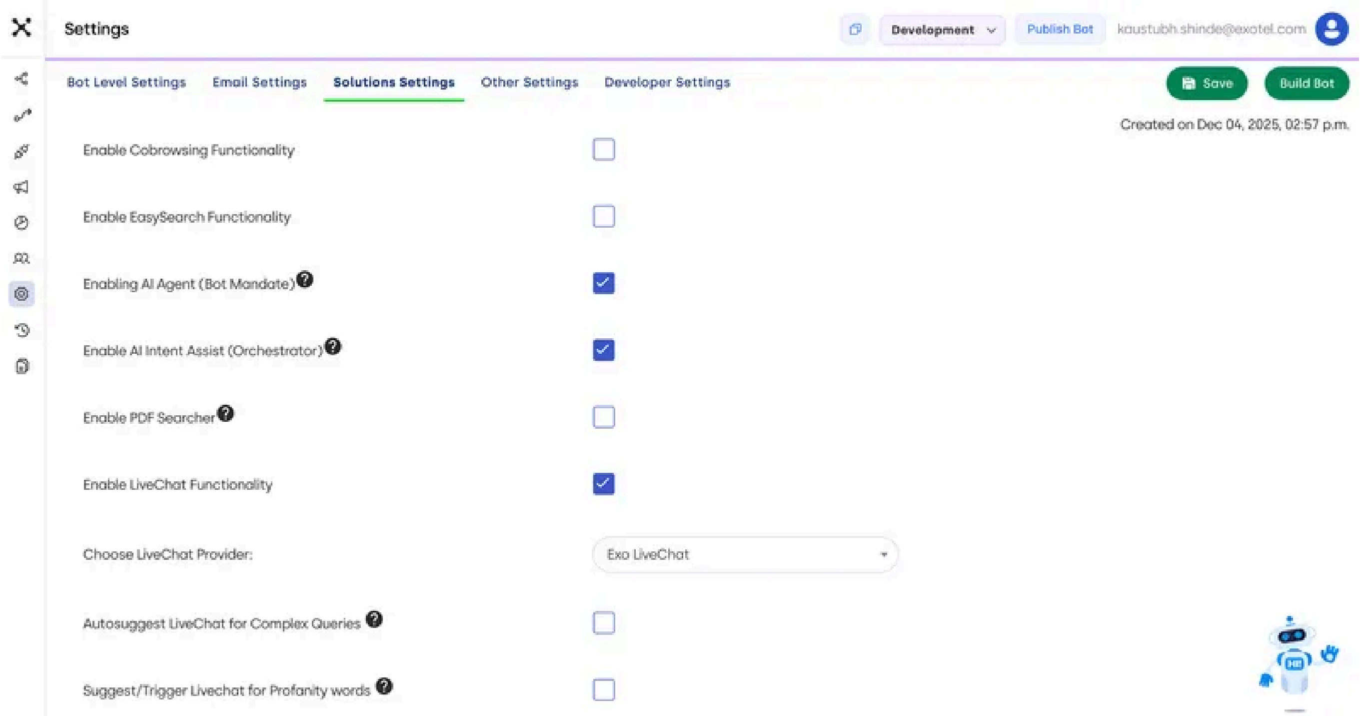
        - You must then select **ExoMind (Beta)** from the dropdown model list. (For detailed instructions on building the knowledge base, refer to the **Exo-Insights** documentation)
    - **Enable AI Agent (Bot Mandate)**
        - The **Enable AI Agent** setting allows you to activate the **AI Agent Studio** for your bot directly from the platform. Once enabled, the AI Agent Studio appears in the left navigation bar, allowing you to build GenAI-powered conversational flows using natural-language objectives and actions.
        - **When enabled:**
            - The **AI Agent Studio** becomes available for the bot and a default flow will be created.
            - User will have to update the Prompts for the Supervisor & Sub-Goal nodes.
            - User queries are handled by **AI Agent flows only**.
            - Existing NLP flows will not respond. But the existing flows are not removed.

```
Important: To allow the AI Agent and NLP flows to work together,
additional configuration (Intent Assist / Orchestrator) needs to be
enabled. This will be available soon.
```

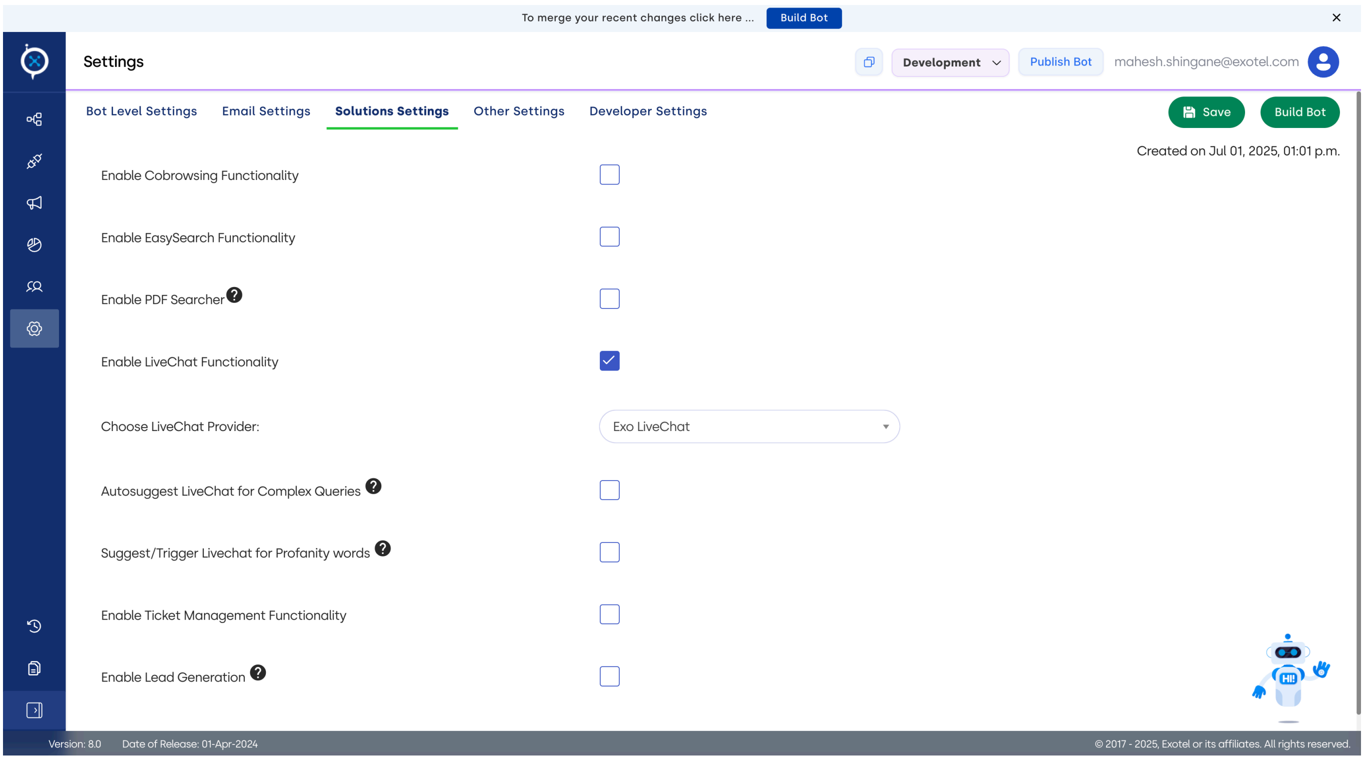
        - **When disabled:**
            - The AI Agent Studio is turned off for the bot.
            - The bot stops using AI Agent flows to respond to users.
            - The bot will use **existing NLP flows**.
            - All AI Agent flows are **preserved in their last saved state** and will be restored if re-enabled later.
        - **Important**: Detailed guidance on building and managing AI Agent flows with NLP is available here - **[How GenAI works with an NLP bot]**.



- **Beta - Enable AI Intent Assist (Orchestrator):**
  - The **AI Intent Assist** setting improves NLP intent detection and how the bot understands user queries using AI.
  - It helps identify the closest matching intent when exact NLP matches are not found.
  - When enabled, the bot first attempts standard NLP intent matching, followed by AI-assisted intent detection.
  - This reduces missed intents and improves accuracy for complex or ambiguous queries that cannot be identified using the NLP matching system.
  - **Note**: This setting can be enabled independently or used together with **AI Agent** for advanced orchestration.
  - To learn more about how this works, please read through this document: **How GenAI works with an NLP bot**.



- **Enable Ticket Management Functionality**:
  - Click the toggle to allow the bot to create support tickets. This functionality needs to be used with the appropriate actions in the Flow Builder to be effective.

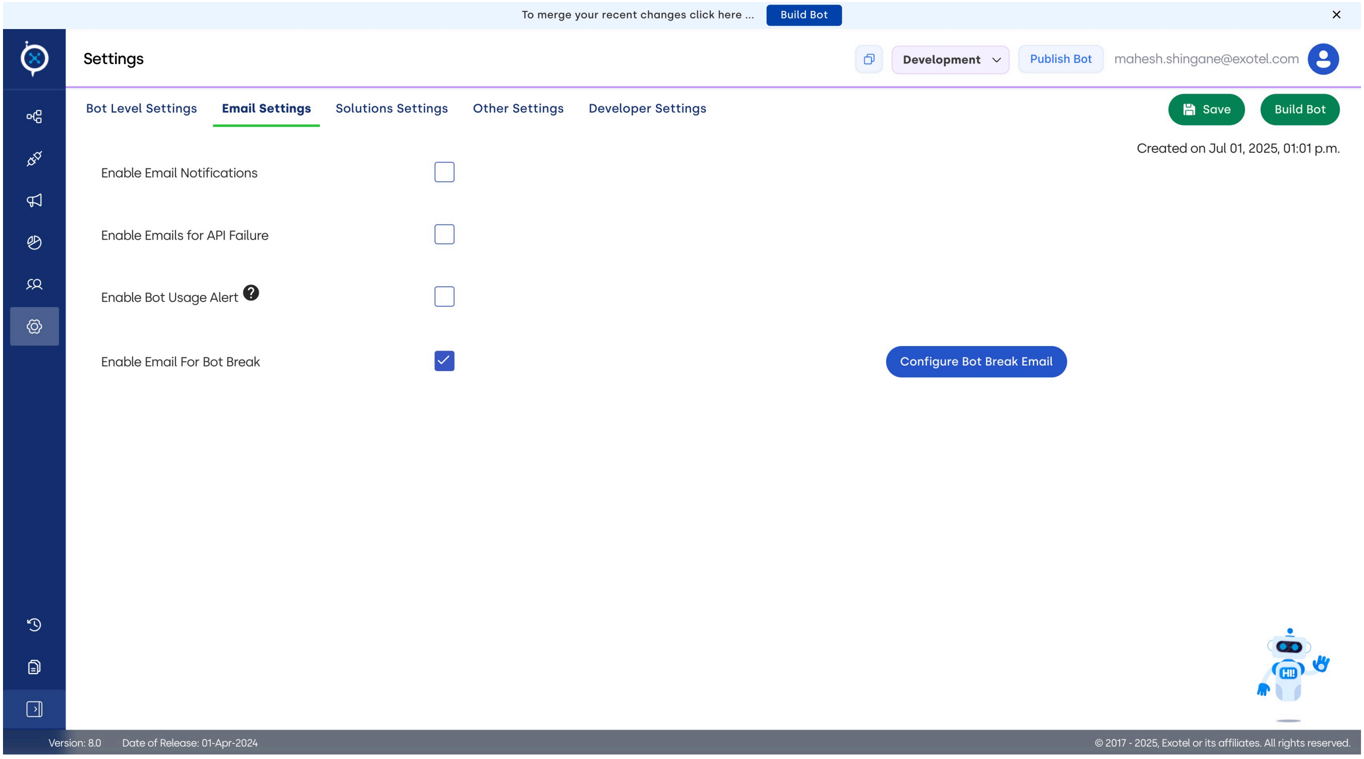


4.Configuring Email Settings

- **Configuring Scheduled Email Reports (Profiles)**
  Enable the **Enable Email Notification** toggle.
  1. Click on **Configure Notifications**. This will open the profile management interface.
  2. Click **Add Profile** to create a new report configuration or click on an existing profile to edit it.
  3. **Configure the Profile**:
     - **Trigger settings**: Give the profile a name, select the **Email Frequency** (e.g., Daily, 7 days), and enter the recipient **Email address(es)**.
     - **Table Parameters**: Select the data you want to see in the body of the email, such as Message Analytics, Session Analytics, and User Analytics.
     - **Graphic Parameters**: Enable this to include visual charts and graphs in the email for a quick overview.
     - **Attachment Parameters**: Choose the detailed reports you want to attach as files. This is ideal for large data sets like Unanswered Queries, CSAT report, or Language Based Report.
  4. **Save and Test**: After saving the profile, you can use the **Send Sample Mail** feature to send a test email and verify its content and formatting
- **Configuring Critical Alerts**

The Email Settings page also allows you to configure instant alerts for specific events.

- **For API Failures**: Enable the **Enable Email for API Failure** toggle and add the email addresses that should be notified immediately when a configured API call fails.
- **For Bot Breaks**: Enable the **Enable Email for Bot Break** toggle. This will send an alert if the bot fails to provide an expected response. You can configure the time interval and recipient email addresses.

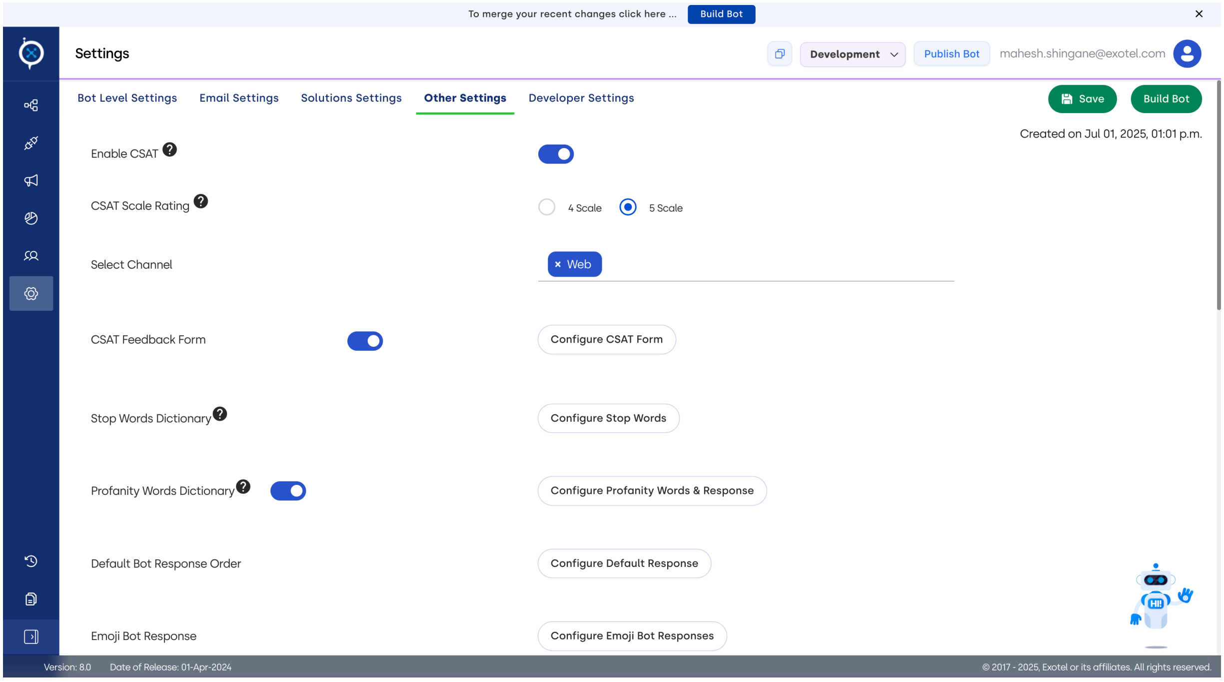


5.Configuring Other Settings

- **Navigation**: **Settings -> Other Settings**
- **Configuring Customer Satisfaction (CSAT)**
    1. Locate the **Enable CSAT** toggle and turn it on.
    2. Click the **Configure CSAT Form** button.
    3. In the configuration panel, choose your preferred **CSAT Scale Rating** (e.g., 4-star or 5-star).
    4. Customize the feedback questions and options. You can also configure the bot to ask for a reason if a user provides a low rating.
    5. For channels like WhatsApp, you can set a timer to determine when the CSAT survey is sent after an interaction.
- **Managing Flow Termination**
    1. **Flow termination keywords**: In this field, enter a comma-separated list of words that should immediately end any active flow (e.g., stop, exit, cancel, bye).
    2. **Flow termination bot response**: Customize the message the bot will display when a flow is ended by one of the keywords (e.g., "Okay, I've cancelled that for you. How else can I help?").
    3. **Enable Abort Flow**: This toggle controls the confirmation step.

- When **enabled**, if a user tries to start a new topic while in the middle of a flow, the bot will show the "Flow Termination Display Message."
- **Flow Termination Display Message**: Customize this confirmation prompt (e.g., "It looks like you're in the middle of something. Are you sure you want to cancel?").
- When **disabled**, the bot will immediately switch to the new topic without asking for confirmation.

- **Configuring the Stop Words Dictionary**
  1. Locate the **Stop Words Dictionary** section.
  2. In the input field, add common words that you want the NLP engine to disregard when trying to understand a user's intent. This typically includes articles, prepositions, and conjunctions.



1.2.6. Message History

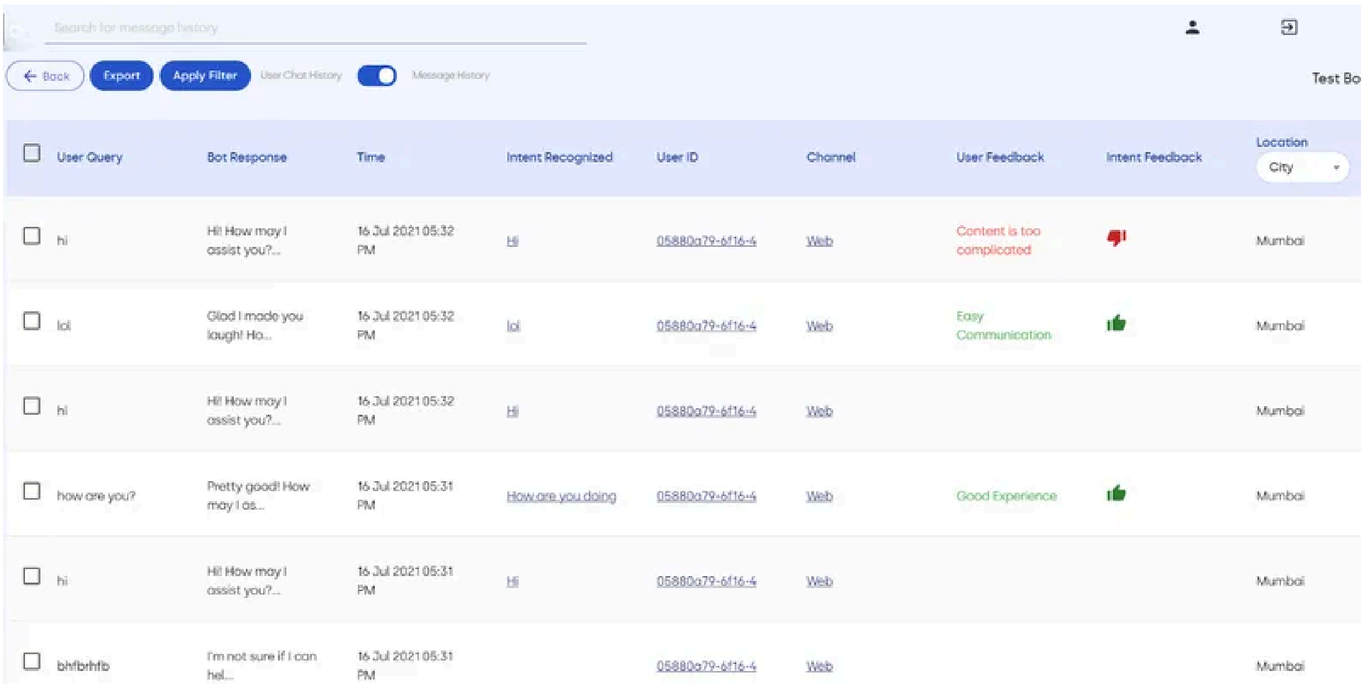
Message history / User chat history: The admin can see the comprehensive message history and sentiments of all the users interacting with the chatbot. The admin can export these logs through keyword or for a period.

An option to filter by queries, feedback, channels, sentiments, timestamp and location is provided.

The user can also toggle between message history and user history. An option to filter by channel and date in the user chat history.

Identified Intent Analytics- Analytics to determine how much our NLP was when the bot is responding to a user query.

The admin can see the comprehensive message history and sentiments of all the users interacting with the chatbot. The admin can export these logs through keyword or for a period. The user can also toggle between message history and user history.



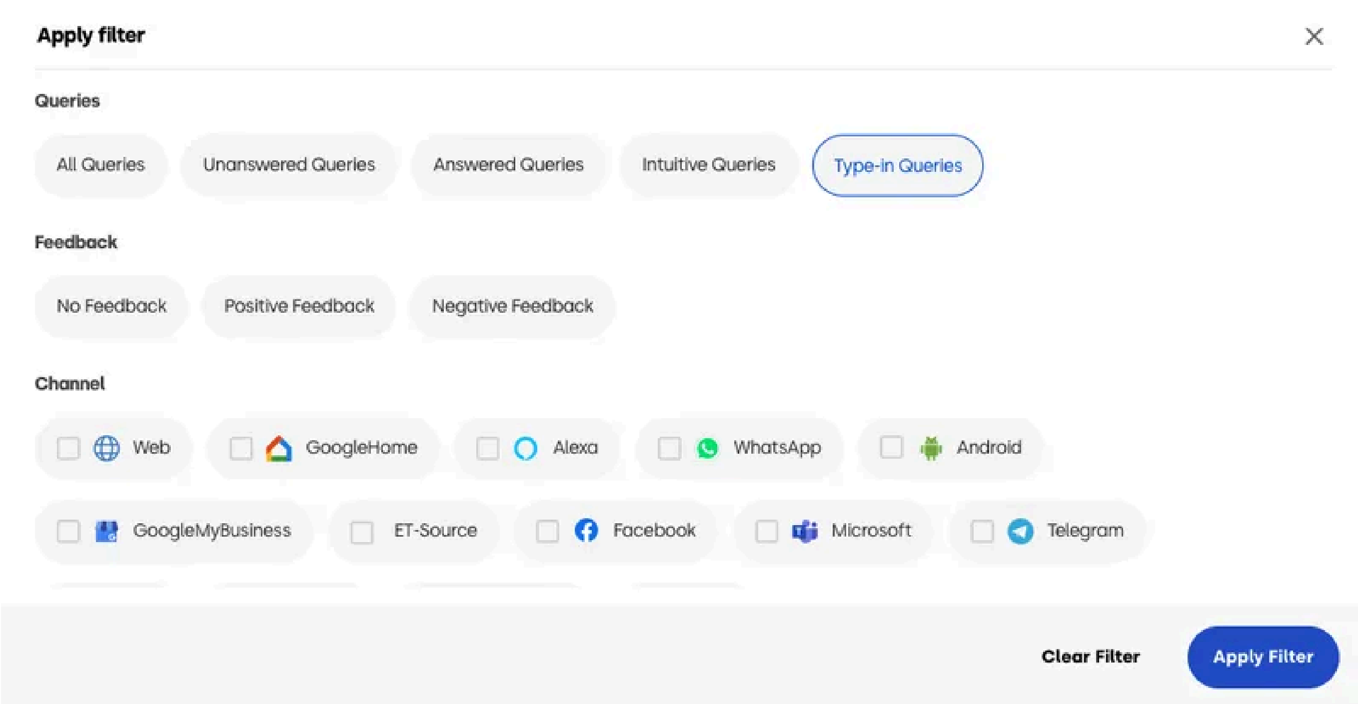
Message History Filter : This is visible under Message History > Toggle from User Chat History to Message History > Click on Apply Filter

Type-in Queries

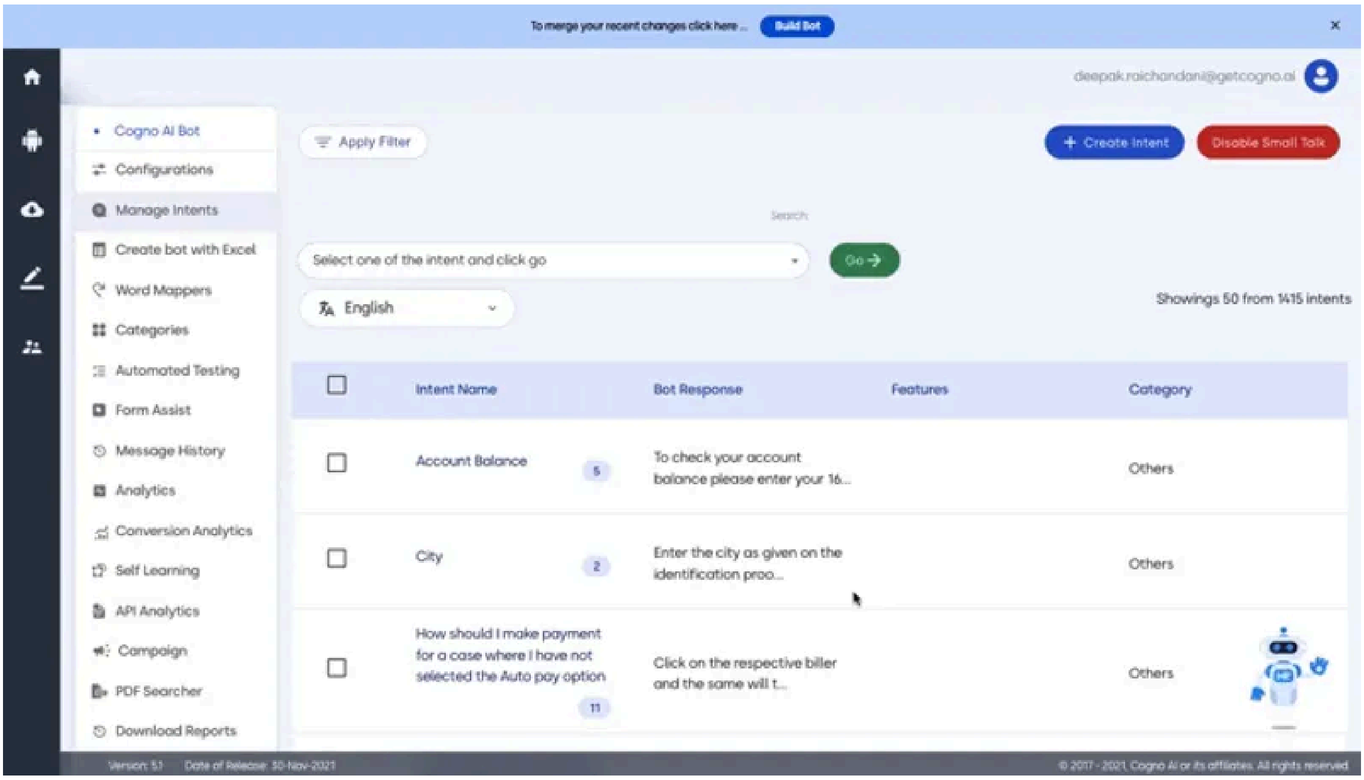
These are the queries which are typed in manually or sent without without selecting any suggestions, recommendations, menu, sticky, child intents

by the customers.

This is visible under Cogno Chatbot Console > Message History > Toggle to Message History > Apply Filter > Type in Queries



Identified Intent Analytics



Analytics to determine how much our NLP was when the bot is responding to a user query.

This is visible under Chatbot Console > Message History

New metrics have been added to the "Message History" table

1. **Variation Responsible:** This indicates when an intent is triggered against a customer query inside the chatbot, which training sentence variation of that intent was having the nearest match with the customer query which led to that intent being triggered.
2. **% Match:** This indicates the percentage match of a particular intent (variation/keyword/intent name) with a customer query when that particular intent gets triggered.
3. **Average Accuracy:** This indicates the average accuracy percentage of the bot's recommendation system and the same get's calculated as a mean of all the values getting displayed on the "%Match" field inside message history at that instant.

% match formula : [(Customer query segmented words (Other than stop words) **/** Nearest Training sentence segmented words or intent name segmented words)] * 100

User Friendly UI/UX for the message history page.

1. Columns can now be edited to keep the view of only the data the user wants to view. This can be done by clicking on the "edit" icon available on the top right side of the Message History Page.
2. No. of records per page by default would be 10 and the same can be changed to 25, 50, 70 and 100 from the "No of records per page" dropdown available just on the left side of the "Filter" button.
3. Two more filters to filter queries which are available inside the filter.
4. **A dropdown to select intent:** When an intent is selected here only those queries will get loaded where that particular intent has been triggered by the bot against a customer query.
5. **Percentage Bracket Slider:** When a user selects a particular %bracket, only the customer queries where recognized intent % fall under the provided bracket would be displayed.

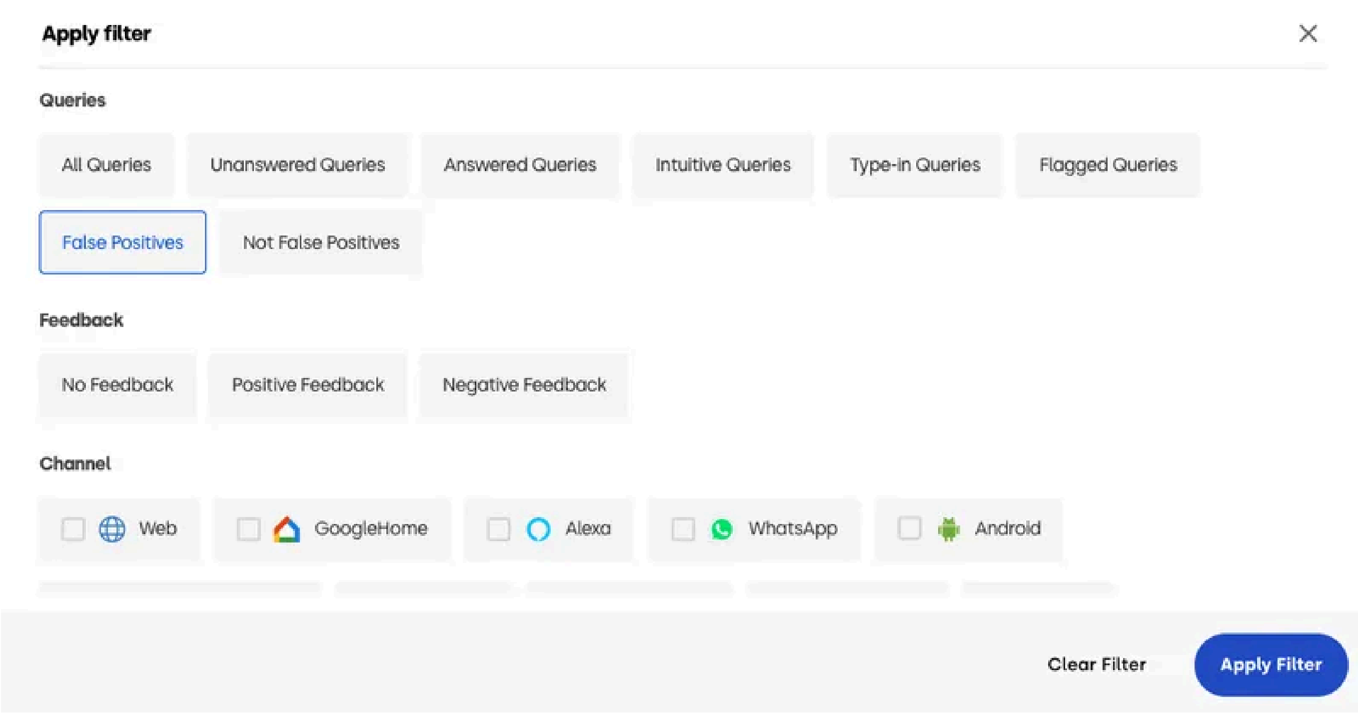
Please note :

1. The "% Match" and "Variation Responsible" data wouldn't get displayed by default. To turn it on the user has to access a toggle button present in the backend currently.
2. When the user exports this table in .xls format the 2 new data fields will also be available in the .xls report. This report would contain data for these 2 fields based on the timings these settings have been kept on from the backend. For eg : If users exports the xls report over a period of 1 week and within that 1 week, the toggle button to turn on these data fields were turned on for day 1 and day 3 and not for the other days, the report would display "Variation Responsible" and "%match" data only in Day1 and Day 3 of that week and not on other days.
3. Queries can be sorted by percentage (High to low, low to high) by clicking on the %match column header. They can also be sorted alphabetically by clicking on the "User Query" column header.
4. The “Average Accuracy” data won't be displayed if the toggle button to turn this setting on is set to off from the backend.
5. Average accuracy gets calculated based on the queries getting displayed at a particular inside message history having %match values (As a mean of this). If somebody has filtered the queries as "Type in" queries. The Average accuracy value would be displayed based on the mean of "%match" for the type-in queries getting displayed at that instant.

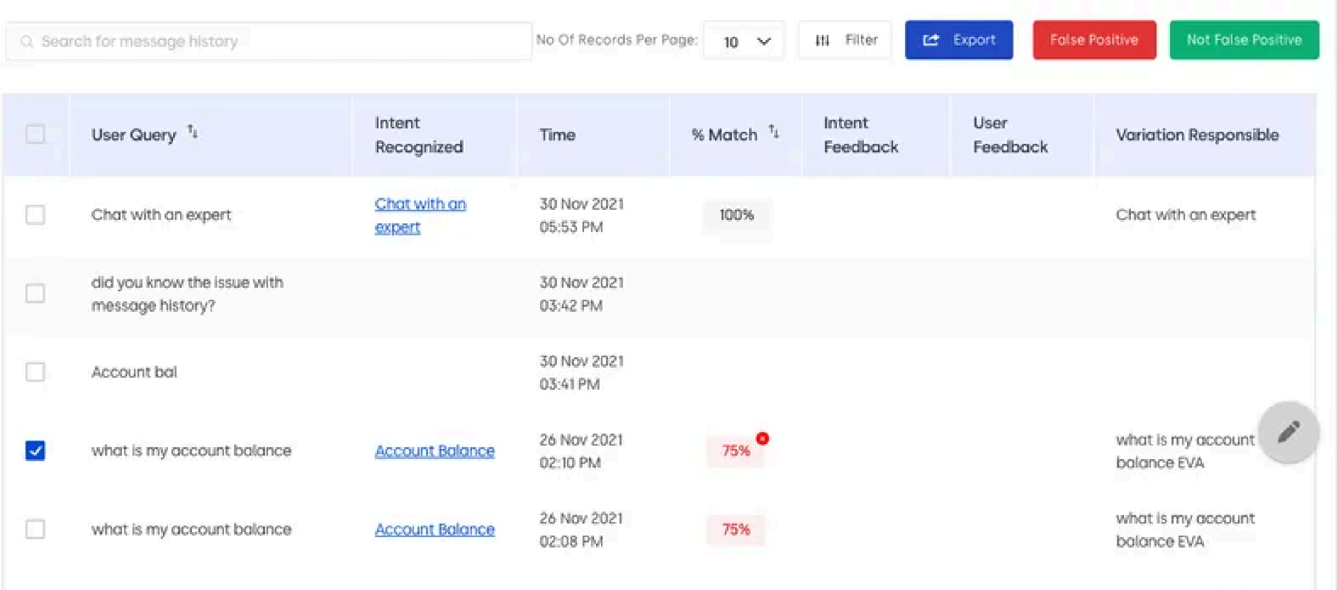
6. If Necessary Keywords, Restricted Keywords, and Intent Level Threshold Score are set for an intent, additional validations related to the above-mentioned configurations would be needed, and even if the percentage match stays more than other intents with a user query, absence of one necessary keyword in the query or presence of one restricted keyword in the query would restrict that particular intent from being triggered.
7. "Recognised Intent" filters would only filter queries where a response has been provided by the bot and won't fetch queries where the bot just gave suggestions.
8. There wouldn't be a "Variations responsible" and "% match" value for queries where the bot just gave suggestions.

Tag As False Positive

Providing an option for the users to to set a percentage threshold inside django admin.



To configure : To set a percentage threshold inside django admin → "Percentage Threshold for Message History".



All user queries having a percentage match below this will be flagged queries and the percentage representation of those queries would turn red.

(default value = 25%)

Added a filter "Flagged queries" using which users can filter out queries which are flagged (whose percentage match lies below the specified percentage inside django admin).

Also providing an option to tag "Flagged Queries" as "False Positives" and "Not False Positives".

This is visible under Chatbot Console > Message History > Toggle towards Messsage History > Select a user query to view options for False Positive/Not False Positive.

Also providing an analytical view of the number of False positives on a day to day basis inside "Message Analytics" card.

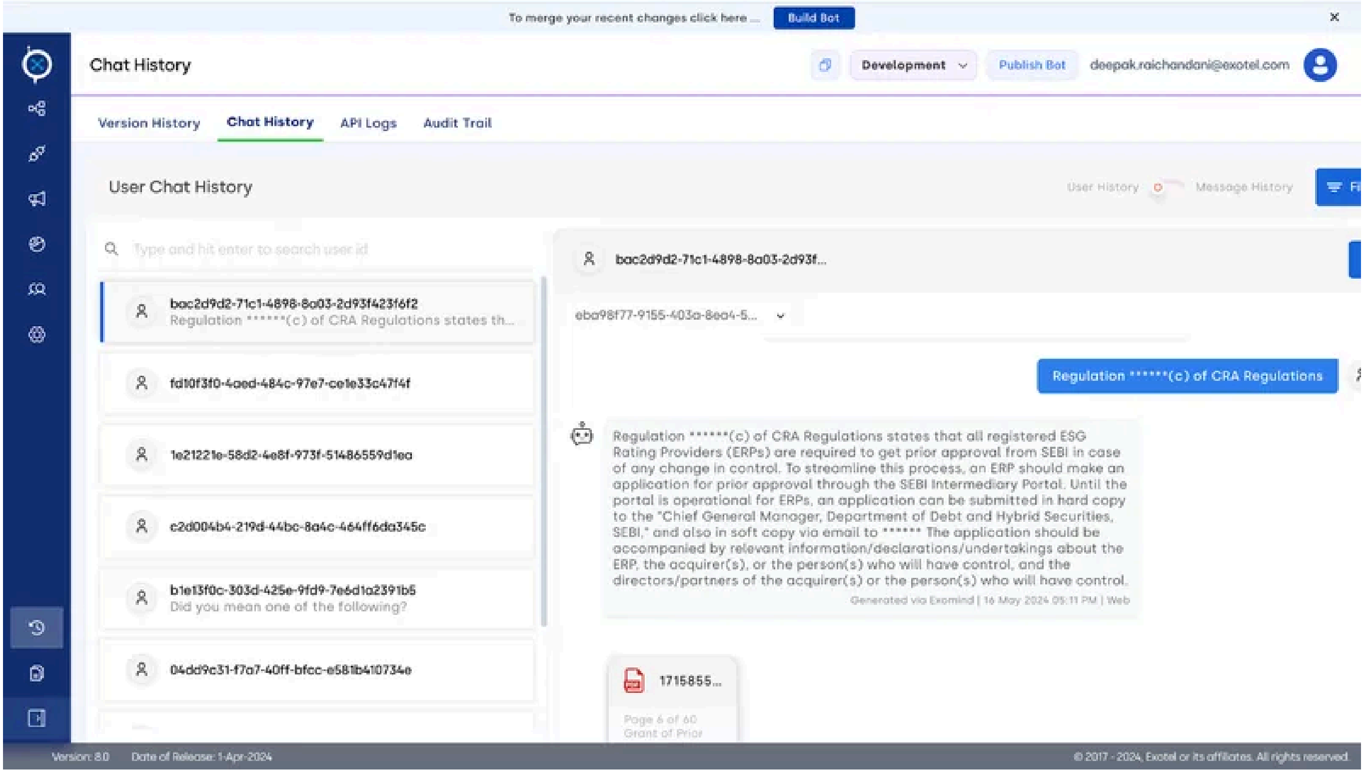
A toggle button is provided in django admin to enable the analytical view for False Positives, the column view inside message history for False Positive and Not False Positive status, and filter for False Positives and Not False Positives.

Please Note : By default it will be enabled.

Also while exporting the sheet, these values will only reflect in the exported sheet if the toggle for the same is turned on in django admin.

UI Updates :

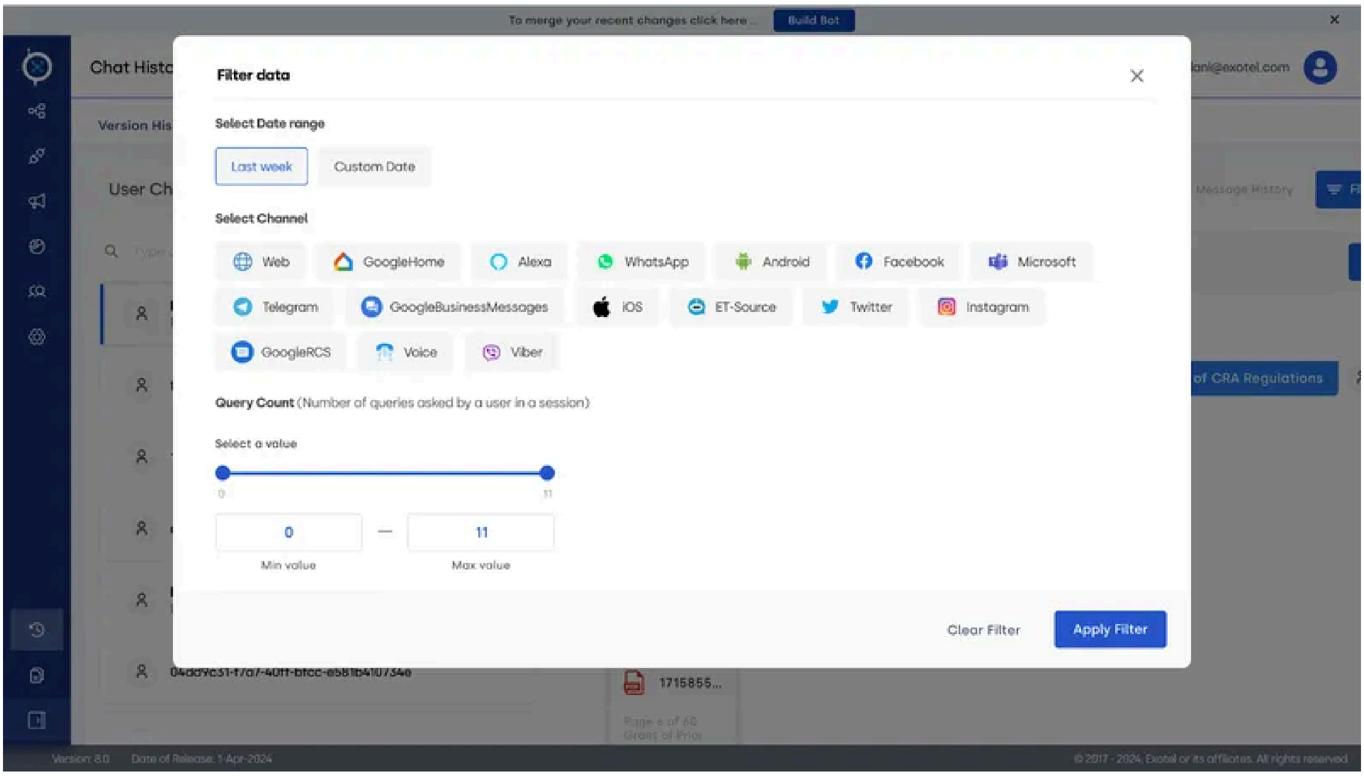
Queries with a percentage match below the specified percentage threshold in django admin will be denoted in red colour.



Refer the below shown demo for better understanding

Please note : (Limitations)

1. If a specific query is not tagged "False Positive" or "Not False Positive", the value for the same query inside "Tags" column in the exported sheet will be blank and will be represented with "-"
2. If the toggle to turn on False Positives release is enabled, the toggle for Variation Responsible and Percentage Match will also be enabled by the user.


To merge your recent changes click here ...
Build Bot
Filter data
Select Date range
Last week
Custom Date
Select Channel
Web
GoogleHome
Alexa
WhatsApp
Android
Facebook
Microsoft
Telegram
GoogleBusinessMessages
iOS
ET-Source
Twitter
Instagram
GoogleRCS
Voice
Viber
Query Count (Number of queries asked by a user in a session)
Select a value
0
11
Min value
Max value
Clear Filter
Apply Filter
Version: 8.0
Date of Release: 1-Apr-2024
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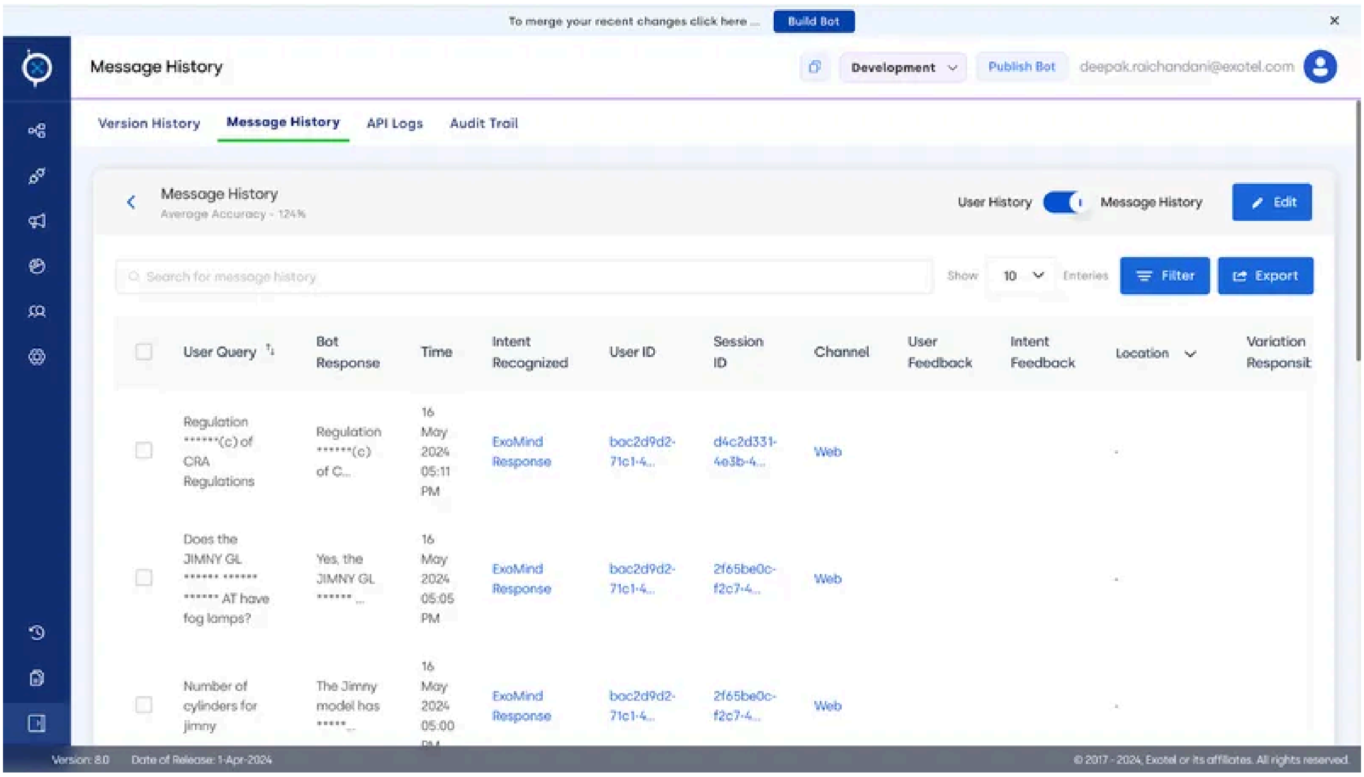
To merge your recent changes click here ...
Build Bot
Message History
Development
Publish Bot
deepak.raichandani@exotel.com
Version History
Message History
API Logs
Audit Trail
Message History
Average Accuracy - 124%
User History
Message History
Edit
Search for message history
Show
10
Entries
Filter
Export
User Query
Bot Response
Time
Intent Recognized
User ID
Session ID
Channel
User Feedback
Intent Feedback
Location
Variation Response
Regulation ******(c) of CRA Regulations
Regulation ******(c) of C...
16 May 2024 05:11 PM
ExoMind Response
bac2d9d2-71c1-4...
d4c2d331-4e3b-4...
Web
Does the JIMNY GL ****** ****** ****** AT have fog lamps?
Yes, the JIMNY GL ****** ...
16 May 2024 05:05 PM
ExoMind Response
bac2d9d2-71c1-4...
2f65be0c-f2c7-4...
Web
Number of cylinders for jimny
The Jimny model has *****...
16 May 2024 05:00
ExoMind Response
bac2d9d2-71c1-4...
2f65be0c-f2c7-4...
Web
Version: 8.0
Date of Release: 1-Apr-2024
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Chat History

Messages can be filtered based upon channels and dates in user chat history

This is visible under Message History > Apply Filter > Select DateRange/Channel(s) > Click on Apply Filter

On applying filter chats would be shown as per the selected parameters in filter

Unique sessions for the same user

Session IDs will be maintained for multiple sessions created by a unique user.

A session-id column in the message history table will redirect the console user to the particular session in the user chat history when the user clicks on the session-id.

This is visible under Chatbot Console > Analyse and Improve > Message History > User Chat History > Message History

The remaining functionality remains the same as applicable for another column in the table metadata > Message history i.e. add/remove a column, change the position of the column.

Please Note:

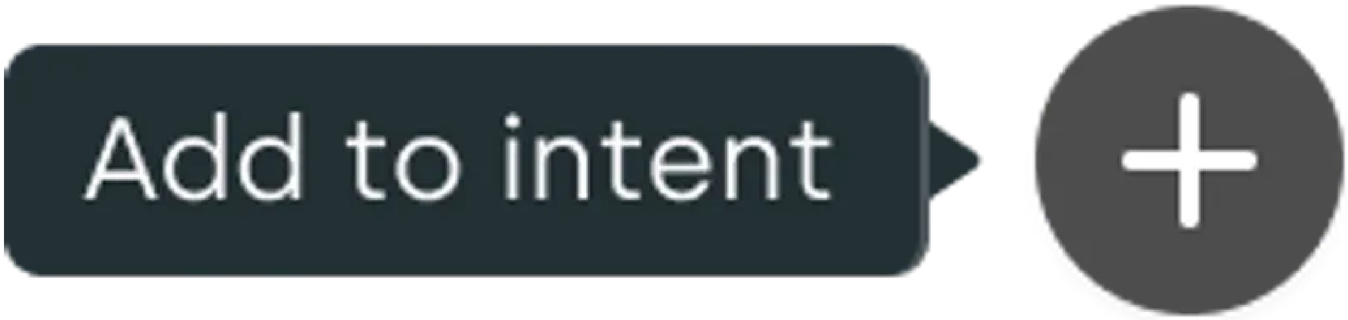
Session-Id will be captured for all channels. Also, there is no change done w.r.t the session capture for the following channels.

1.
2. Web
3. Android
4. iOS
5. WhatsApp

Session-Id for all other channels for a specific user will be counted at EOD.

Eg. For User Id: insta_7171828299, Session will end at the EOD (11:59 pm).

Clicking on the specific session-id, the console user will be redirected to the user chat history page.



User Chat History Page

This is visible under Chatbot Console > Analyze and Improve > Message History > User Chat History

UI and UX improvements have been done on the user chat history page.

A new session indicator is added which displays the session id and user query count. Every time a new session is initiated, the indicator will show the bifurcation in the chat.

Session ID dropdown is added to switch between sessions seamlessly. Selecting a session id from the dropdown will scroll down to the selected session.

The search bar added in the user id header will help in searching for any particular message(s) of the user. Console users need to simply type in and hit enter to search for the content.

Adding a user query to the intent's training question can now simply be done by hovering over the particular query > Click on (+) indicator > Select using check bot > Add to intent > Select intent. (refer to the above-shown example for a better understanding of the same).

Business Initiated & Customer Initiated Bifurcation In Message History

1.2.7. Gen AI Bot

This manual outlines the architecture, construction process, common use cases, and best practices for creating a Gen AI Chatbot using the Bot Designer.

How GenAI works with an NLP bot

Create a Gen AI Bot

1.2.7.1. How GenAI works with an NLP bot

This section explains how **GenAI capabilities** work alongside the existing **NLP-based bot framework**, how different settings influence query handling, and how to choose the right configuration based on your use case.

The platform provides two key GenAI settings:

- **AI Agent (Bot Mandate)**
- **AI Intent Assist (Orchestrator)**

These settings can be enabled independently or together to control how user queries are understood and answered. Navigate these settings under **Settings > Solution Settings**, read more here: **Solution Settings: Chatbot**.

Core Concepts

NLP Bot (Default Behavior)

By default, bots use NLP intent detection based on:

- Keywords
- Training phrases

This works well for structured, predictable conversations, but may struggle with:

- Long or ambiguous queries
- Paraphrased questions
- Multiple intents in a single message

AI Agent (Bot Mandate)

The **AI Agent** allows you to build GenAI-powered conversational flows using the **AI Agent Studio**.

Instead of relying on predefined intent matching, AI Agent flows:

- Use natural-language objectives and actions

- Handle open-ended and dynamic conversations
- Can retrieve knowledge (Exomind), call APIs, or perform logic-based actions

When enabled, AI Agent flows can generate responses directly using AI.

AI Intent Assist (Orchestrator)

AI Intent Assist improves how the bot understands user queries before deciding how to respond.

It introduces a **Query Analyzer** layer that:

- Understands the meaning of user queries
- Attempts to map queries to the closest NLP intent using AI
- The AI tries to read the user queries, all the existing NLP intents in the bot with their descriptions about what that intent does, and tries to match with the closest relevant intent.
- Reduces missed or incorrect intent detection

AI Intent Assist does **not** generate responses on its own; it only improves intent identification.

How Queries Are Processed

The behavior of the bot depends on which settings are enabled.

Scenario 1: Only NLP (Default)

Workflow:

1. User sends a query
2. NLP engine tries to match a predefined intent
3. If matched → corresponding NLP flow is triggered
4. If not matched → fallback or failure message is shown

Best for:

- Simple, structured bots
- Fixed menus and predictable queries

- It can integrate complex APIs

Scenario 2: Advanced NLP - AI Intent Assist On

Workflow:

1. User sends a query
2. NLP engine attempts keyword-based intent matching
3. If no intent is found:
    - It passes to the AI Intent Assist, where AI analyzes the query
    - Attempts to identify the closest matching NLP intent (based on intent name and description)
4. If intent is identified → Matched NLP flow is triggered
5. If still not identified → failure or fallback message

Important Notes:

- AI is used only for **intent detection**, not response generation
- AI Agent flows are **not used**

Best for:

- Businesses that want better intent accuracy
- Customers who do not want AI-generated responses
- Improving NLP performance without changing bot behavior

Scenario 3: Only Gen AI Bot - AI Agent On

Workflow:

1. User sends a query
2. Query is routed directly to **AI Agent flows**
3. AI Agent determines how to respond using objectives and actions
4. Response is generated by AI
5. No NLP intents are used.

Important Notes:

- A default AI Agent flow will be created, and the user will have to update the Prompts for the Supervisor & Sub-Goal nodes.
- NLP intent detection is not used
- The bot relies entirely on the AI Agent logic
- NLP flows are preserved but inactive

Best for:

- Fully GenAI-based bots
- Bots designed for free-flow conversations

Scenario 4: Hybrid Bot - AI Intent Assist & AI Agent On

This is the most complete and flexible setup.

Workflow:

1. User sends a query
2. NLP intent detection is attempted
3. If no match:
    - AI Intent Assist analyzes the query
    - Attempts to map it to the closest NLP intent
4. If an NLP intent is identified → NLP flow is triggered
5. If no intent is identified:
    - Query is routed to the AI Agent flows
    - AI Agent generates the response and completes the flow.
6. If the AI Agent cannot handle and generate a response → fallback message is shown

Key Benefits:

- Preserves structured NLP flows
- Uses AI only when needed
- Provides a safe fallback mechanism
- Reduces hallucinations and incorrect answers

Best for:

- Production bots
- Gradual GenAI adoption
- Combining structured flows with GenAI flexibility
- New gen bots

Current Limitations

- The platform currently supports **NLP-first with AI Agent fallback**
- AI Agent-first with NLP fallback is **not supported**
- Reason:
  - NLP flows support richer UI components (CTAs, media, forms)
  - AI Agent flows are still evolving toward feature parity

Once AI Agent flows support all NLP components, additional routing configurations will be introduced in a future release.

Choosing the Right Configuration

Use the table below to decide which settings to enable:

Use Case	Recommended Settings
Only NLP Bot: Use only NLP Workflows (No Gen AI Features) - Default Option	AI Agents (Bot Mandate) = OFF AI Intent Assist (Orchestrator) = OFF
Advanced NLP: Improve the intent accuracy of the NLP Bot, without AI responses	AI Agents (Bot Mandate) = OFF AI Intent Assist (Orchestrator) = ON
Only GenAI Bot: Build a Gen AI-based Bot without any NLP Workflows	AI Agents (Bot Mandate) = ON AI Intent Assist (Orchestrator) = OFF
Hybrid Bot: NLP Workflows followed by AI Agents	AI Agents (Bot Mandate) = ON AI Intent Assist (Orchestrator) = ON

Best Practices

- Start with **AI Intent Assist** to improve NLP reliability
- Add an **AI Agent** gradually for fallback and complex queries
- Use AI Agent for:
  - FAQs
  - Knowledge-based queries
  - Open-ended questions
- Keep transactional and UI-heavy flows in NLP until the AI Agent supports full parity

1.2.7.2. Enable AI Agent (Bot Mandate)

What is AI Agent

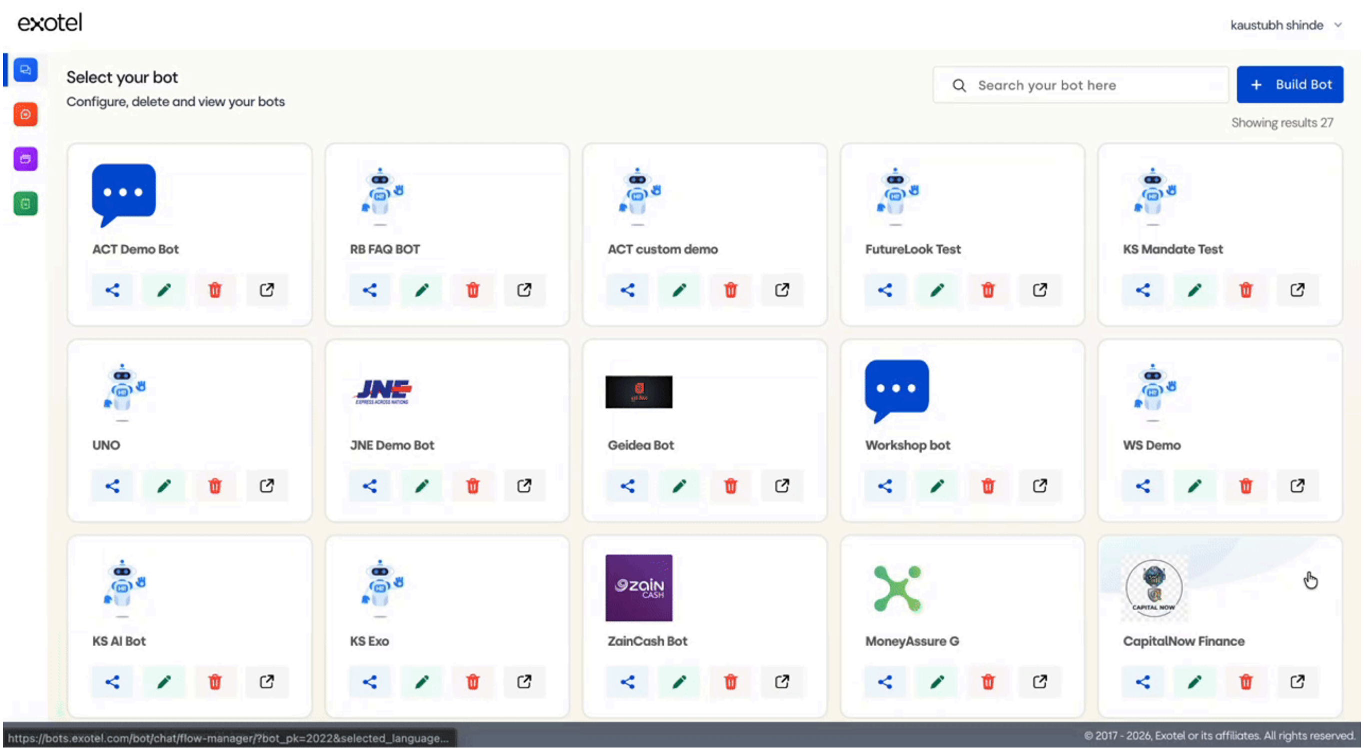
AI Agent enables GenAI-powered conversational flows using natural-language objectives and actions. It allows bots to handle free-flow conversations beyond predefined NLP intents.

How to Enable AI Agent

1. Open your bot
2. Go to **Settings** → **Solution Settings**
3. Enable **AI Agent (Bot Mandate)**.
4. Read and confirm the behavior in the modal.

Once enabled, **AI Agent Studio** appears in the left navigation as **Agents**.

> **Note:** If the feature might not be available on your bot, please reach out to your respective Account Manager to get it enabled.



How to Configure AI Agent

When the AI Agent is enabled:

- A **default workflow** is auto-created:
    - Supervisor node
    - Example sub-goal nodes
        - One Normal AI Agent
        - One FAQ AI Agent (For Exomind)

All three with Sample prompts

- You can edit:
    - Objectives
    - Routing logic
    - Node Names
    - Add or delete the nodes based on your requirements

Important Configuration Note

- To use NLP + AI together, enable **AI Intent Assist** for better results.

How to Use Existing Default Flows

- Use the Supervisor node to route queries
- Customize sub-goal prompts for your use case
- Add actions like:
    - Exomind (knowledge base)
    - APIs
- Deploy the bot after changes

The default setup is designed as a **starter template** that can be extended.

How to Test an AI Agent

- Test open-ended user queries, ask general queries like - What can you do? How can you help me?
  - It will provide an answer related to the topic and the use case it is trained on.
- Validate routing to correct sub-goals
- Test fallback behavior
- If Exomind is used, verify factual accuracy by asking any question from the trained file.
- Test with AI Intent Assist ON and OFF to confirm expected behavior

1.2.7.3. Create a Gen AI Bot

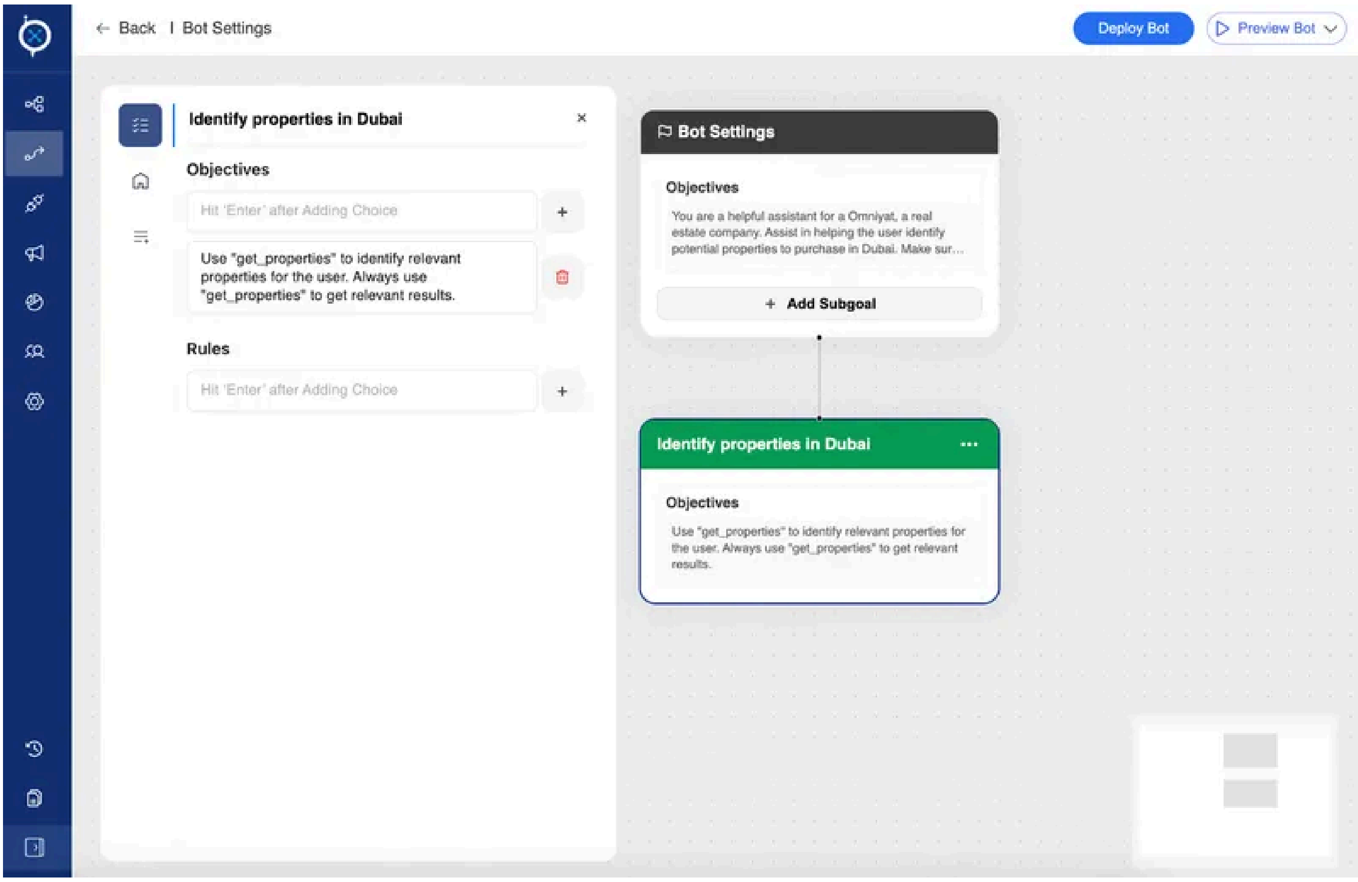
This comprehensive user manual guides you through the process of developing a Gen AI Chatbot using the Bot Designer. It covers the architectural overview, step-by-step construction, common use cases, and essential best practices to ensure optimal performance.

1. Introduction to the Gen AI ChatBot

The Gen AI ChatBot is engineered with a sophisticated two-tiered architecture:

- **Delegator (Bot Settings)/ Supervisor:** This is the bot's central intelligence. It analyzes user input to identify the correct objective (user intent) and directs the query to the appropriate "Goal." The Delegator can also respond directly if it possesses sufficient context.
- **Individual Goals (Outcomes):** These are specialized agents that handle specific user queries. They effectively replace traditional Natural Language Processing (NLP) intents by allowing the Delegator to dynamically determine the user's intention based on conversational context. Currently, the architecture supports a single level of goals, meaning sub-goals are not permitted.

When you select either the Delegator or a specific Goal in the Bot Designer, a side-panel appears, providing access to three crucial configuration tabs: **Objectives**, **Settings**, and **Tools**.

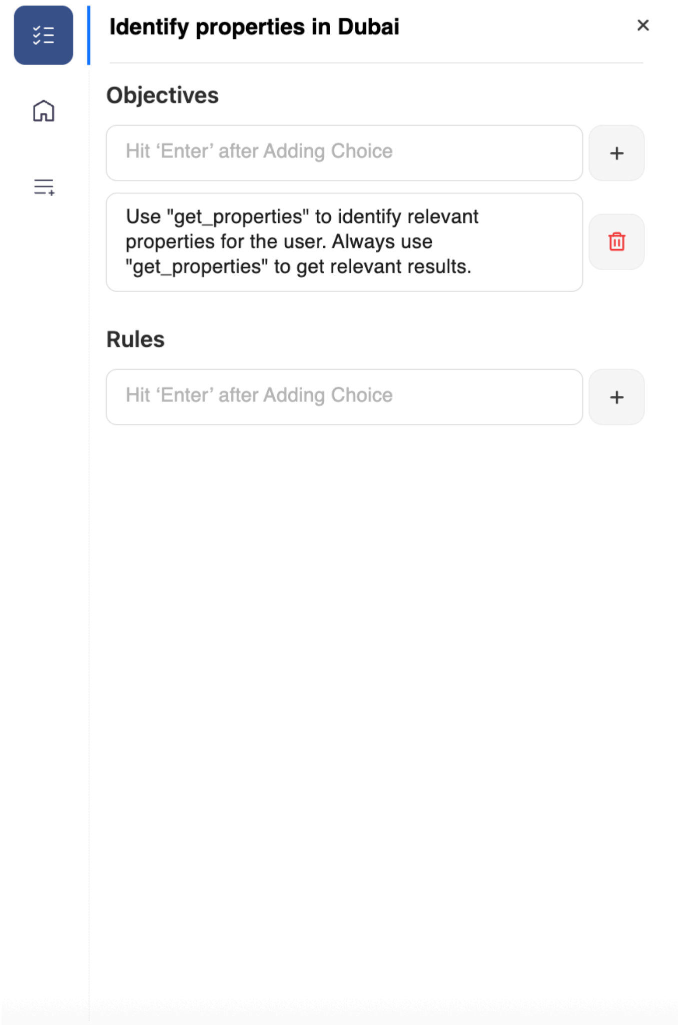


2. Constructing Your Gen AI ChatBot

Building your Gen AI ChatBot involves a systematic configuration process of the Delegator and its associated Goals.

2.1 Defining Core Bot Instructions

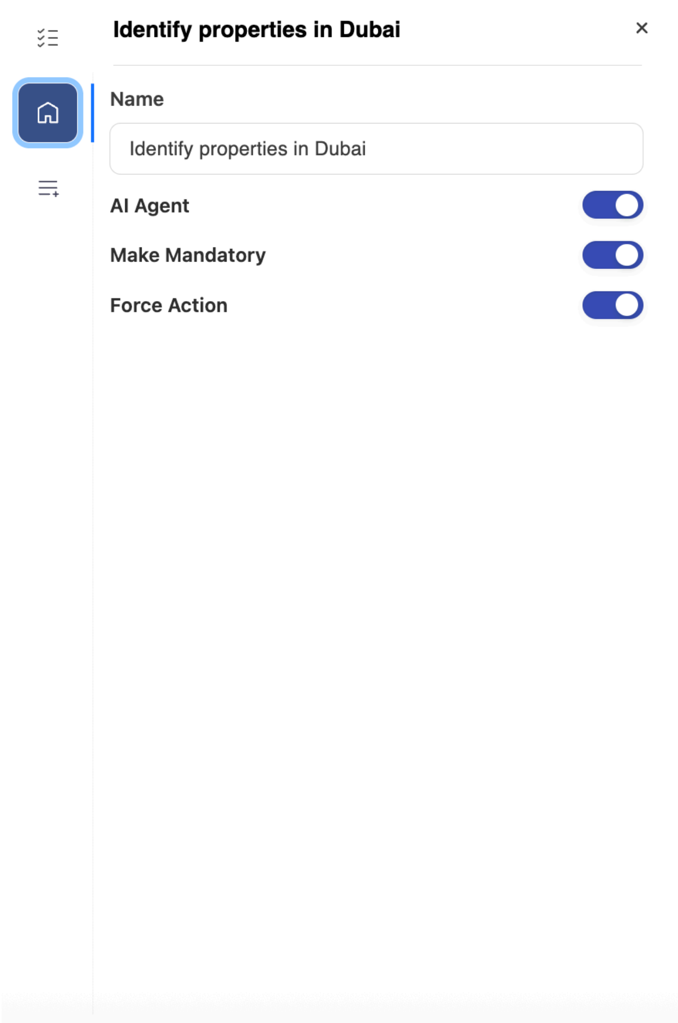
Begin by outlining the fundamental instructions for your bot within the Delegator's **Objectives** and **Rules** fields. It's important to understand that while these are presented as separate fields, their content is combined and fed to the Gen AI bot as a **single, unified input**. This input must be comprehensive, including all necessary bot instructions and any references to tools, to ensure accurate and relevant execution.



2.2 Adding and Naming Goals

Next, you will add Individual Goals to your bot. This is done by selecting the "Add Subgoal" option within the Delegator's interface.

For each new goal you create, navigate to its Settings tab and provide a short, crisp Name. This naming convention is crucial as it helps the Delegator quickly and accurately identify the correct objective during a live conversation.

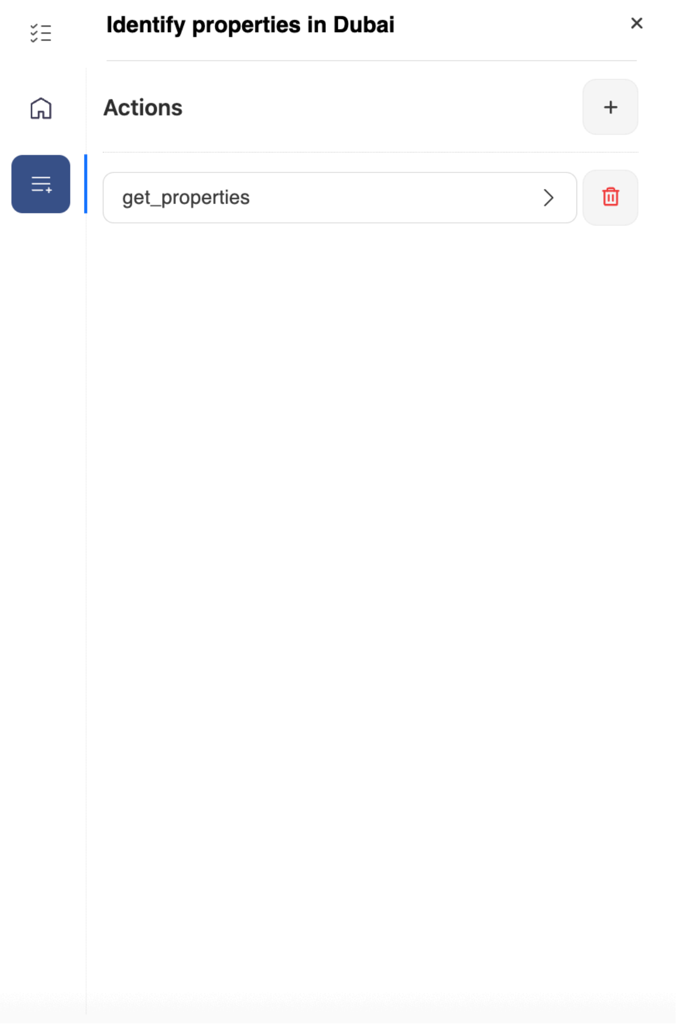


2.3 Configuring Goal Instructions

Within each Goal, access the **Objectives** tab to outline specific instructions pertinent to that particular outcome. These instructions guide the goal on how to process user queries and interact with tools.

2.4 Enabling and Configuring AI Agent Tools

To empower your goals to interact with external functions, toggle the AI Agent switch to ON within the Goal's Settings tab.



Once enabled, you can configure external tools in the Tools tab. The Bot Designer supports two primary types of tools: ExoMind and APIs. A single goal can be configured to utilize multiple tools.

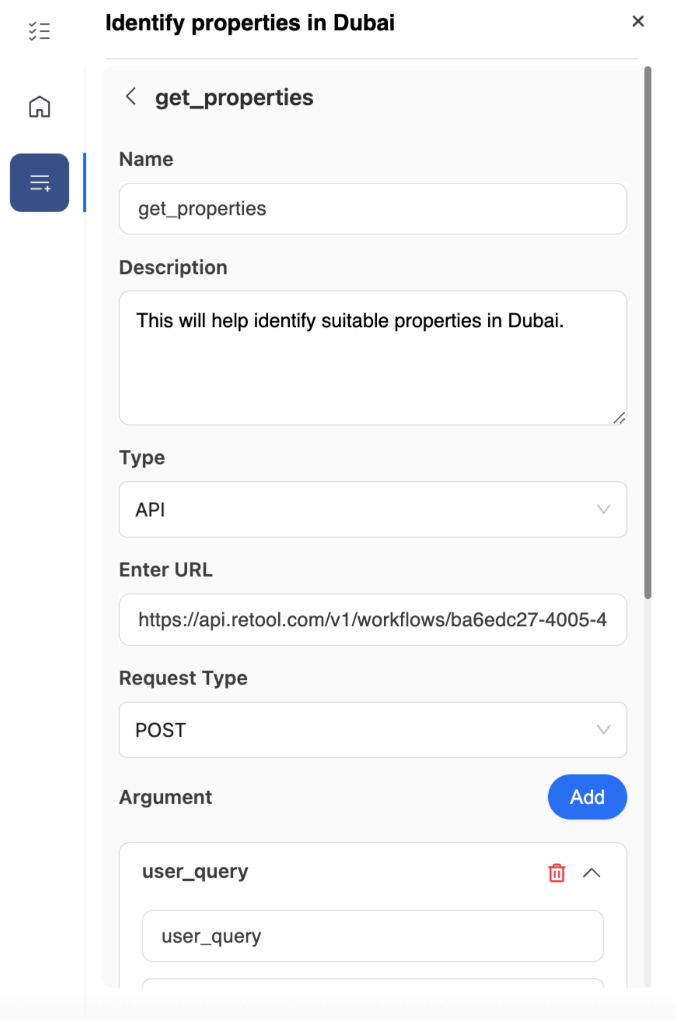
Key Tool Configuration Details:

- **Name:** Provide a clear and concise **Name** for your tool. Crucially, **tool names cannot contain spaces**. The AI agent uses this name to decide when to invoke the tool.
- **Description:** Write an accurate and detailed **Description** of what the tool does. This description is vital for the AI agent to understand the tool's functionality and determine its relevance to a user query.

For an **API** tool, you will need to specify additional details:

- **URL:** The endpoint for your API call.
- **Request Type:** Currently, only JSON-based REST API calls are supported.
- **Arguments:** The parameters required by your API.
- **Headers:** Any necessary HTTP headers for the API request.

- **Response Variable:** The variable that will store the API's response.



2.5 Advanced Tool Use: Force Action and Make Mandatory

- **Force Action:** Located in the Goal's **Settings**, the **Force Action** toggle is used for scenarios where an external data call is absolutely essential. When enabled, it compels the goal to call its configured tool at least once before generating a response for the user.
- **Make Mandatory:** Also found in the Goal's **Settings**, the **Make Mandatory** toggle is used if the bot must fulfill this specific goal during every user session.

3. Common Use Cases

The Gen AI ChatBot architecture is ideally suited for complex conversational flows that demand context-aware delegation and integration with external functionalities.

- **Customer Support & Information Retrieval:** Configure goals to delegate queries to an API to fetch real-time information, such as order status, account balances, or product availability. Alternatively, use an ExoMind tool to retrieve information from a knowledge base.
- **Forced Action Scenarios:** For situations where an external data call is non-negotiable (e.g., checking inventory before confirming an item's stock), enable **Force Action** for the relevant goal to ensure the necessary API call is executed.

4. Best Practices for Optimal Performance

Adhering to these best practices will significantly enhance your Gen AI ChatBot's performance, accuracy, and maintainability.

- **Instruction Clarity:** Feed all necessary instructions, including explicit references to tools, into the Delegator's **Objectives** and **Rules** fields. The more comprehensive and clear your instructions, the better the bot will understand its role and execute tasks.
- **Concise Goal Naming:** Use **short and crisp names** for your goals. This makes it easier for the Delegator to quickly and accurately identify the correct objective for any given user query.
- **Precise Tool Configuration:** The tool's **Name** and a detailed **Description** are critical for the AI agent's decision-making process. Ensure these are accurate and unambiguous. Remember that tool names **cannot contain spaces**.
- **Leverage ExoMind for Accuracy:** When retrieving information from a knowledge base, prioritize using **ExoMind**. A key advantage of ExoMind is that prior results are *not* included in the chat history shared with the Large Language Model (LLM). This leads to a **smaller prompt size** for the LLM, which generally translates to **increased accuracy** and more efficient response generation.
- **Advanced API Handling with Functions:** For complex API interactions, such as those involving nested JSON request bodies or the need to parse nested key-value pairs from a response, it is a best practice to use **in-house functions** to manage the API logic. Avoid attempting to configure these complexities directly within the Bot Designer's API fields, as this can lead to errors and reduced maintainability.

1.2.7.4. Category Mapping - Gen AI Bot

Feature Overview

This feature introduces **node-level visibility** and **category mapping** for GenAI (Bot Mandate) nodes in Chatbot Analytics.

With this feature:

- Each **Bot Mandate Subgoal** is tracked individually under *Most Frequent Questions, Least Frequent Questions & Unanswered Frequent Questions*.
- **Category Mapping** ensures Bot Mandate nodes appear in *Category-wise Usage* charts, alongside Workflow (NLP) nodes.
- Businesses gain a **complete view of bot performance** across both Workflow and GenAI nodes.

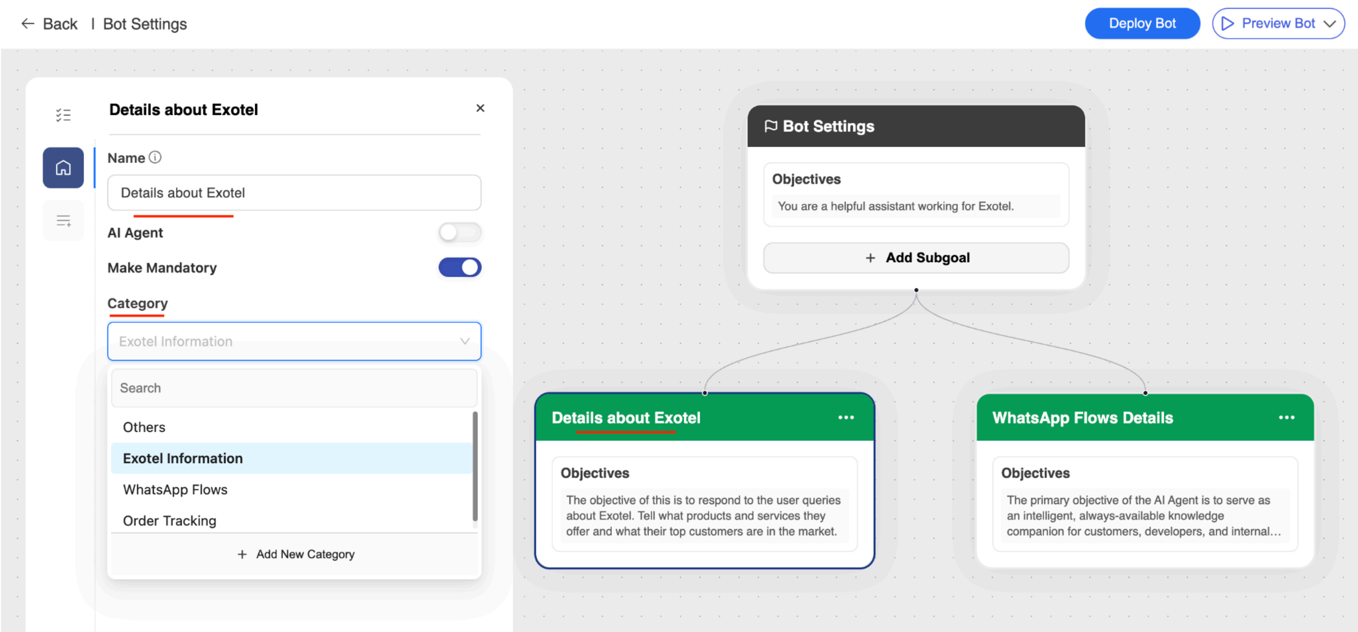
How to Use This Feature

Creating or Editing AI Agent Nodes

1. Log in to your Chatbot console and select the Bot where Gen AI is enabled.
2. Navigate to **Flow Builder, go to AI Agents from the LHS navigation bar.**
3. **Create a Subgoal node**.
4. Enter a **Node Name** *(mandatory)* - This will appear in Analytics.
5. Select a **Category** *(mandatory)*:
    - Choose from the dropdown list of existing categories, or
    - Create a new category on the go.

- If unsure, select **“Others.”**

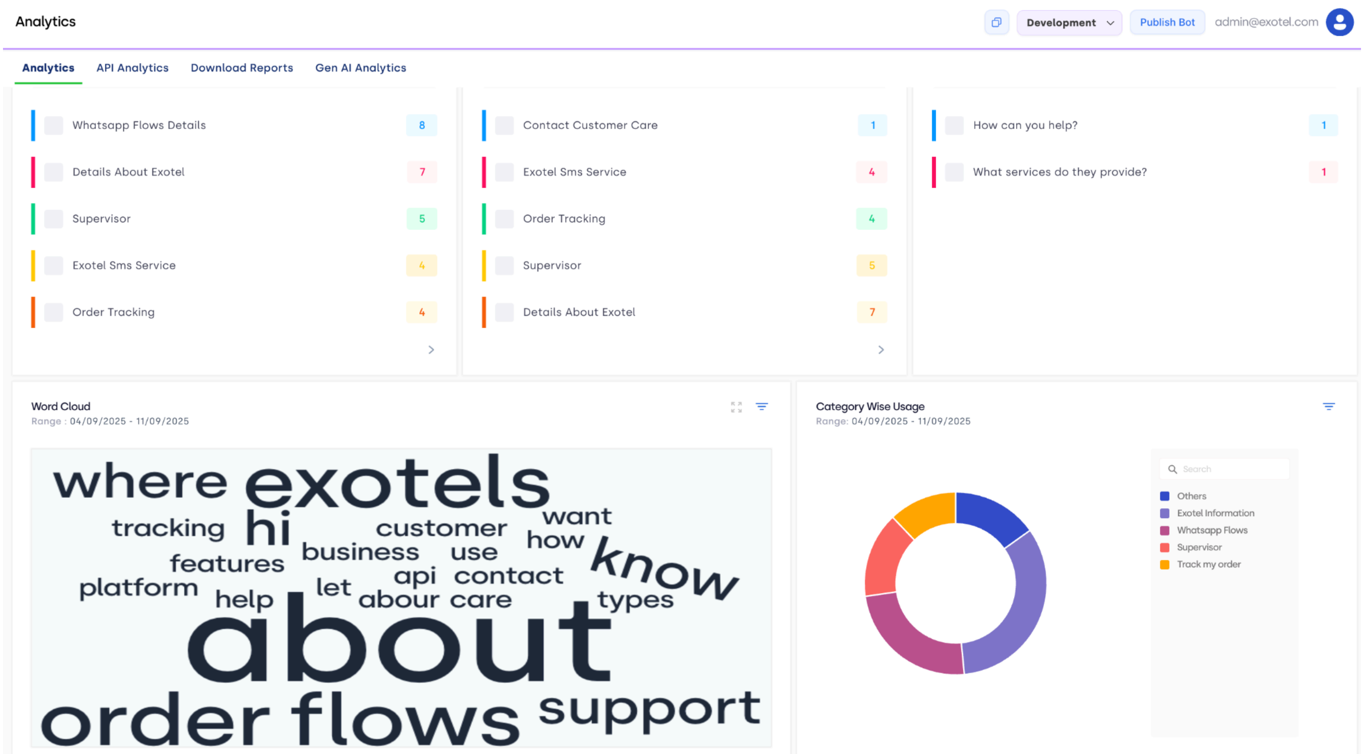
6. Add the **Objective** to the Subgoal of that node.
7. Click **Save.** The system will not allow saving if the Node Name or Category is missing.



Viewing Analytics

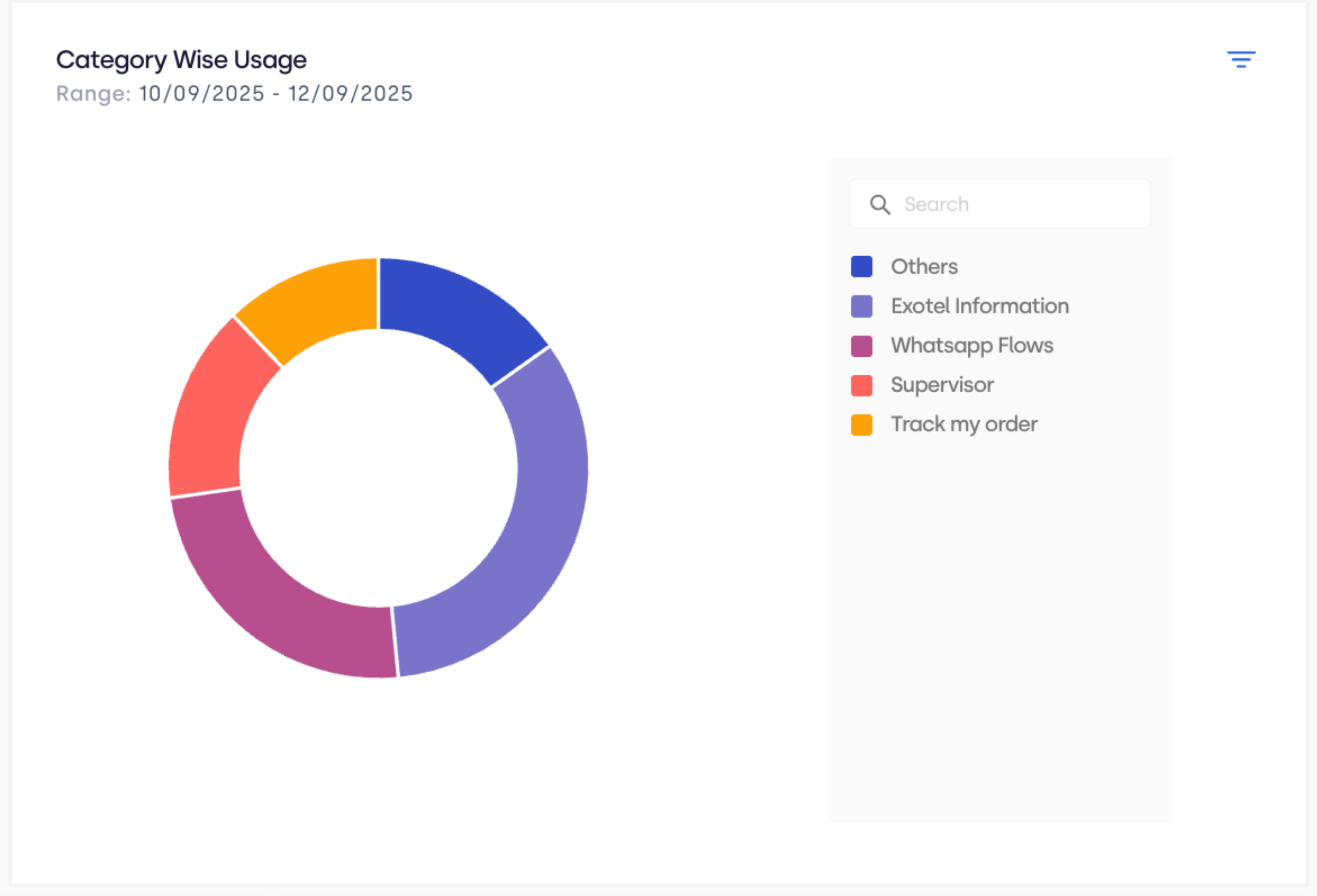
Node-Level Analytics

1. Go to **Chatbot Analytics - Questions Section**.
2. You can now view **Most Answered, Least Answered, and Unanswered Questions**.
3. Counts for **all nodes** (Workflow + GenAI) are displayed, with Bot Mandate nodes tracked individually.



Category-wise Usage

- Navigate to **Chatbot Analytics - Category-wise Usage**.
- View combined counts of Workflow + GenAI queries, broken down by categories.
- Uncategorized nodes are automatically grouped under **“Others.”**



Best Practices

- Using clear, descriptive names for Nodes makes analytics easier to interpret.
- Always assign a Category (mandatory field). If unsure, use "Others."
- Regularly review analytics to optimize prompts and improve GenAI accuracy.
- Compare normal Workflows vs Bot Mandate performance to guide the transition toward GenAI-first bot design.

1.2.7.5. Best Practices & AI Agent Prompt Guide

Best Practices for creating Prompts for Customer Demo BOTs (with both ExoMind and AI Agents)

Step 1: Create an FAQ for Exomind

1. Create an FAQ document for ExoMind
2. Guideline for FAQ doc - **Best Practices for creating documents for ExoMind**
3. Sample FAQ document - **Credit Card - FAQs**

Step 2: Identify the AI Agent use case

1. Identify the AI Agent use cases
2. Create a use case document for all the AI Agents together.
   1. This doc should have a description of all the flows that you want to create.
   2. The customer can also share this document with you.
3. Use the below prompt, “to create prompts”, to be added in any

Meta-Prompt to create Bot prompts

The Prompt that you can use to create actual prompts for Supervisor & AI Agent nodes (sub-goal) while attaching the use case document given by the customer.

```
This document does NOT specify nodes, routing, or bot structure. Your job is
to convert this raw use-case file into a full AI Agent Prompts.

Supervisor Prompt - The node hosts the information about the bot
characteristics like name, tone, language, and the use case it supports, with
the routing logics.

Sub-Goal Nodes - The node is created to perform tasks like answering certain
```

```
FAQs, collecting details, building an API flow, etc. We should not have
larger use cases in a single sub-goal.

Follow these steps:

1. Identify Nodes - Read the use-case document and break it into logical
nodes, such as: Supervisor Node (Bot name, tone, intent detection & routing
logic).
Subgoal nodes for - FAQ / Knowledge Node, Action or Process Nodes, Error or
Clarification Node. List the nodes and explain why they are needed.

2. Generate Supervisor Node Prompt Create a complete Supervisor Node prompt
that includes: Objective of the Supervisor node (intent classification only),
Bot name & tone, Routing logic for all nodes Priority rules, Error-handling
rules, Clear instructions: “Never answer the user, only route.”

3. Generate Node Prompts for Every Other Node. For each node, generate a
prompt that includes: Objective Bot name & tone, What types of queries it
handles, Instructions on how to answer, What to do when information is
missing, Error-handling rules

4. Make the final output clean. Give me the final deliverable as: Supervisor
Node, Prompt Node 1, Prompt Node 2, Prompt Node 3.
```

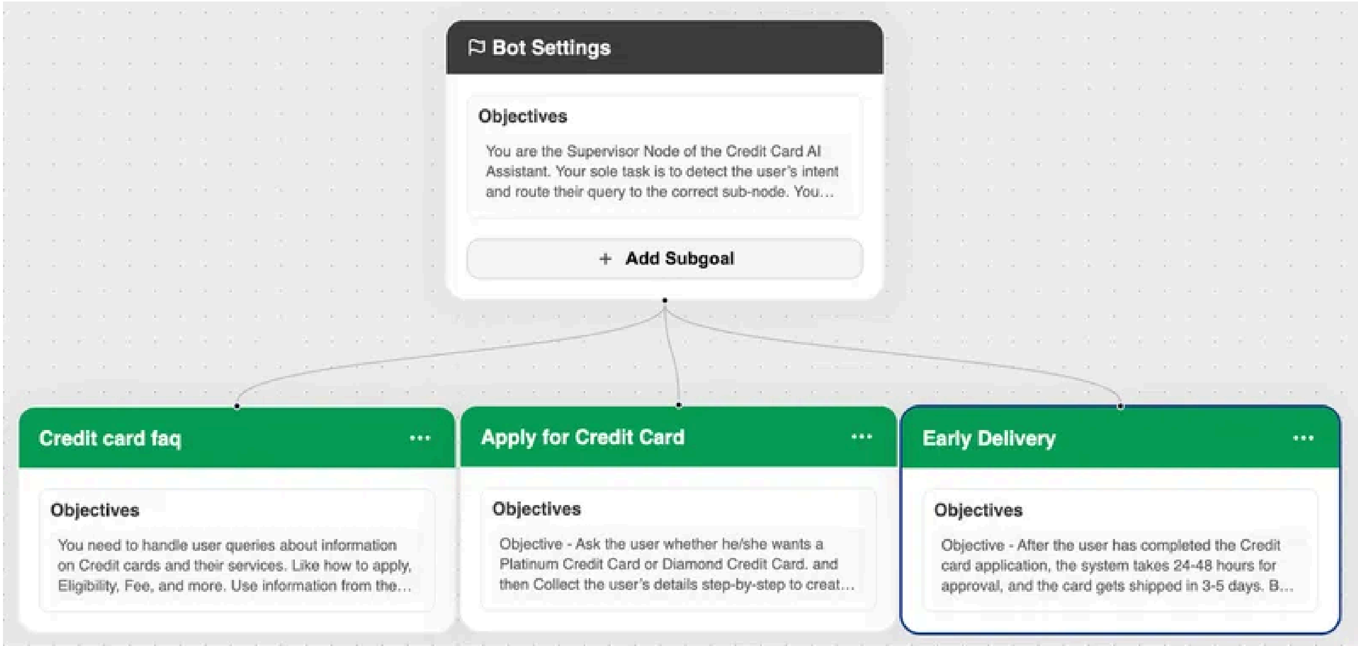
Components of an AI Agent Bot

The Prompts required for AI BOTs are -

#	Node Type	Technical Name	Where to put the prompt	What should be in the Prompt
1	BOT Settings	Supervisor Node	Objective	1. BOT Persona 2. Routing Logic 3. Tone 4. Error Handling / Guardrails
2	Sub-Goal	AI Agents (With Exomind attached)	Objective	How to form the user's answer based on the chunks retrieved.
			Action - Description	What part of the chunks are retrieved to be used for generating the answer
3	Sub-Goal	Agentic AI Agents without Exomind	Objective	1. Define Objective for AI Agents 2. Flow Logic / Flow order 3. Give Business Rules 4. User Input and its validations 5. Error Handling / Guardrails

Example Prompt

Prompt for the Credit Card Service use case:


Bot Settings
Objectives
You are the Supervisor Node of the Credit Card AI Assistant. Your sole task is to detect the user's intent and route their query to the correct sub-node. You…
+ Add Subgoal
Credit card faq
Objectives
You need to handle user queries about information on Credit cards and their services. Like how to apply, Eligibility, Fee, and more. Use information from the…
Apply for Credit Card
Objectives
Objective - Ask the user whether he/she wants a Platinum Credit Card or Diamond Credit Card. and then Collect the user's details step-by-step to creat…
Early Delivery
Objectives
Objective - After the user has completed the Credit card application, the system takes 24-48 hours for approval, and the card gets shipped in 3-5 days. B…

Supervisor/ Bot Settings - Objective	You are the Supervisor Node of the Credit Card AI Assistant. Your sole task is to detect the user's intent and route their query to the correct sub-node. You must never answer questions or collect details yourself; only classify and route. Tone Tone: Friendly, concise, professional, and neutral. Keep responses short and strictly focused on routing and use emojis if required. You should greet the user and provide the information about what all details does this AI assistant help and how to proceed. Route Logic to Each Node 1. Route to the 'Credit card faq' Node when the user asks factual or informational queries, including: Eligibility, income criteria Documents required Fees, charges, limits Rewards, benefits, cashback Interest rate, billing cycle, EMI Security, fraud, international usage Lounge access How to apply? (only if user is NOT trying to start an application) 2. Route to the 'Apply for Credit Card' Node when the user expresses intent to apply, such as: I want to apply I want a credit card Yes, apply for credit card Start my application Check my eligibility to apply I want to submit my details

	Immediately start the flow. 3. If the user is asking for early delivery of the credit card or wants to connect to a human agent then escalate the chat using "chat_with_an_agent" in the query. If the user mixes both - e.g - What are the fees and I want to apply?, always prioritise the faq and then ask them to start the application process using the 'Apply for the Credit Card node'. Your output must only state the routing decision and a short explanation (e.g - Routing to FAQ Node user is asking about fees.). Error Handling Rules If the message is unclear or off-topic, ask the user to clarify whether they want credit card information or want to apply. Never guess intent. Never answer FAQs or collect personal data yourself. Only route to the appropriate node once intent is explicit.
Credit Card Faq - Objective (connected to Exomind)	You need to handle user queries about information on Credit cards and their services. Like how to apply, Eligibility, Fee, and more. Use information from the fetched chunks and give factual answers. User emojis to keep it conversational and engaging If the user asks to apply for a Credit card, then route the query to the 'Apply for Credit Card' node and start teh flow.
Credit card Faq - Action ->	Get the user query matched information chunks with respect to user queries related to the credit card and generate the response. Prioritize chunks that have a 'question' and 'answer' format. Please rephrase the user query with

Description (connected to Exomind)	some past message history for better matching of chunks. Do not add new information
Apply for Credit Card - Objective (AI Agent not connected to Exomind)	Objective - Ask the user whether he/she want a Platinum Credit Card or a Diamond Credit Card. and then collect the user's details step-by-step to create a credit card application lead. Validate inputs, handle errors politely, and end with a clear confirmation summary. This node should trigger for queries like 'Apply for Credit card', 'Yes, apply for credit card' Bot Behaviour 1. Friendly, supportive, and professional. 2. Ask one question at a time and validate before moving ahead. 3. Keep responses short and easy to read. Follow the exact sequence of data collection. 1. Data to Collect (In Order) 2. Full Name - alphabets and spaces only 3. Verification Type - Aadhaar or PAN 4. Aadhaar: 12 digits 5. PAN: AAAAA9999A 6. Email - valid email format 7. Phone Number – 10 digits; starts with 6/7/8/9 Flow Instructions 1. Start by asking for the user's full name. 2. Validate each answer; if invalid, explain and re-ask. 3. After collecting all items, generate a clear lead summary with the four details. 4. Close with a confirmation message: "Your lead has been submitted." 5. Do not continue further once the application is complete. Output: When asking the details, follow this simple structure:

	- Briefly acknowledge the previous valid detail in 4 to 5 words. - One line gap and ask for the next detail. - One line gap - Show expected format/validation. This makes it easy to understand and read. Example: 'Thank you, user_name. Could you please specify your preferred verification type? You can choose either Aadhaar or PAN.' Error Handling 1. If the user gives incorrect data, explain the expected format and ask again. 2. If the user goes off-topic, gently redirect them. 3. If they want to stop, close the flow politely.
Early Delivery → Objective (AI Agent not connected to Exomind)	Objective - After the user has completed the Credit card application, the system takes 24-48 hours for approval, and the card gets shipped in 3-5 days. But some customers ask for early delivery, and your task is to explain the process to the customer and ask them to wait for 4-5 days. In case if they still push for early delivery, then understand the urgency and escalate it to the human agent by appending 'chat_with_an_agent' after the message and assigning an agent to chat. Do it gracefully and try to help the user.

1.2.8. LiveChat - AI Chat Summary

AI Conversation Summary for ECC Live Chat Agents

What is this feature?

When customers escalate from your chatbot to a live agent, they no longer have to repeat themselves. AI Conversation Summary automatically generates a concise summary of the chatbot conversation when the chat is transferred to an ECC Live Chat agent.

The summary is added to the conversation and helps agents quickly understand the customer's query, actions already completed by the chatbot, and any relevant context before responding.

Benefits

Your agents now get:

- **Instant context** - No need to scroll through chat history
- **Complete picture** - Key customer intent, payment details, actions already taken
- **Faster resolutions** - Agents jump straight to solving
- **Better customer experience** - No repetition, faster help

Prerequisites

Before enabling this feature, ensure:

- A chatbot is configured and live
- ECC 6X setup
- Live Chat credentials configured with the chatbot

- Live Chat agents have access to the ECC 6X Agent Console
- Chatbot-to-Live Agent transfer flow is configured on the bot

Supported Integration

This is supported by:

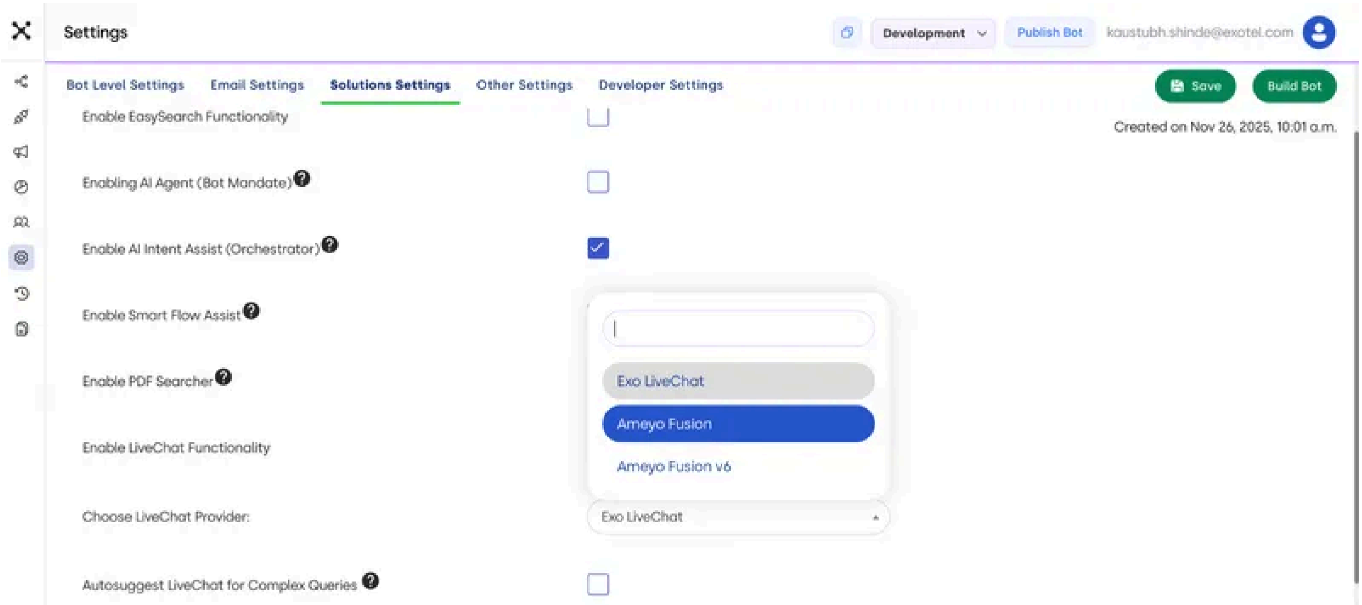
- 6x Livechat
- 4x Livechat (in progress)
- Exotel Livechat (in progress)

Currently supported for chatbot conversations escalated to ECC Live Chat through:

- Web Chat
- WhatsApp

How to Enable

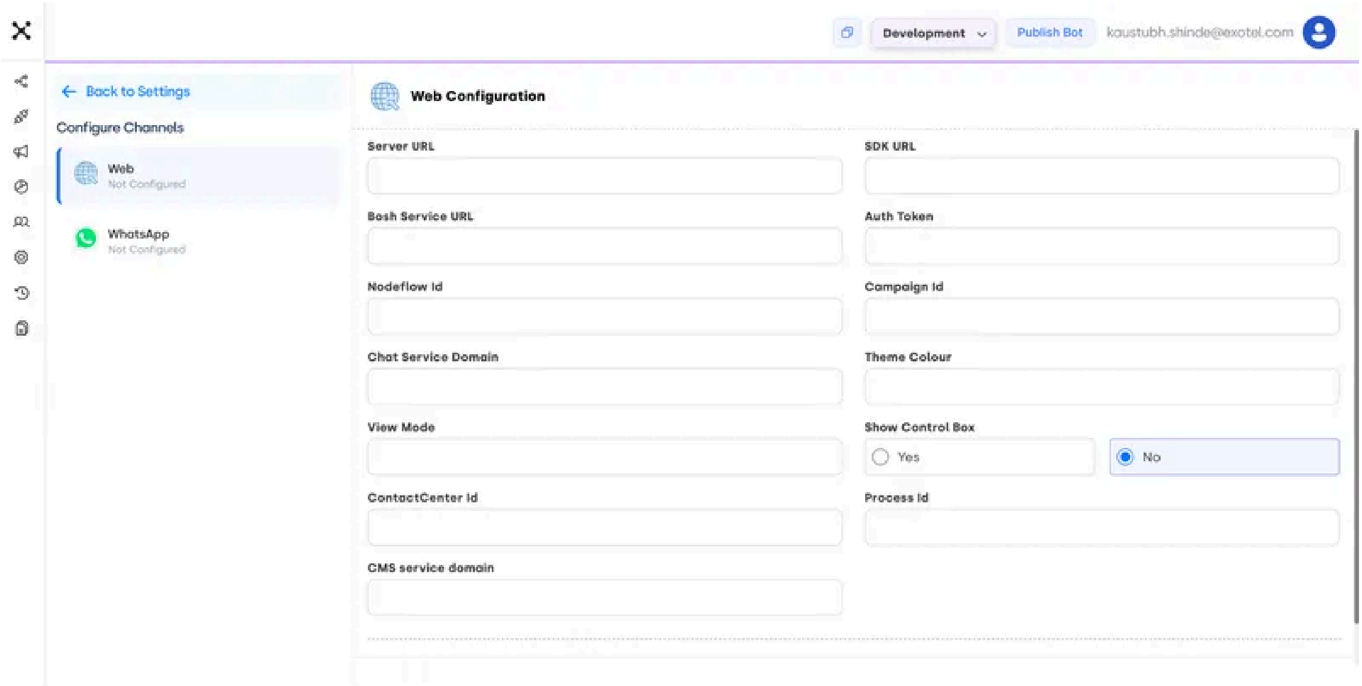
1. Navigate to the Chatbot settings page > go to Solution Settings.
2. Navigate to the **Enable Live Chat** Configuration section and set it to the correct LiveChat setup (Ameyo Fusion, Ameyo Fusion 6x, or Exo LiveChat)



Only the bot admin can see this specific setting. If you don't see this, please raise this to your respective Account or Project Manager.

1. For Ameyo Fusion & Ameyo Fusion 6x:

- Click on the Configure button and set up the required credentials.
- Credentials for Web & WhatsApp are different
- Get these credentials from the CE - Delivery team.



1. After the LiveChat is configured, please test it.
2. Now, to **enable AI Conversation Summary**, it is disabled by default. We need to enable this from the Chatbot Admin panel from the backend.
   1. Search for **Livechatconfigs**
   2. Search and enable **Is chat summary for ameyo fusion enabled**
   3. Update the **Summary max length.** Suggest setting it between 100 and 500 characters

In case you do not have access to this section, drop an email to your respective Account Manager or Project Manager.

The feature will automatically generate summaries for future chatbot-to-agent transfers.

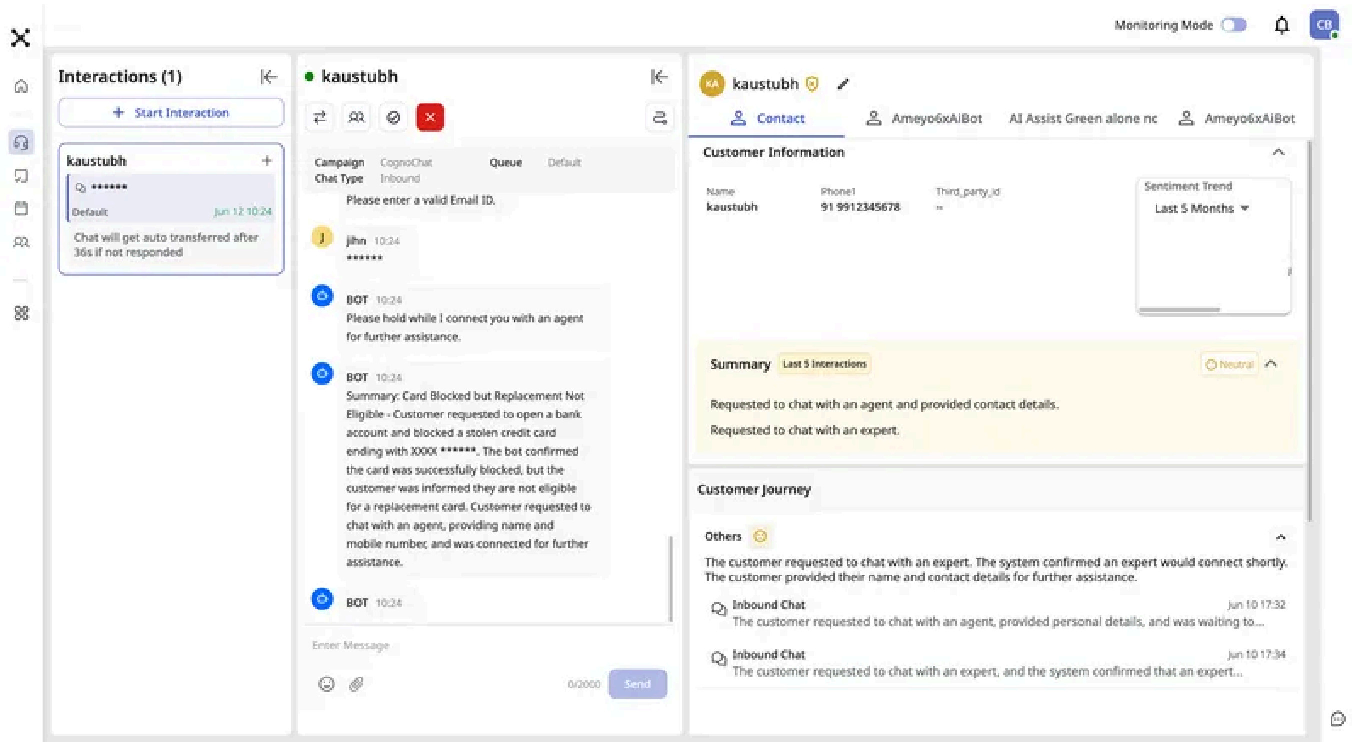
Configuration

- **Enable AI Conversation Summary -** Controls whether AI-generated summaries are created during Live Chat transfers.
- **Summary Length** - Defines the target maximum length of the AI-generated summary.
- **Supported range**: 50-1000 characters.

Note: Actual summary length may vary depending on conversation context.

How Does It Work?

1. Customer interacts with the chatbot.
2. Customer requests a Live Agent or is escalated through the bot flow.
3. The chatbot generates an AI-powered summary of the conversation based on the user & chatbot conversation.
4. The summary is appended to the conversation transcript.
5. LiveChat system retrieves the transcript with the summary.
6. The agent receives the conversation along with the generated summary before handling the customer.



Example

Conversation Summary:

Failed IMPS Transfer - Customer reported a failed IMPS transfer of ₹25,000. The bot verified transaction details and shared the current transaction status. Reference ID TXN874521 was provided during the conversation. As the amount was debited but not credited to the beneficiary account, the customer requested assistance from a live agent.

Limitations

- Summary quality depends on the information available in the conversation.
- The AI may generate shorter summaries if limited context is available.
- The configured summary length acts as a target and may not be strictly followed by the AI model.
- Summaries are generated only during chatbot-to-live-agent transfers.
- The conversation transcript remains the source of truth for agents.

1.3. Chatbot Billable Sessions

Overview

Billable Sessions is a usage metric now available on the platform to provide **visibility into chatbot interactions at a session level**.

This feature enables users to:

- View total billable sessions per bot
- Track session-level interaction data
- Access detailed breakdowns via message history and exports

What is a Billable Session?

A **Billable Session** is a unit of interaction that begins with a **user-initiated message** and represents an active engagement between the user and the chatbot.

It groups all interactions within a defined activity window into a **single session**, which is used for tracking and billing purposes.

Definition and Rules

A new Billable Session is created when any of the following conditions occur:

1. **Inactivity Timeout**
    1. A new session is created if there is **15 minutes of inactivity** from the user.
2. **Conversation Restart**
    1. A new session is triggered when the interaction is restarted, such as:
        1. Page reload or refresh
        2. App reload
        3. Reopening the chatbot
3. **Live Chat Closure**
    1. When a live chat is:

1. Marked as resolved by the agent
2. Ended by the user

This is considered the end of a session, and any new interaction will start a new billable session.

Outbound Campaign Behavior (WhatsApp)

- An outbound campaign message **without any user response** is **not counted** as a billable session.
- A billable session is created **only when the user replies**, and:
  - The bot responds with a flow
  - Or even a default/fallback message

Conversation ID vs Billable Session ID

Conversation ID

- Previously referred to as **Session ID,** now renamed to **Conversation ID** on the console, represents a continuous conversation thread.
- Logic remains unchanged: Valid for 1 day **but differs for channels.**
  - **Website, Android & iOS**: The conversation ends at the night at 12:00 AM IST for every chat.
    - **Example**: Conversation for the Chat initiated at - Day 1, 10:00 AM will end at Day 1, 11:59:59 AM. It can consist of multiple Billable session in this single Conversation.
  - **WhatsApp**: The conversation is active for net 24H from when the first message was sent by the user.
    - **Example**: Conversation for the Chat initiated at Day 1, 3:00PM will end at Day 2, 2:59:59 PM. It can consist of multiple Billable session in this single Conversation.

Billable Session ID

- Represents a individual **billing unit.**
- Group interactions based on activity windows and defined triggers inside a conversation.

Relationship

- A single **Conversation ID can contain multiple Billable Sessions**
- Billable Sessions are **subsets within a conversation**, split based on inactivity or restart conditions

Key Concepts

Concept	Description
Conversation ID	Tracks the overall conversation thread (1-day window)
Billable Session ID	Tracks chargeable interaction windows within a conversation
Session Trigger	Events that create a new billable session (timeout, restart, chat closure)

How It Works (Examples)

Example 1: Continuous Interaction

Time	Action
10:00	User sends message
10:05	User continues interaction
10:05	Bot responds
10:30	User continues interaction

Result:

- 1 Conversation ID
- 1 Billable Session

Example 2: Inactivity Split

Time	Action
10:00	User sends message
10:10	Interaction continues
10:30	User sends new message

Result:

- 1 Conversation ID
- 2 Billable Sessions (due to >15 min inactivity)

Example 3: Page Refresh

Time	Action
10:00	User starts interaction
10:05	User refreshes the page
10:06	User sends a new message

Result:

- 1 Conversation ID
- 2 Billable Sessions (restart triggered)

Example 4: Campaign Interaction

Scenario	Result
Campaign sent, no reply	No session
User replies to campaign	Session starts
Bot responds	Billable session counted

Example 5: Live Chat Closure

Time	Action
10:00	User starts chat
10:05	Agent joins
10:20	Chat resolved
10:21	User sends a message

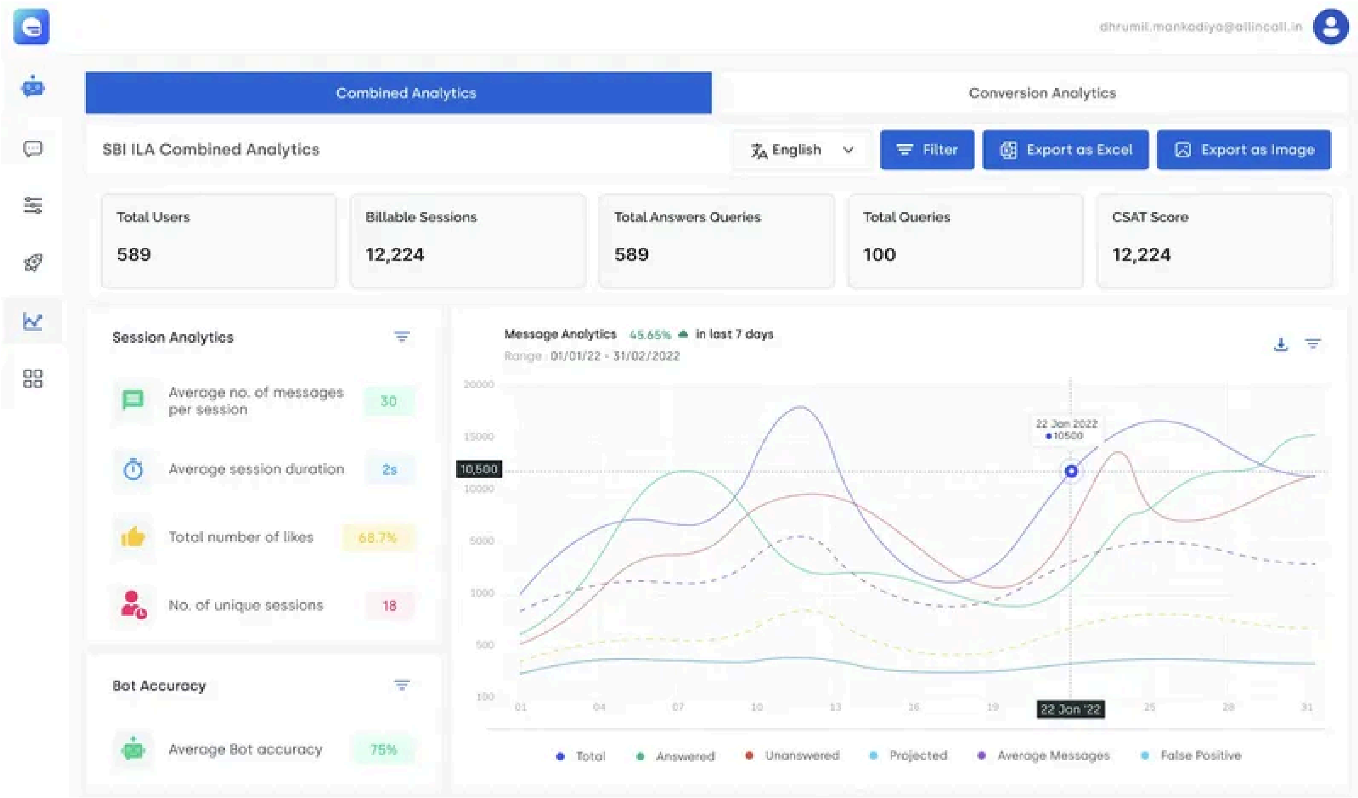
Result:

- 1 Conversation ID
- 2 Billable Sessions (closure triggered)

Where Can You See Billable Sessions?

1. Analytics Dashboard

- Open Chatbot > Analytics > Combined Analytics > On the Usage Bar
- View total **Billable Sessions**
- Available at the bot level for the selected date range



2. Message Histoy

User Chat History

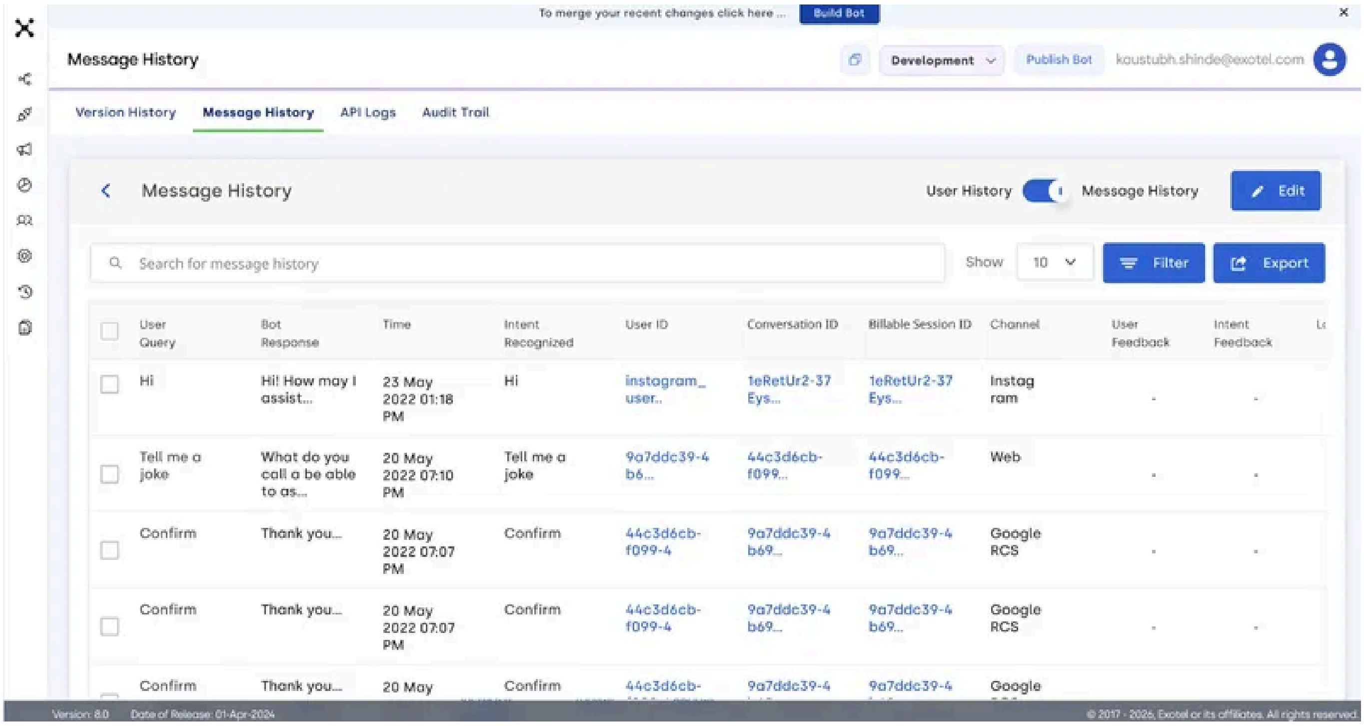
Go to Chatbot > Message History from LHS > Switch to Message History > See the User chat table

Enhanced with:

- **Conversation ID** (renamed)
- **Billable Session ID** (new)

This allows:

- Tracking of user interactions
- Identification of session grouping



Export Reports

- Downloadable message history reports include:
  - Conversation ID
  - Billable Session ID
  - Chat-level data