

# Brand Management Chatbot Builder

Version 1.2

nextiva

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# Chatbot Builder overview

The Chatbot Builder empowers you to create a dynamic chatbot for seamless integration within the Live Chat function. This tool allows customers to engage with a chatbot instead of a live agent, providing a personalized and efficient experience. By customizing responses and inputs, you can shape a seamless interaction that enhances customer satisfaction and increases productivity.

## Logging in

Visit [nextiva.com](https://nextiva.com), and click **Login** at the top. Select **Sign in to NextivaCX**. Enter your Nextiva username and password and click **Sign In**. If you forgot your username or password, [click here](#).

## Creating a Chatbot

Select the **Home** icon from the left toolbar.

Under the **Onboarding** tab, select **Bot Builder > Configure Bot**.

**TIP:** You can also access Chatbots by selecting **Settings > Chatbot Configuration > Create New Chatbot**.

Enter the following information:

- **Name:** Name of the new Chatbot
- **Source:** Source channel the bot will apply.

### Chatbot settings

NAME \*

SOURCE \*

SESSION EXPIRY TIME (IN MINS) \*

CLOSE SESSION ON ERROR

Cancel Next

### Chatbot Workflow Builder

Drag and drop elements from the list into your workspace to create the chatbot workflow.

Add Chatbot Response elements

Formatted Text1 T	Text T
Video 📺	Image With Text 🖼️
Carrousal 📺	Table 📊

- **Session Expiry Time Minutes:** Minutes until chat expires with no response.
- **Close session on error:** Close the chat session.

Click **Next** when done.

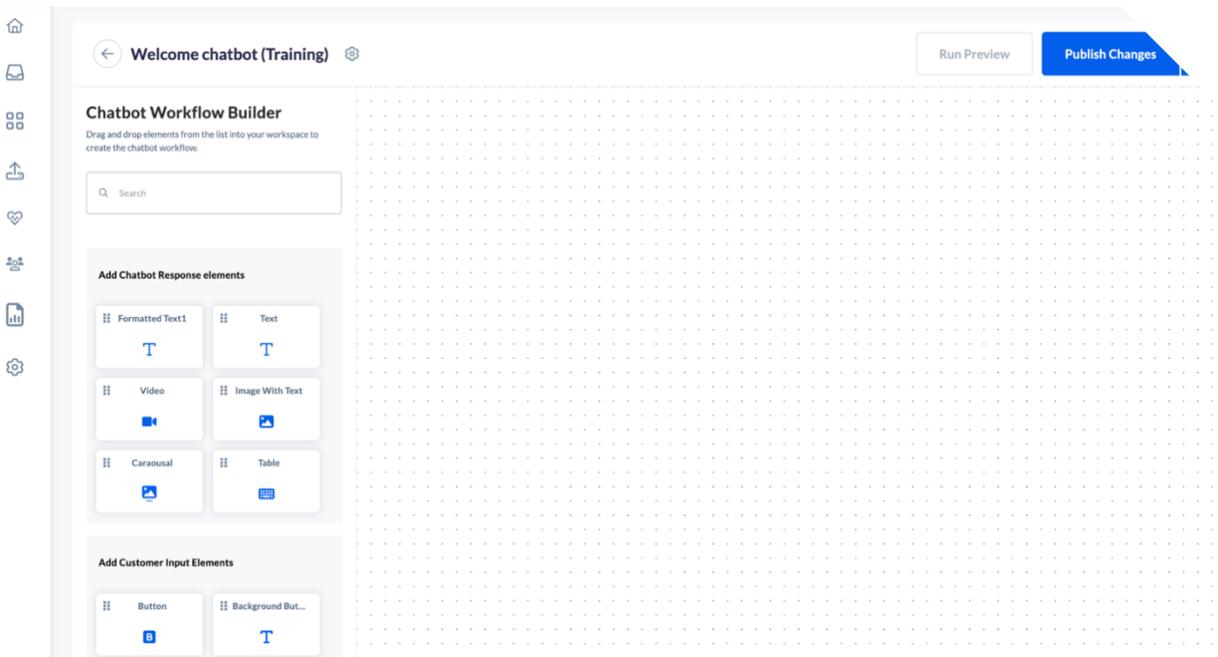
### Chatbot Response Elements

Chatbot Response Elements are specific texts, videos, or messages that the chatbot will display for the customer to engage with.

Click and drag a chatbot response element over to the blank canvas. The chatbot response element is the item that will dictate the type of message shown to a customer.

Once dragged and dropped into the chatbot builder, enter the type of message you would like displayed. Click **Save**.

- **Formatted Text:** Customize how the text appears to the customer.
- **Text:** Write a specific message to the customer. This is a great option to start the conversation.
- **Video:** Upload or embed a video for the customer to view.
- **Image with Text:** Display an image and text.
- **Carousel:** Display multiple images, allowing customers to cycle through by selecting the previous and next buttons.
- **Table:** This is a great way to provide a lot of information at one time.



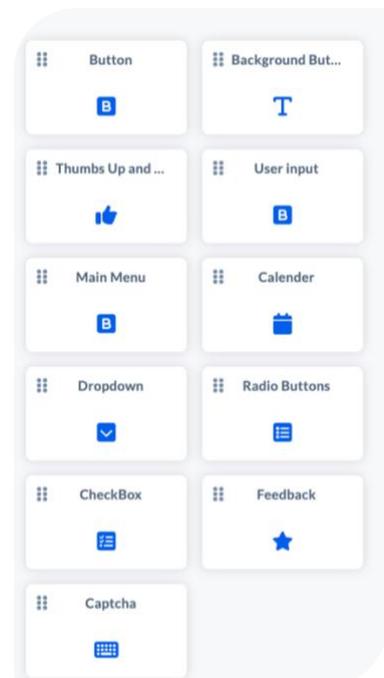
Once the Chatbot Response Element has been added and saved, the node can be edited and renamed, and a chatbot input element can be added.

**TIP:** Click the **Ellipsis** at the top right corner of the node and select **Rename** to help identify the conversation flow.

### Customer Input Elements

Add a customer input response by clicking and dragging it to the created node. The customer input response element dictates how a customer will respond to the message displayed.

- **Button:** The button element allows customers to select an item for assistance and provides multiple response options in a clickable format.
- **Background Button:** The ability to add a specific image to a button. For example, if the chatbot is assisting users with travel planning, the button might showcase a photo of a tropical beach for a "Book Now" option.
- **Thumbs Up and Thumbs Down:** The reaction element allows the customer to respond with a thumbs up and thumbs down icon to express how they are feeling. This is a great tool for quickly gauging sentiment. It can determine if the customer liked or disliked the support they received, directing them accordingly.
- **User Input:** The user input element allows the customer to add text to the chatbot. This allows the customer to provide additional information that can be helpful when transferring to a live agent.
- **Main Menu:** The main menu option routes the customer back to an earlier part of the chatbot flow. This is great if the chat has been resolved and the user would like to give the customer the opportunity to start over.
- **Calendar:** The calendar response allows the customer to select specific dates. This is a great option for customers who want to enter appointment dates or date ranges.
- **Drop Down:** The dropdown element shows the customer a dropdown menu from which they can select items. Multiple dropdown options can be entered for the customer to select from. This is helpful to limit the number of items a customer can select from while still providing many options.
- **Radio Button:** The radio button element allows the customer to select a specific department to communicate with or a specific item they would like assistance with.
- **Checkbox:** The checkbox option allows the customer to select multiple items at once. This is a great option for troubleshooting problems and confirming what tasks the customer has already performed.



- **Feedback:** The feedback element provides the customer with the opportunity to rate their experience. This can be used to rate the interaction or experience the customer had.
- **Captcha:** Captcha is the tool that businesses use to confirm that the customer they are interacting with on the internet is a human and not a bot. Nextiva uses the Google-captcha, which can be added here.

Create a new node based on the responses to the previous node by dragging a new chatbot response element to the canvas.

Once there are multiple nodes, the input options can be connected to another node. To do so, drag from one input response to the new node.

Continue creating a chatbot conversation flow until all interactions are complete.

## Connecting the Chatbot to Live Chat

Now that you have a completed conversation flow, you will need to connect the chatbot to the live chat.

Select **Publish Changes > Publish**. Select the **Home** icon and click **Live Chat > Add Live Chat**.

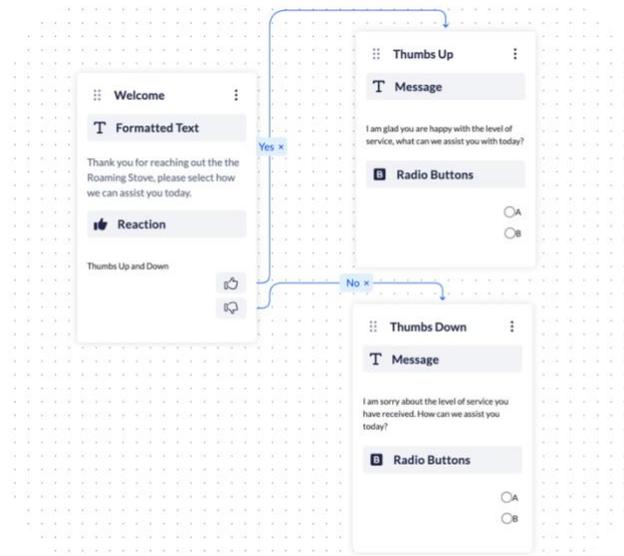
Under **Advanced Options**, select **Chatbot**. Choose the chatbot from the drop-down menu. Click **Save**.

## Responding to chat messages

All chat messages will go to the Unibox, allowing you to instantly view and respond to chat messages. The Unibox manages, monitors, and responds to interactions from all connected channels, including social media, email, chat, reviews, and more.

From the main dashboard, click **Unibox** to view and respond to chat messages. Open the chat message to view all information, including any chatbot history.

Select **Click Here to Start Working on this Case**. The case will then be assigned to you so you can respond. Click **Reply to message** and enter your response.



#EMTE-32 x

Assign to: General Workbasket-Caitlin | Case Status: Ongoing

4 months ago

Hi Welcome  
Thank you for contacting us.  
02:38 PM

Assigned to: General Workbasket | By: First Organizer | 02:38 PM Mon, Jan 15  
Originated by: Caitlin Moore (General Workbasket) | Via: Playmode | 08:59 AM Thu, Feb 15

Exit Playmode

anonymous  
@anonymous

Survey Results

Case History

Case Details

Ticket ID: EMTE-32 | Profile: The Roaming Stove

Case Started: 02:38 PM Mon, Jan 15

Priority: CRITICAL HIGH MEDIUM LOW TRIVIAL

Property: Select Property

Case Form

Reply to message