

The following document outlines how an agency creates and deploys a chatbot on one of their customer's website.



- 1) Go to your account generator page (such as chat.promptchat.com) and create an account for your customer. (Ensure that your customer can verify his/her email address for the newly created account quickly since you will not be able to continue with the account creation process until the email is verified. Otherwise create a gmail address and then you can verify this email address quickly - you can always add your customer's email address at a later date)
- 2) Once the account is created and you log in this newly created customer account you will be presented by a "Plans" page where you can select a plan which your server offers. This is generally an unlimited plan if you do not use the Promptchat system for billing via PayPal.
- 3) Now you are ready to start building the customer's chatbot.
- 4) Start by clicking the "**Calendar Tab**" and create a calendar with your customers opening hours. Make sure you enter the email address where the customer is going to get email notifications when a web visitor uses the chatbot to request a call back or makes an appointment. YOU can make as many calendars as you need each with a different purpose, such as: Request a call back, Schedule a meeting, Book an Appointment etc...
- 5) After the calendar creation, go to the "**Chatbots**" tab and start creating your chatbot. Click "Add" and add a title to this chatbot (best practice is to name it with your client's website or brand name).
- 6) When you are in the chatbot editor, you can simply find the "load from template" button in the bottom left corner of the main menu. Pick a template which you want to use as a starting position in the building process and load it.
- 7) Once the template is loaded, go through every building block and customize these with your new customer's details (content, logos, phone number, calendar etc...)
- 8) When done save it (there is an auto-save function however before exiting you should still click on save. NOW you have a calendar which you used in the chatbot and you have a chatbot with a personalized conversation flow.
- 9) The next thing to do is to create a chatbox for this chatbot and customize it's colours to match the customer's website's look & feel. You do this under the "**Button Settings**" tab. Go through each option in Button settings, upload the customer logo and customize colour schemes.
- 10) After this, Go to the "**Integrations**" tab. And this is the final step prior to installation. Here you will pick the Web block and go through the next step. Here you pick the chatbot you want the chatbox to use, pick the Button configuration you created, Pick the department which will receive live chat notifications when a visitor requests a live chat. Now you are done and you can retrieve the "**Code**" from the final page. Here you can also preview what you did and copy and install the Javascript in the customer's website. Best practice is to install it in the website's footer or if you are using Wordpress there is usually an

area where you can insert external Javascripts. Place it as the last script in the footer, so that it will be the last script to load when visitors arrive to the website.

11) If you are new to this and want to create chatbots for FB Messenger, WhatsApp, SMS, Viber or Telegram contact us at office@promptchat.com for help.