Get Started with BotPenguin

Thank you for starting your digital communication journey with BotPenguin. We look forward to being a part of your growth journey.

What is BotPenguin?

BotPenguin is a chatbot builder software that can automate conversations and streamline the lead-generation process. Our suite of features is well-suited to various applications across businesses, and we hope you find just what you are looking for.

Creating an account on BotPenguin Please follow the below steps to create your account on BotPenguin. Navigate to the BotPenguin Authentication PageOpen your web browser and go to BotPenguin Authentication Page.Create an Account Click on the "Sign Up" button to start the registration process. Fill in Your Details Click on the "Work Email*" field and enter your work email address.Click on the "Phone*" field and enter your phone number. Choose a strong password for yourself. Click the "Sign Up" button to proceed. Verify Your Email Address Login to your email account and locate the verification email from BotPenguin. Open the email and click on the "Verify your email address" link to confirm your email and complete the sign-up process. Notes: Ensure you enter a valid work email and phone number to receive the verification email.If you do not receive the verification email, check your spam or junk folder. Bot Setup PageOnce you are logged in, You’ll be popped to create the bot 1st. This is the 1st step to enter the platform.

Navigate to the specific chatbot you want to make; we have it sorted out. Website Chatbot WhatsApp Chatbot Facebook Chatbot Landing Page Chatbot Make Your Live Chat Chatbot Telegram Chatbot

To create your Website chatbot , you first need to visit the BotPenguin Dashboard: https://app.botpenguin.com/homeTo start creating your new chatbot, click "Create New Bot. "Select the primary purpose for creating your bot and proceed further. Select the platform: “Website Chatbot” You will see a notification: "Bot has been successfully created. ”Your bot has been successfully created. Then you will land up on this page, now you can configure the below mentioned items using the below links: Edit Your Chat Flow Train Your AI Chatbot Install your Chatbot3rd Party Apps Integrations

To create your Landing page chatbot and manage all your chatbots, you first need to visit the BotPenguin Dashboard**:** https://app.botpenguin.com/home

To start creating your new chatbot, click "Create New Bot."Select the primary purpose for creating your bot and proceed further. Select the platform: “Website Chatbot ”You will see a notification: "Bot has been successfully created. ”Select the website chatbot you have created from sidebar. Click on “Install Your Chatbot”. Select the “Landing Page Bot”. Test: To see how your chatbot will function and appear on your Landing page, click on the "Test" button.Copy URL: Click on “Copy URL” and you can share this URL with your users. You have created your Landing Page Chatbot.Embedded ChatbotNow, if you want to add a chatbot to your landing page, click on “Embedded Chatbot” Get Chatbot Installation code: From this section, you can directly copy the script code for your chatbot. Share Installation code: Installation code will be sent directly to your development team via email.Ask BotPenguin Support: Our team will assist you in installing your chatbot.Copy the provided script code and find the HTML file such as the header and paste the code that you copied inside the body tag.Paste the code inside the body tag, then save and deploy your updated code.If everything appears correct but you are still unable to proceed, please contact us at support@botpenguin.com. Our support team is here to assist you with any issues or questions you may have.

Here is the process to create the WhatsApp Bot using the BotPenguin’s Automated onboarding. This document will guide you through the step-by-step process of creating the BotPenguin WhatsApp Bot using the WhatsApp Business Cloud API. Following these instructions, you can set up your WhatsApp Bot and integrate it with the BotPenguin platform. Step 1: Check for Pre-requisites Before you begin, ensure you have the necessary prerequisites in place, such as access to the BotPenguin platform, WhatsApp number, etc.Pre-requisites Before you start creating the WhatsApp bot, Make sure that you haveA phone number that isActive & capable of receiving SMS. Not registered on WhatsApp or WA Business App. Registered legal business An active website with a valid privacy policy Business use case compliant with WhatsApp and Meta commerce policy. A valid payment method (Debit or Credit card) capable of making international payments to Meta for conversation charges. GSTIN Number, Only if the business is registered in India.If you have all of the above checked, You are good to start with WhatsApp Cloud API Bot. Please note that a single mobile number can only be utilized on one of the WhatsApp services at a given time, namely WhatsApp, WA Business, or WhatsApp Business API. If you wish to use your existing number, you must remove your account from one service before using it on another. Step 2: Create a WhatsApp bot & go through the WhatsApp Automated onboarding process2.1 Register your bot on BotPenguin Login to your BotPenguin Portal and Click the "Create Bot" button on the top right. Select "WhatsApp" as the platform on the next page.Choose PlatformProvide the required details and follow the bot creation process. Scan the QR Code and initiate a WhatsApp message to create the demo bot 1st. Scan or Send Confirmation messageUpon successful verification, Click "Connect to your WhatsApp number" to start the Automated onboarding.2.2 Complete Meta Automated onboardingSelect all the pre-requisite and click "Proceed"Choose Automated or Manual onboarding. In this document, We will talking about Automated onboard.It will open up a new pop-up window where you have to complete the Meta onboarding.Please make sure that you have not blocked the pop-up window in your browser, If yes, Please enable the same.Upon successful completion, Your bot will be connected to WhatsApp. But as a last step, You have to update your payment method.Step 3: Update Payment Method to WhatsAppIn the Business Manager, update the payment method for your WhatsApp Business Cloud API account to enable seamless transaction processing.3.1 Access WhatsApp Account SettingsIn the "Meta Business Manager," locate and click on the "Payment Setting" button for your WhatsApp Account.Payment Setting3.2 Navigate to Billing and Payments PageOn the "Billing and Payments" page, click on the "Add Payment Method" option to add a new payment method.Manage Payment Method3.3 Select Payment Method TypeChoose the payment method type that you want to use for your WhatsApp account.Select Payment Method TypePayment3.4 Enter Payment DetailsEnter the necessary payment details based on the selected payment method.Enter Payment DetailsPayment3.5 Verify Payment MethodOnce you have entered the payment details, proceed with the verification process.3.6 Update Business InformationAfter successful verification, make any necessary updates to your business information.You have successfully updated the payment method on your WhatsApp account.Congratulations! You have successfully created the BotPenguin WhatsApp Bot using the WhatsApp Business Cloud API and integrated it with the BotPenguin platform. Your WhatsApp Bot is now ready to interact with users and provide automated responses.Please note that specific steps and requirements may vary based on updates and changes in the BotPenguin and WhatsApp Business Cloud API platforms. If you encounter any difficulties during the process or have further questions, please refer to the official documentation of BotPenguin and WhatsApp Business Cloud API, or contact their support teams for assistance.

Why Instagram Chatbot?Creating an Instagram chatbot offers several benefits that can significantly enhance your online presence and business operations:24/7 Customer Support: You can respond instantly to customer inquiries at any time of the day.Increased Engagement: Chatbots can engage with your audience in real time, sending personalized messages, updates, and promotions.Lead Generation: By interacting with visitors and taking essential information, chatbots can help generate leads, making it easier to convert potential customers into actual customers.Scalability: Unlike human agents, chatbots can handle multiple conversations simultaneously.To create your Instagram chatbot and manage all your chatbots, you first need to visit the BotPenguin Dashboard**:** https://app.botpenguin.com/homeHow to Create Your Instagram Chatbot?Follow these quick steps to create your Instagram chatbot:-To start creating your new chatbot, click "Create New Bot."You can view all the bots you have created in the left sidebar.Select the primary purpose for creating your bot and proceed further.Click on "Instagram Chatbot" to begin creating your chatbot.Click on “Login” and enter your login credentials.Enter your phone number/email address and click “Log in”. If you want to create a new Facebook account, click on “Create New Account”Now, click on “Get Started”.Make sure you have an Instagram account.After logging in with your Instagram account, you’ll see the below screen.Select the Business account to start your Instagram Chatbot and click “Next”.Review your business contact information and complete your remaining details.Click on “Save” to continue further.You have created your Instagram chatbot.

Why Facebook Chatbot?Creating a Facebook chatbot offers several benefits that can significantly enhance your online presence and business operations:24/7 Customer Support: You can respond instantly to customer inquiries at any time of the day.Increased Engagement: Chatbots can engage with your audience in real time, sending personalized messages, updates, and promotions.Lead Generation: By interacting with visitors and taking essential information, chatbots can help generate leads, making it easier to convert potential customers into actual customers.Scalability: Unlike human agents, chatbots can handle multiple conversations simultaneously.To create your Facebook chatbot and manage all your chatbots, you first need to visit the BotPenguin Dashboard: https://app.botpenguin.com/home.How to

Create Your Facebook Chatbot?Follow these quick steps to create your Facebook chatbot:-To start creating your new chatbot, click "Create New Bot."Select the primary purpose for creating your bot and proceed further.Select "Facebook Chatbot" to begin creating your chatbot.Now click on login and connect your facebook account.Enter your phone number/email address and click “Log in”. If you want to create a new Facebook account, click on “Create New Account”Then select your business account which you want botpenguin to access and usse chatbot for. You can opt for all the accounts or select a specific business account only.Then click on "continue".You can check and review BotPenguin’s access request and then click on save to move ahead.After following the steps ahead your facebook bot will be ready to use.You can now edit the flow for your bot. And you can now do customizations accordingly.Your Facebook chatbot is created.If everything appears correct but you are still unable to proceed, please contact us at support@botpenguin.com. Our support team is here to assist you with any issues or questions you may have.

Want to check out a cool video instead?Select the "Telegram Chatbot" at platform selection. Then:a. You will be asked to enter your phone number which is connected with telegram.b. You will receive a ‘Login code‘ in your Telegram account. Enter the Login Codehere and click to login to your Telegram Account.c. You may click to ‘resend‘ code in case you haven‘t received it. If still not received theLogin code, please verify the Telegram mobile number and re-enter it by clicking‘Change number‘.Manually Connect Your BotEnter the Bot name which you want to connect.Enter the Bot user name which you want to connectEnter the Bot Authentication Token recieved on telegram from "BotFather".Click on Connect Bot.Create Your Bota. You may choose an existing Telegram bot to connect with BotPenguin or you can select "manually connect to bot". Then enter :Name of your new botUsername. Username should end with ‘bot‘. example: abc_bot or abcbot.b. Enter the details and click ‘Connect‘ and you will be directed to the dashboard sectionwhere you can ‘Edit your chat flow‘ and ‘Telegram Bot Settings‘.Edit Your Chat Flowa. A chat flow is a structure of messages that determines how a conversation will takeplace between your chatbot and the user. Click on the ‘Edit Your Chat Flow‘ tab tocustomize your chat flow.b. Here, you will find a pre-created template of a chat flow that you can customize as peryour business needs. It is very easy and quick to customize the chat flow. Here is the Quick Guide on How to Edit Your Chat Flow.Telegram AutomationHere you can configure automation settings for your telegram botChat FlowsHere, you can also create multiple chat flows from the ‘Create flow‘ optionby adding the name of the flow. Once a flow is added, it will be listed under ‘Flow name‘.This way you can add any number of flows.Drip CampaignsDrip Campaign is a scheduled and structured flow of messagescreated for customer onboarding journeys. To create one, go to the ‘Drip Campaigns‘ tab and click ‘Create Campaign‘. Here is the Quick Guide on How to Create Drip Campaigns.WidgetsA Widget is a chat interface that can be installed in your website, ads, blogs orany promotional content to route subscribers to your Chatbot. You can create multiplewidgets by following a few easy steps on the BotPenguin dashboard. To create one, goto the ‘Widgets‘ tab in ‘Bot Settings‘ and click ‘Create Widget‘ on the extreme right. Here is the Quick Guide on How to Create a WidgetBroadcastA Broadcast is a chat flow or a message that can be blasted in one click, tothe targeted segment or group of contacts. To create one, go to the ‘Broadcast‘ tab inthe ‘Bot Settings‘ and click the ‘Create New Broadcast‘ on the extreme right.Here is the Tutorial for Creating a Broadcast.If you still have some questions for our team, write to us at contact@botpenguin.com .We will respond back within 48 business hours.

Required information for Creating MS Teams ChatbotTo do MS Teams integration, you will need the following details on your end. Bot IDBot PasswordUpdate the Webhook endpoint in the Bot DetailsCreate and Publish an app for your organizationSteps to complete integrationStep 1: Setup MS Teams Bot Login to the MS Teams using the following URL https://teams.microsoft.com/v2/. If you do not have the MS Teams documentation, Create the one before proceeding.Once logged in, Navigate to the developer portal of MS Teams.Choose the "Tools" tab and click on "Bot Management Option"

On this Page, Locate the "New Bot" option and add the bot by giving it a name. Once the bot is created, Enter the following Webhook endpoint address and click "save" to proceed.
https://api.v7.botpenguin.com/ms-teams/webhook

Navigate to "Client Secrets" and add new and Copy the Provide secret key. Keep this secret key safe.

This will be used while creating the configuration on BotPenguin.
Return to the bot listing page and copy the "Bot ID". Keep this key safe. This will be used while creating the configuration on BotPenguin.
Step 2: Create the MS Teams App Navigate back to the "Apps" tab and click on "New App". Create the new app by providing the name. (e.g BotPenguin)Fill in the basic information of the App.

An example of the same is as follows Short Name - BotPenguin Full name - BotPenguin - The chatbot builder platformShort description- BotPenguin is an omnichannel platform to automate your communications. Long description - BotPenguin is an advanced chatbot platform designed to streamline and enhance conversational experiences for businesses across various industries. With a focus on user-friendly interactions, BotPenguin leverages artificial intelligence and natural language processing to create intelligent chatbots that can efficiently handle customer queries, provide information, and engage in meaningful conversations.Version - 1.0.0Developer or company name - BotPenguinWebsite (must be a valid HTTPS URL) - https://botpenguin.com/Privacy policy- https://botpenguin.com/privacy-policy Terms of use - https://botpenguin.com/terms-and-conditionsApp ID: Same as Bot IDYou can give your own branding to your app or leave as it is.Navigate to the "App Features" tab and add the "Bot". Once the next page opens, choose the relevant bot and assign the following scopes Personal TeamsGroup ChatAlso, Check the following options under what your bot can do.Upload and Download filesNow, Move to the "Publish to Org" tab, and Submit your app for your organization.
Step 3: Approve your app as AdminOpen the Teams admin portal using the following link https://admin.teams.microsoft.com/Locate the "Manage Apps" options under the "Team Apps" Section. Search for your app and click on the same.
Click on the App and Click "Publish"Once you have approved the apps, It takes some time to get listed for your users. Step 4: Save the configuration on BotPenguinNavigate to the BotPenguin Dashboard.Click on "Create new bot" on the top left. Choose MS Teams as the channel. Name your bot and Fill in the Bot ID and Bot Secret (Bot Password) which you copied in 1st step. Once you have updated the same. Your bot will be created. Please reach out to us at contact@botpenguin.com for further assistance.

What is a chat flow?A chat flow is a message structure that determines how a conversation will occur between your chatbot and the user. This is configurable and will look something like as shown in image below1. How to customize the Chat Flow?You can customize any chatbot flow using the available chatbot1.1 To customize your chat flow, click the ’Edit Your Chat Flow’ tab.1.2 Here, you will find a pre-created template of a chat flow that you can customizeas per your business needs. You may even choose to import another template from the Import Template tab on the top-right.2. Tools to edit the Chat FlowIt is very easy and quick to customize the chat flow using the following tools:2.1 ’Add new component’: Click here to see a drop-down list of all the availablecomponents that can be added to the flow, such as asking for the user’s name, email, phone number, or placing a single choice or multiple choice question for visitors to answer. This aids in the generation of user data and leads.2.2 Bar in the lower left corner: It enables you to easily manage the views of the chatflow. To check or edit a specific chat flow component, you can use’fit view’’zoom-in or zoom-out’ options.’delete’ icon, which allows you to delete the entire chat flow and start over.‘lock’ option from where you can lock the chat flow once it’s finished so it doesn’t get edited by accident.2.3 Mini Map on he bottom-right side screen: It informs you about the chatflow position even if it is dislocated beyond the screen.2.4 Line Connector: The chat flow component can be linked together in aflow using ‘line connectors’.2.5 Test Flow: Click the tab to test how the conversation flows between Botand the user.3. Add and Customize the Components:3.1 To edit the chat flow, click on any of the message components, such as thewelcome message, and edit the message with your brand’s name that you wish to appear to your user, and ‘Save’ changes.3.2 There are two ways to add a new component to the flow:a. Either you can use the option ’Add new component’ tab on the top-left.The new component is dropped at the end of the flow.For e.g. you wish to share your website URL with the user. Then go to Add new component tab and click on ‘Web Link’ to add a component at the end of the flow.b. Or you can click on the + blue icon at the end of the flow and add a newcomponent from there. For e.g. you wish to share your website URL with the user. Then go to + blue icon at the end of the flow and click ‘Web Link’ to add a component at the end of the flow.3.3 Once a component is added, it is simple to connect the component to thestructured flow by dragging the line connector from the flow’s component to the newly added component. And there you have it!3.4 Now, you can personalize the message and the data to be shared. You can, forexample, customize the message and URL link to be shared by clicking the component ‘Please contact us at URL’. From the ‘Advanced Options’, you can even change the time delay after which your message appears on the chat flow. Save the changes.3.5 Now, to add the ‘multiple choice questions’ component (an option available onlyfor Website bot, Chatbot page and live Chat), follow the steps:Go to the ‘Add new component’ click on ‘Multiple choice’ tab and a component is added.b. Click on the added component to customize it.c. Customize the messages. Add more options by clicking on + blue button on theextreme right on the bar. Customize the title to provide options and Save changes.3.6 A ’smart question’ component Is used to customize Bot responses to thekeywords entered by the user. To add a ‘smart question’ to the chat flow (an option available only for Website bot, Chatbot page and live Chat), you can follow the steps.a. Go to the ‘Add new component’ click on ‘smart question’ tab and a component isadded.b. Click on the added component to customize it.For example, you can add ‘smart keywords’ like account, a/c, acct, debit etc for asking users, ‘What we can help them with?’.c. This may lead to another set of smart keywords like savings, savings account,savings acct, savings a/c and these set of keywords will lead users to the message relevant for savings account.3.7 A ’Live Chat’ component Is used to transfer the conversation with the user fromthe Bot to the online agent. To add a ‘Live Chat’ to the chat flow (an option available only for Website bot, Chatbot page and live Chat), you can follow the steps.a. Go to the ‘Add new component’ click on ‘Live Chat’ tab and a component isadded.b. Click on the added component to customize the component messages.This way, you can build your chat flow with any number of components.4. End the Chat Flow4.1 To end the flow, go to the last component and on the ‘Go to next message’dropdown, select ‘End chat’ option.4.2 This is mandatory to add ‘end chat’ component at the end of the chat flow elseIt will generate a system error and chat flow may not function properly.That’s it! You are now ready to start a conversation with your user.If everything looks correct and you are still unable to move forward, write to us at contact@botpenguin.com We will respond back within 48 business hours.

With the option to create multiple flows in your website chatbot, you can easily connect different flows using the redirect component. Here’s how to set it up:How to create a trigger flow:Create a New Flow:Select your website bot and navigate to the "Edit Your Chatflow" section.Click on "Create New Flow" (as shown in the screenshot).Now enter the "Flowname" and click on the "Create new flow".Configure this new chat flow . It will appear in the flow list on this page.Set Up Redirect in a Previous Flow:Go to the existing flow where you want to trigger the new flow.Add the "Redirect" chat component (as shown in the screenshot).From the dropdown, select the flow you wish to redirect to.Flow Redirection:Once set, the bot will automatically redirect to the selected flow when the redirect component is triggered within the conversation.This allows you to seamlessly connect multiple flows within one chatbot, enhancing the flexibility of your chat interactions on the website.

There are different chat components which can be used in chat and have different use cases.Some components are used to:Request InformationNote: Flow will not move ahead until the user gives the requested information to the bot. 1. NameIt is used to request "name" as information from the user.Click on "Name" from the Add Chat Component. Then you can customize the name request message from the customize bot message.2. Phone NumberIt is used to request a "phone number" as information from the user.Click on "Phone Number" to add into your flow.Then you can customize the phone number request message from customize bot message. You can also select a specific country code for the same by clicking on the drop down.3. EmailIt is used to request "Email" as information from the user.Click on "Email" to add it in your flow.You can customize the email request message from the customize bot message panel.4. Single ChoiceIt is used to give a single choice selection request from the user.Click on "Single Choice" to add it in your flow.You can customize the message, title for your options and link the next component with them. You can add up to 5 options.5. Multiple ChoiceIt is used to give a multiple choice selection request from the user.Click on "Multiple Choice" to add it in your flow.You can customize the message, title for your options and link the next component with them. You can add up to 5 options.6. Text QuestionsIt is used to request "any answer" as information from the user.Click on "Text Question" to add it in your flow.You can customize the information request message to ask for an answer from the user accordingly.7. File UploadIt is used to request a "file, image or video" as information from the user.Click on "File" to add it in your flow.You can customize the file request message from the right panel.8. IframeIt is used to create an iframe. You can add a text message about iframe you are adding.Paste the URL for the web page. Give a title to the iframe. Add a CTA button on which user can click and can be redirected.Once clicked web page will be opened.9. AppointmentIt is used to book an appointment and slot for users. You can configure the message text and add a message to ask user to input time slot. You can select availability hours start time from the drop down and its end time. User will have open to book in time between availability hours.Select slot intervals according to which later booking will be done and time gap will be made.Select future booking days for which slots will be available to be booked.Then select a third party app to integrate with bot for appointment booking.10. LocationIt is used to request textual location from user. Click on "Location" to add it in your flow.Enter message text to ask for location from user as information.11. Date/TimeIt is used to take Date and Time as an input from user. You can enter a message text to request the same and checkbox to show time selection option.User will get option in calendar to select the date and exact time for that date.12. RatingIt is used to ask user to give rating and share their experience. You can enter a text message for the same and add 5 different options for user experience which can be selected by user.13. RangeIt is used to ask user a range according to the requirements.You can enter a text message for the same.Add a prefix and suffix text to be used in range. Then select the starting point and highest point to be selected in the range. You can also select a step you want to use as gap in the range slider.14. Numeric InputIt is used to take a numerical input from the user. Click on "Number Input" to add it in your flow.You can add a text message to request user to enter a numerical value.15. Smart QuestionIt is used to ask user answer according to which the next chat flow will be decided. You can enter a text message or your question. Then enter keywords based on which next chat component will be selected. You can select smart keyword match type, it can be either exact or the keywords should be present in the answer. You can add multiple smart keywords.16. RedirectIt is used to start a new flow which is created for this same bot. You can enter a text message and select the pre-build chat flow from the drop down.Once the component is triggered, the other selected chatflow will continue in the chat.17. APIIt is used to use a third party integration in chat flow. You can select the API. You can then add text to response code and select the next message. Response Code 200 is for success and 400 is for error.You can also check DEVELOPERS section for more information.Send Information1. MessageIt is used to send the information message to the user. You can add a text message which you want to send as information.2. Image/GIFIt is used to send a GIF or an Image. You can add a text message for your image or GIF. If you want to send a GIF, search with its name in the GIF section.Or you can scroll down and upload an image from your device or URL of the image. 3. VideoIt is used to send a video message in the chat flow. You can enter a text message to be sent along with the video. Add a video link or upload it from your device.Size of the video should not be more than 15 MB4. Web LinkIt is used to send a web link in the chat. You can enter a text message which you want to send along with the link. You have to select the platform from the drop down for which you are adding the link. Also add a title for the link and insert the URL. You can add multiple links. When user clicks on the title they will be redirected on the page.Trigger Actions1. Live ChatIt is used to initiate live chat with your available agent. It will create a live chat request. You can enter a text message that will inform user that request has been triggered. Also by clicking on "Manage Team" you will be redirected to Team’s Section where you can assign roles and manage your team.2. Chat GPTIt is used to trigger AI in chat flow. You can enter the first message that will be sent before starting the AI generated questions.Select the number of queries to be resolved using AI.If query suggestion box is checked. You have to provide up to 3 chat suggestions that will be used initially. After that, ChatGPT will provide query suggestions based on the prompt you will enter.You can also train your AI and the query suggestions and replies will be based on that.3. Assign ChatIt is used to automatically assign live chat request among team members. You can either assign to a team member and then select his/her name.

orYou can assign by department, then select the department and assignment logic will be set to "Round Robin" in which every team member will be automatically assigned a live chat request one by one in a round.You can select not to assign to offline agents and assign to agents only in business hours. 4. If/Else BranchIt is used to make decisions based on user inputs or other conditions and according to that condition is applied and the next component in flow will be sent.By clicking on "Please select a condition" or "Add If/Else Branch".You can select Visitor’s Response, Custom Attribute, Contact Property and Chat Property to apply conditions on.Conditions can be equal, not equal, greater than or less thanThen add a value with which conditions will be comparedYou can click on "+" to add "AND" condition or you can click on "Add OR condition" to add the same.Using go to next messageThis setting is available in every component which helps to connect components and create a flow. You can click on the drop down and select which chat component you want to send after.Using Custom Variables in messageThis setting is available in message under customization settings. Type "/" in message customize box and a drop down

will be shown from which you can select your pre-built variables.
Flow will not move ahead until user gives the requested information to the bot. 1. NameIt is used to request the user’s "name" as information. Click on "Name" under the Add Chat Component. Then, you can customize the name request message in the "Customize Bot Message" section.2. Phone NumberIt is used to request the user’s "phone number" as information. Click on "Phone Number" to add it to your flow. Then, you can customize the phone number request message in the "Customize Bot Message" section. You can also select a specific country code by clicking on the dropdown.3. EmailIt is used to request the user’s "email" as information. Click on "Email" to add it to your flow. You can customize the email request message in the "Customize" panel.4. Single ChoiceIt is used to create a single-choice selection request for the user. Click on "Single Choice" to add it to your flow. You can customize the message, set a title for your options, and link each option to the next component. You can add up to 5 options.5. Multiple ChoiceIt is used to create a multiple-choice selection request for the user. Click on "Multiple Choice" to add it to your flow. You can customize the message, set a title for your options, and link each option to the next component. You can add up to 5 options.6. Text QuestionsIt is used to request "any answer" as information from the user. Click on "Text Question" to add it to your flow. You can customize the information request message to appropriately ask for an answer from the user.7. File UploadIt is used to request "a file, image, or video" as information from the user. Click on "File" to add it to your flow. You can customize the file request message using the left panel.8. Iframe It is used to create an iframe. You can add a text message describing the iframe you are adding. Paste the URL of the web page. Provide a title for the iframe and add a CTA button that users can click to be redirected. Once clicked, the web page will open.9. AppointmentIt is used to book an appointment and time slot for users. You can configure the message text and add a prompt asking the user to input a time slot. Select the start and end time for availability hours from the dropdown. The user will be able to book within these availability hours. Choose the slot intervals, which will determine the time gaps between bookings. Select the future booking days for which slots will be available to book. Finally, choose a third-party app to integrate with the bot for appointment booking.10. LocationIt is used to request a textual location from the user. Click on "Location" to add it to your flow. Enter a message text to ask the user for their location as information.11. Date/TimeIt is used to take the date and time as input from the user. You can enter a message text to request this information and select the checkbox to show the time selection option. The user will be given the option to select a date and the exact time for that date from a calendar.12. RatingIt is used to ask the user to provide a rating and share their experience. You can enter a text message for this request and add 5 different options for user experience that the user can select.13. RangeIt is used to ask the user for a range according to the requirements. You can enter a text message for this request. Add a prefix and suffix text to be used in the range. Then, select the starting point and highest point for the range. You can also choose a step value to set the gap in the range slider.14. Numeric InputIt is used to take a numerical input from the user. Click on "Number Input" to add it to your flow. You can add a text message to request the user to enter a numerical value.15. Smart QuestionIt is used to ask the user a question, based on which the next chat flow will be decided. You can enter a text message or your question. Then, enter keywords based on which the next chat component will be selected. You can select the smart keyword match type, which can be either exact or based on the presence of keywords in the answer. You can add multiple smart keywords.16. RedirectIt is used to start a new flow that has been created for the same bot. You can enter a text message and select the pre-built chat flow from the dropdown. Once the component is triggered, the selected chat flow will continue in the conversation.17. API It is used to integrate a third-party service in the chat flow. You can select the API. Then, add the text for the response code and select the next message. Response Code 200 indicates success, while 400 indicates an error. You can also check the DEVELOPERS section for more information.
1. MessageIt is used to send the information message to the user. Select the "Message" component under send information.You can add a text message which you want to send as information in the customize section.2. Image/GIFIt is used to send a GIF or an Image. You can add a text message for your image or GIF. Select "Image/GIF" from the send information section. Add the text message you want to send along with the image/GIF. To send a GIF, search for it by name in the GIF section. Or you can scroll down and upload an image from your device or paste the URL of the image. 3. VideoIt is used to send a video message in the chat flow. You can enter a text message to be sent along with the video in the customize message menu. You can add a video link or upload it from your device.Size of the video should not be more than 15 MB4. Web LinkIt is used to send a web link in the chat. You can enter a text

message to send along with the link. Select the platform from the dropdown for which you are adding the link. Also, add a title for the link and insert the URL. You can add multiple links. When the user clicks on the title, they will be redirected to the page.
1. Live ChatIt is used to initiate live chat with your available agent. It will create a live chat request. You can enter a text message to inform the user that the request has been triggered. By clicking on "Manage Team," you will be redirected to the Team's Section, where you can assign roles and manage your team.2. Chat GPTIt is used to trigger AI in chat flow. You can enter the first message that will be sent before starting the AI-generated questions. Select the number of queries to be resolved using AI. If the query suggestion box is checked, you must provide up to 3 chat suggestions to be used initially. After that, ChatGPT will provide query suggestions based on the prompt you enter. You can also train your AI, and the query suggestions and replies will be based on that training.3. Assign ChatIt is used to automatically assign live chat request among team members. You can either assign the task to a team member by selecting their name. or You can assign it by department, select the department, and set the assignment logic to "Round Robin," where each team member will be automatically assigned a live chat request one by one in a round. You can choose not to assign tasks to offline agents and assign them only during business hours.

Once you have created your website chatbot, the next step is to deploy it on your website to assist and engage with your customers effectively. This guide will provide comprehensive instructions to help you seamlessly install and integrate your chatbot into your website.Let's first start by understanding what deploying a chatbot means.What does deploying a chatbot on a website mean?Deploying a chatbot on a website means making your chatbot live and available on your site, so customers can interact with it directly. This process involves adding the chatbot to your website, enabling it to assist visitors, answer questions, and provide support in real time.Your chatbot will be live on your website like this:-Let's move ahead with the steps you need to complete before installing your chatbot:Prerequisites for Installing Your ChatbotBefore you begin installing your chatbot, ensure you have completed the following steps:Create Your Website Chatbot: Ensure that your chatbot is fully developed and tested.Complete the "Edit Your Chat Flow" Section: Make sure you have configured your chatbot's conversation flow to handle customer interactions effectively.Once these prerequisites are met, you can proceed with the installation of your chatbot.To manage all your chatbots, you first need to visit the BotPenguin Dashboard**:** https://app.botpenguin.com/homeTo manage your bot, select it from the left sidebar.Now click on "Install Your Chatbot."You can select the platform where you need to deploy your chatbot.Click on "It's Custom Built" to install your chatbot on your website.Website Chatbot: The chatbot is embedded and active on the website interface.Landing Page Bot: The chatbot is embedded and active on the landing page interface.Mobile App Chatbot: The chatbot is embedded and active on the mobile app interface.Embedded Chatbot:Test Your ChatbotTo see how your chatbot will function and appear on your website and landing page, click on the "Test" button and select whether you want to test the Website or Landing Page bot.Now let's move ahead with the installing part.Get Chatbot Installation code: From this section, you can directly copy the script code for your chatbot.Share Installation code: Installation code will be sent directly to your development team via email.Ask BotPenguin Support: Our team will assist you in installing your chatbot.Copy the provided snippet and enter your website URL for verification. Then, click "Verify" to complete the process.Find the HTML file such as the header and paste the code that you copied inside the body tag.Paste the code inside the body tag, then save and deploy your updated code. BotPenguin website bots support all sort of websites. However most common of all is WordPress. Here is how you can integrate chatbots on WordPress websites. Installation Instructions1. Get your bot ready to go-liveBefore you move ahead, Make sure you have completed the following steps. Create your bot on the BotPenguin dashboard. Design your chatflow and other design settings from the bot setup page.Once Done, Go to the BotPenguin setup page and then click on the Install your ChatbotSelect the WordPress and copy the API Code/Key and save it safe with yourself.2. Install the BotPenguin chat plugin from the WordPress plugin centerOnce you have completed the 1st step, Go to the WordPress site admin dashboardFind the WordPress plugin center and search for the BotPenguin in the search box.Once you find the BotPenguin Plugin, Install the same. Upon installation, You will be able to see the Activate option. Click on the activate button to activate the plugin. 3. Paste API Code/key and make the bot liveOnce the BotPenguin plugin is activated, Look for the Tools in the side menu.In the side menu, Under tools, You will find the BotPenguin option.Open the BotPenguin option, and you will see the option to paste the

BotPenguin API code / key which you have copied in 1st step. Paste the API key / Code, and proceed by saving the key. 4. Test your bot nowYou have completed all the heavy lifting. Open your website in private mode (Incognito window) to avoid any cache issues and you will find BotPenguin chatbot on your website.Looking for moreLooking for a new featurein case you have got any feature, you can raise the feature request using the below linkReport a Bugin case you have got any bugs. Report us now, we will fix it asap Got any questions?If you can having any questions, you can look into our repository of FAQs. Most likely, you will find your answer here. If now, write us at contact@botpenguin.comsda

BotPenguin website bots support all sort of websites. However most common of all is custom build. Here is how you can integrate chatbots on custom-build websites. Installation Instructions1. Get your bot ready to go-liveBefore you move ahead, Make sure you have completed the following steps. Create your bot on the BotPenguin dashboard. Design your chatflow and other design settings from the bot setup page.Once Done, Go to the BotPenguin setup page and then click on the Install your ChatbotSelect the Java Script and copy the API Code/Key and save it safe with yourself.2. Paste API Code/key and make the bot liveOnce you have completed the 1st step, Go to the HTML code of your website.Find the HTML file such as header that is available in all the website pages. Paste the API key/code which you copied in the 1st step, and paste it before closing the tag.Save and deploy your new updated code and done! 3. Test your bot nowYou have completed all the heavy lifting. Open your website in private mode (Incognito window) to avoid any cache issues and you will find BotPenguin chatbot on your website.Looking for moreLooking for a new featurein case you have got any feature, you can raise the feature request using the below link   Feature RequestsReport a Bugin case you have got any bugs. Report us now, we will fix it asap Report a bug! Got any questions?If you can having any questions, you can look into our repository of FAQs. Most likely, you will find your answer here. If now, write us at contact@botpenguin.com Frequently asked questions (FAQs)

Once you have built your e-commerce website on Squarespace, you can elevate the user experience with the BotPenguin chatbot.Why Squarespace Chatbot?Creating a Squarespace chatbot offers several benefits that can significantly enhance your online presence and business operations:24/7 Customer Support: You can respond instantly to customer inquiries at any time of the day.Increased Engagement: Chatbots can engage with your audience in real time, sending personalized messages, updates, and promotions.Lead Generation: By interacting with visitors and taking essential information, chatbots can help generate leads, making it easier to convert potential customers into actual customers.Scalability: Unlike human agents, chatbots can handle multiple conversations simultaneously.To create your Squarespace chatbot and manage all your chatbots, you first need to visit the BotPenguin Dashboard**:** https://app.botpenguin.com/homeHow to Create Your Squarespace Chatbot?Follow these quick steps to create your Squarespace chatbot:-To start creating your new chatbot, click "Create New Bot."Select the primary purpose for creating your bot and proceed further.Select the platform: “Website Chatbot”You will see a notification: "Bot has been successfully created.”Your bot has been successfully created.Now you need to deploy this chatbot to your Squarespace website.How to Install a Chatbot on Squarespace?To manage your bot, select it from the left sidebar.Now click on “Install Your Chatbot.”You can select the platform where you need to deploy your chatbot.Click on “Squarespace” to install your chatbot on your Squarespace website.Test Your ChatbotTo see how your chatbot will function and appear on your Squarespace website and landing page, click the "Test" button and select whether you want to test the Website or Landing Page bot.Now let’s move ahead with the installing part.Get Chatbot Installation code: From this section, you can directly copy the script code for your chatbot.Share Installation code: Installation code will be sent directly to your development team via email.Ask BotPenguin Support: Our team will assist you in installing your chatbot.Copy the provided snippet and enter your Squarespace website URL for verification. Then, click “Verify” to complete the process.Now, paste the copied code into your Squarespace website. Here are the quick steps to follow.Go to your Squarespace website and click on “ADD SECTION”Then, click on “ADD BLOCK”Select the “Code” block, to start entering your copied code.Add your copied HTML code here.And you have successfully added your chatbot to your Squarespace website.

Train Your AI ChatbotWith BotPenguin, you can leverage ChatGPT to address user queries effectively. ChatGPT will respond to user questions based on the data you have provided during the training of your AI chatbot.In this guide, you will learn:What is Train Your AI Chatbot?How to train your AI Chatbot?What is Train Your AI Chatbot?"Train Your AI Chatbot" refers to the process of providing your AI chatbot with relevant resources, such as your website, files, Google Sheets, or FAQs. By doing so, you equip your

chatbot with the necessary information to effectively answer user queries. This ensures that the responses are accurate and aligned with the data you have provided. Proper training enhances the chatbot’s ability to assist users, improving overall user satisfaction and efficiency.You can train your Ai chatbot by different methods:WebsiteFile UploadGoogle SheetsFAQsAI Conversational ErrorsOther SourcesYour AI-powered chatbot is now fully equipped to handle and answer all user queries seamlessly!If everything appears correct but you are still unable to proceed, please contact us at support@botpenguin.com. Our support team is here to assist you with any issues or questions you may have.
How to train your AI Chatbot?To manage all your chatbots, you first need to visit the BotPenguin Dashboard**:** https://app.botpenguin.com/homeTo manage your bot, select it from the left sidebar.Click on “Train Your AI Chat Bot” and start training your AI Chat Bot.WebsiteYou can view all the websites you have provided under the Website Panel. You can “Sync” the website or “Delete” the website through Actions.Click on “Add Website” to add a new website on which training can be done.“Enter Your Website URL”, that you want to add.Select the import preference:Scan a full page: This will retrieve entire information from all your web pages.Scan a Single Page: This will retrieve information only from a single web page.Scan only JSON Information: This will retrieve only JSON information.Click “Train” to add this website to train your AI Chat Bot.
How to train your AI Chatbot?To manage all your chatbots, you first need to visit the BotPenguin Dashboard**:** https://app.botpenguin.com/homeTo manage your bot, select it from the left sidebar.Click on “Train Your AI Chat Bot” and start training your AI Chat Bot.File UploadClick on “File Upload” to add the file according to which you want to train your AI Chat Bot.Upload the file from your device.And click on “Train” to train your AI Chat Bot with this file.
How to train your AI Chatbot?To manage all your chatbots, you first need to visit the BotPenguin Dashboard**:** https://app.botpenguin.com/homeTo manage your bot, select it from the left sidebar.Click on “Train Your AI Chat Bot” and start training your AI Chat Bot.Google SheetClick on “Google Sheet” to add the sheet according to which you want to train your AI Chat Bot.Click on “Import Google Sheets”.Add your “Google Sheet URL” and describe the content or purpose of this Google sheet.Click on “Add Google Sheets Link” to add this sheet.
How to train your AI Chatbot?To manage all your chatbots, you first need to visit the BotPenguin Dashboard**:** https://app.botpenguin.com/homeTo manage your bot, select it from the left sidebar.Click on “Train Your AI Chat Bot” and start training your AI Chat Bot.FAQsClick on “FAQs” to add the FAQs according to which you want to train your AI Chat Bot.Click on “Add Category” to add the FAQs category.Add category name and description of this category. Click on “Save” to continue.Your FAQ category has been created.Click on the category name to add the questions to this category.Add your FAQ and answer to it.Click on “Save” to add this FAQ.
How to train your AI Chatbot?To manage all your chatbots, you first need to visit the BotPenguin Dashboard**:** https://app.botpenguin.com/homeTo manage your bot, select it from the left sidebar.Click on “Train Your AI Chat Bot” and start training your AI Chat Bot.Conversation HistoryClick on “Conversation History” to add the conversations according to which you want to train your AI Chat Bot.You need to select the dates, and your AI-powered chatbot will get trained based on that conversation’s history.
How to train your AI Chatbot?To manage all your chatbots, you first need to visit the BotPenguin Dashboard**:** https://app.botpenguin.com/homeTo manage your bot, select it from the left sidebar.Click on “Train Your AI Chat Bot” and start training your AI Chat Bot.Other SourcesYou can connect your Notion Page and your chatbot will retrieve information from it.Similarly you can connect your Google Drive and your chatbot will retrieve information from it.Your AI-powered chatbot is now fully equipped to handle and answer all user queries seamlessly!
Website ChatbotTelegram Chatbot SettingsInstagram Chatbot SettingsFacebook Chatbot SettingsWhatApp Chatbot Settings
Please find below the links of all section in the chatbot settings:

Chat Window CustomizationThese are all the settings you can do to customize your website chatbot if still have queries you can contact us anytime.Click on "Save Changes" to save your customizations.Here you can select the layout and positioning for your landing pageLayoutSelect your chat window style from the given two options.Select a bot icon from the options or upload from your device.Select a landing page theme colour.Select a chat background colour.Select landing page background colour.Select a font style for your chatbot.Click on save changes to upload the changes done.ThemeEnter your bot’s landing page name in "Landing Page Name" box.Enter the heading text you want to display in "Landing Page Header" box.Enter the description text you want to display in "Landing Page Description" box.Toggle ON/OFF to hide logo and text.Toggle ON/OFF to hide chatbot’s header.Upload profile logo for your chatbot page.Add any social media links and icons.And click on "Save Changes" to update all the changes done.Content SectionUnder "Design" customize your bot and click on "Landing Page" to customize the same.Website Chatbot SettingsClick on bots and select a website bot.Click on "Website Chatbot Settings".Customize the landing pageThese are all the settings you can do to customize your website chatbot if still have queries you can contact us anytime.You can select chat window positioning on web.You can select chat window positioning on mobile.You can select chat window size.Click on "Save Changes" to save your customizations.Here you can select the layout and positioning for your landing pageLayoutSelect your chat window style from the given two options.Select a bot icon from the options or upload from your device.Select a chatbot window theme colour.Select a chat background colour.Select a font style for your chatbot.Click on save changes to upload the changes done.ThemeEnter your bot’s name in "Bot Name" box.Enter an inviting catch phrase that will make the user talk to bot in "Call to Action" box.Toggle ON/OFF auto hide call to action. If ON select time in seconds after which it will hide.Toggle ON/OFF to hide CTA Chat Bubble.Select chat bubble background colour from the options.Select chat bubble text colour from the given options.Content SectionUnder "Design" customize your bot and click on "Website Chatbot" to customize the same.Click on bots and select a website bot.Click on "Website Chatbot Settings".

The General Section of the Website Chatbot Settings allows users to customize various aspects of their chatbot’s behaviour, appearance, and functionality. Below is a detailed overview of the available fields and options in this section:
1. Live Chat Request MessageDescription: Customize the message that appears on the chat window immediately after a bot user sends a request for Live Chat.Usage: Enter the desired text in the provided input box to make the message more personalized and engaging.2. Unavailable Agent MessageDescription: Customize the message that appears on the chat window when none of your agents are available for Live Chat with the bot user.Usage: Enter the desired text in the provided input box.3. Live Chat Request Message TitleDescription: Customize the title that appears on the chat window immediately after a bot user sends a request for Live Chat.Usage: Enter the desired title text in the provided input box.4. Bot LanguageDescription: Select the bot’s language from the dropdown menu.Usage: Choose the desired language to match your audience’s preferences.5. Bot Time-ZoneDescription: Select the time-zone for your bot.Usage: Use the dropdown menu to configure the time-zone settings.6. Unavailable Agent Message TitleDescription: Customize the title that appears on the chat window when none of your agents are available for Live Chat with the bot user.Usage: Enter the desired title text in the provided input box.7. Chat RetentionDescription: Select whether you wish to retain bot user’s chats forever on the chat window or only for a browser session.Usage: Choose the preferred option from the dropdown menu.8. Notification SoundsOptions:Notification Sound for Chatbot Icon: Select the sound to play when the chatbot icon is interacted with.Notification Sound for Bot Messages on Platform: Choose the sound for bot messages displayed within the chat window.Notification Sound for Bot Messages: Select the sound for bot messages displayed on external platforms.Sound for Chatbot Icon Appearance: Choose the sound to play when the chatbot icon first appears on the webpage.Usage: Use the provided dropdown menus to select your preferred notification sounds.9. Remove Brand NameDescription: A toggle button that removes the BotPenguin brand name from the chat window.Condition: Available only if you have purchased the White-label plan or add-on.Usage: Enable the toggle button to remove branding.10. Activate/Deactivate BotDescription: A toggle button to activate or deactivate the bot.Usage: Use the toggle button to enable or disable the bot as needed.11. Email Notifications for Unfinished ConversationsDescription: A toggle button to send email notifications even when the bot user hasn’t finished the conversation.Usage: Enable the toggle button to receive such notifications.12. Clear CacheDescription: A button to clear the cache when you edit the bot chat flow or settings. Changes will reflect only after 15 minutes.Usage: Click the button to clear the cache and ensure updated settings are applied.13. Save ChangesDescription: After making the desired changes in the General section, click this button to save all updates.Usage: Ensure all changes are finalized and

reflected in the chatbot’s behavior.By using these settings, you can optimize your chatbot’s performance, user experience, and alignment with your branding requirements.
The Alerts section allows you to configure email notifications for lead interactions with your chatbot. Here’s how you can set it up:Email Subject Field:Enter the subject line for the email notifications. This will be the title of the email you receive when a new lead interacts with the bot.Email Notifications Toggle:Use this toggle to enable or disable email notifications. When enabled, you will receive an email whenever a new lead interacts with the bot.Email Address Field:Add the email addresses where you want to receive notifications.You can add multiple email addresses by typing each one and pressing Enter.Lead Revisit Notifications Toggle:Enable this toggle to receive notifications when a lead revisits and interacts with the bot.For example, if a lead interacts with the bot, leaves, and then returns later, you will receive a notification about their revisit.Save Changes:Click the Save Changes button to apply your settings. Your email notifications will now be active as per your configuration.

The Triggers section allows you to define when the chatbot should appear on the website or mobile screen. Here’s how you can configure it:Timing for Desktop Trigger:Set the delay (in seconds) after which the bot should trigger on the desktop screen.Timing for Mobile Trigger:Set the delay (in seconds) after which the bot should trigger on the mobile screen.Chat Bubble Automatic Opening Behavior:Choose from the following options using the dropdown:Always Open After Specified Time: The bot will trigger automatically based on the timing you’ve set in the fields above.Automatically After Selected Amount of Time: If the bot is opened and then closed by the user, it will reopen automatically after the time specified in this field.Never Open Automatically: The bot will not open automatically. It will only open if the user clicks on it.Disable Trigger Toggles:Use these toggles to disable the bot’s trigger separately for the desktop screen or mobile screen.
The User Access section allows you to manage who can access your chatbot. You can configure access based on devices, IP addresses, specific pages, and countries. Here’s how to set it up:Device Selection:Choose which devices can access the chatbot:Mobile-onlyDesktop-onlyAll devicesBlock IP Addresses:Add IP addresses that you want to block from accessing the chatbot.You can enter multiple IP addresses by adding each one and pressing Enter.Restrict Chatbot on Specific Pages:Specify the URLs of pages where you do not want the chatbot to appear.Add multiple URLs by typing them in and pressing Enter.Country Selection:Select the countries where you want the chatbot to be accessible.Use the dropdown to choose one or multiple countries. The chatbot will only appear to users in the selected regions.Save Changes:Once you’ve configured all the settings, click Save Changes to apply your choices.
The Chat Window section allows you to customize the chat window with which users interact on websites or mobile apps. Below are the configurable fields available in this section:1. Indicative Text for Bot MessageDescription: Add a message to be displayed in the chat window when the bot sends a message.Example: "Hi! How can I assist you today?"2. Live Chat Enable ToggleDescription: Enable this toggle to allow users to opt for the live chat functionality.3. Live Agent Display NameDescription: Specify the name to be displayed alongside messages sent by the live agent.4. Live Agent Button NameDescription: Add a name for the button that will display in the chat window for accessing live chat.5. Live Chat Expiration TimeDescription: Set the time (in seconds) after which a live chat request will expire if not accepted by an agent.6. Live Chat Message ColorsOptions:Primary Color: The main color for live chat messages.Secondary Color: The color for text during a live chat.Unavailable Color: The color to indicate that the live agent is unavailable.7. Restart Chat Button Enable ToggleDescription: Enable this toggle to allow users to restart the chat.8. Restart Chat Button NameDescription: Enter the name of the restart button displayed on the chat window.9. Transfer Chat to WhatsApp ToggleDescription: Enable this toggle to allow users to transfer the chat to WhatsApp.Additional Field: Provide a button name for this functionality.10. Enable Chat Rating Screen ToggleDescription: Enable this toggle to allow users to rate their experience after the chat session ends.Additional Fields:Title: Add a title for the rating screen.Subtitle: Add a subtitle for the rating screen.Close Button Name: Provide the name for the button to close the rating screen.Restart Button Name: Specify the text for the button to restart the chat.Background Image: Upload an image to display as the background of the rating screen.11. Chat Reply Placeholder Text ToggleDescription: Customize the placeholder text in the chat reply box.12. Clear Chat on Page Reload ToggleDescription: Enable this toggle to clear previous chat history if the user reloads the page.13. Enable Ticket System ToggleDescription: Integrate HubSpot to allow users to create

tickets directly from the chatbot.14. Enable Knowledge Base ToggleDescription: Integrate GitBook to display a knowledge base in the chat window.

BotPenguin AIBotPenguin utilizes a combination of ChatGPT, proprietary technology, and specialized training to create custom AI models tailored to your business's unique knowledge and customer service needs.You can feed data to your custom AI model through various sources, including website URLs, content files, and FAQs. This enables BotPenguin to develop AI solutions that deliver exceptional service and support to your customers by leveraging both publicly available information and your business-specific data.Setup ChatGPT and AI SettingsTo integrate ChatGPT into your BotPenguin chatbot and customize its behavior, follow these steps:Step 1: Create Your BotsBegin by creating your chatbots. Once you've completed this step, proceed to the next.Step 2: Chatbot SettingsNavigate to the "AI settings" section inside "Website Chatbot Settings".Step 3: Configure Bot's PersonalityAccess "AI Settings" based on the type of chatbot you're setting up:For website chatbots, it's located under "Website Chatbot Setting."For Facebook, Instagram and Telegram bots, you can find it under "Bot Settings."For WhatsApp bots, head to "WhatsApp Bot Setting."Create PersonaIn these settings, you can define the persona details to:Configure Bot's PersonalityAnswer LengthAnswer Perspective (1st person, 3rd person, etc.)ToneLanguageAnswer FormattingIncluded Sources for ResponseCustom Prompt InstructionsManage Unusual Chat ScenariosMessage for When Bot Can't AnswerMessage for Responding to Inappropriate Language UsagePersona DetailsIn Persona Details enter the persona title, persona description and upload a cover photo for your bot's persona.In Communication Style, enter answer lenght, answer as, tone of bot, language used and answer formating. You can also toggle ON/OFF sources and personalize replies with chat history.If "include sources for response" is ON it will share the source name of the knowledge base.chat sceneriosYou can add a chat scenerio by clicking on "Add Action".In Chat Scenarios, select or add an action which gets triggered based on the user's response.Here you can add a keyword according to which LLM model will identify the chat intent and will give message or flow set by you.You can also toggle ON/OFF to show live chat button when the scenerio is identifiedIn Custom Instructions, add a custom prompt which best defines your bot persona and based on that it will act. Example: "Act as a salesman and use formal tone and be polite and friendly"And finally click on "Update" to save the changes.You can click on "Use Persona" to use it in you chatflow.personaFinally the AI model in your chatflow will work based on the persona set by you.Note : You can decide how many queries/answers to be handled via AI. After that you can continue your chat flow. Available in Customize Bot Message.Step 4: Configure ChatGPT ComponentIntegrate ChatGPT model with your bot for better outputs.You can invoke the ChatGPT component at multiple points in the chatflow as needed.Select a GPT model you want to use after integrating with ChatGPT.Initially it will be set on GPT-3.5 TurboAnd you're done! Whenever the ChatGPT component is invoked, your custom-trained model will provide responses based on the settings and training you've configured, enhancing your chatbot's conversational abilities.

Chat Transfer to WhatsappClick on bots and select a website bot.Click on "Website Chatbot Settings".Click on "Chat Window".You can toggle ON/OFF "Enable Transfer to WhatsApp" button. Once switched ON, user can select to transfer chat to whatsapp.Now while chatting with a Website bot, user can click on three dots and select "Transfer to Whatsapp". As shown belowChat WindowIn the Inbox, a message will be shown indicating that chat has been transferred to whatsapp by the user.Done! You have completed setting up Transfer Chat to WhatsApp Functionality.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Please find below the links of all section in the chatbot settings:GeneralTelegram ProfileAI settings

The General section allows you to configure core interaction settings for your Telegram chatbot. Below are the fields and their functionalities:Session TimeoutDefine the time limit after which the chat session will automatically end if the user does not respond to the bot's messages.Restart Chat KeywordsSpecify keywords to restart the chat. For example, entering "restart" will trigger a new chat session. Multiple keywords can be added.Live Chat ExpirySet a time limit for live chat requests. If no agent accepts the request within this time, the live chat request will expire.Live Chat Request KeywordsAdd keywords to initiate a live chat request. For instance, typing "live agent" will request live agent support.Unavailability MessageCustomize the message shown when live chat support is unavailable. Example: "Live chat is currently unavailable. Sorry for the inconvenience."Completion MessageProvide a message that appears when a chat session concludes. This can include instructions for restarting or requesting live chat again.User Inactivity MessageConfigure a message to prompt the user when there is no activity. Example: "It seems you haven’t responded. Please reply to continue."

The Telegram Profile section provides key information about your bot. This includes:Bot NameDisplays the name of your bot.Bot UsernameShows the unique username associated with your bot.Access TokenProvides the bot’s access token, essential for connecting and managing the bot.

GeneralThe General section allows you to configure core interaction settings for your Instagram chatbot. Below are the fields and their functionalities:Session Timeout Define the time limit after which the chat session will automatically end if the user does not respond to the bot’s messages.Restart Chat Keywords Specify keywords to restart the chat. For example, entering "restart" will trigger a new chat session. Multiple keywords can be added.Live Chat Expiry Set a time limit for live chat requests. If no agent accepts the request within this time, the live chat request will expire.Live Chat Request Keywords Add keywords to initiate a live chat request. For instance, typing "live agent" will request live agent support.Unavailability Message Customize the message shown when live chat support is unavailable. Example: "Live chat is currently unavailable. Sorry for the inconvenience."Completion Message Provide a message that appears when a chat session concludes. This can include instructions for restarting or requesting live chat again.User Inactivity Message Configure a message to prompt the user when there is no activity. Example: "It seems you haven’t responded. Please reply to continue."AI settingsPlease follow this link for the AI settings of the Instagram bot:AI settings

GeneralThe General section allows you to configure core interaction settings for your Facebook chatbot. Below are the fields and their functionalities:Session Timeout Define the time limit after which the chat session will automatically end if the user does not respond to the bot’s messages.Restart Chat Keywords Specify keywords to restart the chat. For example, entering "restart" will trigger a new chat session. Multiple keywords can be added.Live Chat Expiry Set a time limit for live chat requests. If no agent accepts the request within this time, the live chat request will expire.Live Chat Request Keywords Add keywords to initiate a live chat request. For instance, typing "live agent" will request live agent support.Unavailability Message Customize the message shown when live chat support is unavailable. Example: "Live chat is currently unavailable. Sorry for the inconvenience."Completion Message Provide a message that appears when a chat session concludes. This can include instructions for restarting or requesting live chat again.User Inactivity Message Configure a message to prompt the user when there is no activity. Example: "It seems you haven’t responded. Please reply to continue."AI SettingsPlease follow the below page link for AI settings of the Facebook bot.AI settings

Please find below the links of all section in the chatbot settings:GeneralAlertsWhatsApp Profile

The General section allows you to configure core interaction settings for your Whatsapp chatbot. Below are the fields and their functionalities:Session Timeout Define the time limit after which the chat session will automatically end if the user does not respond to the bot’s messages.Restart Chat Keywords Specify keywords to restart the chat. For example, entering "restart" will trigger a new chat session. Multiple keywords can be added.Live Chat Expiry Set a time limit for live chat requests. If no agent accepts the request within this time, the live chat request will expire.Live Chat Request Keywords Add keywords to initiate a live chat request. For instance, typing "live agent" will request live agent support.Unavailability Message Customize the message shown when live chat support is unavailable. Example: "Live chat is currently unavailable. Sorry for the inconvenience."Completion Message Provide a message that appears when a chat session concludes. This can include instructions for restarting or requesting live chat again.User Inactivity Message Configure a message to prompt the user when there is no activity. Example: "It seems you haven’t responded. Please reply to continue."

The Alerts section allows you to configure email notifications for lead interactions with your chatbot. Here’s how you can set it up:Email Subject Field:Enter the subject line for the email notifications. This will be the title of the email you receive when a new lead interacts with the bot.Email Notifications Toggle:Use this toggle to enable or disable email notifications. When enabled, you will receive an email whenever a new lead interacts with the bot.Email Address Field:Add the email addresses where you want to receive notifications.You can add multiple email addresses by typing each one and pressing Enter.Lead Revisit Notifications Toggle:Enable this toggle to receive notifications when a lead revisits and interacts with the bot.For example, if a lead interacts with the bot, leaves, and then returns later, you will receive a notification about their revisit.When to send Lead info Here you can customize that when should the email notification should be triggerd wether: a. Begining of the flow b. 5 minutes later. c. End of the flowSave

Changes:Click the Save Changes button to apply your settings. Your email notifications will now be active as per your configuration.
The WhatsApp Profile section in the BotPenguin platform is divided into two key sections:Phone Number DetailsWhatsApp Public Profile1. Phone Number DetailsThis section provides crucial information about the phone number linked to your WhatsApp bot. Below are the details available:Phone Number: Displays the phone number associated with your bot.Phone Number ID: This ID is generated during the onboarding process on Meta and uniquely identifies your bot's phone number.WABA ID (WhatsApp Business Account ID): A unique identifier for your WhatsApp Business Account, also created during Meta onboarding.Access Token: A unique token that allows your bot to interact with the WhatsApp Business API.Messaging Limit: Indicates the maximum number of messages your bot can send within a specified period.Quality Rating: Reflects the performance of your bot based on user interactions. A higher rating indicates better performance.WhatsApp Business Account Name: The name of your WhatsApp Business Account.Note: Among these details, only the WABA ID and the Access Token are editable and accessible for configuration.2. WhatsApp Public ProfileThis section allows you to manage and customize your bot's public-facing profile on WhatsApp. Here's what you can configure:Profile Picture: Upload and edit the profile picture displayed for your bot.About Text: Provide a short description about your bot or business.Address: Enter or update your company's address.Short Description: Add a brief description of your company or product.Email: Specify an email address for customer inquiries or support.Website URL: Provide the link to your business's website.Category: Choose the category that best describes your business.How to Access the WhatsApp Profile SectionLog in to your BotPenguin account.Navigate to your bot's settings.Select the WhatsApp bot settings option.Click on WhatsApp Profile to view and edit the details.This comprehensive setup ensures that your WhatsApp bot maintains a professional presence and operates seamlessly, meeting both functional and branding requirements.

To setup yours Whatsapp TemplatesStep 1: Navigate to your Whatsapp Bot.Step 2: Click on WhatsApp Automation.Step 3: Select Templates.Step 4: You will get option to select pre-defined Templates. You can either select from chatflow template or message templates.CHATFLOW TEMPLATEStep 5: When you hover your mouse on any of the template you will get option to take a preview or use template.Step 6: While taking a preview you can click on Use Template to directly use it in your chatflow.Step 7: Once clicked on "Use Template" your chatflow template will be ready to be used and edited inside "Edit Your Chat Flow". You can customize it according to your requirements.MESSAGE TEMPLATEStep 8: Click on Message Templates to select a pre-defined template form "Templates Gallery" or create and customize your personalised template by selecting "Your Templates".Step 9: When you hover on any of the pre-defined templates you can either take a preview first or directly click on Use Template.With Regular TemplateStep 10: You can create a new template in Your Template section. By selecting "Create Template".Step 11: Under Create Templates section, enter name/title and category for your template. And also select a language for the same. You can select a type for your template by clicking on the drop down.Step 12: Now to configure your template, select a format for you header from the drop down and enter the header text you want to display to your customer. Or you can select a media file you wish to share, it can be either an image, video or a document.Step 13: Enter the content for your template inside the box named body. You can use {{ }} to create a variable in the body and configure that later.Step 14: Enter the content for Footer that will be displayed in your template.Step 15: You can also add Buttons in your templates. After selecting the type for buttons from the drop down you can configure them as shown below.Step 16: Click on "save as draft" if you want to do changes later and click on "Submit for approval" if your are done creating the template.Step 17: In "Manage Templates" your template will be visible. It will get approved by WhatsApp once submitted for approval.Step 18: Under actions, you have options to copy template id, to delete the template and select a flow for your buttons inside the template.Step 19: Similarly you can configure flows for your template reply using buttons added in it.With Carousel TemplateStep 20: When you select "Carousel" as Template Type. You will get options namely:Step 21: "Bubble Text" in which you can add text for the template and add variable for the same.Step 22: "Carousel Setup" in which you can set up cards and configure their media and add CTA buttonsStep 23: Inside "Bubble Text" you will get a text box in which you can enter your text and can click on "Add Variable" to add a variable inside your text.Step 24: Inside "Carousel Setup" you can select a button type which can be "Call to Action" or "Quick Reply". And accordingly you can fill the following details as asked.Step 25: After that create card for your carousel. Add an image and type something about it.Step 26: Then add a button just below the

card. Which will be functional and clickable.Similarly you can add up to 10 cards for your carousel.Step 28: Then click on "Save as draft" or "Submit for approval".Done! You have created your WhatsApp Template. Now wait for getting it approved by meta.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.
To setup yours Whatsapp CatalogGo to your Whatsapp Bot.Click on WhatsApp Automation.Select Catalog.Click on "Create Catalog" to create a new catalog.Click on "Go to Meta" to create a product catalog on Meta Commerce Manager.Now click on "Add Catalog" to create a catalog.Select a business portfolio from the drop down and enter a name and after that click on "Next".After adding basic info click on "Next" in event tracking.In set permissions you can assign people and then click on "Next".After selecting Manually add your products, click on "Add Products".Add Product details such as images, title, description, web link, price etc. and if required click on "New Item" to add more products.After filling all the details click on "Upload Items" this will create a new product catalog.After that go back to WA Automation Page and select "Connect Catalog to Whatsapp Account". And click on "Go to Meta".After that login to your meta account and click on settings button in the bottom left of the panel.Then click on "All Tools" as shown down below.After that click on "WhatsApp Manager".After that click on "Catalogue" and then select "Choose a Catalogue". This will open a pop up box to select catalog that you want to connect.After selecting the catalog that you wish to connect click on "Connect Catalogue" and your catalog will be connected to your bot.To activate your whatsapp catalog just login with facebook by clicking on "Login with Facebook" under "Activate Whatsapp Catalogue".And finally you can select your catalog by clicking on the drop down which you want to use in your chat flow inside "Edit Your Chat Flow".If everything is correct and you are still unable to move forward, write to us a contact@botpenguin.com. We will respond back within 48 business hours.
To setup yours Whatsapp Flows (forms)Step 1: Navigate to your Whatsapp Bot.Step 2: Click on WhatsApp Automation.Step 3: Select WA Flow (Forms).Step 4: Click on "Manage Whatsapp Flow" to configure WA flows.Step 5: Click on the "Choose Flow" drop down and select your created flow.Step 6: If you want to create a new WA Flow, click the button shown in the box. Step 7: This will redirect you to Whatsapp Manager where you can create a new flow for your WA bot. Under Account tools, click on "Flows" and then click on Get Started.step 8: Now create flow for your whatsapp bot. Enter a name for the flow you are creating.step 9: Then select a category which best suits your flow from the drop down.step 10: Then you can select a template for your flow. You can also see its preview in the right side.You can select a template with or without an endpoint. Then click on create.Step 11: After that, in Manage Flow Response. Enter User Response Variable and select an option in Save to Custom Attribute from the drop down.Step 12: You can click on Add Another Field for adding more flow responses.Step 13: After that click on "Save Flow Response" to create and save the WA Flow (Form).If everything is correct and you are still unable to move forward, write to us atcontact@botpenguin.com. We will respond back within 48 business hours.
What is a Broadcast?A Broadcast is messages campaigns that can be blasted in one click, to the targeted segment or group of subscribers/contacts. You can create the one using the below guideHow to create a Broadcast?To create one, go to the Broadcast tab in the Bot Settings and click the Create New Broadcast on the extreme right.Name your broadcast campaignHere, enter your Broadcast name, select template and whom to send the broadcast from drop down.When you select a template you will be asked to add header media which you can import from your system.Configure your BroadcastOnce you select the template, when "Using Group" is selected in whom to send you will get a new drop down to select or create a group. And if you select "Using CSV" then upload a csv file for the same.Also, select the scheduled date to send the Broadcast, if not to be sent immediately.Click Create Broadcast to save your broadcast and will get listed under Broadcast name.Similarly you can edit and customize your broadcast that are available under "Manager Broadcast".Done! You have created your Broadcast campaign.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

What is a drip campaign?A Drip Campaign is a scheduled and structured flow of messages created for customer onboarding journeys. You can define which messages to be sent or can create the whole onboarding journey using the timeline-based messages and chat flow. It only applies to the new customers starting their conversation with the bot.These drip campaigns can be used for creating a funnel and doing timely communication to your new customer to make them aware, act, and adopt your product

or services.It can be easily created on the BotPenguin dashboard using the guide belowHow to create Drip Campaigns?Select a bot.Now click on Automation settings (here I have selected Whatsapp Automation)Then click on "Drip Campaign". And click on "Create New Drip Campaign".Then you will be redirected to Manage Drip Campaign. Here you can create multiple drip campaigns with scheduled, automated messages to trigger responses from specific user groups.Enter a name for your Drip Campaign.Select "Enrolled Contacts" from the drop down by clicking on the same.Schedule your templatesSelect a template which you want to send first by clicking on the drop down. If you want to create a new template you can click on "Create Template" which will redirect you on template creation page.Then select a time period after which the template will be sent as part of the drip campaign. You can select from Minutes, Hours and Days. Once clicked on create drip campaign the countdown will get started.Note: In every 5 minutes drip campaign cycle will run and check for any scheduled drip if available.Also select a header media for your template by clicking on "Select File".You can add another drip schedule by clicking on the "+" button.Up to 5 can be added.If your template contains variables, you can assign their values by selecting them from the drop down.Also you can add a fallback value if the variable is not found.Explaining Different Enrolled ContactsTypes of Enrolled ContactsAll ContactsPre-defined GroupsContact Enrollment RulesAll ContactsThis includes all the contacts that are available in our inbox section that are available for contacting using whatsapp bot.Pre-defined GroupsSelect a group specific to which you want to send the drip campaign.Select a start date and time for the drip campaign to be started after."Send After" will send your scheduled drip after adding up the time you selected above.Contact Enrollment RulesCustomize the enrollment rules according to which the drip campaign will send the templates to.Add a Contact Attribute by selecting it from the drop down.Then add a relation i.e "is" or "is not" between contact attribute and the value.Add the value to which you want to map and make relation with the contact attribute.Add more rules by clicking on "+" and you can select a between "and" and "or" for your enrollment rules.Finally after completing all the steps click on "Create Drip Campaign" to save and initiate your campaign.Done! You have created your drip campaign. Now, whenever any new user comes up, they will receive communication as per your drip.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.
To setup your Auto-Reply feature for FacebookStep 1: Navigate to your Facebook Bot.Step 2: Click on Bot Automation Settings.Step 3: Select Auto-Reply.Step 4: Toggle ON/OFF Auto-Reply on all post button. If OFF select post on which you want to setup auto reply.Step 5: Configure your Auto-Reply message. Add message content in the box which you want to send once someone comments on the post.Step 6: Now configure flow to be triggered after you get reply on the message sent. Select a flow from the drop down.Step 7: You can also set duration after which Auto-Reply message should be sent from the the drop down as shown below.Step 8: Now click on "Add" to finish setup your auto reply.Done! You have created your Facebook Auto-Reply.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.
What is a Widget?A Widget is a chat interface that can be installed in your website, ads, blogs or any promotional content to route subscribers to your Chatbot. You can create multiple widgets by following a few easy steps on the BotPenguin dashboard.How to Manage a WidgetLogin to you Botpenguin Account.Create or select any social bot. That can be either Whatsapp, Instagram, Facebook or Telegram.Then click on and select a bot and go to automation settings.Then click on Widgets section. Here we have discussed about Whatsapp Widgets. Others also follows almost same procedures.Here you can manage widget settings by configuring:Link Chatbot IconQR CodeLink Click on "link" button to open the drop down and make changes in the widget’s link before sharing.You can edit the pre-populated message which will be sent along with the widget link.Once the text is edited click on "update Widget" and save the changes.Then click on "Copy WA Link" button to share your widget using a link. Once the link is clicked customer will be redirected to chat with your bot.Chatbot IconClick on "Chatbot Icon" to open the drop down and edit the chatbot icon before using it in your website.You can copy the chatbot icon code and paste in your website header. This will install the chatbot icon in your website.You can also edit the Chatbot Icon. You can make changes in Icon size by selecting from the drop down.You can enter a text that will be displayed in the widget icon.You can select a placement and positioning for the widget icon. Select from the options by clicking on the drop down.Click on "Update Widget" to save the changes.QR CodeClick on "QR Code" to open the drop down and edit the pre populated message for your chatbot which will appear after scanning the QR Code.You can click on "Download QR Code" and QR Code will

be downloaded which can be shared and scanned by customers and they will be redirected to chat with your chatbot.You can edit the Pre-populated message which will appear after scanning the QR code by clicking on the "Edit pre-populated message" button. And then click on "Update Widget" to save the changes made.Done! You have created your widget.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com .We will respond back within 48 business hours.
Chat Window CustomizationClick on bots and select a website bot.Click on "Website Chatbot Settings". Under "Design" customize your bot and click on "Website Chatbot" to customize the same.Content Section Enter your bot’s name in "Bot Name" box.Enter an inviting catch phrase that will make the user talk to bot in "Call to Action" box.Toggle ON/OFF auto hide call to action. If ON select time in seconds after which it will hide.Toggle ON/OFF to hide CTA Chat Bubble.Select chat bubble background colour from the options.Select chat bubble text colour from the given options.ThemeSelect your chat window style from the given two options.Select a bot icon from the options or upload from your device.Select a chatbot window theme colour.Select a chat background colour. Select a font style for your chatbot.Click on save changes to upload the changes done.LayoutHere you can select the layout and positioning for your landing pageYou can select chat window positioning on web.You can select chat window positioning on mobile.You can select chat window size.Click on "Save Changes" to save your customizations.These are all the settings you can do to customize your website chatbot if still have queries you can contact us anytime.

BotPenguin gives you the power to validate the email entered in the chat. You can enable it in the edit your chat flow options by clicking on the message which is asking for E-mails.You can set it up to either check for the basic format i.e., abc@example.com, or for a particular domain. For example, if you only want customers to come from BotPenguin, you can add a filter setting as include specific domains, botpenguin.com.

Customize the landing pageClick on bots and select a website bot.Click on "Website Chatbot Settings". Under "Design" customize your bot and click on "Landing Page" to customize the same.Content Section Enter your bot’s landing page name in "Landing Page Name" box.Enter the heading text you want to display in "Landing Page Header" box.Enter the description text you want to display in "Landing Page Description" box.Toggle ON/OFF to hide logo and text.Toggle ON/OFF to hide chatbot’s header.Upload profile logo for your chatbot page.Add any social media links and icons.And click on "Save Changes" to update all the changes done.ThemeSelect your chat window style from the given two options.Select a bot icon from the options or upload from your device.Select a landing page theme colour.Select a chat background colour. Select landing page background colour.Select a font style for your chatbot.Click on save changes to upload the changes done.LayoutHere you can select the layout and positioning for your landing pageClick on "Save Changes" to save your customizations.These are all the settings you can do to customize your website chatbot if still have queries you can contact us anytime.

Chat Transfer to WhatsappClick on bots and select a website bot.Click on "Website Chatbot Settings". Click on "Chat Window". You can toggle ON/OFF "Enable Transfer to WhatsApp" button. Once switched ON, user can select to transfer chat to whatsapp.Now while chatting with a Website bot, user can click on three dots and select "Transfer to Whatsapp". As shown belowIn the Inbox, a message will be shown indicating that chat has been transferred to whatsapp by the user.Done! You have completed setting up Transfer Chat to WhatsApp Functionality.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

BotPenguin AI BotPenguin utilizes a combination of ChatGPT, proprietary technology, and specialized training to create custom AI models tailored to your business’s unique knowledge and customer service needs.You can feed data to your custom AI model through various sources, including website URLs, content files, and FAQs. This enables BotPenguin to develop AI solutions that deliver exceptional service and support to your customers by leveraging both publicly available information and your business-specific data.Setup ChatGPT and AI Settings To integrate ChatGPT into your BotPenguin chatbot and customize its behavior, follow these steps:Step 1: Create Your BotsBegin by creating your chatbots. Once you’ve completed this step, proceed to the next.Step 2: Chatbot SettingsNavigate to the "AI settings" section inside "Website Chatbot Settings".Step 3: Configure Bot’s PersonalityAccess "AI Settings" based on the type of chatbot you’re setting up:For website chatbots, it’s located under "Website Chatbot Setting."For Facebook, Instagram and Telegram bots, you can find it under "Bot Settings."For WhatsApp bots, head to "WhatsApp Bot Setting."In these settings, you can define the persona details to:Configure Bot’s PersonalityAnswer LengthAnswer Perspective (1st person, 3rd person,

etc.)ToneLanguageAnswer FormattingIncluded Sources for ResponseCustom Prompt InstructionsManage Unusual Chat ScenariosMessage for When Bot Can’t AnswerMessage for Responding to Inappropriate Language UsageIn Persona Details enter the persona title, persona description and upload a cover photo for your bot’s persona.In Communication Style, enter answer lenght, answer as, tone of bot, language used and answer formating. You can also toggle ON/OFF sources and personalize replies with chat history.If "include sources for response" is ON it will share the source name of the knowledge base. You can add a chat scenerio by clicking on "Add Action". In Chat Scenarios, select or add an action which gets triggered based on the user’s response. Here you can add a keyword according to which LLM model will identify the chat intent and will give message or flow set by you.You can also toggle ON/OFF to show live chat button when the scenerio is identifiedIn Custom Instructions, add a custom prompt which best defines your bot persona and based on that it will act. Example: "Act as a salesman and use formal tone and be polite and friendly"And finally click on "Update" to save the changes.You can click on "Use Persona" to use it in you chatflow.Finally the AI model in your chatflow will work based on the persona set by you.Note : You can decide how many queries/answers to be handled via AI. After that you can continue your chat flow. Available in Customize Bot Message. Step 4: Configure ChatGPT ComponentIntegrate ChatGPT model with your bot for better outputs.You can invoke the ChatGPT component at multiple points in the chatflow as needed.Now select a GPT model from the drop down after integrating ChatGPT.Initially it will be set for GPT-3.5 TurboAnd you’re done! Whenever the ChatGPT component is invoked, your custom-trained model will provide responses based on the settings and training you’ve configured, enhancing your chatbot’s conversational abilities.
To install the WhatsApp Widget on your WordPress website , please follow below steps:Step 1: Access Your Bot Dashboard:Log in to your BotPenguin account.Navigate to the dashboard where your bots are listed.Step 2: Go to WhatsApp Bot Settings:Locate and select the WhatsApp bot for which you want to integrate with WordPress.Access the settings menu for the selected WhatsApp bot.Step 3: Find the Widgets Section:Within the WhatsApp bot settings, look for the "Widgets" section.This section contains options for embedding your bot on different platforms.Step 4: Get the Script Code:In the Widgets section, you’ll find a script code provided specifically for integrating your bot with a WordPress site.Copy the script code to your clipboard.Step 5: Access Your WordPress Admin Panel:Log in to your WordPress website’s admin panel.This is where you manage your WordPress site’s settings and content.Step 6: Navigate to the Theme Editor or Header Section:In the WordPress dashboard, locate the theme editor or header section.This is where you can add custom code to your WordPress site.Step 7: Paste the Script Code:Once you’re in the theme editor or header section, paste the script code you copied from the BotPenguin dashboard.This script code will embed your WhatsApp bot into the header of your WordPress site.Step 8: Save Your Changes:After pasting the script code, save the changes you made to the theme or header section of your WordPress site.This ensures that the changes take effect and your bot is properly integrated.That’s it! You’ve successfully integrated your WhatsApp bot with your WordPress site. Visitors can now engage with your bot seamlessly while browsing your website.
Streamline your workflowBotPenguin has 55+ Integration to automate your workflow for you. BotPenguin integration capabilities allow you to seamlessly transfer your lead, appointments, ticket, and task data to the 3rd party apps. You can integrate 3rd party apps with BotPenguin in two ways. Use available Native integrationsHave the APIs ready! Create your custom integration with BotPenguin My Integration capabilities. Why BotPenguin Integrations?BotPenguin bots work as a front-end app for your end customers, and it collects data in the form of the customer chat and other necessary data such as on which page they were, their indicative location (fetched from IP address), device, browser, etc. All this data is available on the BotPenguin dashboard. However, You may need the same data in any of the other apps that you might be using, such as CRMsScheduling software Task/ticket management tools etcBotPenguin integrations enable you to use these integrations to send the metadata to your apps. How to integrate 3rd party apps with BotPenguin?Once you have decided which app you want to send your data to, Here is how you can integrate it. BotPenguin Integration with Available AppsLog in to the BotPenguin dashboard using the link https://app.botpenguin.com/.Navigate your bot and find the 3rd Party Apps Integrations option on the dashboard. Once you find the list of all integrations available, search for the desired integrations. Once you find your integrations in the list, click on the connect button and follow the on-screen steps. If You are facing issues with the integration, You can look for detailed integration tutorials using the link below.BotPenguin IntegrationsCouldn’t find the desired App! Build your custom IntegrationIf the app you are looking for is unavailable on the app list, You can build your

integration. It is no code and is very simple to build. Below is the link to howCreate your custom integration or My IntegrationsHaving Questions?If you have any questions, you can refer to the below link or contact us at contact@botpenguin.com

Integrate ChatGPTStep 1 of 4: Log in to your BotPenguin Account and Select ChatGPT Integrationa. Login to your BotPenguin account. Then, select and click the Bot you want to integrate with ChatGPT. Click on the 'Integrate tab.'b. The Integrate Window Will Open up. Select the 'All Integrations' Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Find ChatGPT by-Either by scrolling down the list orby typing 'ChatGPT' in the Search Box with the placeholder "Search Integration By Name"e. Click On The 'Purchase' Button As Shownf. An interest form, as shown below, will open up. You will be asked to enter the details we require to contact you. Our customer success will explain the process and our payment plans.g. Once done, the added feature will reflect in your account and the option to configure. Click on configure.h. API key page, as shown below, would open. Add your API Key Token here.Step 2 of 4: Find your Authorization Key/Token in App Accounta. To get the API Token, log in to the Open AI account, and on the main dashboard, click on the dropdown button next to your profile name in the top-right corner and then click on the 'View API Keys' Option.b. Click the Create new secret key option on the API keys page.c. A pop-up opens, as shown below. From the pop-up, copy your secret key.Step 3 of 4: Enter the API key in BotPenguin to Connect with ChatGPTa. Enter the secret key, and press Authenticate, to complete the integration of BotPenguin with ChatGPT.b. If you have entered all the details correctly, you will see a notification that says, "Now you can access the ChatGPT component in chat flow." c. Also, your ChatGPT integration will reflect the message Installed in the Integration List.Step 4 of 4: Test your Integration Setup with DataOnce you have established a connection between BotPenguin and ChatGPT, you are ready for your first NLP-enabled customer interaction. You can test your integration setup by creating a dummy lead on the bot. Still Not Working, Let's Troubleshoot!If you are getting blank responses or undesired responses :Wrong Authorization Details added- You will be required to check and see if all the authorization credentials, such as API Token, API key, and/or URL, have been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin or ChatGPT, as integration works only in the paid plan.Training Data- The training data you provided was ineffective or inept.If everything is correct and you cannot move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Once you have decided which app you want to send your data to, Here is how you can integrate it. BotPenguin Integration with Available AppsLog in to the BotPenguin dashboard using the link https://app.botpenguin.com/.Navigate your bot and find the 3rd Party Apps Integrations option on the dashboard. Once you find the list of all integrations available, search for the desired integrations. Once you find your integrations in the list, click on the connect button and follow the on-screen steps. If You are facing issues with the integration, You can look for detailed integration tutorials.

PrerequisitesEnable custom app uploading in Teams.Ensure that your app is running and accessible using HTTPs.Upload BotPenguinDepending on how you configured your app's scope, you can sideload your app to a team, chat, meeting, or personal use.Log in to the Teams client with your Microsoft 365 development account.Select Apps > Manage your apps and Upload an app.

Select Upload a custom appSelect your BotPenguin package .zip file.Add your app to Teams as per your requirement:a. Select Add to add your personal app.

b. Use the dropdown menu to add your app to a Team or chat. Troubleshoot If your app fails to sideload or encounters any issues with uploading, check the following options:Ensure that you've followed all the instructions for creating your app package.Contact us for any queries or problems.

PrerequisitesHaving a WhatsApp ChatbotHaving a WooCommerce Web StoreStep 1 of 4: Log in to your BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the WhatsApp chatbot you want to integrate with WooCommerce. Click on the 'Integrate tab.b. The Integrate Window Will Open up. Select the 'All Integrations' Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find "WooCommerce" by-Either by scrolling down the list orby typing 'WooCommerce' in the Search Box with the placeholder "Search Integration By Name"e. Now click on the 'Edit' button as shownf. An interface, as shown below, will open up. Please select the option to create a configuration.Step 2 of 4: Find your Webhooks Settings in WooCommerce AccountOnce you are logged into your WooCommerce account, follow the steps below:Advanced > Webhooks   Add a webhook > Select event> order created / order updated / order deletedAdd API URL https://api.v7.botpenguin.com/whatsapp/woo-commerce/{{ phoneNumberId}}Note: The API URL is the same as the Delivery URLNote: You need to create a separate webhook for every information you want your chatbot to fetch. For example, for orders created, orders updated, and orders deleted, there are three separate webhooks. If you want to configure all of them, you should add the same in woo-commerce. In BotPenguin, you can have separate configurations for orders updated with different statuses and one for orders created and orders deleted.Step 2.2 of 4: Find your Phone Number ID in BotPenguinGo to your desired WhatsApp chatbotClick on Bot SettingsClick on WhatsApp ProfileFind the phone number ID field, and copy and paste it inside the WooCommerce webhook settings.Step 3 of 4: Edit the integration configurations in BotPenguinIn the WooCommerce integration Edit settingsa. Click on Create an eventb. Select an eventc. Select the template for the event, then save the change“Connected Successfully.”Step 4 of 4: Test your Integration Setup with DataOnce you have established a connection between BotPenguin and the WooCommerce website, you are ready for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the WhatsApp chatbot sent messages.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 4: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Capsule CRM. Click on the ‘Integrate tab.’b. The Integrate Window Will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Capsule CRM by:-Either by scrolling down the list or,by typing ‘Capsule’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enter the APIToken that you will get by logging into your Capsule account.Step 2 of 4: Find your Authorization Key/Token in App Accounta. To get the API Token, login to the Capsule CRM account and on the main dashboard,click on the dropdown button next to your profile name on the top-right corner and thenclick on ‘Account Setting’ tab.b. Click on Integrationsc. On the ‘Integrations’ page, scroll down to the bottom to locate ‘Develop your own usingthe Capsule API’ and click on ‘user preferences’ to find out your API Token.d. Copy your API Token keyStep 3 of 4: Enter Authorization Details and establish connection with your Appa. Enter Capsule API Token and click the ‘Connect’ Button to complete integration ofBotPenguin with Capsule CRM.b. If you have entered all the details correctly, you will see a notification that says,“Connected Successfully.” That’s all, it’s done!c. Also, your Capsule CRM integration will show the message Installed in the IntegrationList.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Capsule CRM, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Capsule you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to Capsule, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Elevio CRM. Click on the ‘Integrate tab.’b. The Integrate Window Will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Elevio CRM by:-Either by scrolling down the list or,by typing ‘Elevio’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enterAPi KeyAccess Tokenthat you will get by logging into your Elevio account.Step 2 of 5: Find your Authorization Key/Token in App Accounta. To get the APi Key and Access Token, login to the Elevio account. On the bottom leftb. Scroll down the page . In case there is no APi Key listed, you can click on ‘Create APIKey’ tab to create one. Enter a ‘Description’ e.g. ‘New Api Key’ or ‘APi Key forBotPenguin’.c. Click on one of the option and ‘Generate APi Key’d. Your APi Key label will be listed at the bottom of the page. Click on ‘View Key & Token’and copy your Elevio APi Key and Access

Token.Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter Elevio APi key and Access Token, and click the ‘Connect’ Button to completeintegration of BotPenguin with Elevio CRM.b. If you have entered all the details correctly, you will see a notification that says,“Integrated Successfully.”Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and Elevio is established, you needto map parameters (fields) of Elevio to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user’s response fromBotPenguin to the Elevio’s Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Elevio fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,“Mapping successfully.c. Also, your Elevio CRM integration will show the message Installed in the IntegrationList.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Elevio, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Elevio you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to Elevio, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and CRM parameter is either incorrect or you haven’t added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Close CRM. Click on the ‘Integrate tab.’b. The Integrate Window Will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Close CRM by:-Either by scrolling down the list or,by typing ‘Close’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enter APi Tokenthat you will get by logging into your Close account.Step 2 of 5: Find your Authorization Key/Token in App Accounta. To get the API key, login to your Close CRM account. On the left side of the dashboard,scroll down and go to Settings>API Keys.b. Note your APi Key if listed else you may click ‘New API Key’ to create one.c. Enter the API Key Name/Label and click ‘Create API Key’.d. Your new API Key will be generated and listed on the dashboard under API Keys name.Copy the APi KeyStep 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter Close CRM APi key, and click the ‘Connect’ Button to complete integration ofBotPenguin.b. If you have entered all the details correctly, you will see a notification that says,“Integrated Successfully.”Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and Close CRM is established, you needto map parameters (fields) of Close CRM to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user’s response fromBotPenguin to the Close CRM’s Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Close CRM fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. Select the ‘Lead ID’c. If you have entered all the details correctly, you will see a notification that says,“Mapping successfully.”d. Also, your Close integration will show the message Installed in the Integration List.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Close CRM, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Close CRM that you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to Close CRM, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up -

Your mapping with BotPenguin Question and CRM parameter is either incorrect or you haven't added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith CalendarHero. Click on the 'Integrate tab.'b. The Integrate Window Will Open up. Select the 'All Integrations' Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find CalendarHero by:-Either by scrolling down the list or,by typing 'CalendarHero' in the Search Box with the placeholder "Search Integration By Name"e. Now Click On The 'Connect' Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enter the APIToken that you will get by logging into your CalendarHero account.Step 2 of 5: Find your Authorization Key/Token in App Accounta. To get the API Token, login to the CalendarHero account after verification and on themain dashboard, click the 'My Account' tab on the top right corner.b. Go to 'My Profile Settings'c. Switch to 'API' tab to locate your API Token. Copy it to clipboard.Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter CalendarHero API Token and click the 'Connect' Button to complete integration ofBotPenguin with CalenderHero.b. If you have entered all the details correctly, you will see a notification that says,"Integrated Successfully."Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and CalendarHero is established, you needto map parameters (fields) of CalendarHero to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user's response fromBotPenguin to the CalendarHero's Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to CalendatHero fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,"Mapping successfully.c. Also, your CalendarHero integration will show the message Installed in the IntegrationList.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and CalendarHero, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the CalendarHero you have integrated.Still Not Working, Let's Troubleshoot!If you are not getting dummy lead from your Bot to CalendarHero, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and CRM parameter is either incorrect or you haven't added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Extraaedge CRM. Click on the 'Integrate tab.'b. The Integrate Window Will Open up. Select the 'All Integrations' Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Extraaedge CRM by:-Either by scrolling down the list or,by typing 'Extraaedge' in the Search Box with the placeholder "Search Integration By Name"e. Now Click On The 'Connect' Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enterAuthorization TokenSourcethat you will get by logging into your Extraaedge account.Step 2 of 5: Find your Authorization Key/Token in App AccountTo get the Authorization Token, go to extraaedge.com and request them for Demo setup after submitting your details. Extraaedge will mail you the Demo Setup and provide the Authorization Token and Source for integration set up..Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter Extraaedge Authorization Token and Source, and click the 'Connect' Button tocomplete integration of BotPenguin with Extraaedge CRM.b. If you have entered all the details correctly, you will see a notification that says,"Integrated Successfully."Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and Extraaedge is established, you needto map parameters (fields) of Extraaedge to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user's response fromBotPenguin to the Extraaedge's Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Extraaedge fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,"Mapping successfully.c. Also, your Extraaedge CRM integration will show the message Installed in theIntegration List.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Extraaedge, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Extraaedge you have integrated.Still Not Working, Let's Troubleshoot!If you are not getting dummy lead from your Bot to Extraaedge, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and App parameter is either incorrect or you haven't added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Infobip CRM. Click on the 'Integrate tab.'b. The Integrate Window Will Open up. Select the 'All Integrations' Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Infobip CRM by:-Either by scrolling down the list or,by typing 'Infobip CRM' in the Search Box with the placeholder "Search Integration By Name"e. Now Click On The 'Connect' Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enter the APi keythat you will get by logging into your Infobip CRM account.Step 2 of 5: Find your Authorization Key/Token in App AccountTo get the API key, login to the Infobip CRM admin account and on Infobip homepage,you will locate API Key that you can copy.Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter Infobip CRM APi key and click the 'Connect' Button to complete integration ofBotPenguin with Infobip CRM.b. If you have entered all the details correctly, you will see a notification that says,"Integrated Successfully."Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and Infobip is established, you needto map parameters (fields) of Infobip to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user's response fromBotPenguin to the Infobip's Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Infobip fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,"Mapping successfully.c. Also, your Infobip CRM integration will show the message Installed in the IntegrationList.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Infobip, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Infobip you have integrated.Still Not Working, Let's Troubleshoot!If you are not getting dummy lead from your Bot to Infobip, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and App parameter is either incorrect or you haven't added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 4: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Google Sheets. Click on the 'Integrate tab.'b. The Integrate Window Will Open up. Select the 'All Integrations' Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Google Sheets by:-Either by scrolling down the list or,by typing ‘Google Sheets’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. As you connect, an Interface, as shown below, will open up. To complete the process,you just need to Sign In with your Google account.Step 2 of 4: Establish connection with your Appa. After you click the “Sign In With Google” button, It will redirect you to a Google loginwindow. Here, fill out your account credentials and sign in.b. Now, click allow for BotPenguin to access your Google account.c. After you click allow, the connection between BotPenguin and Google Sheets isestablished,and you will be redirected back to Botpenguin.Step 3 of 4: Set up Mapping Parametersa. Now, as connection of the BotPenguin and Google Sheets is established, you needto map parameters (fields) of Google Sheets to the user response of the BotPenguin question.Title will be the Title of the worksheet spreadsheet that you wish to create and then parameters to be addedYou can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user’s response fromBotPenguin to the Google Sheet’s Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Google Sheets fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,“Mapping successfully.c. You are free to change your associated Google Account. You can disconnect first fromthe ‘Disconnect’ tab and then reconnect Google Sheets i.e Step 1 . You may also use the ‘Pause’ tab to pause the integration till the time you want your Bot to capture data/leads in Google Sheets.d. Also, your Google Sheets integration will show the message Installed in the IntegrationList.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Google Sheets, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Google Sheets you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to Google Sheets, it may be due to the multiple reasons:Wrong Mapping Set up - Your mapping with BotPenguin Question and App parameter is either incorrect or you haven’t added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 4: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Google Task. Click on the ‘Integrate tab.’b. The Integrate Window Will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Google Task by:-Either by scrolling down the list or,by typing ‘Google Task’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. As you connect, an Interface, as shown below, will open up. To complete the process,you just need to Sign In with your Google account.Step 2 of 4: Establish connection with your Appa. After you click the “Sign In With Google” button, It will redirect you to a Google loginwindow. Here, fill out your account credentials and sign in.b. Now, click allow for BotPenguin to access your Google account.c. After you click allow, the connection between BotPenguin and Google Task isestablished,and you will be redirected back to Botpenguin.Step 3 of 4: Set up Mapping Parametersa. Now, as connection of the BotPenguin and Google Task is established, you needto map parameters (fields) of Google Task to the user response of the BotPenguin question.Title will be the Title of the worksheet spreadsheet that you wish to create and then parameters to be addedYou can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user’s response fromBotPenguin to the Google Task’s Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Google Task fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,“Mapping successfully.c. You are free to change your associated Google Account. You can disconnect first fromthe ‘Disconnect’ tab and then reconnect Google Task i.e Step 1 . You may also use the ‘Pause’ tab to pause the integration till the time you want your Bot to capture data/leads in Google Task.d. Also, your Google Task integration will show the message Installed in the IntegrationList.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Google Task, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Google Task you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to Google Task, it may be due to the multiple reasons:Wrong Mapping Set up - Your mapping with BotPenguin Question and App parameter is either incorrect or you haven’t added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith HelpShift. Click on the ‘Integrate tab.’b. The Integrate Window Will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find HelpShift by:-Either by scrolling down the list or,by typing ‘HelpShift’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enterDomain NameAPi Keythat you will get by logging into your HelpShift account.Step 2 of 5: Find your Authorization Key/Token in App AccountTo get the API key, login to your helpshift account. On the left side of the dashboard,Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter Helpshift APi key and Domain and click the ‘Connect’ Button to completeintegration of BotPenguin.b. If you have entered all the details correctly, you will see a notification that says,“Integrated Successfully.”Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and HelpShift CRM is established, you needto map parameters (fields) of HelpShift CRM to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user’s response fromBotPenguin to the HelpShift CRM’s Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to HelpShift CRM fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,“Mapping successfully.c. Also, your HelpShift integration will show the message Installed in the Integration List.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and HelpShift CRM, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the HelpShift CRM that you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to HelpShift CRM, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and CRM parameter is either incorrect or you haven’t added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Zendesk CRM. Click on the ‘Integrate tab.’b. The Integrate Window Will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Zendesk CRM by:-Either by scrolling down the list or,by typing ‘Zendesk’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enterAPi TokenEmail AddressAPi URLthat you will get by login to your Zendesk account.Step 2 of 5: Find your Authorization Key/Token in App AccountAPI URL on the top-right corner. Now click on ‘Go to Admin Center’ to get your API Token.b. Go to Apps and Integrations>Zendesk API. If you don’t have an Active API Token list,click ‘Add API Token’ to create one.c. Add a Label to your API Token and copy the coded. Save your API Token and it will be listed in the Active API Token listStep

3 of 5: Enter Authorization Details and establish connection with your Appa. Enter Zendesk API Token, API URL and Email Address registered with Zendesk, andclick the ‘Connect’ Button to complete integration of BotPenguin with Zendesk.b. If you have entered all the details correctly, you will see a notification that says,“Integrated Successfully.”Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and Zendesk is established, you needto map parameters (fields) of Zendesk to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user’s response fromBotPenguin to the Zendesk’s Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Zendesk fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,“Mapping successfully.c. Also, your Zendesk CRM integration will show the message Installed in the IntegrationList.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Zendesk, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Zendesk you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to Zendesk, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and App parameter is either incorrect or you haven’t added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith LeadSquared. Click on the ‘Third-party Apps Integration tab.’b. The Third-party Apps Integration window will open up. Select the ‘All Integrations’tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find LeadSquared by:-Either by scrolling down the list or,by typing ‘LeadSquared’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enter theAccess KeySecret Keythat you will get by logging into your LeadSquared account.Step 2 of 5: Find your Authorization Key/Token in App Accounta. To get the API Token, login to the LeadSquared Admin account and on themain dashboard, click the ‘My Profile’ Icon on the top right corner, and then clickthe ‘Setting’ tab.b. Here, click on ‘API and Webhooks’ tab on the bottom-left cornerc. Switch to the ‘API Access Keys’’ tab and click on ‘Show Secret Key’ tab to find your‘Access ID/Key’ and ‘Secret Key’.Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter LeadSquared Access Key and Secret Key and click the ‘Connect’ Button tocomplete integration of BotPenguin with LeadSquared.b. If you have entered all the details correctly, you will see a notification that says,“Integrated Successfully.”Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and LeadSquared is established, you needto map parameters (fields) of LeadSquared to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user’s response fromBotPenguin to the Lead Squared’s Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to LeadSquared fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,“Mapping successfully.c. Also, your LeadSquared integration will show the message Installed in the IntegrationList.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and LeadSquared, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the LeadSquared you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to LeadSquared, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and CRM parameter is either incorrect or you haven't added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours. Step 1 of 3 Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Zoho Desk. Click on the 'Integrate tab.'b. The Integrate Window Will Open up. Select the 'All Integrations' Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Zoho Desk by:-Either by scrolling down the list or,by typing 'Zoho Desk' in the Search Box with the placeholder "Search Integration By Name"e. Now Click On The 'Connect' Button As Shownf. An Interface, as shown below, will open up. Now you need to select your Zoho domainfrom the dropdown menu.Step 2 of 3: Establish Connection with Zoho Deska. Select your Zoho Domain. Your Zoho Domain will be based on your location. Forexample, For Indian Residents, it will be 'accounts.zoho.in' and for US Residents, it willbe 'accounts.zoho.com'.b. After you select Your Zoho Domain, Click On the 'Connect' Button. It will redirect you toyour official Zoho Account.c. Here, you need to login to your Zoho Account.d. After you successfully log in, a window, as shown below, will appear. Here, click on'Accept' to connect your BotPenguin account with Zoho Desk. That's It, All Done!Step 3 of 3: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Zoho Desk, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Zoho Desk you have integrated.Still Not Working, Let's Troubleshoot!If you are not getting dummy lead from your Bot to Zoho Desk, it may be due to the multiple reasons:Wrong Domain added- You will be required to check and see if you have selected the Domain URL correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith SupportBee CRM. Click on the 'Integrate tab.'b. The Integrate Window Will Open up. Select the 'All Integrations' Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find SupportBee CRM by:-Either by scrolling down the list or,by typing 'SupportBee CRM' in the Search Box with the placeholder "Search Integration By Name"e. Now Click On The 'Connect' Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enter the APi keythat you will get by logging into your SupportBee account.Step 2 of 5: Find your Authorization Key/Token in App Accounta. To get the API key, login to the SupportBee account.b. Click on the profile on the top left-side of the dashboard and them click on API Tokenc. Copy the API TokenStep 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter SupportBee APi key and click the 'Connect' Button to complete integration ofBotPenguin with SupportBee.b. If you have entered all the details correctly, you will see a notification that says,"Integrated Successfully."Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and SupportBee is established, you needto map parameters (fields) of SupportBee to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user's response fromBotPenguin to the SupportBee Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to SupportBee fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,"Mapping successfully."c. Also, your SupportBee integration will show the message Installed in the IntegrationList.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and SupportBee, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the SupportBee that you have integrated.Still Not Working, Let's Troubleshoot!If you are not getting dummy lead from your Bot to SupportBee, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the

authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and App parameter is either incorrect or you haven't added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.
Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Wealthbox CRM. Click on the 'Integrate tab.'b. The Integrate Window Will Open up. Select the 'All Integrations' Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Wealthbox CRM by:-Either by scrolling down the list or,by typing 'Wealthbox CRM' in the Search Box with the placeholder "Search Integration By Name"e. Now Click On The 'Connect' Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enter the Accesstoken that you will get by logging into your Wealthbox CRM account.Step 2 of 5: Find your Authorization Key/Token in App Accounta. To get the API key, login to Wealthbox CRM accountOn the top right corner, click on the three dots next to your profile name and then clickon the 'Settings' tab.b. Click on 'API Access' tab. In case your Access Token is not listed there, click on'Create Access Token'c. Enter the Label e.g. 'Access1' for the New Access Token and save it,d. Here you are!. Next to the Access Token Label will be Wealthbox Access Token Key e.g.2c783df2ec094a1e8618c7d1ff531840Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter Wealthbox CRM APi Access token and click the 'Connect' Button to completeintegration of BotPenguin.b. If you have entered all the details correctly, you will see a notification that says,"Integrated Successfully."Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and Wealthbox CRM is established, you needto map parameters (fields) of Wealthbox CRM to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user's response fromBotPenguin to the Wealthbox CRM's Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Wealthbox CRM fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,"Mapping successfully.c. Also, your Wealthbox CRM integration will show the message Installed in the IntegrationList.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Wealthbox CRM, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Wealthbox CRM that you have integrated.Still Not Working, Let's Troubleshoot!If you are not getting dummy lead from your Bot to WealthboxCRM, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and CRM parameter is either incorrect or you haven't added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.
Step 1 of 5: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account. Now, select and click the Bot you want to integrate with SendInBlue. Click on the 'Integrate tab.'The Integrate Window Will Open up. Select the 'All Integrations' Tab.A list of all native integrations for BotPenguin will be available in this window.Now find SendInBlue by:-Either by scrolling down the list or,by typing 'SendInBlue' in the Search Box with the placeholder "Search Integration By Name"Now click on the 'Connect' button as shownAn Interface, as shown below, will open up. Here, you will be asked to enter the API key that you will get by logging into your SendInBlue account.Step 2 of 5: Find your Authorization Key/Token in App AccountTo get the API key, login to the SendInBlue account. Click on the drop down next to your profile name on the top right-side of the screen. Click the SMTP & API tab.Click +CREATE A NEW API KEY tab to create one if your APi key is not thereEnter Name of your API Key and click GenerateCopy your API key.Step 3 of 5: Enter Authorization Details and establish connection with your AppNow enter the API key, and click the 'Connect' Button to complete integration of BotPenguin with SendInBlue.If you have entered all the details correctly, you will see a notification that says,

“Integrated.”Step 4 of 5: Set up Mapping ParametersNow, as the connection of the BotPenguin and SendInBlue is established, you need to map parameters (fields) of SendInBlue to the user response of the BotPenguin question/queries.You can use the +Add Parameters button to add more fields.For example, you select a question from Bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user’s response from BotPenguin to the SendInBlue App’s Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to SendInBlue App fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.If you have entered all the details correctly, you will see a notification that says, “Mapped successfully.”c. Also, your SendInBlue CRM integration will show the message Installed in theIntegration List.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and SendInBlue and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the SendInBlue that you have integrated.Still Not working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to CRM, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as Token, API key, URLMetc has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and 3rd App parameter is either incorrect or you haven’t added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, Write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integrate with Apptivo CRM. Click on the ‘Integrate tab.’b. The Integrate Window Will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Apptivo by:-Either by scrolling down the list or,by typing ‘Apptivo’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enterAPi keyAccess Keythat you will get by logging into your Apptivo CRM account.Step 2 of 5: Find your Authorization Key/Token in App Accounta. To get the API key and Access Key, login to the Apptivo CRM account, and on thedashboard, click on the small triangle button next to your profile name. Select the‘Business Settings’b. On the left side of the dashboard, scroll down and select the ‘API Access’ tab to getyour APi Key and Access Key.Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter Apptivo APi key and Access Key and click the ‘Connect’ Button to completeintegration of BotPenguin with Recurly CRM.b. If you have entered all the details correctly, you will see a notification that says,“Integrated Successfully.”Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and Apptivo is established, you needto map parameters (fields) of Apptivo to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user’s response fromBotPenguin to the Apptivo’s Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Apptivo fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,“Mapping successfully.c. Also, your Apptivo integration will show the message Installed in the Integration List.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Apptivo, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Apptivo you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to Apptivo, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and Apptivo parameter is either incorrect or you haven’t added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 4: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Freshdesk CRM. Click on the ‘Integrate tab.’b. The Integrate Window Will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Freshdesk by:-Either by scrolling down the list or,by typing ‘Freshdesk’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enterFreshdesk DomainAPI Tokenthat you will get by logging into your Freshdesk account.Step 2 of 4: Find your Authorization Key/Token in App Accounta. Freshdesk Domain is of the format ‘https://yourcompanysubdomain.freshdesk.com e.g.https://relinns-botpenguin.freshdesk.com/b. To get the API token, login to the Freshdesk account. On the top right corner, Click onyour profile icon and then click on the ‘Profile Settings’ tab.c. Find ‘Your API Key’ on the top-right corner of My Profile Settings.Step 3 of 4: Enter Authorization Details and establish connection with your Appa. Enter Freshdesk Domain and API Key or Token, then click the ‘Connect’ Button tocomplete integration of BotPenguin with Freshdesk CRM.b. If you have entered all the details correctly, you will see a notification that says,“Integrated Successfully.”c. Your Freshdesk integration is completed and it will show the message Installed in theIntegration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Freshdesk, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Freshdesk you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to Freshdesk, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 4: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Help Desk CRM. Click on the ‘Integrate tab.’b. The Integrate Window Will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Help Desk by:-Either by scrolling down the list or,by typing ‘Help Desk’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enter theAccount IDAccess Tokenthat you will get by logging into your Help Desk account.Step 2 of 4: Find your Authorization Key/Token in App Accounta. To get the Account ID and Access Token, login to the Help Desk CRM account and clickon ‘Go to Helpdesk’ tabb. Navigate to Settings>Integrations>Show APIc. Click on the ‘Authentication’ tab, and then click on ‘Developer Console, to create thePersonal Access Token.d. Navigate to the Tools>Personal Access Token> Create new tokene. Mention Label/Name of your access token and choose Access Scopes as ‘Select all’.Scroll down the window and click ‘Create new token’ tabf, And your ‘Account ID’ and ‘Access Token’ will be generated. Copy the detailsStep 3 of 4: Enter Authorization Details and establish connection with your Appa. Enter Help Desk Account Id and Access Token and click the ‘Connect’ Button tocomplete integration of BotPenguin with Help Desk CRM.b. If you have entered all the details correctly, you will see a notification that says,“Integrated Successfully.”c. Also, your Help Desk CRM integration will show the message Installed in the IntegrationList.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Help Desk, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Help Desk you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to Help Desk, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as Access Token, Account ID have been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Helpcrunch CRM. Click on the ‘Integrate tab.'b. The Integrate Window Will Open up. Select the 'All Integrations' Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Helpcrunch CRM by:-Either by scrolling down the list or,by typing 'Helpcrunch CRM' in the Search Box with the placeholder "Search Integration By Name"e. Now Click On The 'Connect' Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enter the APi keythat you will get by logging into your Helpcrunch CRM account.Step 2 of 5: Find your Authorization Key/Token in App Accounta. To get the API key, login to the Helpcrunch CRM account and on Helpcrunchdashboard, click the Settings icon. Scroll down the bar and then click theDevelopers tab > Public API to get your APi key.b. Click on Public API to get API Key. Copy it to clipboard.Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter Helpcrunch CRM APi key and click the 'Connect' Button to complete integration ofBotPenguin with Helpcrunch CRM.b. If you have entered all the details correctly, you will see a notification that says,"Integrated Successfully."Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and Helpcrunch is established, you needto map parameters (fields) of Helpcrunch to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user's response fromBotPenguin to the Helpcrunch's Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Helpcrunch fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,"Mapping successfully.c. Also, your Helpcrunch CRM integration will show the message Installed in theIntegration List.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Helpcrunch, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Helpcrunch you have integrated.Still Not Working, Let's Troubleshoot!If you are not getting dummy lead from your Bot to Helpcrunch, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and CRM parameter is either incorrect or you haven't added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Jira CRM. Click on the 'Integrate tab.'b. The Integrate Window Will Open up. Select the 'All Integrations' Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Jira CRM by:-Either by scrolling down the list or,by typing 'Jira CRM' in the Search Box with the placeholder "Search Integration By Name"e. Now click on the 'Connect' button as shownf. After you click the connect button, The Integration window for Jira CRM will appear, as shown below.g. To complete the process, you require three details:APi TokenEmail AddressJira CRM DomainStep 2 of 5: Find your Authorization Key/Token in App Accounta. To obtain the Jira API Token, log in to https://id.atlassian.com/manage/api-tokens.On the My API tokens tab, click New API Token.On the New API Token pop-up, click Create API Token.b. Email address is your Atlassian account email address. You can also see it from yourprofile on the Jira CRM dashboard.c. Jira CRM Domain is the part of the domain on the system dashboard that ends withatlassian.net e.g. https://mycompany.atlassian.net.Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Now enter APi key, Email address and Jira CRM Domain, and click the 'Connect' Buttonto complete integration of BotPenguin with Jira CRM.b. If you have entered all the details correctly, you will see a notification that says,"Integrated."Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and Jira CRM is established, you needto map parameters (fields) of Jira CRM to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user's response from BotPenguin to the Jira CRM's Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Jira CRM fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,“Mapped successfully.”c. Also, your Jira CRM integration will show the message Installed in the Integration List.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Jira CRM and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Jira CRM that you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to CRM, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as Token, API key,and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and Jira CRM parameter is either incorrect or you haven’t added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith KarmaCRM. Click on the ‘Integrate tab.’b. The Integrate Window Will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find KarmaCRM by:-Either by scrolling down the list or,by typing ‘KarmaCRM’ in the Search Box with the placeholder “Search Integration By Name”e. Now click on the ‘Connect’ button as shownf. An Interface, as shown below, will open up. Here, you will be asked to enter the APi keythat you will get by logging into your KarmaCRM account.Step 2 of 5: Find your Authorization Key/Token in App Accounta. To get the API key, login to the KarmaCRM account.b. Click on the profile name on the top right-side of the screen and them click on Settingsc. Go to the bottom of this page, you will find your APi Key.Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter the KarmaCRM APi key and click the ‘Connect’ Button to complete integration ofBotPenguin with KarmaCRM.b. If you have entered all the details correctly, you will see a notification that says,“Integrated Successfully.”Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and KarmaCRM is established, you needto map parameters (fields) of KarmaCRM to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user’s response from BotPenguin to the KarmaCRM’s Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to KarmaCRM fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,“Mapping successfully.”c. Also, your KarmaCRM integration will show the message Installed in the IntegrationList.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and KarmaCRM and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the KarmaCRM that you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to KarmaCRM, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as Token, API key,and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and CRM parameter is either incorrect or you haven’t added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea, Login to your BotPenguin account. Now, select and click the Bot you want to integratewith LiveAgent CRM. Click on the ‘Integrate tab.’b. The Integrate Window Will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find LiveAgent CRM by:-Either by scrolling down the list or,by typing ‘LiveAgent CRM’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enter the APi keyand APi URLthat you will get by logging into your LiveAgent account.Step 2 of 5: Find your Authorization Key/Token in App AccountTo get the API key, login to the LiveAgent account. While logged in as an adminnavigate to Configuration> System> API which loads the API v3 section where you findyour APi URL, and existing API keys. If you don’t find APi key, click ‘AddAPi key’. Copythe APi Key.Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter LiveAgent APi key and APi URL. Click the ‘Connect’ Button to complete integrationof BotPenguin with LiveAgent.b. If you have entered all the details correctly, you will see a notification that says,“Integrated Successfully.”Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and LiveAgent is established, you needto map parameters (fields) of LiveAgent CRM to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user’s response fromBotPenguin to the LiveAgent’s Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to LiveAgent CRM fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,“Mapping successfully.b. Also, your LiveAgent integration will show the message Installed in the Integration List.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and LiveAgent CRM, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the LiveAgent that you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to LiveAgent CRM, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and CRM parameter is either incorrect or you haven’t added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith NetHunt. Click on the ‘Integrate tab.’b. The Integrate window will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find NetHunt by:-Either by scrolling down the list or,by typing ‘NetHunt’ in the Search Box with the placeholder “Search Integration By Name”e. Now click on the ‘Connect’ button as shownf. An Interface, as shown below, will open up. Here, you will be asked to enterEmail Address registered with NetHuntAPi keythat you will get by logging into your NetHunt account.Step 2 of 5: Find your Authorization Key/Token in App Accounta. To get the API key, login to the NetHunt account. Scroll down and you will find the‘Settings’ tab on the bottom-left corner. Go to Settings>Other integrations>Generate APIKeyb. Click on ‘Generate APi Key’ and your APi key will be generated. Copy the key.Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter the NetHunt APi key and registered email address, and click the ‘Connect’ Buttonto complete integration of BotPenguin with NetHunt.B. If you have entered all the details correctly, you will see a notification that says,“Integrated Successfully.”Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and NetHunt CRM is established, you needto map parameters (fields) of NetHunt CRM to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user’s response fromBotPenguin to the NetHunt CRM’s Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to NetHunt CRM fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. Select the ‘Lead ID’c. If you have entered all the details correctly, you will see a notification that says,“Mapping successfully.”d. Also, your NetHunt integration will show the message Installed in the Integration List.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and NetHunt CRM, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the NetHunt CRM that you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to NetHunt CRM, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and CRM parameter is either incorrect or you haven’t added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Plivo CRM. Click on the ‘Integrate tab.’b. The Integrate Window Will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Plivo CRM by:-Either by scrolling down the list or,by typing ‘Plivo’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enterAuthorization IDAuthorization Tokenthat you will get by logging into your Plivo account.Step 2 of 5: Find your Authorization Key/Token in App AccountTo get the Auth ID and Token, login to the Plivo account and on main dashboard, youwill locate your Auth .ID and Auth. Token. Copy the details.Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter Plivo Auth. ID and Auth. Token and click the ‘Connect’ Button to completeintegration of BotPenguin with Plivo.b. If you have entered all the details correctly, you will see a notification that says,“Integrated Successfully.”Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and Plivo is established, you needto map parameters (fields) of Plivo to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user’s response fromBotPenguin to the Plivo’s Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Plivo fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,“Mapping successfully.c. Also, your Plivo integration will show the message Installed in the Integration List.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Plivo, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Plivo you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to Plivo, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and CRM parameter is either incorrect or you haven’t added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Recurly CRM. Click on the ‘Integrate tab.’b. The Integrate Window Will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Recurly CRM by:-Either by scrolling down the list or,by typing ‘Recurly CRM’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enter the APi keythat you will get by logging into your Recurly CRM account.Step 2 of 5: Find your Authorization Key/Token in App Accounta. To get the API key, login to the Recurly CRM admin or developer account and onRecurly dashboard, navigate to Integrations > API Credentials.b. Click on API Credential to get your Private APi Key. Copy Recurly CRM APi key.Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter Recurly CRM APi key and click the ‘Connect’ Button to complete integration ofBotPenguin with Recurly CRM.b. If you have entered all the details correctly, you will see a notification that says,“Integrated Successfully.”Step 4 of 5: Set up

Mapping Parametersa. Now, as connection of the BotPenguin and LiveAgent is established, you needto map parameters (fields) of LiveAgent CRM to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user's response fromBotPenguin to the Recurly's Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Recurly CRM fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,"Mapping successfully.c. Also, your Recurly CRM integration will show the message Installed in the IntegrationList.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Recurly CRM, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Recurly CRM that you have integrated.Still Not Working, Let's Troubleshoot!If you are not getting dummy lead from your Bot to Recurly CRM, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and CRM parameter is either incorrect or you haven't added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Shipway CRM. Click on the 'Integrate tab.'b. The Integrate Window Will Open up. Select the 'All Integrations' Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Shipway CRM by:-Either by scrolling down the list or,by typing 'Shipway' in the Search Box with the placeholder "Search Integration By Name"e. Now Click On The 'Connect' Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enterUser NameLicense Keythat you will get by login to your Shipway account.Step 2 of 5: Find your Authorization Key/Token in App Accounta. To get the License Key, login to the Shipway account. On the dashboard, click on'Settings' tab and then click on 'General'b. And you will find you 'User Name' and 'License Key'Step 3 of 5: Enter Authorization Details and establish connection with your Appa, Enter Shipway User Name and License Key, and click the 'Connect' Button to completeintegration of BotPenguin with Shipway.b. If you have entered all the details correctly, you will see a notification that says,"Integrated Successfully."Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and Shipway is established, you needto map parameters (fields) of Shipway to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user's response fromBotPenguin to the Shipway's Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Shipway fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,"Mapping successfully.c. Also, your Shipway CRM integration will show the message Installed in the IntegrationList.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Shipway, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Shipway you have integrated.Still Not Working, Let's Troubleshoot!If you are not getting dummy lead from your Bot to Shipway, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and App parameter is either incorrect or you haven't added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith TeamGate CRM. Click on the ‘Integrate tab.’b. The Integrate Window Will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find TeamGate CRM by:-Either by scrolling down the list or,by typing ‘Teamgate’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. An Interface, as shown below, will open up. Here, you will be asked to enterApplication KeyAuthorization Tokenthat you will get by logging into your TeamGate account.Step 2 of 5: Find your Authorization Key/Token in App Accounta. To get the Application Key, login to the TeamGate account. On the top right corner,Click on your profile and then click on the ‘Settings’ tab.b. Scroll down the page . Click on ‘Additional Features’ on the bottom left corner and switchto ‘External Apps’ tab.c. Find your APi Key Label, In case it is not there, click ‘New API Key Request’ to createone.d. Enter your APi Key Label/Description and it will be listed under ‘Application’,e. Click on your APi Key Label to find your Application Key and copy it for BotPenguinintegration.f. To get TeamGate Authorization Token, on the dashboard click on your profile on thetop-right corner,g. Click on the ‘Integration tab’ and then click ‘API Access’ to get your ‘AuthorizationToken’.Step 3 of 5: Enter Authorization Details and establish connection with your Appa. Enter TeamGate’s Application key and Auth. Token, and click the ‘Connect’ Button tocomplete integration of BotPenguin with TeamGate CRM.b. If you have entered all the details correctly, you will see a notification that says,“Integrated Successfully.”Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and TeamGate is established, you needto map parameters (fields) of TeamGate to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user’s response fromBotPenguin to the TeamGate’s Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to TeamGate fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.b. If you have entered all the details correctly, you will see a notification that says,“Mapping successfully.c. Also, your TeamGate integration will show the message Installed in the Integration List.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and TeamGate, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the TeamGate you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to TeamGate, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and CRM parameter is either incorrect or you haven’t added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 3 Login to BotPenguin Account and Select Application to Integratea. Login to your BotPenguin account. Now, select and click the Bot you want to integratewith Zoho Projects. Click on the ‘Integrate tab.’b. The Integrate Window Will Open up. Select the ‘All Integrations’ Tab.c. A list of all native integrations for BotPenguin will be available in this window.d. Now find Zoho Projects by:-Either by scrolling down the list or,by typing ‘Zoho Projects’ in the Search Box with the placeholder “Search Integration By Name”e. Now Click On The ‘Connect’ Button As Shownf. An Interface, as shown below, will open up. Now you need to select your Zoho domainfrom the dropdown menu.Step 2 of 3: Establish Connection with Zoho Deska. Select your Zoho Domain. Your Zoho Domain will be based on your location. Forexample, For Indian Residents, it will be ‘accounts.zoho.in’ and for US Residents, it willbe ‘accounts.zoho.com’.b. After you select Your Zoho Domain, Click On the ‘Connect’ Button. It will redirect you toyour official Zoho Account.c. Here, you need to login to your Zoho Account.d. After you successfully login, a window, as shown below, will appear. Here, click on‘Accept’ to connect your BotPenguin account with Zoho Projects. That’s It, All Done!Step 3 of 3: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Zoho Projects, and the mapping is complete, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the Zoho Projects you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to Zoho Projects, it may be due to the multiple reasons:Wrong Domain added- You will be required to check and see if you have selected the Domain URL correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

Step 1 of 3: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, select the Bot you want to integrate with Zoho CRM.Now, click the ‘Integrate’ tab.The integrate window will open up. make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find Zoho CRM by:-Either scrolling down the listOr by typing in ‘Zoho CRM’ in the search box with the placeholder “search integration by name”Now click on the ‘connect’ button as shownStep 2 of 3: Establish connection with your AppAn Interface, as shown below, will open up.Now you need to select your Zoho domain from the dropdown menu. Your Zoho domain will be based on your location. For example, for Indian residents, it will be (accounts.Zoho.in)After you select your Zoho domain, click on the ‘Connect’ button.After you click the ‘Connect’ button, it will redirect you to your official Zoho domain.Here, you need to log into your Zoho account.After you successfully log in, a window, as shown below, will appear.Here, click on ‘Accept’ to connect your BotPenguin account with Zoho CRM.After you have connected Zoho CRM, your details will show up as shown below:That’s all you are done with this stepStep 3 of 3: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Zoho CRM and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and in the Zoho CRM you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Zoho CRM, it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, select the Bot you want to integrate with Agile CRM.Now, click the ‘Integrate’ tab.The integrate window will open up. Make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find Agile CRM by:-Either scrolling down the listOr by typing in ‘Agile CRM’ in the search box with the placeholder “search integration by name”e. Now click on the ‘connect’ button as shown below.Step 2 of 4: Find your Authorization Key/Token in App AccountAfter you click the connect button, the integration window for Agile CRM will appear, as shown below.To complete the process, you require three details:Agile CRM DomainEmail AddressAPI TokenAgile CRM Domain:To obtain the Agile CRM Domain, login into your Agile CRM account. Navigate to your browser search bar, copy the address from there, and paste it into the BotPenguin interface.Email Address:The email address is the same as the one you signed up with on Agile CRM. You can also see it from your Agile CRM dashboard after clicking on the Profile Icon.API Key:To obtain the API Token, click on Admin Settings.Then, navigate to Developers and API.Under API Keys, copy the REST API Key.Step 3 of 4: Enter Authorization Details and establish connection with your Appa. After filling out all the details, click on the Connect button.b. If you have entered all the details correctly, you will see a notification that says, “Updated successfully.”c. Also, your Agile CRM integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Agile CRM and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and in the Agile CRM you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Agile CRM, it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Integrate BotPenguin with Pipedrive:-Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, select the bot you want to integrate with Pipedrive.Now, click the ‘integrate Tab.’The integrate window will open up. make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find Pipedrive By:-Either scrolling down the listOr by typing in ‘Pipedrive’ in the search box with the placeholder “search integration by name.”Now click on the ‘Connect’ button as shown belowStep 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out three details:-Your Pipedrive DomainAPI TokenLead TitlePipedrive Domain:-Your Pipedrive Domain is a portal for your organization on Pipedrive. You can easily find it in your browser’s search bar when you log in to your Pipedrive account.API Token;-Click on your profile icon on your pipedrive account to obtain the API Token.Then go to company settings.There, click on personal preferences.Here, click on API.Now, copy your API Token.Lead Title:The lead title is your choice. You can name your lead anything you want. For ex:-Pipedrive test lead.After filling out all the details, click on Connect to complete the process.Step 3 of 4: Enter Authorization Details and establish connection with your AppAfter you click on connect, look for the notification “Updated Successfully” for confirmationAlso, your Pipedrive CRM integration will show the message installed in the integration list.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Pipedrive and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguindashboard and the Pipedrive you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Pipedrive, it may be due to multiple reasons:Wrong Authorization Details added- You need to check and see if all the authorization credentials, such as API Token, API key, and URL, have been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin, as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, select the bot you want to integrate with Drip CRM.Now, click the ‘Integrate Tab.’The integrate window will open up. make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find Drip CRM By:-Either scrolling down the listOr by typing in ‘Drip CRM’ in the search box with the placeholder “search integration by name.”Step 2 of 4: Find your Authorization Key/Token in App AccountNow click on the ‘Connect’ button as shown belowTo complete the process, you need to fill out two details:-Your Drip CRM IDThe API TokenDrip CRM Id:-You can obtain your account id from your browser’s search bar after you log in to your account.Your account id will be in your browser’s search bar. It will be a number between “getdrip.Com/” and “/dashboard/”For example, the URL is- getdrip.Com/798564/dashboard.Here 798654 is your account id.Here’s another example:-Here - 9710367 is the Drip CRM IDAPI Token:-To obtain your API token, click on your profile icon beside the search icon as shown below,Now, navigate to user settings.Now, under user info, scroll down to apiYou can see your api token with the message “keep it a secret” directly below it.Copy this API token and paste it back on BotPenguin.Step 3 of 4: Enter Authorization Details and establish connection with your AppAfter filling out all the details, click on the Connect button.After you click on connect, look for the notification “updated successfully” for confirmationAlso, your Drip CRM integration will show the message installed in the integration list.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Drip CRM and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and in the Drip CRM you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Drip CRM, it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan-You are not subscribed to the paid plan on BotPenguin as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Step 1 of 3: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, select the bot you want to integrate with Google Calendar.Now, click the ‘Integrate Tab.’The integrate window will open up. make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find Google Calendar By:-Either scrolling down the listOr by typing in ‘Google Calendar’ in the search box with the placeholder “search integration by name.”Step 2 of 3: Enter Authorization Details and establish connection with your AppNow click on the

‘Connect’ button as shown belowTo complete the process, you just need to sign in with your Google Account.After you click the “Sign In With Google” button, it will redirect you to a google login window. Here, fill out your account credentials and sign in.Now, click AllowAfter you click allow, it will redirect you to BotPenguin. Now, you can easily see your appointment summary and description.The Appointment Summary - It will give you a brief overview of your appointment, it will show the Title of your appointment as per your Google Calendar.The Appointment Description - The description of your appointment as per your Google calendar will be displayed in this field.You are free to change your associated google account (disconnect first).Pause the integration(till the time you want your bot to not ask for an appointment).You can also disconnect (if you don’t want the google calendar integration).Also, your Google Calendar integration will show the message Installed in the Integration List.Step 3 of 3: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Google Calendar and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and the Google Calendar you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Google Calendar, it may be due to multiple reasons:Wrong Authorization Details added- You need to check and see if all the authorization credentials, such as API Token, API key, and URL, have been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin, as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.
Integrate BotPenguin with GetResponse:-Step 1 of 5: Login to BotPenguin Account and Select Application to IntegrateLogin To Your BotPenguin Account, Select The Bot You Want To Integrate With GetResponse.Now, Click The ‘integrate Tab.’The Integrate Window Will Open Up. Make Sure You Are In The “All Integrations Tab.”A List Of All Native Integrations For BotPenguin Will Be Available In This Window.Now find GetResponse By:-Either Scrolling Down The ListOr By Typing In ‘GetResponse’ In The Search Box With The Placeholder “Search Integration By Name.”Now Click On The ‘connect’ button As Shown Below.Step 2 of 5: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenThe API Token:-Click the tools button on the top ribbon of your GetResponse dashboard.Here, click on the ‘Integrations and API’ tab.Now, navigate to the API tab.Under the API tab, click on generate API key.Enter a name for your API Key and click the Generate button.Copy your API key and paste it back on BotPenguin.Step 3 of 5: Enter Authorization Details and establish connection with your AppAfter filling out the details, click Connect.Look for the notification “Integrated Successfully” for confirmation.Step 4 of 5: Set up Mapping ParametersNow Select Your CampaignIdAlso, you need to map queries to parameters:-Now, as the connection of the BotPenguin and GetResponse is established, you need to map the parameters (fields) of GetResponse to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -Name.As a result, this mapping will enable integration to send the user’s response fromBotPenguin to the Infobip’s Name field in the leads. Similarly, for integration to work correctly, you must map all other questions/ components of your Bot to Infobip fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So make sure you configure your chat flow first.If you have entered all the details correctly, you will see a notification that says, “Mapping successfully.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and GetResponse and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and in the GetResponse you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy lead from your Bot to GetResponse, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as Token, API key,and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and GetResponse parameter is either incorrect or you haven’t added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@BotPenguin.com. We will respond back within 48 business hours.
Integrate BotPenguin with Groove:-Step 1 of 5: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, and select the Bot you want to integrate with Groove.Now, click the ‘Integrate’ tab.The Integrate window will open up. Make sure you are in the “All Integrations

Tab."A list of all native integrations for BotPenguin will be available in this window.Now find Groove by:-Either scrolling down the listOr by typing in 'Groove' in the search box with the placeholder "search integration by name"Now click on the 'connect' button as shown below.Step 2 of 5: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenThe API Token:-Click the Settings button (the gear icon), on the left-most side of Your Groove dashboard.Here, click on the company tab.Now, navigate to the 'Webhooks & API' button.Under the 'Webhooks & API' button, Click on the API button.Copy the API token under the Global Token Tab and paste it on BotPenguin.Step 3 of 5: Enter Authorization Details and establish connection with your AppAfter filling out the API Key, Click Connect.Look for the notification "Integrated Successfully" for confirmation.Also, your Groove integration will show the message Installed in the Integration List.Step 4 of 5: Set up Mapping ParametersNow, as the connection of the BotPenguin and Groove is established, you need to map the parameters (fields) of Groove to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -Name.As a result, this mapping will enable integration to send the user's response fromBotPenguin to the Infobip's Name field in the leads. Similarly, for integration to work correctly, you must map all other questions/ components of your Bot to Infobip fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So make sure you configure your chat flow first.If you have entered all the details correctly, you will see a notification that says, "Mapping successfully.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Groove and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and in the Groove you have integrated.Still Not Working, Let's Troubleshoot!If you are not getting dummy lead from your Bot to Groove, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as Token, API key,and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and Jira CRM parameter is either incorrect or you haven't added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@BotPenguin.com. We will respond back within 48 business hours.

Integrate BotPenguin with Helpdocs:-Step 1 of 5: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, and select the Bot you want to integrate with HelpDocs.Now, click the 'Integrate' tab.The Integrate window will open up. Make sure you are in the "All Integrations Tab."A list of all native integrations for BotPenguin will be available in this window.Now find HelpDocs by:-Either scrolling down the listOr by typing in 'HelpDocs' in the search box with the placeholder "search integration by name"Now click on the 'connect' button as shown below.Step 2 of 5: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenThe API Token:-Click The settings button, under your profile icon on your Helpdocs dashboard.Here, navigate to the API Tab.Now, you need to create an API Key. Click on the 'Create Key' button.It will generate an API Key. The name of the first key you generate will be "Unnamed."Click on the three dots icon and click on edit to configure your API Key. Now, a separate window will appear.Here you can rename your API Key. Also, toggle the read and write permissions for your API Key.Moreover, copy your API Key from here to paste it into your BotPenguin Account.After Making Changes, click on Save Changes.Step 3 of 5: Enter Authorization Details and establish connection with your AppAfter filling out the API key, click Connect.Look for the notification "Integrated Successfully" for confirmation.Also, your HelpDocs integration will show the message Installed in the Integration List.Step 4 of 5: Set up Mapping ParametersNow, as the connection of the BotPenguin and HelpDocs is established, you need to map the parameters (fields) of HelpDocs to the user response of the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name?Then, you map it with the parameter -Name.As a result, this mapping will enable integration to send the user's response fromBotPenguin to the Infobip's Name field in the leads. Similarly, for integration to work correctly, you must map all other questions/ components of your Bot to Infobip fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So make sure you configure your chat flow first.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and HelpDocs and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and in the HelpDocs you have integrated.Still Not Working, Let's Troubleshoot!If you are not getting dummy lead from your Bot to HelpDocs, it may be due to the multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as Token, API key,and/or URL has been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and HelpDocs parameter is either incorrect or you haven't added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@BotPenguin.com. We will respond back within 48 business hours.

Integrate BotPenguin with Bitrix24:-Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, select the Bot you want to integrate with Bitrix24.Now, click the 'Integrate' tab.The integrate window will open up. make sure you are in the "All Integrations Tab."A list of all native integrations for BotPenguin will be available in this window.Now find Bitrix24 by:-Either scrolling down the listOr by typing in 'Bitrix24' in the search box with the placeholder "search integration by name"Now click on the 'connect' button.Now follow the steps further for integrating bitrix24Step 1 : Go on Third-Party Apps Integration followed by Bitrix24 and provide Inbound webhook URLStep 2 : After opening Bitrix24 CRM, go on side bar select Applications followed by Developer resourcs.Step 3 : Select Other in Developer ResourcesStep 4 : Select Inbound WebhookStep 5 : Scroll Down and click on Assign Permissions and copy "Webhook to call REST API"Step 6 : Assign two permissions - 1. CRM 2. Commercial catalogStep 7 : Go back on the Botpenguin Bitrix24 integration page and paste the URL.Steps 8 : Copy Webhook URLStep 9 : Go to Bitrix24 CRM then click on Applications then Developer Resources then other andStep 10 : Paste the copied link on "Your Handler URL" and click on Events then click on + select.Step 11 : After clicking on " + select" select two events - 1. Lead created (ONCRMLEADADD) 2. Lead updated (ONCRMLEADUPDATE)After that click on save and click on connect button to connect botpenguin with Bitrix24.Step 12 : Now Page will look similar to this.If you want to add other parametres to the lead, then map Botpenguin attributes with lead response from bitrix24.Click on select parameter option, you will get the key which we get in the form of lead response from bitrix24.Click on select option, you will get the Botpenguin attributes on which you want to map lead response key's values.Finally click on update button to save all your changes.Steps to trigger campaign when there is any change in lead attributes in bitrix24Follow these steps to set up Drip Campaign using whatsapp bot when there is any change in lead attributes in Bitrix24 CRM.Step 1: Click on WhatsApp Automation.Step 2: Click on Drip Campaign option inside WhatsApp Automation.Step 3: Name your drip campaign and then click on continue.Step 4: Click on enrolled contacts then go on contact enrolment rules.Under Custom Enrolment Values SectionSelect key for which you want to trigger drip campaign when this key value changes according to the relation set by you.Select which type of relation you want "is" means equal to or "is not" means not equal toEnter the value which you want to compare with the key change.After that select template which you want to send when drip campaign is triggered.Click on Create Drip Campaign

Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, select the Bot you want to integrate with Freshworks CRM.Now, click the 'Integrate Tab.'The integrate window will open up. make sure you are in the "All Integrations Tab."A list of all native integrations for BotPenguin will be available in this window.Now find Freshworks CRM By:-Either scrolling down the listOr by typing in 'Freshworks CRM' in the search box with the placeholder "search integration by name."Now click on the 'Connect' button as shown belowStep 2 of 4: Find your Authorization Key/Token in App AccountNow Click On The 'Connect' button As Shown BelowTo complete the process, you need to fill out two details:-Your Freshworks CRM DomainAPI TokenFreshworks CRM Domain:-You can easily find your domain in your browser's search bar when you log in to your Freshworks Account.It's in the format:- https://yourcompany.myfreshworks.com.Here 'your_company' will be replaced by the name of your organization.Freshworks CRM API Token:-To obtain your API token:-Click Your Profile Icon and Navigate To SettingsClick on the API settings Tab and Fill out The Captcha.After you verify you are a human, your API key will become visible. Copy and paste the key back on BotPenguinStep 3 of 4: Enter Authorization Details and establish connection with your AppAfter filling out the details, click Connect.Look for the notification "Updated Successfully" for confirmation.Also, your Freshworks CRM integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and FreshWorks CRMand complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and in the Freshworks CRM you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to FreshWorks CRM, it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only with the paid plan..If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, and select the Bot you want to integrate with Insightly CRM.Now, click the ‘Integrate’ tab.The Integrate window will open up. Make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find Insightly CRM by:-Either scrolling down the listOr by typing in ‘Insightly CRM’ in the search box with the placeholder “search integration by name”Now click on the ‘connect’ button as shown below.Step 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenThe API Token:-Click on the Profile Icon on your dashboard to obtain the API token.There, Navigate to User Settings.Scroll down in the user settings tab until you can see the API section.Copy the API key and paste it back on BotPenguin.Step 3 of 4: Enter Authorization Details and establish connection with your AppAfter filling out the API key, click Connect.Look for the notification “Connected Successfully” for confirmation.Also, your Insightly CRM integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Insightly CRM and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and the Insightly CRM you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Insightly CRM, it may be due to multiple reasons:Wrong Authorization Details added- You need to check and see if all the authorization credentials, such as API Token, API key, and URL, have been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin, as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin To Your BotPenguin Account, Select The Bot You Want To Integrate With OntraPort CRM.Now, Click The ‘integrate Tab.’The Integrate Window Will Open Up. Make Sure You Are In The “All Integrations Tab.”A List Of All Native Integrations For BotPenguin Will Be Available In This Window.Now find Nutshell CRMBy-Either Scrolling Down The ListOr By Typing In ‘Nimble CRM’ In The Search Box With The Placeholder “Search Integration By Name.”Now Click On The ‘Connect’ button As Shown Below.Step 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenThe API Token:-On your Nutshell CRM dashboard, click the Settings Option (with the gear icon under settings). It will be on the leftmost side of your dashboard.It will take you to your Account Settings.Under Account Settings, navigate to the API Tokens tab.Under the API Tokens tab, click on the Generate New Token button.Now enter a name for your API key and click the Generate button.Copy and paste the API key on BotPenguin.Step 3 of 4: Enter Authorization Details and establish connection with your AppAfter Filling Out The Details, Click Connect.Look For The Notification “Connected Successfully” For Confirmation.Also, your Nimble integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Nimble CRM and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and theNimble CRM you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Ontraport CRM , it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, and select the Bot you want to integrate with Nutshell CRM.Now, click the ‘Integrate’ tab.The

Integrate window will open up. Make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find Nutshell CRM by:-Either scrolling down the listOr by typing in ‘Nutshell CRM’ in the search box with the placeholder “search integration by name”Now click on the ‘connect’ button as shown below.Step 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenEmail AddressThe API Token:-Click the Profile Icon (with your photograph or Initials) on the bottom-left. In this menu, click on Company Settings.Here, navigate to the API tab under the Connections Tab.Under the API Keys tab, click on the Generate New API Key button with the ‘+’ symbol.Now, enter your desired name for your API Key.Check the API Access option under permissions.Now, click the New API Key button.Now, copy your API key and paste it onto BotPenguin.Email addressThe email address is the same as the one you signed up with on Nutshell CRM.You can also see it from your Nutshell CRM dashboard after clicking on the Profile Icon.For example, John@BotPenguin.comStep 3 of 4: Enter Authorization Details and establish connection with your AppAfter filling out the details, click Connect.Look for the notification “Connected Successfully” for confirmation.Also, your Nutshell CRM integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Nutshell CRM and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and the Nutshell CRM you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Nutshell CRM, it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, and select the Bot you want to integrate with OntraPort CRM.Now, click the ‘Integrate’ tab.The Integrate window will open up. Make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find OntraPort CRM. by:-Either scrolling down the listOr by typing in ‘OntraPort CRM’ in the search box with the placeholder “search integration by name”Now click on the ‘connect’ button as shown below.Step 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenApp IdThe API Token:-Click the Profile Icon (with your photograph or Initials) on the bottom. In this menu, click on Administration.Here, navigate to the Integrations tab.Under the Integrations Tab, Click on the On Ontraport Api Instructions And Key Manager Tab.Under the API tab, click on the New API Key button with the ‘+’ symbol.The New Key option will direct you to a new window. HereEnter your desired name for your API Key on the top-left.Check all the options for the given checklist for permissions.Select the Contact Owner as Yourself (It will show as Me in this instance).Now, click on Save.Now, copy your API key and paste it onto BotPenguin.APP IDThe APP ID will also be available on the API key wizard on OntraPort CRM.After you create a New API key, Your APP ID will also be visible beside your API key.Copy your APP ID and paste it on BotPenguin.Step 3 of 4: Enter Authorization Details and establish connection with your AppAfter Filling Out The Details, Click Connect.Look For The Notification “Connected Successfully” For Confirmation.Also, your OntraPort CRM integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and OntraPort CRM and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and the OntraPort CRM you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to HubSpot, it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Integrate BotPenguin with HubSpot:-Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, select the Bot you want to integrate with Hubspot.Now, click the ‘Integrate’ tab.The integrate window will open up. Make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find Hubspot by:-Either scrolling down the listOr by typing in ‘Hubspot’ in the search box with the placeholder “search integration by name”Now click on the ‘connect’ button as shownStep 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-API TokenThe API Token:-Click on the Profile Icon on your Hubspot dashboard. In this menu, Click On Profile and Preferences.Under Settings, navigate to the Account Setup Tab.Under the Account Setup Tab, expand the menu by clicking on the Little triangle on the right side.Now, Click on the Integrations Tab.In The Integration Menu, Click On Private Apps.Now click on the Create a Private App button.A Setup Wizard will open up. Here,Under the Basic Info Tab:Enter your desired name for the integrationEnter your desired description for the integrationYou can upload a logo if you wantNow switch to the Scopes Tab. Here:Click on the CRM tab in the given menu to expand the permissions list.Select the permissions as shown belowAfter selecting the permissions, click on the Create App button.Click on the Continue Creating button on the prompt after you click the create button.PermissionsNow your private app is live.In The Details Tab:-Click on the Show token buttonNow click on the Copy buttonCopy your token and paste it back on BotPenguin.Step 3 of 4: Enter Authorization Details and establish connection with your AppAfter filling out the details, click Connect.Look for the notification “Connected Successfully” for confirmation.Also, your HubSpot integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and HubSpot and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and in the HubSpot you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to HubSpot, it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Integrate BotPenguin with WebHoper:-Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, select the Bot you want to integrate with WebHoper.Now, click the ‘Integrate’ tab.The integrate window will open up. Make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find WebHoper by:-Either scrolling down the listOr by typing in ‘WebHoper’ in the search box with the placeholder “search integration by name”Now Click On The ‘Connect’ button As Shown Below.Step 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-Webhoper DomainCompany NameLead SourceDivisionEnter PasswordTo obtain these details, please contact the WebHoper Team at info@webhopers.comStep 3 of 4: Enter Authorization Details and establish connection with your AppAfter Filling Out The Details, Click Connect.Look For The Notification “Connected Successfully” For Confirmation.Also, your WebHoper integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and WebHoper and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and in the WebHoper you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to WebHoper, it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials are accurate. Kindly check credentials like:Webhoper DomainCompany NameLead SourceDivisionFree plan- You are not subscribed to the paid plan on BotPenguin as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Integrate BotPenguin with EngageBay:-Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, and select the Bot you want to integrate with EngageBay.Now, click the ‘Integrate’ tab.The Integrate window will open up. Make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find EngageBay by:-Either scrolling down the listOr by typing in ‘EngageBay’ in the search box with the placeholder “search integration by name”Now click on the ‘connect’ button as shown below.Step 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenThe API Token:-Click the Profile Icon (with your photograph) to toggle a menu. In this menu, click on Account Settings.it will take you to your Account Settings.Here, navigate to the API and Tracking Code tab.Now copy the REST API key and paste it on BotPenguin.Step 3 of 4: Enter Authorization Details and establish connection with your AppAfter filling out the details, click Connect.Look for the notification “Connected Successfully” for confirmation.Also, your EngageBay integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and EngageBay and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and the EngageBay you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Engagebay, it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Integrate BotPenguin with Frontapp:-Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, and select the Bot you want to integrate with Front CRM.Now, click the ‘Integrate’ tab.The Integrate window will open up. Make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find Front CRM by:-Either scrolling down the listOr by typing in ‘Front CRM’ in the search box with the placeholder “search integration by name”Now click on the ‘connect’ button as shown below.Step 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenThe API Token:-Click the Settings button (The Gear Icon) next to your profile icon on your Front dashboard.It will take you to your Admin Settings. Make sure you are in the company Admin settings.Here, click on the ‘Plugins and API’ tab.Now, navigate to the ‘API’ Tab.Here copy your API key and paste it on BotPenguin.Step 3 of 4: Enter Authorization Details and establish connection with your AppAfter filling out the details, click Connect.Look for the notification “Connected Successfully” for confirmation.Also, your Front integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Frontapp and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and in the Frontapp you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Frontapp, it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Integrate BotPenguin with Copper:-Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, and select the Bot you want to integrate with Copper.Now, click the ‘Integrate’ tab.The Integrate window will open up. Make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find Copper by:-Either scrolling down the listOr by typing in ‘Copper’ in the search box with the placeholder “search integration by name”Now click on the ‘connect’ button as shown below.Step 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenEmail addressLead TitleThe API Token:-Click the settings button (the gear icon) on the left-most side of your Copper Dashboard.it will take you to your account settings.Here, navigate to the Integrations tab, and click the little triangle on the right side to expand the menu.Now click on API KeysTo obtain your API key, click on the Generate API Key button.Copy your API Key and paste It on BotPenguin.Email Address:-This email address will be the same one you use on your Copper Account.The format will be name@company_domainExample:- xyz@apple.comLead Title:-The lead title is your choice. You can name your lead anything you want.For Ex:- Pipedrive test lead.Step 3 of 4: Enter Authorization Details and establish connection with your AppAfter filling out the details, click Connect.Look for the notification “Integrated Successfully” for confirmation.Also, your Copper integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Copper and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and the Copper you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Copper , it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Integrate BotPenguin with Salesflare:-Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, select the Bot you want to integrate with Salesflare.Now, click the ‘Integrate’ tab.The integrate window will open up. Make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find Salesflare by:-Either scrolling down the listOr by typing in ‘Salesflare’ in the search box with the placeholder “search integration by name”Now Click On The ‘Connect’ button As Shown Below.Step 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenLead TItleClick on the Gear Icon on your Salesflare Dashboard on the leftmost side. In this menu, scroll down and click on API Keys.Under the API Keys tab, click on the ‘+’ button to generate a new API key. Enter a name for Your API key and click Create.Copy and paste the API key back on BotPenguinLead Title:-The Lead Title Is Your Choice. You Can Name Your Lead Anything You Want. For Ex:- Salesflare test lead.Step 3 of 4: Enter Authorization Details and establish connection with your AppAfter filling out the details, click Connect.Look for the notification “Connected Successfully” for confirmation.Also, your Salesflare integration will show the message Installed in the integration list.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Salesflare and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and the Insightly CRM you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Salesflare it may be due to multiple reasons:Wrong Authorization Details added- You need to check and see if all the authorization credentials, such as API Token, API key, and URL, have been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin, as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, and select the Bot you want to integrate with No CRM.Now, click the ‘Integrate’ tab.The Integrate window will open up. Make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find No CRM by:-Either scrolling down the listOr by typing in ‘No CRM’ in the search box with the placeholder “search integration by name”Now click on the ‘connect’ button as shown below.Step 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenNo CRM DomainLead TitleThe API Token:-Click on the Profile Icon on your No CRM Dashboard on the leftmost side. In this menu, click on Admin Settings.Under Admin Settings, navigate To Integrations and click on API.Under the API tab, click on the API keys tab. Click on the Create API key button.Enter a name and description for your API key and click Save.Copy and paste the API key back on BotPenguin.No CRM Domain:-To obtain the No CRM Domain, login into your No CRM account. Navigate to your browser search bar, copy the address from there, and paste it into the BotPenguin interface.Lead Title:-The lead title is your choice. you can name your lead anything you want. For example:- No CRM test lead.Step 3 of 4: Enter Authorization Details and establish connection with your AppAfter filling out the details, click Connect..Look for the notification “Integrated Successfully” for confirmation.Also, your No CRM integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and No CRM and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and the No CRM you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to No CRM, it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Integrate BotPenguin with Helprace:-Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, and select the Bot you want to integrate with Helprace.Now, click the ‘Integrate’ tab.The Integrate window will open up. Make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find Helprace by:-Either scrolling down the listOr by typing in ‘Helprace’ in the search box with the placeholder “search integration by name”Now click on the ‘connect’ button as shown below.Step 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenHelprace DomainEmail AddressThe API Token:-Click on the Gear Icon on your Helprace Dashboard on the leftmost side. In this menu, scroll down and click on API Under Integrations.Under the API tab, click on the Generate API Key button. Enter a name for Your API key and click Save.Copy and paste the API key back on BotPenguinHelprace Domain:-To obtain the Helprace Domain, login into your Helprace account. Navigate to your browser search bar, copy the address from there, and paste it into the BotPenguin interface.Email Address:-This email address will be the same one you use on your Helprace Account.The format will be name@company_domainExample:- xyz@apple.comStep 3 of 4: Enter Authorization Details and establish connection with your AppAfter filling out the details, click Connect.Look for the notification “Integrated Successfully” for confirmation.Also, your Helprace integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Helprace and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and the Helprace you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Helprace it may be due to multiple reasons:Wrong Authorization Details added- You need to check and see if all the authorization credentials, such as API Token, API key, and URL, have been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin, as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Integrate BotPenguin with Flowlu:-Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, and select the Bot you want to integrate with Flowlu.Now, click the ‘Integrate’ tab.The Integrate window will open up. Make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find Flowlu by:-Either scrolling down the listOr by typing in ‘Flowlu’ in the search box with the placeholder “search integration by name”Now click on the ‘Connect’ button as shown below.Step 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenFlowlu DomainLead TitleThe API Token:-Click on your Profile Icon on your Flowlu Dashboard. In this menu, Click on Portal Settings.Under the Main Settings tab, navigate to the API Settings tab.Now, click on the Create button on the top-left.Under the Create Window,Enter your desired name for your API key.Check the CRM option under the Applications tab.Click on Save.Copy Your API key and paste it onto BotPenguin.Flowlu Domain:-To obtain the Flowlu Domain, login into your Flowlu account. Navigate to your browser search bar, copy the address from there, and paste it into the BotPenguin interface.Lead Title:-The lead title is your choice. you can name your lead anything you want. For example:- Flowlu test lead.Step 3 of 4: Enter Authorization Details and establish connection with your AppAfter filling out the details, click Connect.Look for the notification “Integrated successfully” for confirmation.Also, your Flowlu integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Flowlu and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and the Flowlu you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Flowlu, it may be due to multiple reasons:Wrong Authorization Details added- You need to check and see if all the authorization credentials, such as API Token, API key, and URL, have been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin, as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Integrate BotPenguin with Pipeline:-Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, and select the Bot you want to integrate with Bitrix24.Now, click the ‘Integrate’ tab.The Integrate window will open up. Make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find Bitrix24 by:-Either scrolling down the listOr by typing in ‘Bitrix24’ in the search box with the placeholder “search integration by name”Now click on the ‘connect’ button as shown below.Step 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenApp KeyThe API Token:-Click on the Profile Icon on your Pipeline Dashboard on the leftmost side. In this menu, click on Account Settings.Under Admin Settings, scroll down to the Other Tab and click on API Integrations.Under the API tab, click on the API keys tab. Enable your API access by clicking on the “Enable API Access” button if it is disabled.Now copy your API key and paste it back on BotPenguinAPP key:-Under the API tab, click on the API Integrations tab. Click on the ‘Add Integration’button to add BotPenguin Integration.Fill out the following fields as shown below and click on the create API Integration button.Copy your APP key and paste it back on BotPenguinStep 3 of 4: Enter Authorization Details and establish connection with your AppAfter filling out the details, click ConnectLook for the notification “Connected Successfully” for confirmation.Also, your Pipeline integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Pipeline and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and the Pipeline you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Pipeline , it may be due to multiple reasons:Wrong Authorization Details added- You need to check and see if all the authorization credentials, such as API Token, API key, and URL, have been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin, as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Integrate BotPenguin with Zingtree:-Step 1 of 4: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account, and select the Bot you want to integrate with Zingtree.Now, click the ‘Integrate’ tab.The Integrate window will open up. Make sure you are in the “All Integrations Tab.”A list of all native integrations for BotPenguin will be available in this window.Now find Zingtree by:-Either scrolling down the listOr by typing in ‘Zingtree’ in the search box with the placeholder “search integration by name”Now click on the ‘connect’ button as shown below.Step 2 of 4: Find your Authorization Key/Token in App AccountTo complete the process, you need to fill out:-The API TokenThe API Token:-Click the Account Tab on your Zingtree Dashboard. In this menu, click on Organization & Billing.Here, navigate to the API & Data tab.Now copy your API Key from the API & Data tab and paste it on BotPenguin.Step 3 of 4: Enter Authorization Details and establish connection with your AppAfter filling out the details, click Connect.Look for the notification “Integrated Successfully” for confirmation.Also, your Zingtree integration will show the message Installed in the Integration List.Step 4 of 4: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Zingtree and complete the mapping, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard and the Zingtree you have integrated.Still Not Working, Let’s Troubleshoot!If you are not getting dummy leads from your Bot to Zingtree , it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as API Token, API key, and/or URL has been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only with the paid plan.If everything is correct and you cannot move forward, write to us at contact@BotPenguin.com. We will respond within 48 business hours.

Step 1 of 5: Login to BotPenguin Account and Select Application to IntegrateLogin to your BotPenguin account. Now, select and click the Bot you want tointegrate with Salesforce. Click on the ‘Third-Party Apps Integration tab.’b. The Integrate window will Open up. Select the ‘Third-Party Apps’ Tab.c. A list of all native integrations for BotPenguin will be available in this window. d. Now find Salesforce by:-Either by scrolling down the list or,by typing ‘Salesforce’ in the Search Box with the placeholder “Search Integration By Name”e. Now click on the ‘Connect’ button as shown f. An Interface, as shown below, will open up. Here, you will asked to submit the following detailsDomainClient IDClient SecretStep 2 of 5: Find your Authorization Key/Client Secret in Salesforce CRM Accounta. To get the Client ID and Client Secret, login to your Salesforce developer account. Click on the Settings icon on the top-right. Quick find “connected apps”. Click ‘Manage Connected Apps’ tab.c. Click on the pre-created Appd. Go to ‘Apps Manager’ and

click on your Appe. Verify the Salesforce account again.b. You will find the Client ID and Client Secret Token. The Domain will be the URL here.Step 3 of 5: Enter Authorization Details and establish connection with your CRMEnter the Salesforce Domain, Client ID and Client Secret and click the 'Connect' button to complete integration of BotPenguin with Salesforce..2. If you have entered all the details correctly, you will be redirected to Salesforce login to verify again.Step 4 of 5: Set up Mapping ParametersNow, as the connection of the BotPenguin and Salesforce CRM is established, you need to map parameters(fields) of Salesforce CRM to the user response to the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name. Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user's response from BotPenguin to the Salesforce CRM's Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Salesforce CRM fields.Please note that these queries/questions options will be auto-fetched from your bot chat flow, So, make sure you configure your chat flow first.c. If you have entered all the details correctly, you will see a notification that says "Mapping successfully."d. Also, your Salesforce integration will show the message Connected in the Integration List.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Salesforce CRM, and the mapping is complete, you are ready to go for your first test lead. Click the 'Test Lead' tab to test your integration setup by creating a dummy lead on the bot. This lead should appear in your Salesforce CRM that you have integrated.Still Not Working, Let's Troubleshoot! If you are not getting dummy leads from your Bot to Salesforce CRM, it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as Domain, Client ID and Client Secret have been entered correctly.Wrong Mapping Set up - Your mapping with BotPenguin Question and CRM parameter is either incorrect or you haven't added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in paid plan.If everything is correct and you are still unable to move forward, write to us at contact@BotPenguin.com. We will respond back within 48 business hours.
Login to your BotPenguin account. Now, select and click the Bot you want to integrate with Chakra CRM. Click on the 'Third-Party Apps Integration tab.'b. The Integrate window will Open up. Select the 'Third-Party Apps' Tab.c. A list of all native integrations for BotPenguin will be available in this window. d. Now find Chakra by:-Either by scrolling down the list or,by typing 'Chakra' in the Search Box with the placeholder ~Search Integration By Name~e. Now click on the 'Connect' button as shown f. An Interface, as shown below, will open up. Here, you will be asked to submit'API Token'.Step 2 of 5: Find your Authorization Key/API Key in Chakra CRM AccountTo get the API key, login to your Chakra CRM account, and click on 'Admin' tab on the left side panel.b. Scroll down to find the API keys tab and click it.c. Select the API key created for the bot integration.c. Your Access Token is the API key. Copy it and save.Step 3 of 5: Enter Authorization Details and establish connection with your CRMa. Enter the API Token and click the 'Connect' button to connect BotPenguin with Chakra CRM.b. If you have entered all the details correctly, you will see a notification that says "Connected Successfully."Step 4 of 5: Set up Mapping Parametersa. Now, as connection of the BotPenguin and Chakra CRM is established, you need to map parameters (fields) of Chakra CRM to the user response to the BotPenguin question.You can use the +Add Parameters button to add more fields.For example, you select a question from All bot questions/components: Please provide your name.Then, you map it with the parameter -NameAs a result, this mapping will enable integration to send the user's response from BotPenguin to the Charkra CRM's Name field in the leads. Similarly, in order for integration to work properly, you will require to map all other questions/ components of your Bot to Chakra CRM fields.Please note that these queries/questions options will be auto fetched from your bot chat flow, So, make sure you configure your chat flow first.c. If you have entered all the details correctly, you will see a notification that says "Mapping successfully."d. Also, your Chakra integration will show the message Connected in the IntegrationList.Step 5 of 5: Test your Integration Set up with DataOnce you have established a connection between BotPenguin and Chakra CRM, and the mapping is complete, you are ready to go for your first test lead. Click the 'Test Lead' tab to test your integration setup by creating a dummy lead on the bot. This lead should appear in your Chakra CRM that you have integrated.Still Not Working, Let's Troubleshoot! If you are not getting dummy leads from your Bot to Chakra CRM, it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials such as Domain, Client ID, and Client Secret have been entered correctly.Wrong Mapping Set up - Your mapping with

BotPenguin Question and CRM parameter is either incorrect or you haven't added any mandatory parameter.Free plan- You are not subscribed to the paid plan on BotPenguin as integration works only in the paid plan.If everything is correct and you are still unable to move forward, write to us at contact@BotPenguin.com. We will respond back within 48 business hours.
Access Your BotPenguin AccountLog in to your BotPenguin account and select the bot you wish to integrate with SimplyBook.Navigate to Third-Party App IntegrationsGo to the "Third-Party App Integrations" section in your BotPenguin account.Search for "SimplyBook" in the available integrations list.Initiate the ConnectionOnce you've found SimplyBook, click on the "Connect" button to begin the integration process.Enter SimplyBook Account CredentialsIn the fields provided, input the required details such as "Company Name," "Login ID," and "Password."Make sure these credentials match those used for your SimplyBook account to ensure a successful connection.Map Services and ProvidersAfter entering the credentials, you will need to map the services. Provide the service names and ensure that both the service and provider names match exactly as they are listed on your website for accurate mapping.Save and UpdateOnce the mapping is complete, click on the "Save" button followed by the "Update" button to finalize the integration.Integration CompleteYour integration is now successfully completed. You can now view client bookings and appointments directly on your SimplyBook account, with all the relevant details filled in automatically.
Why Use Pabbly with BotPenguin?Pabbly enables seamless automation by allowing you to send leads captured in BotPenguin to other applications. For instance, you can use it to automatically add new leads to a Google Sheet for better organization and tracking.Steps to Integrate Pabbly with BotPenguin1. Set Up Integration in BotPenguinLogin to BotPenguinAccess your BotPenguin account.
Select Your BotNavigate to the bot you want to integrate with Pabbly.
Third-Party App IntegrationGo to the "Third-Party App Integration" section.Search for "Pabbly" in the available integrations list.

This guide provides step-by-step instructions on how to integrate Pabbly with BotPenguin to collect leads captured on BotPenguin and transfer them to a third-party application, such as Google Sheets.Fill in the WebhookYou will need to paste the webhook URL provided by Pabbly in this section.
2. Generate a Webhook in PabblyLogin to PabblyAccess your Pabbly account and go to the dashboard.Create a New FlowClick on the "Create Workflow" or "Create Flow" button.Provide a name for the workflow.

Set the TriggerSearch for "BotPenguin" in the trigger app list.
Select the event, such as "New Lead."

Copy the Webhook URLPabbly will generate a webhook URL after selecting the trigger event.Copy this webhook URL.

3. Complete Integration in BotPenguinPaste the WebhookGo back to the "Third-Party App Integration" section in BotPenguin.Paste the copied webhook URL into the Pabbly integration field.

Save ChangesClick the "Update" or "Save" button to confirm the integration.4. Test the IntegrationInstall the Bot for TestingNavigate to the "Install Your Website Chatbot" section in BotPenguin.
Copy the chatbot script code.
Paste the script into a testing platform like W3Schools.Run a Test InteractionInteract with the bot to create a lead (e.g., by submitting a form).
Check if the lead is captured and sent to Pabbly.
5. Send Data to a Third-Party Application (e.g., Google Sheets)Set the Action App in PabblyAfter the trigger (new lead), select the action app, such as "Google Sheets."
Configure the Action EventChoose the action event, such as "Add New Row."Select the target spreadsheet and the specific sheet where you want the data to be stored.
Test and SaveClick "Save and Send Test Request" in Pabbly.
Verify that the data has been successfully saved in the Google Sheet.

Access Your BotPenguin AccountLog in to your BotPenguin account and select any whatsapp or website bot you wish to integrate with Zoho CRM.Navigate to Third-Party App IntegrationsGo to the "Third-Party App Integrations" section in your BotPenguin account.Search for "Zoho CRM" in the available integrations list.Initiate the ConnectionOnce you’ve found Zoho CRM, click on the "Connect" button to begin the integration process.Select your Zoho domain according to your regionCopy the Webhook URL.Now, open sign in to your Zoho CRM account and click on settings option on the top right corner. After clicking on settings, go to automation and click on Workflow Rules as shown above.Now inside Workflow Rules click on create rule to add a new rule.Now Create a new rule and select "Leads" in module and enter your Rule name and Description as per your requirements.After filling all the details click on next. And start setting up the rule.Now select "Record Action" for execute this workflow rule based on, as shown above.Now select other field as "create or edit" and click on the checkbox and then click next.Now select "All Leads" for applying the rule to and click on next.Now select "Webhook" in instant actions as shown above.Now a pop will be opened for editing webhook. Type the name you want to give to the webhook and its description according to your requirements.And select method as "POST" from the drop down.And paste the Zoho CRM Web-hook URL copied earlier from Botpenguin. And select "General" in authorization type.Now go back to Botpenguin and click on more and select "developers". Inside Developers, select "Access Token" and copy the token as shown above. Now go back to Zoho and scroll down and fill Custom Parameters as shown above. Enter the parameter name as "authtype" and parameter value as "Key". And click the "+" icon. Enter the parameter name as "Authorization" and parameter value as "Bearer and paste the Access Token copied from developers in Botpenguin". Now select Type as "Raw" and format as "JSON" in body. And type

```
{
"leadId":"#"
}
```

in the body. Now select the same merge field as shown above. Now click on "Save" Now you see your Rules for the Workflow have been created. Keep the toggle button ON to use them. Now go back to Botpenguin and go to Third party integrations and search Zoho CRM and click on edit. Inside it you can map the question with parameter. After that click on Save. You can also toggle the "Sync Leads" , "Sync Attributes" and "Sync Tags" which can be mapped with attributes.If you integrated for Whatsapp Bot, "Send Template To Leads" will also be visible and you can configure that too. To send selected message templates to leads.Your integration is now successfully completed.

Zapier is an automation tool which helps making a connecting between apps. You can set BotPenguin and apps in zapier as triggers and actions.Steps to use Botpenguin with ZapierLog in to your BotPenguin account and select a bot you wish to integrate with Zapier.Go to the "Third-Party App Integrations" section.Search for "Zapier" in the available integrations list. And click on connect.Then go to Zapier website.Here you can see all the supported Triggers and Actions that are available to be used with Botpenguin. Then click on "My Zaps" on the top right corner.Click on "+ Create" button to use the supported triggers and actions.Select "New Zap".You will land up on canvas where you can set triggers and their actions.Click on "Trigger" to select your trigger app. Select BotPenguin from the list as trigger.Then select a trigger event from the list of available events.After that click on "Sign In" to connect botpenguin. When you click on sign in, a pop will be opened to give zapier access to your botpenguin account.Select the platform / bot channel for which you want to use zapierThen enter the API Key which is available in Developers section inside Access Token in Botpenguin. Then enter the Bot Id, you can click on "edit" in Zapier Integration Page to get Bot Id for the same. And click "Yes Continue with Botpenguin".Then select an Action Event app (here we have selected google sheets).Then select an Action Event which is available for the same.Also test your Tigger event.And click on "Continue".Then configure your Action Event.As we have selected Google Sheets here, we have to configure accordingly. Select the Google Drive where you want to store the changes in.Select the Spreadsheet in which you want to add.Select the Sheet in which you want to add.Can also specify the rows for the same. Then click on "Test Step" or you can also skip test if you want.Then finally click on "Publish" to save all the changes and implement the triggers and actions.Your Zapier integration is live and ready to work.Similarly you can use other apps as TRIGGERS and Botpenguin as ACTIONIf everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

You can connect BotPenguin with Make.com to automate the lead details.The following TRIGGERS can be set in Botpenguin:Watch New Contact Created -> This will be trigger when a new contact is created on BotPenguin platform. Watch New Incoming Message -> This will be triggered when a new incoming

message is received on BotPenguin platform.Watch New WhatsApp Order placed -> This will be triggered when a new order on Whatsapp bot will be placed.   The following ACTIONS can be used in Botpenguin:Add a contact -> This will add a contact to your Botpenguin AccountSend Session Message -> This will send a message through your WhatsApp botSend Template Message -> This will send a template message through WhatsApp botUpdate Contact Attributes -> Updates user-specific custom attributes of a contact
How to use Botpenguin as TriggerLog in to your botpenguin account.Select the bot from the left panel which you want to integrate with Make.comThen click on "Third Party Apps Integrations". Inside the bot you have selected.Then search for "Make" in the search bar as shown below. And click on "Connect"You will get the "BotID" inside the "Make" Integration. Click on copy button that is in-front of the BotID.Then click on "Scenario" which will redirect you to the "Make.com" website. Click on "Create a new scenario" that is on top right of the screen.You can now click on the "+" icon in canvas and search for Botpenguin in the search bar.Select the trigger events for your bot to initiate the action. Here we have selected "Watch New Contact Created"Procedure for setting up other Botpenguin Triggers are same Select "New Contact Created Webhook" as you are creating it for the first time.
or
Choose from the available Webhooks if you have created it earlier. Then click on "OK"Now you have to create a connection.Give your connection a name.Then enter the API Key from your Botpenguin account.(Follow instructions available below)Select the platform of the bot you are integrating with.Then paste the BotID which you copied earlier from Make.com third party integration in Botpenguin Then click on "Save" button and your Trigger is set.You can get API Key from the "Developers" section in Botpenguin. Then click on Access Token and copy the same. Then you have to add an action which will take place once event trigger takes place. Click on the "+" icon next to Botpenguin Bubble to add an action. Here we have used Google Sheets as action.Select the available events which are available on google sheet.Then select the google spreadsheet which you want to store the data into. Click on the choose file.Select the sheet for the same and set up the table content. You can select the values and attributes which you want to map in your sheet according to the column and row.Click on OK and save the settings made.On the top right you can see a toggle button which should be turned "ON" for your integration to work.Then go to Botpenguin and select the bot which you were integrating with Make.comSelect the Flow which you want to use. Click on "Test Live On WhatsApp Web". Then chat with the bot and provide the inputs asked.You can check your given google sheet, all the leads collected will be stored there.Remember that the contact info entered should not be available on Botpenguin platform previously. As it will be considered as revisit lead and will not be triggered by botpenguin app in Google sheet or any other app which is used as an action.How to use Action in BotpenguinGo on Make.com website and create a new scenario.Select a Trigger app by clicking on the "+" icon. Here we have selected "Google Sheets".Then select an available Trigger events from the given options. Then setup your google sheet by filling all the required details from where you want to set trigger and fetch data for the action to take place.After completely setting up your Trigger.Click on "+" icon next to the trigger. Search for Botpenguin and select an Action event which will take place after receiving the trigger. Set up connection by providing the API key and BotID from botpenguin as explained above.If you have previously made a connection you will just need to select the bot and Whatsapp number in case of the action being triggered by a WA bot. Click on "OK" and save the changes. Remember to turn "ON" the integration that you have created. You have successfully connected Botpenguin as action. Once a trigger takes place your bot will follow the action.You can also check all your connections in "connection" tab in the Make.com. Here you can see the Email ID which you have connected and the Bot name which is mapped for the automation. Here as we have selected "Send Template Message" as action. After receiving the leads data in google sheet. Whatsapp bot sent the template message on the provided phone number.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours. BotPenguin My Integrations feature enables you to make a custom integration with your App and BotPenguin. Here are detailed instructions for you.Custom Integration GuideFollow below steps to create the integration between your app and BotPenguin1. Navigate to the BotPenguin My Integration SectionLogin to BotPenguin Dashboard and open the Third-Party Apps Integrations .Navigate to the My Integration tab under Third-party Apps Integration and click on Add Integration button.2. Create New IntegrationFilled the basic integration details such as Name of the integrationLogo of your appDescriptionOnce you have filled in basic details, Enter the API URL which creates the lead, tasks, or

ticket in your app, depending on your use case. Define API Method and enter the request body, or you can also define the API parameter and header one by one. Add the header keys if there is a need to do so. You can find option in the bottom to add the Validate your request using the Validate button.3. Map your bot questions with API body parameterOnce you have filled in all the details, You will require to map your bot questions to the API Parameters. You can add new parameters from the option available on top. For example, you select a question from Question: Please provide your name?Then, you map it with the parameter - NameAs a result, this mapping will enable integration to send the user's response from BotPenguin to your app's Name field in the leads. Similarly, for integration to work correctly, you will require to map all other questions/ components of your Bot to your app's field.Please note that these queries/questions options will be auto fetched from your bot chat flow, So make sure you configure your chat flow first.Once done, Save your integration and run a test. 4. Test your Integration Set up with DataOnce you have established a connection between BotPenguin and your app, you are ready to go for your first test lead. You can test your integration setup by creating a dummy lead on the bot. This lead should appear in your BotPenguin dashboard as well as in the app you have integrated.Not Working, Let's Troubleshoot!If you are not getting dummy leads from your Bot to your app, it may be due to multiple reasons:Wrong Authorization Details added- You will be required to check and see if all the authorization credentials, such as API Token, API key, and/or URL, have been entered correctly.Free plan- You are not subscribed to the paid plan on BotPenguin, as integration works only in a paid plan.If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.

As users interact with your chatbot, it's crucial to keep track of every conversation. This document will cover all the features of the Inbox that you need to effectively manage user chats.To manage your chatbot, you need to first visit the BotPenguin Dashboard: https://app.botpenguin.com/homeClick on "Inbox" to view all the chats.You can view all the chats across all your chatbots here.You can select any chat you want by clicking on icon.Status: You can assign status to any specific chat like Inprogress, Reviewed or Closed. You can also create your own status according to your requirements.You can assign a status by selecting it from the dropdown menu.You can mark the status of any chat as "Closed" by either selecting it from dropdown menu or clicking on the marked button.Create Status: Click on Create status to start creating new status.Here you can see all your status you have created. Click on "Create Status".Enter Status Name and select the status color code Then click on "Create Status".Assign: You can assign any chat to any of your agents. Assigned agent will have the entire access for this chat.You can assign a status by selecting it from the dropdown menu or by clicking the marked button.Create Agent: Click on Create Agent to start creating new agentHere you can see all your team members.Click on "Add Team Member" to start adding new team member.Enter all the details of your team member.Select Lead Visibility: Select whether you want to give access to all chats or only to assigned chats.Select Lead Reassign Permission:TagsYou can add tag to any chat by selecting from dropdown menu or by clicking the marked button.You can export the entire data by clicking on the below marked button.Filter: You can apply filters to view the leads according to your requirements.Orders: Click on "Orders" to view all your orders.You can assign "Status" and "Tag" to your orders.Contacts: You can view all your Leads/Contacts here.Contacts: Contacts are the new customers who have shared their contact information during a chat with the bot.Groups: You can group your leads.You can view all your groups you have created here.Create GroupEnter Group Name.Then select the filter and all the contacts that fall under this filter criteria will be added.You can also assign leads to any specific group.Select the group using the dropdown menu.

Chat Section Overview - Omni-channel InboxThe chat section provides a unified view of all user interactions with the bot across various platforms. Here's how to navigate it:User Information:Displays columns for User Name, Phone Number, and Email for easy identification.Tag Assignment:You can assign tags to specific chats.To create a new tag, click on the "Create Tag" button available in the dropdown menu.Assign Live Agent:Assign a live agent to handle specific chats.If you need to add a new agent, use the "Create Agent" button in the dropdown menu.Chat Status:Assign a status to each chat.Create new status via the "Create Status" button in the dropdown menu.Actions:The action column contains buttons to Call, Delete, or Copy a user's chat for further reference.Chat Window Features When you open a specific chat, several useful tools and information are available to manage conversations efficiently:Top Navbar Tools:Chat Translation:Instantly translate the chat into your preferred language with the Translate button.Transfer Chat:Transfer the current chat to another agent using the Transfer

button.Download Chat Transcript:Download the entire chat history by clicking on the Download Transcript button.Tag and Status Assignment:Assign tags and status to the chat directly from this window. You can also create new tags or status using the provided options in the dropdown menus.Quick RepliesVisitor Profile (Left Sidebar):The Visitor Profile section provides key details about the user interacting with the bot, including:NameLocationPhone NumberEmailAny custom attributes you've created, like preferences or additional details.Using Filters in the Inbox PanelThe inbox panel provides various filters to help you segregate chats according to your needs. You can apply different filters to organize and manage your inbox efficiently.Available Filters:
Use filters based on parameters such as tags, status, assigned agent, and more to narrow down specific chats.How to Apply Filters:
Simply select the desired filter from the dropdown menu in the inbox panel, and the relevant chats will be displayed accordingly.This feature makes it easier to sort and manage your chats based on specific criteria.
Orders Section - WhatsApp CatalogueThe Orders section displays all orders placed via the WhatsApp Catalogue. It includes the following details:User Information:Columns for User Name, Phone Number, and Email to easily identify the customer.Item Count:Displays the quantity of items in each order.Total Amount:Shows the total value of the order in the Total column.Tags:You can assign tags to an order.To create a new tag, click on the "Create Tag" button in the dropdown menu.Status:Assign a status to each order to track its progress.New statuses can be created by clicking on the "Create Status" button in the dropdown menu.
The contacts section provides a unified view of all user interactions with the bot across various platforms and have either provided the phone number or email so that we can contact them in furure . Here's how to navigate it:User Information:Displays columns for Visitor Name, Phone Number, and Email for easy identification.Tag Assignment:You can assign tags to specific chats.To create a new tag, click on the "Create Tag" button available in the dropdown menu.Assign Live Agent:Assign a live agent to handle specific chats.If you need to add a new agent, use the "Create Agent" button in the dropdown menu.Chat Status:Assign a status to each chat.Create new status via the "Create Status" button in the dropdown menu.Actions:The action column contains buttons to Call, Delete, or Copy a user's chat for further reference.Chat Window Features When you open a specific chat, several useful tools and information are available to manage conversations efficiently:Top Navbar Tools:Chat Translation:Instantly translate the chat into your preferred language with the Translate button.Transfer Chat:Transfer the current chat to another agent using the Transfer button.Download Chat Transcript:Download the entire chat history by clicking on the Download Transcript button.Tag and Status Assignment:Assign tags and status to the chat directly from this window. You can also create new tags or status using the provided options in the dropdown menus.Visitor Profile (Left Sidebar):The Visitor Profile section provides key details about the user interacting with the bot, including:NameLocationPhone NumberEmailAny custom attributes you've created, like preferences or additional details.Using Filters in the Inbox PanelThe inbox panel provides various filters to help you segregate chats according to your needs. You can apply different filters to organize and manage your inbox efficiently.Available Filters:
Use filters based on parameters such as tags, status, assigned agent, and more to narrow down specific chats.How to Apply Filters:
Simply select the desired filter from the dropdown menu in the inbox panel, and the relevant chats will be displayed accordingly.This feature makes it easier to sort and manage your chats based on specific criteria.
Groups Section In the Groups section, you can create and manage groups of contacts to keep similar types of contacts organized in one place.Purpose of GroupsGroups are primarily used to assemble similar types of contacts in one place for easy management. This feature is particularly useful for organizing contacts, applying group-specific actions, and filtering contacts. Below are the steps to create and manage groups effectively:How to Create a GroupNavigate to the Groups Section: Go to the "Groups" tab from your dashboard.Click on the "Create Group" Button: On the right side of the page, you'll find the Create Group button. Click on it.Enter Group Name: A page will appear where you can enter the desired group name.Add Contacts: After naming the group, you can start adding contacts to the group by using the filters options.Save the Group: Once you've added the necessary contacts, save the group, and it will be created.Features in the Groups SectionFilters: You can use filters in the Groups section to quickly find the group you need.Group Table: The Groups table displays key details, including

the group name, the total number of contacts in each group, and actions you can take on each group.Group ActionsEach group has an Actions button that allows you to:Edit the Group: Modify the group name or update the contact list.Download the Group: Export the group's contact list as a file.Delete the Group: Permanently delete the group if it is no longer needed.This feature allows you to efficiently manage large numbers of contacts with ease and flexibility.

This guide provides a comprehensive understanding of the following:What is the Live Chat Feature?How to Integrate the Live Chat Feature into Your Chatbot?How to User Queries via Live Chat?Let's start with understanding what is live chat?What is Live Chat Feature?The Live Chat feature in BotPenguin enables real-time interaction between your users and your support team. By integrating this feature into your chatbot, you can ensure that when users engage with the chatbot, their queries can be immediately addressed by an assigned agent. This feature enhances the user experience by providing instant support, improving customer satisfaction, and fostering a more personalized and responsive communication channel.How to Integrate the Live Chat Feature into Your Chatbot?To manage your chatbot, you first need to visit the BotPenguin Dashboard**:** https://app.botpenguin.com/homeTo manage your bot, select it from the left sidebar.Click on "Edit Your Chat Flow" to customize your chatflow.Click on "Live Chat" under Trigger Action.You will see Live chat component has been added.You can also customize this message as per your requirements.Manage Team:Click on "Manage Team" to view all your team members and roles you have created.You can add new team member by clicking on "Add Team Member".Click on "Roles" to view all the roles you have created.For more details about Team Members and Roles visit https://help.botpenguin.com/botpenguin-resource-centre/how-botpenguin-works/teamNow, select the message or question that will trigger the transition to Live Chat.In the "Go to next message", select the Live Chat component.How to User Queries via Live Chat?You will receive a notification popup whenever there is a new chat request.Click on "Inbox" to view all your chats.Select any chat to view the entire conversation between user and your chatbot.You accept the live chat request or either click on "Initiate Live Chat" to chat with user.Now you can type your message in a live conversation with your customer.

Analytics OverviewNow it's time to leverage the power of data. As you explore the Analytics Panel, you'll gain valuable insights into your bot's performance. In this, we will be covering:What is the Analytics Panel and Its Uses?How to Understand and Extract Valuable Information from This Data?Understanding These Complex TerminologiesLet's start with, What is Analytics Panel and how it is used:What is the Analytics Panel?The Analytics Panel is a powerful tool within BotPenguin designed to provide comprehensive insights into your chatbot's performance. It displays key data, including the total number of messages, total Whatsapp conversations, and the total number of leads generated from all your bots. By using the Analytics Panel, you can:Monitor the overall activity and engagement levels of your chatbots.Assess the effectiveness of your bots in generating leads.Identify trends and patterns in user interactions.Evaluate the performance of your chatbots on a daily, weekly, and monthly basis.Make data-driven decisions to optimize and improve your chatbots.The Analytics Panel is crucial for understanding the performance of your chatbots and for making necessary adjustments to improve their functionality and user experience.Here is the list of some complex terminologies you will find in this documentation:TermsMeaningLeadsLeads are the new customers who have shared their contact information during a chat with the bot.Paid ConversationsThe paid conversations are those that are initiated by the admin side.Free ConversationsThe free conversations are those that are initiated by the end user side.Current Billing CycleIt is the duration of your current plan.AI messagesTotal MessagesIn this document you'll find the Total number of messages, these are the messages that are sent by the chatbot and do not include messages from the end-user.Analytics PanelTo manage your chatbot, you need to first visit the BotPenguin Dashboard: https://app.botpenguin.com/homeInsightsMessages: Under this, you will see the total number of messages consumed by your account during this billing cycle.(Messages from WhatsApp, Telegram and Facebook bots are excluded)WhatsApp Conversations: Here you will see the total number of WhatsApp conversations consumed by your account during this billing cycle.AI Messages: Total number of AI messages consumed by your account during this billing cycle.Leads: Total leads generated during this billing cycle.Your BotsYou will be able to view all the

chatbots you’ve created, along with the messages and leads generated by each bot during this billing cycle. Additionally, you will have the option to edit or delete your bot from here.To access the Analytics panel, click on "Analytics" in the left sidebar.OverviewMessages: Total number of messages since the account was created.Leads: Total number of leads generated since the account was created.Analytics SummaryHere you can view the trends of the total number of messages and total leads generated by your bots.You can choose which bot’s trends to view. You can also select all bots to see the trends for the total number of messages and leads generated across all bots.You have the option to choose the duration: daily, weekly, or monthly.Bot-Wise AnalyticsYou can view the total number of messages and total leads generated by each bot.Choose the duration: Current Billing Cycle, Current Month, Since Account Creation.Now scroll down, to view WhatsApp AnalyticsTotal Conversations: It displays the total number of WhatsApp conversations between the chatbot and end users.Free Conversations: The Total number of conversations initiated by the end-user side.Paid Conversations: Total number of conversations which are initiated by the admin side.Messages Sent: Total number of messages sent by our WhatsApp chatbot but didn’t get delivered to the end user (Single tick on sent Whatsapp message).Messages Delivered: Total number of chatbot messages delivered to the end user (Double tick on Whatsapp).Conversation AnalyticsYou can view the trends of:Total ConversationsPaid ConversationsFree ConversationsYou can customize the durations and select which WhatsApp chatbot trends you need to see.WhatsApp Messages by StatusHere you will find the Messages sent vs Messages Delivered trend. You can select the chatbot and duration.WhatsApp MessagesHere also you can view the Messages sent vs Messages Delivered trend, but for every month, week and day.
BotPenguin allows you to onboard your team members, enabling better collaboration and management of your chatbots and enhancing the overall experience for your end-users.In this documentation, we’ll guide you through:How to Add More Team MembersWhat Are Roles and How to Create New RolesHow to Assign Leads to Your Team MembersThe Teams section allows you to add other team members to your platform and manage their roles, departments, and working hours. This section is divided into four main parts: DepartmentsBusiness hoursTeamRoleTo manage your Teams, you first need to visit the BotPenguin Dashboard**:** https://app.botpenguin.com/home
Note: The "Departments" feature is only accessible to users on the King Plan.In the Departments section, you can create and organize departments based on your needs. You can assign specific team members to a particular department.How to create Department:Navigate to the Departments section.Enter a name for the department in the Name field.Add a short description for the department, if needed.After filling in all the details click on the "Add Department" button.
Note: The "Business hours" feature is only accessible to users on the King Plan.The Business Hours subsection allows you to set your organization’s working hours, including specific days and shifts (like night shifts).How to set Business hours:Click on the "Create Business Hours" button to set business hours.Fill out the Name field and add a short description.Select the time zone and the business days.Choose the corresponding start and end times for each working day.If there is a night shift or additional shift, click on the + icon to create a second shift.Click Add Business Hours to save.
TeamsHere, you can view detailed information about all your team members and manage their roles and permissions.Status: If the status of a member is "active", the member can access the account. If the member is “inactive”, the member cannot access the account.Action: You can edit the roles and details of your team members. You can also remove team members from this section if needed.Role: You can see the role assigned to each team member from here.In this section, you can add team members to the platform and assign roles and permissions.How to add a Team MemberClick on the Add Team Member button as shown in the screenshot.Enter the team member’s details, such as name, email, and phone number.Choose a Role for the team member.Set Lead Visibility to define whether they can view all leads or only the ones assigned to them.Configure Lead Assignment Permissions based on the options provided.Create a password and set a profile icon for the team member.Click Add Team Member to finalize.Now, let’s explore how to create a new role and edit the permissions and details of your existing roles.
How to create a new RoleClick on the "Roles" panel to view and manage the roles you have created.Next, click on "Create Role" to start the process of creating a new role.Add “Name” and “Description” for your role.Assign Permissions: You can select the sections you want to allow or block users from accessing in this role.Read: It grants users access to only view the selected section.Write: ****It grants users access to make changes in the selected section.Delete: It allows users to delete

existing items within the selected section.Let’s illustrate this with an example in the Inbox —> Chats section:Read Access: Users can view all chats across all chatbots but cannot edit or delete them.Write Access: Users can view and edit any chat across all chatbots but cannot delete them.Delete Access: Users can view and delete any chat across all chatbots but cannot edit them.After giving the necessary permissions, proceed by clicking on "Create Role" located at the bottom.Your role will be created.Status: If the status of a role is "active", it can be assigned to any team member. If the role is “inactive”, it cannot be assigned to anyone.Action: You can edit or delete any of the existing roles from here.

Setting up Assign Chat logicsStep 1: Select a bot.Step 2: Click on "Edit your Chat Flow".Step 3: Inside canvas, search for "Assign Chat" and select the same to customize in your bot.Step 4: Customize "Assign Chat" by selecting an option to assign chat based on Department or based on Team Members.Step 5: Now select a department from the drop down.Step 6: Now select an Assignment Logic according to which chat will be assigned. Currently we have one option which is "Round Robin".Round-robin is the method used to distribute incoming conversations across a team. It automatically assigns conversations to selected coworkers on a cyclical basis. It basically rotates incoming conversations in the order they are received.Step 7: Select a checkbox which best suits you to filter out assignment rules. You can select "Do not assign to offline agents" and "Assign only in business hours". Step 8: Select "go to next message". And you are done setting up the assignment rules.

BotPenguin SubscriptionsBotPenguin is a SaaS-based chatbot provider platform where you can create a website bot, Live chatbot widget, Chatbot page, WhatsApp bot, Telegram bot, and Facebook bot. Currently, you can manage your subscription to bots from the BotPenguin Dashboard, except for WhatsApp, which is handled offline. Here is how you can manage your subscriptions. You have options here, want to read or watch?If you want to watch, be our guest Otherwise, read on.

Price of each BotPenguin subscription plans:

Baby plan : Rs 0 (free of cost)

Little plan : Rs.1200

King plan : Rs.4500

Emperor plan : Customise of your own.

Current SubscriptionCheck your current subscriptions from the subscriptions panel. You can access the same by clicking on the Subscriptions in the left side menu bar and then selecting the Subscriptions tab in the top menu bar as shown in the image below. Here you can see all of your current subscription details.Upgrade your planYou can upgrade your plan in a few quick steps; here is how:Step 1: Navigate to the Subscriptions panel from the left menu bar and then go to the Plan tab. Step 2: Once you can see the screen similar to above, a. Select whether you want to purchase the Monthly or yearly plan from the top left. You will get two months FREE in the yearly plan.b. Select the number of messages you want to consume monthly from the message slider bar.c. Now click on Upgrade button as shown below in the image. Once you click on the Upgrade button, You can Follow the on-screen instructions and make the payment. Once payment is made, You are good to go. In case of any issues contact us at contact@botpenguin.com .Downgrade/Cancel planYou can downgrade your plan in a few quick steps; here is how:Step 1: Navigate to the Subscriptions panel from the left menu bar and then go to the Plan tab. Step 2: Click on the Free Plan button available under the baby plan option. Step 3: Once you click on the Free plan button, you will see the below pop-up, You can downgrade your plan by clicking on the Downgrade to FREE plan.Step 3: Once you complete step 2, you will see the confirmation message that your cancellation/downgrade request has been placed. You need to confirm the same from the Subscription tab as shown in the image below. You should see the downgrade request as shown in the image below. If yes, You are done! Your plan will be downgraded in next billing cycle and you won’t be charged from now on.In case of any questions or concerns, Contact us at contact@botpenguin.com
IntroductionCreated your chatbot? As you explore subscriptions, you might have some questions. Here’s the guide to help you navigate the process smoothly.Why Choose a Subscription Plan?How to Upgrade Your Plan?Key Factors to Consider When Comparing PlansSteps to Downgrade or Cancel Your PlanWhy Choose a Subscription Plan?When you create your first chatbot, BotPenguin provides the Baby Plan, which includes:Creation of one chatbot1,000 platform messages per month100 WhatsApp conversations

per month (if you have created a WhatsApp chatbot)And many more featuresTo increase the number of chatbots, platform messages, WhatsApp conversations, integrate more third-party apps, and access additional features, you can upgrade your plan according to your needs.The importance of having a subscription plan for your chatbot should be clear to you. Let’s begin with how you can effectively manage your subscription plans and upgrade your existing plan.To manage your chatbot, first visit the BotPenguin Dashboard: https://app.botpenguin.com/home

Create New Bot: Start creating your new chatbot by clicking on “Create New Bot”Subscription: You can manage and upgrade your current plan by clicking on either “Subscription” .Click on “Subscription” in the left sidebar.

PlanIn the “Plan” panel, you can view, Upgrade and Downgrade your existing plan.

We offer plans on a monthly or yearly basis, including;Baby PlanLittle PlanKing PlanEmperor Plan (customizable)   You will get two months FREE in the yearly planBut what factors do you need to consider when selecting your plan?Key Factors to Consider When Comparing PlansNo. of Bots: Maximum number of bots you can create. For example, if you have taken the Little Plan, the maximum bot limit is five, so you cannot create more than five bots.No. of Websites/ WhatsApp numbers/ Telegram numbers/ Facebook messengers/ MS teams: These are the maximum number of bots you can create on any platform.Create Support Team for Live chat: It is the maximum number of team members you can onboard on BotPenguin platform.Subscribers/ Leads: Maximum number of new customers you will acquire from your chatbot.Conversation History: Maximum duration you can view your chatbot’s history.AI Chatbot Features: You can have ChatGPT integration, train your chatbot, get a data storage limit, and access many more features depending on your plan.For more details, click on "View Detailed Pricing.” Now, after comparing, let’s start with Upgrading your plan.Upgrading your PlanClick on "Upgrade Plan" for your selected plan.

Enter your billing address and proceed to complete your payment.

Now that you have upgraded your plan, explore the details of the Add-on featureAdd-onEnhance your experience with add-on features, increasing messages and conversations based on your needs.To access the Add-on feature, click on the “Add-on” panel

Select the options that best meet your requirements.Current SubscriptionCheck your current subscriptions from the subscriptions panel. You can access the same by clicking on the Subscriptions in the left side menu bar and then selecting the Subscriptions tab in the top menu bar as shown in the image below. Here you can see all of your current subscription details.

Upgrade your planStep 1: Once you can see the screen similar to above, a. Select whether you want to purchase the Monthly or yearly plan from the top left. You will get two months FREE in the yearly plan.c. Now click on "Change Plan" button as shown below in the image.

Once you click on the "Change Plan" button, You can Follow the on-screen instructions and make the payment. Once payment is made, You are good to go. In case of any issues contact us at contact@botpenguin.com .Downgrade/Cancel planYou can downgrade your plan in a few quick steps; here is how:Step 1: Navigate to the Subscriptions panel from the left menu bar and then go to the Plan tab.

Step 2: Click on the Change Plan button available under the baby plan option.

Step 3: Once you click on the Free plan button, you will see the below pop-up, You can downgrade your plan by clicking on the Downgrade to FREE plan.

Step 4: Once you complete step 2, you will see the confirmation message that your cancellation/downgrade request has been placed. Step 5: You need to confirm the same from the Subscription tab as shown in the image below. You should see the downgrade request as shown in the image below. If yes, You are done! Your plan will be downgraded in next billing cycle and you won’t be charged from now on.In case of any questions or concerns, Contact us at contact@botpenguin.com

I haven’t received my verification linkIf you haven’t received your verification link, then you can check following things: Check your spam folder in your Inbox.You can also regenerate a new link after 30 seconds by clicking on the Resend button on the verification page. If the issue persists, you can contact at contact@botpenguin.com for further assistance.I am unable to resend my verification linkIf you are unable to resend the verification link request, then you can regenerate a new link after 30 seconds since the last request by clicking on the Resend button on the verification page. If the issue persists, you can contact at contact@botpenguin.com for further assistance.What are conversational landing pagesConversational landing pages are interactive web pages for organizations who do not have a proper website for visitors. The landing page can ask questions, collect information and provide information to visitors. Conversational landing pages can help drive four times more conversions than a basic landing page.What is a livechat bot or Live chat widgetA traditional chatbot answers questions based on a predefined set of answers. In contrast, a live chatbot works with a support agent and a predefined set of answers. It adds empathy, a whole new level of customer assistance. The main benefit is that your support team can take over anytime the conversation becomes complex. How to upload a custom chatbot Icon & colorLogin to the BotPenguin app using your registered credentials.On your dashboard or side navigation panel under bots, you can see the different bots you have created, or you can create a new one. Select any bot or click on Edit Icon, which will open a new screen of Bot Setup Select the 3rd option, Bot Settings, and a new page with the Design tab will open up. On the page, you will see the option to change the Bot Icon along with Other design changes. You can upload a new icon by clicking on the upload icon or selecting from available Avatars. Once you have selected/uploaded, click the Save Changes button. To change the Bot's color, choose the desired colors from the Theme Color and Chat Background Color options. Please note that any changes in the Bot will reflect in 15 mins time intervals. If you want them to change immediately, Navigate to the 'General' tab, click on the Invalidate Cache option, and save changes.What is a Facebook bot, and how does it worksFacebook Bot is the Integration of your Facebook business page and BotPenguin Application. Once the Integration is completed and active, BotPenguin enables you to run a pre-programmed flow on the Facebook page messenger.Automated messages are sent to people commenting on your page post and collect leads and many more features. To make the Integration, You will require to provide permissions to BotPenguin to access your pages and manage certain permission. How to get the WhatsApp Business API keyThe WhatsApp Business API key is the access key to access your WhatsApp business API account. It enables you to access the messages/chat sent on your WhatsApp number, manage your WhatsApp profile, or many more features using the BotPenguin platform. This key will be available once your mobile no has been whitelisted/approved for the Whatsapp Business API account by Meta.What is a Telegram bot tokenA Telegram bot token is an authentication token/key issued by Telegram. It enables you to access the messages/chat sent on your telegram bot, manage your Telegram contacts, or many more features using the BotPenguin platform.How to create a new bot tokenOpen your telegram app, Search For @BotFather The Botfather is an official bot of Telegram that issues an API Key for each Bot present on Telegram. Type the command /newbot. It will ask for your Bot's name. Type in a name, and then a message will pop up with the API key and other details. Copy the details and save them for future use. How can I update or change the Error message being sent by the bot?You can customise the error messages by below steps:Open the chat flow builder and click on the chat component whose error message you want to change. It will open up the option for that chat component on the right panel. Click on the "Advance" and Locate the error message field. Here you can change your error message as you wish.

How to install website bot using java script.Copy the Javascript code from the BotPenguin app & Go to your website's HTML codePaste the script in the head or body tag of your HTML code Please NoteEnsure that you paste the script before the tag is closed, i.e., paste the script before </head> or </body>.Make sure BotPenguin should be the last script to execute, as some scripts may override the BotPenguin script.How to install a bot on a WordPress website?After you have logged into your BotPenguin account, Go to the Bots Tab, select the desired Bot, and navigate to the Install section.Move to the WordPress section and copy the API key available there.Open your website's wp-admin, adding "/wp-admin" at the end of your Domain URL. E.g., If your website URL is "www.expample.com," then you can open WP-Admin using the Link "www.example.com/wp-admin"Go to Plugins > Add new > Search Botpenguin > Install now > Activate plugin"Install the "BotPenguin" Plugin and then activate the same.Upon activating the Plugin, you will be redirected to the plugins page with the confirmation message "Plugin Activated."Once your Plugin is activated, paste the Bot Penguin API key in the Box named "BotPenguin Snippet" that you Copied from your BotPenguin account.Save the Settings, and you are all set. BotPenguin has been integrated into your website.Bot is not showing up upon activation of wp-rocket plugin. If you have both wp-rocket and BotPenguin Plugin/Script added to your WordPress site, You may face the issue of the BotPenguin not showing up on the website. In case you are facing such issues, try the below steps, and it will solve the problem. Login to your wp-admin panel and open the wp-rocket settings. Go to the File Optimization → JavaScript Files -> Load JavaScript deferredAdd the BotPenguin bot script here under Exclude Java Script Files option, and done! For more details, Check out the following documentation by wp-rockethttps://docs.wp-rocket.me/article/976-exclude-files-from-defer-jsWhat is the minimum browser version requirement for the BotPenguin website bot?BotPenguin is a JS-based software. Hence your browser must support the Java Script. The minimum requirement for some renowned browsers are as follows: Google Chrome: Version 51 or aboveEdge: Version 14 or aboveSafari: Version 10 or aboveFirefox: Version 52 or aboveHow to resolve the latency issues on my website when I have a chatbot installed? We understand the criticality of website speed and responsiveness. Adding a trigger delay only delays the chatbot from opening, but the script of the chatbot is loaded at the same time as the page, which can delay the overall page loading and create latency issues. This happens because of the vast processes that allow chatbots to run smoothly. However, this problem can be solved. In the document ready function, create a timeout function of 3sec. In that timeout function, create a script element with the details of the script shared while installing the chatbot.Copy

```
<script>
    const scriptEle = document.createElement("script");
    scriptEle.src = ('src', 'https://cdn.botpenguin.com/botpenguin.js');
    scriptEle.setAttribute('id', 'BotPenguin-messenger-widget');
    scriptEle.innerHTML = '[Your Bot ID]';

    document.onreadystatechange = function () {
      if (document.readyState == "complete") {
        setTimeout(() => {
          document.body.appendChild(scriptEle);
        }, 3000);
      }
    }
  </script>
```

Please note: Do not forget to replace [Your Bot ID] with you bot ID that you can find in your script.And done, All sorted.What are the channels where I can install my bot?As of now (13/12/23), We have the following channels where you can run your bot toWebsite WhatsappFacebookTelegramStandalone landing pageAlso, Instagram is coming soon!Why my bot is not showing up upon activation of wp-rocket plugin?If you have both wp-rocket and BotPenguin Plugin/Script added to your WordPress site, You may face the issue of the BotPenguin not showing up on the website. In case you are facing such issues, try the below steps, and it will solve the problem. Login to your wp-admin panel and open the wp-rocket settings. Go to the File Optimization → JavaScript Files -> Load JavaScript deferredAdd the BotPenguin bot script here under Exclude Java Script Files option, and done! Also you can add this provided code snippet :

```
<script>
  const scriptEle = document.createElement("script");
  scriptEle.src = ('src', 'https://cdn.botpenguin.com/botpenguin.js');
  scriptEle.setAttribute('id', 'BotPenguin-messenger-widget');
  scriptEle.innerHTML = '6ffd62fkb3013e15bc12ba60,6ffd62fkb3013e15bc12ba60'; // Replace with your
chatbot IDs

  document.onreadystatechange = function () {
    if (document.readyState == "complete") {
      setTimeout(function() {
        document.body.appendChild(scriptEle);
      }, 10);
    }
  }
</script>
```

How do we collect country, city, mobile number, and other metadata?BotPenguin fetches the country and city of a visitor from their IP Address. Mobile numbers and metadata are fetched from different components of your chat flow. For example:- Name, email, and phone number components in your chat flow.What does visit mean?A visit is a term used to describe a visitor that engages in a conversation with your chatbot.Can I export data in the form of CSV?Yes, you can easily export data in CSV from the export button in the leads tab under Inbox. Navigate to the Inbox Tab & Click on Leads Click on the Export Button available on the top right section of the page.How can you call customers with the Call feature in the leads section?BotPenguin offers an integration with Twilio to call your leads from the Inbox. You can use the call feature to call leads and customers from the leads section directly from your desktop. You must integrate Twilio with BotPenguin to set up the calling feature in BotPenguin.How to integrate Twilio?You can integrate Twilio from the integrate Twilio option in the Inbox Tab. In The Inbox tab, Click On The Integrate Twilio Button. To complete the Integration, you need:- Account SiID Phone Number TwiML App SID API Key API Secret App URL (POST)You can find all of these credentials on the Twilio Dashboard. Also, you can contact us at contact@BotPenguin.com for further assistance. After you fill out these parameters, you can quickly call leads from BotPenguin. Refer To The Following Steps To Obtain Your API Key and SID On Twilio Click on the Account link in the top-right navigation. In the submenu, click on API keys & tokens. Scroll to the bottom of the page and click Request a Secondary Token Also, on this page, you can find your SID at the bottom.How to see the customer profile?Navigate To The Inbox Tab, and it will list the customer profile under the Leads or Contacts tab. Also, you can click on any customer in the leads or messages, and a window will open all the necessary info. The customer profile will open on the rightmost side of your screen, where you can see all the details. You can also add tags and notes in this section.Can I Assign tags to the customer? Yes, there is a feature to assign tags to different customers based on your preferenceAfter applying tags, you can easily filter customers through tags and send out custom messages. Navigate To The Inbox Tab You can click on any customer in the leads or messages tab. A window will open all the necessary info. The customer profile will open on the rightmost side of your screen, where you can see all the details. You can also add tags and notes in this section.How to add tags?Navigate To The Settings under more optionsYou can click on Tags. You will be redirected to Manage Tags page.There you can see a table in which all the previously made tags are available. On top right of the box click on "Create Tag".Enter a tag name and and click on "create tag".You have successfully added the tag. Now you can use it for your customers.What are the notes, and how does it work?The notes feature helps you record important details and things your team wants to know about a specific customer. For example, if they provide an alternate number or the time they will be available to take a call.You can add notes by following the below steps. Navigate To The Inbox Tab You can click on any customer in the leads or messages tab, and a window will open all the necessary info. The customer profile will open on the rightmost side of your screen, where you can see all the details. You can also add notes in this section. Type your notes under the input box with the name 'Notes' and Hit enter after you are done. Watch out for the message updates to confirm that your changes are saved.What are the quick replies, and how does it work?Quick replies are the template responses that you can save and use during the live chat. You can access these quick replies whenever you enter '/' into your chat window, the Bot will automatically fetch your list of quick replies, and you can select the one you want to use.You can add quick replies in the BotPenguion app by following steps:Navigate To The Inbox TabYou can click on any customer in the leads or messages tab. A window will open all the necessary info.The customer profile will open on the rightmost side of your screen, where you can see all the details.How to transfer Chat to WhatsApp?BotPenguin offers you the option to transfer the chat to WhatsApp or an agent on your support team. To transfer the chat to WhatsApp, the visitor must start a Live chat by clicking on the three-dot menu beside the cross 'X" icon. After an agent accepts your request, you can transfer the chat to Whatsapp by again opening the menu and selecting Transfer to WhatsApp. If you have a WhatsApp bot, make sure you have a support agent on call to respond to live chat requests. Also, ensure that your agent has the same contact number as your WhatsApp business account. Moreover, the chat history for WhatsApp will not be stored on WhatsApp. How to assign chat to an agent?The customer support team can transfer live chat requests to their fellow team members. To do the same, Navigate to Inbox from the side navigation panel and then move to the Live chat tab.Go Under the messaging area in the middle bottom of the window. Click on the three dots available besides the emoji icon. It will open up the option to transfer the chat to other customer support team members.What are contacts?Any visitor interacting with WhatsApp, Facebook, and Telegram Bot and submitting details like name, email address, and/or phone no. is considered a contact. You can also manually import or add new contacts.You can see your contacts in the 'contacts' tab under the 'Inbox; section. Navigate to the Inbox TabHow to download a sample sheet for contacts?You can download a sample sheet for contacts from the sample sheet option next to the import contacts option.How to import contacts?Navigate To the 'Contacts' tab under the 'Inbox' section from the side navigation Panel. Click on the 'filter' option to select the specific Bot or All, and then click the Import Contacts Option to download data into a CSV file.How to add a new contact?Navigate To the 'contact' tab under 'Inbox' from the side navigation panel and click on

the 'Add Contact' button on the top right. It will open the input boxes to add a new contact manually. Once done, Please click 'Add Contact' to save the new contact.What are segments?Segments are groups of similar target audiences based on their characteristics like demographics, behaviors, and interests. You can group your subscribers into segments based on their similar characteristics. These will then be used in broadcast campaigns.How are segments created?To Create SegmentsNavigate to the Inbox tab Click On Segments Click on the Create Segment Button After clicking, Type your Segment Name. Select a Platform From Facebook, Google, and WhatsApp Select Your Bot Now You Select The Condition Type. It can be based on Two ThingsAttribute - Distinct Features Of Your VisitorsTags- The Tags That you have created in the customer profileYou can create segments based on their characteristics like demographics, behaviors, interestsWhat are the conditions, and how can you use them to create segments?While creating a segment, you can Select The Condition Type based on Two Things.Attribute - Distinct Features Of Your Visitors Tags- Tags That you have created in the customer profile Conditions are the differentiation factors that segmentize a group of customers from the entire base. You can use tags to filter based on the tags you have created,, or you can use Attributes like Names To Create Segments.. How to change my email ID?You cannot change your email address once you have created your account from the BotPenguin app. However, You can contact BotPenguin at contact@Botpenguin.com to change your email address.How to delete my Botpenguin account?Once you login to your BotPenguin account Navigate to "My Account" section and then click on 'Password" settings. Here ye can see a button named "Delete Account". Click on that to delete your Botpenguin Account. Do I receive any notification when any Livechat request has come up?Your notifications dashboard will receive notifications when live chat requests come through. These notifications are visible to you and the agents you add to your account.What is a team? How do you add a new team member?A team in BotPenguin is people in your organization that will take over for a live chat request. You can add up to three support agents to your team. Moreover, you can give your team access to your account by giving them a separate account with credentials you create in the Team module. To add the same, Navigate the To Team Tab. Click On Add Team Member To Add A New Member, Fill Out The Name, Email, and Password of your new team Member. You can also add their photograph and WhatsApp Number.How can a new team member log in to the BotPenguin?A new team member can log in with their assigned credentials on BotPenguin. You can add three members to the team module on BotPenguin. The main account owner will have full access to these credentials and can change them as they see fit.Navigate To Team TabClick On Add Team Member To Add A New MemberFill Out The Name, Email, and Password Of You New Team Member. You can also add their photograph and WhatsApp Number.For example, A New Team member here will log in on app.botpenguin.com from their email address xyz@gmail.com and the password above.
What do messages mean?Messages are the count of messages sent by a chatbot during a conversation. You are assigned a specific number of messages per billing period according to your plan that you can see on your dashboard.What do Conversations mean?Conversations are the unique chat sessions visitors engage with your chatbot during their visit. You can track your conversations with your dashboard and the inbox dashboard. A conversation terminates when a user closes the chat widget.How do we count messages?We count only the messages the chatbot sends to the bot user during any billing period. It will not count any messages sent by the user.What are the leads?The people who leave their contact information, like phone numbers and email addresses, are considered leads. A lead is part of qualified traffic on your website. These visitors have a high chance of purchasing your services or products.What is considered the lead?The visitors who leave their contact information, like phone numbers and email addresses, are leads with our chatbots. In your chatbot, you can mark any question for lead consideration. If the user replies to that question, it will be considered a lead.What is a subscriber?Anyone who interacts with Telegram, WhatsApp, and the Facebook bot is considered a subscriber. Subscribers are visible on your Analytics dashboard. You may find them as a contact as well.How to check individual Bot uses or all account uses?You can check out all users on your account in the Analytics. It has a detailed summary of both categories. To Check All Bot Uses, Navigate To Analytics. Find the "Analytics Summary" Tab Change The Leftmost dropdown to all bots and the rightmost dropdown to the period you want (weekly, monthly, yearly) To Check A Specific Bot Usage, Navigate To Analytics. Find the "Analytics Summary" Tab Change The Leftmost dropdown to the Bot you want to check for and the rightmost dropdown to the time period you want (weekly, monthly, yearly)
How to add branching to the flow?Log in to your account. Click on the bot you want to configure. Click on the Edit your chat flow tab. You can add branching by clicking on the Add New Component Button. After

clicking the button, you will see a list of components. Now, choose Single Choice. Click on the component, and a configuration window will appear. Now configure your questions accordingly. Also, you can add more options if you want by clicking on the + symbol.How to give multiple choice options in chat flow?Log in to your account. Click On the bot you want to configure. Click on Edit your chat flow Tab You can add Multiple choice questions by clicking on the Add New Component button. After clicking the button, you will see a list of components. Now, choose Multiple Choice and configure it according to your needs.What chat components can you use to create leads?You can use the name, phone number, and email chat flow component to collect the information you want to capture from leads. You can find these options in the Edit Your Chat Flow Tab. To Add these components, Log in to your account. Click on the bot you want to configure. Click on Edit Your Chat Flow tab Here you can add these by clicking on the Add New Component Button. After clicking the button, you will see a list of components. Choose the one you want to apply to.How to create a flow for appointment booking?Log in to your account. Click On the bot you want to configure. Click on Edit Your Chat Flow Tab You can add an Appointment booking by clicking on the Add New Component Button. After clicking the button, you will see a list of components. Now, choose Appointment and configure it according to your needs. The Appointment component comes with various options to configure. You can choose the date, day, time, and slot interval. You can integrate your google calendar to track all appointments within BotPenguin and avoid double bookings.
How to change the bot's position on the website?After you log in, Navigate to Bots Select the Bot you want to configureSelect the Bot Settings TabClick On The Design Tab. Here you can customize the position of your chatbot on your website as well as on mobile devices.How to disable Desktop Notifications?After you log in to the BotPenguin App, Navigate to the Bot Setting under the bot's menu.
1. Go to the Bot Settings and open Alerts the tab.
2. Check if you have subscribed to the desktop notifications or not?
3. If yes, You will see the below confirmation. Disable NotificationsA. Open your website settings by clicking on the lock icon on the top left, as shown belowB. Click on the button to open the settings; once you click on it, You will see the option to disable notifications. C. Disable the notifications, and you are done! You will not receive any notifications now.Please Note:This action will not disable the Live chat request Notifications.How can we change the messaging shown when the customers click to "talk to live agent"Changing Live chat button TextTo change the text for transferring chat to live agent, Follow the below steps. Navigate to Bot's Setting for "Chat Window" under "Website Chatbot Settings". Select the "Display name for Transferring to Live/Agent chat" and Edit the field as per the text you want

Once you are done, Your new text will appear like this. Changing the Waiting Message If you want to change the waiting message (Usual reply time: 2 to 3 Minutes), You can change the same from the How can I edit name of my chatbot?To change your chatbot's name, follow these steps:Navigate to the bot, on the home page in the side menu, you want to rename and click on it.On the bot management page, locate the top section where it says "Getting Started - [Current Bot Name]."Click on the edit icon next to the bot's name.A pop-up will appear. Enter the new name for your chatbot.Save your changes, and your chatbot will be updated with the new name.
How and when your conversation limits in WhatsApp will increase?Each time you initiate a new conversation with a unique customer Meta will determine if your limit should be increased. This determination is based on the following criteria:your phone number status is Connectedyour phone number quality rating is Medium or Highin the last 7 days, you have initiated X or more conversations with unique customers, where X is your current messaging limit divided by 2If you meet all conditions, we will increase your messaging limit by one level in 24 hours.How to check Meta Conversation limitYou can check your current messaging limits in the WhatsApp Manager > Overview Dashboard > Insights tab. The panel depicted below will only show your current limit if your messaging limit has increased from the default limit of 250.What is the phone number quality rating, and how does it affect my messaging limit?The phone number quality rating is a measure of your phone number's reliability and trustworthiness when initiating conversations with customers. If your phone number has been flagged in the last 7 days, Meta will immediately decrease your messaging limit by one level. This means you will have a reduced capacity to initiate new conversations with unique customers.How to add a new WhatsApp template?You can create templates either from the WhatsApp Meta Manager or using the BotPenguin template tab.Is there a free plan?No, WhatsApp's new policies do not allow free trials; if anyone provides it, it is nothing but false advertising.What is your markup on Meta prices?We do not charge anything on top of Meta

conversation charges; you pay the WhatsApp conversations fee directly to Meta.Is there any message limit?No, all charges are conversations based. BotPenguin's platform pricing is based on the plan of conversations you choose.I want a WhatsApp bot along with my website bot, what should I do?You must take two separate subscriptions, as WhatsApp has a different pricing structure.Can you provide me with green-tick verification?We do; we'll get you through everything once you start with us.Can I send bulk messages?Yes, they can be scheduled and targeted as per your strategy.
Can I use BotPenguin for free?Yes, BotPenguin's baby plan is free forever. We don't hold you back in any way.Do you have a trial account?The baby plan is like a trial, but it does not restrict you like everyone else. There is no time limit. Take all the time you want to, size up when you are ready.How many chat agents can I include in the King plan?You can include three agents with the king plan. You can add more agents at additional charges.What channels does the King plan include?BotPenguin's King Plan allows you to create chatbots for websites, Facebook and Telegram. You can also create conversational landing pages and live chat widgets.What happens when I cross the response limit?BotPenguin will continue working for you for 10% of your limit once you have reached maximum utilization. Post that, you will be requested to upgrade your current plan, your bots will not be able to bring leads and talk to your customers until you upgrade.How many Chatbots can be created in King Plan?Initially upto 50 Chatbots can be created. However, if someone reaches there, we can extend the limit.What is your refund policy?Get in touch with our friendly customer success manager who is handling your account, and they will make the process easy.Is there any free plan of BotPenguin?Yes, the free plan includes one Bot and sends up to 2000 messages per billing cycle. However, the free plan does not include a WhatsApp bot or other premium features.Does BotPenguin offer any discount?BotPenguin gives you 5 times productivity and tenth of the price of its competitors. All the prices are set to make the decision of going with BotPenguin a no-brainer. We can make it an even sweeter deal, if you choose the yearly plan. You need to pay for 10 months, if you choose the yearly plan, two months on us. Also, we do provide a 30% discount to Nonprofit organizations.Is there any discount on the yearly plan?You get two months free if you opt for a yearly plan.Can I cancel my subscription?It is a decision smart people won't take, but we respect your choices, you can cancel your subscription in settings.What if I cancel my plan?You can cancel your plan whenever you want. However, we will cancel your subscription only at the end of the billing cycle. Once you cancel your plan, you will not receive a new invoice from the next billing cycle. Hence, If you cancel your plan in January, you will not get a new bill in February.What if I upgrade my plan in between?If you upgrade your plan in between a billing cycle, we will deduct the price on your current plan from the new pricing, and you will only have to pay the rest. For example:- Suppose you upgrade to 7K monthly messages at 800 INR, and your current plan costs 400 INR. Then, you will have to pay 400 INR and 18% service tax (only if you reside in India) for upgradation.What is the pricing for the Messages add-ons?There are two options for adding messaging add-ons. You can add 5K or 10 K to your current billing cycle. You can check the pricing on the BotPengion subscription panel.What is the pricing for white labeling a chat window?You can check the pricing on the BotPengion subscription panel.How can I get my invoice?Log in to Your BotPenguin Account Navigate to the Subscriptions in the side navigation panel and then move to the Invoice Tab Click on Invoices, Here you can get a list of all your invoice. You can also send them to your email.Does BotPenguin store payment details?No, BotPenguin uses a secure payment gateway and does not store payment details. Your privacy and security are paramount to us.What if my payment fails and my money gets deducted?If your payment is not completed successfully and money has already been deducted from your account. You can contact support (at contact@botpenguin.com) and your bank for further information. Usually, your bank refunds the deducted amount within three working days.How do I make the payment?You can choose to pay via Stripe or Razor Pay, both are secure, encrypted gateways. Security is our topmost priority
How to go back / access old botpenguin UI / app?If you are struggling using the new UI, Don't worry, You will get fond of it very soon. You can access the old UI from the home page of the BotPenguin dashboard. Click on the Classic version button on the top navigation bar, and you will be redirected to the old UI. Alternatively, you can directly open the same using link below.Access old BOT Penguin UI
Can I train BotPenguin chatbots on my own data with ChatGPT?Yes, BotPenguin's state-of-the-art integration with ChatGPT brings you the power of Natural Language Processing, AI, with business intent. You can train your bots to give answers based on the selective data you provide.Do I need to use API key for ChatGPT powered bot ?Yes, You will need your own ChatGPT for running the AI-powered bot. By Default, We give 100 messages for free for demo purposes.I am not able to use ChatGPT4, as it is

greyed out. how can I use ChatGPT4?ChatGPT 4 access is enabled only for the user whose API key has access to ChatGPT4. If your API key does not have GPT Model 4 Access, Then It will show greyed out in your account. Here is the official documentation which can help with ChatGPT 4 access. Link: https://help.openai.com/en/articles/7102672-how-can-i-access-gpt-4

The Password field is not accepting my passwordWhenever you are setting up a password, make sure you use: At least 8 characters —the more characters, the better At least one uppercase letter At least one numeric character At least one special character, e.g.,! @ # ?] Failing to follow these guidelines may result in the issue you are facing.The Email field is not accepting my emailIt may occur due to the following reasons: You already have an account on BotPenguin The email address you entered is invalid or has been blocked by BotPenguinMy WhatsApp API key is not workingIt is happening probably because of the below reasons:The key you are using may not be correct or have some error. Verify your key with your providerYour key is already in use. My Telegram bot token is not workingIt is happening probably because of the below reasons:The token you are using may not be correct or have some error.Your token is already in use.I am unable to connect To my Facebook pageIt is happening probably because of the below reasons:You have not allowed all the permissions required for your Facebook page. Please note that you must be an admin of the Facebook page to initiate integration.You have already connected another application or bot to your Facebook page.Your Facebook business page or account is disabled temporarily or permanently.I have installed the script on my website; however, a bot is not appearingYour bot may not appear due to the following reasonsYou have exceeded your message limit on your planYou have disabled your bot in the country, IP, region, the website you want to access BotPenguin.There might be some typo in the script that you used to install the chat widget.You have not installed the script in the right location, i.e., is the head tag.I have connected the bot to my CRM. However, it is not sending leadsIt may occur due to the following reasons:Authentication credentials such as Auth Token or API key entered incorrectly or have expired, So try reconnecting the CRM. Make sure that your CRM account is working fine. Make sure all the parameters fields are mapped correctly Make sure you have a paid subscription to BotPenguin, and that You have not exhausted your message limit.I am unable to connect to my CRMIt may occur due to the following reasons:Authentication credentials such as Auth Token or API key are entered incorrectly or have expired, So try reconnecting the CRM. Make sure that your CRM account is working fine. Make sure all parameter fields are mapped correctly.I created the test lead. However, I cannot see it in my leads panelIt may occur due to the following reasons:Your lead can be delayed for 15 min in some cases.Your visitor does not qualify for the leads.I am not receiving new lead notificationsIt may occur due to the following reasons:Your lead can be delayed for 15 min in some cases. Your visitor does not qualify for the leads. You will not receive a notification until you have closed the chat session by clicking on the X button if you haven't enabled the 'Send incomplete response' option. This feature is only available under the paid plan, So make sure you are not on a free plan.My analytics seems to be wrong. It shows old dataYour Analytics will update at 24-hour intervals, So every time you see the analytics, it shows data since the previous day's end. Please Note:Currently, Analytics does not count any messages from Facebook, WhatsApp, or Telegram bot.I am unable to add anything after three team membersIn the paid plan for BotPenguin, There is a Limit of 3 team members. Suppose you want to add more than three members. You can contact us to set up more than three team members at an additional cost.I am unable to apply the white label add-onThis feature is only available to users with a King plan subscription and above. Hence, you must upgrade your subscription first to avail white label add-on.I am unable to use the messages add-onThis feature is only available to users with a King plan subscription and above. Hence, you must upgrade your subscription first to avail yourself of message add-ons.My payment link has expiredDue to security reasons, a payment link is only available for a specific period. If your payment link has expired, you must retry payment again by creating a new one from the payment gateway. If your money is deducted and the transaction has failed, it usually returns in three business days. If not, please contact us at contact@botpenguin.com.I have made changes to my configuration. However, it is not reflected in the botAll the changes of Bot Configuration get reflected after 15 mins. If you can't see the changes, Go to Bot Settings -> General and Click the Invalidate cache button.

Setting Up Your Facebook Business Manager: A Step-by-Step GuideCongratulations on starting your journey with Facebook Business Manager! This guide will walk you through the process of creating a business manager, updating crucial settings, and ensuring a secure and optimized setup.Step 1: Creating Your Business ManagerTo begin, you'll need to create your Facebook Business Manager. Follow these steps:Open your web browser and navigate to the following link:

https://www.facebook.com/business/help/1710077379203657?id=180505742745347Step 2: Essential Business Manager SettingsOnce you have your Business Manager up and running, it's time to configure some essential settings for a smooth experience:1. Fill Business Details Correctly:Under the "Business Info" section within your Business Manager's settings:Ensure all business details match the information on your official registration documents.Double-check your business name, address, contact information, and any other relevant details.2. Enable Two-Factor Authentication (2FA):Navigate to the "Business Options" in the "Business Info" section:Enable two-factor authentication (2FA) for everyone accessing the Business Manager.This extra layer of security helps protect your account from unauthorized access.3. Submit Your Business for Verification:Visit the "Security Center" section within your Business Manager settings:Submit your business for verification to enhance your account's credibility.Follow the provided steps to complete the verification process.4. Connect and Verify Facebook Page:Go to the "Pages" section of your Business Manager:Connect the Facebook Page that your business has been using for some time.Verifying your page establishes authenticity and unlocks additional features.5. Domain Verification for Brand Safety:In the "Brand Safety" and "Suitability" section:Add and verify your domains to ensure a safe and consistent brand experience.This step helps maintain brand integrity and control over your online presence.RememberAlways keep your business details accurate and up-to-date.Regularly review and maintain your security settings.Engage with your Facebook Page and use the tools available to enhance your business presence.With these steps completed, your Facebook Business Manager will be optimized for success, security, and brand visibility. Enjoy managing your business with the power of Facebook's business tools!

Disclaimer:The information provided in this help document is based on Meta's (formerly Facebook) official documentation available at the following link: https://developers.facebook.com/docs/whatsapp/pricingPlease note that the content presented here may be subject to change over time, as per updates or revisions made by Meta. We strive to keep this document accurate and up-to-date, but we recommend referring to the official documentation for the most current and reliable information.Conversations Conversations are 24-hour message threads between you and your customers. They are initiated when messages you send to customers are delivered. You can send any number on message back and forth within that 24 hrs window to that customer. The types of conversations are explained below in know section. Meta PricingRates vary based on conversation category and country/region. You can download the rate card corresponding to your WhatsApp Business Account's currency for specific rates.Please refer to the attached rate cards for detailed pricing information applicable from June 1, 2023.USD Rate CardAUD Rate CardEUR Rate CardGBP Rate Card IDR Rate Card INR Rate CardKnow More about some key conceptsConversation Categories Conversations are categorized into the following types:Marketing: Includes promotional messages, offers, informational updates, or invitations for customer responses.Utility: Facilitates specific, agreed-upon requests or transactions, or provides updates on ongoing transactions.Authentication: Enables user authentication with one-time passcodes for account verification, recovery, etc.Service: Helps resolve customer inquiries and support-related matters.Please Note: Marketing, utility, and authentication conversations require template messages, while service messages use free-form messages.Opening Conversations Conversations are opened when you send a template message or free-form message based on the following conditions:Marketing, Utility, and Authentication Conversations: When you send an approved template message and no existing open conversation of that category exists with the customer.Service Conversations: When you send a free-form message within the customer service window, and no open conversation with any category exists with the customer.Customer Service Windows When a customer messages you, a 24-hour customer service window starts. Within this window, you can send free-form and template messages. Outside this window, you can only send template messages.Conversation Duration Marketing, utility, authentication, and service conversations last 24 hours unless replaced by a newly opened free-entry point conversation. Free-entry point conversations last 72 hours.Multiple Conversations Multiple open conversations are possible with a customer in the following situations:Sending different template messages of various categories within 24 hours.Sending a template message within 24 hours when an open service conversation exists.Free Tier Conversations Each WhatsApp Business Account gets 1,000 free service conversations each month across all business phone numbers. Marketing, utility, and authentication conversations are not part of the free tier.Free Entry Point Conversations A free entry point conversation opens when a customer messages via a Click to WhatsApp Ad or Facebook Page Call-to-Action button, and you respond within

24 hours. It lasts 72 hours and automatically closes all other open conversations with the customer.For further assistance or clarifications, feel free to reach out to our support team.

To update your WhatsApp profile, please follow the below steps. Step 1: Access the Meta Business SuiteOpen your web browser and navigate to the Meta Business Suite.Log in to your Meta Business Suite account using your credentials.Step 2: Locate and Access Business SettingsIn the Meta Business Suite, find the top-left dropdown menu that displays your business account name.Click on the Settings (gear) icon next to your business account name.Step 3: Navigate to Business SettingsAfter clicking the Settings (gear) icon, a dropdown menu will appear.Click on "Business settings" from the dropdown menu.Step 4: Access WhatsApp ManagerIn the Business Settings section, locate and click on "WhatsApp Account" under the "Accounts" tab on the sidebar.Select your WhatsApp account and click on the "Settings" tab to find the WhatsApp Manager.Open WhatsApp Manager.Step 5: Select the WhatsApp Account for Green TickFrom the list of WhatsApp accounts, choose the account you want to apply for the green tick.Step 6: Update your WhatsApp profile and SaveBy default, It will take you to the profile page, You can update your profile here and click the "Save" button on the top right corner. You can also open this page from Phone number settings. Congratulations! You have successfully updated your WhatsApp Bot profile. You can alternatively do the same from the BotPenguin dashboard as well. If you encounter any issues or need further assistance during the application process, feel free to contact our support team for help.
The WhatsApp green tick is a valuable symbol of trust and verification for businesses. To be eligible for the green tick, you must meet specific prerequisites. This document provides a step-by-step guide on how to apply for the WhatsApp green tick once you fulfill the necessary requirements.PrerequisitesBefore applying for the WhatsApp green tick, ensure you meet the following requirements:You must be using a WhatsApp Business API Account with Facebook Business Verification.Enable 2-Step Authentication for added security.Your business must be registered as an official business entity (individual businesses are currently not allowed).Your business should have at least 3 organic Public Relations (PR). Note that paid PR does not count toward this requirement.It's recommended to be in Tier 2 or above messaging level.Once you have met all the prerequisites, you can proceed with the application process.Step-by-Step Guide: Applying for WhatsApp Green TickStep 1: Access the Meta Business SuiteOpen your web browser and navigate to the Meta Business Suite.Log in to your Meta Business Suite account using your credentials.Step 2: Locate and Access Business SettingsIn the Meta Business Suite, find the top-left dropdown menu that displays your business account name.Click on the Settings (gear) icon next to your business account name.Step 3: Navigate to Business SettingsAfter clicking the Settings (gear) icon, a dropdown menu will appear.Click on "Business settings" from the dropdown menu.Step 4: Access WhatsApp ManagerIn the Business Settings section, locate and click on "WhatsApp Account" under the "Accounts" tab on the sidebar.Select your WhatsApp account and click on the "Settings" tab to find the WhatsApp Manager.Open WhatsApp Manager.Step 5: Select the WhatsApp Account for Green TickFrom the list of WhatsApp accounts, choose the account you want to apply for the green tick.Step 6: Submit Request for Official Business AccountLocate the "Official Business Account" section in profile sectionClick on the "Submit request" button.Step 7: Fill and Submit the RequestOnce the "Request official business account" pop-up opens up, fill in the necessary details.Submit the request for the WhatsApp green tick.Once your application is approved, you will receive an email notification confirming the green tick status.Congratulations! You have successfully applied for the WhatsApp green tick. The green tick will now appear next to your business account, providing credibility and trust to your customers.If you encounter any issues or need further assistance during the application process, feel free to contact our support team for help.
This document will guide you through the step-by-step process of creating the BotPenguin WhatsApp Bot using the WhatsApp Business Cloud API. By following these instructions, you can set up your WhatsApp Bot and integrate it with the BotPenguin platform.Step 1: Check for Pre-requisitesBefore you begin, ensure you have the necessary prerequisites in place, such as access to the BotPenguin platform and a WhatsApp Business Cloud API account. Prerequisites for WhatsApp BotsStep 2: Create a Meta AppBegin by creating a Meta App for your WhatsApp Bot on the BotPenguin platform.Provide the required details and follow the app creation process. Create a Meta AppStep 3: Register and Verify WhatsApp NumberRegister and verify the WhatsApp number that you want to use for your BotPenguin WhatsApp Bot.Ensure that the number is verified and authorised for use with the WhatsApp Business Cloud API. Register & Verify your WhatsApp NumberStep 4: Subscribe WA Webhook with

BotPenguinSubscribe the WhatsApp (WA) web hook with the BotPenguin platform.This will enable your WhatsApp Bot to receive messages and interact with users. Subscribe WA webhook with BotPenguinStep 5: Update Payment Method to WhatsAppIn the developer dashboard, update the payment method for your WhatsApp Business Cloud API account to enable seamless transaction processing. Update WA account Payment MethodStep 6: Assign System User to WhatsApp AccountAssign a system user to your WhatsApp Business Account in the developer dashboard.This will provide the necessary permissions for the system user to access and manage the WhatsApp account.   ♀ Assign System User to WhatsApp AccountStep 7: Get All Necessary Details from Developer DashboardAccess the developer dashboard associated with your WhatsApp Business Cloud API account.Retrieve all the necessary details required for integrating with the BotPenguin platform. Getting all the necessary details from Meta Developer DashboardCongratulations! You have successfully created the BotPenguin WhatsApp Bot using the WhatsApp Business Cloud API and integrated it with the BotPenguin platform. Your WhatsApp Bot is now ready to interact with users and provide automated responses.Please note that specific steps and requirements may vary based on updates and changes in the BotPenguin and WhatsApp Business Cloud API platforms. If you encounter any difficulties during the process or have further questions, please refer to the official documentation of BotPenguin and WhatsApp Business Cloud API, or contact their support teams for assistance.

In order to create the WhatsApp bot using the WhatsApp cloud API, the following things are required. PrerequisitesBefore you start creating the WhatsApp bot, Make sure that you have A phone number that is Active & capable of receiving SMS.Not registered on WhatsApp or WA Business App.Registered legal businessAn active website with a valid privacy policyBusiness use case compliant with WhatsApp and Meta commerce policy. A valid payment method (Debit or Credit card) capable of making international payments to Meta for conversation charges.GSTIN Number, Only if the business is registered in India.If you have all of the above checked, You are good to start with WhatsApp Cloud API Bot.Please note that a single mobile number can only be utilized on one of the WhatsApp services at a given time, namely WhatsApp, WA Business, or WhatsApp Business API. If you wish to use your existing number, you are required to remove your account from one service before using it on another.

Disclaimer

Please be aware that some or all portions of this document have been sourced from Meta’s official documentation. The original content can be accessed directly from the official Meta documentation available at https://developers.facebook.com/docs/development/create-an-app/.Before you start,You must be logged into your Facebook developer account.Ensure you have not exceeded your app limit. As a Developer, you are permitted to have a developer or administrator role on a maximum of 15 apps. If you have reached the app limit and are unable to create an application or accept a new pending role, take the following steps:Visit your My Apps page to remove any apps you no longer use. You can remove an app entirely or resign your role as an administrator or developer from the app.Step 1: Start the app creation processIf you just came from the registration flow, click the Create First App button. Otherwise, go to the Apps panel and click Create App.Step 2: Choose a use caseSelect the use case as "Other"Step 3: Choose an app typeChoose the app type as per your use case. In most cases it is Business .

Step 4. Set your app name and emailEnter the name of your app and an email address where we can send you any important developer notifications. The email address can be different from the email address associated with your Facebook account.Once you have completed the app creation flow your app will be loaded in the App Dashboard.

This document will guide you through the step-by-step process of adding and verifying your WhatsApp number on the Meta developer dashboard. Following these instructions will enable you to use WhatsApp services in your application or business.Step 1: Access the Developer DashboardOpen your web browser and navigate to the Meta Developer Dashboard.Log in to your developer account with the appropriate credentials.Step 2: Add WhatsApp ProductOnce you are logged in, locate the sidebar on the dashboard.Click on the "Add Product" option.Step 3: Set Up WhatsApp ProductIn the list of available products, find and select "WhatsApp."Click on the "Setup" button associated with the WhatsApp product.Step 4: Navigate to API SetupIn the sidebar, find and click on the "API Setup" option under the "WhatsApp" section.Step 5: Add Phone NumberIn the API setup section, proceed to "Step 5."Click on the "Add phone number" button.Step 6: Create Your WhatsApp ProfileOn the following screen, you will be prompted to create your WhatsApp profile.Fill in the required details:WhatsApp Business Profile Display NameTimezoneCategoryBusiness DescriptionAfter providing the details, click on the "Next" button.Step

7: Request Verification CodeOn the next screen, enter your mobile number, which you want to verify.Request a verification code by clicking the appropriate button.Step 8: Verify the NumberUpon receiving the verification code on your mobile number, enter it on the provided screen.Click on the "Verify" button to proceed.Step 9: Number Verification and Addition Congratulations! Once you have successfully verified the code, your WhatsApp number is now verified and added to your Meta Developer Dashboard. You can now use this number for WhatsApp services within your application or business.Please note that the process of adding and verifying the WhatsApp number may vary based on any updates or changes in the Meta Developer Dashboard. If you encounter any difficulties or issues during the process, please refer to the official Meta documentation or reach out to BotPenguin support team for further assistance.

This document will guide you through the step-by-step process of subscribing to a webhook for your WhatsApp account on the Meta dashboard. By following these instructions, you can receive messages and notifications via the webhook.Step 1: Access the Developer DashboardOpen your web browser and navigate to the Meta Developer Dashboard.Log in to your developer account using your credentials.Step 2: Configure WebhooksGo to the "API Setup" section under "WhatsApp" in the dashboard sidebar. Proceed to "Step 3: Configure webhooks to receive messages" in the API setup page.Click on the "Configure webhooks" button.Step 3: Edit Webhook Callback URLUnder the "Configuration" page, click on the "Edit" button.

A pop-up titled "Edit webhook's callback URL" will open.Enter the following information:Callback URL: https://api.v7.botpenguin.com/whatsapp/cloudVerify token: BOTPENGUINAfter entering the details, click on the "Verify and save" button.Step 4: Subscribe to Webhook FieldsOnce the webhook URL is saved, click on the "Manage" button to subscribe to the webhook fields.

When the "Webhook fields" pop-up appears, subscribe to all available fields.Save your selections.Congratulations! You have successfully subscribed to the webhook for your WhatsApp account on the Meta Dashboard. Now, you will be able to receive messages and notifications through the specified webhook URL (https://api.v7.botpenguin.com/whatsapp/cloud).Please note that the process of subscribing to webhooks may be subject to changes or updates in the Meta Dashboard. If you encounter any difficulties or issues during the process, refer to the official Meta documentation or contact BotPenguin support team for further assistance.

This document will guide you through the step-by-step process of updating the payment method on your WhatsApp account using the Meta Developer Dashboard. By following these instructions, you can set up or modify your payment method for WhatsApp services.Step 1: Access the Developer DashboardOpen your web browser and navigate to the Meta Developer Dashboard.Log in to your developer account using your credentials.Step 2: Navigate to WhatsApp API SetupOnce you are logged in, you will find the dashboard's sidebar.Click on the "API Setup" option under the "WhatsApp" section.Step 3: Add Payment MethodIn the WhatsApp API setup page, proceed to "Step 6: Add payment method."Click on the "Add payment method" button.Step 4: Access WhatsApp Account SettingsClicking on the "Add payment method" button will redirect you to the WhatsApp account settings page in "Meta Business Manager."In the "Meta Business Manager," locate and click on the "Payment Setting" button.Step 5: Navigate to Billing and Payments PageOn the "Billing and Payments" page, click on the "Add Payment Method" option to add a new payment method.Step 6: Select Payment Method TypeChoose the payment method type that you want to use for your WhatsApp account.Step 7: Enter Payment DetailsEnter the necessary payment details based on the selected payment method.Step 8: Verify Payment MethodOnce you have entered the payment details, proceed with the verification process.Step 9: Update Business InformationAfter successful verification, make any necessary updates to your business information.Congratulations! You have successfully updated the payment method on your WhatsApp account using the Meta Developer Dashboard. The new payment method is now set up for your WhatsApp services.Please ensure to keep your payment details secure and up-to-date. If you encounter any difficulties during the process or have further questions regarding payment methods on WhatsApp, please refer to the official Meta documentation or contact BotPenguin support team for assistance.

This document will guide you through the step-by-step process of granting control of a WhatsApp Business Account to a system user using the Meta Business Suite. By following these instructions, you can ensure that the system user has the necessary access to perform actions using a System User access token.Step 1: Access the Meta Business SuiteOpen your web browser and navigate to the Meta Business Suite. Log in to your Meta Business Suite account using your credentials.Step 2: Locate and

Access Business SettingsIn the Meta Business Suite, find the top-left dropdown menu that displays your business account name.Click on the Settings (gear) icon next to your business account name.Step 3: Navigate to Business SettingsAfter clicking the Settings (gear) icon, a dropdown menu will appear.Click on "Business settings" from the dropdown menu.Step 4: Create a system userNavigate to System Users "Users" in the sidebar. Click on "System Users" and click "Add" to add a new user
Accept the policy to start adding user
Once the "Create system user" pop-up opens, Give a name (E.g. BP-WhatsApp) and keep the user role as "Admin"
Once the system user is added, Click on the "Generate new token"
Once the "Generate Token" pop-up opens up,Select the App that you created earlier. Choose Token expiration as "Never"Assign following permissionsbusiness_managementcatalog_managementwhatsapp_business_messagingwhatsapp_business_management
Click "Generate Token"Copy the token and save it safely. Step 5: Access WhatsApp Business AccountsIn the Business settings page, navigate to the "Accounts" section.Click on "WhatsApp Accounts."Step 6: Assign a System UserOn the WhatsApp Accounts page, you will see a gray "Add People" button. Click on it.A list of available system users will appear.Step 7: Assign Full ControlSelect the appropriate system user from the list.Assign "Full control" permissions to the selected system user over the WhatsApp Business Account.Congratulations! You have successfully granted control of a WhatsApp Business Account to a system user. This allows the system user to access endpoints that require control of the WhatsApp Business Account using a System User access token.Please ensure to grant access to trusted and authorized system users only. If you encounter any difficulties during the process or have further questions regarding WhatsApp Business Account control, please refer to the official Meta documentation or contact their support team for assistance.
This document will guide you through the step-by-step process of copying essential details from the Meta Developer Dashboard. By following these instructions, you can retrieve important information necessary for integrating WhatsApp services into your application or business.Step 1: Access the Developer DashboardOpen your web browser and navigate to the Meta Developer Dashboard.Log in to your developer account using your credentials.Step 2: Navigate to WhatsApp API SetupOnce you are logged in, you will find the dashboard’s sidebar.Click on the "API Setup" option under the "WhatsApp" section.Step 3: Select Phone Numbers and Copy DetailsIn the WhatsApp API setup page, proceed to "Step 1: Select phone numbers."Select the correct "From" number from the available options.Copy both the "Phone number ID" and "WhatsApp Business Account ID" (WABA ID) displayed on the page.Step 4: Copy the "System User token" that you generated. if you missed the same, Visit below page ♀ Assign System User to WhatsApp AccountCongratulations! You have successfully copied the essential details from the Meta Developer Dashboard, including the "Phone number ID," "WhatsApp Business Account ID" (WABA ID), and "System User Token." These details are crucial for integrating and using WhatsApp services within your application or business.Please ensure to keep these details secure and do not share them with unauthorized parties. If you encounter any difficulties or have further questions regarding the Meta Developer Dashboard, please refer to the official Meta documentation or contact BotPenguin support team for assistance.
This document will guide you through the step-by-step process of creating the BotPenguin WhatsApp Bot using the WhatsApp Business Cloud API. Following these instructions, you can set up your WhatsApp Bot and integrate it with the BotPenguin platform.Step 1: Check for Pre-requisitesBefore you begin, ensure you have the necessary prerequisites in place, such as access to the BotPenguin platform, WhatsApp number, etc. Pre-requisitesBefore you start creating the WhatsApp bot, Make sure that you have A phone number that is Active & capable of receiving SMS.Not registered on WhatsApp or WA Business App.Registered legal businessAn active website with a valid privacy policyBusiness use case compliant with WhatsApp and Meta commerce policy. A valid payment method (Debit or Credit card) capable of making international payments to Meta for conversation charges.GSTIN Number, Only if the business is registered in India.If you have all of the above checked, You are good to start with WhatsApp Cloud API Bot.Please note that a single mobile number can only be utilized on one of the WhatsApp services at a given time, namely WhatsApp, WA Business, or WhatsApp Business API. If you wish to use your existing number, you must remove your account from one service before using it on another.Step 2: Create a WhatsApp bot & go through the WhatsApp Automated onboarding process2.1 Register your bot

on botpenguinLogin to your BotPenguin Portal and Click the "Create Bot" button on the top right.

Select "WhatsApp" as the platform on the next page.
Provide the required details and follow the bot creation process.Scan the QR Code and initiate a WhatsApp message to create the demo bot 1st. Upon successful verification, Click "Connect to your WhatsApp number" to start the Automated onboarding.2.2 Complete Meta Automated onboardingSelect all the pre-requisite and click "Proceed"
Choose Automated or Manual onboarding. In this document, We will talking about Automated onboard.

It will open up a new pop-up window where you have to complete the Meta onboarding. Please make sure that you have not blocked the pop-up window in your browser, If yes, Please enable the same.Upon successful completion, Your bot will be connected to WhatsApp. But as a last step, You have to update your payment method. Step 3: Update Payment Method to WhatsAppIn the Business Manager, update the payment method for your WhatsApp Business Cloud API account to enable seamless transaction processing.3.1 Access WhatsApp Account SettingsIn the "Meta Business Manager," locate and click on the "Payment Setting" button for your WhatsApp Account.3.2 Navigate to Billing and Payments PageOn the "Billing and Payments" page, click on the "Add Payment Method" option to add a new payment method.3.2 Select Payment Method TypeChoose the payment method type that you want to use for your WhatsApp account.3.3 Enter Payment DetailsEnter the necessary payment details based on the selected payment method.3.4 Verify Payment MethodOnce you have entered the payment details, proceed with the verification process.3.5 Update Business InformationAfter successful verification, make any necessary updates to your business information.You have successfully updated the payment method on your WhatsApp account.Congratulations! You have successfully created the BotPenguin WhatsApp Bot using the WhatsApp Business Cloud API and integrated it with the BotPenguin platform. Your WhatsApp Bot is now ready to interact with users and provide automated responses.Please note that specific steps and requirements may vary based on updates and changes in the BotPenguin and WhatsApp Business Cloud API platforms. If you encounter any difficulties during the process or have further questions, please refer to the official documentation of BotPenguin and WhatsApp Business Cloud API, or contact their support teams for assistance.
You can migrateAll message templates that were created on other platformAll the catalogues that were created while using other platforms.All the Whatsapp forms that were created while using other platforms.Blue tick, verified name and conversation limit.You cannot migrateYour campaigns and broadcast that were created on other platforms.Your chat flows that were created on other platforms. Steps to Migrate Whatsapp Account to BotPenguinLogin to your registered Meta Account.Under "Accounts" click on "Whatsapp Accounts".Select the Whatsapp account you want to migrate into BotPenguin.Then click on "Whatsapp Manager". It will be available in the bottom of the account information.Once clicked on "Whatsapp Manager". Go to settings and then go to Account tools in it.In "Phone Numbers", click on settings button for the phone number you want to migrate and select "Two-Step Verification".Now click on "Turn off two-step verification". You will receive an email to disable two-factor authentication.Login to your BotPenguin Portal and Click the "Create Bot" button on the top right.Select "WhatsApp" as the platform on the next page. Provide the required details and follow the bot creation process.Scan the QR Code and initiate a WhatsApp message to create the bot. Upon successful verification, Click "Connect to your WhatsApp number" to start the Automated onboarding.Select all the pre-requisite and click "Proceed"Choose Automated or Manual onboarding. In this document, We will talking about Automated onboard. It will open up a new pop-up window where you have to complete the Meta onboarding. Please make sure that you have not blocked the pop-up window in your browser. If yes, please enable the same.Now click on "Get Started" to continue connecting your account to BotPenguin.Now as a first step, fill your business information. Select the business portfolio which you want to connect with from the drop down. All your portfolios will be available in the drop down. Then enter a business name, website or profile link and select a country. Then click on "Next".Now from the drop down to select a WA business account choose "Create a WhatsApp Business Account" and also select "Create a new WhatsApp Business profile". And click on "Next".Now enter Whatsapp business account name and WA business display name. Then select the category of your business. And click on "Next".Now enter the phone number with country code that you want to add for Whatsapp. After that select a method you want to use to verify your number. You will receive an OTP. Here we selected Text

Message. After clicking on "Next" a pop up will be opened to enter the OTP received. Once the OTP is entered and your number is verified your new whatsapp bot will be successfully created.Note: In this process you will be asked to enter the OTP received on your registered phone number. Remember not to enter the OTP and hold this process.Update Payment Method to WhatsAppIn the Business Manager, update the payment method for your WhatsApp Business Cloud API account to enable seamless transaction processing.Access WhatsApp Account SettingsIn the "Meta Business Manager," locate and click on the "Payment Setting" button for your WhatsApp Account.Navigate to Billing and Payments PageOn the "Billing and Payments" page, click on the "Add Payment Method" option to add a new payment method.Choose the payment method type that you want to use for your WhatsApp account.Enter the necessary payment details based on the selected payment method.After completing the payment details you can go back and enter the received OTP that was asked earlier.Once you have entered the OTP. Click on Finish, and your bot will be migrated to BotPenguin.If OTP is expired and new OTP is not received, wait for 72 hrs before requesting a new OTP.Done! You have migrated your WhatsApp Bot into BotPenguin. If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.
You can Reconnect your Bot by following these easy steps.Login to BotPenguin app and go on Home section.Click on Bots section from the left panel. Select the WhatsApp bot you want to reconnect with your whatsapp number.Click on the dots in front of the bot as shown in the image and then click on "Reconnect".You will be redirected on whatsapp bot pre-requisites page. Check for all the requirements before proceeding.Click on "Proceed". Now select a method for setting up your phone number for whatsapp.Here, we have explained using "Connect with API key". Click on the button below.Now choose your Whatsapp API provider. Turn on the toggle that you have Whatsapp business APIClick on "Select API Provider" to select from the drop down. Here, we have selected Whatsapp Cloud API. Once API Provider is selected. You have to fill the requested information.Here, we have to enter phone number ID, enter your WhatsApp Business Account ID and System User Token.Now to gather the required details. Open your Meta account and login with your Meta Business Account.Now on Dashboard, click on Whatsapp and then select "API Setup".Now in API Setup, firstly select the whatsapp number you want to reconnect with.Then copy the phone number ID and Whatsapp Business Account ID and paste the same in BotPenguin.Click on "Generate Access Token" and this will give you a new access token. Copy the same and paste in BotPenguin.After completing all the steps and filling the required information. Click on "Submit". Done! You have successfully reconnected WhatsApp Bot into BotPenguin. If everything is correct and you are still unable to move forward, write to us at contact@botpenguin.com. We will respond back within 48 business hours.
Custom Attributes Custom Attributes in BotPenguin are user-defined properties or variables that can be assigned to individual users within your chatbot platform. These attributes enable you to capture and store specific information about users, which they share during chat or can be accessed from external databases. Custom Attributes are a powerful tool for personalizing interactions and creating tailored experiences for users in your chatbot.Types of Custom Attributes There are primarily two types of custom AttributesCustom Attributes whose values are being defined by the answers given by users in the chat flow. Custom Attributes whose values are being defined using the external API for any user. Primary UsageCustom Attributes can be used for the following use casesPersonalize user interactionsCollect user dataUse in the WhatsApp broadcast campaignsEnhance marketing, support, and engagementUse of external APIs in chat flowExport chat data that is not being exported by defaultCreate & Manage Attributes Custom attributes in BotPenguin allow you to personalize user interactions and collect specific data. Follow these steps to create and manage custom attributes:Step 1: Navigate to the BotPenguin dashboard.Log in to your BotPenguin account and access the dashboard.Step 2: Access Account Settings.On the side navigation bar, locate and click the "More" button.From the dropdown menu, select "Account/Settings."Step 3: Manage Custom Attributes.In the Account/Settings section, find and click on the "Custom Attributes" tab.Here, you’ll find a list of all your custom attributes. You can edit, delete, bulk delete, and add new custom attributes from this tab.Step 4: Create a New Custom Attribute.To add a new attribute, click the "Add Attribute" button.Fill in the following details:Attribute Key: This is the key that will be saved in the system. Keep it in lowercase characters without any special characters or spaces. For example, if you want to save the city for any user, you can use "city" as the attribute key.Attribute Name: This will be the display name of the attribute, such as "City Name."Optional Details to fill in for saving API Response in custom attributesSelect Bot: Choose the bot whose chat input you want to store.Select Flow:

Choose the flow of that bot.Select Question: Choose the question whose answer you want to store.Refer to the following help doc to understand how can you use custom attributes to save your API responses.   Call external APIs in your chat flowsAnd that’s it! You’ve successfully created a custom attribute in BotPenguin. This attribute can now be used to personalize interactions, segment users, and enhance the overall chatbot experience.

Currently, the API chat component is only being supported for WhatsApp Bot, Coming soon for the rest of the channels. What is an external API?An external API (Application Programming Interface) refers to a set of rules and protocols that allow one software application to interact and communicate with another external software system, service, or platform. It enables different software programs to access and exchange data and functionalities seamlessly, even if they are developed by different organizations or run on different servers.Types of APIsThere are several types of APIs, each serving specific purposes and use cases. We are currently supporting the JSON-based RESTful APIs with the API key, JWT Token, or public APIsWorkflows of using APIs in ChatFlowHere is the flow for using the APIs in the ChatflowsUsing APIs in the ChatflowsTo seamlessly integrate APIs into your chat flows in BotPenguin, follow these steps:Step 1: Access the BotPenguin DashboardLog in to your BotPenguin account and access the dashboard.Step 2: Navigate to the Developers SectionFrom the side navigation bar, locate and click on "More."Within the "More" section, select "Developers."Step 3: Prepare Custom AttributesBefore proceeding, ensure you have added all the necessary custom attributes that you’ll require for the API interactions. Custom attributes will help capture and manage data. Refer to the doc before creating and managing the custom attributes Manage & Use Custom AttributesStep 4: Add a New APIIn the "Developers" section, find "Your APIs" and click on "Add API" at the top right corner.Step 5: Configure Your APIUnder "Configure APIs," set the following details. The structure is similar to Postman for testing APIs:API Name: This is the display name for the API, used for better readability within BotPenguin.API Method: Specify the HTTP method (e.g., GET, POST, PUT).Enter API URL: Provide the URL for the API you intend to call.Query Parameters: Add any required query parameters.Headers: Include necessary headers for the API.Body: Define the request body if needed.Note: If you want to insert custom variables within the API, use "/" as a placeholder. However, for the initial setup, you’ll need to enter the actual values to test the API and save the response structure.Step 6: Test the APIProceed to "Manage API Response" and click on "Test" the API with actual values. This will help BotPenguin understand the API response structure.Step 7: Map API Response to Custom AttributesIn the "Manage API Response" tab, you can map the API response variables to your BotPenguin custom attributes.Step 8: Replace Actual ValuesIf required, replace the actual values in your API configuration with the custom attributes that you’ve mapped.Step 9: Access Your ChatflowNavigate to your Bot’s chatflow by clicking on "Edit your Chatflow" under the "Bots" section.Step 10: Select the "API" Chat ComponentIn the list of chat components, choose the "API" chat component.Step 11: Call the APIIn the right panel, call the API by selecting the API you’ve configured earlier by its name.Step 12: Map the next QuestionsMap the next question based on your API’s response code (e.g., 200, 300, etc.). If the API response code doesn’t match any predefined values, it will trigger the response mapped to "others."And you’re done! Your API is ready to enhance your chatbot’s functionality and provide dynamic interactions based on API responses.

Please note: Only the King (Paid) plan have the feature of having more than one team member (i.e. three), if you need more than that, Please request the BotPenguin support team for the same.User & RolesHere are brief definitions of users and Roles.Team Users are client team members with assigned roles and permissions within the platform. These roles define what actions they can perform and what they can access, such as configuring chatbots, managing content, or viewing analytics. Team Users in BotPenguin help streamline collaboration and access control in the chatbot building and management process.Team Roles are the module-based permission (such as view, edit, None) for any roles that can be assigned to different team members.Manage Roles & UsersIn BotPenguin, you can efficiently manage team roles and users to streamline access and permissions within your account. Here’s a step-by-step guide on how to do it:Step 1: Access the BotPenguin DashboardLog in to your BotPenguin account and access the dashboard.Step 2: Navigate to the "Team" SectionIn the dashboard, find and click on the "Team" section in the side nav bar.Step 3: Create a New RoleInside the "Team" section, navigate to "Roles" and click "Create Role."Step 4: Configure Role DetailsSet up the role by providing the following details:Name: Assign a name for the new role.Description: Add a brief description for reference.Assign Permissions: Customize permissions for this role based on your specific needs. Permissions are related to different modules within the BotPenguin platform.Step 5: Save the RoleAfter configuring the role details, click "Save" to create the new role.Step 6: Add a New UserOnce the role is created, go to the "Users" tab and select "Add User."Step 7: Fill User DetailsIn the "Add User" pop-up, fill in the following user details:Name: Enter the user’s name.Email: Provide the user’s email address.Phone Number: Add the user’s phone number.Select Role: Choose the appropriate role for the user.Password: Set a password for the user.Confirm Password: Confirm the password.Step 8: Create UserClick "Create User" to add the new team member to your BotPenguin account.Step 9: Manage Users and RolesYou can manage, edit, delete, or bulk delete users and roles from the same page, allowing you to fine-tune your team’s access and permissions.And there you have it! You’ve successfully created a new role and added a new user to your BotPenguin account. This streamlined management process helps you control access and permissions effectively.

BotPenguin AI BotPenguin utilizes a combination of ChatGPT, proprietary technology, and specialized training to create custom AI models tailored to your business’s unique knowledge and customer service needs.You can feed data to your custom AI model through various sources, including website URLs, content files, and FAQs. This enables BotPenguin to develop AI solutions that deliver exceptional service and support to your customers by leveraging both publicly available information and your business-specific data.Setup ChatGPT and AI Settings To integrate ChatGPT into your BotPenguin chatbot and customize its behavior, follow these steps:Step 1: Create Your BotsBegin by creating your chatbots. Once you’ve completed this step, proceed to the next.Step 2: Train Your AI ChatbotNavigate to the "Train your AI chatbot" section under the "Bots" category in the side navigation bar.Here, you can enhance your AI chatbot’s capabilities through various means:Upload Custom Content: You can upload your custom content to fine-tune your AI’s responses.Feed Data from Your Website: Utilize data from your website to improve the AI’s knowledge.Add Custom FAQs: Define specific FAQs to enhance your AI’s ability to provide information.Step 3: Configure AI SettingsAccess "AI Settings" based on the type of chatbot you’re setting up:For website chatbots, it’s located under "Website Chatbot Setting."For Facebook and Telegram bots, you can find it under "Train your AI Chatbot."For WhatsApp bots, head to "WhatsApp Bot Setting."In the AI Settings, you can define the following details:Configure Bot’s PersonalityAnswer LengthAnswer Perspective (1st person, 3rd person, etc.)ToneLanguageAnswer FormattingIncluded Sources for ResponseCustom Prompt InstructionsManage Unusual Chat ScenariosMessage for When Bot Can’t AnswerMessage for Responding to Inappropriate Language UsageChatGPT Model ConfigurationChatGPT API Key (Note: Billing must be active and valid for your key to work)ModelStep 4: Edit Your Chat FlowNavigate to the "Edit Your Chat Flow" section in the chatflow builder.Step 5: Add "ChatGPT" ComponentWithin the chatflow builder, add the "ChatGPT" component.Step 6: Configure ChatGPT ComponentDefine how many queries you want the chatbot to handle consecutively and specify when to invoke the ChatGPT component.You can invoke the ChatGPT component at multiple points in the chatflow as needed.And you’re done! Whenever the ChatGPT component is invoked, your custom-trained model will provide responses based on the settings and training you’ve configured, enhancing your chatbot’s conversational abilities.

Glossary:TitleMeaningTagsTags are used to assign a specific label or category to a chatStatusThe Status of each chat is a key feature for both individual agents and teams to track the current state of each conversationTeam MemberThe agents who are interacting with the users other then admin.Chat TranscriptThe document file of the chat between the user and bot that can be downloaded Step 1: Logging InTo begin using the live chat functionality, the agent must first be added as a member by the admin. The admin will provide the necessary credentials. Note : If you haven’t received them, please contact the admin to get access.

As soon as you log in to the page, you’ll see the "Go Online" button on the left-hand side. You can enable or disable this button based on whether you want to be available for live chat.Toggle ON: Indicates you are online and available to attend live chats.Toggle OFF: Indicates you are offline and unavailable to handle live chats.Step 2: Accessing the InboxOnce you log in "Inbox" , you will land up on the below shown page. This is where all the leads and chats from various platforms are listed. In the inbox, you will see following columns:Visitor’s name - It is the name of the lead who interacted with the bot.Email address - The email-id of the customer(if provided).Phone number - The phone number of the customer(if provided).Status - The Status of each chat is a key feature for both individual agents and teams to track the current state of each conversation. It helps to ensure that no chat is left unattended or missed.

You can mark status to particular chat from the dropdown or can create a new one as depicted in the screenshot below.Tags - Tags are used to assign a specific label or category to a chat, helping agents and team members quickly identify the topic or nature of the conversation. By assigning tags, you can "stamp" a chat with relevant information, making it easier to understand the context.

You can assign tags to particular chat from the dropdown or can create a new one as depicted in the screenshot below.Assigned to (Agent) - The name of the agent to whom the chat is assigned.Some basic UnderstandingIf the chat appears in bold that means the chat is still unread or the new chats.If a team member is already in conversation with the customer, then you cannot chat with that user until and unless the chat is transferred to you.Step 3: Managing ChatsEach chat in the inbox will have options for further action:You can assign tags to categorize or prioritize chats.You can change the status of the conversation (e.g., "Open," "In Progress," or "Resolved").You can assign the chat to another agent if needed.You can also download the chat transcript from the button given on the top bar.Transfer to bot - You can transfer the chat again to the bot once the live chat is over.Step 4: Filtering Chats in the InboxTo make it easier to manage and prioritize chats, we have a Filters section in the inbox. You can filter out chats based on various criteria, such as:Date & Time: Filter chats by the date and time they were received.Tags: Choose specific tags to view chats related to particular categories, such as product inquiries, support, or sales.Status: Filter chats based on their status (e.g., Open, In Progress, Resolved).Assigned Agent: Filter chats to see those assigned to a specific team member.This filtering functionality allows you to quickly narrow down and focus on specific chats that need attention, ensuring better organization and workflow.Step 5: Starting a Live ChatWhen a new lead or chat arrives, you will see a notification. You can choose to accept or reject the chat request.Accepting a Chat: Once accepted, you'll be directed to the chat interface where you can interact with the customer.Rejecting a Chat: If you reject the chat, the lead will be reassigned or notified as per your agency's settings.Step 6: Interacting with the CustomerInside the chat window, you'll have a message bar where you can type and send messages to the customer. Additionally, you can perform the following actions:Translation: You can translate the chat to your preferred language using the translate buttonQuick Reply: Use the quick reply feature for repetitive messages like greetings or common responses. Simply click on "Add New" to create a quick reply, which you can use whenever needed.Step 7: Additional FeaturesMessage Actions: Click the three dots on any message to access options such as forwarding, starring, copying, or deleting messages.Visitor Profile: View detailed information about the user you are interacting with, including location, phone number, and any custom attributes added.You can also edit these information by clicking on the edit icon and then save them by clicking on the save icon given.This guide provides a comprehensive overview of how a live agent can access and effectively use the Inbox panel to manage chats efficiently.

Before we start, Let's understand the basic workflow.Workflow for sending WhatsApp notificationsSetting up WhatsApp NotificationsTo create a notification bot with BotPenguin, follow these steps:Step 1: Get Your API KeyStart by obtaining your API key for integration. Refer to the below doc for more details WhatsApp Cloud APIStep 2: Setup the WebHook EndpointConfigure the WebHook endpoint where your bot will send and receive messages. Refer to the below doc for more details WhatsApp Cloud APIStep 3: Create Notification TemplatesEnsure you've created the required notification templates that your bot will use for messaging.Step 4: Retrieve Notification TemplatesCall the "Get Template API" to retrieve all the templates you've created. Refer to the below doc for more details GET Templates ListStep 5: Send MessagesUtilize the "POST WhatsApp Template API" to send messages using the templates. Refer to the below doc for more details POST WhatsApp Template MessageStep 6: Configure Webhook HandlingImplement the necessary code to handle the webhook on the configured endpoint. This is where your bot will receive and process incoming messages and notifications.Step 7: You're Done!With these steps completed, your notification bot is ready to send and receive messages using your templates, ensuring efficient and effective communication with your audience.

Phone Number Authentication SetupThis guide walks you through integrating an API for phone number verification within your flow. You'll set up two APIs—one to send the OTP and another to verify it. Follow these steps carefully.Step 1: Create the API for Sending OTPNavigate to Developer SectionGo to your platform's Developer Section.Add a New APIClick on the Add API button as shown in the screenshot Enter an API Name (e.g., "Send OTP").Configure API DetailsChoose the appropriate Method from the dropdown that is POSTIn the API URL field, enter the API endpoint provided for sending OTP.API : https://api.v7.botpenguin.com/integrations/custom-feature/send-otp-smsSet HeadersGo to the Headers section.Add the required authorization fields:Authorization Key: Enter the authorization key provided by

the service.Value: Your token or key.Define Request Body ParametersIn the Body section, enter the parameters as shown in the screenshot:accountSID: Obtain from Twilio.authToken: Obtain from Twilio.fromNumber: Your Twilio phone number.toNumber: Map this to the user’s phone number attribute.Save APIClick Save to store the API configuration.Map Phone Number AttributeIn the Attributes section, select the user’s phone number attribute.Save Custom AttributeIn the Manage API Response section, choose Save to Custom Attribute.If not already created, create a custom attribute to store the verification status or OTP code.Step 2: Create the API for OTP VerificationAdd Another API for OTP VerificationClick Add API again.Name this API (e.g., "Verify OTP").Set Method and URLChoose the appropriate Method (POST).Enter the API URL for verifying OTP.API : https://api.v7.botpenguin.com/integrations/custom-feature/verify-user-otpSet HeadersFill in the header details similar to Step 1.Define Request Body ParametersIn the Body section, pass:systemOtp: The OTP sent to the user.userOtp: The OTP entered by the user.Save APIClick Save.Step 3: Integrate APIs into the Chat FlowEdit the Chat FlowGo to Edit Flow and open the chat flow you want to edit.Add API ComponentsSend OTP API:Add the API component and select the API created in Step 1.Phone Number Input:Add a component to capture the user’s phone number.Verify OTP API:Add the API component again and select the Verify OTP API from Step 2.Add DelaysAdd a delay of 5 seconds between sending and verifying OTP, and 2 seconds if re-verifying.Response MessagesConfigure messages to display whether the OTP was verified successfully or if the user should re-enter it.This setup enables you to authenticate a user’s phone number seamlessly by sending and verifying an OTP.
Stay updated with the latest features, improvements, and releases!We’ve made some exciting updates to enhance your experience and ensure you get the most out of the platform. To explore the details of our latest release, click the link below:By clicking the link, you’ll find:A complete list of newly released features.Detailed descriptions of updates and improvements.How these updates can benefit your workflow.Don’t miss out on the latest enhancements!Looking for a new featurein case you have got any feature, you can raise the feature request using the below link   Feature RequestsReport a Bugin case you have got any bugs. Report us now; we. If will fix it asap Report a bug! Got any questions?If you can having any questions, you can look into our repository of FAQs; most likely, you will find your answer here, If not, write us at contact@botpenguin.com Frequently asked questions (FAQs)   ♂ Partner FAQs
In case, you have found any Bug in the platform, You can report the same as soon as possible. Report a BugAlternatively, You can share your bugs detail at contact@botpenguin.com.
Raise your feature request here using the below link; If we receive enough requests, we will roll out that feature for you. Alternatively, You can share your feature request at contact@botpenguin.com
Our team is working hard to provide you with the best product possible and with your input & support, we will make it the best. If you want to explore what we are working on and what are our upcoming features, Click the link belowLooking for a new featurein case you have got any feature, you can raise the feature request using the below link   Feature RequestsReport a Bugin case you have got any bugs. Report us now, we will fix it asap Report a bug! Got any questions?If you can having any questions, you can look into our repository of FAQs, most likely, you will find your answer here, If now, write us at contact@botpenguin.com Frequently asked questions (FAQs)   ♂ Partner FAQsRaise your feature request here using the below link; If we receive enough requests, we will roll out that feature for you. Raise New Feature RequestAlternatively, You can share your feature request at contact@botpenguin.com
Stay Connected with Us!Join us on our social media platforms to stay updated on the latest features, tips, and industry trends. Follow us for exciting updates, helpful resources, and to connect with our community. Let’s grow together!   Follow BotPenguin on Instagram!Get the latest updates, tips, and success stories. Stay connected and discover how BotPenguin can transform your business!
   https://instagram.com/iambotpenguinJoin Us on Facebook!Stay updated with our latest features, announcements, and success stories. Connect with the BotPenguin community and grow your business!
   https://www.facebook.com/botpenguinJoin Our Discord Community!Connect with fellow users, share feedback, and get real-time support. Be part of the conversation and stay updated on the latest news and features!   https://discord.gg/UpHr69QbConnect with Us on LinkedIn!Follow BotPenguin for industry insights, product updates, and professional growth tips. Let’s innovate and grow together!
   https://www.linkedin.com/company/botpenguinSubscribe to Our YouTube Channel!Explore tutorials, feature highlights, and expert tips to make the most of BotPenguin. Watch, learn, and elevate your chatbot experience!   https://www.youtube.com/@BotPenguinFollow Us on X (formerly Twitter)!Stay in the loop with the latest updates, tips, and trends. Join the conversation and share your thoughts with us!

https://twitter.com/imbotpenguinFollow Us on Pinterest!Discover creative ideas, tips, and inspiration for using BotPenguin to its full potential. Pin and grow with us!   https://www.pinterest.com/imbotpenguin/ Get User InboxThis API endpoint allows you to retrieve user data from the inbox. It provides various filtering options to customize the query.Endpoint URL: https://api.v7.botpenguin.com/inbox/usersHTTP Method: POSTRequest HeadersAuthorization: A bearer token is required for authentication. Replace [MASKED_TOKEN] with your valid API token. This token is used to authenticate and authorize the request.Request BodyThe request body should be a JSON object containing various filtering criteria to customize the query. Here’s a breakdown of the request body fields:searchText (string): Search text to filter users.tags (array): An array of tags to filter users.status (array): An array of status values to filter users.isOnline (boolean): Indicates whether users are online._botWebsite (array): Filter users based on interactions on the website._botWhatsapp (array): Filter users based on interactions on WhatsApp._botTelegram (array): Filter users based on interactions on Telegram._botFacebook (array): Filter users based on interactions on Facebook._agentAssigned (array): Filter users assigned to specific agents.segments (array): An array of segments to filter users.applicableFilters (array): An array of applicable filters.lastSeenAt (object): Date range filter for the last seen timestamp.createdAt (object): Date range filter for the creation timestamp.userInteracted (boolean): Indicates whether users have interacted.lastMessageBy (array): Filter users based on the last message sender.isLiveChatActive (boolean): Indicates whether live chat is active for users.hasOrdered (object): Filter users based on their order history.Sample RequestCopycurl ’https://api.v7.botpenguin.com/inbox/users’ \

```
  -X ’POST’ \
  -H ’Authorization: Bearer [MASKED_TOKEN]’ \
  -H ’Content-Type: application/json’ \
  -d ’{
    "searchText": "",
    "tags": [],
    "status": [],
    "isOnline": false,
    "_botWebsite": [],
    "_botWhatsapp": [],
    "_botTelegram": [],
    "_botFacebook": [],
    "_agentAssigned": [],
    "segments": [],
    "applicableFilters": ["userInteracted"],
    "lastSeenAt": {
      "startAt": "",
      "endsAt": ""
    },
    "createdAt": {
      "startAt": "",
      "endsAt": ""
    },
    "userInteracted": true,
    "lastMessageBy": [],
    "isLiveChatActive": false,
    "hasOrdered": {
      "status": false,
      "lastAt": ""
    },
    "page": 1,
    "isExport": "none",
    "isContact": true
  }’ \
  --compressed
```

Replace [MASKED_TOKEN] in the request with your actual API token and customize the request body filters as needed for your use case.ResponseThe API will respond with a JSON object

containing the user data based on the applied filters. The response format may vary depending on the data available and the applied filters.Please replace [MASKED_TOKEN] in the request with your actual API token for actual usage. Got any questions?If you have any questions, you can look into our repository of FAQs, most likely, you will find your answer here, If not, write us at contact@botpenguin.com
Get Segments/GroupsThis API endpoint allows you to retrieve segments for your BotPenguin application.Endpoint URL: https://api.v7.botpenguin.com/inbox/segmentsHTTP Method: GETRequest HeadersAuthorization: A bearer token is required for authentication. Replace [MASKED_TOKEN] with your valid API token. This token is used to authenticate and authorize the request.Sample RequestCopycurl 'https://api.v7.botpenguin.com/inbox/segments' \
  -H 'Authorization: Bearer [MASKED_TOKEN]' \
  -H 'Content-Type: application/json' \
  --compressedReplace [MASKED_TOKEN] in the request with your actual API token.ResponseThe API will respond with a JSON object containing the segments available in your BotPenguin application. The response format may vary depending on the segments you have configured.Please replace [MASKED_TOKEN] in the request with your actual API token for actual usage. Got any questions?If you have any questions, you can look into our repository of FAQs, most likely, you will find your answer here, If not, write us at contact@botpenguin.com
IntroductionThe Inbox User Import API allows you to import WhatsApp contacts into the BotPenguin platform. You can use this API to create or update WhatsApp contacts with various attributes and contact information.Base URLCopyhttps://api.v7.botpenguin.com/inbox/users/importAuthenticationTo use this API, you need to include the following authentication header:Authorization: Bearer TokenExample: Bearer eyJhbGciO*****InR5cCI6IkpXVCJ9...Request HeadersThe following request headers are required:Content-Type: application/jsonRequest DataThe request should include a JSON array of user profiles to be imported. Each user profile should have the following structure:CopyjsonCopy code[

```
  {
    "profile": {
      "userDetails": {
        "userProvidedName": "User Name",
        "contact": {
          "email": "user@email.com",
          "phone": {
            "number": "1234567890",
            "prefix": "91"
          }
        },
        "tags": [],
        "attributes": []
      }
    }
  }
```

]Example CURL RequestCopycurl 'https://api.v7.botpenguin.com/inbox/users/import' \

```
  -H 'Authorization: Bearer eyJhbGciOiJSUzUxMiIsInR5cCI6IkpXVCJ9...' \
  -H 'Content-Type: application/json' \
  -H 'Accept: */*' \
  -H 'Origin: https://app.botpenguin.com' \
  -H 'Referer: https://app.botpenguin.com/' \
  -H 'Sec-Fetch-Dest: empty' \
  -H 'Sec-Fetch-Mode: cors' \
  -H 'Sec-Fetch-Site: same-site' \
  -H 'User-Agent: Your User-Agent' \
  --data-raw '[{"profile":{"userDetails":{"userProvidedName":"User Name","contact":{"email":"user@email.com","phone":{"number":"1234567890","prefix":"91"}},"tags":[],"attributes":[]}}}]' \
```

  --compressedResponseThe API will respond with a status code and a JSON response body. The response body will contain information about the import operation.Status Codes:200 OK: The import

operation was successful.Example ResponseCopyjsonCopy code{
  "status": "success",
  "message": "User profiles imported successfully."
}ConclusionThe Inbox User Import API allows you to easily import user profiles into the BotPenguin platform. Make sure to follow the authentication and data format guidelines for successful imports. Got any questions?If you have any questions, you can look into our repository of FAQs, most likely, you will find your answer here, If not, write us at contact@botpenguin.com

Update User StatusThis API endpoint allows you to update the status of users in your BotPenguin application.Endpoint URL: https://api.v7.botpenguin.com/inbox/users/status-updateHTTP Method: PUTRequest HeadersAuthorization: A bearer token is required for authentication. Replace [MASKED_TOKEN] with your valid API token. This token is used to authenticate and authorize the request.Request Bodyids (array, required): An array of user IDs that you want to update the status for.status (string, required): The new status for the specified users (e.g., "DELETED").subscriberIds (array, optional): An array of subscriber IDs associated with the users.Sample RequestCopycurl
'https://api.v7.botpenguin.com/inbox/users/status-update' \
  -X 'PUT' \
  -H 'Authorization: Bearer [MASKED_TOKEN]' \
  -H 'Content-Type: application/json' \
  --data-raw '{
    "ids": ["640f472d173951357f08edee"],
    "status": "DELETED",
    "subscriberIds": ["640f479fa79ef02edfb33dfc"]
  }' \
  --compressedReplace [MASKED_TOKEN] in the request with your actual API token, and modify the request body as needed.ResponseThe API will respond with a confirmation of the status update for the specified users. The response format may vary depending on the status update operation performed.Please replace [MASKED_TOKEN] in the request with your actual API token for actual usage. Got any questions?If you have any questions, you can look into our repository of FAQs, most likely, you will find your answer here, If not, write us at contact@botpenguin.com

Get the essentials first!To use the BotPenguin APIs, You need to insure that you have following details with you. A. UUID - You can get the UUID from the local web session storage as show in the image below:B. Bot ID & User ID: One can get the Bot ID and User ID from your Bot Script or Bot page URL. Below is the sample Example. For Chatbot page URLCopy// Chatbot Page URL Structure

https://page.botpenguin.com/BotId/CustomerId

// The first value after .com is the BotId and second value is the CustomerId.For Chatbot ScriptCopy// Chatbot Script Structure

<script id="BotPenguin-messenger-widget" src="https://cdn.botpenguin.com/botpenguin.js" defer>BotId,CustomerId</script>

// The first value after defer> is the BotId & second value is the CustomerId.C. Auth Token: We haven't automated everything yet. Please contact our support team to get the same. Now you are ready to run the POCAPI ReferencesPlease use the below APIs in order to play with your leads and chat data. Create a lead in the BotPenguinAs soon as any user opens up the Bot, It creates one UUId; pass the same along with the other required details to create and update the lead's details. API to update a chat/lead dataPUT https://api.v7.botpenguin.com/inbox/direct/leadAs soon as any user opens up the Bot, It creates one UUId; pass the same along with the other required details to create and update the lead's details. HeadersNameTypeDescriptionx-bp-token*StringAPI TokenRequest BodyNameTypeDescriptionuuid*StringUnique ID of a chat userbotId*StringUnique ID of the bot customerId*StringUnique ID of the customer accountagentIdBooleanUnique ID of the agent assignednameStringName of the leademailStringEmail of the leadphoneStringPhone number of the leaddialCodeStringDial Code including "+" signnotesArray<{title: string, description: string}>Additional notes for the chatstatusStringValid status for the chat. Available values: 'OPEN', 'INPROGRESS',

’REVIEW’, ’ONHOLD’, ’DEPENDANCY’, ’CLOSED’pictureStringA valid image HTTP URLtagsArray<String>Additional tags for the chatattributesArray<{key: string, value: string}>Custom attributes for the chat200: OK API successfully processed400: Bad Request Bad request/parameters401: Unauthorized Unauthorized requestCopy


```
{
  "success": true,
  "message": "ok",
  "code": 200
}
```


Copy

```
{
  // Response
}
```

Copy

```
{
  // Response
}
```

Get leads listing and Its meta dataTo get the listing of the leads and its meta data, Hit the below API with mandatory details. API to get listing of chats/leadsGET https://api.v7.botpenguin.com/inbox/direct/chatsTo get the listing of the leads and its meta data, Hit the below API with mandatory details. Query ParametersNameTypeDescriptionbotId*StringUnique ID of the bot customerId*StringUnique ID of the customer accountpage*StringPage numbertype*String"lead" to fetch only leads"non-lead" to fetch non lead chatsHeadersNameTypeDescriptionx-bot-token*StringAPI Token200: OK API successfully processed400: Bad Request Bad Requests/Parameters401: Unauthorized Unauthorized requestCopy


```
{
  "success": true,
  "message": "ok",
  "data": [
    {
      "_id": "63d9ffa77a8d152facbe2f2f",
      "uuid": "7e88d192-9b20-4035-9b68-d4ac3d58a34f",
      "createdAt": "2023-02-01T05:59:03.533Z",
      "isOnline": false,
      "lastMessage": {
        "at": "2023-02-01T06:00:20.000Z",
        "by": "bot",
        "text": "Welcome to BotPenguin. I am here to help you."
      },
      "lastSeenAt": "2023-02-01T06:00:21.000Z",
      "profile": {
        "notes": [
          {
            "title": "Sample title",
            "description": "Sample description",
            "_id": "63db5c4abcbc3be2e95b20ae"
          }
        ],
        "userDetails": {
          "name": "Sample name",
          "picture": "my-picture",
          "contact": {
            "email": "Sample email",
            "phone": {
              "number": "Sample number",
              "prefix": "91"
            }
          },
          "city": "Sample city",
          "country": "Sample country",
          "gender": "MALE",
          "tags": [
            "Sample tag"
```

            ],
            "attributes": [
                {
                    "key": "ID",
                    "value": "BP001"
                }
            ]
        }
    },
    "status": "INPROGRESS",
    "updatedAt": "2023-02-02T06:46:34.119Z",
    "websiteVisits": 1,
    "_agentAssigned": "631aa793bcfa100487d13d0d"
  }
 ],
 "code": 200
}Copy{
 // Response
}Copy{
 // Response
} Got any questions?If you have any questions, you can look into our repository of FAQs, most likely, you will find your answer here, If not, write us at contact@botpenguin.com

1. Create and Sync TemplatesThe team will be required to create and get the templates approved by the Facebook WhatsApp Business Manager or BotPenguin Dashboard. Once It is done,Go to BotPenguin PanelNavigate to WhatsApp Automation and Then go to the manage section.Under templates, You will be required to sync templates from Facebook, Once Done, App should use the get Templates API and save the template details. These details will be required to send Notifications.2. API KeyIn order to generate the WhatsApp API key,Go to the BotPenguin Dashboard (https://app.botpenguin.com/)Find your bot and go to WhatsApp Bot Settings section.Under WhatsApp Bot Settings, Navigate to the API key and Click on generate an API key.You will require to update the webhook URL, on which we will send the delivery reports.Once done, Copy the key and save it yourself.3. APIs Endpoints GET Templates ListPOST WhatsApp Template MessagePOST Send Message APIError CodesPlease refer to the link below for more info on the error codeshttps://developers.facebook.com/docs/whatsapp/on-premises/errors

API End PointCopyhttps://api.v7.botpenguin.com/whatsapp-automation/wa/templates?apiKey=*API KEY*Request HeadersHeaderDetailsapiKeyAPI KEYQuery ParamsHeaderDetailsapiKeyAPI KEYExamplesRequestCopycurl --location --request GET
’https://api.v7.botpenguin.com/whatsapp-automation/wa/templates?apiKey=*API KEY*’ \\
--header ’apiKey: *API KEY*’ResponseBodyCopy{
 "success": true,
 "data": [
  {
    "_id": "62b5c16bf1d8decfa9a72335",
    "_user": "61c1c2058e0c5a1e9bb420f8",
    "configuration": {
        "name": "uniform_update",
        "category": "APPOINTMENT_UPDATE",
        "language": "en",
        "header": "text",
        "textHeader": "Hey how are you",
        "media": "",
        "mediaHeader": {
            "image": "",
            "video": ""
        },

"body": "Hi I’m Joey\\nHow you doiiin",
"footer": "thank you",
"button": "",
"ctaButtonType": [],
"ctaButton": [],
"quickReply": [
{
"id": "",
"text": ""
}
]
},
"whatsAppId": "Xk4qPq8u0HJbsIWcYgazd5ZDAK",
"status": "APPROVED",
"namespace": "b676ea4e_f9ce_44c8_b187_b98b40f85f9f",
"createdAt": "2022-06-24T13:51:39.610Z",
"updatedAt": "2022-06-24T13:52:19.838Z",
"__v": 0
},

]
}HeaderHeaderDetailsX-Powered-ByExpressVaryOriginAccess-Control-Allow-Credentialstrue_user61c1c2058e0c5a1e9bb420f8Content-Typeapplication/json; charset=utf-8Content-Length7146ETagW/"1bea-RhtE+UK94qGji1CaCyMvUWBM3E8"DateWed, 03 Aug 2022 11:16:13 GMTConnectionkeep-aliveKeep-Alivetimeout=5
Parameter DescriptionuserName: refers to the name of the user we intend to send the messagewa_id: refers to the WhatsApp number of the user we intend to send the message NOTE: The number must contain the country code without the plus signtemplateId: refers to the ID of the template NOTE: Template must be approved before using this APIassingTo : refers to the email of custom user or agent.params: is used for the variables used in the template, it is an empty array in the case of a plain text template with no variables. In case of variables in the template, please refer to the JSON belowtags: refers to label you can assign to conversations or chats to help organize and manage effectively.API EndpointCopyhttps://api.v7.botpenguin.com/whatsapp-automation/wa/send-template?apiKey=*API KEY*Request HeadersHeaderDetailsapiKeyAPI KEYQuery ParamsHeaderDetailsapiKeyAPI KEYBodyCopy{
"userName": "Divyansh Test",
"wa_id": "9175080****",
"templateId": "62b5c16bf*****cfa9a72335",
"params": [
{
"type" : "header",
"parameters": [
{
"type": "document",
"document": {
"link": "<https://www.africau.edu/images/default/sample.pdf>"
}
}
]
},
{
"type": "body",
"parameters": [
{
"type": "text",

```
                    "text": "Abc"
                },
                 {
                    "type": "text",
                    "text": "def"
                },
                 {
                    "type": "text",
                    "text": "Monday"
                }
            ]
    }
  ],
  "assignTo": "example@gmail.com",
  "tags": [ "test" ]
}ExamplesRequestCopycurl --location --request POST
'<https://api.v7.botpenguin.com/whatsapp-automation/wa/send-template?apiKey=> *Shared Separately*'
\\
--header 'apiKey: *API KEY*' \\
--header 'Content-Type: application/json' \\
--data-raw '{
   "userName": "Test",
   "wa_id": "91885917****",
   "templateId": "63dba1617****52face07078",
   "params": [
      {
         "type": "header",
         "parameters": [
            {
                    "type": "document",
                    "document": {
                    "link": "<https://www.africau.edu/images/default/sample.pdf>"
                    }
            }
         ]
      },
      {
                "type": "body",
                "parameters": [
                   {
                    "type": "text",
                    "text": "Abc"
                   },
                    {
                    "type": "text",
                    "text": "def"
                   },
                    {
                    "type": "text",
                    "text": "Monday"
                   }
                ]
      }

   ],
```

"assignTo": "example@gmail.com",
"tags": ["test"]
}'ResponseHeadersHeaderDetailsX-Powered-ByExpressVaryOriginAccess-Control-Allow-Credentialstrue
_user61c1c2058e0****e9bb420f8_bot62e77a807f1****ecce980f0whatsAppId****bsIWcYgazd5ZDAKContent-Typeapplication/json;
charset=utf-8Content-Length507ETagW/"1fb-urlVjgGZAUBRNyxQDAOnZ3ONF1I"DateWed, 03 Aug 2022 11:16:13 GMTConnectionkeep-aliveKeep-Alivetimeout=5
API EndpointCopy<https://api.v7.botpenguin.com/whatsapp-automation/wa/send-message?apiKey=*API KEY*>
Request HeadersHeaderValueapiKey*API KEY*Content-Typeapplication/jsonPlain Text MessagesMedia MessagesRequest BodyCopy{

```
  "userName": "Test",
  "wa_id": "910987654321",
  "type": "text",
  "message": {
     "text": "hi"
  },
  "tags": [ "test" ]
}
```

ParametersParameterTypeDescriptionuserNamestringThe name of the user to whom the message is being sent.wa_idstringThe WhatsApp number of the user to whom the message is being sent. The number must contain the country code without the plus sign.typestringThe type of message being sent (e.g., text, image).message.textstringmessage that needs to sentmessage.labelstringThe caption you want to send along with the image
(optional) Only if type is imagemessage.sourcestringThe image link
(optional)
Only if type is imagetagsarrayTags are the labels that you can assign to conversations or chats to help organize and manage effectively.ExampleCopycurl --location

```
'https://api.v7.botpenguin.com/whatsapp-automation/wa/send-message?apiKey=*API KEY*' \
--header 'apiKey: *API KEY*' \
--header 'Content-Type: application/json' \
--data '{
  "userName": "Test",
  "wa_id": "918859170007",
  "type": "text",
  "message": {
     "text": "hi"
  }
  "tags": [ "test" ]
}'
```

Request BodyCopy{

```
  "userName": "Test",
  "wa_id": "910987654321",
  "type": "image",
  "message": {
     "source": "https://imgv3.fotor.com/images/blog-cover-image/part-blurry-image.jpg",
     "label": "hey",
  }
```

}ParametersParameterTypeDescriptionuserNamestringThe name of the user to whom the message is being sent.wa_idstringThe WhatsApp number of the user to whom the message is being sent. The number must contain the country code without the plus sign.typestringThe type of message being sent (e.g., text, image, document).message.sourcestringThe URL of the media being sent.message.labelstringThe text to attach to the media.message.typestringThe type of media being sent (e.g., image, document).ExampleCopycurl --location
'<https://api.v7.botpenguin.com/whatsapp-automation/wa/send-message?apiKey=*API KEY*>' \\\\

```
--header 'apiKey: *API KEY*' \\\\
--header 'Content-Type: application/json' \\\\
--data '{
    "userName": "Test",
    "wa_id": "910987654321",
    "type": "image",
    "message": {
        "source": "<https://imgv3.fotor.com/images/blog-cover-image/part-blurry-image.jpg>",
        "label": "hey",
        "type": "image"
    }
}'
```

Error CodesRefer to the official documentation for more information on error codes.

PrerequisiteBefore you start, Make sure that you have decided which type of partner you want to be with. Once you have finalized the same review the partner pricing and get the commercials sign-off. Here is the link to learn about the pricing and types of the partners. Become a Partner | Chatbot Partnership Program | BotPenguin BotPenguin Partnership ProgrammeRegister yourself as a partnerFollow the given steps to register yourself as a BotPenguin partner. 1. Setup your company detailsOpen the onboarding page of BotPenguin using the following link https://start.botpenguin.com/Fill in your company details as requested. Business Name: It will be your company name and will be used in all the invoices that will be issued to you or from your company. Business Address: It will be your company address and will be used in all the invoices that will be issued to you or from your company. Name: Name of agency panel administratorEmail: Email of agency panel administratorPassword: Password of agency panel administrator

Once you have filled the details, Click "Continue"2. Verify administrator's emailOnce you have signed up, You will receive a verification link in your email. Click on the verification option and verify your email.In case you haven't received the verification email, check your spam folder. You can also recent verification link from the onboarding panel.You can request a verification code only once in two minutes.3.
Set up your customer portalYou won't be able to change your partnership type once signed up.Once you verify your email, you will be navigated to the customer portal setup page. Choose what type of partner you want to sign up for. If you have selected for affiliate Partner, you will be redirected to the signup page for affiliate partners. If you have selected for implementation partner, your account will be automatically created and you will see the link to access your agency panel.If you have selected for white label partner, you will be navigated to the next page where you can set up your brand details.4. Set up your brand detailsOnce you are on the customer portal setup page, fill in the necessary required details and click continue.Customer Portal Name: Your brand name which will replace BotPenguinLogin URL: Login URL for your customers which will replace https://app.botpenguin.com/Website: Your brand website details which will replace https://botpenguin.com/Customer Support Email: All the emails to your customers will be sent from this email and will show as a support email.Customer Support Phone: It will show as a support phone number.Portal Language: It will be the default language for customersBrand Logo: Your brand logo which will replace the BotPenguin Logo

Once you have added all the details, click the Save & Proceed button.Now your setup is completed and now you will see the below screen , after that click on the" Close & Login to your Panel" and you will be redirected to your login page.5. Login in your PanelOnce you click on the button showed above, you will be redirected to the Login page of Partner PanelNow fill in the required details and click on "Login" button and your will be able to access your partner Dashboard.Connect to your DomainOnce you have updated all the details and your domain is ready to use, you will receive an email from the BotPenguin team, and Done!Please feel free to reach out to us at contact@botpenguin.com, in case of any questions or concerns.
If you've partnered with BotPenguin and need help with -Creating new plans for your customersManaging your customers' plansEditing existing plansUnderstanding complex termsYou're in the right place. This guide will walk you through each step.Understanding Key terms:FeaturesUse casesStatusa. Active: Plan

Visible to customers b. Inactive: Plan Hidden from customersArchiveSimilar to the Delete featureAdd-onAdd extra features to your current planIntegrationConnect your bot with listed Apps/CRMsConfigurationSet up invoice details and configure the customer pricing pagePayment Grace periodExtra days given to customers to continue services after their plan expiresRecommend PlanPromote the plan you want customers to chooseFeature RestrictionSet limits for the number of messages for chatbotsGetting StartedLog in using your domain to access your dashboard.Partner's DashboardRecent Sign Ups/ Customers: Access customer information in the Recent Sign Ups section or by clicking "customers" in the left sidebar.Plans: You can create new plans and edit your existing plans by clicking on "Plans" in the left sidebar.Let's start Creating a new Personalized Plan.Create Your PlanUpon clicking on "Plans" in the left sidebar, you will see the Subscription Management screen. Here, you can manage your Plans, Add-ons, Invoices, and Configurations.Plan: You can view all your existing plans in the "Plan" section, where you can edit or create new plans.Add-on: Add-on feature helps you to enhance your customer's experience by increasing the number of messages or expanding the number of conversations in your plans.Invoices: You can find all your customer's invoices under "Invoices" section.Configuration: You can manage and take actions on the plans.Here are a few quick steps for you to complete your configuration.   Configuration is a one-time step, but it is mandatory for creating plans.Step 1: Click on the "Configuration" panel to add your Invoice Details, add your taxes, manage payment reminders and customer pricing page configurations.Complete the invoice details.At the bottom, you can add your company's logo.Step 2: Click on "Taxes" and add Taxes. Then click on "Currency & Payment Reminders" and complete it.Payment Grace Period: After the customer's plan expires we give some days time to the customer to continue services and pay for the renewed plan.Step 3: Click on "Customer pricing page configuration" and fill it in according to your need.Recommended Plan: You can promote the plan you want customers to buy more.Click on "Update" and this completes your Configuration step.Now click on the "Plan" panel and then click on the "Create New Plan" button to start creating your new plan.Copy Create New PlanStep 1: Click on "Plan Basics" and fill in the following details:-Step 2: Click on "Features" to choose the platforms and features for your plan. Likewise, click on "Integrations" to select the integrations for this plan.Step 3: Click on "Feature Restrictions" and set limits for the number of messages for Website & WhatsApp, platform bots, contacts, and integrations so that customers will be compelled to buy higher plans.   Hover on   to know more about each fieldStep 4:Click on "Review Plan" to check the details of your plan.Make sure to click on "Create Plan" to create your plan.Step 5: Your plan "Test" has been created. You can now perform the following actions with this plan:-Make this plan default. When you set a plan as default, your customers will receive this plan initially when they create their chatbot. The default plan must have zero priceSet status to active.Click on the "three-dot icon" to duplicate or archive this plan.Step 6: To modify your current plan, simply click on the icon indicated below.   Existing plans can only be edited until their status is not activeNow we can move ahead on how to manage customer's plans:Manage Your Customers' PlansStep 1: Click on "Customers" in the left sidebar, and then select the customer for plan management.Step 2: Click on "Subscription" in the left sidebar, then click on the "Current Plan" panel to view the customer's current plan.Step 3: Go to the "Plan" panel to view plan details. Choose your plan and click "Upgrade Plan".Step 4: Choose the payment option to upgrade your customer's plan.If everything appears correct but you are still unable to proceed, please contact us at support@botpenguin.com. Our support team is here to assist you with any issues or questions you may have.

Pre-requisitesBefore you connect your domain to the BotPenguin white label panel, please ensure that you have the following details. Copy all the Cname records that were shown on the BotPenguin onboarding panel.

Find out who is your domain provider (e.g Godaddy, Name Cheap)Find out from where your DNS settings of the domain are being managed. Usually, DNS settings are managed by the domain provider itself. However, it can be changed to another third-party service provider. Connect your domain to BotPenguin Whitelabel PanelTo connect the domain with the BotPenguin white label panel, you have to update the DNS records (that are being provided while onboarding on the BotPenguin) to the DNS settings of your domain. You can find help links for how to update the DNS Records below for some of the top domain providers.Domain ProviderHelp LinkGoogle Domainshttps://support.google.com/a/answer/47283?hl=enNamecheaphttps://www.namecheap.com/support/knowledgebase/article.aspx/9646/2237/how-to-create-a-cname-record-for-your-domain/Godaddyhttps:

//in.godaddy.com/help/add-a-cname-record-19236CloudFlarehttps://developers.cloudflare.com/dns/manage-dns-records/how-to/create-dns-records/BlueHosthttps://www.bluehost.com/help/article/dns-management-add-edit-or-delete-dns-entriesHostgatorhttps://www.hostgator.com/help/article/how-to-change-dns-zones-mx-cname-and-a-recordsSitegroundhttps://www.siteground.com/kb/manage-dns-records/Dreamhosthttps://help.dreamhost.com/hc/en-us/articles/360035516812-Adding-custom-DNS-recordsDynadothttps://www.dynadot.com/community/help/question/set-up-DNSIn case you are unable to find your domain provider above or are unable to update the DNS settings, please contact our support team at contact@botpenguin.com for further assistance.

BotPenguin uses many third-party applications to enhance the functionality and features of the platform. here is the documentation on how you can connect to these integrations.3rd Party Integrations & Its UsecaseHere is the list of applications that BotPenguin used along with their use cases3rd Party ApplicationUse CaseHelp LinkAWS SESTo send emails to the customersSetup AWS SES AccountChatGPTFor enhanced AI capabilitiesSetup ChatGPT AccountZoho OAuthFor Zoho integrations such as Zoho CRM, Projects Setup Zoho IntegrationsGoogle OAuthFor Google integrations such as calendar, contactsSetup Google OAuth AppFacebook AppCreating Facebook botsWhatsApp AppCreating WhatsApp botsInstagramCreating Instagram botsContact BotPenguin Support TeamRazorPayCollecting payments from customersSetup RazorPay AccountStripeCollecting payments from customersSetup Stripe AccountWordpressFor wordpress bots-PabblyPabbly integration for customer-ZapierZapier integration for customers-ShopifyShopify integration for customers-Woo-CommerceWoo-commerce integration for customers-If you do not find a help link for any Integration, Please contact the BotPenguin support team at contact@botpenguin.com, for further assistance as it might require more developer assistance.

Required information for integrationTo do AWS SES integration, you will need the following detailsFrom emailAWS regionAccess keySecret keySteps to complete integrationStep 1: Set up your AWS accountNavigate to the following link to create your AWS account.Step 2: Verify your domain and emailDomain Verification:Log in to the AWS Management Console:Go to the AWS Management Console.Navigate to the Amazon SES console.Verify a Domain:In the SES console, navigate to the "Domains" section.Click on the "Verify a New Domain" button.Enter Domain Name:Enter the domain name you want to verify.Click on the "Verify This Domain" button.Add DNS Records:AWS SES will provide you with DNS records (TXT records) that you need to add to your domain’s DNS settings.Copy the provided records and add them to your DNS provider (e.g., Route 53, GoDaddy, etc.).Wait for Verification:It might take some time for DNS changes to propagate. Wait until the domain is verified in the SES console.Email Address Verification:Log in to the AWS Management Console:Go to the AWS Management Console.Navigate to the Amazon SES console.Verify an Email Address:In the SES console, navigate to the "Email Addresses" section.Click on the "Verify a New Email Address" button.Enter Email Address:Enter the email address you want to verify.Click on the "Verify This Email Address" button.Confirmation Email:AWS SES will send a verification email to the specified address.Open the email and click on the verification link provided.Wait for Verification:After clicking the verification link, wait for the email address to be verified in the SES console.Note:Verification processes may vary slightly depending on updates to the AWS SES console.Ensure that you have the necessary permissions to modify DNS records for domain verification.Step 3: Set up SES CredentialsTo create an IAM user with full access to AWS SES (Simple Email Service) but without console access, you can follow these general steps. Please note that you should have appropriate IAM permissions to perform these actions:Create a New UserIn the IAM console, click on "Users" in the left navigation pane.Click on "Add user" to create a new user.Enter a username for the new user.Choose the type of access (programmatic access for AWS CLI, SDK, etc.).Step 3: Attach Existing PoliciesOn the "Set permissions" page, select "Attach existing policies directly."In the search box, type and select "AmazonSESFullAccess." This policy grants full access to SES.You can also create a custom policy with the required SES permissions if needed.Review and CreateClick through the remaining steps to review your choices.On the last step, review the details and click "Create user."Step 5: Download or Copy Access CredentialsAfter creating the user, you’ll be prompted to download the access credentials (Access key ID and Secret access key).Important: Ensure you securely store these credentials as they will be needed for programmatic access.Step 4: Obtain the necessary DetailsGet the access key and secret keyClick on the IAM user for which you want to create access keys.Go to the "Security credentials" tab.Under the "Access keys" section, click on "Create access key."After creating the access key, you’ll be prompted to download the credentials.If you don’t download

them, you can copy the access key ID and secret access key manually.Get AWS RegionThe SES resources (email sending, etc.) are associated with a specific AWS region. Identify the AWS region where you want to use SES.This information can be found in the AWS Management Console, typically at the top right corner.Get From EmailFrom email is the same as the email that you have created in verified entities.Step 5: Save the configurationOnce you have all the details, Save them on the BotPenguin agency panel. Done!Reach out to us at contact@botpenguin.com for any further assistance.
Required information:To connect with Google reCAPTCHA, you will require the following details:reCAPTCHA Client IDreCAPTCHA Client Secret.Steps to complete connection:Step 1: Register your websiteNavigate to the following link to register your website on google.After that you will land on the page shown below and you to fill in the following details:LabelDomain nameAfter filing in the details :Agree to the Terms and Condition by checking in the boxThen click on the "SUMBIT" button.After Sumbitting you will get the required keys for the Google reCAPTCHA Connection:Step 2: Login to BotPenguin’s Platform Visit the website and log in to your account using your credentials.Step 3: Navigate to Third-Party Integration SectionOnce logged in, navigate to the settings or configuration section of the BotPenguin platform. Look for the option related to third-party integrations.Step 4: Search for Google reCAPTCHA ButtonIn the third-party integration section, locate the option for Google reCAPTCHA integration by searching in the search boxStep 5: Click on the Connect ButtonOnce you find the Google reCAPTCHA integration option, click on the "Connect" button associated with it. This action will initiate the integration process.Step 6: Fill in the Key DetailsAfter clicking on the connect button, you’ll be redirected to a page where you need to fill in key details obtained from the Google reCAPTCHA website. Step 7: Save and ConfirmAfter entering the required details, save your settings by clicking on the "Add" button provided.After clicking the "Add" button, your Google reCAPTCHA is now successfully connected.
ChatGPT is being used to enhance the bot’s AI Capabilities. As of now, We give the option to the customer to create the bot and have a free demo till 100 messages. Your API Key will be used for those 100 Free messages consumed by your customers. Here is how you can set it up. Required information for integrationTo do AWS SES integration, you will need the following detailsChat GPT API KeySteps to complete integrationStep 1: Setup your ChatGPT AccountBefore you create your API key, You need to set up your OpenAI (ChatGPT) account 1st. You can set it up using the following link. https://platform.openai.com/In case, you need help creating the Open AI Account, Use the following documentation by meta for the same. Step 2: Create API KeyOnce you are logged in to the portal, Follow the below steps to generate the key. Navigate to the "API Keys" option on the side navigation bar.

Now click on the "Create new secret key" under API Keys section.

Name the API Key and click "Create Secret Key".

 Copy the API key shown and save it safely with you.

Step 3: Integrate API Key on BotPenguinNavigate to BotPenguin Agency Panel with your URL and Go to "Configurations".

Enter the key and Click "Connect" and Your Integration is Ready. Reach out to us at contact@botpenguin.com for any further assistance.
We have multiple integrations that work with Zoho such as Zoho Projects, CRM, etc. To use that integration, the Zoho OAuth app is required. Here is what you need to do the integration.Required information for integrationTo enable Zoho integration, you will need the following detailsZoho Client ID Zoho Client Secret Zoho Extention URLSteps to complete integrationStep 1: Setup API CredentialsNavigate to the following link https://api-console.zoho.com/Once you are logged in to the Dashboard, click on the "Add Client" on the top right. In case, You do not have the account, set up your Zoho account and then Proceed.

Choose the client type as "Server based applications"

Fill following details while creating a new client.Client Type: Server-based applicationsClient Name: Name of your Brand (e.g. BotPenguin)Home Page URL: Your Main App URL (e.g. https://app.botpenguin.com/)Authorized Redirect URIs: {YOUR APP URL}/zoho-crm.html (e.g. https://app.botpenguin.com/zoho-crm.html)Upon successful creation, A new page will open up with the following details. Copy and save them safely as you need the same later while Integrating. Client ID Client Secret

Enable all the data centers under settings as per your need. Step 2: Create Zoho ExtentionOnce you have created the client ID and Client Secret, Let’s Create the Zoho CRM extension. Open the following URL on your browser https://sigma.zoho.com/Once you are logged in to the Dashboard, click on the "New Extension" on the top right. In case, You do not have the account, set up your Zoho account and then Proceed.

Fill in the following details and click "Create"Name: Name of your extension (e.g BotPenguin)Unique Name space: Any unique identifier (e.g botpenguin)Description: Your Brand DescriptionService: Zoho CRM

Once your extension is created, Choose Extention and Click on the "Edit" icon.

Follow the following next steps for setting up the "Button". This button will allow your customers to open up BotPenguin inbox and send WhatsApp messages from Zoho CRM self. Click on the "Links & Button" tab and then click on the "Create New Button" on the top right.

Fill following details for "Create new Button" option

In which module would you like to create a new button?: "Contacts"What would you like to name the button? : Name as you want (e.g Send WhatsApp)Where would you like to place the button?: "View Page"What action would you like the button to perform?: "Invoke a Widget"Create Connected App: Put the following details to create connected apps

Connected App Name: Your brand name (e.g BotPenguin)Description: Your sample descriptionChoose Hosting: ExternalSpecify Base URL for Sandbox: {YOUR APP DOMAIN}/widgets/zoho-crm (e.g https://app.botpenguin.com/widgets/zoho-crm)Specify Base URL for Production: {YOUR APP DOMAIN}/widgets/zoho-crm (e.g https://app.botpenguin.com/widgets/zoho-crm)Modifiable: YesSubmit the details and your connected apps will get created. Now move to the last option on the sidebar "Publish" and Click on the "Publish" buttom on the top right

Put the release notes (e.g Initial version released) and click "Confirm"

Upon clicking the "Confirm" button, You will see the "Extention URL ". Copy the same and save it safely with you. This will need to be added to the BotPenguin.Step 3: Save the configuration on the BotPenguin Agency PanelLogin to the BotPenguin agency dashboard with your URL and find the "Zoho" configuration under the "Configurations" section.

Click "Add" once you have added the configuration and you are done. Please feel free to reach out in case of any further assistance to contact@botpenguin.com.

We have multiple integrations that work with Google such as Google Calender, sheet, etc. To use that integration, the Google OAuth app is required. Here is what you need to do the integration.Required information for integrationTo enable Google integration, you will need the following detailsGoogle Client ID Google Client Secret Steps to complete integrationStep 1: Setup API CredentialsNavigate to the development console using the link below Follow the below official documentation of Google to create the OAuth CredentialsPlease note of following details while creating the OAuth CredentialsCredential Type: OAuth Client ID Application Type: Web ApplicationName: Your Brand Name (e.g BotPenguin Production)Authorized JavaScript origins: Your main app domain (e.g https://app.botpenguin.com)Authorized redirect URIs: The following URLs are to be added.{Your App Domain}/google-redirect.html (e.g. https://app.botpenguin.com/google-redirect.html){Your App Domain}/authentication (e.g. https://app.botpenguin.com/authentication){Your App

Domain}/google-contacts.html (e.g. https://app.botpenguin.com/google-contacts.html){Your App Domain}/google-sheets.html (e.g. https://app.botpenguin.com/google-sheets.html){Your App Domain}/google-task.html (e.g. https://app.botpenguin.com/google-task.html){Your App Domain}/google-calendar.html (e.g. https://app.botpenguin.com/google-calendar.html){Your App Domain}/google-analytics.html (e.g. https://app.botpenguin.com/google-analytics.html)Enabled API & Services Google Sheets APIGoogle Tasks APIGoogle Calendar APIPeople APIFirebase Cloud Messaging APIFirebase Installations API

OAuth Consent ScreensUser Type: ExternalApp Name: Your brand Name (e.g BotPenguin)App Domain: Your domain (e.g botpenguin.com)Authorized Domain: Your domain (e.g botpenguin.com)Step 2: Save configurations in BotPenguinOnce you have the API credentials which you can generate in Step 1, Save the configuration on the BotPenguin Agency Panel. Navigate to the BotPenguin agency panel & under "Configurations" and move to the "Google" tab. Fill in the asked details and click "Add Details"

Once you save the same, It is done! Step 3: Get the OAuth Screen VerifiedOnce you are done with the above steps, Add a developer account and Create the demo videos using the same. Proceed to submission of the OAuth consent screen Approval and Get it verified.Here is the list of scope that needs to be added while submitting for approvalRequired Scopes Non-sensitive scopes/auth/calendar.settings.readonly/auth/drive.file/auth/userinfo.profileSensitive scopes/auth/calendar/auth/calendar.events/auth/spreadsheets/auth/spreadsheets.readonly/auth/tasks/auth/tasks.readonlyRestricted scopesNone

If you want to collect the payment from your customer online, BotPenguin provides two payment gateways to collect payment. The following details are required to set up the Razor pay account.Required information for integrationTo enable Razorpay integration, you will need the following detailsAccess KeySecret KeySteps to complete integrationStep 1: Setup Razorpay AccountFollow the below official documentation to create the account. Step 2: Generate Secret KeyFollow the below official documentation to create the account. Step 3: Save configurations in BotPenguinOnce you have the access key & secret key which you can generate in Step 2, Save the configuration on the BotPenguin Agency Panel. Navigate to the BotPenguin agency panel & under "Configurations" and move to the "Stripe" tab. Fill in the asked details and click "Add Details"
Once you save the same, It is done!
Feel free to reach out in case of any further assistance at contact@botpenguin.com
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Once you save the same, It is done!
Feel free to reach out in case of any further assistance at contact@botpenguin.com
Facebook App is needed with valid permission & advance access for the setting of the WhatsApp Automated onboarding and Facebook Bot. Here is the pre-requisites and process for the same.Pre-RequisitesTo enable Facebook App integration, you will need the following detailsRequired Details for Integration on the BotPenguin PortalApp IDApp SecretSystem User TokenApp Config IDOther Required DetailsApart from the above, You will require the following to make your integration work properly.Verified Meta Business ManagerValid Privacy Policy and Terms & Conditions linkAdvance permissions Approval from Metawhatsapp_business_messagingpublic_profileemailwhatsapp_business_managementcatalog_managementpages_manage_metadatapages_messagingBusiness Asset User Profile Accesspages_user_localepages_user_timezonepages_user_genderpages_read_engagementbusiness_

managementpages_show_listSteps to complete integrationStep 1: Setup your Meta AppFollow the steps given in the below document to create your Meta app.   Create a Meta AppStep 2: Setup System User TokenFollow the steps given in the below document to create your system user token. Meta System User TokenStep 3: Create the App Configuration for WhatsApp Automated OnboardingFollow the steps given in the below document to create and get an App Config ID. Create Facebook Login for Business ConfigurationStep 4: Share the details for Approval & Further ConfigurationOnce you have completed the above steps, share the access of the business manager for further configuration along with a valid privacy policy and terms & conditions link. Here is a guide on how you can share the access. You have to share access on the following email. ajaysudhakar941@gmail.com Got any questions?If you have any questions, you can look into our repository of FAQs, most likely, you will find your answer here, If not, write us at contact@botpenguin.com.
Disclaimer
Please be aware that some or all portions of this document have been sourced from Meta’s official documentation. The original content can be accessed directly from the official Meta documentation available at https://developers.facebook.com/docs/This document will guide you through the step-by-step process for creating the configuration and Get App Config ID. Step 1: Create Facebook Login for Business ConfigurationLoad your app in the App Dashboard on https://developers.facebook.com/Add the Facebook Login for Business productStep 2: Setup ConfigurationClick "Configurations" on the side panel under the Facebook login for business.

Click + Create configuration
Name your configuration
Choose WhatsApp Embedded Signup login variation

Set the token duration to "Never".

Select the assets your app needs access to (i.e WhatsApp Account & Catalogues)Select the permissions your app needs:
whatsapp_business_managementwhatsapp_business_messaging catalog_managementClick Create and save the configuration ID

Your config ID has been created, save it safely as it will be used in the integration.

This document will guide you through the step-by-step process for creating the access token. Step 1: Access the Meta Business SuiteOpen your web browser and navigate to the Meta Business Suite. Log in to your Meta Business Suite account using your credentials.Step 2: Locate and Access Business SettingsIn the Meta Business Suite, find the top-left dropdown menu that displays your business account name.Click on the Settings (gear) icon next to your business account name.Step 3: Navigate to Business SettingsAfter clicking the Settings (gear) icon, a dropdown menu will appear.Click on "Business settings" from the dropdown menu.Step 4: Create a system userNavigate to System Users "Users" in the sidebar.
Click on "System Users" and click "Add" to add a new user
Accept the policy to start adding user
Once the "Create system user" pop-up opens, Give a name (E.g. BP-WhatsApp) and keep the user role as "Admin"
Once the system user is added, Click on the "Generate new token"
Once the "Generate Token" pop-up opens up,Select the App that you created earlier. Choose Token expiration as "Never"Assign following permissionswhatsapp_business_messagingpublic_profileemailwhatsapp_business_managementcatalog_managementpages_manage_metadatapages_messagingBusiness Asset User Profile Accesspages_user_localepages_user_timezonepages_user_genderpages_read_engagementbusiness_managementpages_show_listSkip the permission if you do not find the same in the list. Click "Generate Token"Copy the token and save it safely. This is your System User Token which will be used to create the Bot.
We are updating the documentation for this page. Please come back after some time.

If you’ve partnered with BotPenguin and need help with -Creating new plans for your customersManaging your customers’ plansEditing existing plansUnderstanding complex termsYou’re in the right place. This guide will walk you through each step.Understanding Key termsFeaturesUse CasesStatusa. Active: Plan Visible to customers b. Inactive: Plan Hidden from customersArchiveSimilar to the Delete featureAdd-onAdd extra features to your current planIntegrationConnect your bot with listed Apps/CRMsConfigurationSet up invoice details and configure the customer pricing pagePayment Grace PeriodExtra days given to customers to continue services after their plan expiresRecommended PlanPromote the plan you want customers to chooseFeature RestrictionsSet limits for the number of messages for chatbotsGetting StartedLog in using your domain to access your dashboard.Recent Sign Ups/ Customers: Access customer information in the Recent Sign Ups section or by clicking “customers” in the left sidebar.Plans: You can create new plans and edit your existing plans by clicking on "Plans" in the left sidebar.Let’s start Creating a new Personalized Plan.Create Your PlanUpon clicking on “Plans” in the left sidebar, you will see the Subscription Management screen. Here, you can manage your Plans, Add-ons, Invoices, and Configurations.Plan: You can view all your existing plans in the "Plan" section, where you can edit or create new plans.Add-on: Add-on feature helps you to enhance your customer’s experience by increasing the number of messages or expanding the number of conversations in your plans.Invoices: You can find all your customer’s invoices under “Invoices” section.Configuration:Here are a few quick steps for you to complete your configuration.<aside> Configuration is a one-time step, but it is mandatory for creating plans.</aside>Step 1: Click on the “Configuration” panel to add your Invoice Details, add your taxes, manage payment reminders and customer pricing page configurations.Complete the invoice details.At the bottom, you can add your company’s logo.Step 2: Click on “Taxes” and add Taxes. Then click on “Currency & Payment Reminders” and complete it.Payment Grace Period: After the customer’s plan expires we give some days time to the customer to continue services and pay for the renewed plan.Step 3: Click on “Customer pricing page configuration” and fill it in according to your need.Recommended Plan: You can promote the plan you want customers to buy more.Click on “Update” and this completes your Configuration step.Now click on the “Plan” panel and then click on the “Create New Plan” button to start creating your new plan.Step 1: Click on “Plan Basics” and fill in the following details:-Step 2: Click on "Features" to choose the platforms and features for your plan. Likewise, click on "Integrations" to select the integrations for this plan.Step 3: Click on "Feature Restrictions" and set limits for the number of messages for Website & WhatsApp, platform bots, contacts, and integrations so that customers will be compelled to buy higher plans.<aside> Hover on to know more about each field</aside>Step 4**:** Click on "Review Plan" to check the details of your plan.Make sure to click on "Create Plan" to create your plan.Step 5: Your plan "Test" has been created. You can now perform the following actions with this plan:-Make this plan default. When you set a plan as default, your customers will receive this plan initially when they create their chatbot.<aside> The default plan must have zero price</aside>Set status to active.Click on the “three-dot icon” to duplicate or archive this plan.Step 6: To modify your current plan, simply click on the icon indicated below.<aside> Existing plans can only be edited until their status is not active</aside>Now we can move ahead on how to manage customer’s plans:Manage Your Customers’ PlansStep 1: Click on “Customers” in the left sidebar, and then select the customer for plan management.Step 2: Click on "Subscription" in the left sidebar, then click on the "Current Plan" panel to view the customer’s current plan.Step 3: Go to the "Plan" panel to view plan details. Choose your plan and click "Upgrade Plan".Step 4: Choose the payment option to upgrade your customer’s plan.If everything appears correct but you are still unable to proceed, please contact us at support@botpenguin.com. Our support team is here to assist you with any issues or questions you may have.

What is the BotPenguin Partnership Program?The BotPenguin Partnership Program is a mutually beneficial partnership between you and BotPenguin where you effectively promote BotPenguin and receive a percentage of the revenue along with other benefits depending of type of partnership.What types of partnership are there with BotPenguin and how can you become partner?You can partner up with BotPenguin In three waysYou can become an affiliate partner, Spread awareness, Be an active promoter, Build the BotPenguin community and pass on relevant leads. You can become a white label Partner, Sell BotPenguin’s chatbot as your product with our white label suite. Create your brand and pricing. You can become an implementation partner, Sell custom chatbots as a chatbot provider, and boost your revenue with our guidance and support.Why should I partner up with BotPenguin?Here are the following reasons why BotPenguin is your ideal partnerBotPenguin is an omnichannel platform. Hence, your clients can be

present across all social media platforms 24X7, 365 days. When it comes to customers, a crucial part is constantly showing up to solve any queries. With BotPenguin, it’s a piece of cake!You don’t need a technical background or to learn coding to use BotPenguin. We have a no-code, intuitive, and easy-to-use platform. Setting up a chatbot is faster and easier than ever before!As a BotPenguin Partner, you get high incentive margins and the flexibility to set your pricing.BotPenguin can easily work with all the major and popular platforms like Zoho, Agile CRM, Bitrix24, etc. Our Numerous integrations and native APIs enable you to handle all your customer support under one roof.We believe in transparency and building lasting relationships. Hence, at Botpenguin, you getWe believe in transparency and building lasting relationships. Hence, at Botpenguin, you getRobust Support For All Queries And IssuesTransparent Incentive StructureWhat do I have to do as a BotPenguin partner?The following will be your responsibilities as a partner for BotPenguinAs an affiliate partner You, Will, be responsible for propagating BotPenguin on various digital channels. You’ll become an active promoter and spread awareness about BotPenguin. You’ll be responsible for Referring all relevant leads to the BotPenguin team. Moreover, You will be an active contributor and builder to the BotPenguin community. As a White Label Partner Sell BotPenguin’s Chatbot as your product with our White Label Suite. Create Your Brand and pricing for a chatbot line. As an Implementation Partner Sell custom chatbots as a chatbot provider, and boost your revenue with our guidance and support.How do I make money with the BotPenguin Partnership Program?You get a fixed share of revenue whenever you bring in a lead or onboard a client. You can find the incentive structures For The Partnership program in the proposal we will share with you. If you haven’t received one, contact us at contact@botpenguin.com.
What integrations are available with Emperor compared to KING?Emperor offers additional AI features, ChatGPT integrations, more integrations and messages compared to King Plan.Can customers integrate their own GPT4 account?Yes, customers can integrate their own GPT4 account.Are there any fees for using the Payment Gateway?Stripe and RazorPay can be integrated into your system without any additional charges.Is the Early Bird Pricing a one-time thing?No, the prices will remain consistent for existing partners for the initial two years.Does the platform offer APIs for seamless integration with other marketing tools and software?We offer over 60 integrations on the platform. If you need integration with any other marketing tool, please share the details, and we will handle it as part of custom development.Can the platform integrate with our CRM system for seamless customer data management?Yes, you can integrate your CRM system with the platform using custom apps integration. We can also assist with the integration if neededWhat security measures are in place to protect user data and ensure privacy?We follow GDPR compliance and store data in encrypted format on our AWS server to ensure security and privacy.Is the platform compliant with GDPR and other data protection regulations?Yes, the platform is GDPR compliant, and we are working on making it HIPAA compliant as well.What analytics and reporting capabilities does the platform provide?We provide extensive analytics and reporting capabilities, which can be explained in a demo call.Can the platform provide real-time analytics for monitoring campaign performance?Yes, the platform can provide real-time analytics for monitoring campaign performance, but this may require custom development.Can the platform support two-way communication for engaging with customers?Yes, the platform supports two-way communication, allowing you to engage with customers effectively.If I reply to clients directly using my WhatsApp Business account without using BotPenguin, will I still be charged?Yes, regardless of whether you use BotPenguin or reply directly through your WhatsApp Business account, you will still be charged for conversations that occur beyond the 24-hour window.If a user replies to my WhatsApp message after 24 hours, will I still be charged for the conversation?Yes, if a user replies to your WhatsApp message after 24 hours, you will still be charged for the conversation, even if the user initiated the contact.Can I use the chatbot in Arabic after connecting ChatGPT?Yes, you can use the chatbot in Arabic after connecting ChatGPT. Make sure to select Arabic as the language for your chatbot.I am not able to use ChatGPT4 as it is grayed out. How can I use ChatGPT4? Do I need to use an API key for the ChatGPT-powered bot?If ChatGPT4 is grayed out, it may indicate that it’s not available or activated for your account. You may need to contact support for assistance or check your plan’s features to see if ChatGPT4 is included. Additionally, yes, you may need to use an API key for a ChatGPT-powered bot, depending on the integration method.If I take the King plan, will I get 3000 messages in one chatbot, or will each chatbot get 3000 messages?The message allocation typically applies to the entire account, not individual chatbots. So, with the King plan, you’ll receive a total of 3000 messages for all your chatbots combined.Can I connect the chatbot with Instagram?Yes, you can connect your chatbot with Instagram.

BotPenguin provides integration options for various platforms, including Instagram. You may need to check the specific integration settings in your BotPenguin dashboard.How can we change the messaging when customers click to talk to a live agent?For website bots, navigate to the website bot settings.Look for the "General Settings" section.Within the general settings, you’ll find the field to customize the messaging for when customers click to talk to a live agent. Update the message according to your preference.How to call external APIs in custom attributes?To call external APIs in custom attributes, you’ll typically need to use the appropriate API integration features provided by BotPenguin. This may involve configuring webhooks or API endpoints within your bot’s settings and specifying the desired API calls in your custom attribute logic. You may also need to consult BotPenguin’s documentation or support resources for detailed guidance on this process.In order to integrate with GPT, do I need to have a paid plan on GPT?Yes, to integrate with GPT (likely referring to ChatGPT or a similar service), you need to have a paid plan on GPT. Paid plans usually offer access to advanced features and APIs required for integration purposes.

What is the BotPenguin Chatbot Affiliate Program?Our Chatbot Affiliate Program allows partners to spread awareness about BotPenguin, generate interest, expand the community, and earn commission for converted leads.How do I become a Chatbot Affiliate Partner?You can become an Affiliate by applying to BotPenguin’s Affiliate Program and meeting the eligibility criteria.What is the eligibility criteria for becoming a Chatbot Affiliate?Eligibility criteria include having a website, blog, social media following, or a network of contacts, and adhering to BotPenguin’s terms and conditions.How do I earn commission as a Chatbot Affiliate?You earn commission as an Affiliate by generating leads and marketing BotPenguin to prospective customers.How does BotPenguin support its Affiliates?BotPenguin provides its Affiliates with marketing materials, support, and guidance to help them spread awareness, generate leads, and earn commission. When you become an Affiliate, you join a family, feel free to ask us anything.Can I promote BotPenguin on any platform?Yes, you can promote BotPenguin on any platform, including your website, blog, social media, email marketing, and more.

However, the content and platform should not be explicit, or objectionable in any way. If found so, there can be legal ramifications.What types of leads should I generate as a Chatbot Affiliate?You should generate leads who are interested in chatbots, artificial intelligence, customer service automation, and related topics. Anyone who will be willing to upgrade to a paid plan, as your commission depends on their purchases.How do I track my performance as a Chatbot Affiliate?You can track your performance as a Chatbot Affiliate through BotPenguin’s Affiliate Dashboard, which provides insights on leads generated, conversions, and commission earned.Is there a limit to the amount of commission I can earn as a Chatbot Affiliate?No, there is no limit to the amount of commission you can earn as a Chatbot Affiliate.Can I become a Chatbot Affiliate if I am not a BotPenguin customer?Yes, you can become a Chatbot Affiliate even if you are not a BotPenguin customer.

What is our chatbot implementation partner?Our chatbot implementation partner is a company or individual that offers chatbot solutions developed by BotPenguin to their clients. With BotPenguin’s chatbot implementation partner program, you can offer your clients market-leading chatbot solutions and grow your revenue exponentially.What benefits do I get with the chatbot implementation partner program?With BotPenguin’s chatbot implementation partner program, you get the additional brand visibility of the market-leading platform, easily integratable chatbot solutions, the ability to decide your own selling price, and robust support and guidance from our team. You can offer bundled deals to your clients and grow your revenue exponentially.Can I integrate the chatbot solutions with my existing tech solutions?Yes, you can easily integrate the chatbot solutions with your existing tech solutions and offer bundled deals to your clients. This can help you expand your business and increase revenue exponentially.How do I become a chatbot implementation partner?To become a chatbot implementation partner with BotPenguin, you can share your details and intent for the partner program on our website. Once you sign up, our team will get in touch with you to discuss the details and benefits of the program.Can I decide my own selling price for the chatbot solutions?Yes, with BotPenguin’s chatbot implementation partner program, you can decide your own selling price for the chatbot solutions. This gives you the freedom to set your own margins and grow your revenue exponentially.What level of support do I get with the chatbot implementation partner program?With BotPenguin’s chatbot implementation partner program, you get robust support and guidance from our team. We provide you with all the necessary resources to launch and sell the chatbot solutions, and our team is always available to answer any questions or concerns you may have.Can I offer bundled deals to my clients with the chatbot implementation partner program?Yes, with BotPenguin's chatbot implementation partner program, you can offer bundled deals to your clients. This can help you increase revenue and provide more value to your clients.What kind of chatbot solutions can I offer with the chatbot implementation partner program?With BotPenguin's chatbot implementation partner program, you can offer a range of chatbot solutions, including custom chatbots, lead generation chatbots, customer support chatbots, and more. Our chatbot solutions can be easily integrated with your existing tech solutions, making it easy for you to offer a seamless experience to your clients.

Can I integrate the whitelabel chatbot with my existing tech solutions?Yes, you can easily integrate the whitelabel chatbot with your existing tech solutions and offer bundled deals to your clients. This can help you expand your business and increase revenue exponentially.What level of support do I get with the whitelabel chatbot reseller program?With BotPenguin's whitelabel chatbot reseller program, you get robust support and guidance from our team. We provide you with all the necessary resources to launch your chatbot solutions, and our team is always available to answer any questions or concerns you may have.Is the whitelabel chatbot reseller program suitable for startups?Yes, the whitelabel chatbot reseller program is suitable for startups as well as established businesses. With BotPenguin's whitelabel chatbot reseller program, you can launch your own chatbot in just a day, with full control over the product, and at your own terms and price. This can help you establish your brand and generate revenue from day one.Can I customize the whitelabel chatbot to suit my business needs?Yes, you can fully customize the whitelabel chatbot to suit your business needs. With BotPenguin's whitelabel chatbot reseller program, you get a fully customizable product that can be tailored to meet your business requirements. You can add your own branding, design, and features to the chatbot solution, and offer your clients a personalized experience.How much does it cost to become a whitelabel chatbot reseller?The cost to become a whitelabel chatbot reseller may vary depending on your business needs and requirements. However, BotPenguin offers affordable and flexible pricing plans to suit businesses of all sizes. Contact us to learn more about our pricing plans and how we can help you launch your own chatbot solutions under your brand name.Can I whitelable 2 brands?Certainly, "whitelabeling two brands is permissible, but it's essential that the details, including email, domain name, and contact information, differ for each."Can I use my own domain?Yes, you can use your own domain for your bot. After setting up your account, you'll have the option to customize your bot's URL with your domain name. This allows you to maintain brand consistency and provide a seamless experience for your usersWhat does "Sign-Up Interface" mean?The "Sign-Up Interface" enables users to conveniently register on your website simply by clicking on the designated signup button.What does "Branded Help Documentation" include?The "Branded Help Documentation" includes personalised help guides featuring your branding, comprehensive step-by-step tutorials of the platform. (excluding tutorial videos).What does "Branded Wordpress Integration" mean?It means that your application will be showcased on the WordPress store, prominently featuring your brand's name and logo.What is "3rd Party Native Integration"?It means that your application will be made available on various third-party stores, prominently displaying your brand's name and logo.What does "Additional Live Chat Agent" mean?This feature allows you to acquire additional login accounts for live chat agents, facilitating enhanced customer support capabilities. Please note that additional charges may apply for this option.What does "Domain Migration of your Partner panel" mean?This service entails our assistance in migrating your panel in the event of a domain name change, ensuring seamless continuity in your operations.Can we customize the branding of the platform?Yes, you can customize the platform with your own logo and domain. You can even create your own subscription plans with your preferred currency and pricing.Can we customize the management dashboard?The management dashboard is not customizable out-of-the-box, but we can customize it through custom development if needed.

What is the Whitelabel WhatsApp Chatbot Program?Our Whitelabel Whatsapp Chatbot Program is a customized chatbot solution that can be rebranded and resold under your own brand. BotPenguin offers a whitelabel chatbot reseller program for businesses to offer their own chatbot solutions.Is there a limit on the number of messages that can be sent with the Whitelabel Whatsapp chatbot reseller program?No, there is no limit from our side on the number of messages that can be sent with the Whitelabel Whatsapp chatbot reseller program.Can I become a WhatsApp chatbot reseller with BotPenguin?Yes, BotPenguin offers a chatbot reseller program that allows businesses to become resellers and offer customized chatbot solutions to their clients.How can I become a WhatsApp Whitelabel partner with BotPenguin?To become a WhatsApp Whitelabel partner with BotPenguin, you can sign up for their chatbot reseller program and start offering customized chatbot solutions to your clients.Is the whitelabel chatbot reseller program limited to Whatsapp?No, the whitelabel chatbot reseller program offered by BotPenguin is not limited to Whatsapp. We offer whitelabel chatbot solutions for various messaging platforms.How does the whitelabel chatbot reseller program work?The whitelabel chatbot reseller program offered by BotPenguin allows businesses to offer customized chatbot solutions to their clients under their own brand. The businesses can resell these solutions at their own price and earn profits.Can I customize the chatbot solutions offered by the Whitelabel chatbot reseller program?Yes, the chatbot solutions offered by the whitelabel chatbot reseller program can be customized to suit the branding and messaging needs of the reseller's clients.What are the benefits of becoming a WhatsApp Whitelabel chatbot reseller with BotPenguin?Becoming a Whitelabel chatbot reseller with BotPenguin offers several benefits, including the ability to offer customized chatbot solutions under your own brand, the potential to earn profits by reselling these solutions, and the flexibility to customize these solutions to suit your clients' needs.

What is iOS & Android Mobile Apps for agents with branding (per year) For BotPenguin users, we offer a mobile application to manage live chats, contacts, and teams. Similarly, partners can avail an add-on to have a custom-branded application, empowering their clients to conveniently manage chats on the go.Can we manage our own database & controlPartners can opt for this add-on to host their white-label account and clients' data on their servers, ensuring enhanced security and compliance with specific country policies.Can you create chatflow for our client (We will Create Chatflow for you (per chatflow))?This add-on provides end-to-end chat flow creation for partners' clients, incorporating default chat components, offering extensive assistance when needed.What is branded Facebook App (per year)?We create a branded plugin application for Facebook, simplifying automated chatbot integration for partner clients. Partner clients receive manual integration as default.What is branded WordPress Integration (per year)?We create a branded plugin application for WordPress, simplifying automated chatbot integration for partner clients. Partner clients receive manual integration as default.What is Branded Shopify Integration (per year)?We create a branded plugin application for Shopify, simplifying automated chatbot integration for partner clients. Partner clients receive manual integration as default.What is branded Help Documentation (per year)?Partners will get the help resource centre and knowledge base (https://help.botpenguin.com/) with their branding, Note - Videos will not be rebranded under this add-onWhat is 3rd Party Native Integration (each) (per year)?Partners can choose from our existing integrations portfolio to automate processes for their clients apart from their default integrations as per their plan, providing added value.What is 3rd Party Custom App Integration (man hrs cost)Partners can request custom integrations for specific client needs, and we'll develop and implement them through this add-on.What is customized "powered by" line in chatbots (per month) ?This add-on allows partners to display "Chat Powered by [Partner's Brand Name]" on their customer chatbot window, enhancing brand visibility. By default, it is blank for themWhat is custom-built templates (10 templates)?Partners can have chat flow templates from various industries, domains etc and make them default, enabling their clients to use and customize them, saving time and effort.Affiliate & Implementation Partner Panels (per year)?Partners can efficiently add and manage resellers and partners for their chatbot business through dedicated panels.What is product Website for your Whitelabel Suite (5 pages) ?Partners desiring a dedicated website for their chatbot business can opt for this add-on, streamlining the process.What is additional Live Chat Agents (per month)?In case partners exhaust their default allotted live agents as per their plan, they can take up this add-on to accommodate additional live agents to their clients.What is whatsApp Onboarding & Support (per Account)?We offer assistance to partner clients for the WhatsApp chatbot setup process, ensuring a smooth implementation.

What happens when I downgrade a plan?When you request to downgrade your plan, the change will take effect at the end of your current billing cycle. You can continue using your current plan until that time, and the new plan will be applied after the billing period ends.What happens when I upgrade a plan?If you're currently on a paid plan and wish to upgrade to a higher plan, the unused amount from your current plan will be deducted from the cost of the new plan. Additionally, GST will be applied to the final amount.For example, if you have a current plan costing $100 and you've used $40 of it, you have $60 remaining. If the new plan costs $150, your effective cost will be $150 - $60 = $90. GST will then be applied to the $90.What happens when my plan is over?If you're on auto-renewal, your plan will be renewed automatically if the payment is successful. If the payment fails, a grace period will begin, giving you extra time to make the payment.How can I buy a add-on on my current plan?If you're subscribed to a yearly plan, you have the option to buy either a monthly or yearly add-on. However, if you choose a monthly add-on, it will only remain active for the rest of the current month. To keep using the add-on in the following month, you’ll need to purchase it again when the new month starts.How can I get my invoice over the mail??To get your invoice over email, go to the Invoice section in the Subscription panel. Click on the mail icon in the action button, and the invoice will be sent directly to your email.How the billing works in Grace period?If you renew your plan during the grace period, the days in the grace period will be added to your next billing cycle, so you won’t lose any time.How many days are in Grace period?Partners have a 15-day grace period. You can renew your plan within this period to continue using services without any interruptions.What is grace period?The grace period is an extra set of days we provide after your current billing plan ends to ensure your services aren’t interrupted. During this time, you can renew your plan without any disruption.What if my grace period ends?If your grace period ends without renewing your plan, your account will be frozen, and you will no longer have access to BotPenguin services.What if I renew my plan while Grace period?If you renew your plan after the grace period, you will be charged for the grace period based on a percentage of your previous plan’s cost, along with the full cost of the new plan you’re purchasing.How does auto-renewal of plan works?In auto-renewal mode, you’ll receive a reminder before your plan ends. This ensures you have sufficient funds on your credit card to cover the cost of the plan and continue your services without interruption. If you have sufficient funds on your credit card, the amount will be automatically deducted, and your plan will be renewedWhat happens if the payment is failed in case of auto renewal?If the payment for auto-renewal fails, you will enter a grace period. During this time, you have the opportunity to renew your plan and avoid service disruption.What if I consume all the messages before the plan is over?If you use up your resources before your plan expires, you can purchase add-on packs for extra messages or services as needed.Can I buy a monthly add-on if I m currently on a annual plan?Yes, you can buy a monthly add-on if you are currently on a annual plan.What happens if my account gets frozen?If your account gets frozen, all your services will be disrupted, and your bots will stop functioning until your plan is renewed.What if i want to remove the Add-on from my next plan before renewal?If you want to remove an add-on before renewing your plan, you’ll need to manually remove it from your account. If you don’t remove it and renew the plan directly, you’ll be charged for both the add-on and the new plan.Is there any add-on for additional payment gateway?If you need an additional payment gateway, it can be developed upon request as a custom feature. The charges for this development will vary based on several factors, that can be discussed with the BotPenguin team.

Is this deal really for a lifetime? The term "lifetime" refers to a period of 5 years from the date of purchase. After this period, the benefits of the current deal will expire.Can I renew this deal at the same price and with the same offerings after 5 years? No, this is a one-time offer with special pricing and terms that are not available upon renewal. After 5 years, you will need to switch to our regular Whitelabel plan, and pricing will be based on the rates at that time. How many slots are available for this deal? There are only 10 slots available for this exclusive deal. Once they are filled, the offer will no longer be available. What happens if I miss the 2-hour window to purchase this deal? Due to the exclusive nature of this offer, if you miss the 2-hour window, you will not be able to access this deal. We encourage interested partners to act quickly to secure their spot. What additional benefits are included in this deal? Along with a significant discount, this deal includes additional messages for consumption, allowing you to serve your clients more effectively under your own branding. Is there a refund policy for this lifetime deal? Due to the exclusive and limited nature of this offer, we are unable to provide refunds once a purchase has been made. We encourage partners to review the terms carefully and make an informed decision. Can I transfer my deal to another company if I choose to sell my business?This deal is non-transferable. It is tied to the partner who originally purchases it and cannot be transferred to another business or individual. How will this deal impact my current services and pricing with BotPenguin?This deal will not affect your current services and pricing. It is an additional offer that enhances your capabilities and offers at a discounted rate, independent of your existing arrangements with BotPenguin. Can I upgrade or downgrade my subscription under the Lifetime Deal?Upgrades and downgrades are not possible under the Lifetime Deal. If you need to change your subscription level, you will need to subscribe to our regular Whitelabel plan at the current prices and terms available at that time. Are add-ons available with the Lifetime Deal subscription? Yes, add-ons are available with the Lifetime Deal. You can purchase additional features or capabilities at the original add-on rate specified in our regular plans. This allows you to customize and expand your services according to your business needs.What kind of support will I receive with the Lifetime Deal? With the Lifetime Deal, you will receive comprehensive support including onboarding, training, and standard support to ensure you are fully equipped to use our solutions effectively. Our team is committed to helping you succeed and will be available to assist with any questions or issues you may encounter If I need more features than what the Lifetime Deal offers, what are my options? If you find that you need more features or capabilities beyond what the Lifetime Deal offers, you have the option to purchase additional add-ons at the original rate or consider our regular plans which may offer a wider range of features and flexibility. Is there a limit to how many add-ons I can purchase under the Lifetime Deal?No, there is no limit to how many add-ons you can purchase under the Lifetime Deal. You can continue to expand your services by adding as many add-ons as necessary, subject to the original add-on rates.

Base URLUse the following base URL for each API that you want to useCopyhttps://api.v7.botpenguin.com/Access token & API keysBotPenguin provides different types of access tokens and API keys for various levels of access and functionality. This documentation explains the three types of tokens and API keys available:1. Agency Token:Usage: The agency token should be used for all agency-level APIs. This token provides access to features and functions at the agency level.How to Obtain: To obtain the agency token, follow these steps:Access the "My Account" section or Agency panel in BotPenguin.Look for the agency token, and you can copy it for use in your agency-level APIs.2. Customer Token:Usage: The customer token should be used for all customer-level APIs. This token is designed for access to features and functions at the customer level.How to Obtain: To obtain the customer token, follow these steps:Access the "Developer" section or customer panel in BotPenguin.Look for the customer token, and you can copy it for use in your customer-level APIs.3. WhatsApp API Key:Usage: The WhatsApp API key is specific to certain WhatsApp-related APIs and functionalities.How to Obtain: To obtain the WhatsApp API key, follow these steps:Navigate to the "API Key" tab under "Whatsapp Bot Settings" in the Bot section of BotPenguin.Locate and copy the WhatsApp API key for use with WhatsApp-related APIs.These access tokens and API keys are essential for authenticating and authorizing API requests and interactions within the BotPenguin platform. Please make sure to use the appropriate token or key based on your access level and the specific APIs you intend to access. Keeping your tokens and keys secure is crucial to maintaining the integrity of your BotPenguin account and data. Got any questions?If you have any questions, you can look into our repository of FAQs, most likely, you will find your answer here, If now, write us at contact@botpenguin.com

Get Customer DetailsThis API endpoint retrieves details of customers for a particular BotPenguin Partner Agency.EndpointMethodURLGEThttps://api.v7.botpenguin.com/customer/listParametersParameterRequiredDescriptionpageNoThe page number for pagination. Default is 1.sortNoSorting criteria. Default is createdAtHeadersHeaderValueDescriptionauthtypeKeyMust be set to ’Key’.AuthorizationBearer**Bearer token for authentication. You can get the same from the agency admin’s account on BotPenguin Dashboard.Example RequestCopycurl --location
’https://api.v7.botpenguin.com/customer/list?page=1&sort=createdAt’ \
--header ’authtype: Key’ \
--header ’Authorization: Bearer **********’Success API ResponseCopy{

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        },
    ],
    "code": 200
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}Response FieldsFieldDescriptionsuccessIndicates if the request was successful.messageAdditional information or error messages.dataArray of customer details._idUnique identifier of the customer. This will be used to retrieve customer tokennameName of the customer.contact.emailEmail address of the customer.verifiedIndicates whether the customer is verified.statusStatus of the customer (ACTIVE, INACTIVE, etc).subscriptionTypeType of subscription (e.g., v2).createdAtDate and time when the customer was created.updatedAtDate and time when the customer was last updated.lastLoginDate and time of the customer’s last login. Got any questions?If you have any questions, you can look into our repository of FAQs, most likely, you will find your answer here, If not, write us at contact@botpenguin.com

This API endpoint allows you to create a new customer. Customers can be created with various attributes, including their username, name, password, and limit.Endpoint URL: https://api.v7.botpenguin.com/customerHTTP Method: POSTRequest HeadersAuthorization: A bearer token is required for authentication. Replace [MASKED_TOKEN] with your valid API token. This token is used to authenticate and authorize the request.Content-Type: Set to application/json to indicate that the request body is in JSON format.Request BodyThe request body should be a JSON object containing the following attributes:username (string, required): The email address of the customer.name (string, required): The name of the customer.password (string, required): The password for the customer’s account.Sample RequestCopycurl ’https://api.v7.botpenguin.com/customer/create’ \

```
  -H ’Authorization: Bearer [MASKED_TOKEN]’ \
  -H ’Content-Type: application/json’ \
  --data-raw ’{"username":"[MASKED_EMAIL]","name":"Test Customer 1","password":"[MASKED_PASSWORD]","limit":2000}’ \
  --compressed
```

ResponseThe API will respond with the created customer information or an error message if the request fails.   Got any questions?If you have any questions, you can look into our repository of FAQs, most likely, you will find your answer here, If not, write us at contact@botpenguin.com

This API endpoint allows you to update customer information by providing the customer’s unique identifier.Endpoint URL: https://api.v7.botpenguin.com/customer/{customer_id}HTTP Method: PUTPath Parameterscustomer_id (string, required): The unique identifier of the customer to be updated.Request HeadersAuthorization: A bearer token is required for authentication. Replace [MASKED_TOKEN] with your valid API token. This token is used to authenticate and authorize the request.Content-Type: Set to application/json to indicate that the request body is in JSON format.Request BodyThe request body should be a JSON object containing the updated customer information. Ensure that you provide the necessary fields to update.Sample Request:Copycurl ’https://api.v7.botpenguin.com/customer/{customer_id}’ \

```
  -X ’PUT’ \
  -H ’Authorization: Bearer [MASKED_TOKEN]’ \
  -H ’Content-Type: application/json’ \
  --data-raw ’{[MASKED_DATA]}’ \
  --compressed
```

Replace {customer_id} with the unique identifier of the customer you want to update, [MASKED_TOKEN] with your valid API token, and [MASKED_DATA] with the updated customer information. Please note that sensitive data such as API tokens and customer details should be kept confidential.ResponseThe API will respond with the updated customer information or an error message if the request fails. Please refer to the API documentation for response details. Got any questions?If you have any questions, you can look into our repository of FAQs, most likely, you will find your answer here, If not, write us at contact@botpenguin.com

Delete CustomerThis API endpoint allows you to delete a customer’s account based on their unique identifier.Endpoint URL: https://api.v7.botpenguin.com/customer/{customer_id}Replace {customer_id} with the unique identifier of the customer you want to delete.HTTP Method: DELETERequest HeadersAuthorization: A bearer token is required for authentication. Replace [MASKED_TOKEN] with your valid API token. This token is used to authenticate and authorize the request.Sample RequestCopycurl ’https://api.v7.botpenguin.com/customer/{{customer_id}}’ \

```
  -X ’DELETE’ \
  -H ’Authorization: Bearer [MASKED_TOKEN]’ \
  --compressed
```

Replace [MASKED_TOKEN] with your valid API token. Please note that sensitive data such as API tokens should be kept confidential.ResponseThe API will respond with a JSON object indicating the success of the delete operation. Here is a sample response:Copy{"success":true,"message":"","code":200}Please replace [MASKED_TOKEN] in the request with your actual API token and [MASKED_CUSTOMER_ID] in the URL with the actual unique identifier of the customer for actual usage. Got any questions?If you have any questions, you can look into our repository of FAQs, most likely, you will find your answer here, If not, write us at contact@botpenguin.com

Get User API Access TokenThis API endpoint retrieves a user API Access token based on the provided user ID.EndpointMethodURLGEThttps://api.v7.botpenguin.com/ext/get-user-tokenParametersParameterRequiredDescriptionuserIdYesThe unique identifier for the user. You can get the same from the Get Customer API. HeadersHeaderValueDescriptionauthtypeKeyMust be set to ’Key’.AuthorizationBearerBearer token for authentication. You can get the same from the agency admin’s account on BotPenguin Dashboard.Example RequestCopycurl --location
’https://api.v7.botpenguin.com/ext/get-user-token?userId=*********’ \
--header ’authtype: Key’ \
--header ’Authorization: Bearer **********’Success API ResponseCopy{

    "success": true,
    "message": "",
    "data": {
        "permanentToken": {
            "key": "**********",
            "active": true
        }
    },
    "code": 200
}Response FieldsFieldDescriptionsuccessIndicates if the request was successful.messageAdditional information or error messages.dataContainer for the response data.permanentTokenObject containing the permanent API access token details of the customerkeyAPI access token generated for the user.activeIndicates whether the token is currently active or not.codeThe status code indicating the result of the request (200 for success). Got any questions?If you have any questions, you can look into our repository of FAQs, most likely, you will find your answer here, If not, write us at contact@botpenguin.com.

DescriptionThis endpoint retrieves custom user (Team member) data with optional pagination and search functionality for any particular customer’s account.Request URLCopyhttps://api.v7.botpenguin.com/custom-userRequest MethodCopyGETRequest HeadersHeaderValueAuthorizationBearer [Your Access Token]authtypeKeyRequest ParametersParameterDescriptionTypeRequiredpagePage number for paginationintegerNoispaginationFlag to indicate paginationbooleanNosearchTextText to search users by name or contact infostringNoSample RequestCopycurl --location
’https://api.v7.botpenguin.com/custom-user?page=1&ispagination=true&searchText=’ \
--header ’Authorization: Bearer [Your Access Token]’ \
--header ’authtype: Key’Sample ResponseCopy{

    "success": true,
    "message": "",
    "data": [
        {
            "_id": "*****************",
            "whitelabel": false,
            "name": "Dummy Name",
            "contact": {
                "phone": {
                    "number": "9876543211",
                    "prefix": "91"
                },
                "_id": "***********************",

"email": "dummyemail@relinns.com"
},
"picture": "https://cdn.botpenguin.com/assets/avatars/sample.svg",
"liveAvailability": "ONLINE",
"leadsVisibility": "ASSIGNED",
"status": "ACTIVE",
"description": "",
"type": "CUSTOMER",
"unreadMessages": 47,
"_role": "************************",
"_parent": "************************",
"createdAt": "2024-04-26T17:10:22.134Z",
"updatedAt": "2024-05-14T05:37:24.820Z",
"__v": 0
}
],
"code": 200
}Response AttributesAttributeDescriptionsuccessIndicates if the request was successful.messageAdditional information or error message.dataArray of custom user (Team member) objects.codeHTTP status code of the response.Data AttributesAttributeDescription_idUnique identifier for the custom user.whitelabelFlag indicating if the user belongs to a whitelabel.nameName of the user.contactContact information of the user.pictureURL of the user’s profile picture.liveAvailabilityAvailability status of the user (e.g., ONLINE).leadsVisibilityVisibility of leads for the user (e.g., ASSIGNED).statusStatus of the user (e.g., ACTIVE).descriptionDescription or additional information about the user.typeType of user (e.g., CUSTOMER).unreadMessagesNumber of unread messages for the user._roleIdentifier for the user’s role._parentIdentifier for the user’s agency.createdAtDate and time when the user was created.updatedAtDate and time when the user was last updated.__vVersion number of the user object.Note:Make sure to replace [Your Access Token] with your actual access token.Mask confidential details such as access tokens before sharing or storing this documentation.

This endpoint generates a permanent token for a specified user based on their email and user type.Request URLCopyhttps://api.v7.botpenguin.com/ext/get-user-tokenRequest MethodCopyGETRequest HeadersHeaderValueAuthorizationBearer [Your Access Token]authtypeKeyRequest ParametersParameterDescriptionTypeRequiredAllowed ValuesemailEmail address of the userstringYestypeType of userstringYesAGENT, CUSTOM_USER, CUSTOMERAllowed values for the Type query parameterAGENT: For team users with default agent role CUSTOM_USER: For team members with a custom role CUSTOMER: For the main customer roleSample RequestCopycurl --location ’https://api.v7.botpenguin.com/ext/get-user-token?email=[Team member’s Email]&type=CUSTOM_USER’ \
--header ’Authorization: Bearer [Your Access Token]’ \
--header ’authtype: Key’Sample ResponseCopy{
"success": true,
"message": "",
"data": {
"permanentToken": {
"key": "[Agent’s Token]",
"active": true
}
},
"code": 200
}Response AttributesAttributeDescriptionsuccessIndicates if the request was successful.messageAdditional information or error message.dataObject containing the permanent token.codeHTTP status code of the response.Data AttributesAttributeDescriptionpermanentTokenObject containing the permanent token details.keyThe generated permanent token key.activeFlag indicating if the token is active.Note:Make sure to replace [Your Access Token] with your actual access token.Mask

confidential details such as access tokens before sharing or storing this documentation.
Embedding the BotPenguin Inbox in 3rd Party AppsThis documentation provides instructions on how to embed the BotPenguin Inbox into any custom 3rd party application using an IFrame.PrerequisiteBefore embedding the BotPenguin Inbox, ensure the following prerequisites are met:Approval: Obtain approval from the BotPenguin team for the intended use case.Whitelisting: The parent URL under which the BotPenguin Inbox URL will be hosted must be whitelisted. Contact the BotPenguin support team to whitelist the Parent URL by sending an email with the details.Make sure you have a valid and ready-to-use Customer Account to test the integration.Implementation StepsFollow these steps to embed the BotPenguin Inbox into your custom application:The interface of authenticating and mapping BotPenguin and 3rd Party Application UsersCreate and Interface where customer can enter their API Token. Save that API token, It will be used in the subsequent calls. Customers can find their access token from the "Developers" section. Map the team members of the customer’s account using the following API Get Team Members (Custom Users) -Use this API to list down all the team members under one customer account.
Get Custom User (Team Member) Token - Use this API to get the team member’s token and save the same for future use.Once the mapping is done, Save the same and use the team member’s token in subsequent callsCreate Parent URL: Create a parent URL within your custom application where you plan to host the BotPenguin Inbox URL. Ensure that the BotPenguin team has confirmed the whitelisting of this URL.Create IFrame: Set up an IFrame within your application where you want to display the BotPenguin Inbox.Authenticate and Redirect User: Internally authenticate the user (Team member) and redirect them to the BotPenguin Inbox page. Use the following steps:Authenticate the user by passing the following URL:
Copyhttps://app.botpenguin.com/api-login?token=********
Replace ******** with the authentication token of the team member.
Upon successful authentication, internally redirect the user to the following URL:
Copyhttps://app.botpenguin.com/inbox-merged/chats?s=0
This URL will open the BotPenguin Inbox.By following these steps, you can seamlessly integrate the BotPenguin Inbox into your custom 3rd party application. If you encounter any issues or require assistance, please contact the BotPenguin support team. Got any questions?If you have any questions, you can look into our repository of FAQs, most likely, you will find your answer here, If not, write us at contact@botpenguin.com.