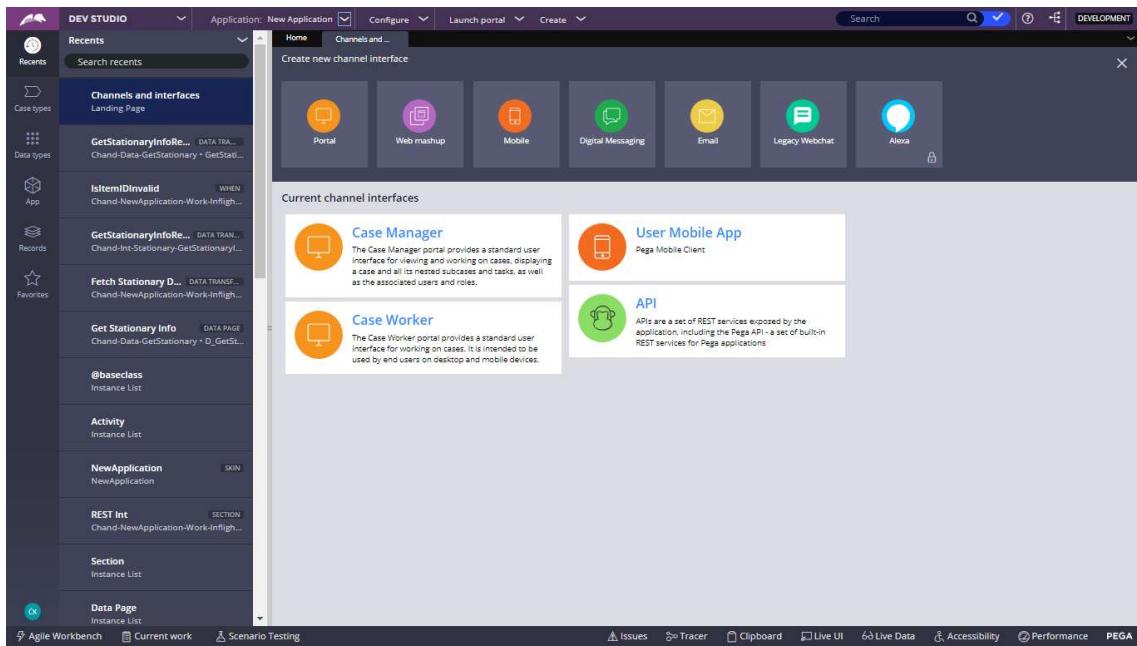
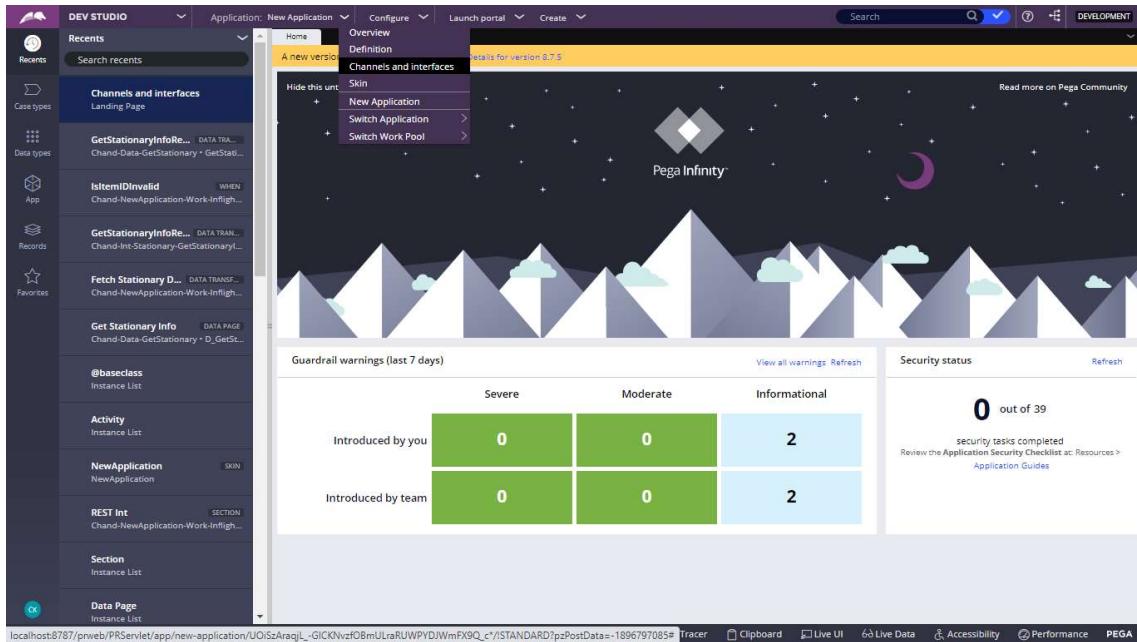


# How to create a Chatbot in Pega?

Open Dev Studio and go to Channels and Interfaces.

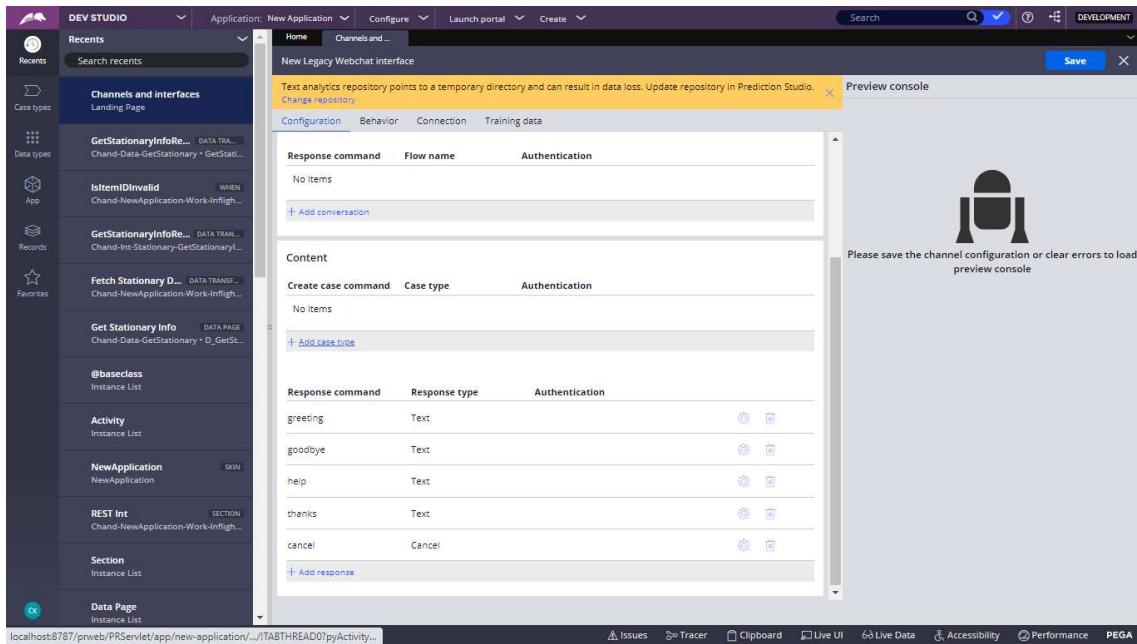


## Choose Legacy Webchat.

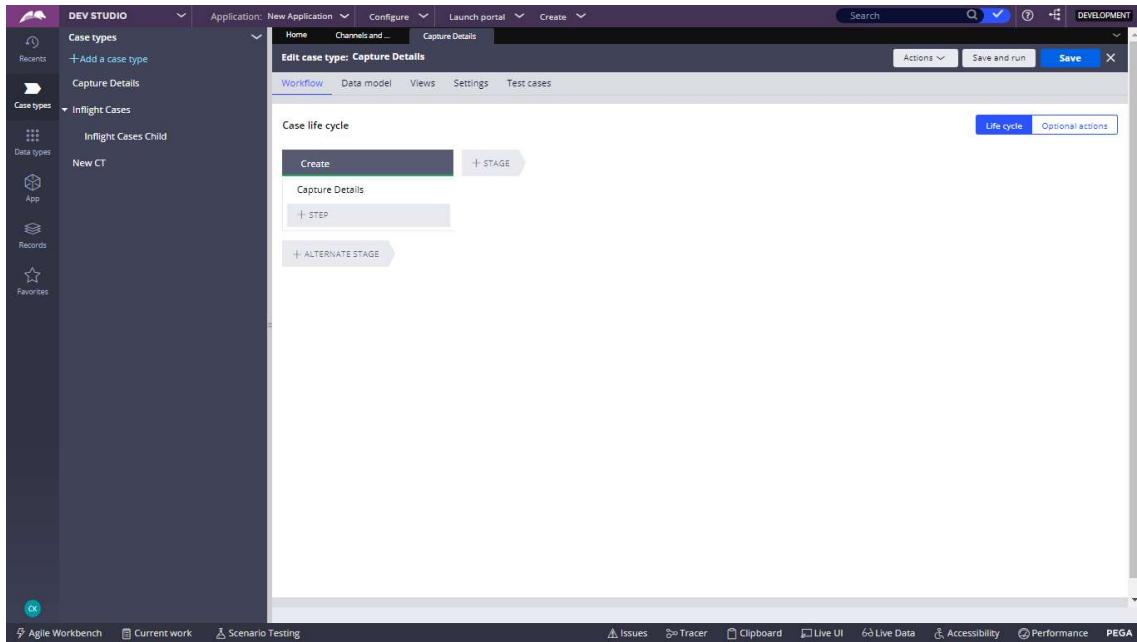
The screenshot shows the Pega DEV STUDIO interface with the 'Channels and interfaces' section open. A modal window titled 'Create new channel interface' is displayed, showing various channel options: Portal, Web mashup, Mobile, Digital Messaging, Email, Legacy Webchat, and Alexa. The 'Legacy Webchat' option is highlighted with a blue border. Below the modal, the 'Current channel interfaces' section lists 'User Mobile App' and 'Case Worker'.

The screenshot shows the Pega DEV STUDIO interface with the 'Channels and interfaces' section open. A modal window titled 'New Legacy Webchat interface' is displayed, showing configuration tabs for 'Configuration', 'Behavior', 'Connection', and 'Training data'. The 'Configuration' tab is active, showing the 'Details' section with a 'Channel interface name' field containing 'Capture Details'. Below it is a 'Conversation flows' section with a table for 'Response command', 'Flow name', and 'Authentication'. The 'Content' section includes 'Create case command', 'Case type', and 'Authentication' fields. At the bottom, there's a 'Response command', 'Response type', and 'Authentication' table with a single item 'greeting' under 'Response command' and 'Text' under 'Response type'. A message in the top right corner reads: 'Text analytics repository points to a temporary directory and can result in data loss. Update repository in Prediction Studio.' and 'Please save the channel configuration or clear errors to load preview console'.

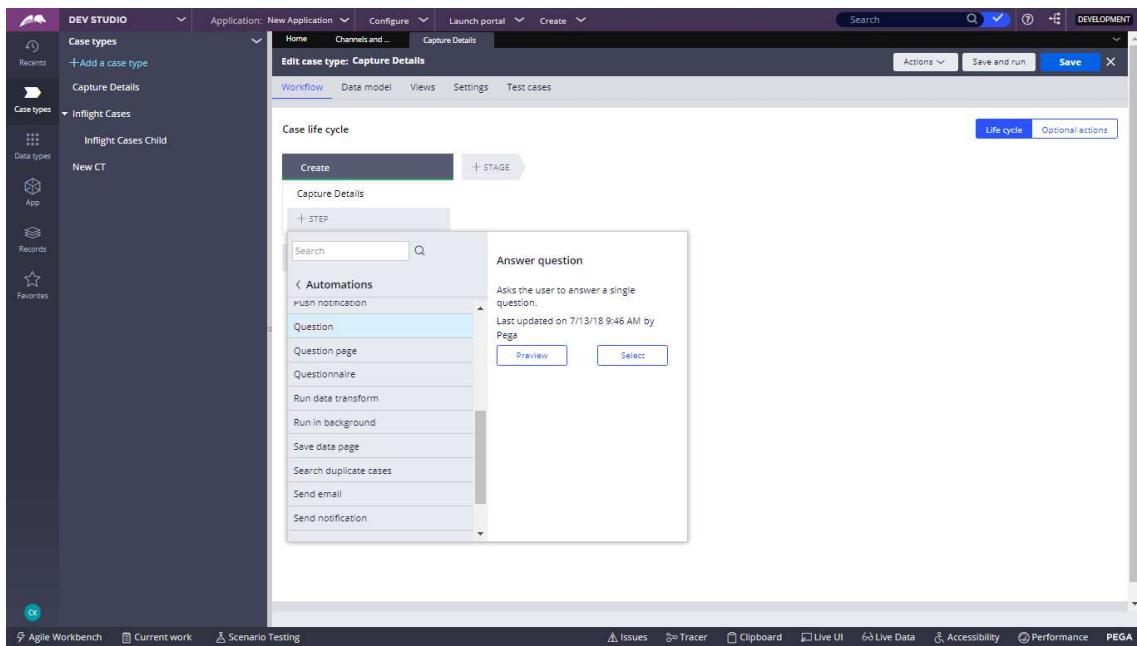
Click on Add case type.



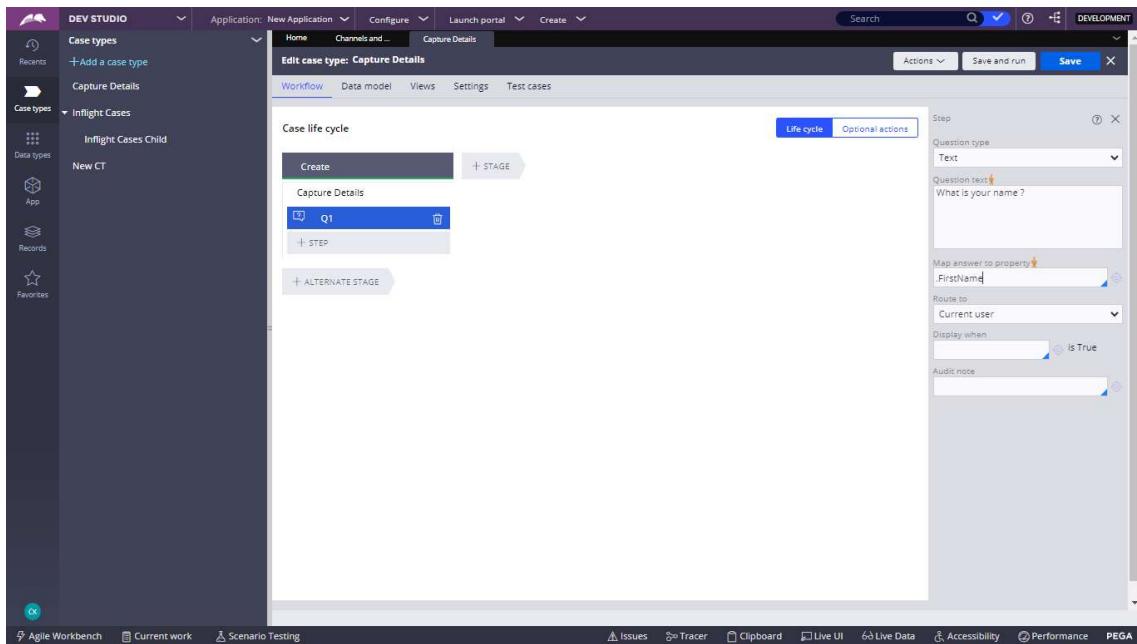
Create a new case type



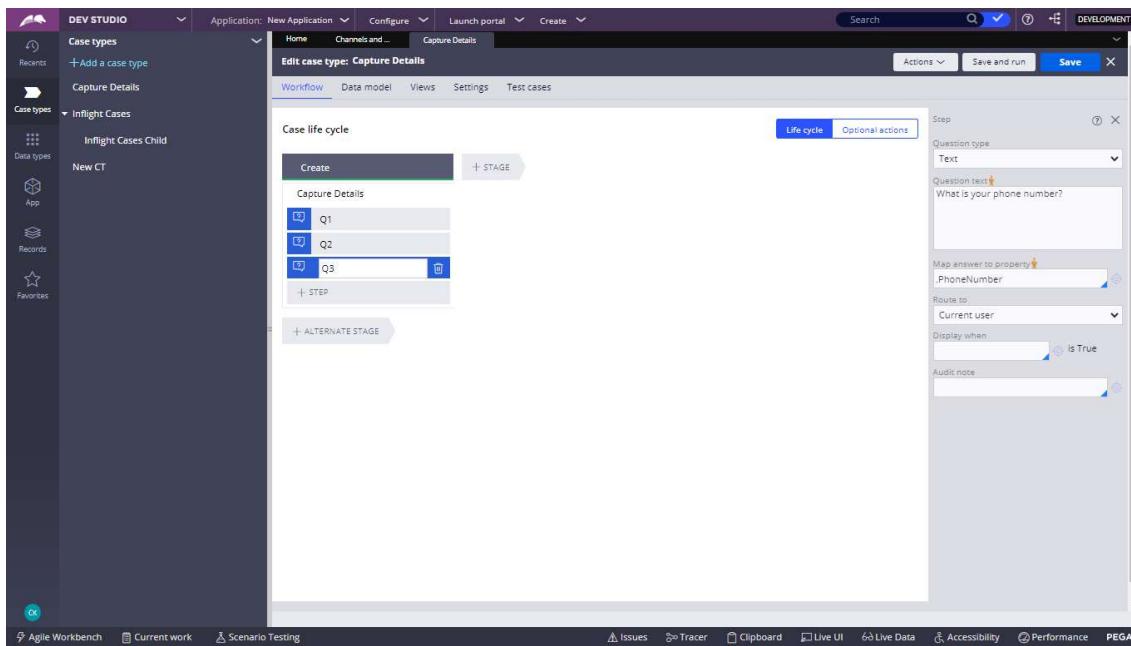
Select question automation.



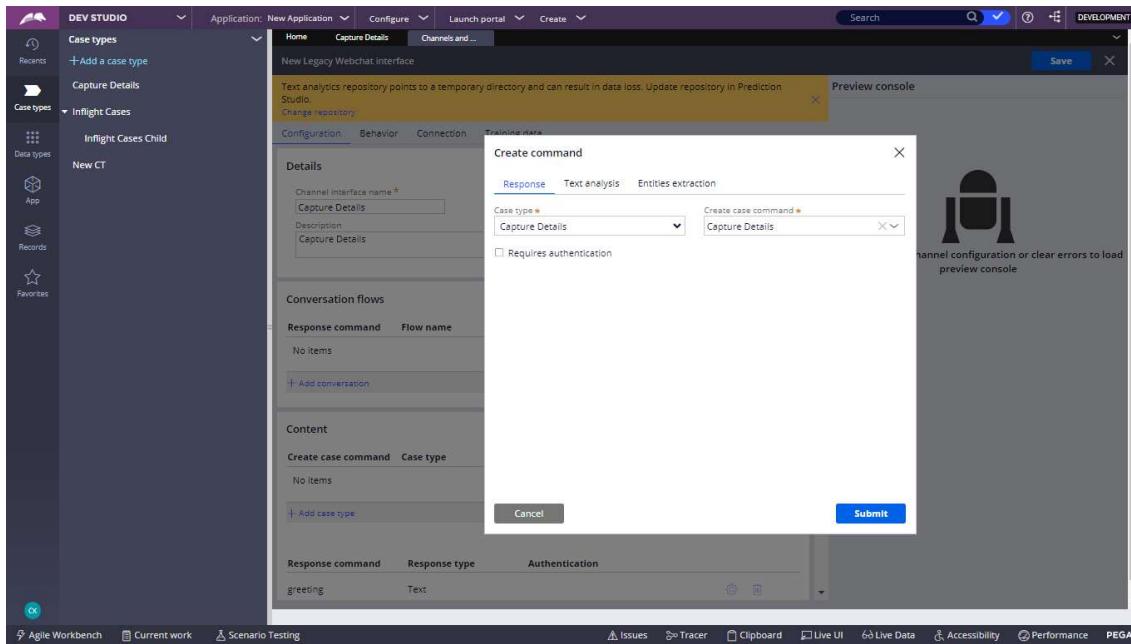
Write a question you want to ask and map to the property.



Create few questions and click on save.

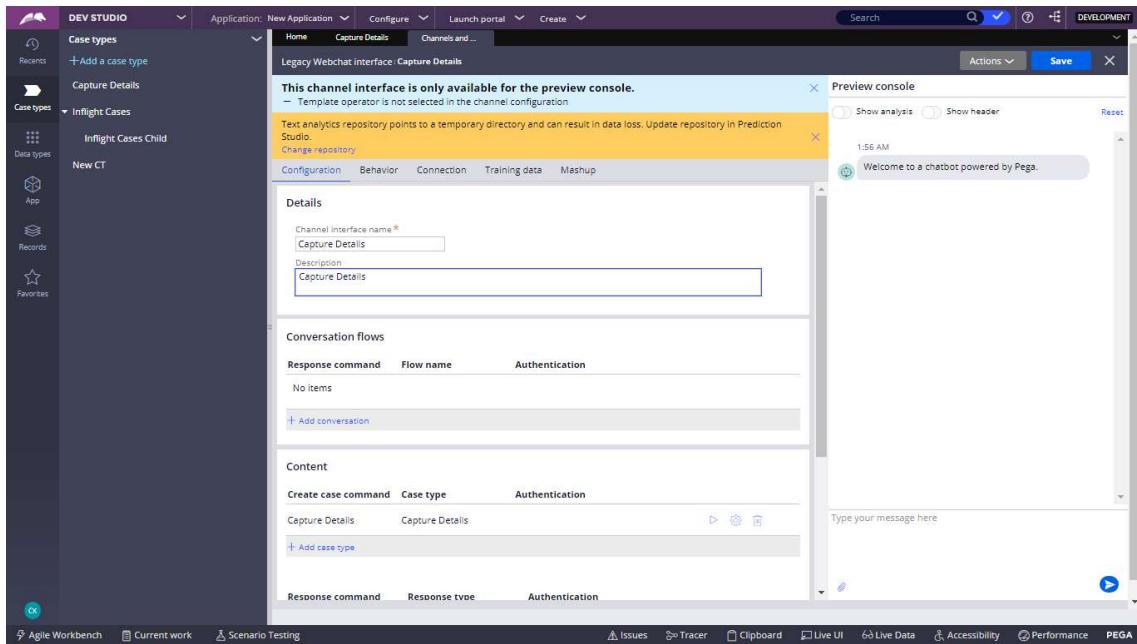


Now click on Add case type in channels and interfaces tab

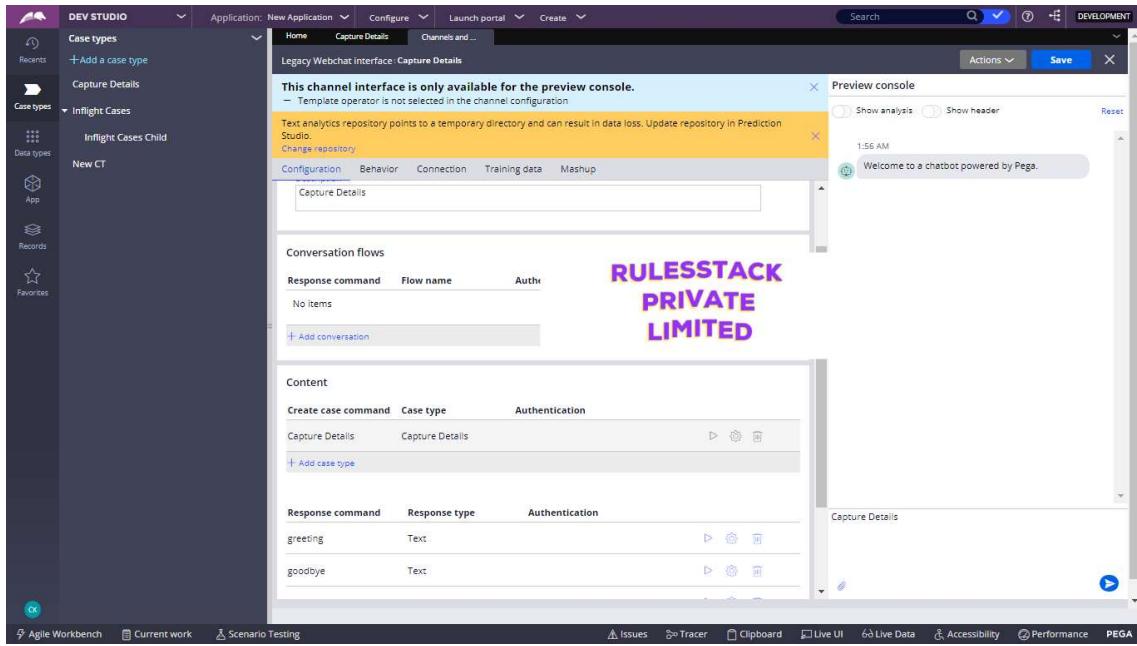


Submit. Click on save.

This is a Chatbot preview.

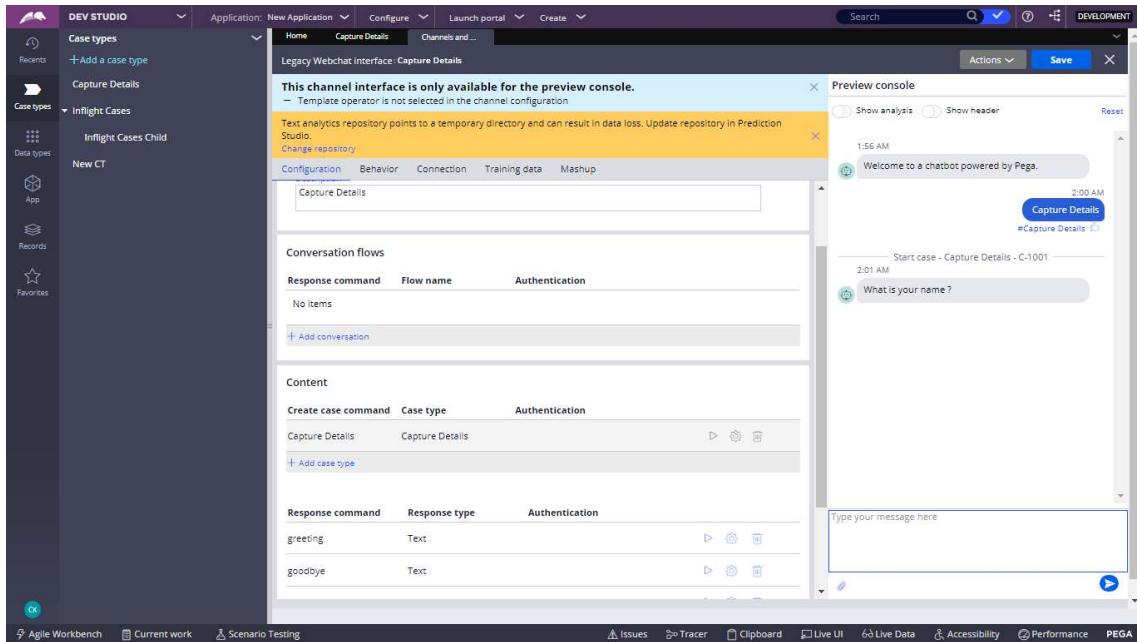


In the above screenshot we can see Create case command and under that we can see "Capture Details" as a command. Copy that command and paste it in the message and click on send button.

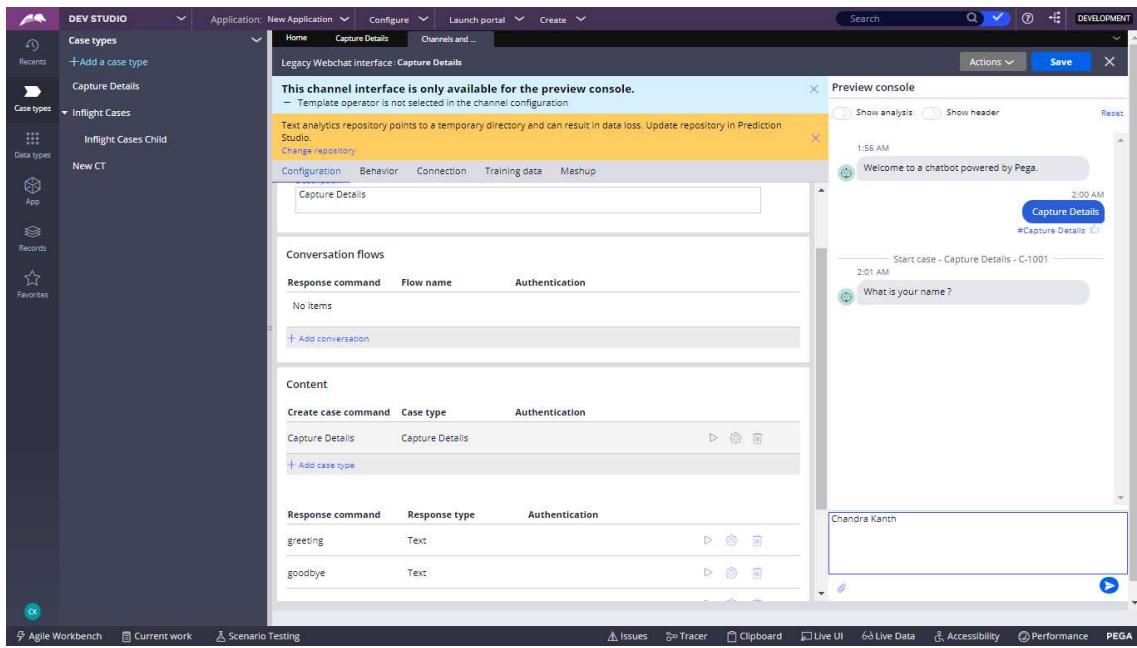


Now this will run the case in the background and creates a work object.

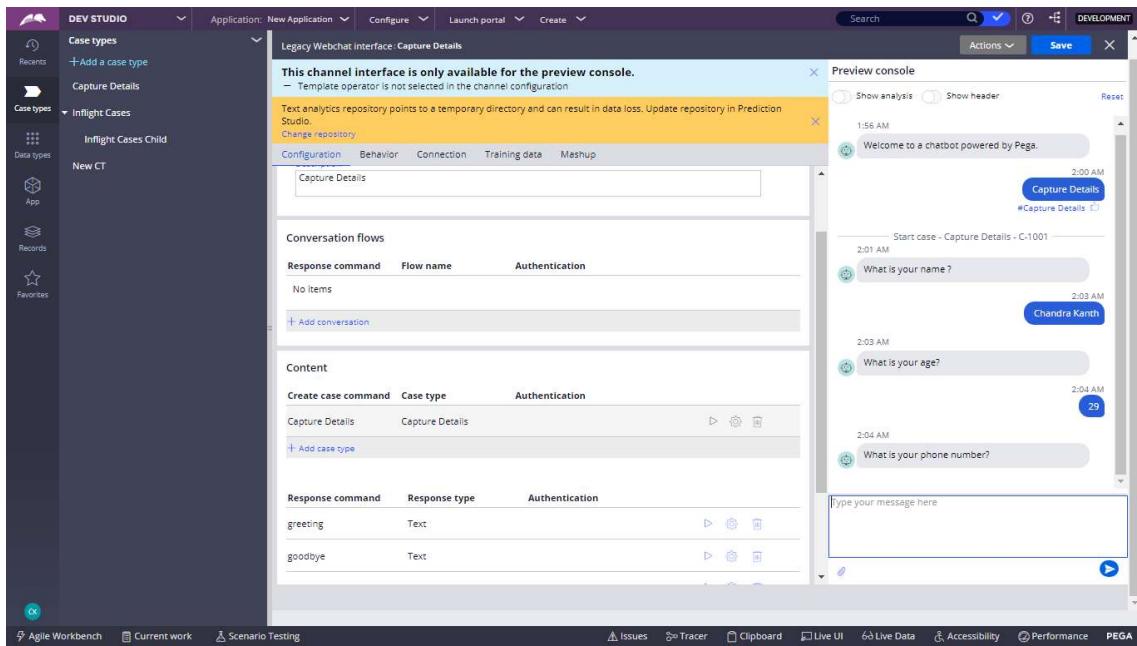
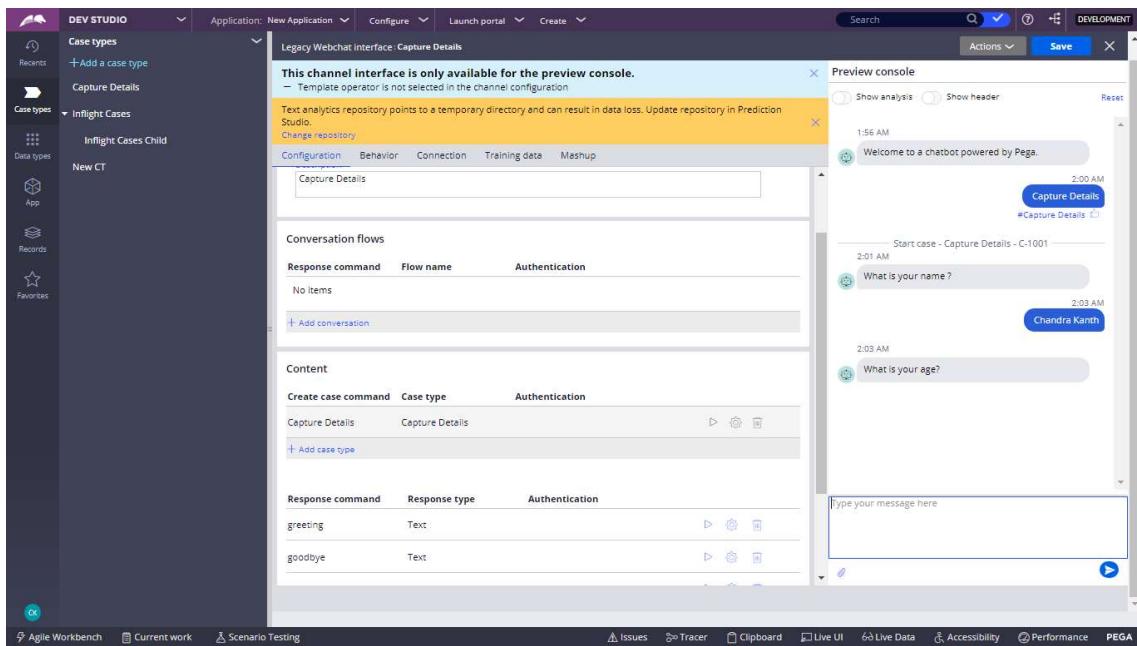
In the below screenshot we can see case C-1001 is created and it is prompting the first question which we have created.



I am entering my name and click on send button.



Here it comes with the second question. Entering the answer and clicking on send button.



This screenshot shows the Pega Dev Studio interface for configuring a Legacy Webchat interface. The left sidebar includes sections for Case types, Data types, and Favorites. The main area displays the 'Capture Details' configuration page for the 'Capture Details' case type. A yellow warning bar at the top states: 'This channel interface is only available for the preview console.' and 'Template operator is not selected in the channel configuration.' Below this, there are tabs for Configuration, Behavior, Connection, Training data, and Mashup. The Configuration tab is active, showing the 'Capture Details' section. The Behavior tab shows 'Conversation flows' with no items. The Connection tab shows 'Content' with 'Create case command', 'Case type', and 'Authentication' sections. The Authentication section lists 'Capture Details' and 'Capture Details'. The Training data and Mashup tabs are also present. To the right, a 'Preview console' window is open, showing a chat session between a user and a bot. The user asks 'What is your name?', 'What is your age?', and 'What is your phone number?'. The bot responds with 'Chandra Kanth', '29', and '9654616466'. The preview console also shows validation errors for the phone number input. The bottom of the screen shows the Pega navigation bar with links like Agile Workbench, Current work, Scenario Testing, Issues, Tracer, Clipboard, Live UI, Live Data, Accessibility, Performance, and PEGA.

This screenshot is identical to the one above, showing the Pega Dev Studio interface for configuring the Legacy Webchat interface. It displays the 'Capture Details' configuration page and the preview console window showing the same chat session and validation errors. The bottom navigation bar is also identical.

Now let's see if these details are captured in case type or not.

Opening the instance.

Details are successfully captured and saved in the case type.

The screenshot shows the Pega Clipboard Viewer interface. On the left, there's a tree view of clipboard items under 'Pega Clipboard HV12GJA7EILKNLF5KH7BVSP8T4BKZUNA'. One item is expanded, showing properties like 'D\_pzFeedParams' and 'D\_pzGetFollowedByUsers'. On the right, a table displays the captured data:

Property	Value
Age	29
FirstName	Chandra Kanth
HarnessType	
PhoneNumber	135438
Purpose	
pxApplication	NewApplication
pxApplicationVersion	01.01.01
pxCommitDateTime	20230821T060533.978 GMT
pxCoveredCount	0
pxCoveredCountOpen	0
pxCoveredCountUnsatisfied	0
pxCoversKey	
pxCreateDateTime	20230821T060110.578 GMT
pxCreateOperator	chandakanth_burna@rulesstack.com
pxCreateOpName	Chandra Kanth
pxCreateSystemID	pega
pxCumulativeQuestionScore	0
pxCurrentStage	PRIMO
pxCurrentStageLabel	Create
pxCurrentStageSubscript	PRIMO_1
pxExternalSystemUpdateCount	0
pxInName	C-1001
pxLockHandle	CHAND-NEWAPPLICATION-WORK C-1001
pxOpClass	Chand-NewApplication-Work-CaptureDetails
pxSaveDateTime	20230821T060533.973 GMT
pxSurveyScore	0
pxUpdateCounter	4

Also, we can customize the system responses

The screenshot shows the Pega Dev Studio interface. On the left, the navigation pane shows '2 applications' and 'Chand-NewApplication-Work' selected. In the center, the 'Capture Details' tab of the 'Legacy Webchat interface' is open. It displays a preview console with a conversation:

This channel interface is only available for the preview console.  
Template operator is not selected in the channel configuration.

Text analytics repository points to a temporary directory and can result in data loss. Update repository in Prediction Studio.  
Change repository

Configuration Behavior Connection Training data Mashup

System Responses

Response	Type
Welcome	Text
No match	Text
Multiple matches	Text
Internal Error	Text
Authentication	Authenticate
Authentication-Success	Text
Authentication-Fail	Text

Events

Command	Event type
No items	

Text Analyzer  Use advanced configuration  
  
 Enable model training

Preview console

Actions Save

What is your age?  
2:04 AM 29

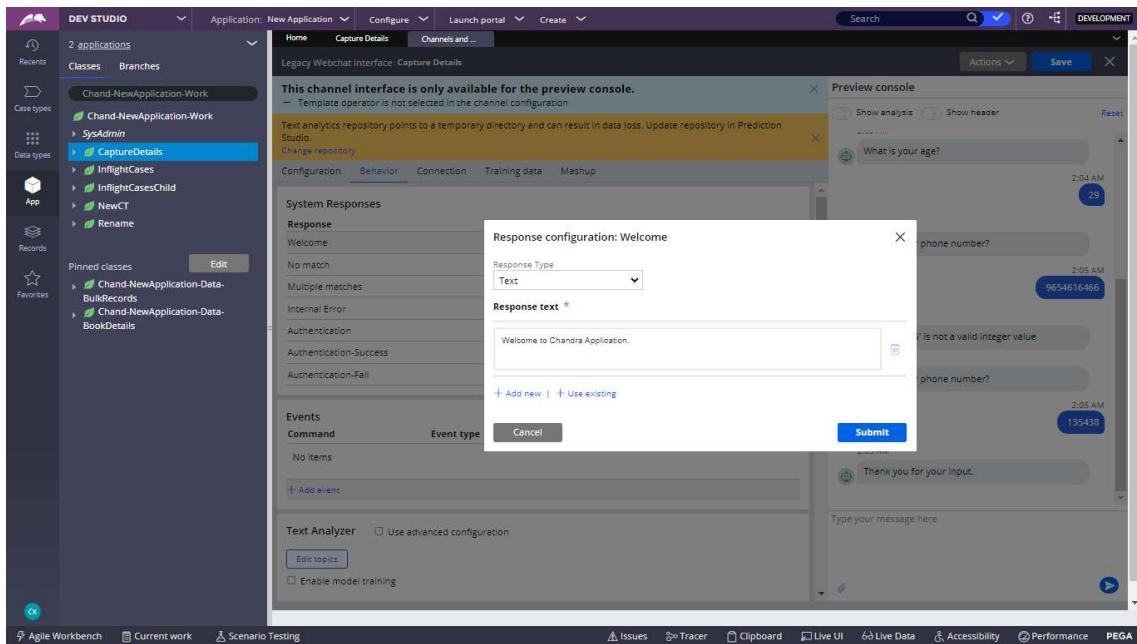
What is your phone number?  
2:05 AM 9654616466

'9654616466' is not a valid integer value  
2:05 AM

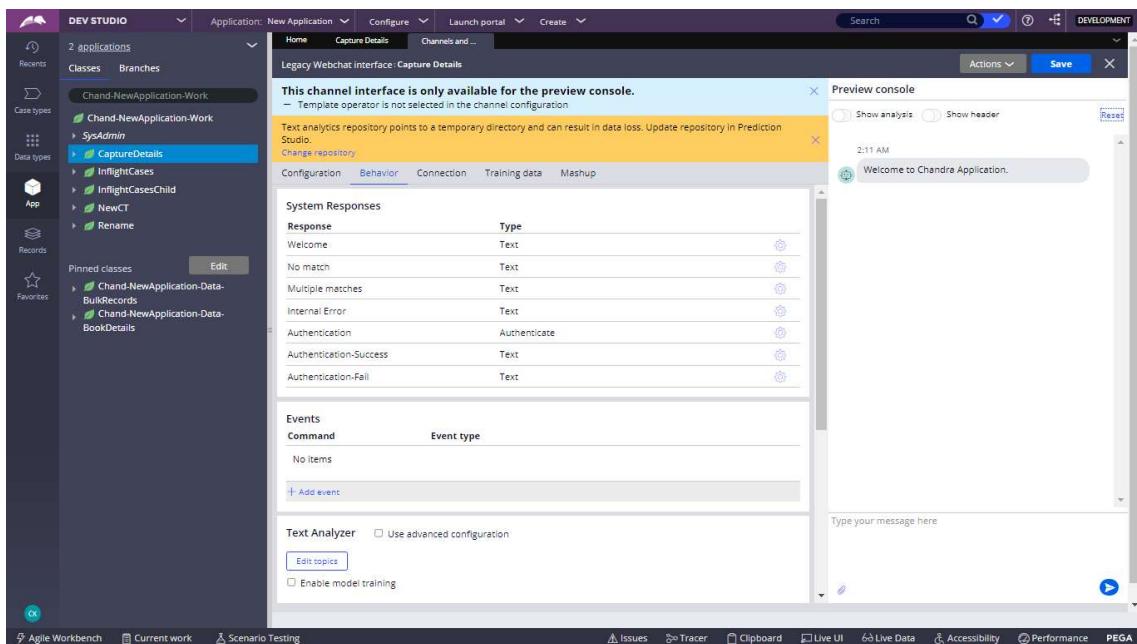
What is your phone number?  
2:05 AM 135438

Thank you for your input.  
2:05 AM

Type your message here

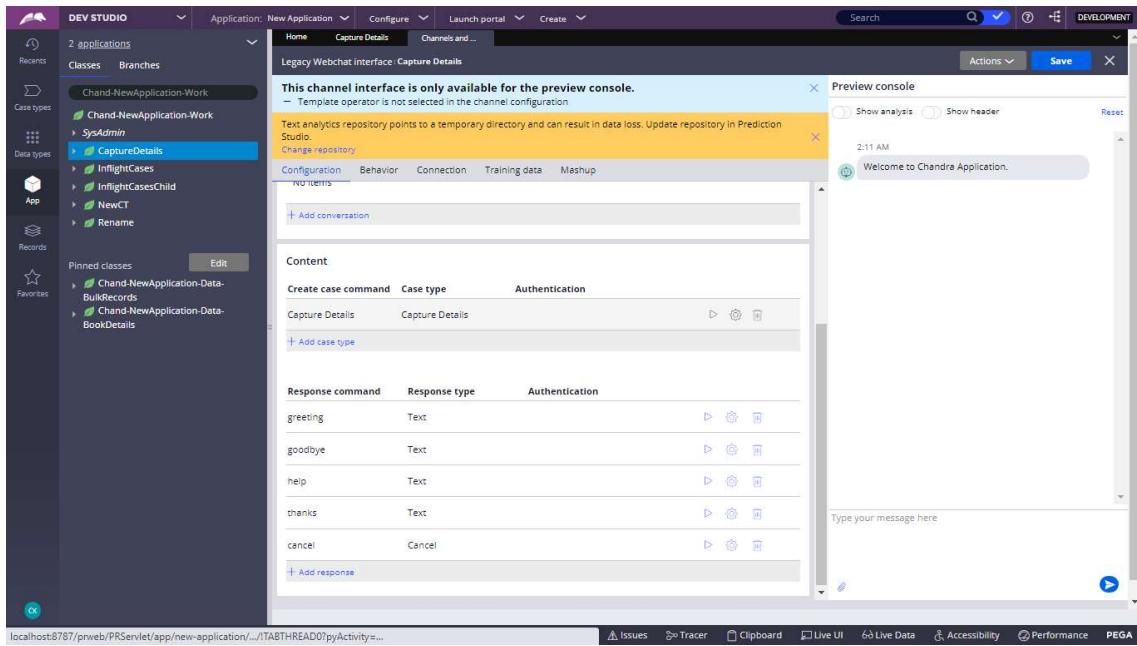


Click on reset.

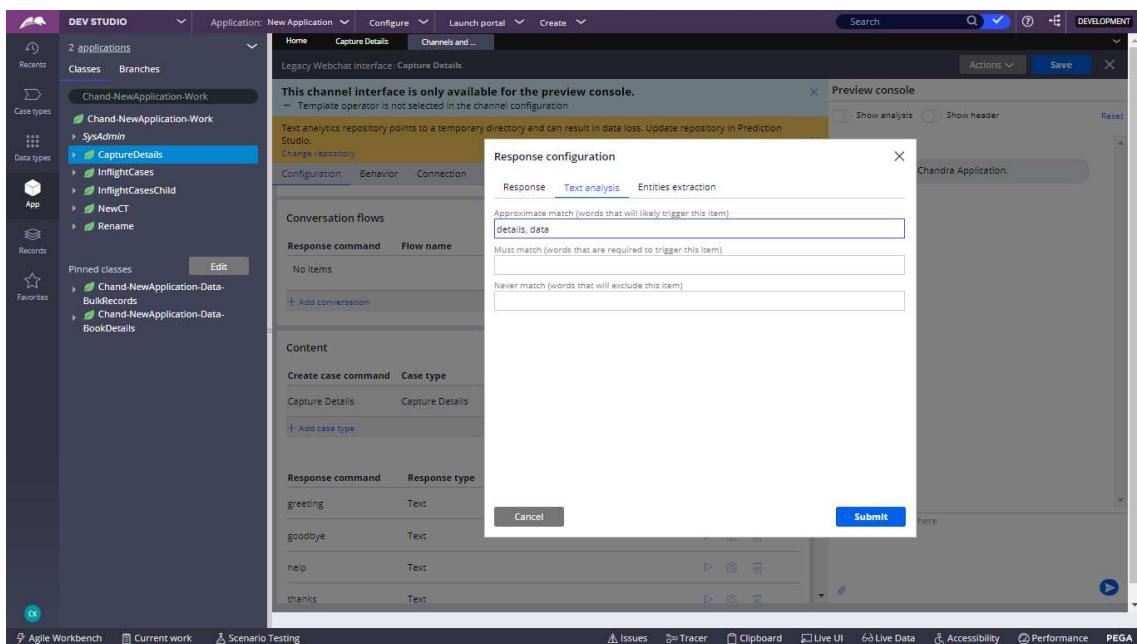


Also, we can provide other keywords for searching.

Click on gear icon.



Enter the text



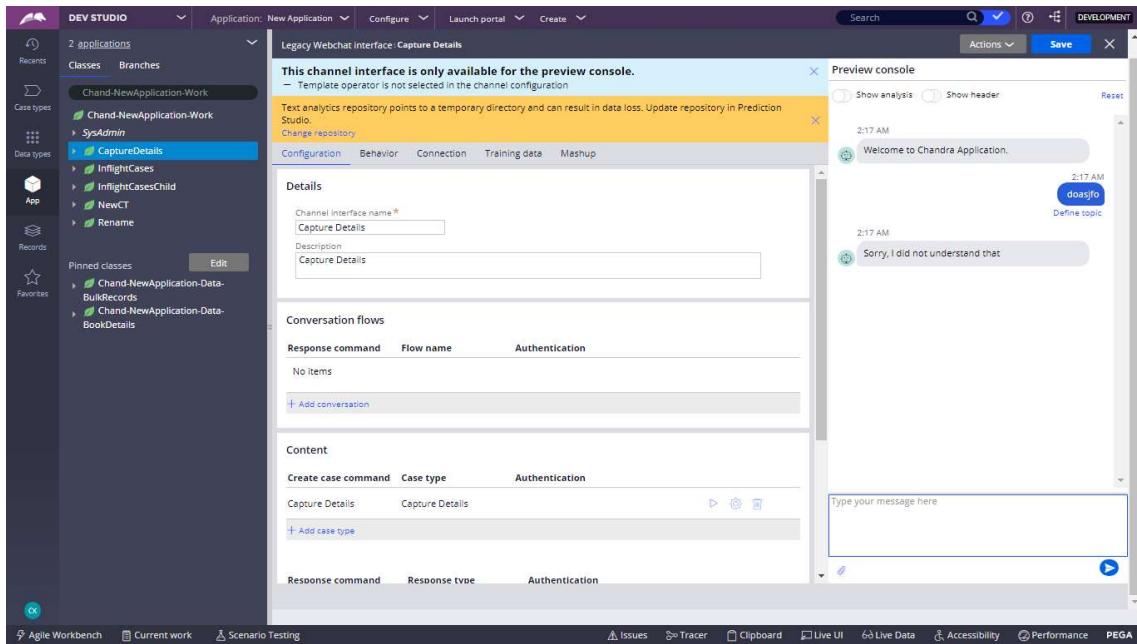
Submit and save.

Now entering the data and click on send.

This screenshot shows the Pega DEV STUDIO interface for configuring a 'Capture Details' channel. The left sidebar lists applications, classes, branches, and pinned classes. The main panel displays the 'Capture Details' configuration screen. At the top, a message states: 'This channel interface is only available for the preview console.' Below this, a warning about a temporary text analytics repository is shown. The configuration tabs include 'Configuration', 'Behavior', 'Connection', 'Training data', and 'Mashup'. The 'Details' section shows the channel interface name as 'Capture Details' and its description as 'Capture Details'. The 'Conversation flows' section is empty. The 'Content' section shows a 'Create case command' named 'Capture Details' with 'Case type' 'Capture Details' and 'Authentication' set. The 'Response command' section is also empty. On the right, a 'Preview console' window shows a welcome message: 'Welcome to Chandra Application.' A text input field contains the word 'data'. The bottom navigation bar includes links for Agile Workbench, Current work, Scenario Testing, Issues, Tracer, Clipboard, Live UI, Live Data, Accessibility, Performance, and PEGA.

This screenshot shows the same Pega DEV STUDIO interface as the previous one, but with a conversation history visible in the preview console. The history starts with a welcome message from the application. It then shows a message from the user '#Capture Details' at 2:16 AM, followed by a response from the system: 'Start case - Capture Details - C-1002' at 2:16 AM. The user then asks 'What is your name?' and the system has a placeholder message 'Type your message here' in the input field. The rest of the interface is identical to the first screenshot, including the channel configuration tabs and pinned classes.

If we enter the inconsistent data bot will not understand.

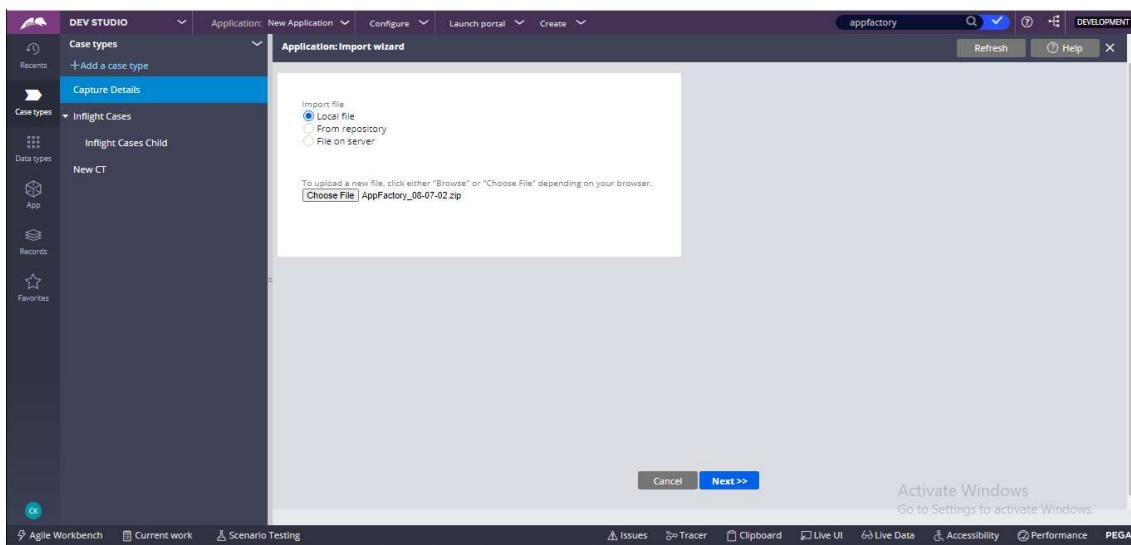
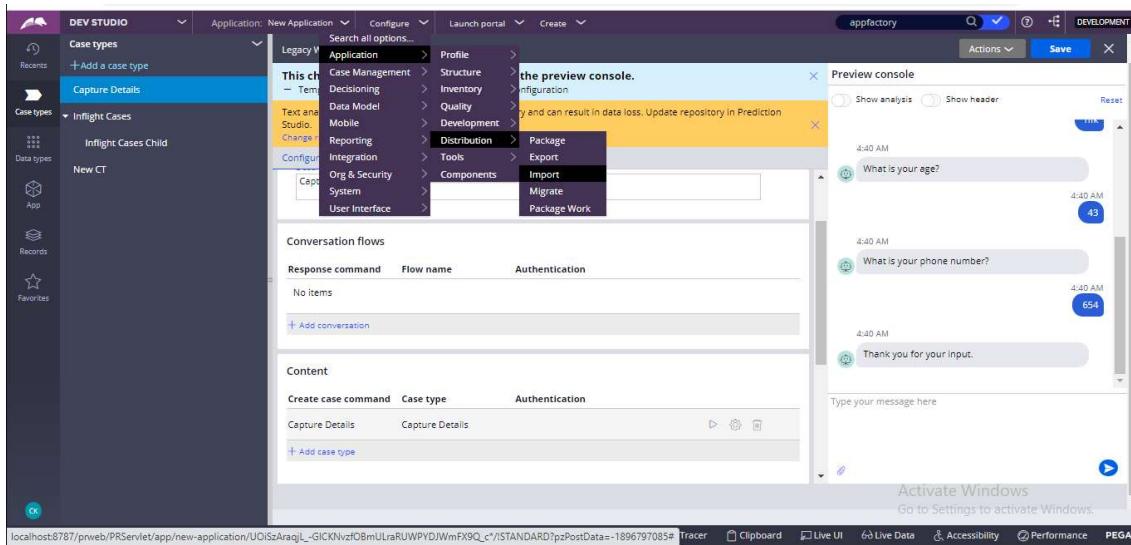


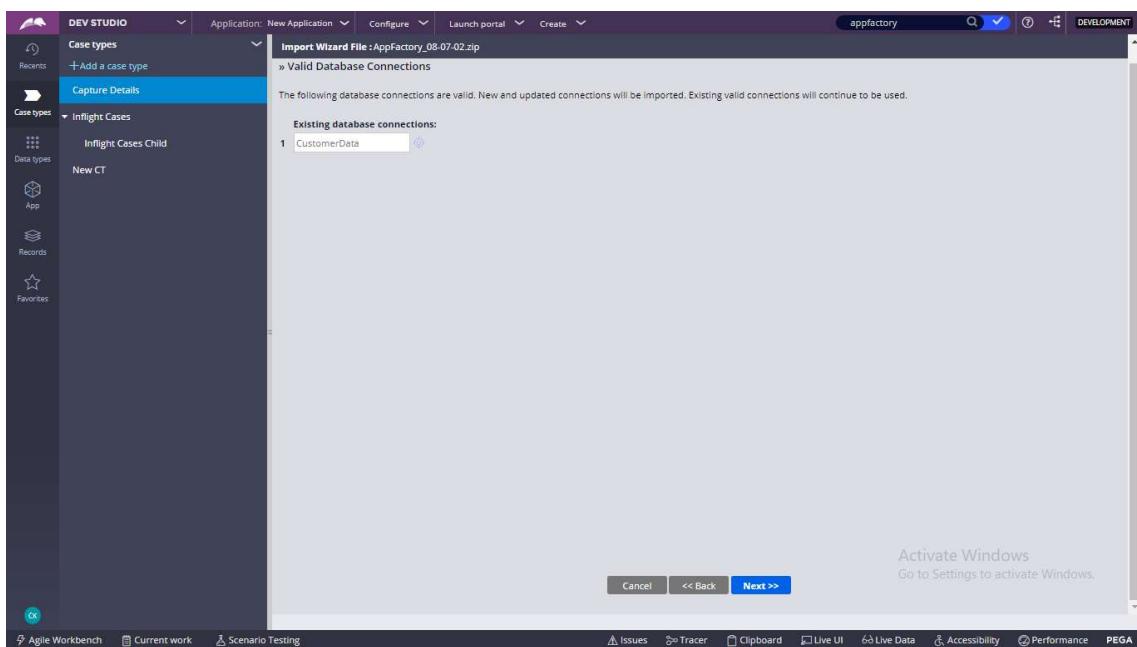
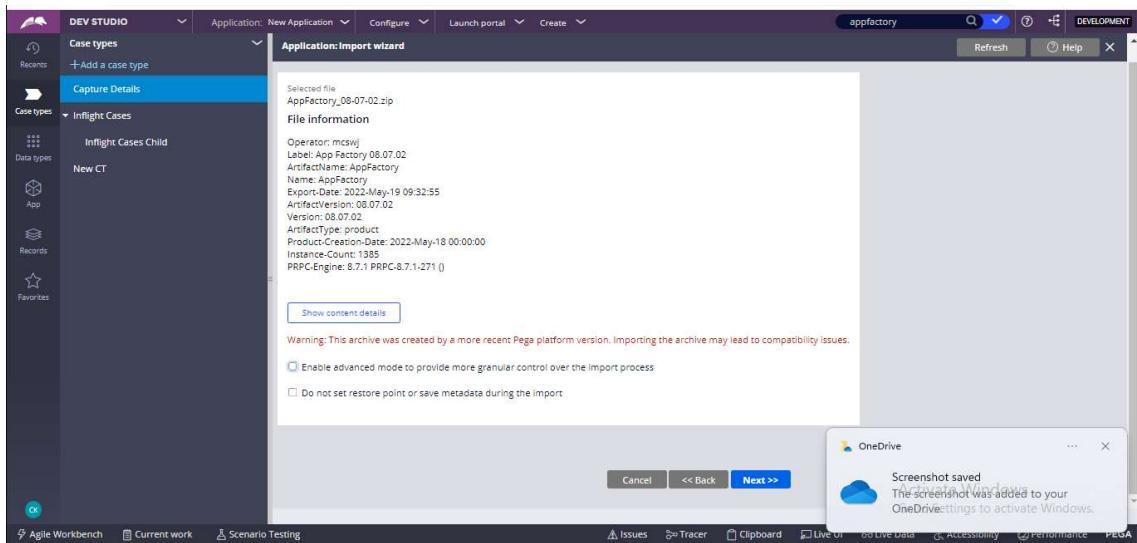
For creating a Chatbot download an App Factory zip file from the below link which suits for your Pega version.

<https://community.pega.com/marketplace/application/pega-app-factory>

Pega App Factory	Supported Releases	Documentation
<a href="#">App Factory 08.08.01</a>	Pega 8.8	<ul style="list-style-type: none"> <li><a href="#">Installation Guide</a></li> <li><a href="#">Upgrade Guide</a></li> </ul>
<a href="#">App Factory 08.07.02</a>	Pega 8.7	<ul style="list-style-type: none"> <li><a href="#">Installation Guide</a></li> <li><a href="#">Upgrade Guide</a></li> </ul>
<a href="#">App Factory 08.06.01</a>	Pega 8.6	<ul style="list-style-type: none"> <li><a href="#">Installation Guide</a></li> <li><a href="#">Upgrade Guide</a></li> </ul>
<a href="#">App Factory 08.05.01</a>	Pega 8.5	<ul style="list-style-type: none"> <li><a href="#">Installation Guide</a></li> <li><a href="#">Upgrade Guide</a></li> </ul>
<a href="#">App Factory 08.04.02</a>	Pega 8.4	<ul style="list-style-type: none"> <li><a href="#">Installation Guide</a></li> <li><a href="#">Upgrade Guide</a></li> </ul>
<a href="#">App Factory 01.01.02</a>	Pega 8.3	<ul style="list-style-type: none"> <li><a href="#">Installation Guide</a></li> </ul>

After downloading the zip file just import the zip file through import wizard.





DEV STUDIO Application: New Application Configure Launch portal Create appfactory DEVELOPMENT

To view SQL DDL double click on a table or view.

Inflight Cases Child

New CT

Capture Details

Case types

+ Add a case type

Data types

App

Records

Favorites

Class Table Has DB Schema Changes

pr\_data\_rating pr\_History\_Data\_AppFactory\_Con Yes

pr\_History\_Data\_AppFactory\_Config pr\_History\_Data\_AppFactory\_e9f02 Yes

pr\_History\_Data\_AppFactory\_Config\_Collab pr\_History\_Data\_AppFactory\_7f663 Yes

pr\_History\_Data\_AppFactory\_Config\_Delegate pr\_History\_Data\_AppFactory\_a244b Yes

pr\_History\_Data\_AppFactory\_Config\_Provision pr\_History\_Data\_AppFactory\_47872 Yes

pr\_History\_Data\_Rating pr\_History\_Data\_Rating Yes

pr\_History\_PegaXF\_AppFactory\_Data-ApplicationTemplates pr\_History\_PegaXF\_AppFac\_52660 Yes

pr\_History\_PegaXF\_AppFactory\_Data-DefaultSpaceURLPins pr\_History\_PegaXF\_AppFac\_c92c9 Yes

pr\_History\_PegaXF\_AppFactory\_Data-DeploymentPipelines pr\_History\_PegaXF\_AppFac\_e4adc Yes

pr\_History\_PegaXF\_AppFactory\_Data-Environments pr\_History\_PegaXF\_AppFac\_cf5df Yes

pr\_History\_PegaXF\_AppFactory\_Data-Tiers pr\_History\_PegaXF\_AppFac\_420f6 Yes

pr\_History\_PegaXF\_AppFactory\_Data-Usage pr\_History\_PegaXF\_AppFactory\_D\_Yes

pr\_History\_PegaXF\_AppFactory\_Work pr\_History\_PegaXF\_AppFactory\_W\_Yes

pr\_PegaVF\_AppFactory\_Data-ApplicationTemplates pr\_pegaVF\_appfactory\_data\_appl Yes

pr\_PegaVF\_AppFactory\_Data-DefaultSpaceURLPins pr\_pegaVF\_appfactory\_data\_depla Yes

pr\_PegaVF\_AppFactory\_Data-DeploymentPipelines pr\_pegaVF\_appfactory\_data\_depli Yes

pr\_PegaVF\_AppFactory\_Data-Environments pr\_pegaVF\_appfactory\_data\_envi Yes

pr\_PegaVF\_AppFactory\_Data-Tiers pr\_pegaVF\_appfactory\_data\_tier Yes

pr\_PegaXF\_AppFactory\_Data-Usage pr\_pegaXF\_appfactory\_data\_usag Yes

Selected Class View Has DB Schema Changes

No views to import

Cancel << Back Next >>

Activate Windows Go to Settings to activate Windows.

Agile Workbench Current work Scenario Testing Issues Tracer Clipboard Live UI Live Data Accessibility Performance PEGA

DEV STUDIO Application: New Application Configure Launch portal Create appfactory DEVELOPMENT

Importing AppFactory\_08-07-02.zip Refresh Help Close

Saving data to the database from file AppFactory\_08-07-01\_RC2\_schema.jar

04.76%

Total records: 21 Records moved: 1 Records skipped: 0 Total errors: 0 Time left: 0 seconds

Capture Details

Case types

+ Add a case type

Data types

App

Records

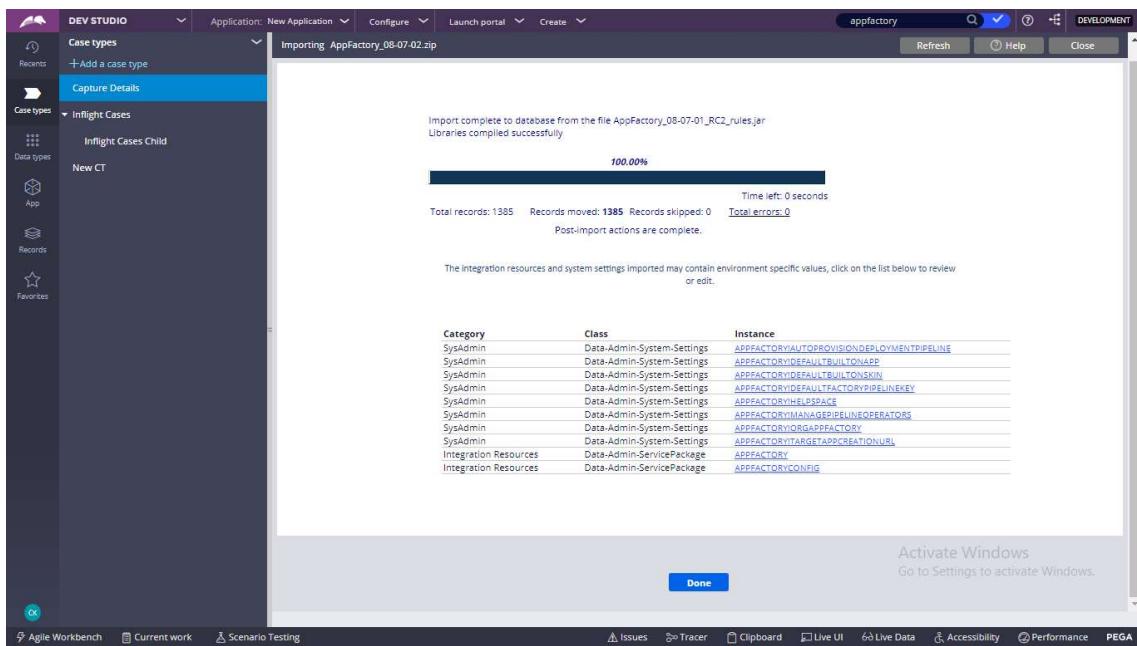
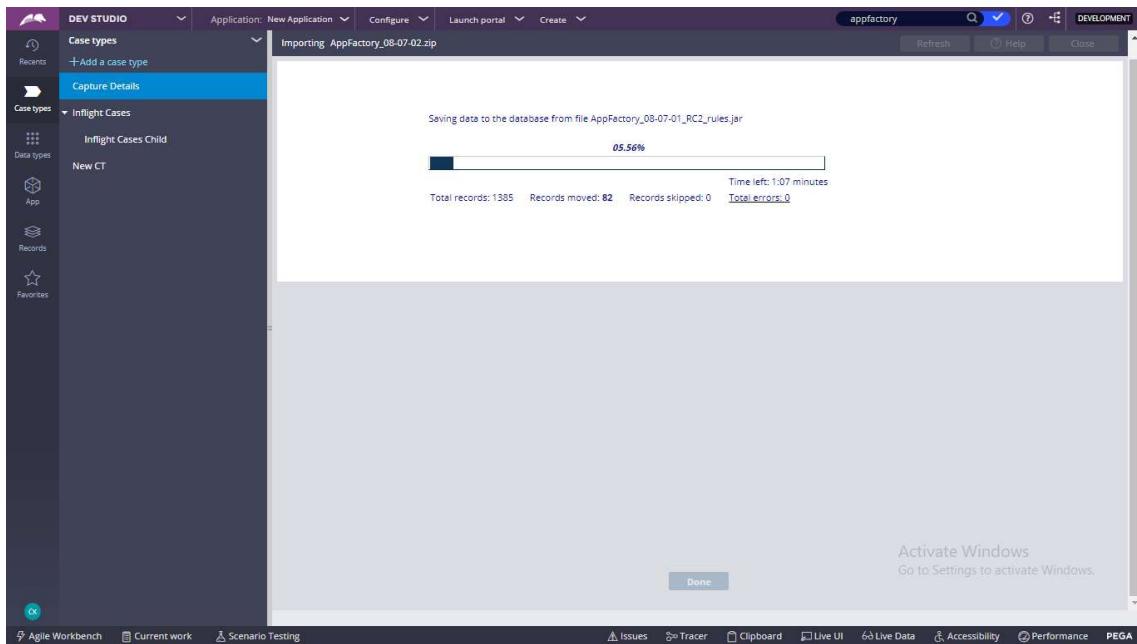
Favorites

Importing AppFactory\_08-07-02.zip

Cancel Next >

Activate Windows Go to Settings to activate Windows.

Agile Workbench Current work Scenario Testing Issues Tracer Clipboard Live UI Live Data Accessibility Performance PEGA



After completion of import make sure to restart the server.

**Below are the steps for installation guide:**

**Note:** The steps from 1 to 7 steps are already completed by Import Wizard.

Importing App Factory,

The first step in getting App Factory configured is to download the component off the Pega marketplace and import it into your system(s).

1. Download App Factory off the Pega marketplace here.
2. Log into Dev Studio in your Pega environment.

Note: If you have multiple environments, log into the environment that will be your development environment. You will be able to export these settings later in the installation process.

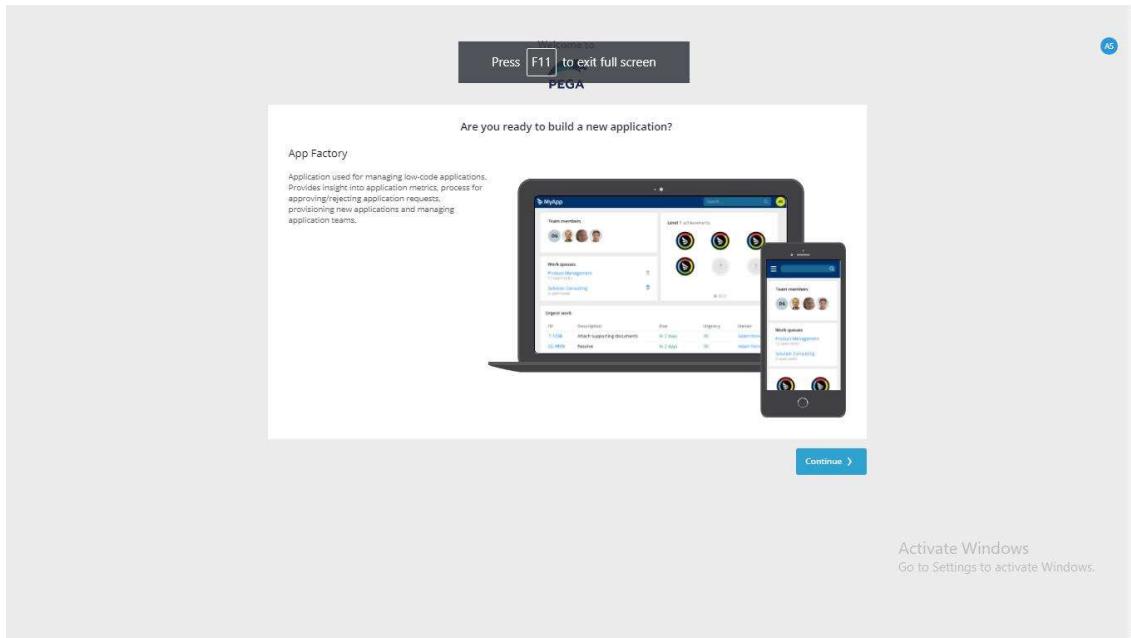
3. Open the import wizard (Configure > Application > Distribution > Import).
4. Select the App Factory zip file (Local file > Choose file) downloaded in Step 1.
5. Proceed through the following steps by clicking the next button. Leave the default settings in each step.
6. Proceed through the zip file details, valid database connections and schema change screens.
7. Apply schema changes by clicking Next and advance to rule import.
8. Import rules to complete the import process.

**9. Restart the server.**

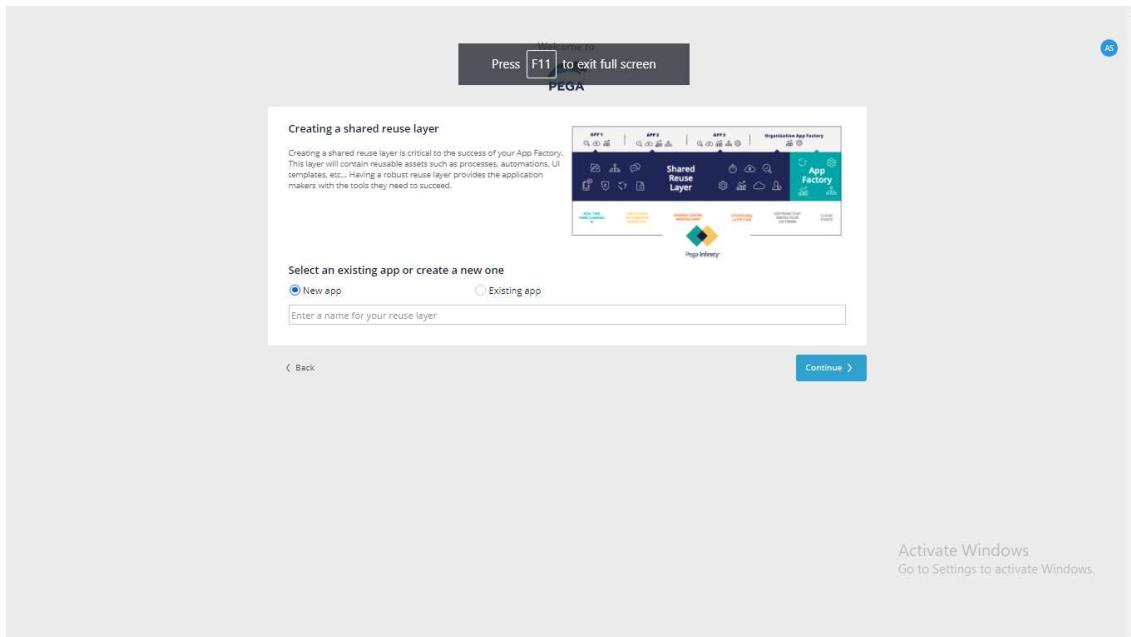
10. Update the AppFactoryAdmin operator record.
  - a. Find the operator by going to Records > Organization > Operator ID.
  - b. Go to the Security tab and uncheck the "Disable Operator" box. Save the updated record.
11. Save As the AppFactorySetup operator.
  - a. Find the operator by going to Records > Organization > Operator ID.
  - b. Save As the operator as a named operator for yourself
  - c. Go to the Security tab on newly created operator and uncheck the "Disable Operator" box.
  - d. Also on the Security tab, update the operator password. Please keep note of the password you choose. Save the updated record.
12. Log off.

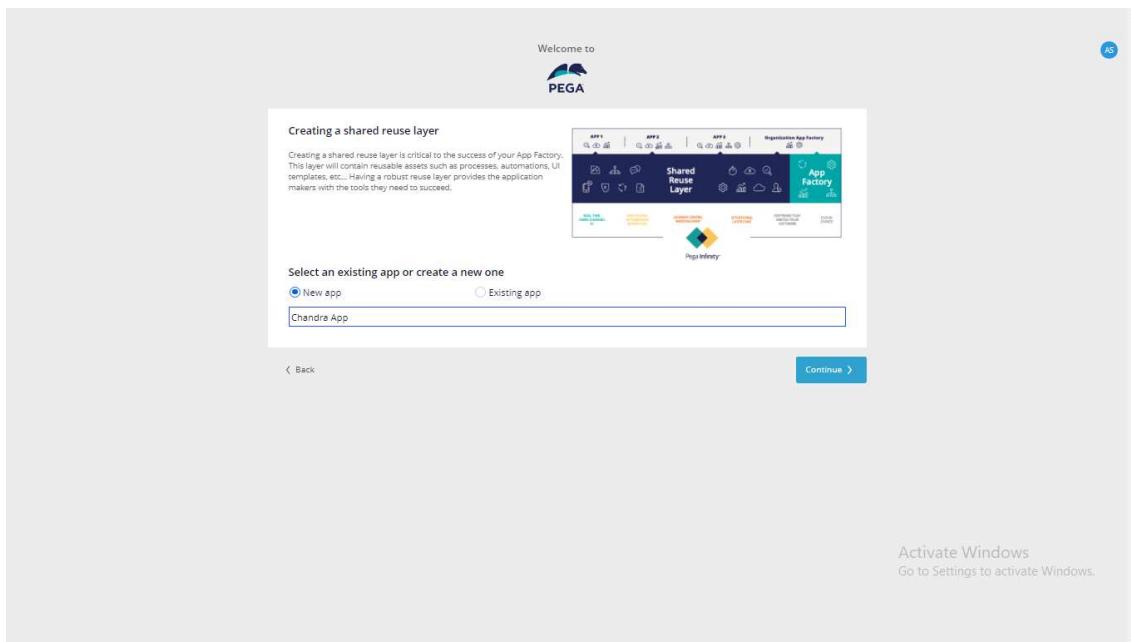
Login with operator which you have created.

Once logged in, you will see a page with some default information about App Factory. Press continue button to move past this screen.

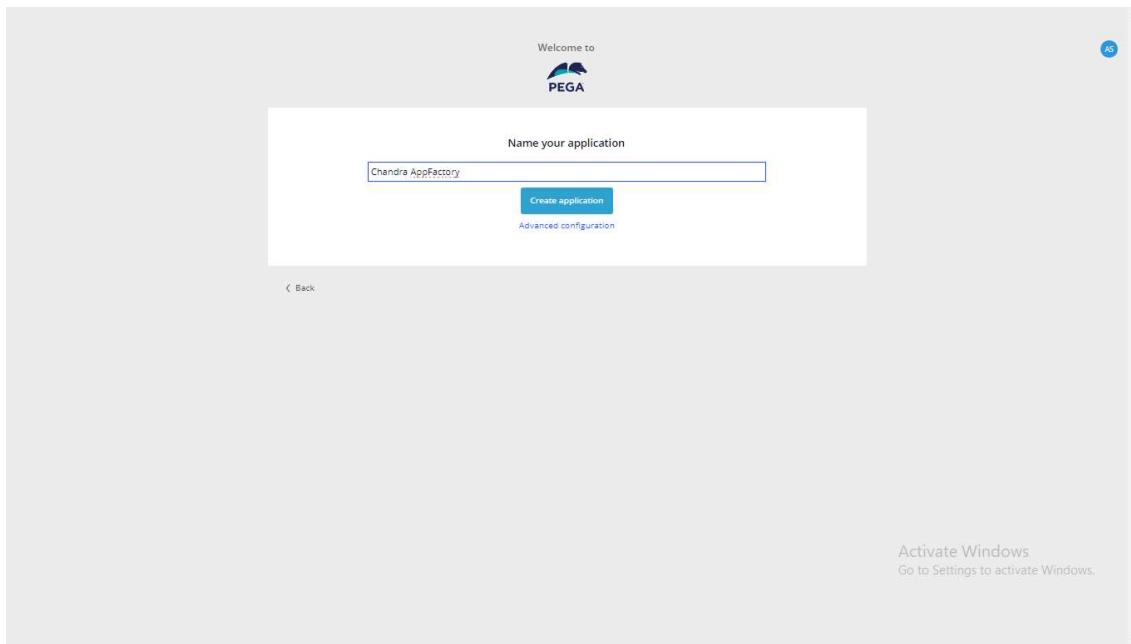


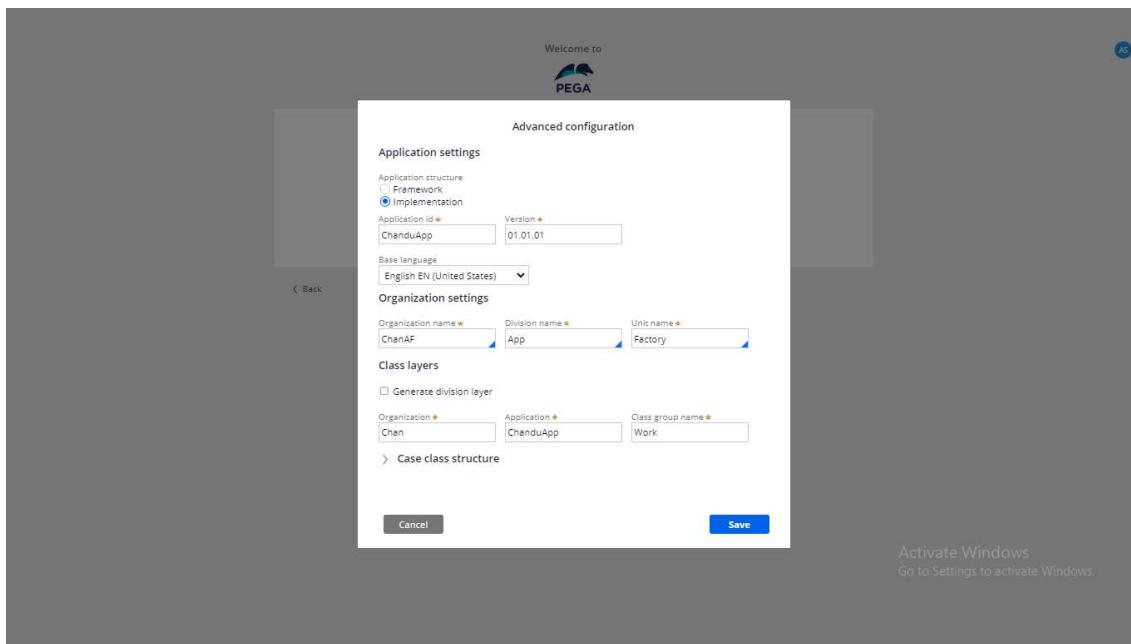
The next page will ask you to provide a name for your reuse layer. Enter the name and continue.





The final page will ask you to provide a name for your organization's App Factory application. This application is used to make customizations in default App Factory.

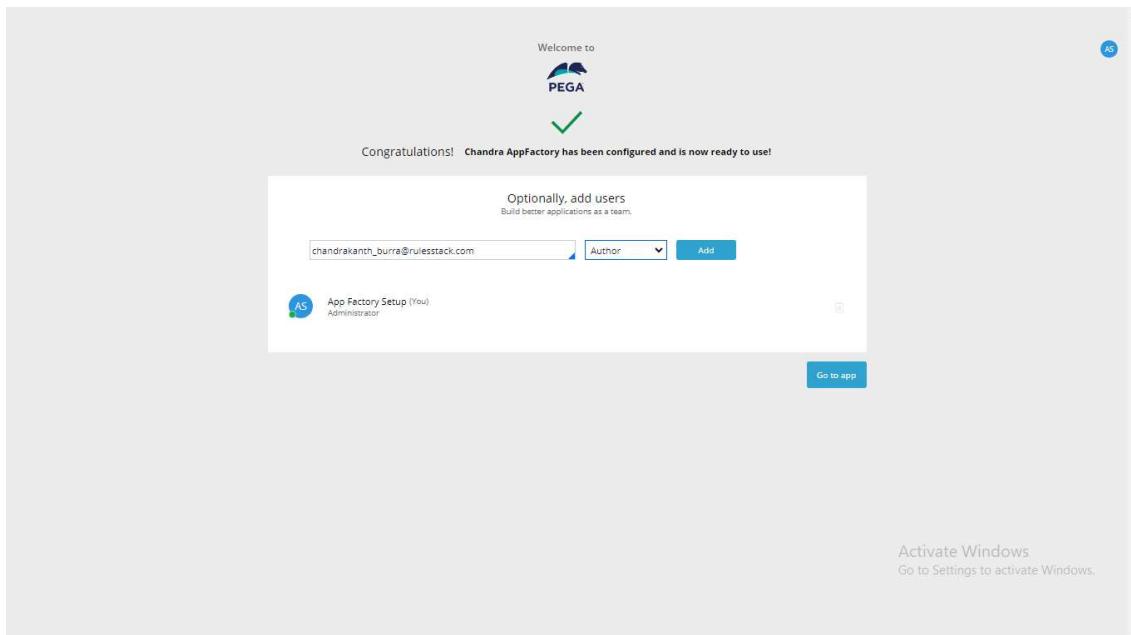




Activate Windows  
Go to Settings to activate Windows.

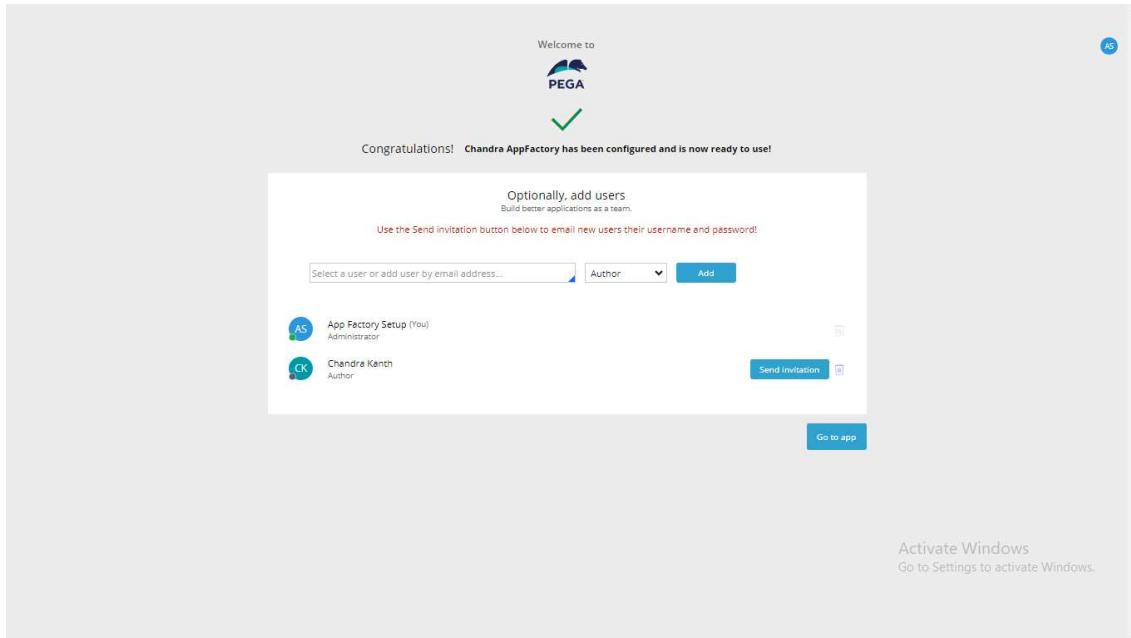
Save and press "Create application" to continue.

Now, Application access will be given to the current operator. You may add/create other operators but have one valid operator to start.



Activate Windows  
Go to Settings to activate Windows.

Added my user.



Now open Application Definition.

The screenshot shows the PEGA Dev Studio Application Definition interface for the application "Chat Bot Implementation". The left sidebar includes icons for Recents, Case types, Data types, App, Records, and Favorites. The main area displays the "Edit Application: Chat Bot Implementation" page. It shows the following sections:

- Built on applications:** One entry: "Theme-Cosmos" Version "04.01".
- Enabled components:** No items. A "Manage components" button is present.
- Presentation:** Skin set to "ChatBotRobo". A checked checkbox "Render in HTML5".
- Application URL alias:** URL "http://localhost:8787/prweb/PRServlet/app/chat-bot-implementation/" and a "Change URL alias" button.
- Development branches:** "+ Add branch" button, followed by "No items".
- Application rulesets:** "+ Add ruleset" button, followed by a list of four items:
  - 1 ChatBotRobo:01-01
  - 2 ChatBotRoboInt:01-01
  - 3 Chat:01-01
  - 4 ChatInt:01-01

In the bottom right corner of the main window, there is a watermark-like message: "Activate Windows Go to Settings to activate Windows." The bottom navigation bar includes links for Agile Workbench, Current work, Scenario Testing, Issues, Tracer, Clipboard, Live UI, Live Data, Accessibility, Performance, and PEGA.

Add AFChatBot:01-02 ruleset and save.

The screenshot shows the Pega DEV STUDIO interface for editing an application named 'Chat Bot Implementation'. The 'Application rulesets' section on the right side of the screen lists five rulesets:

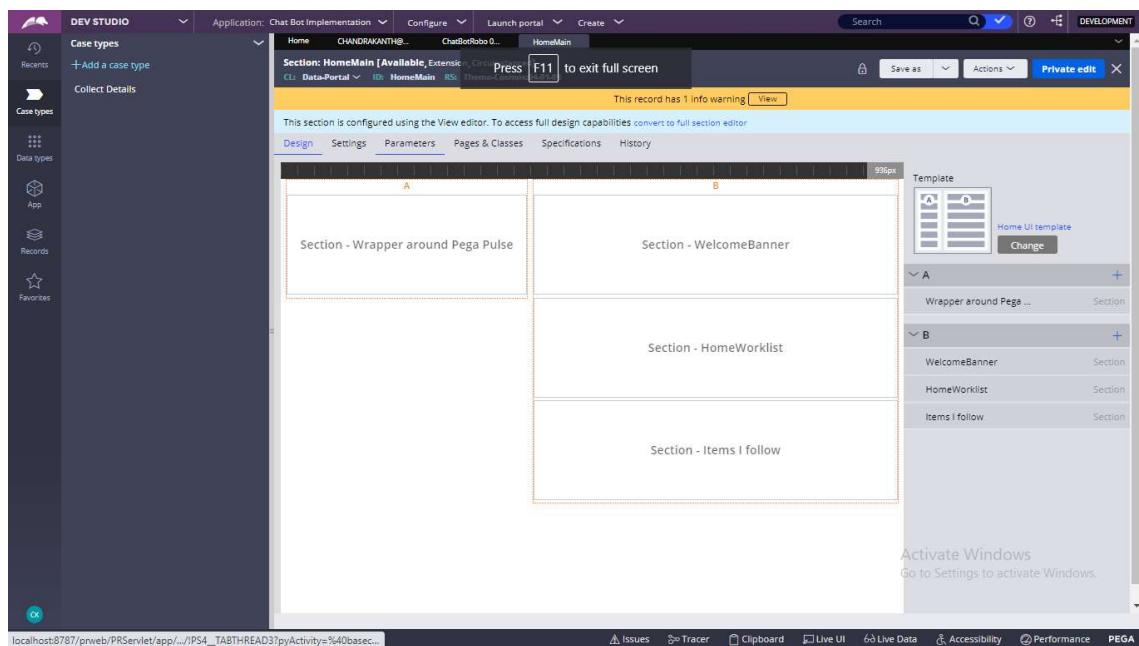
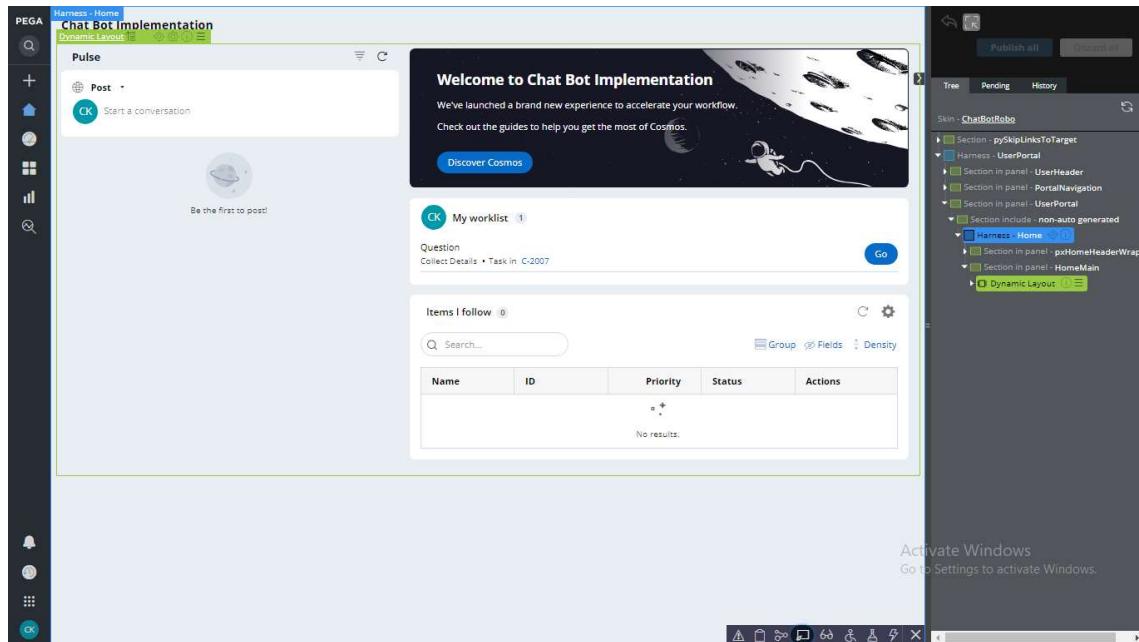
- 1 ChatBotRobo:01-01
- 2 ChatBotRoboInt:01-01
- 3 Chat:01-01
- 4 ChatInt:01-01
- 5 AFChatBot:01-02

The fifth item, 'AFChatBot:01-02', is highlighted with a blue selection bar. At the top right of the application edit screen, there is a 'Save' button.

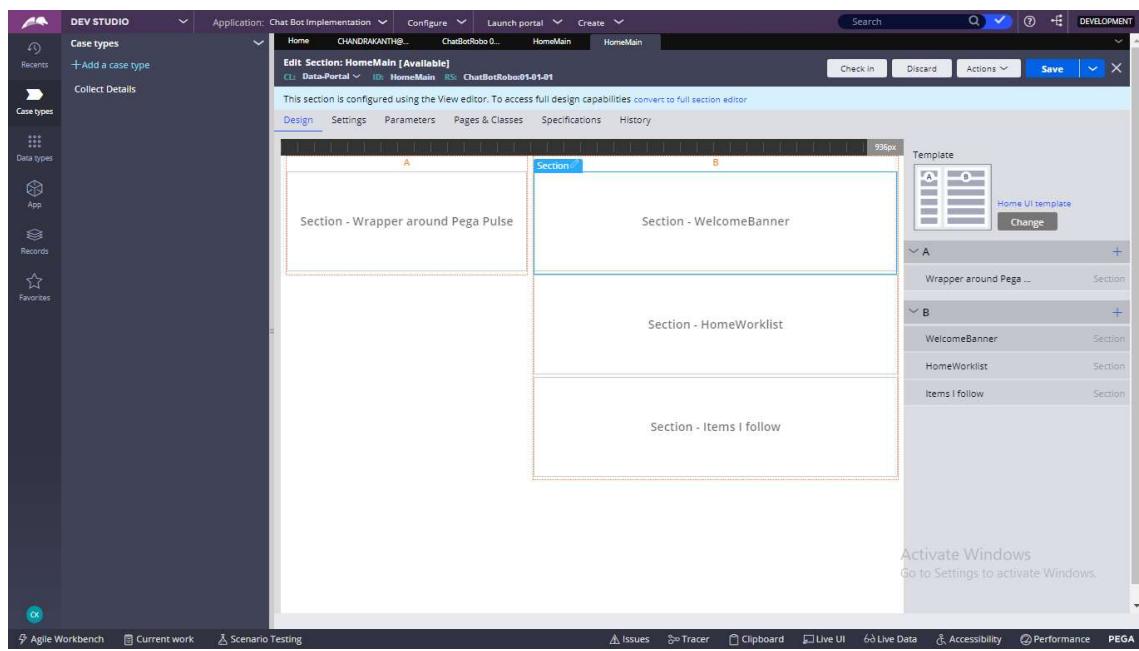
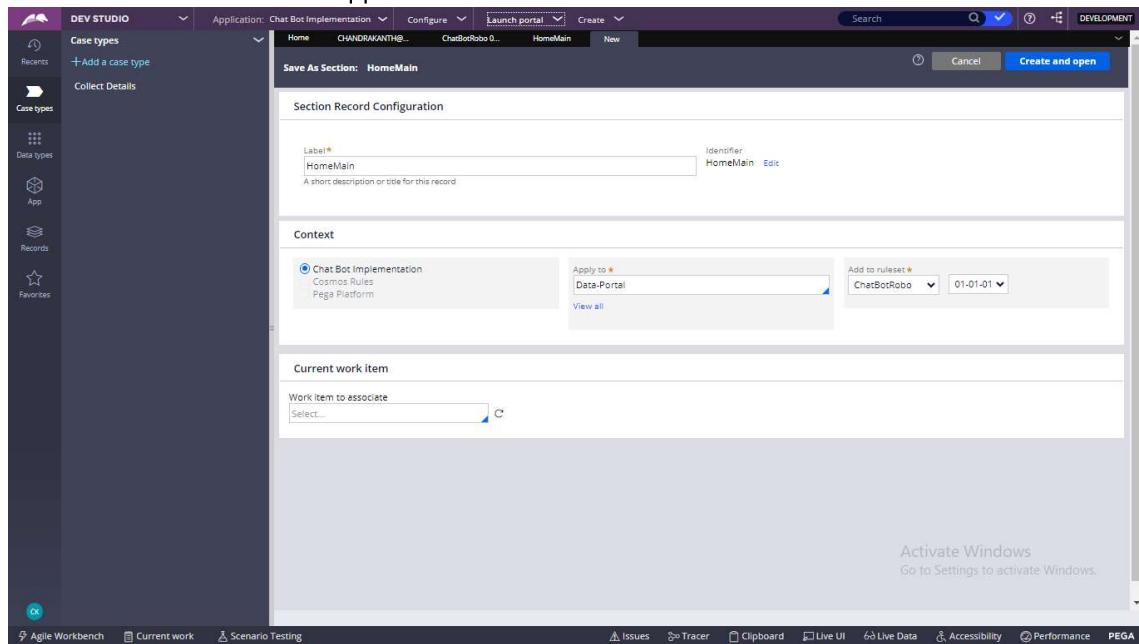
Launch User Portal.

This screenshot is identical to the one above, showing the 'Edit Application: Chat Bot Implementation' screen in Pega DEV STUDIO. The 'Application rulesets' section displays the same list of five rulesets, with 'AFChatBot:01-02' highlighted. The overall layout and interface elements are consistent with the first screenshot.

Using LiveUI, open HomeMain section.



Save as this section into our Application Ruleset.



Now open AFChatBot:01-02 ruleset.

Validation mode

- Application Validation
- Ruleset Validation

Secure Version	Description	Approval required	Checked out	All rules
01-02-01	AFChatBot:01-02-01		0	56

IN APPLICATION VALIDATION MODE 'REQUIRED RULESETS' ARE DISABLED

Effective Start Date: 11/30/2021

Enter Password To: Add/Update Version

Buttons: Unlock and Save, Save, Delete

Message: Activate Windows  
Go to Settings to activate Windows.

Click on Rule Count and filter it with section.

Rule type	Rule name	Applies to	Available	Updated by	Last updated	Circumstance
MLClassification	e78a3125-0f...		Yes	Samuel Tremlett	1 year 8 months ago	
DATA-DECISION-REQUEST-MCP...	DATA-DECISION-REQUEST-MC...		Yes	Samuel Tremlett	4 years ago	
Data-Decision-Request-MCP-W...	Data-Decision-Request-MCP-W...		Yes	Debug	4 years ago	
b0d77c7b633e444616b8064...			Yes	Samuel Tremlett	1 year 8 months ago	
pyInteractionDF	Data-Decision-Request-MCP-W...		Yes	Samuel Tremlett	1 year 8 months ago	
pyInteractionDF	Data-Decision-Request-MCP-W...		Yes	Debug	1 year 8 months ago	
D_AccessGroup	Data-Admin-Operator-Acces...		Yes	Samuel Tremlett	1 year 8 months ago	
D_OperatorDetails	Data-Admin-Operator-ID		Yes	Samuel Tremlett	1 year 8 months ago	
PopulateAppInfoOutboundData	Work-Channel-Interaction		Yes	Samuel Tremlett	1 year 8 months ago	
Data Transform	PopulateManagedOutboundD...	Work-Channel-Interaction	Yes	Samuel Tremlett	1 year 8 months ago	
Data Transform	PopulateMyAppsOutboundD...	Work-Channel-Interaction	Yes	Samuel Tremlett	1 year 8 months ago	
Data Transform	PopulateProfileOutboundD...	Work-Channel-Interaction	Yes	Samuel Tremlett	1 year 8 months ago	
Decision Data	pyInteractionTaxonomy	Data-Decision-Request-MCP-W...	Yes	Samuel Tremlett	1 year 8 months ago	
Decision Data	pyInteractionTaxonomy	Data-Decision-Request-MCP-W...	Yes	Debug	1 year 8 months ago	
Decision Table	pyGetActionFromIVACConfig	Data-Decision-Request-MCP-W...	Yes	Samuel Tremlett	1 year 8 months ago	
Decision Table	pyGetActionFromIVACConfig	Data-Decision-Request-MCP-W...	Yes	Samuel Tremlett	1 year 8 months ago	
Field Value	b05ce8eb4b86d4da282629...	Embed-Channel-Action-Comm...	Yes	Samuel Tremlett	1 year 8 months ago	
Field Value	b05ce8eb4b86d4da282629...	Embed-Channel-Action-Comm...	Yes	Samuel Tremlett	1 year 8 months ago	
Field Value	b05ce8eb4b86d4da282629...	Embed-Channel-Action-Comm...	Yes	Samuel Tremlett	1 year 8 months ago	
Field Value	b05ce8eb4b86d4da282629...	Embed-Channel-Action-Comm...	Yes	Samuel Tremlett	1 year 8 months ago	
Field Value	b05ce8eb4b86d4da282629...	Embed-Channel-Action-Comm...	Yes	Samuel Tremlett	1 year 8 months ago	
Field Value	b05ce8eb4b86d4da282629...	Embed-Channel-Action-Comm...	Yes	Samuel Tremlett	1 year 8 months ago	
Field Value	b05ce8eb4b86d4da282629...	Embed-Channel-Action-Comm...	Yes	Samuel Tremlett	1 year 8 months ago	

Activate Windows  
Go to Settings to activate Windows.

DEV STUDIO Application: Chat Bot Implementation Configure Launch portal Create Search DEVELOPMENT

Case types +Add a case type Collect Details Case types Data types App Records Favorites

AFChatBot

Rule type Rule name Applies to Available Updated by Last updated Circumstance

Rule type	Rule name	Applies to	Available	Updated by	Last updated	Circumstance
Section	EmbeddedAFChatbot	@baseclass	Yes	Samuel Tremlett	1 year 8 months ago	
Section	PegaAppFactoryMainArea	Data-Portal	Yes	Drew PiekarSKI	1 year 8 months ago	
Section	PegaAppFactoryTabBar	Data-Portal	Yes	Drew PiekarSKI	1 year 8 months ago	
Section	pyEditElement	Data-NLP-Taxonomy	Yes	Samuel Tremlett	1 year 8 months ago	pyInteractionTaxon...

Refresh Export X

Activate Windows Go to Settings to activate Windows.

Agile Workbench Current work Scenario Testing Issues Tracer Clipboard Live UI Live Data Accessibility Performance PEGA

The screenshot shows the Pega DEV STUDIO interface with the application set to 'Chat Bot Implementation'. The main panel displays a table of rules under the 'AFChatBot' section. The columns are labeled: Rule type, Rule name, Applies to, Available, Updated by, Last updated, and Circumstance. The table contains four rows of data, each corresponding to a different section: 'EmbeddedAFChatbot' (Applies to @baseclass), 'PegaAppFactoryMainArea' (Applies to Data-Portal), 'PegaAppFactoryTabBar' (Applies to Data-Portal), and 'pyEditElement' (Applies to Data-NLP-Taxonomy). The 'pyEditElement' row includes a link to 'pyInteractionTaxon...'. The interface includes standard Pega navigation elements like 'Case types', 'Data types', 'Records', and 'Favorites' on the left, and various monitoring and performance tabs at the bottom.

Open EmbeddedAFChatBot section.

DEV STUDIO Application: Chat Bot Implementation Configure Launch portal Create Search DEVELOPMENT

Case types +Add a case type Collect Details Case types Data types App Records Favorites

AFChatBot

Rule type Rule name Applies to Available Updated by Last updated Circumstance

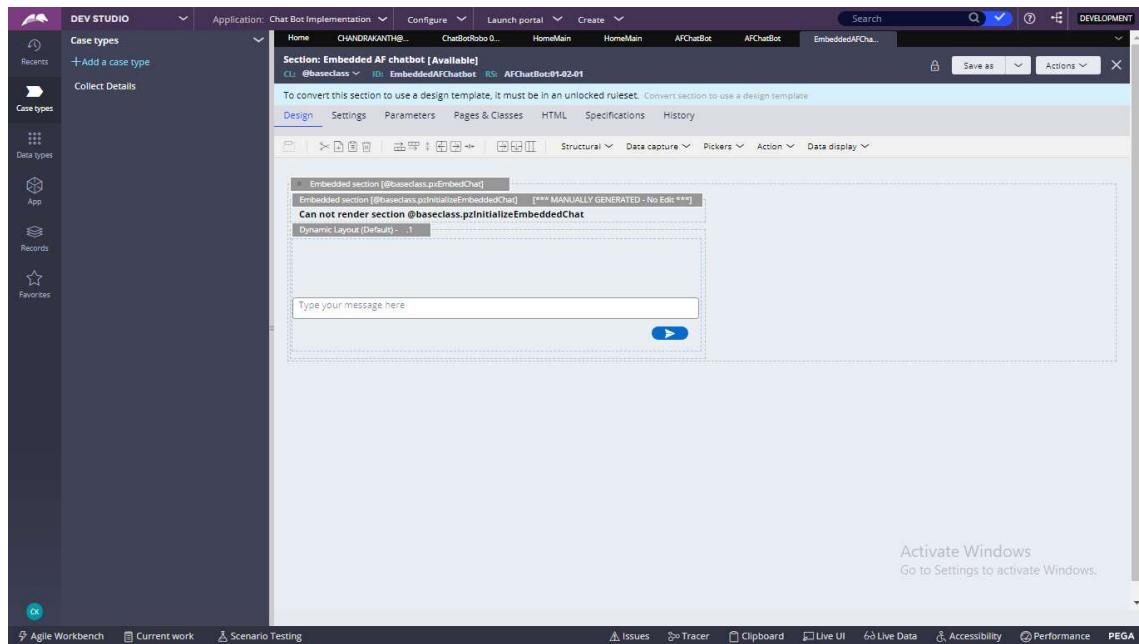
Rule type	Rule name	Applies to	Available	Updated by	Last updated	Circumstance
Section	EmbeddedAFChatbot	@baseclass	Yes	Samuel Tremlett	1 year 8 months ago	
Section	PegaAppFactoryMainArea	Data-Portal	Yes	Drew PiekarSKI	1 year 8 months ago	
Section	PegaAppFactoryTabBar	Data-Portal	Yes	Drew PiekarSKI	1 year 8 months ago	
Section	pyEditElement	Data-NLP-Taxonomy	Yes	Samuel Tremlett	1 year 8 months ago	pyInteractionTaxon...

Refresh Export X

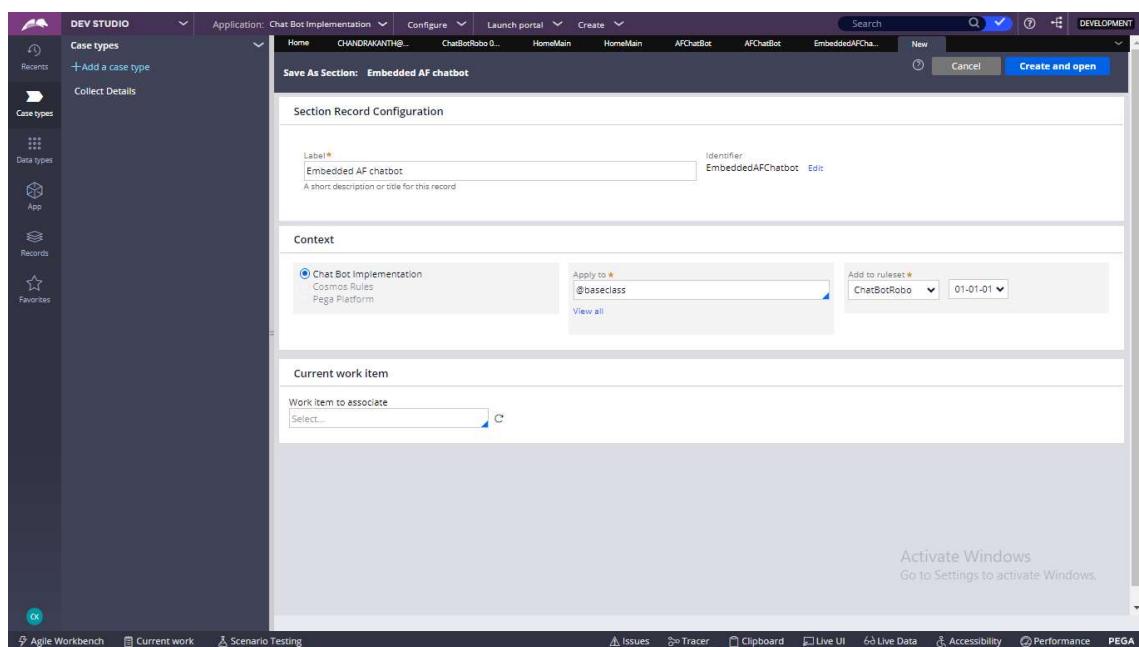
Activate Windows Go to Settings to activate Windows.

Agile Workbench Current work Scenario Testing Issues Tracer Clipboard Live UI Live Data Accessibility Performance PEGA

This screenshot is identical to the one above, showing the Pega DEV STUDIO interface with the application set to 'Chat Bot Implementation'. The main panel displays the same table of rules under the 'AFChatBot' section. The 'EmbeddedAFChatbot' row is highlighted, indicating it is currently selected. The interface includes standard Pega navigation elements like 'Case types', 'Data types', 'Records', and 'Favorites' on the left, and various monitoring and performance tabs at the bottom.



Save as this section into your Application Ruleset.



Switch to Definition tab and add AppFactory:01-02 ruleset.

The screenshot shows the Pega DEV STUDIO interface with the 'Case types' workspace selected. The main window displays the 'Edit Application: Chat Bot Implementation' screen. In the 'Application rulesets' section, under the '+ Add ruleset:' heading, a new entry 'AppFactory:01-02' has been added, bringing the total count to 6. The application URL alias is set to <http://localhost:8787/prweb/PRServlet/app/chat-bot-implementation/>.

This screenshot is identical to the one above, showing the 'Definition' tab in Pega DEV STUDIO. The difference is in the browser address bar, which now displays the URL [localhost:8787/prweb/PRServlet/app/\\_/IP\\$4\\_TABTHREAD4?pyActivity=ReloadHa...](localhost:8787/prweb/PRServlet/app/_/IP$4_TABTHREAD4?pyActivity=ReloadHa...), indicating that the application has been deployed and is running.

Open AppFactory ruleset.

The screenshot shows the Pega DEV STUDIO interface. The left sidebar has sections for Case types, Data types, App, Records, and Favorites. The main area is titled "Edit Ruleset: AppFactory RuleSet" with the ID "AppFactory". It displays validation mode (Application Validation selected), rule information (Rule count: 1081), and a secure version history table. The table shows four versions: 01-02-01 (checked out, 969 rules), 01-02-02 (checked in, 11 rules), 01-02-03 (checked in, 15 rules), and 01-02-10 (checked in, 15 rules). Below the table is a message about application validation mode. At the bottom right, there is an "Activate Windows" message.

Click on Rule count number and filter by section.

The screenshot shows the same Pega DEV STUDIO interface as above, but with a modal dialog open over the rule list. The dialog is titled "Rule type" and contains a dropdown menu with several options: "Access of Role to Object", "Access of Role Name", "Access When", "Access When", and "Access When". The "Section" option is checked. A search bar and "Apply" and "Cancel" buttons are also present in the dialog.

Open AppFactoryChatBot section.

Section: App factory chat bot [Available]

CL: @baseclass ~ ID: AppFactoryChatBot RSS: AppFactory01402-01

This record has 1 info warning [View]

Design Settings Parameters Pages & Classes **HTML** Specifications History

**Generation options**

Auto-generated HTML

Specialty component

Omit extra spaces

Accessibility: No

**HTML source**

```

1 <div id="chatFloatingButton">
2   <i class="pi pi-chats-solid cb-icon"></i>
3 </div>
4 <div id="AfChatbot" style="display:none;">
5   <i class="pi pi-circle-minus-solid cb-close"></i>
6 
7 <pega:include name="EmbeddedAfChatbot" type="Rule:HTML-Section"></pega:include>
8 
9 <script>
10 $(document).ready(function () {
11   $('#chatFloatingButton').click(function() {
12     $('#AfChatbot').hide();
13     $('#AfChatbot').show('fast');
14   });
15 
16   $('.cb-close').click(function() {
17     $('#AfChatbot').hide('fast');
18     $('#chatFloatingButton').show();
19   });
20 });
21 //static-content-hash-trigger-GCC
22 </script>
23 </style>
24 /* chat bot styling */
25 /* chat bot styling */
26 /* chat bot styling */

```

Activate Windows  
Go to Settings to activate Windows.

Save as this section into your Application Ruleset.

Save As Section: App factory chat bot

Cancel Create and open

**Section Record Configuration**

Label\*: App factory chat bot Identifier: AppFactoryChatBot Edit

A short description or title for this record

**Context**

Chat Bot Implementation  
Cosmos Rules  
Pega Platform

Apply to\*: @baseclass Add to ruleset\*: ChatBotRobo 01-01-01

**Current work item**

Work item to associate Select...

Activate Windows  
Go to Settings to activate Windows.

DEV STUDIO Application: Chat Bot Implementation Configure Launch portal Create Search   Actions Save DEVELOPMENT

Case types +Add a case type Collect Details

Edit Section: App factory chat bot [Available]

This record has 1 info warning

This section does not follow section best practices of using a design template. Convert section to use a design template.

Design Settings Parameters Pages & Classes **HTML** Specifications History

Generation options

Auto-generated HTML

Specialty component

Omit extra spaces

Accessibility

HTML source

```

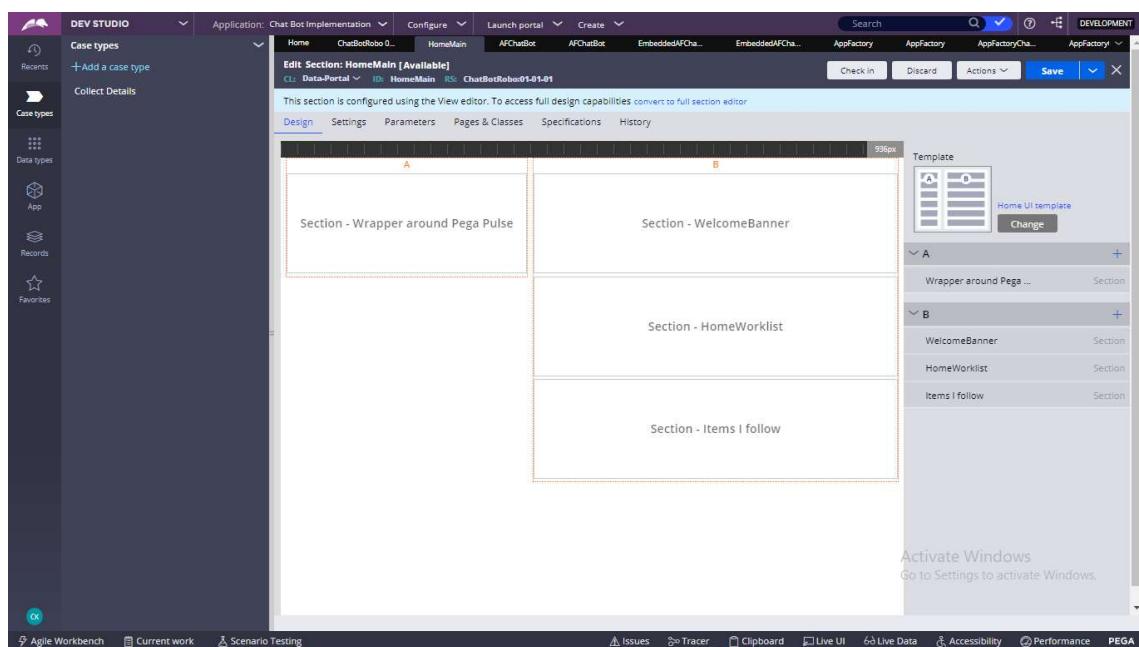
1 <div id="chatFloatingButton">
2   <i class="pi pi-chats-solid cb-icon"></i>
3 </div>
4 <div id="AfChatbot" style="display:none;">
5   <i class="pi pi-circle-minus-solid cb-close"></i>
6
7 <pega:include name="EmbeddedAfChatbot" type="Rule-HTML-Section"></pega:include>
8
9 <script>
10  $(document).ready(function ($) {
11    $("#chatFloatingButton").click(function() {
12      $("#AfChatbot").show("fast");
13      $("#AfChatbot").hide();
14    });
15
16    $(".cb-close").click(function() {
17      $("#AfChatbot").hide("fast");
18      $("#chatFloatingButton").show();
19    })
20  });
21 //static-content-hash-trigger-GCC
22 </script>
23
24 <style>

```

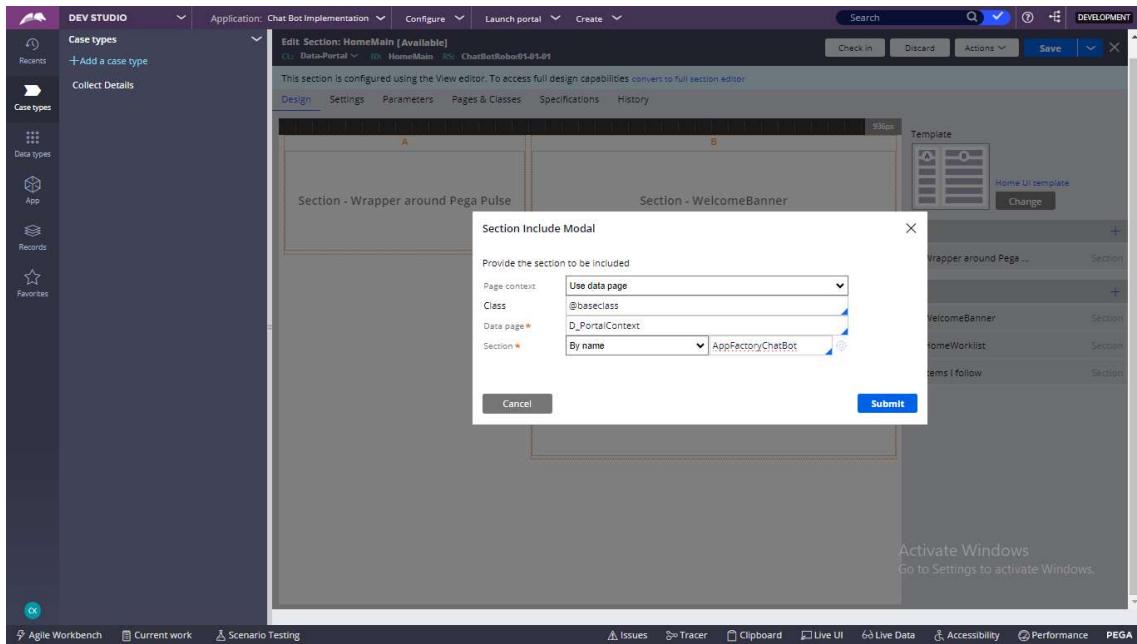
Activate Windows  
Go to Settings to activate Windows.

Agile Workbench Current work Scenario Testing Issues Tracer Clipboard Live UI Live Data Accessibility Performance PEGA

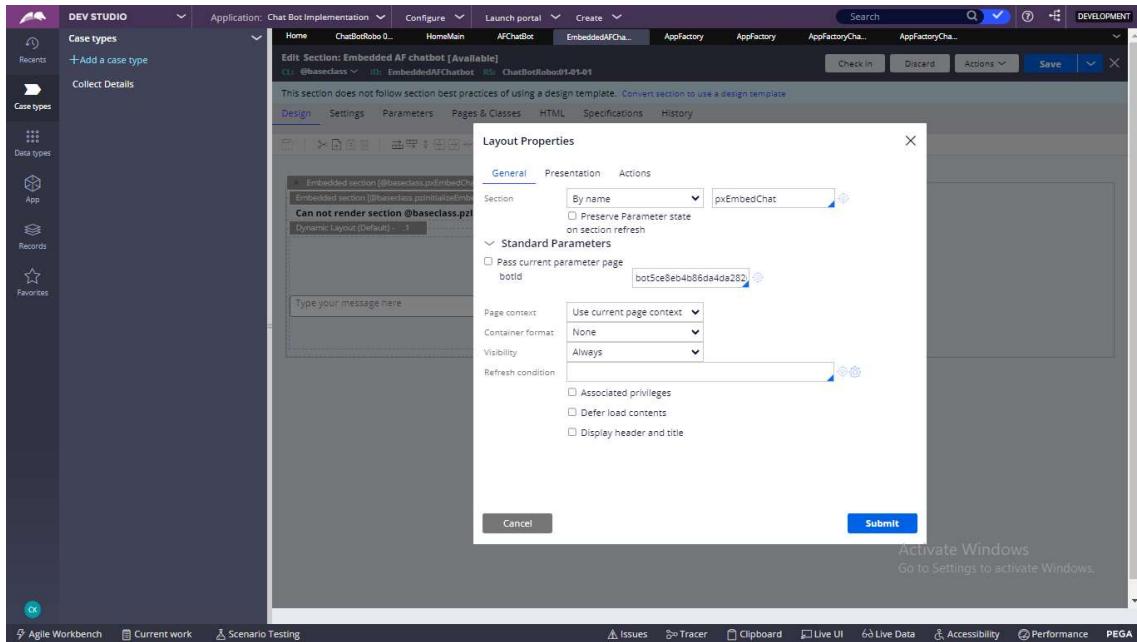
Open HomeMain section.



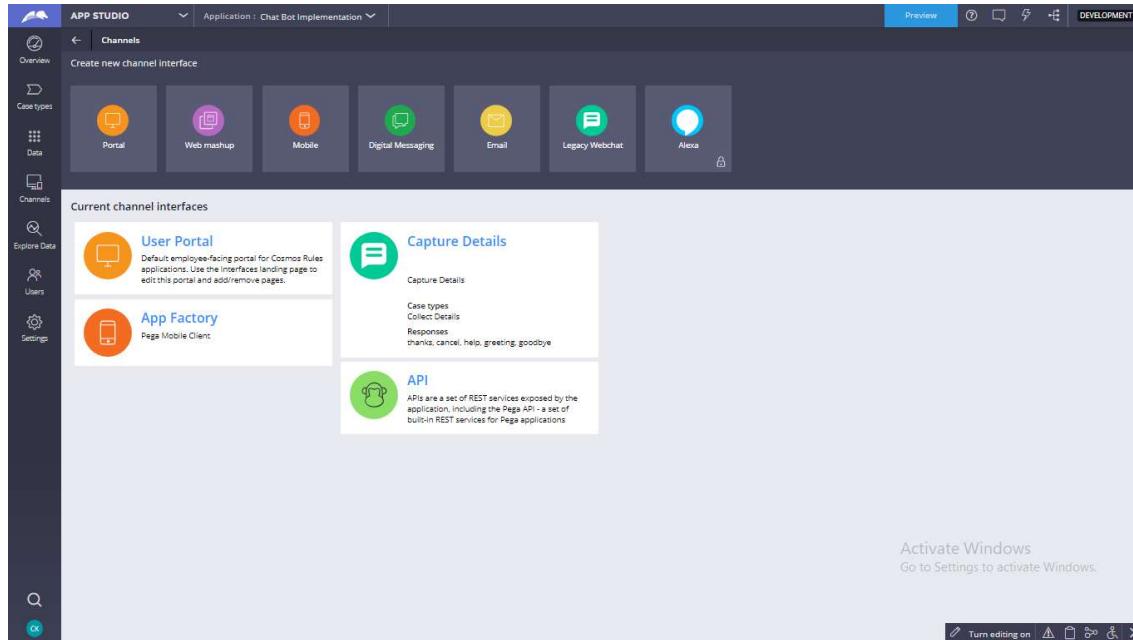
And add an embedded section and submit and save.



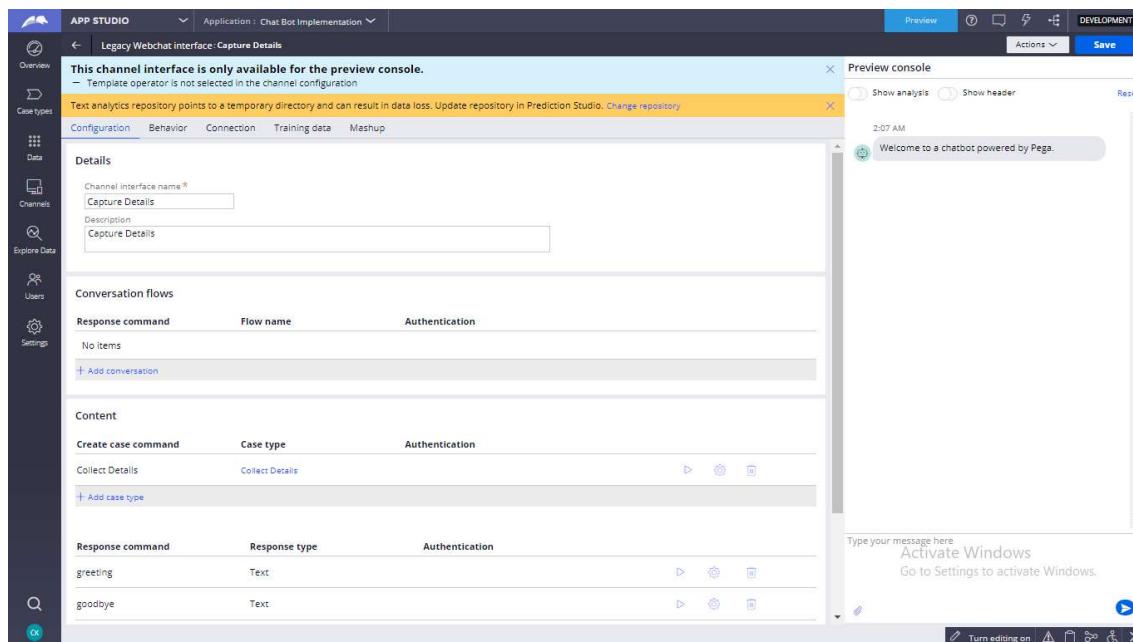
Open Embedded AF Chatbot section and we need to replace our botid here.



Switch to App Studio.



Open webchat interface which we created.



Open clipboard and search for botid.

Property value or name contains 'botid'

Property	Property Reference	Value
PyBotId	ChannelConfig.pyBotId	bot38caa5b69f7447d889e5f43bfd9d846
PyBotId	channelUser.pyBotId	bot38caa5b69f7447d889e5f43bfd9d846
PyBotId	pyBotConfig.pyBotId	bot38caa5b69f7447d889e5f43bfd9d846
PyBotId	pyInteractionCase.pxChannelUser.pyBotId	bot38caa5b69f7447d889e5f43bfd9d846
PyLabel	pyTempPage.pxClipboardPage(111).pxClipboardPage(1).pyLabel	D_pzIntegrationChange[botid:"bot38caa5b69f7447d889e5f43bfd9d846"]
PyBotId	D_pxAppViews.pxResults(3).pyMCPChannel.pyBotId	bot38caa5b69f7447d889e5f43bfd9d846
botid	D_pzIntegrationChange_pe@8128093653897pz.pxDPParameters.botid (null/empty)	
botid	D_pzIntegrationChange_pe@8128093653897pz.pxDPParameters.botid (null/empty)	

Copy botid.

**bot38caa5b69f7447d889e5f43bfd9d846** – This will be unique ID.

Switch back to Dev Studio and open Embedded AF Chatbot section and paste botid.

Layout Properties

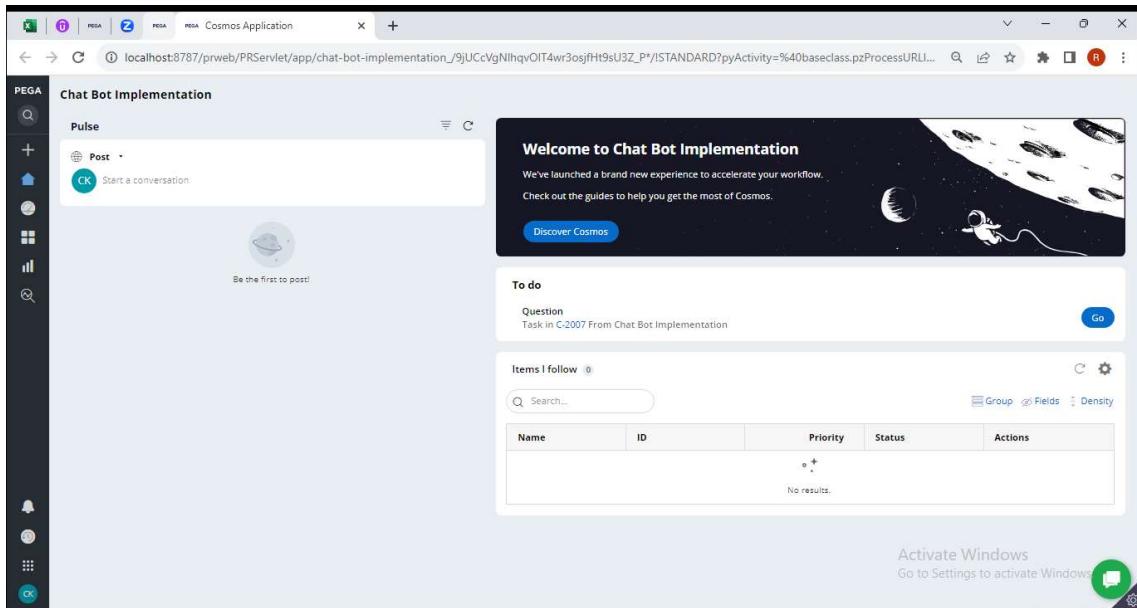
General Presentation Actions

Section: By name pxEmbedChat

Pass current parameter page: botid

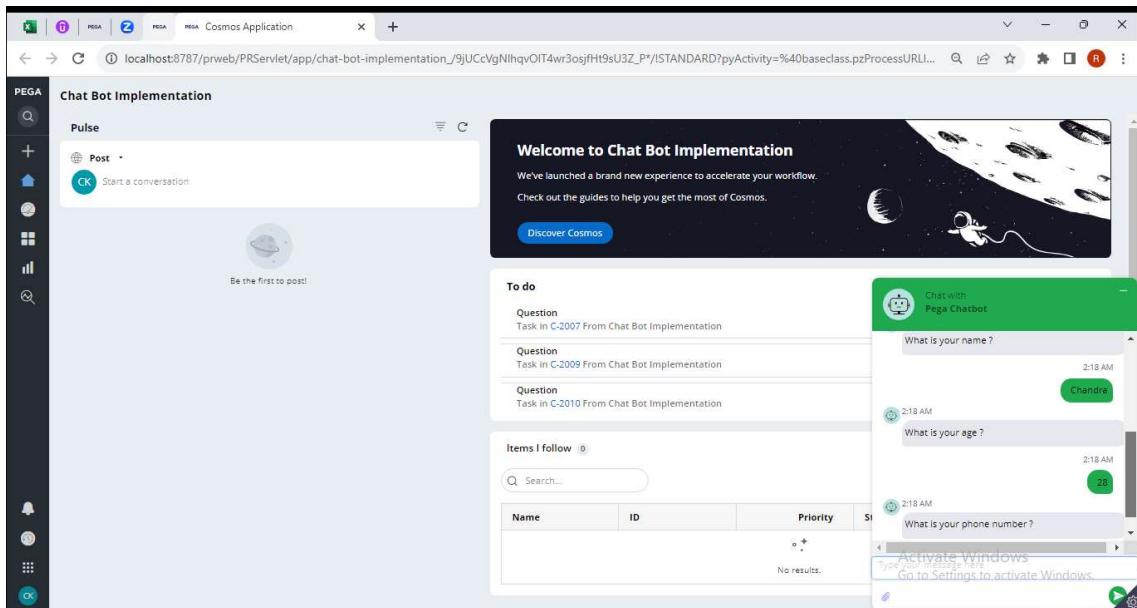
Save all your changes and reload the portal.

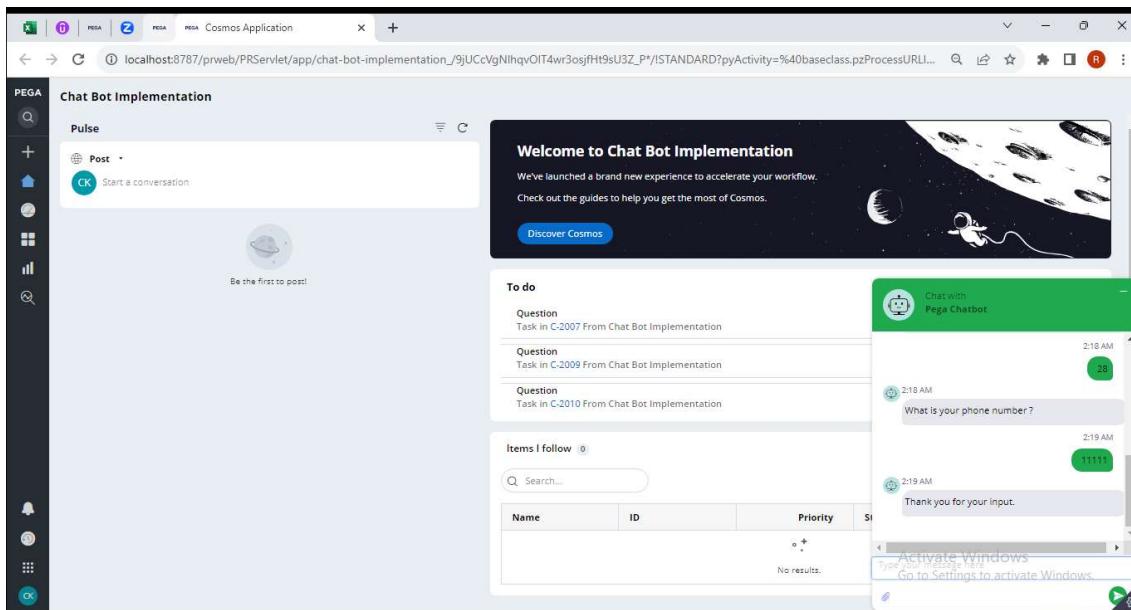
Let's see the magic here.



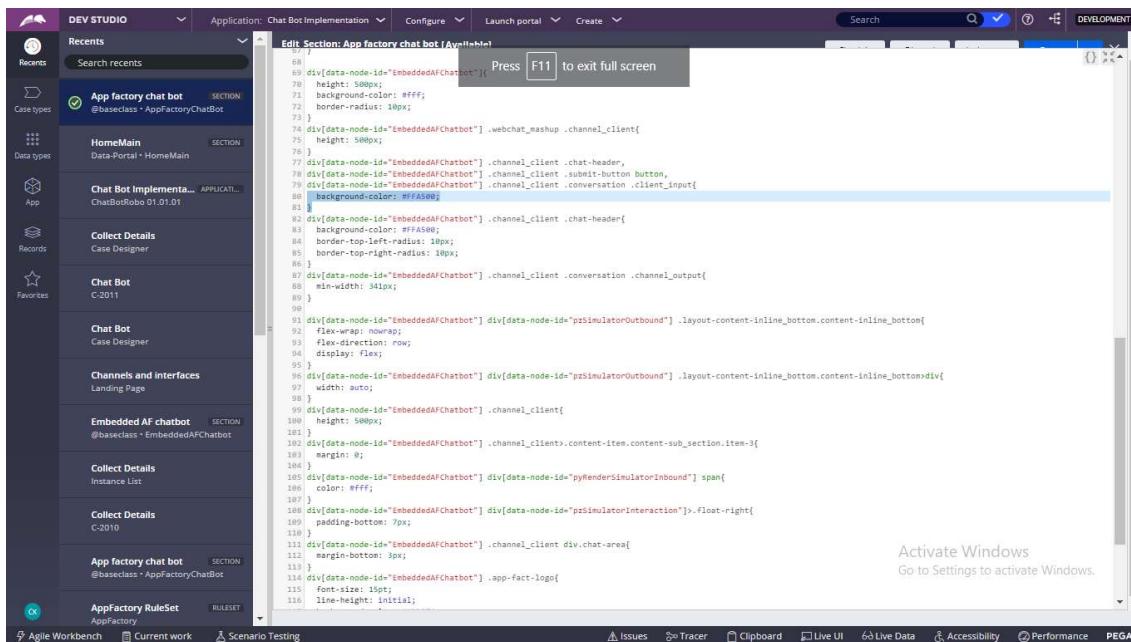
In the bottom right we can see an icon.

We can see Chatbot is asking for our details.





We can also customize background colour and icon colour of an icon in the AppFactoryChatBot section.



Colour is changed for Chatbot icon.

The screenshot shows the Pega Chat Bot Implementation interface. At the top, there's a banner with the text "Welcome to Chat Bot Implementation" and "Discover Cosmos". Below the banner, there's a "To do" section with two items: "Question Task in C-2007 From Chat Bot Implementation" and "Question Task in C-2009 From Chat Bot Implementation". To the right of the "To do" section is a chat window titled "Chat with Pega Chatbot". The chat window shows a conversation where the bot asks for the user's name and provides instructions on how to activate Windows.

Cases are created.

The screenshot shows the Pega Dev Studio interface. On the left, there's a sidebar with "Recent", "Case types", "Data types", "App", "Records", and "Favorites". The main area displays a table of "Instances" for the "Collect Details" class. The table has columns for "ID\*", "Short description", "Updated on\*", "Updated by", and "Actions". The data shows five rows of cases, all labeled "Collect Details".

ID*	Short description	Updated on*	Updated by
C-2010	Collect Details	8/22/2023 2:19 AM	Chandra Kanth
C-2009	Collect Details	8/22/2023 2:16 AM	Chandra Kanth
C-2008	Collect Details	8/22/2023 1:38 AM	Chandra Kanth
C-2007	Collect Details	8/22/2023 1:38 AM	Chandra Kanth
C-2006	Collect Details	8/22/2023 1:38 AM	Chandra Kanth

Opening the latest case.

Pega Clipboard HEPDCBRQTEUHB1ZD7CN2R63CMSW56Q6Z2A	
D_pzGetPropertiesForDataType[show!]	ActionFlowIndex
D_pzGetRecordManagementPreferences	ActionFlowKey
D_pzMasnupChannel [Data-Channel-Mas	ActionFlowName
D_pzPreferenceStore	Age
D_pzPreferenceStore[PreferenceOper	28
D_pzProgressUpdateForCoverage (Log-Pi	DocumentsAndFilesCount
D_pzRBCategories	0
D_pzRBCategories[CategoryType:"All"]	Name
D_pzRenderFeedContext	Chandra
D_pzRenderFeedContext[Context:"CHI	PhoneNumber
D_pzReportBrowser7 (Data-Report-Brow	11111
D_pzTemplateNav (@baseclass)	pxApplication
D_RAApplicationClassesSimple	ChatBotRobo
D_RAApplicationClassesSimple[AppVe	pxApplicationVersion
D_SkinList (Code-Pega-List)	01.01.01
Declare_AppExploreData (Code-Pega-Lis	pxBreadcrumbsCount
Declare_CaseTree (Rule-Obj-Class)	0
Declare_MyCheckedOutRules	pxCommitDateTime
D_Clare_MyCheckedOutRules[persona	20230822T061944.391 GMT
D_Clare_pyDisplay (Pega-UI-RunTime-Dis	pxCoveredCount
D_Clare_pzRecentsCache (Code-Pega-List	0
D_Clare_RuleTypeMenu (Data-RuleForm-	pxCoveredCountOpen
pyActionInfo (Pega-UI-RunTime-Display)	0
pyDocuments (classless)	pxCoveredCountUnsatisfied
pyPortal (Data-Portal)	0
pyReportParameters_temp (Code-Pega-L	pxCreateDateTime
pyReportParamPage (Embed-QueryInput	20230822T061618.861 GMT
pyWorkPage (chat-ChatBotWork-Collab	pxCreateOperator
wrnSystemSetting (Data-Admin-System-S	chandrankanth@rulesstack.com
Data Pages	pxCreateOrgName
Linked Property Pages	Chandra Kanth
System Pages	pxCreateOrgUnit
	Unit
	pxCreateSystemID
	pega
	pxCumulativeQuestionScore
	0
	pxCurrentStage
	PRIMO
	pxCurrentStageLabel
	Collect Details
	pxCurrentStageSubscript
	PRIMO_1
	pxExternalSystemUpdateCount
	0
	pxInName
	C-2010
	pxLockHandle
	CHAT-CHATBOT-WORK C-2010
	pxObjClass
	Chat-ChatBot-Work-CollectDetails
	pxSaveDateTime
	20230822T061944.373 GMT
	pxSurveyScore
	0
	pxUpdateCounter
	4
	pxUpdateDateTime
	20230822T061944.373 GMT
	pxUpdateOperator
	chandrankanth@rulesstack.com
	pxUpdateOrgName
	Chandra Kanth
	pxUpdateOrgUnit
	Unit
	pxUpdateSystemID
	pega

Activate Window  
Go to Settings to act

Details we entered are in pyWorkPage in clipboard.

## Some extracurricular things on Chatbot.

Now instead of having a Questions in the Case type I have configured a section and added few properties in that section.

The screenshot shows the Pega DEV Studio interface. The left sidebar has 'Case types' selected. In the center, a modal window titled 'Edit case type: Chat Bot' is open under the 'Fields' tab. It lists four fields: 'Chat Name' (Text (single line), Optional), 'Your Age' (Integer, Optional), 'Your Phone Number' (Text (single line), Optional), and 'Your Address' (Text (single line), Optional). A '+ Add field' button is at the bottom. At the bottom right of the modal is a 'Submit' button. The status bar at the bottom of the screen shows 'Activate Windows' and 'Go to Settings to activate Windows.'

Added the case type to the same Legacy Webchat

The screenshot shows the Pega APP STUDIO interface. The left sidebar has 'Channels' selected. The main area shows the 'Legacy Webchat interface: Capture Details' configuration page. It includes sections for 'Configuration', 'Behavior', 'Connection', 'Training data', and 'Mashup'. Under 'Content', there are two tables: one for 'Create case command' and one for 'Response command'. The 'Create case command' table shows 'Collect Details' and 'Chat' as case types. The 'Response command' table shows responses for 'greeting', 'goodbye', 'help', 'thanks', and 'cancel'. On the right side, there is a 'Preview console' window showing a message 'Welcome to a Rulesstack Chatbot'. The status bar at the bottom shows 'Activate Windows' and 'Go to Settings to activate Windows.'

Now entering "chat" in the preview console. Chat is a keyword for the case type.

This channel interface is only available for the preview console.  
Template operator is not selected in the channel configuration

Text analytics repository points to a temporary directory and can result in data loss. Update repository in Prediction Studio. [Change repository](#)

Configuration Behavior Connection Training data Mashup

Response command Flow name Authentication

No items + Add conversation

Content

Create case command	Case type	Authentication
Collect Details	Collect Details	[Edit]
Chat	Chat Bot	[Edit]

+ Add case type

Response command Response type Authentication

greeting	Text	[Edit]
goodbye	Text	[Edit]
help	Text	[Edit]
thanks	Text	[Edit]
cancel	Cancel	[Edit]

+ Add response

Preview console

Show analysis Show header Reset

6:03 AM Welcome to a Rulesstack Chatbot

chat Activate Windows  
Go to Settings to activate Windows.

This channel interface is only available for the preview console.  
Template operator is not selected in the channel configuration

Text analytics repository points to a temporary directory and can result in data loss. Update repository in Prediction Studio. [Change repository](#)

Configuration Behavior Connection Training data Mashup

Response command Flow name Authentication

No items + Add conversation

Content

Create case command	Case type	Authentication
Collect Details	Collect Details	[Edit]
Chat	Chat Bot	[Edit]

+ Add case type

Response command Response type Authentication

greeting	Text	[Edit]
goodbye	Text	[Edit]
help	Text	[Edit]
thanks	Text	[Edit]
cancel	Cancel	[Edit]

+ Add response

Preview console

Show analysis Show header Reset

6:03 AM Welcome to a Rulesstack Chatbot

6:05 AM chat #Chat

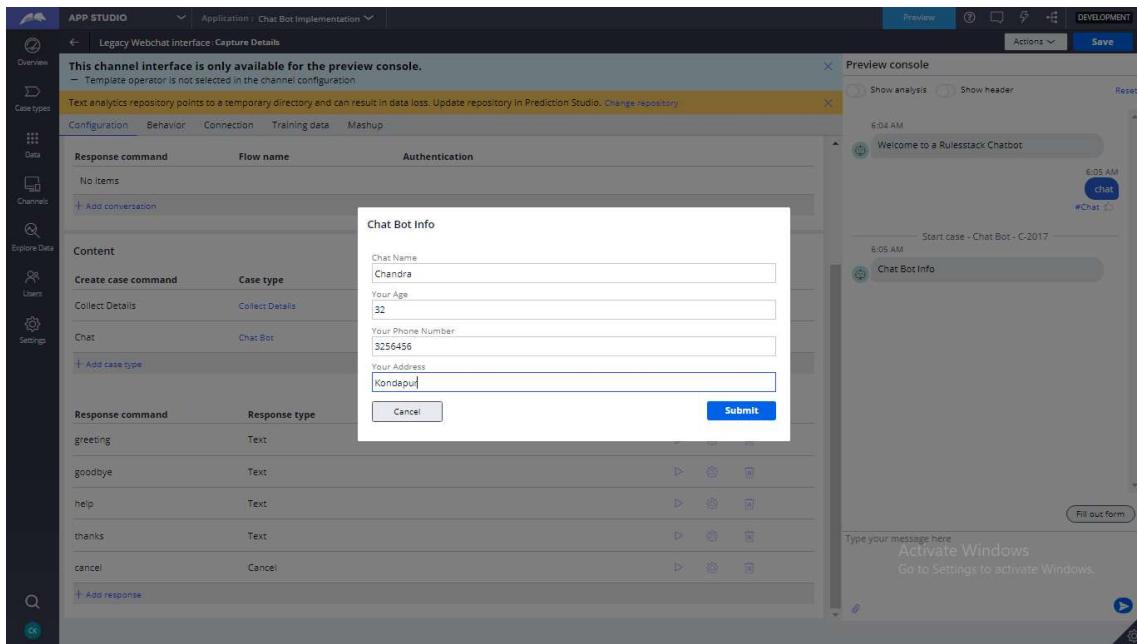
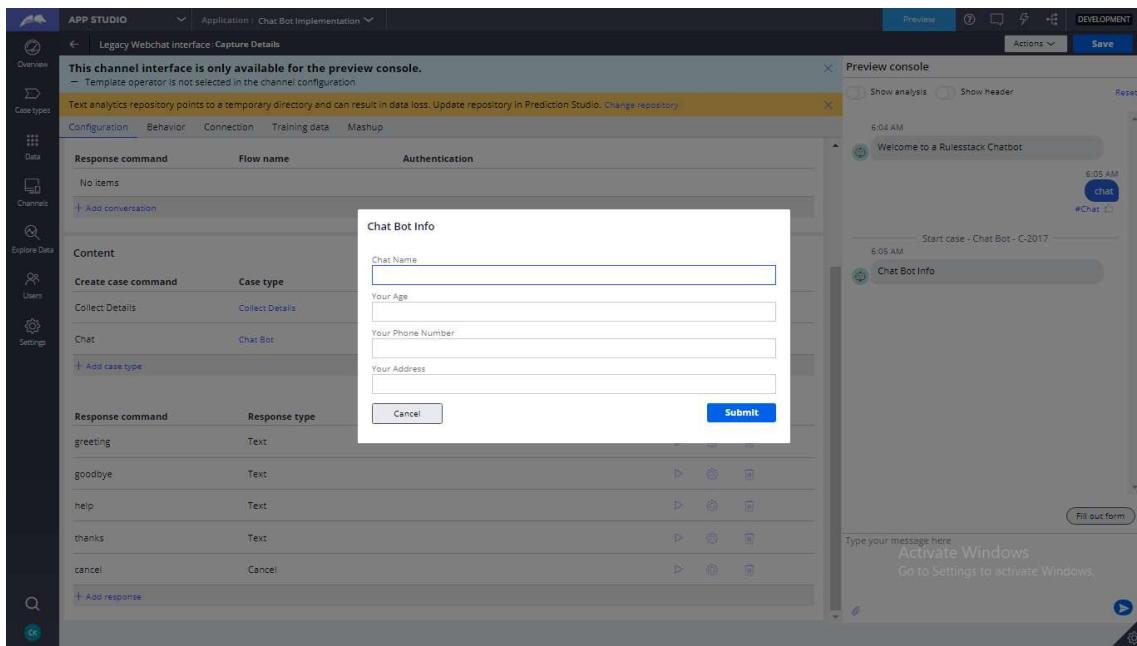
Start case - Chat Bot - C-2017

6:05 AM Chat Bot Info

Type your message here  
Activate Windows  
Go to Settings to activate Windows.

Since we created section Chatbot is asking to fill out form.

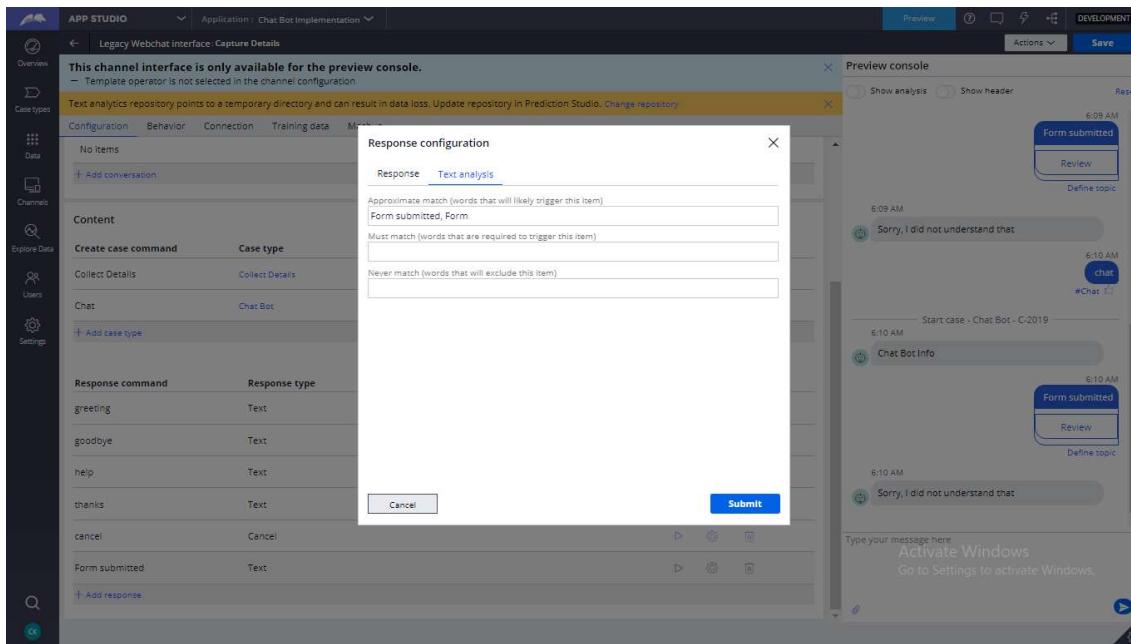
Click on Fill out form.



After submission of form, we are getting message "Sorry, I did not understand that."

So added response command.

Added text analysis.



--- Thank You ---