

Canary - AI Chatbot

by Yellow Messenger

User Guide 1.0

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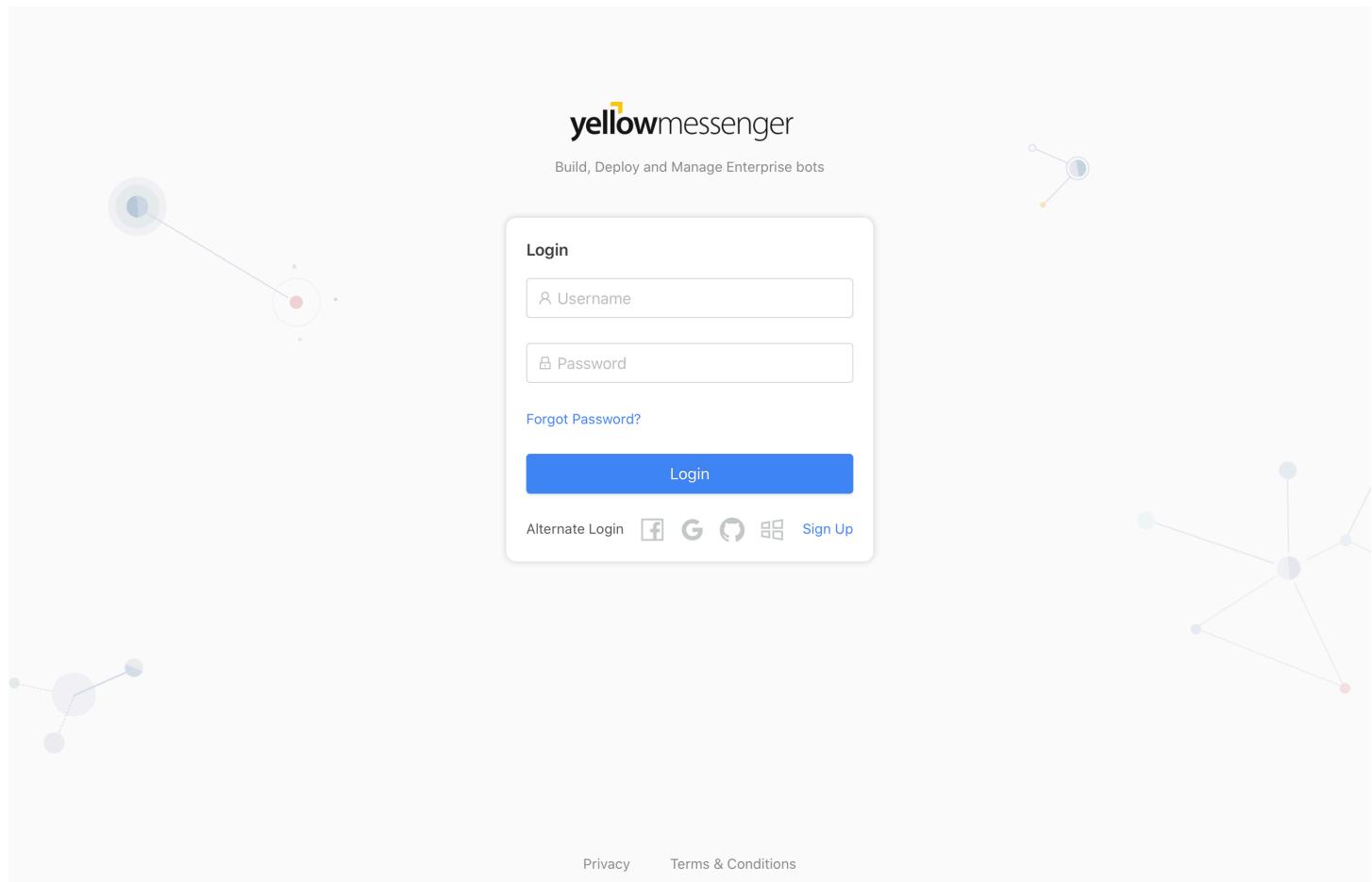
About Canary

Canary is a conversational AI Chatbot that helps you sell your products and services over messaging channels such as Facebook Messenger and WhatsApp. Elevate your brand experience with direct engagement by automating sales and after-sales customer support. Canary is easy to setup and can be used as a Progressive Web App or by installing the plug-in on your browser.

Features:

1. Suggest products by replicating your best salesperson.
2. Personalise shopping experience based on user persona and preferences.
3. Enable shopping experience based on the user demographics.
4. Send notifications and updates to user-preferred channels (Facebook Messenger and WhatsApp).
5. Re-engage with your customers and help them re-claim their abandoned cart.
6. Enable live-chat option for customer grievance and bulk quotations.
7. Understand customer satisfaction by automated surveys.
8. Self-learning loop to enhance the intelligence.
9. Gather customer insights and keep improving the experience.
10. Easy setup - available as a Progressive Web App (PWA) and Website Plug-in.

Sign Up and Login



Once the Canary app is installed from Shopify, complete the Sign Up process by following the steps mentioned below:

Steps for Signing up and Logging in to Yellow Messenger Dashboard:

1. Visit the URL - app.yellowmessenger.com
2. Enter the Email address, set a Password and provide Full name. Click on **Sign Up**. Also, Social accounts such as Google account can be used for signing up.
3. Enter the registered Username and Password and, Click on **Login**.

Homepage

yellow messenger

Projects Marketplace



Staging

Search projects

Create a project

Environments

Production

Staging

Sandbox

Learning & Resources

Guides & Tutorials

API Reference

Help Center



Canary for Shopify

Where to find the Chatbot?

Yellow Messenger Dashboard consists of Homepage with all the necessary features and options to setup, configure and manage the AI Chatbot. It consists of three environments:

1. **Sandbox:** Chatbots under development and testing will be in sandbox.
2. **Staging:** Chatbots that are connected to the Business' backend systems will be in staging.
3. **Production:** Like chatbots across all channels will be in production.

API Management

The screenshot shows the Canary platform's API Management interface. On the left, there's a sidebar with various developer tools like Cloud functions, Localization, Database, and API Management. The API Management tab is selected. Below it, a 'Manage Environments' modal is open, displaying a grid of environment keys across three columns: Sandbox, Staging, and Production. Each column has four rows corresponding to different keys. The first row contains 'X-Shopify-Acc...', 'shppa_0e850f5534291d...', 'shppa_0e850f5534291d...', and 'shppa_0e850f5534291d...'. The second row contains 'shopifyShopNan...', 'yellowbitonic', 'yellowbitonic', and 'yellowbitonic'. The third row contains 'shopifyAccessTc...', 'shppa_0e850f5534291d...', 'shppa_0e850f5534291d...', and 'shppa_0e850f5534291d...'. The fourth row contains 'Key', 'sandbox', 'staging', and 'production'. At the bottom of the modal, there are buttons for '+ Add Key', '+ Add new row', and 'Save'. The background of the main interface shows a list of API endpoints such as 'GetProductDetailsBySe...', ' GetUserDetails', 'getOrderStatusUsingId', 'latlongToAddress', 'GetProductDetails', 'pincodeTolatlong', 'updateOrder', 'cancelOrder', 'GetgetProdByCatAndS...', 'AddUserDetails', and 'GetProductDetailsUsin...'. A green circular icon with a white 'S' logo is visible in the bottom right corner.

Key	Sandbox	Staging	Production
X-Shopify-Acc...	shppa_0e850f5534291d...	shppa_0e850f5534291d...	shppa_0e850f5534291d...
shopifyShopNan...	yellowbitonic	yellowbitonic	yellowbitonic
shopifyAccessTc...	shppa_0e850f5534291d...	shppa_0e850f5534291d...	shppa_0e850f5534291d...
Key	sandbox	staging	production

How to connect your Shopify account with Canary?

Goto API Management section under Developer option to Connect your Shopify account with Canary. Enter the secret key and **Click on Save** to preserve the settings.

Configuration - General

Configuration

General Access Control Channels Integrations Publish to Marketplace

General settings

Name: Canary for Shopify

Title: Canary

Description: One Stop Shopping Assistant

Intro Message: Intro Message

Domain for web-plugin test: Domain name without http and slashes

Email addresses for reports: Comma separated emails

Bot unpause terms: Terms

Timezone:

Email signature: Signature

Bot Icon



STAGING

How to customise the Look and Feel of your Chatbot to match your website theme?

Goto General settings under Configuration to customise general settings of the Chatbot such as Name, Title, Description and more.

Configuration - Channels

Configuration

General Access Control **Channels** Integrations Publish to Marketplace

Channels / All

 Chat widget Customize your own chat widget and place on your website to be in touch with your customers.	 WhatsApp Enable Yellow Messenger chat bots on the World's largest chat platform and be connected to your customers.	 Facebook Connect your bot with your Facebook Fanpages to automate your chat with customers.	 Facebook Comment Connect your bot with your Facebook Fanpages to automate your chat with customers on post comments
 Google Assistant Connect your created journeys with your Google project to use Natural Language Processing as you want it.	 Alexa Leverage Alexa's voice capability using the NLP trained bots provided by Yellow Messenger and skip the...	 Android Use the SDK provided by Yellow Messenger to continue serving your customers.	 Email Now, use the NLP bots provided by us to help you serve the customers better by automatic most of replies.
 Skype You can build a conversational bot for Skype using Yellow Messenger bot using a few simple steps.	 Slack Build a conversational bot for your Slack account. Create a custom bot for your own team to speed up...	 Microsoft Team Build a conversational bot for your team. Create a custom bot to speed up teamwork in few steps.	 Skype for business Build a conversational bot for Skype Business account. Create a custom bot for your own team.

Channels: Canary comes with option to connect various Social changed such as Facebook Messenger, WhatsApp, Slack and more.

Goto Chat Widget for further customisation off your Chatbot.

Configuration - Channels

The screenshot shows the 'Configuration - Channels' section of the Yellow Messenger platform. On the left, there's a sidebar with icons for Configuration, General, Access Control, Channels (which is selected), Integrations, and Publish to Marketplace. Below this is a 'STAGING' environment indicator. The main area has tabs for Appearance and settings, Basic, Advance, General, Publish your bot, Widget, Banner, and Bot Icon. A 'Save your setting' button is also present. On the right, a preview window shows a yellow-themed chat widget for 'Canary for Shopify One Stop Shopping Assistant'. It includes sections for 'This message is from the bot.', 'Option', 'Option', and a 'User message' input field. At the bottom of the preview are buttons for 'Type your message...', a microphone icon, and a user profile icon.

Chat widget consists of options to customise the Chatbot appearance.

Basic: Consists of option to customise the Title, User bubble, Bot bubble and more.

Advance: Consists of Options to customise button, padding, card and more.

General: Used to configure General settings such as enabling auto-complete, optimising for mobile devices and feedback related options.

Widget: Provides option to customise the Banner.

Banner: Provides option to customise the Banner.

Bot Icon: Provides option to customise Bot Icon.

Journeys

The screenshot shows the 'Journeys' section of the Yellow Messenger platform. On the left, there's a sidebar with various icons and categories: 'order', 'new user', 'Default Category', and 'Customer Service' (which is selected and highlighted in blue). The main content area is titled 'Customer Service' and contains four journey cards:

- Payment Related Issue**: Description: 'Payment Related Issue'. Status: '... 1 response configured'. Actions: Delete | Copy link.
- Past Order**: Description: 'Issue related to a past order'. Status: '... 1 response configured'. Actions: Delete | Copy link.
- My Order**: Description: 'I have an issue with my order'. Status: '... 1 response configured'. Actions: Delete | Copy link.
- Customer Service**: Description: 'Customer Service'. Status: '... 1 response configured'. Actions: Delete | Copy link.

A search bar at the top says 'Type what user says to create a new journey ...'. There are also tabs for 'Intelligence', 'Entities', 'Context management', 'Learning', and 'Monitor'. At the bottom right, there's a green circular icon with a white 'S'.

How to customise the Chatbot Responses as per the requirements?

Goto Journeys section under Intelligence. Journey is a path that accomplishes some task/goal and defines the flow of chatbot's conversation. Below are a few examples:

Customer Service: This journey defines the conversation flow on how to handle customer queries related to payment, past orders and more.

Order: This journey defines the conversation flow on how to accept/cancel orders, provide order status and more.

Journeys

The screenshot shows the Yellow Messenger Journeys interface. On the left, there's a sidebar with various icons and a "STAGING" section. The main area displays a conversation flow with nodes: "START TRIGGERS" (blue rounded rectangle), "ask feedback" (light blue rounded rectangle), "ask suggestion" (light blue rounded rectangle), and "FINAL RESPONSE" (green rounded rectangle). To the right, a "User Expressions" panel titled "Evaluate" lists four entries:

User Expression	Action
What user says ..	
how to rate my order experince	Delete
share your feedback	Delete
feedback	Delete
i want to share feedback	Delete

Below the expressions is a "Start step:" dropdown set to "choose". Navigation arrows and a page number "1" are at the bottom of the panel.

Is there a way to improve Bot responses?

Yes! Goto any one of the journeys and enter more ways on how a customer can get help. This increases the Chatbot's ability to handle customer queries submitted in multiple ways.

Feedback: This journey defines the the conversation flow on how to collect customer feedback.

Localization

The screenshot shows the 'Localization' tab selected in the top navigation bar of a developer interface. On the left, there's a sidebar with icons for Developer, Cloud functions, Database, API Management, Stash, Tools, Logs, and a 'STAGING' button. The main area is titled 'Messages' and contains instructions for externalizing bot responses through code. A code snippet is provided:

```
app.renderMessage('code-goes-here', {}, 'default message')
```

Below this, there's a form with fields for 'Code (without spaces and special characters, _ and - are allowed)', 'Message', and 'Add message'. A 'Save settings' button is at the bottom of this section.

The main content area lists several message templates with their corresponding responses:

- qr-backtoproduct-subcategory:
Back to sub-category
- showOrderStatus-1:
Your order status ↗
- showOrdersVldtr:
🤔 I think you have entered a wrong orderID. Have you?
- showOrdersPrompt-3:
👉 Here are your last five orders, you can choose any order below to know the status or you can type your order ID
- showOrdersPrompt-2:
It seems like you never made any order! 😊 Do you want to try with other number
- showOrdersPrompt:
Oh no! 😞 I am not able to show the status of your order now! Do you want to try with other number
- order-status-init:
⚠️ Hey, I think you aren't logged in. Let's do it

A green circular icon with a white 'S' is visible on the right side of the message list.

Is there a way to change Bot responses?

Yes! Bot responses can be completely customise as per requirements.

Goto Localization section under Developer option. Configured the responses as required.

Database

The screenshot shows the Canary Platform's Database section. The top navigation bar includes links for Developer, Cloud functions, Localization, Database (which is selected), API Management, Stash, Tools, and Logs. On the left, there's a sidebar with icons for various features like Analytics, Localization, and Dev Tools, with 'STAGING' written vertically. The main area displays a table titled 'product_catalogue'. The columns are: product_id, product_type, title, variants_id, variants_title, price, sku, option1, and opt. The table contains 14 rows of data, with the first few rows visible. A footer at the bottom indicates 'Showing from 1 to 14 out of 999 records' and a page navigation bar with buttons for 1, 2, 3, 4, 5, ..., 72, and 'Go to'.

product_id	product_type	title	variants_id	variants_title	price	sku	option1	opt
4475726921795	women's coats & jackets	Zola Coat in Black	31755690475587	Black / X-Large	498.00	17361	Black	X-L
447573590C		Zoulou Coat in Black	31755734614083	Black / Medium	528.00	19274	Black	Med
4475765751		Zipper Jacket	31755876728899	X-Large / Olive	788.00	21719	X-Large	Oliv
4475768143		Zepo Brushed Cotton Blazer	31755882758211	X Large / Anchovy	439.60	21855	X Large	Anc
4475756052		Zip Back Circle Blouse in Black	31755823120451	46 / Black	369.60	21185	46	Blac
4475768372		Zepo Brushed Cotton Blazer	31755883315267	X Large / Phantom	439.60	21859	X Large	Pha
4475788230723	women's dresses	Zipper Dress	31755952422979	46 / Black	313.60	30981	46	Blac
4475767980099	men's coats & jackets	Zepo Blazer	31755882397763	X Large / Black	467.60	21847	X Large	Blac
4475810545731	women's shoes	Zepella Sandal	31756066062403	41 / Blue	418.60	40610	41	Blu
4475736293443	men's coats & jackets	Zig Coat in Evening	31755736055875	Evening / XX-Large	388.00	19289	Evening	XX-
4475765522499	men's coats & jackets	Zipper Jacket	31755876139075	X-Large / Black	788.00	21707	X-Large	Blac
4475768635459	men's t-shirts	Yank Crewneck Tee	31755884167235	XX Large / Black	148.00	21875	XX Large	Blac
4475768832067	men's t-shirts	Yank Crewneck Tee	31755884691523	XX Large / Phantom	148.00	21879	XX Large	Pha
4475745402947	women's shoes	Wrap Sandal in Black/Steel	31755776458819	41 / Black/Steel	537.60	20356	41	Blac

How to go through User data accumulated by the Chatbot?

Canary gathers and stores all the data shared by the customer so that it can be analyzed and acted upon.

Goto Database section under Developer option for accessing the data gathered from the conversations with includes some of the examples mentioned below:

user_db: Contains user data such as name, email ID, address and more.

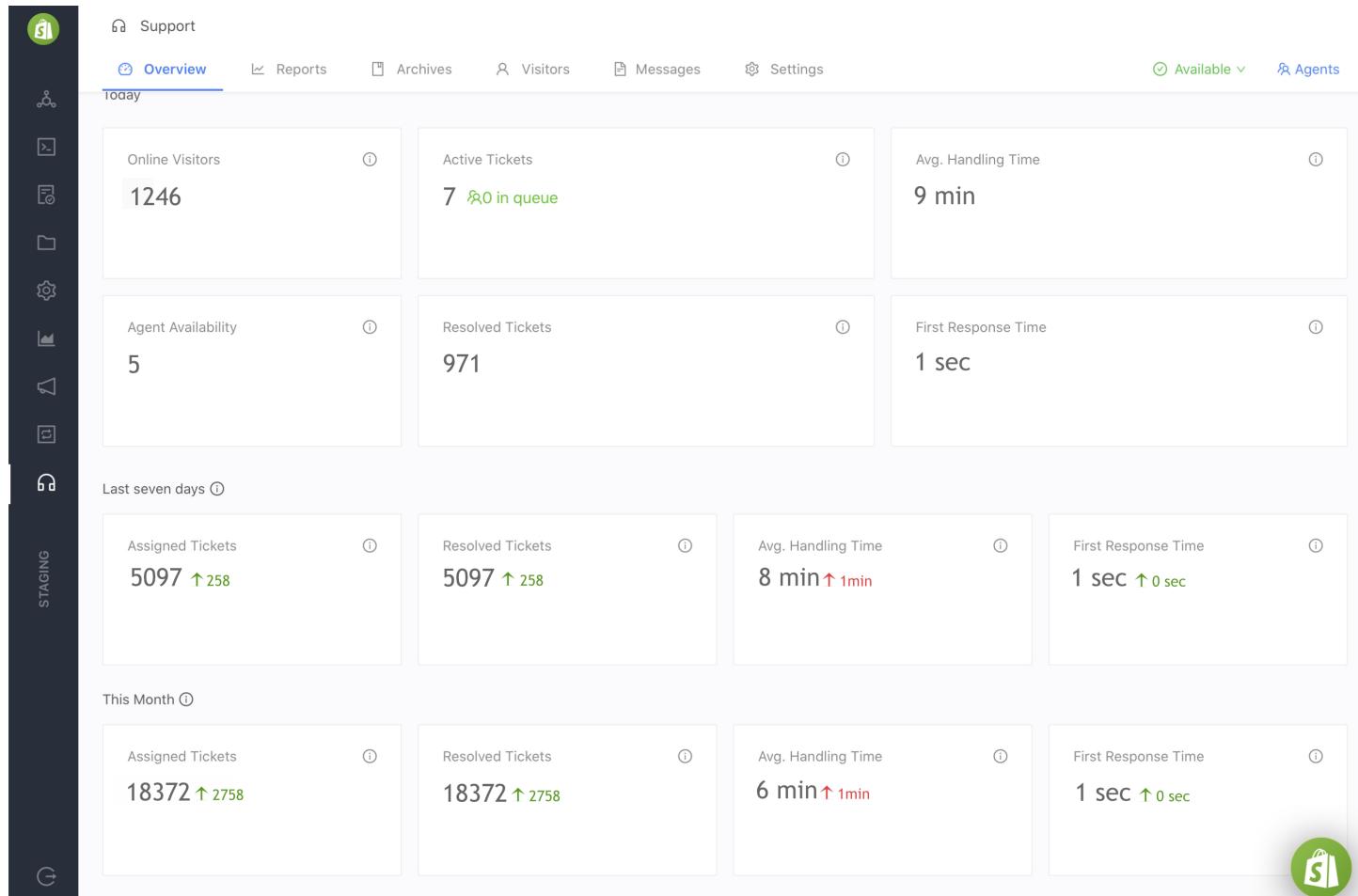
store_managers: Contains Store Manager data such as name, email ID, employee ID and more.

order_details: Contains order data such as Order ID, purchased products, order amount and more.

product_catalogue: Contains Product data such as product ID, type, price, SKU and more.

feedback: Contains feedback data such as grievance type, subtype, customer ratings and more.

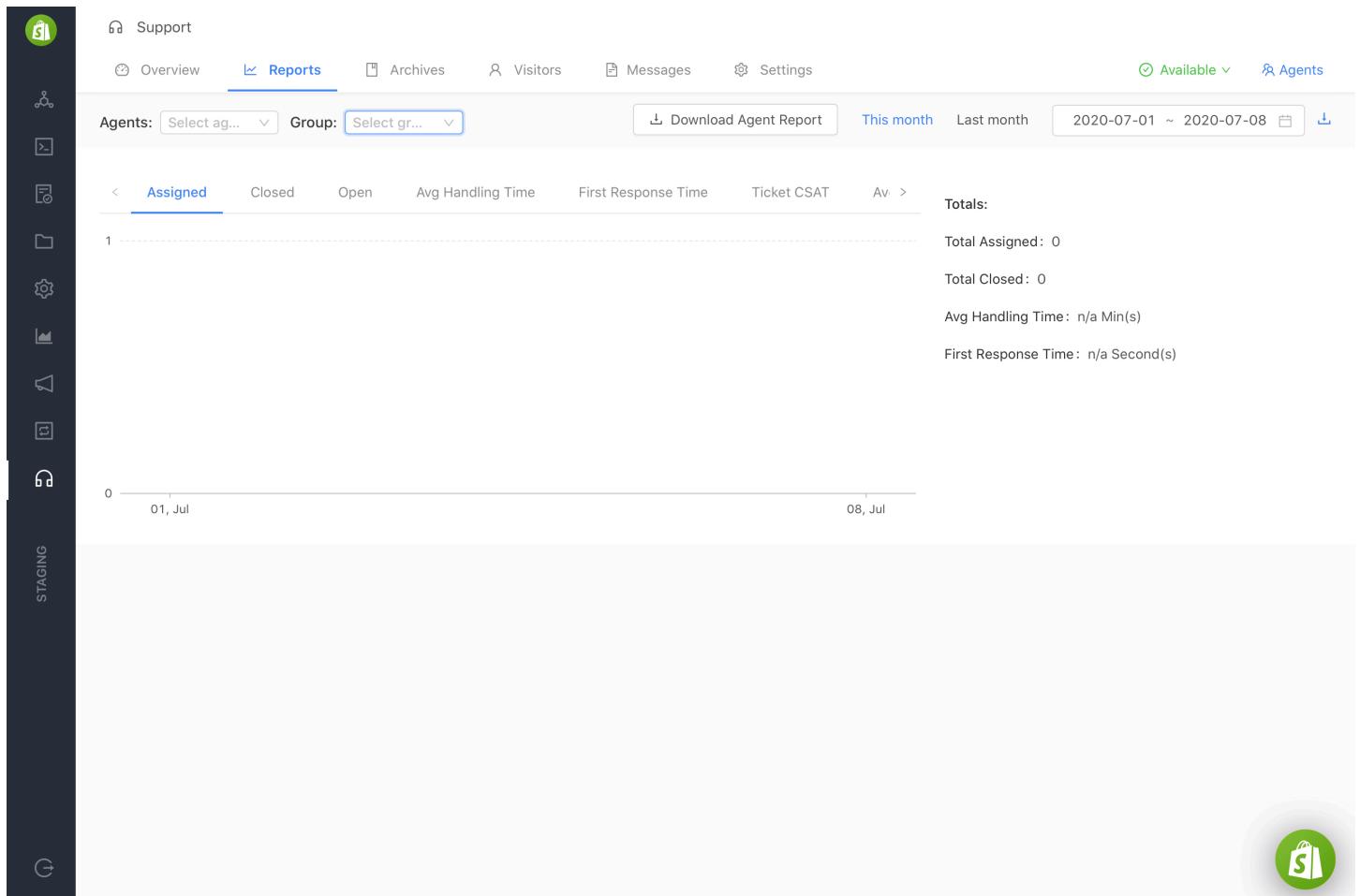
Support - Overview



How to get an Overview of your Bot's performance?

Goto Overview section under Support options. This provides a glimpse at the overall support performance which includes the number of customers who visited the platform, agent's availability, first response time, average handling time of tickets and, total number of active & resolved tickets. Overview is bifurcated into Today (Current day), Last Seven days and for the given Month.

Support - Reports



How to access Agent-wise Reports?

Goto Reports section for a more detailed information about all the tickets. These can be filtered by Agent, Group and Date. It can also be exported to CSV file.

Assigned: Total tickets assigned to agent(s).

Closed: Total tickets closed.

Open: Total tickets in Open state.

Average Handling Time: Average time spent in handling the tickets.

First Response Time: Average time taken to provide the first response to the customer query.

Ticket CSAT: Provides the average customer satisfaction rating.

Support - Messages

The screenshot shows the Yellow Messenger platform's support interface. On the left, there's a sidebar with various icons and the word "STAGING". The main area has a header with "Support", "Overview", "Reports", "Archives", "Visitors", "Messages" (which is selected), and "Settings". To the right of the header are buttons for "Available", "Agents", "Bot status: Running", "Transcript: Download", and "Chat URL (Public): Copy".

The main content area shows a message thread between a user and a bot. The user asks for the One-Time Password (OTP) received on their phone. The bot responds with a friendly greeting and offers assistance with placing orders. It provides links to browse products, check order status, cancel orders, and contact customer service. The conversation is timestamped at Jul 7, 7:05 PM and 8:02 AM.

On the right side of the message thread, there's a "DEVICE DETAILS" section showing the browser (Safari), OS (OS X), platform (Apple Mac), and device type (Desktop). Below that is a "USER ACTIVITY" section listing multiple URLs visited by the bot, each preceded by a blue checkmark.

Is there a way to go through Customer conversations?

Absolutely! Goto Messages section under Support options to have a look at the customer conversations with the bot/agent(s).

Account - Overview

The screenshot shows the 'Account - Overview' section of the Yellow Messenger dashboard. At the top, there's a navigation bar with the 'yellow messenger' logo, 'Projects', and 'Marketplace' links. On the left, a sidebar titled 'Account' has 'Overview' selected (highlighted in blue). Other options include 'Invites & Approvals', 'Activity', 'Subscriptions', and 'New subscription'. The main area is titled 'Overview' and displays a circular profile picture with a pixelated 'H' logo. To the right of the picture, the name 'Akshay Bhat' and email 'akshay@yellowmessenger.com' are shown. A vertical dropdown menu on the right side of the header includes 'Akshay Bhat', 'Switch subscription', 'Account Settings', and 'Logout'. Below the profile picture, there's a 'Change Password' section with fields for 'Current Password' and 'New Password', and a 'Submit' button. Further down, there's a 'Two Factor Authentication' section with a 'Disabled' button. At the bottom, there's an 'Access keys' section showing an API Key: 'd93eb048c6def94687698ad33f3c23f28e2c4256f0bd93f7f9be360bbb5283e4' with a copy icon.

Account Overview provides options to Change Password of Canary Account and enabling Two Factor authentication for increased security. It also provides information such as last login information and active sessions.

Steps for logging out from Yellow Messenger Dashboard:

1. Tap on Profile Icon.
2. Click on **Logout**.