MOONSHOT

DASHBOARD MANUAL

TABLE OF CONTENTS

1. Login

Once you have been added as users to the dashboard, you should have received an email to register/ activate your account. Please click on the link and follow the instructions. To add your number, you will have to select South Africa. Once you have logged in, you will click on the 'Shared' button to be able to access the message portal.
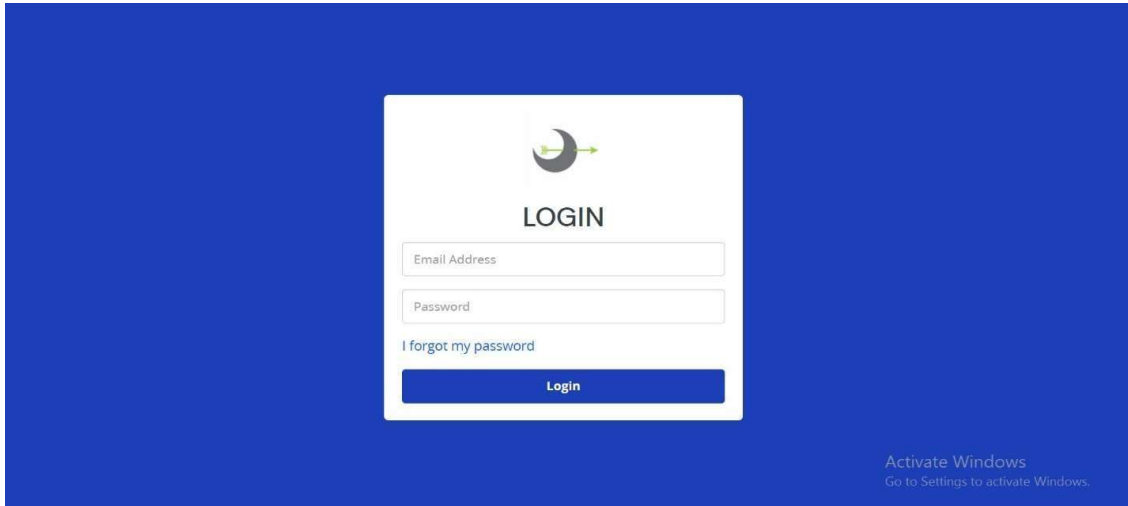

2. The Menu

The menu from the left side of the page is the first thing you should know about. It is designed in a vertical format and does not require much technical expertise to understand. Let's see what the menu comprises of:

2.1 Chatbot AI

When you click here you see "Story", "Media Blocks", "Datastore", "Conversational Forms" "Chatbot Training" and "Common User Questions". Let's have a look at each one of these, respectively.
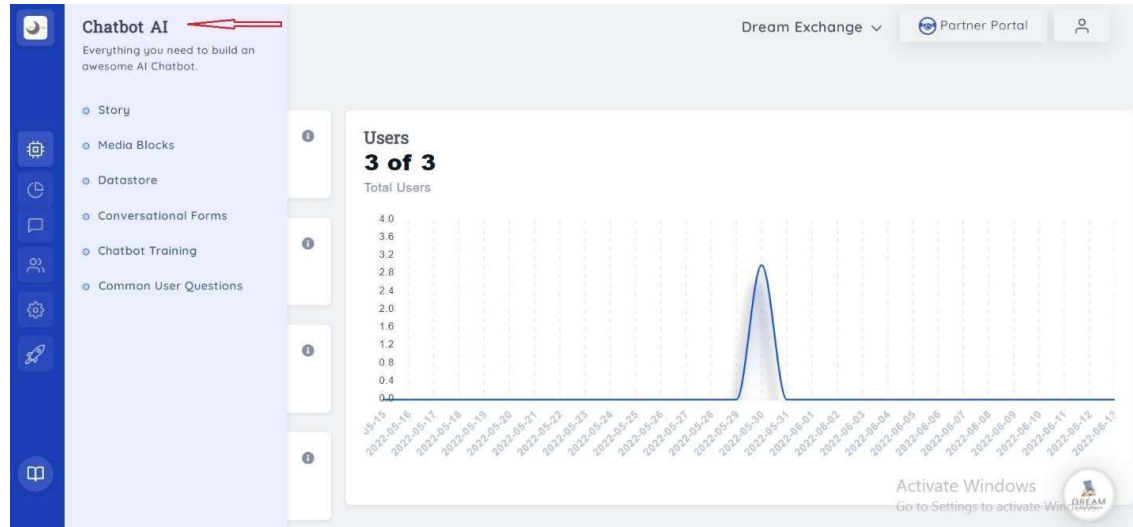
2.1.1 Story

This page allows you to create a story or multiple stories for your chatbot. A story can be comprised of user responses or suggestions from the chatbot as per your liking. You can make it as precise and detailed as you want!

2.1.2 Media Blocks

Media Blocks are graphical messages, such as Image, Audio, File, Video, an Image Slider with some call to action, or Text message with some call to action. The easy design helps you to create media blocks without any learning. 2.1.3

Datastore

With the help of it, you can group your keywords, make dynamic variables, and also define user attributes.

2.1.4 Conversational Forms

This page allows you to create and manage forms for your chatbot which can be added to an ongoing story. For instance, you want to get a customer's contact information within the conversation, you can simply add a customized form in your story and store it for later use.

2.1.5 Chatbot Training

This section will help you teach your chatbot new queries from the users asked questions over time. Each time your user asks a question which the bot fails to answer, the query starts appearing in the "Chatbot Training" section. In this section, you tell if the query/question which your chatbot failed to understand is a form of an already presented query or entity? Or is it a story. If it's a story you go ahead and create a one and if it's an alternative form/phrase of another query/question. You just teach your chatbot without creating a story every time.

2.1.6 Common User Question

Here in this section, your agent can learn how to support common user questions without any extra development. By default, it will respond with predefined phrases.

The chatbot AI option is mainly for creating stories, media blocks, forms and editing conversation flows.

2.2 Analytics

Here you can view analytics on a daily, monthly, and overall basis of the performance. The high-level stats help you understand how your chatbot is performing. Also, when you click "Analytics" it will show numbers of options like general statistics, platform specific users, conversation report, platform report, and more. You can see the image for further assistance.
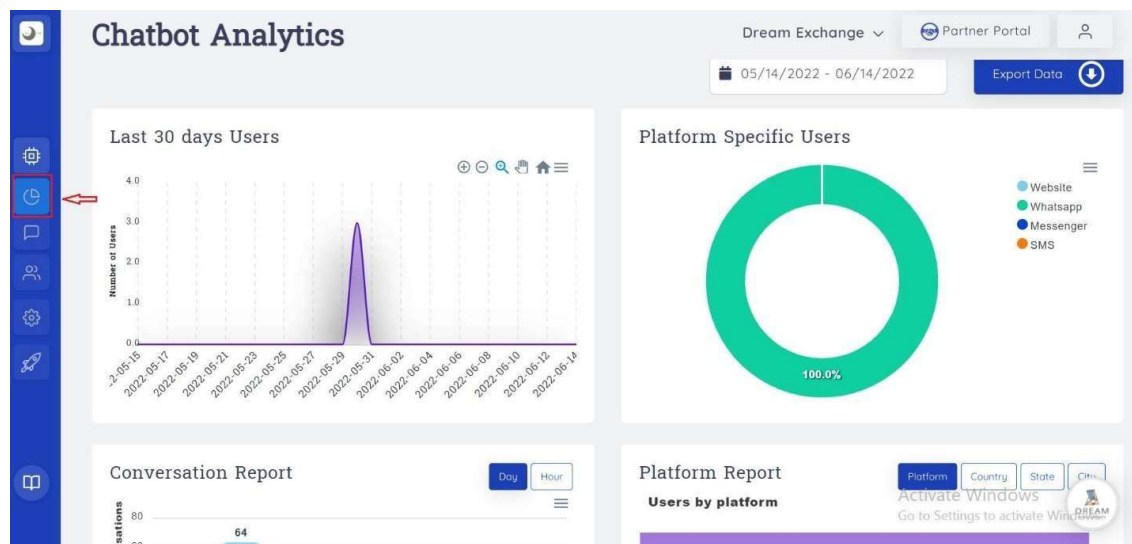
2.2.1 General Statistics

It shows the statistics of your chatbot. Which mainly includes messages responded to by bots, customers' hours saved, and more.

2.2.2 Platform specific users
This section is specially designed to calculate the statistics of human chat and bot chats. However, there is monthly analytics of the human vs bot chats.
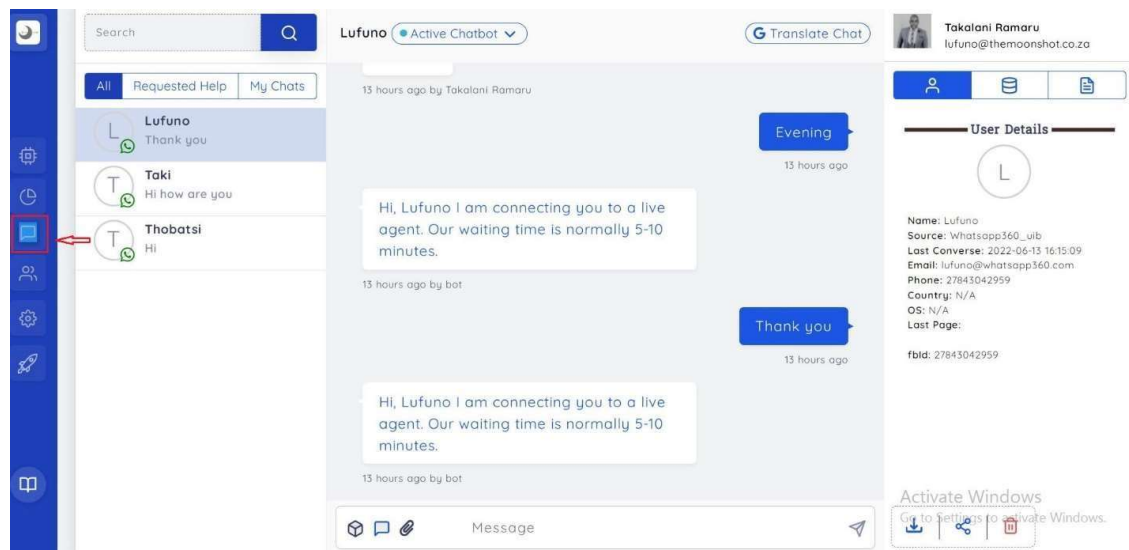
2.2.3 Conversation Report

It calculates the stats of the messages, which mainly includes how many times the message has been sent or received.

Platform report

This section shows the platform utilized by the user to communicate with chatbot.

2.3 Live chat

Here you can view all the chats and interaction with various users. You can see questions asked by a user and the responses your bot did/didn't give. An agent is also able to respond and send messages to users.

ICONS	EXPLANATION
All Requested Help My Chats	All user messages come through to the all user tab. Chats from Users needing human help will appear under requested help. The moment an agent response to a user and marks that chat as resolved, it will automatically move to the 'My Chats' tab
⬡	This Icon allows an agent to send an already saved story to a user. This can include canned responses. Canned responses are used to save agent time by saving frequently used phrases.
💬	When you want to type a message to a user, you can click this icon.
📎	When you want to attach a file , you click on this icon and it will allow you to attach any file type including pdf, audio, video, etc. provided the file is not larger than 5mb.
⬇	This Icon allows you to export conversations from the dashboard. It automatically saves the chat history in an excel format
⤳	This icon allows you to share the conversation with anyone via email.
🗑	This icon allows you to delete messages however certain users are unable to delete chats for security reasons.
☑	This icon allows you to mark chats as resolved once you are done assisting a user. This will automatically remove the chat from the 'Requested help' tab to the 'My Chat' tab.
👤+	This Icon allows you to assign chats to your colleagues or superiors. This can be used if a user has requested to speak with a superior and the chat requires to be escalated.
📄	This icon allows you to save notes under user profiles. You can type notes regarding a certain issue the user had so that whoever takes over the conversation can have a better context.

2.3.1 Message Broadcasting

When you hover your mouse over the space ship icon, various icons will show to allow you to choose your broadcast channel, which in this case, will be WhatsApp. Once clicked the below options will pop-up.


In order to send broadcast messages, they need to be approved by Facebook. Such messages are referred to as templates. So you need to create a template message which will be submitted to Facebook for review and once approved, you will be
able to broadcast that message to your users. Here is the process breakdown:

Click on WhatsApp Media blocks, then click on 'create WhatsApp Media block'.
You will then be presented with a page that has everything you need to create a template.
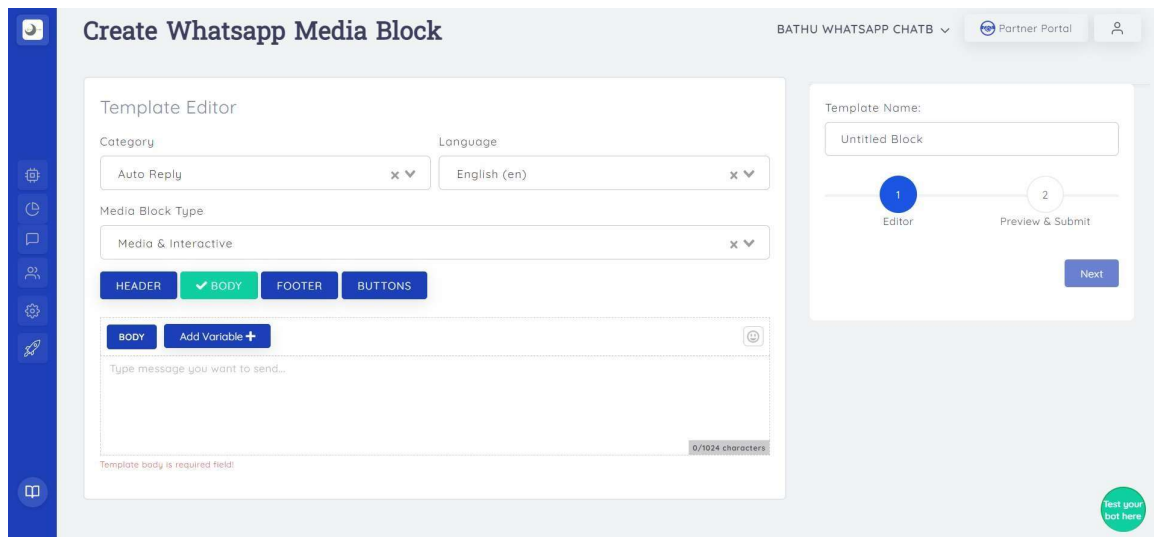
On this page, you can choose if your message will have a header, footer, buttons or whether it will include a text message, a video or a document.
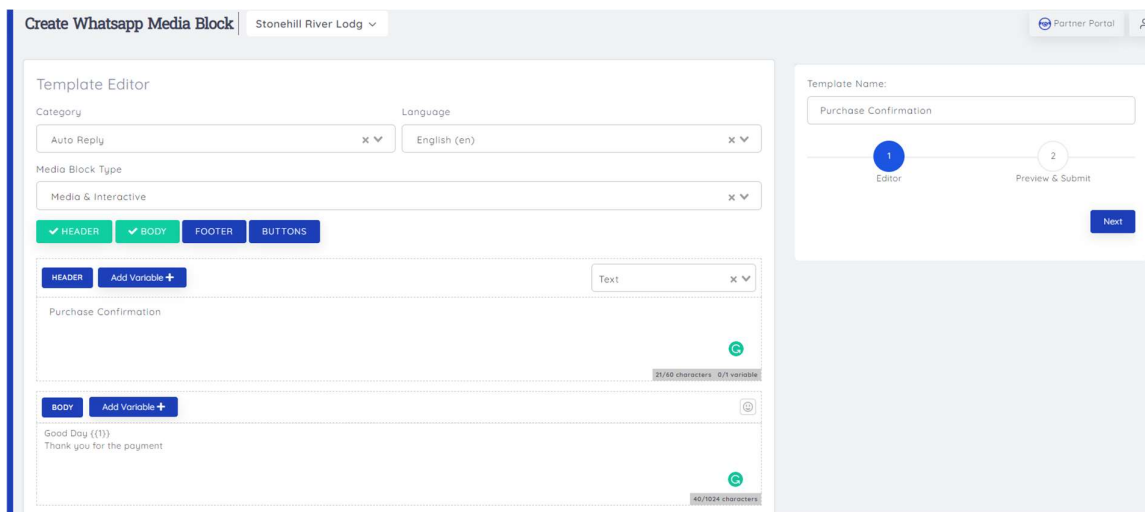
In the example above, we are sending a plain text message with a header. So we selected 'Header and Body'. I then Typed what my header will be and also named my template (Purchase Confirmation) on the right hand side. You then add text to the body message box. You can type whatever message you will be sending. You also need to click on 'add variable' to add whatever information will be interchangeable in the text such names, places, dates etc. To add a variable you just click on add a variable. It will place {{1}} at the end of the text, you will then need to cut it and paste it where you want the variable to be. E,g) 'Good Day {{1}}' cause you intend to have a name as the variable. Then click on next.
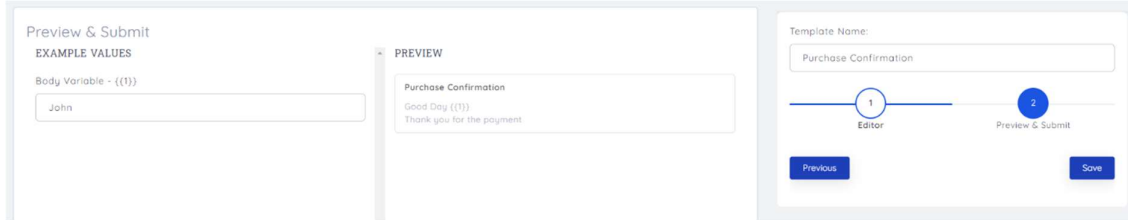
You then type what your variable will be and click save. It will then save your template message and automatically send it to Facebook for approval. Approval can take anything from few minutes to 24 hours. To check if it is approved, refresh your screen, click on the space ship, click on WhatsApp and then click on Media blocks. When your hover your mouse over the WhatsApp icon, it will display if your template has been approved. Green means approved and Red means rejected.
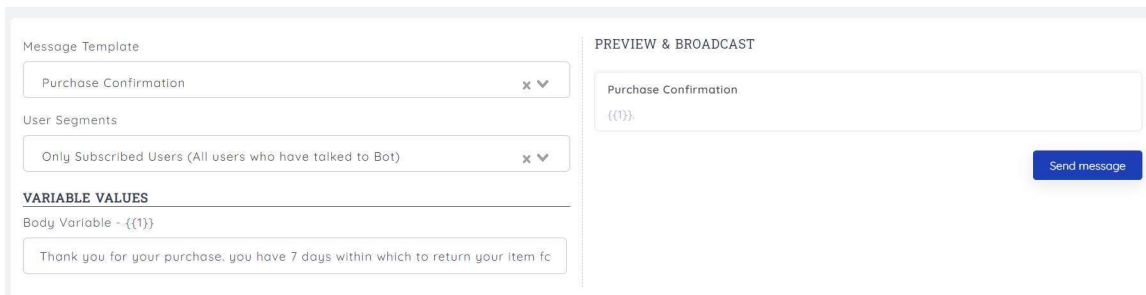
You will then go back and click on the spaceship, select WhatsApp and this time click on 'WhatsApp Broadcast'.

Once your template is approved it will appear under 'Select template' and then you choose the users you wish to send the message to or you can upload a database of users you want to send to. You can then type your body variable again and on the right hand side of the screen you will be able to preview the broadcast and then select 'send message' to broadcast it.

How to Create a template with an Image:
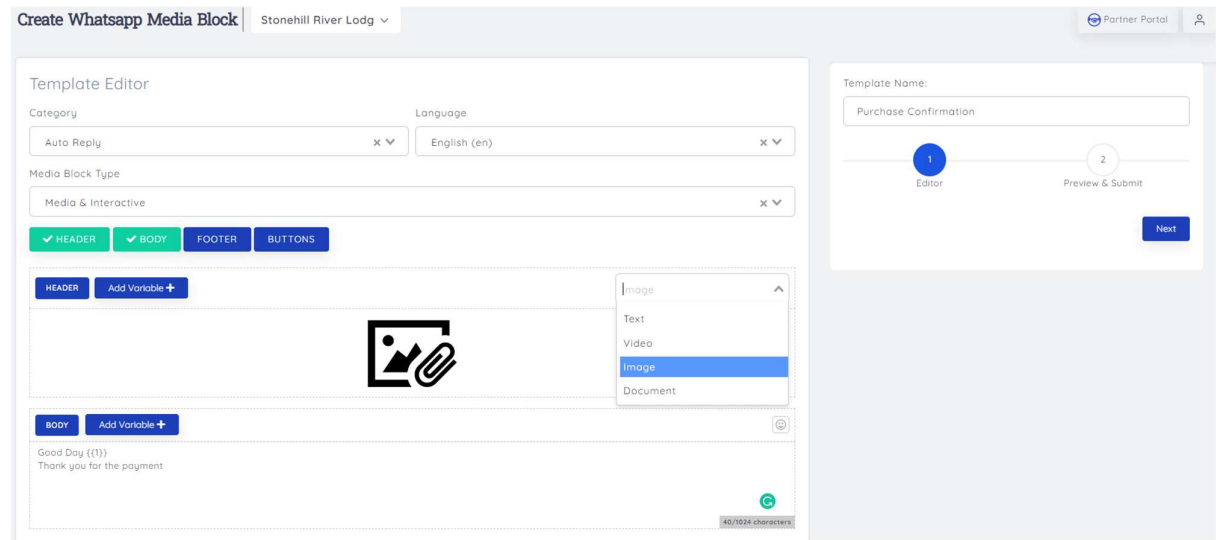
In order to add an image to your template, you have to add a heading and then under the drop-down menu, you have to select the media type you want to use which in this this case will be an image.

Under Body, you follow the exact steps as when you were setting up a text template. You will type your message and also include a Variable if the message requires one. Click on 'Next'
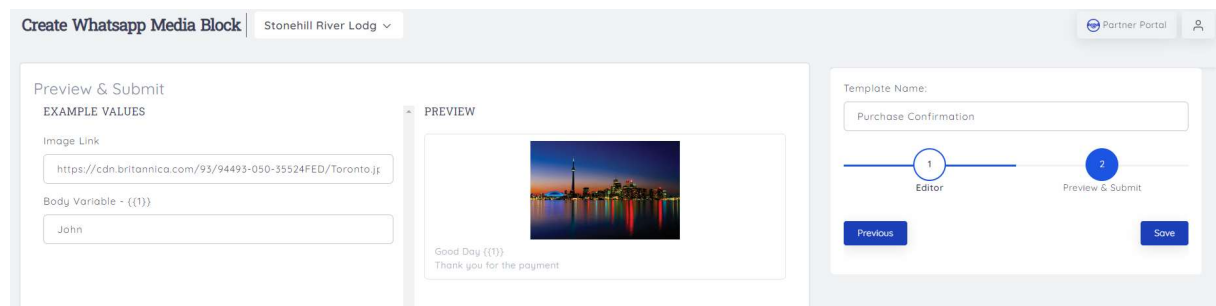
On the next page, you will use this link which will be your 'Image link' to get the template approved. Here is the link:

https://cdn.britannica.com/93/94493-050-35524FED/Toronto.jpg

Click on Save which will submit the Template. When you need to send the template, you will then attach the image you want to send to the actual message as per below image:

To add/ attach an image you have to click on the chain icon on the right side of the Image link title. This will enable you to select the exact image you want to send from your device. The preview on the right will show you how the message will look like.

How to send a broadcast using an Upload:

When you select 'Upload users file', you will then click on browse in order to select your file from your device.

N.B) The format of your excel sheet needs to have name and number only as per below example. Make sure the number includes '+27' area code and there's no spacing:

	A	B	C
1	Name	phone	
2	Lufuno	+27849043526	
3	Takalani Ramaru	+27725063259	
4	Julius Ceaser	+27836547889	
5			
6			
7			

Save the template as a CSV file (CSV Comma Delimited):
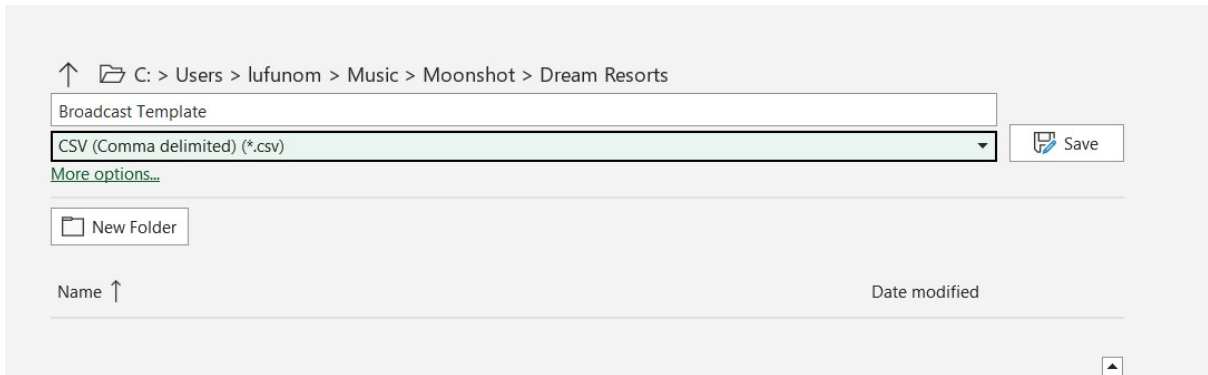
You will then be able to attach this file to your broadcast and to send it.

2.4 Users

This section contains "Bot Users" and "User Segmentation"

2.4.1 Bot Users

In bot users, you can view the list of people who have interacted with your chatbot at least once.

2.4.2 User Segmentation

It helps you create segments of users based on entities.

2.5 Settings

This tab allows you can manage everything related to your chatbot here. Such as; General Settings, Greeting Message, Chatbot Menu, Publish Bot, Manage Team,
Manage Offline Hours, Connect Stripe, Connect Zapier, Connect Shopify, Bot Synchronize, and Clear Data.

2.6 Publish

This toolbar allows you to publish your completed chatbot on WhatsApp, website, Instagram and Facebook platforms.

2.7 Documentation

Redirects you to our help section.

3. How to Create a Story

Learn how to create a story from the scratch

Step 1
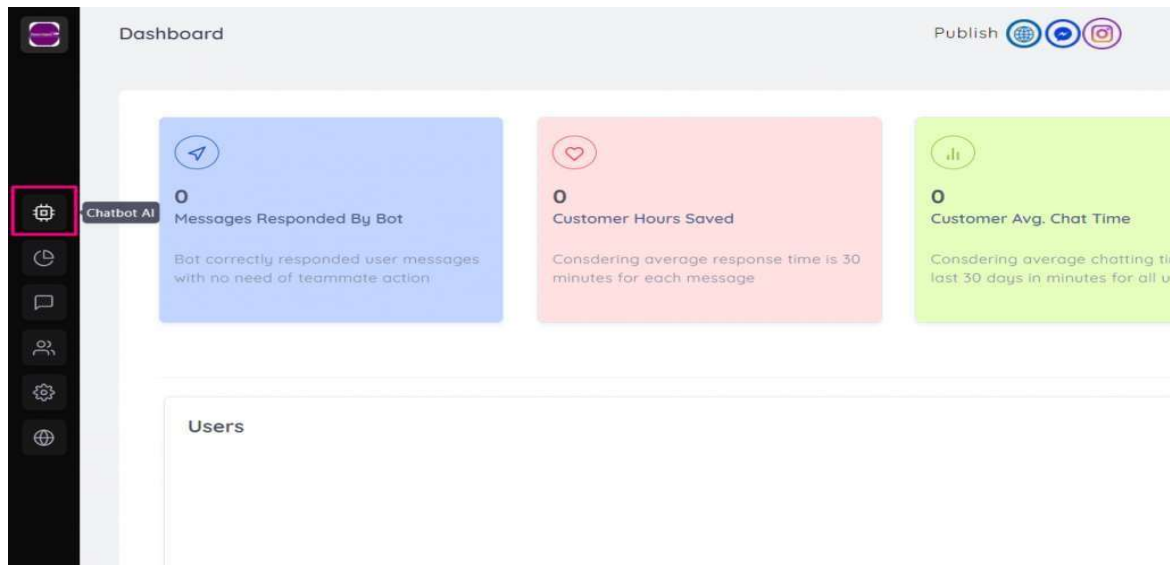
After signing in, the first step is to go to the "chatbot AI" from the extreme left toolbar.

Step 2
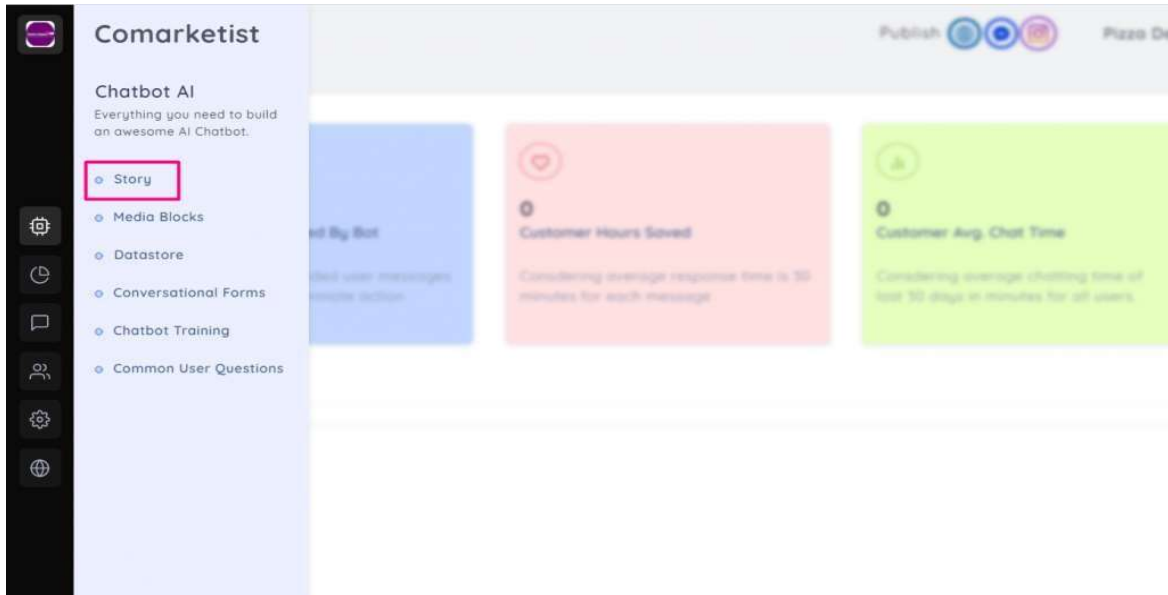
To begin with, story building, click the "Story" link from the chatbot AI section.

Step 3
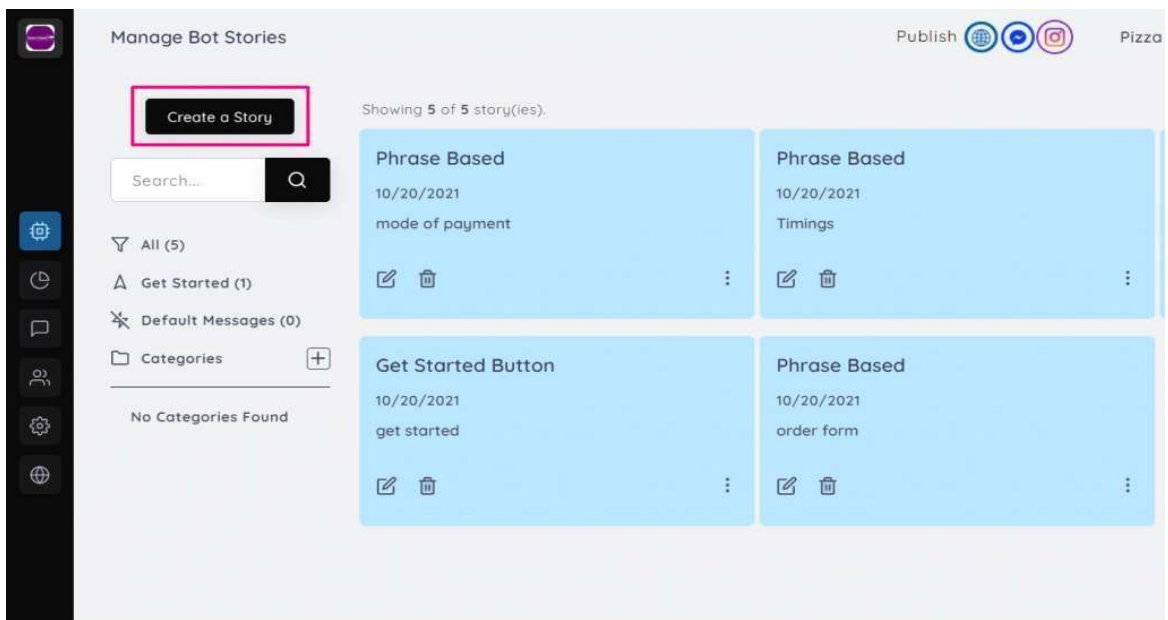
A window like shown above will appear so click the "create a story" link to start creating the story.

Step 4
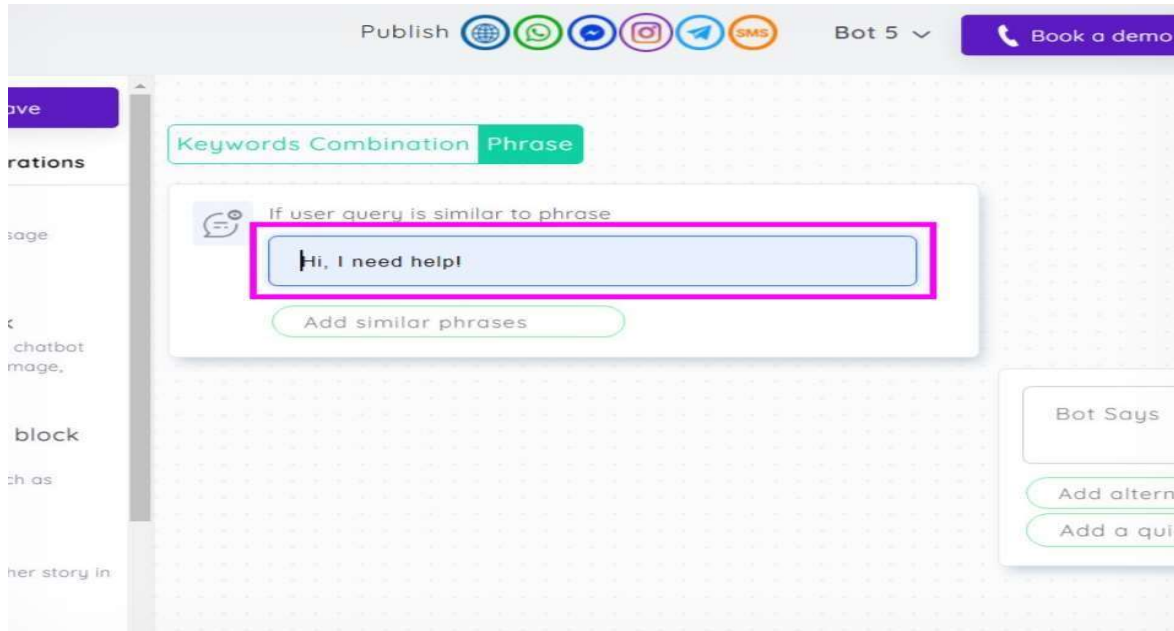
Enter the user message in the field pictured above.

Step 5
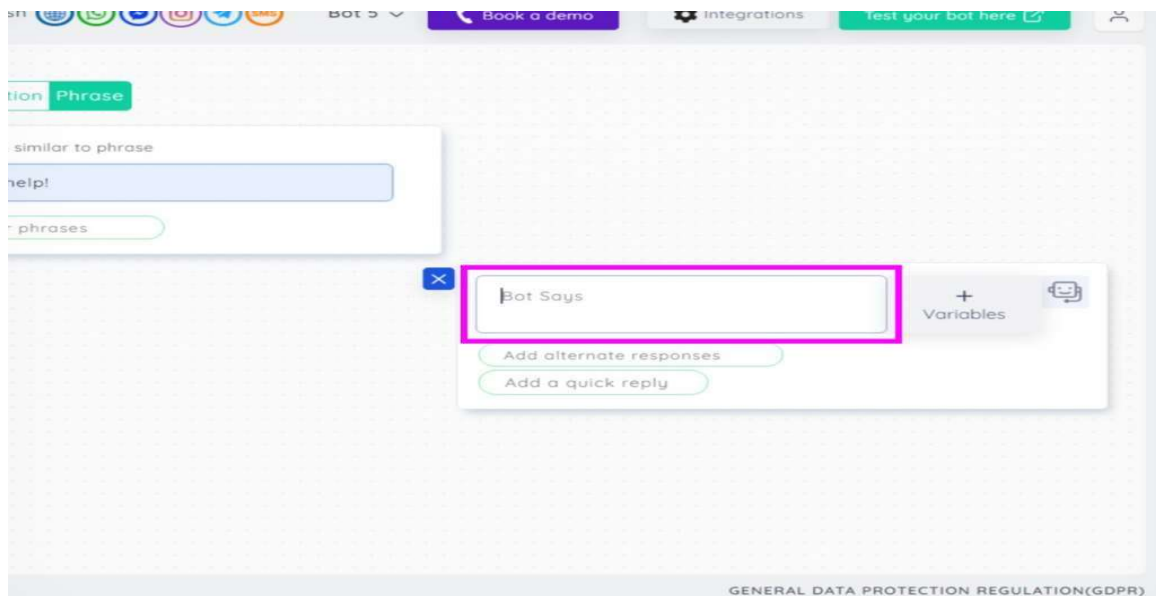
Enter the bot message in the field pictured above.

Step 6
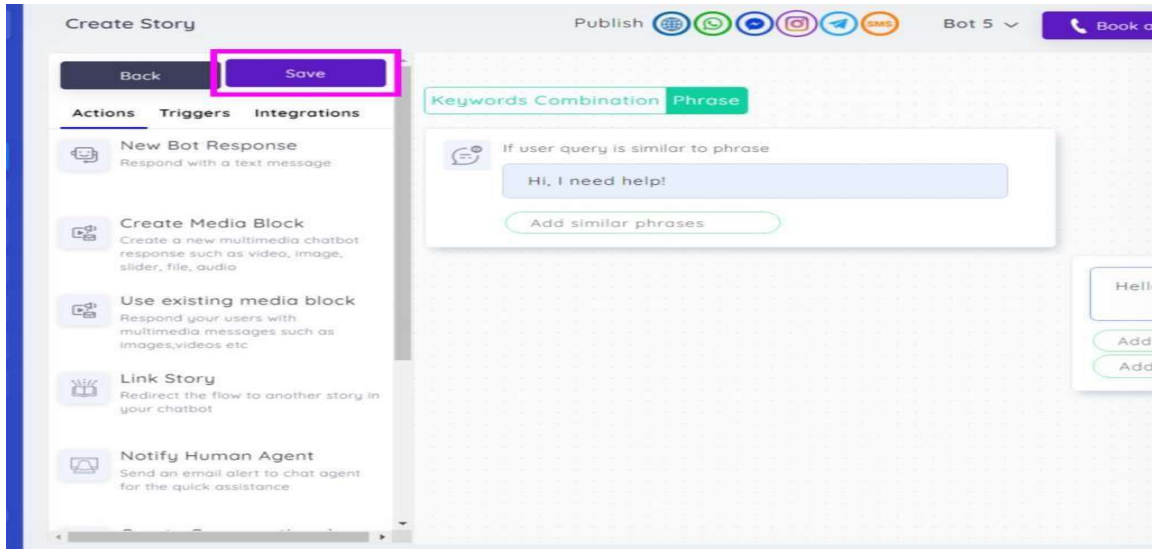
After entering the details, do click the "Save" link and save your story.

Step 7
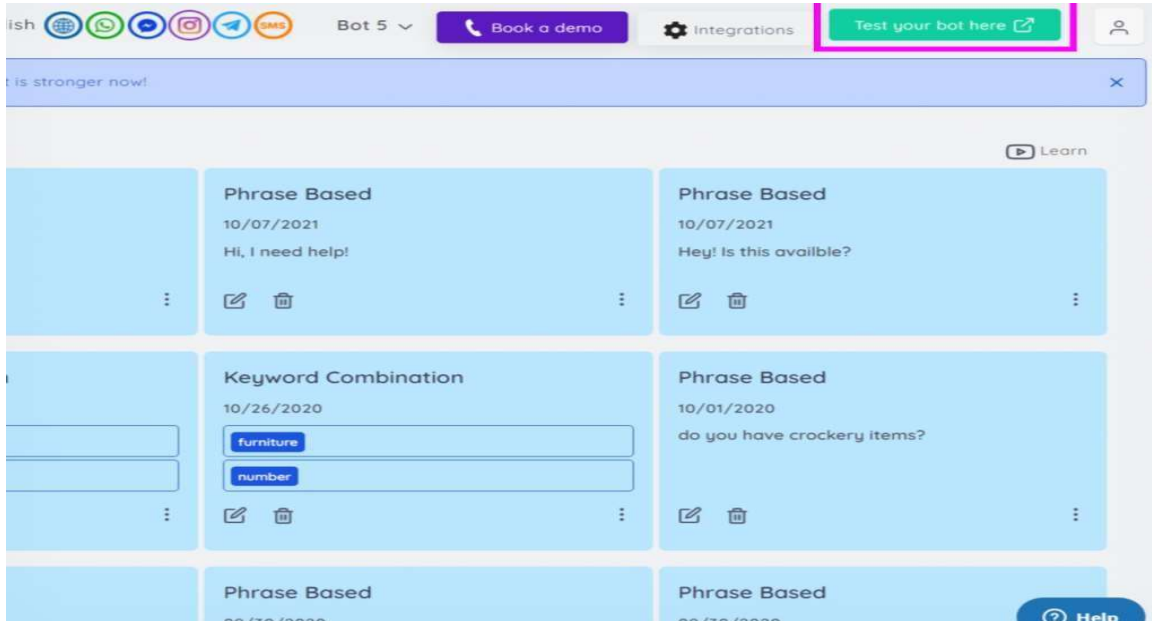
Once you have saved the story the next is to click the "Test your bot here" link and see if your bot is working accurately or not.
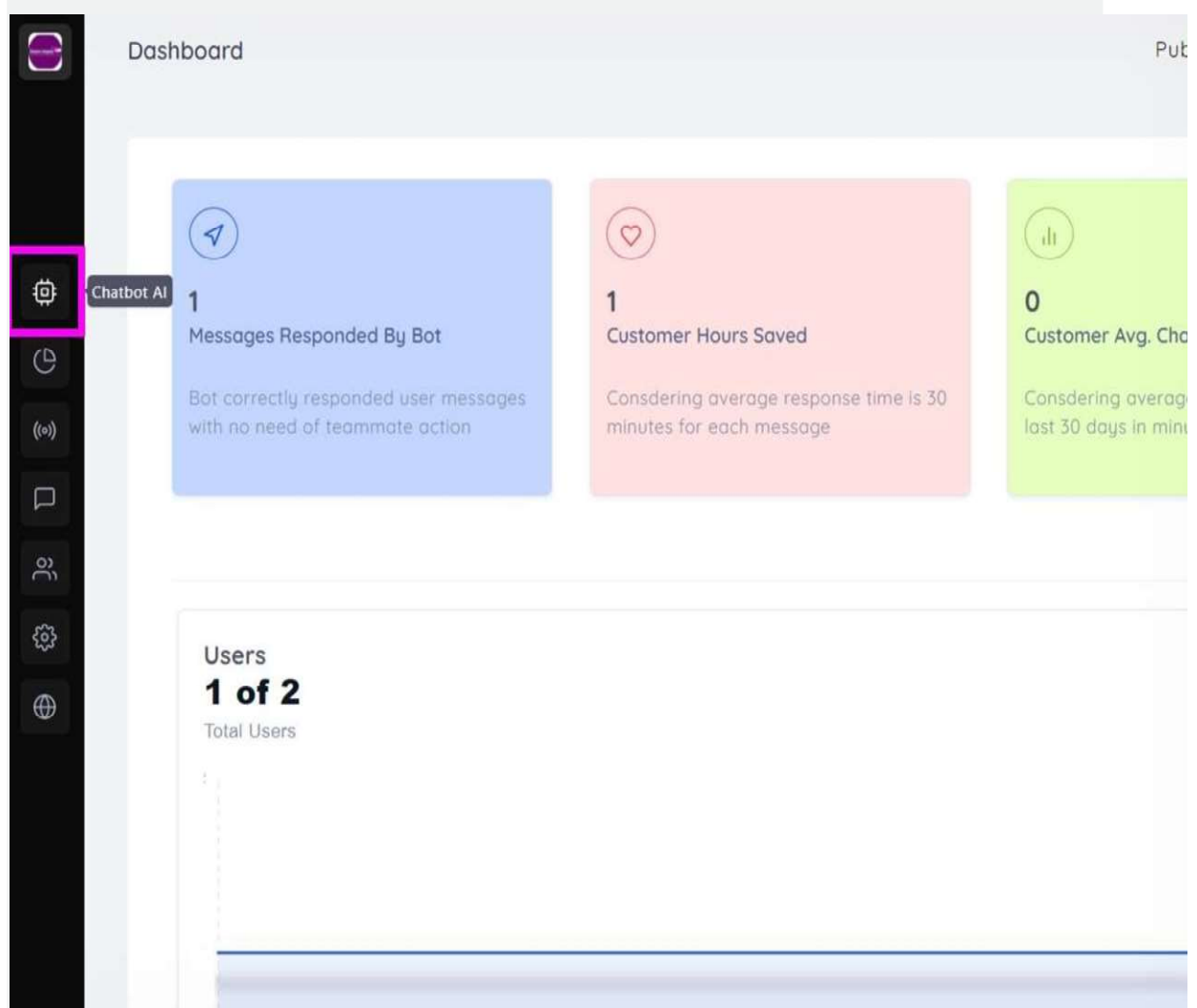
4. How to create a text media block.

Learn how to create a text media block along with the use of buttons Step...

Go Back

Learn how to create a text media block along with the use of buttons

Step 1

Go to the chatbot AI from the left toolbar

Step 2

Then click on the "Media Blocks"

Step 3

Next, a screen will appear showing your all media blocks. So click on "create media block"
to start from scratch

Step 4

Click "Text Message" to start

Step 5
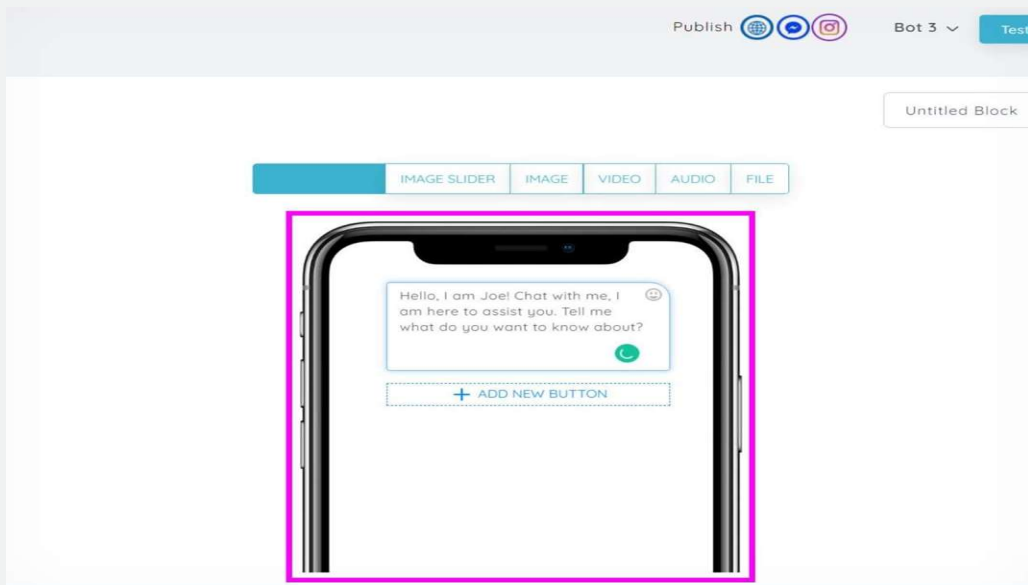
Enter the text you want to show up to the users.

Step 6
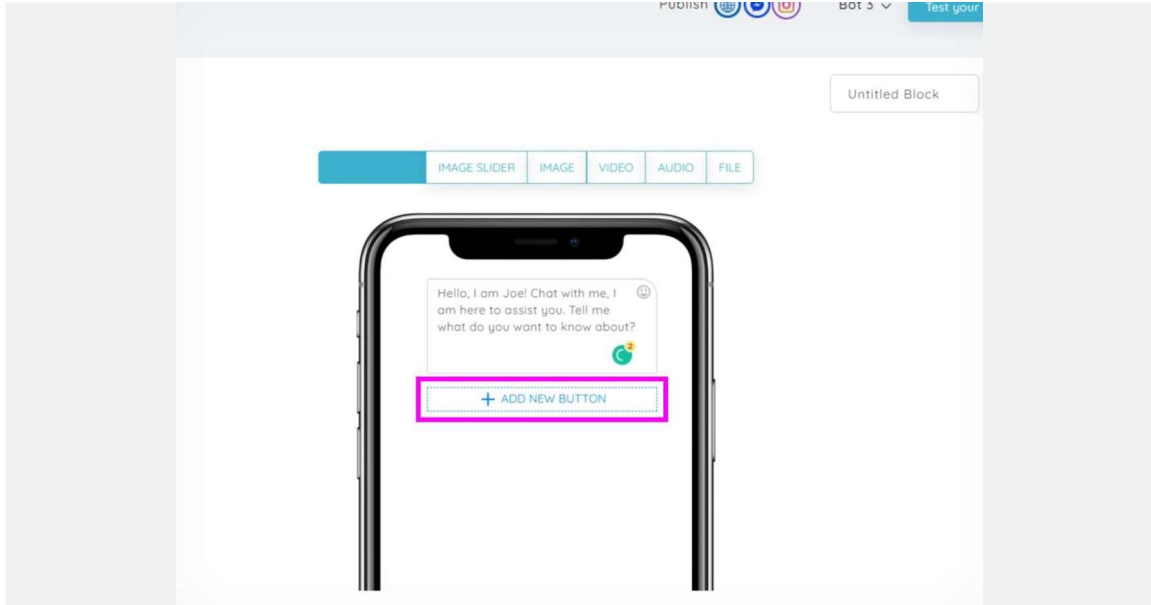
Then click "Add new button" to help users to get in touch with the bot easily

Step 7
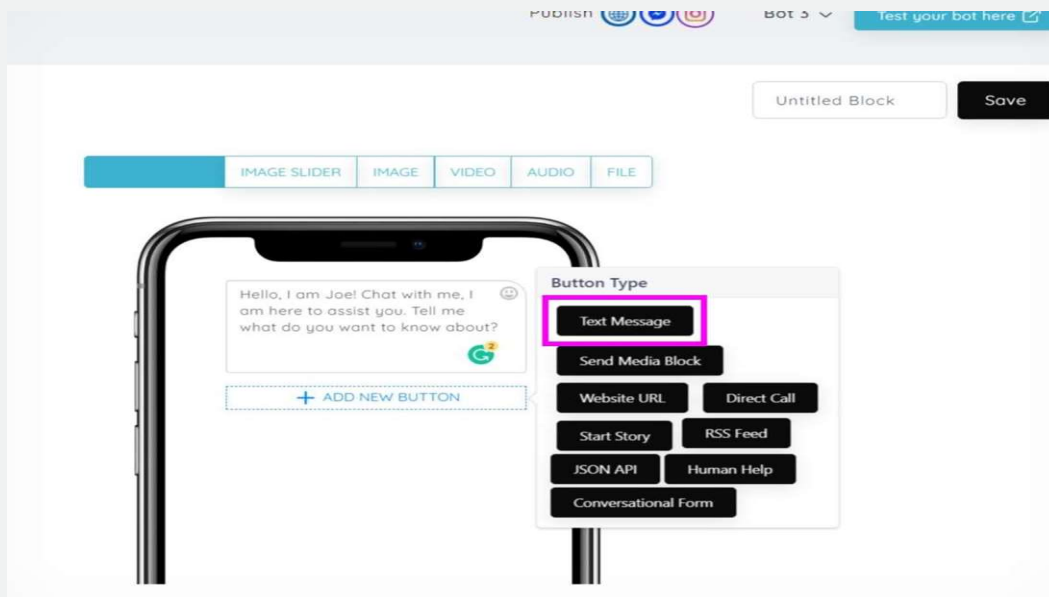
By clicking the "add new button" a list of buttons will pop up. Choose the one you are looking for!

Step 8
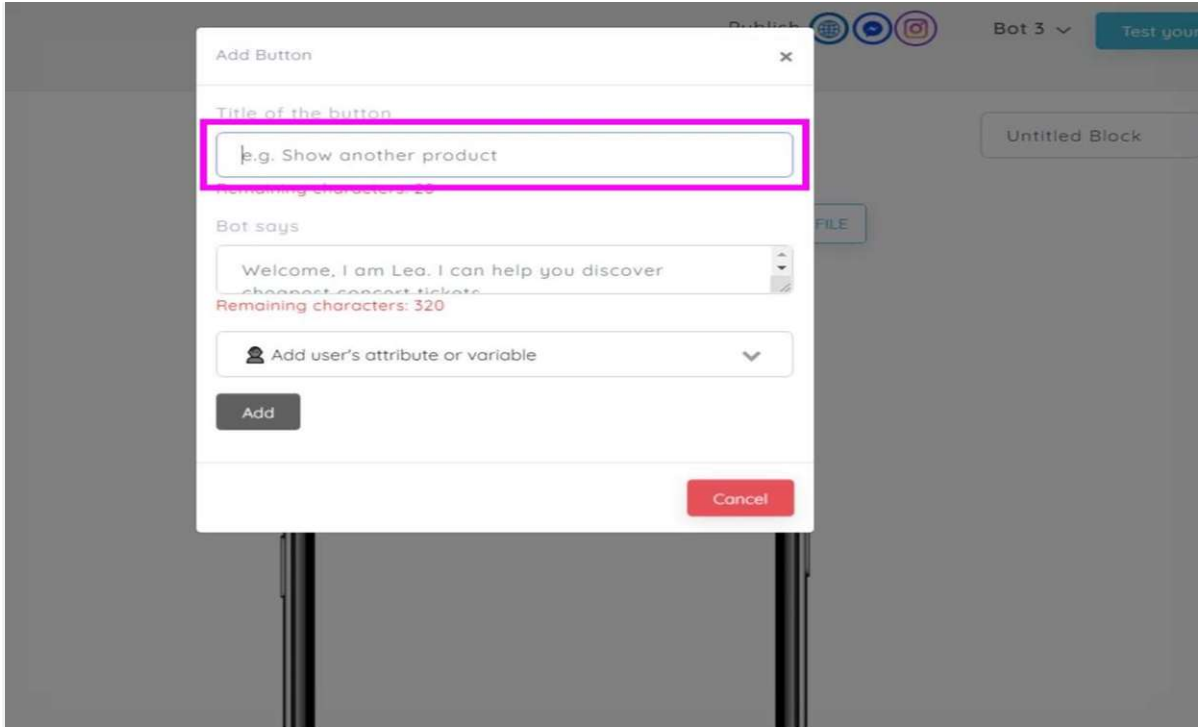
Add the title of the button and its user attribute

Step 9
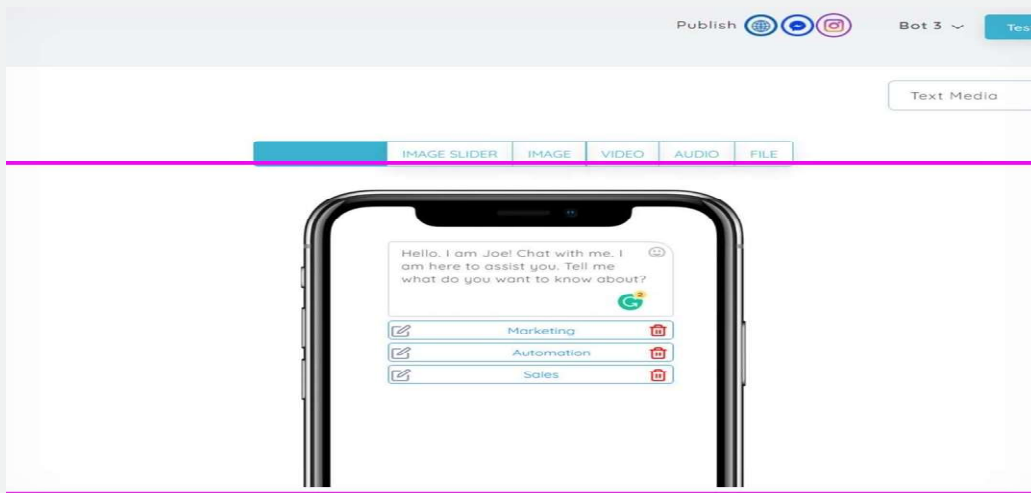
This is how all your buttons will look like

Step 10
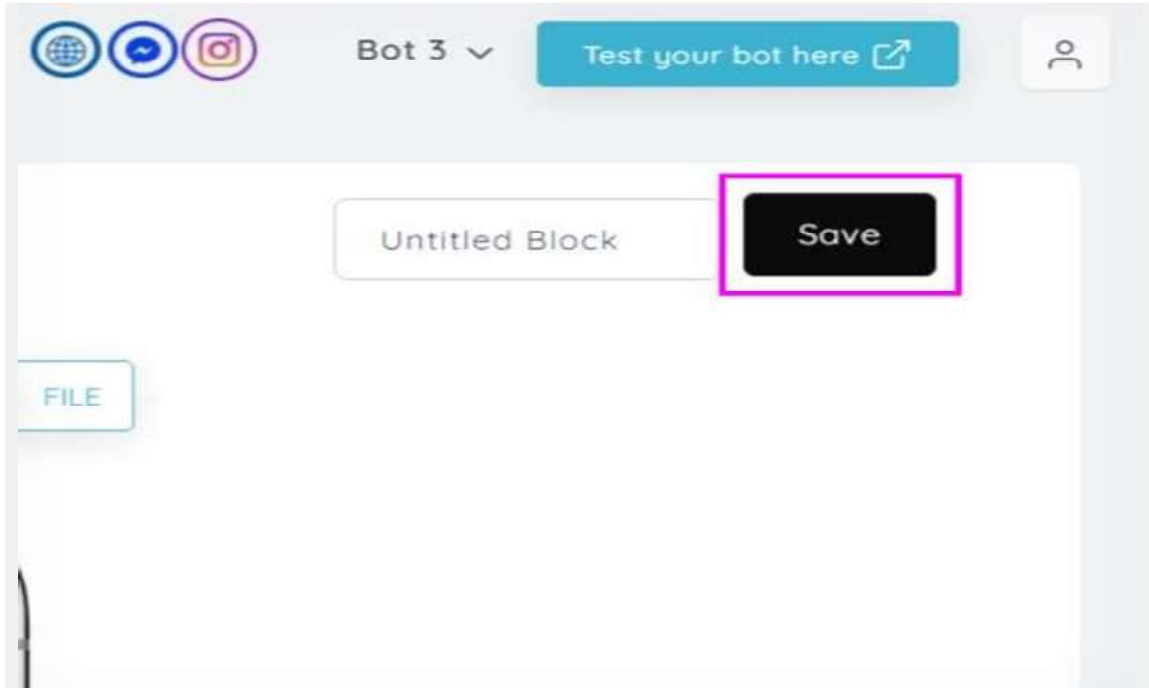
Once you are done with the buttons, name the media block, and save it

Step 11
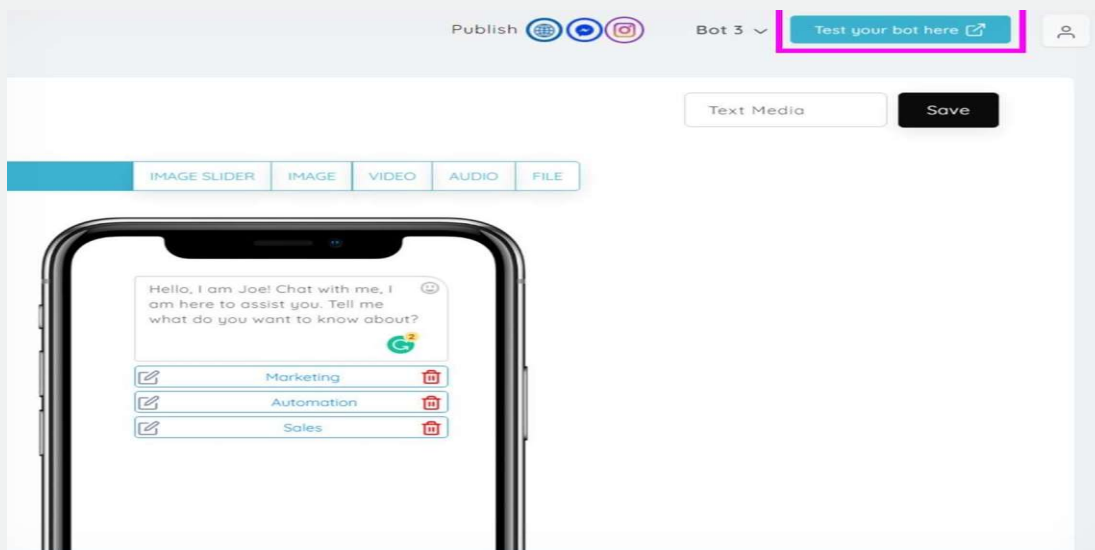
Lastly, test your bot to know if everything is working fine

5. Creating an image media block
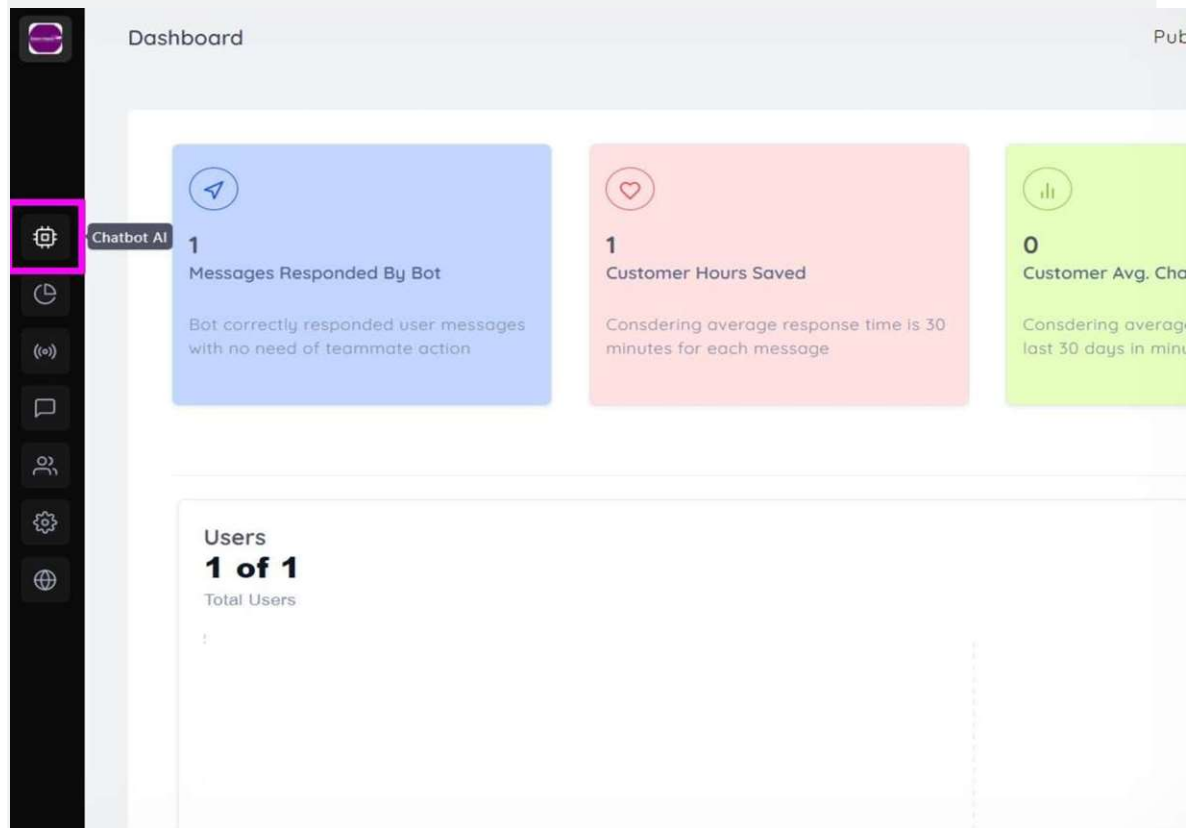
Creating An Image Media Block

This instructional guide will help you create the image media block for your story Step...

Go Back
This instructional guide will help you create the image media block for your story

Step 1

To start creating the media block go to "chatbot AI" from the extreme left toolbar

Step 2
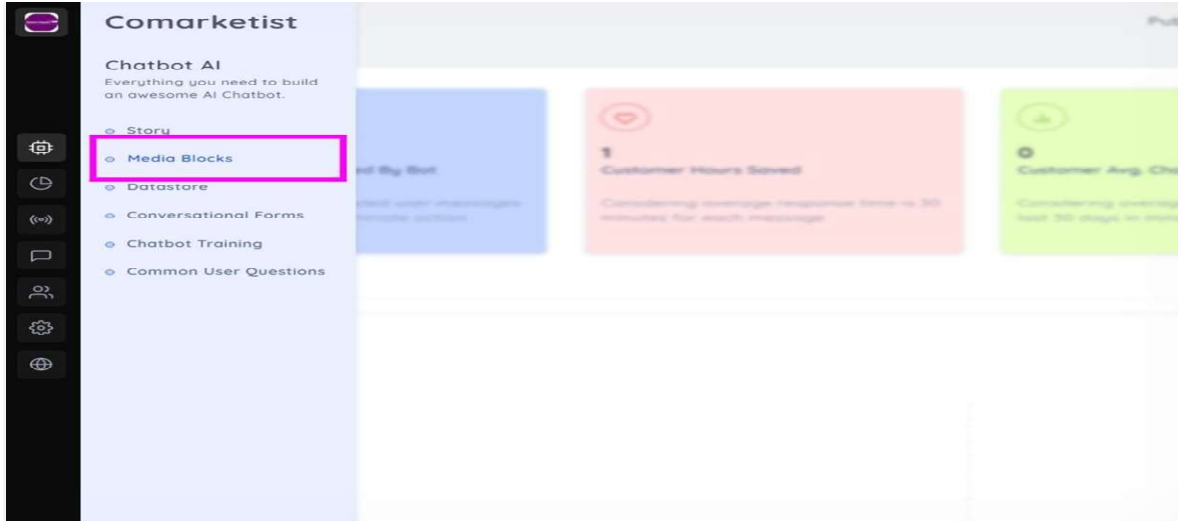
From the chatbot AI section click the "Media Blocks" to start with building the media blocks.

Step 3
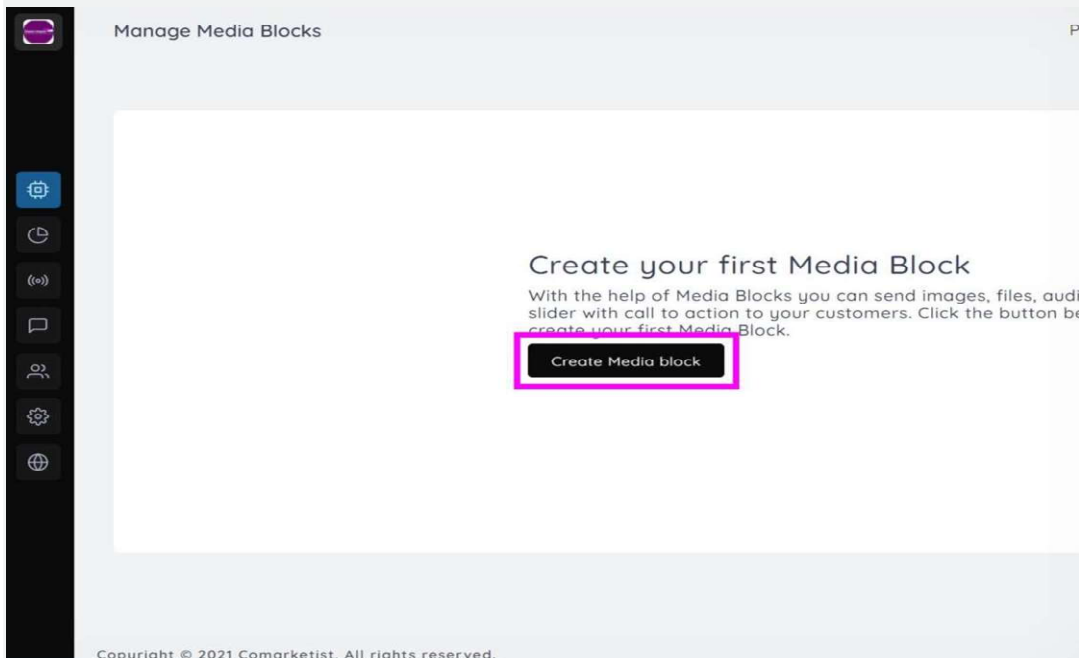
The window, as shown above, will appear then click the "Create Media block" link to continue creating the media block.
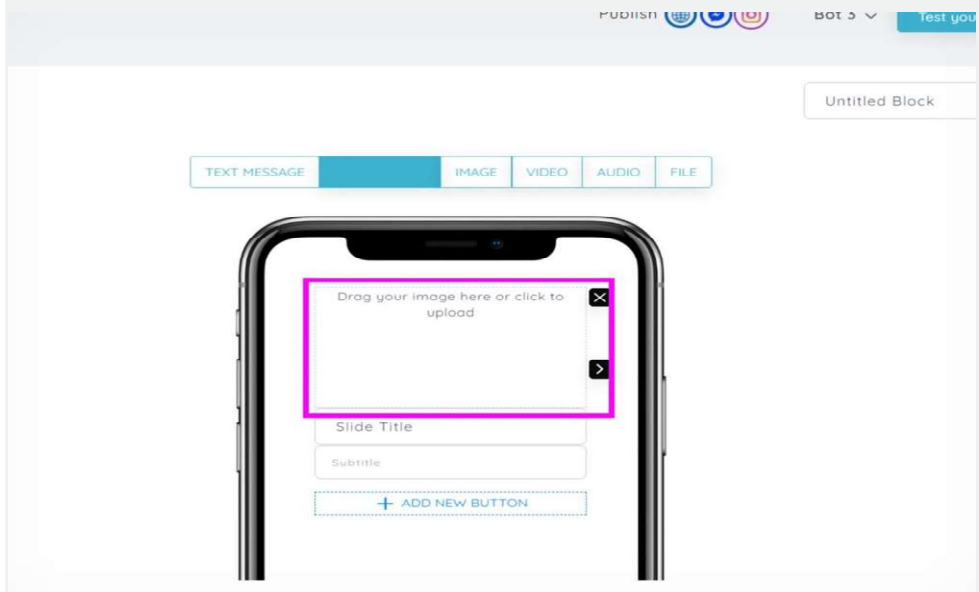
Step 4
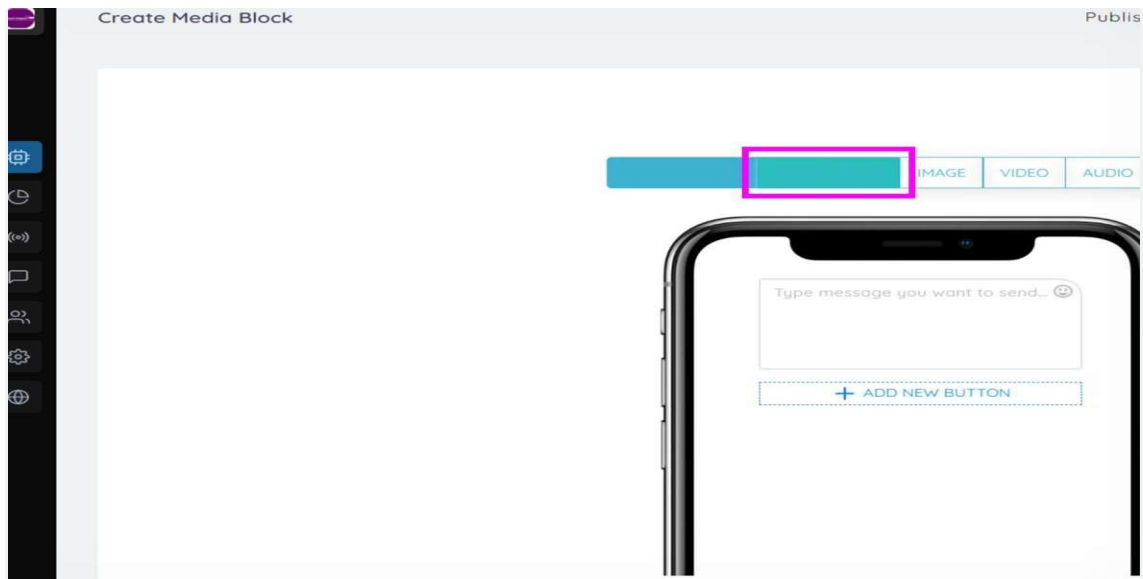
The page like above will appear, which has multiple options such as text message, image slider, image, video, and audio. Click the "IMAGE SLIDER" button as you are creating an image media block.
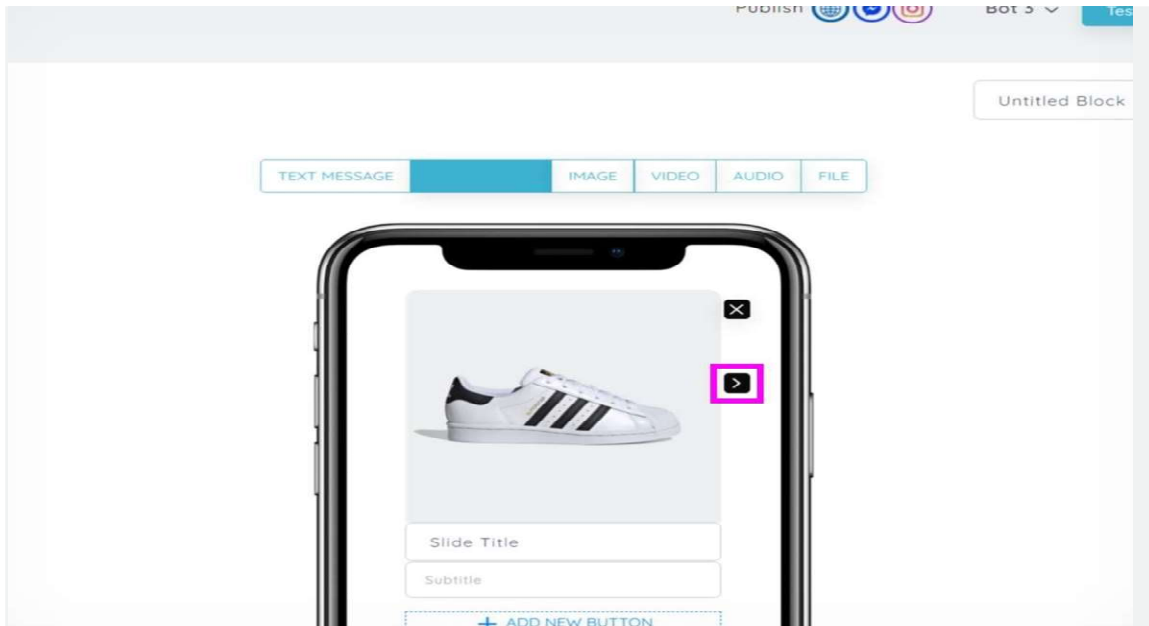
Step 5

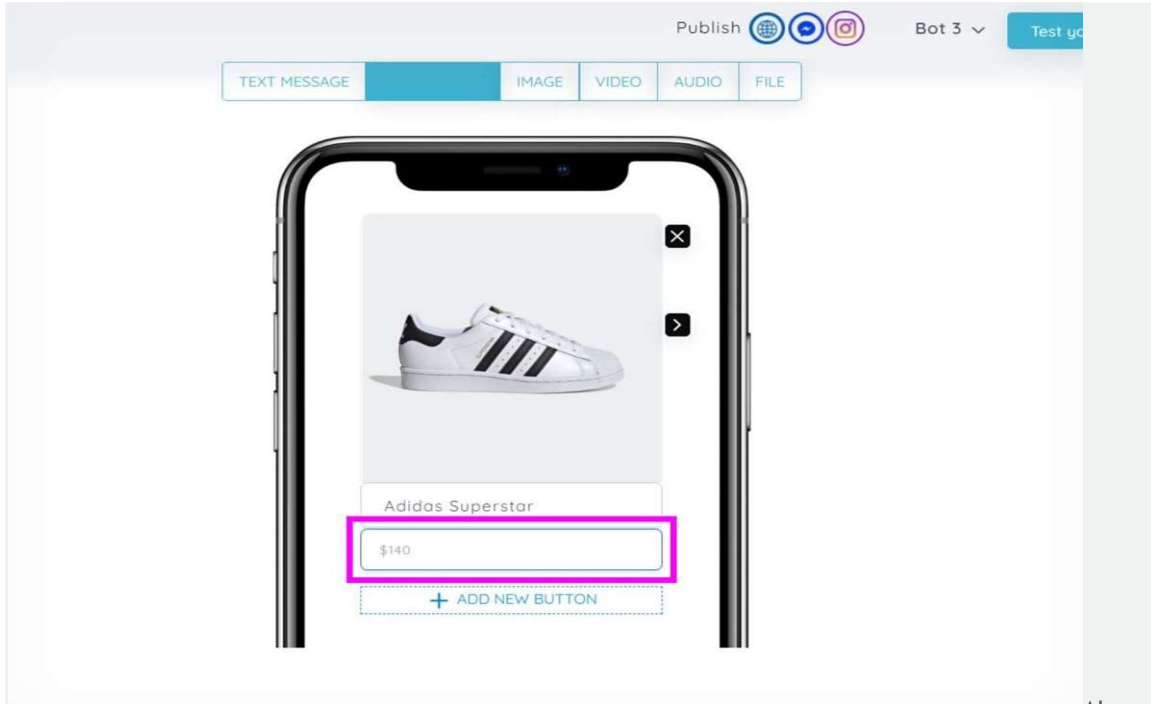Drag your image or click to upload to the image for the media block.

Step 6

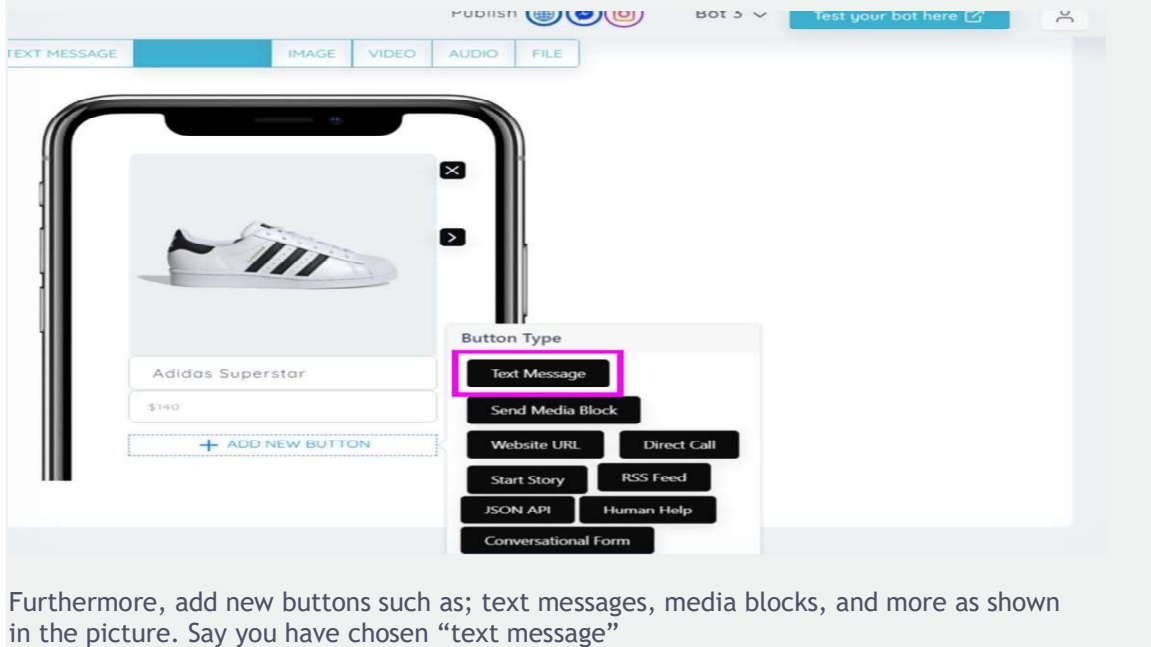With the arrow, you can add more images and create an image slider.

Step 7
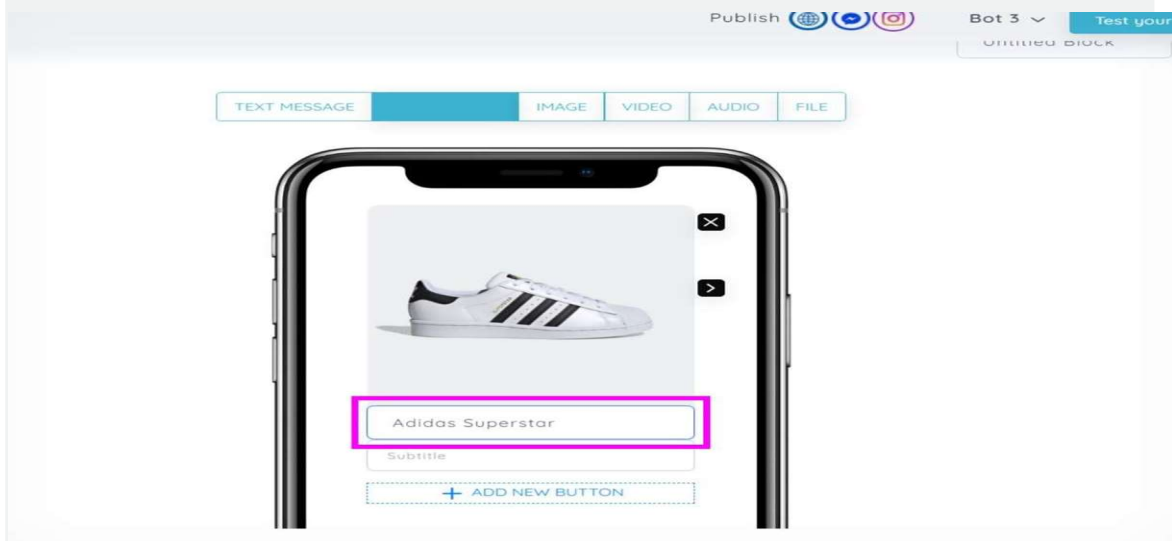
Add the title of the product, make sure it is clear to the audience, and defines the product accurately.

Also, add the subtitle that ideally includes the price of the product as shown above.
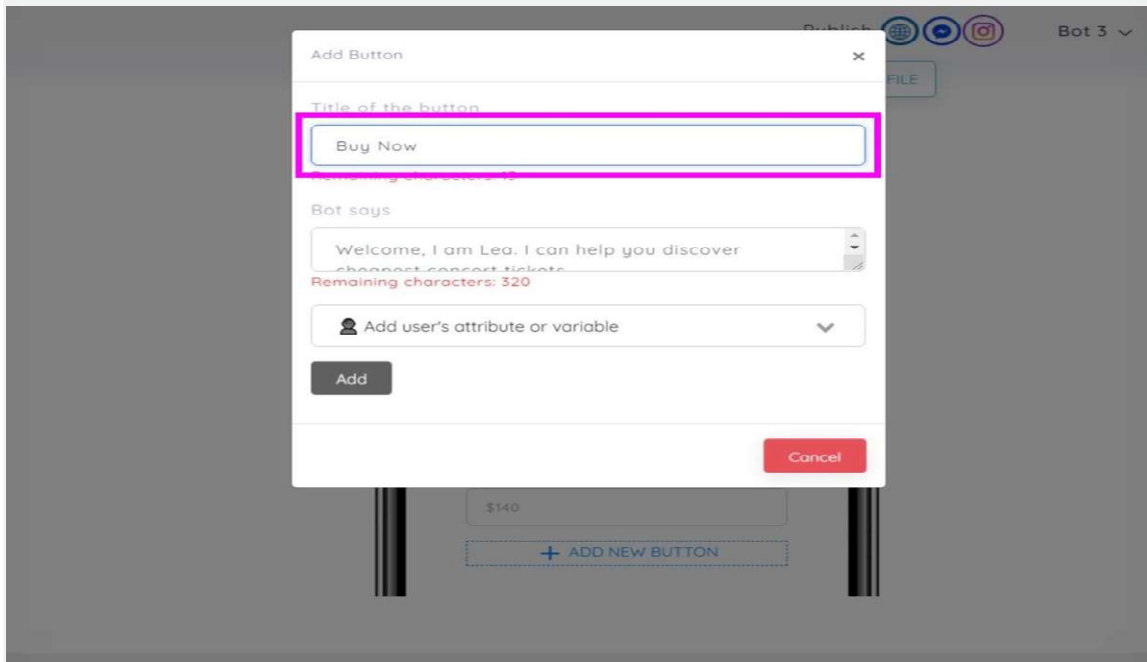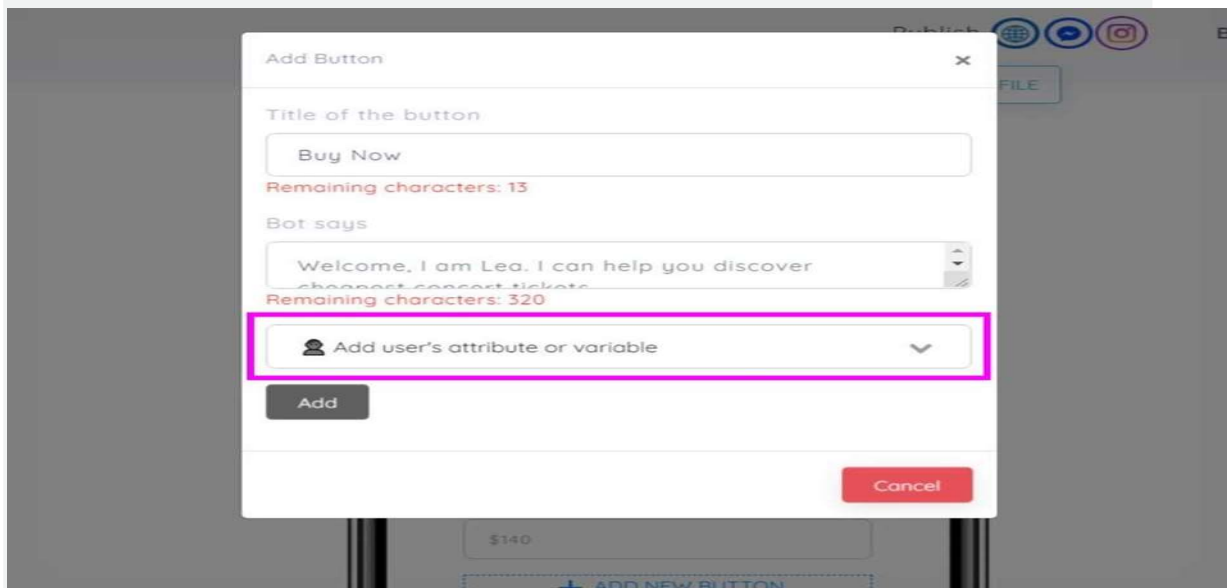
Step 8

Furthermore, add new buttons such as; text messages, media blocks, and more as shown in the picture. Say you have chosen "text message"
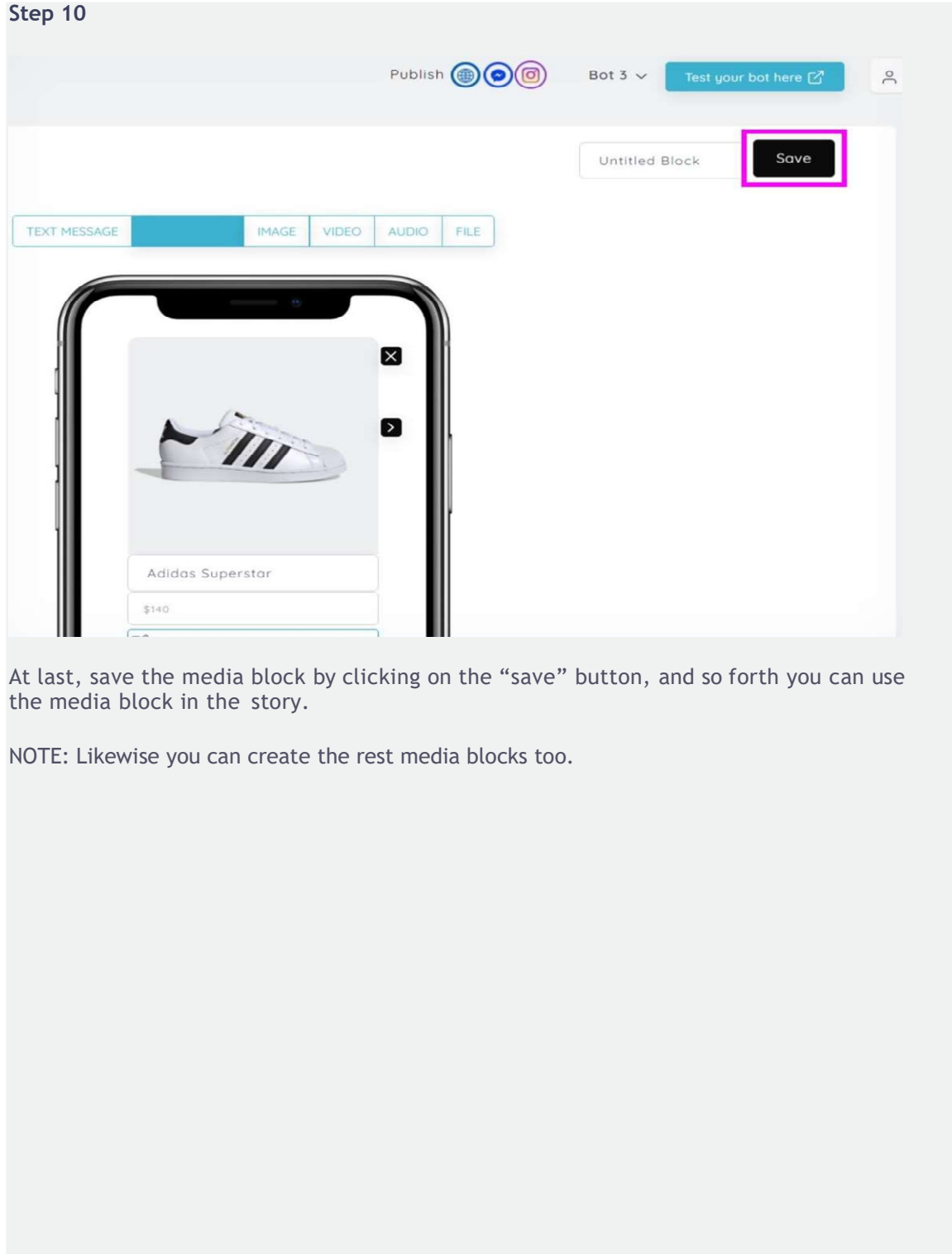
Step 9

The next is to add the title of the button like here it is "buy now" showing the call-to- action for the user.

Also, add user attributes or variables for better assistance of the user.

Step 10

At last, save the media block by clicking on the "save" button, and so forth you can use the media block in the story.

NOTE: Likewise you can create the rest media blocks too.
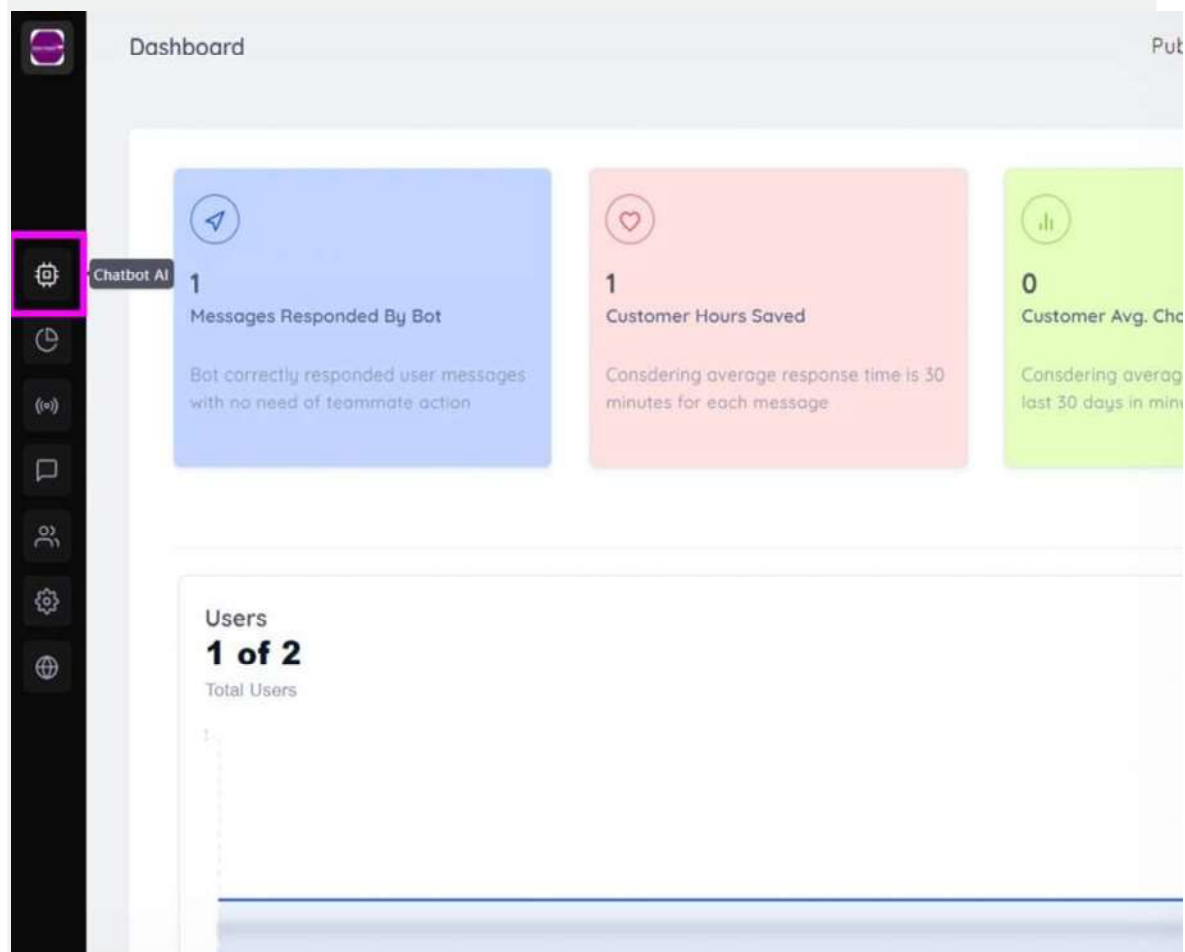
6. How to create a video media block

 How To Create A Video Media Block
Learn how to create a text media block along with the use of buttons Step...

Go Back
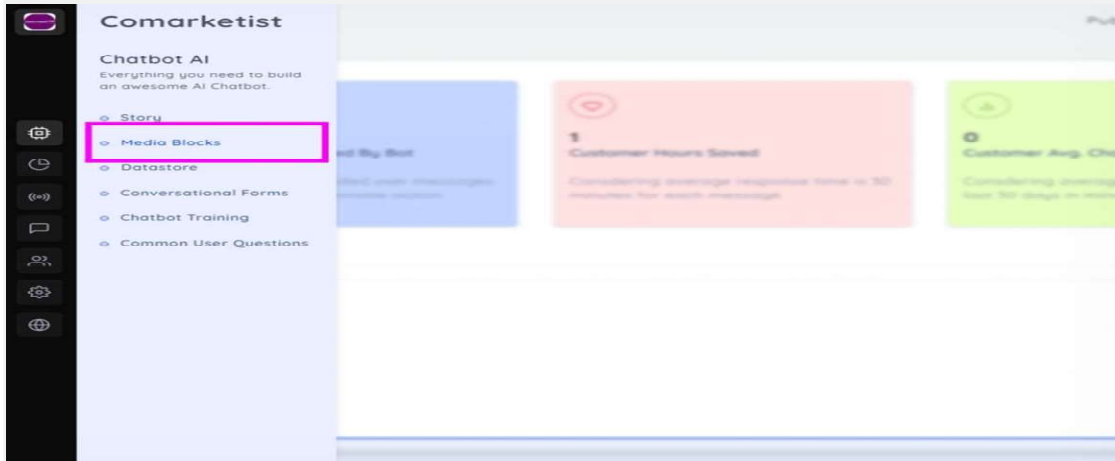Learn how to create a text media block along with the use of buttons
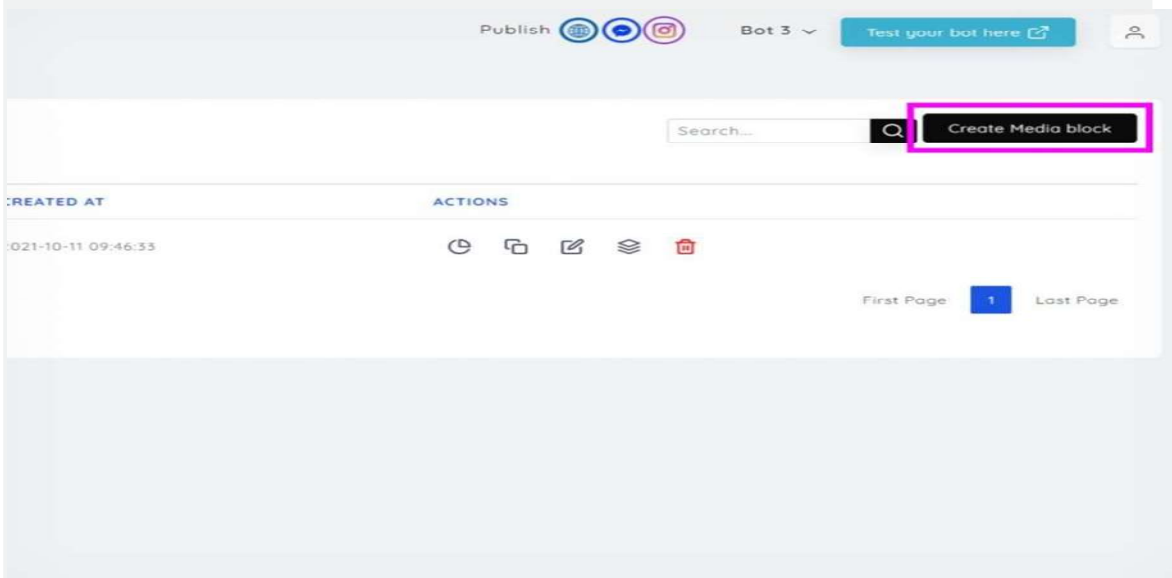
Step 1

Go to the chatbot AI from the left toolbar
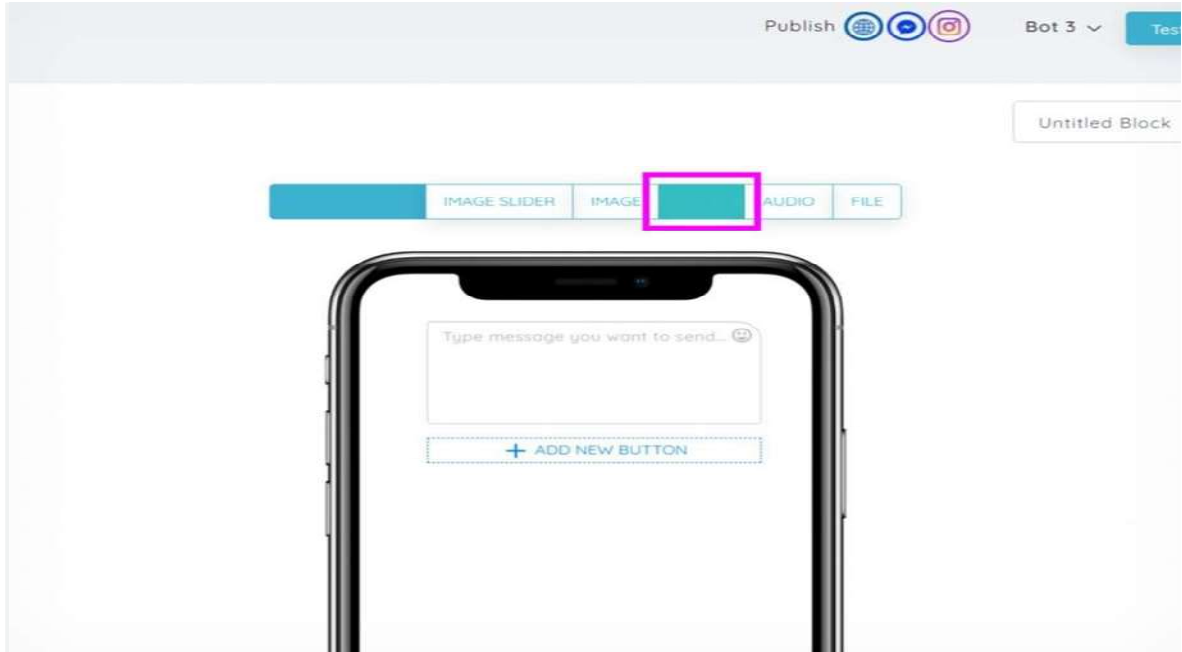
Step 2

Then click on the "Media Blocks"

Step 3

Next, a screen will appear showing your all media blocks. So click on "create media block" to start from scratch
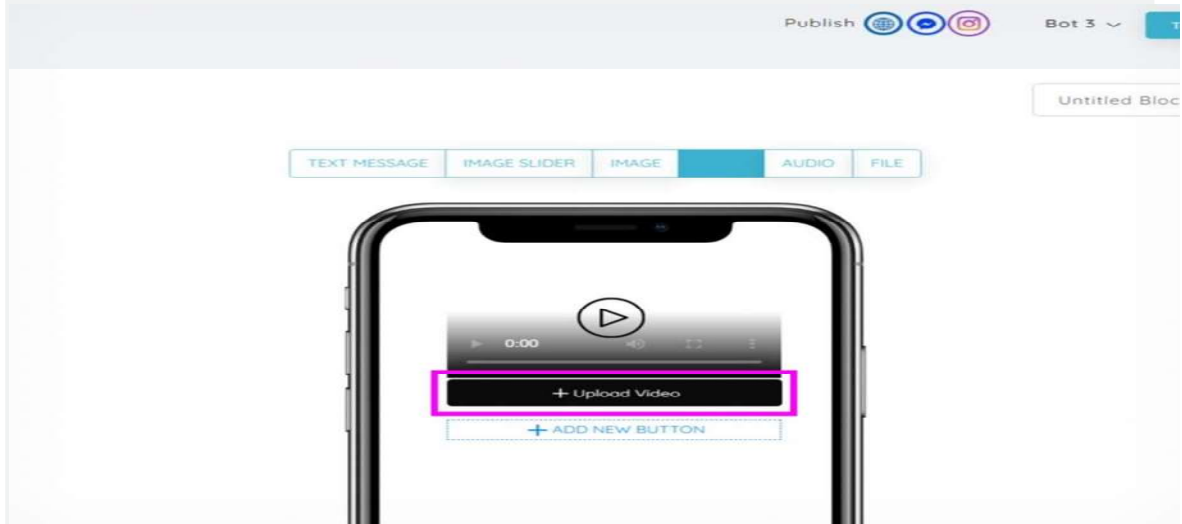
Step 4

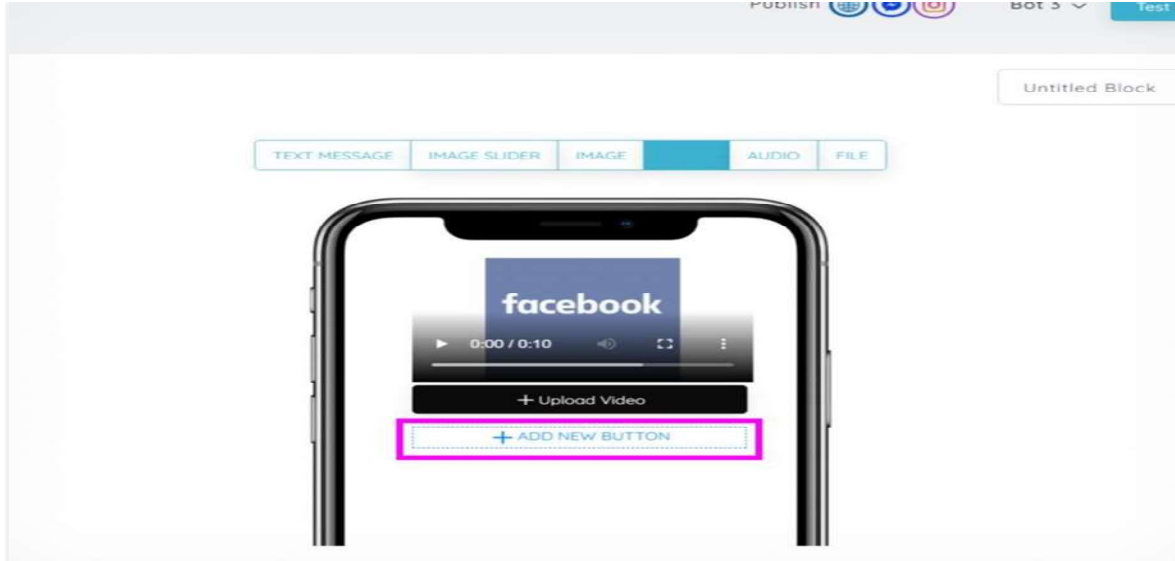Click the "VIDEO" button to create the video media block.

Step 5

By tapping on the "upload video" you can add up the video you want to show to your users.
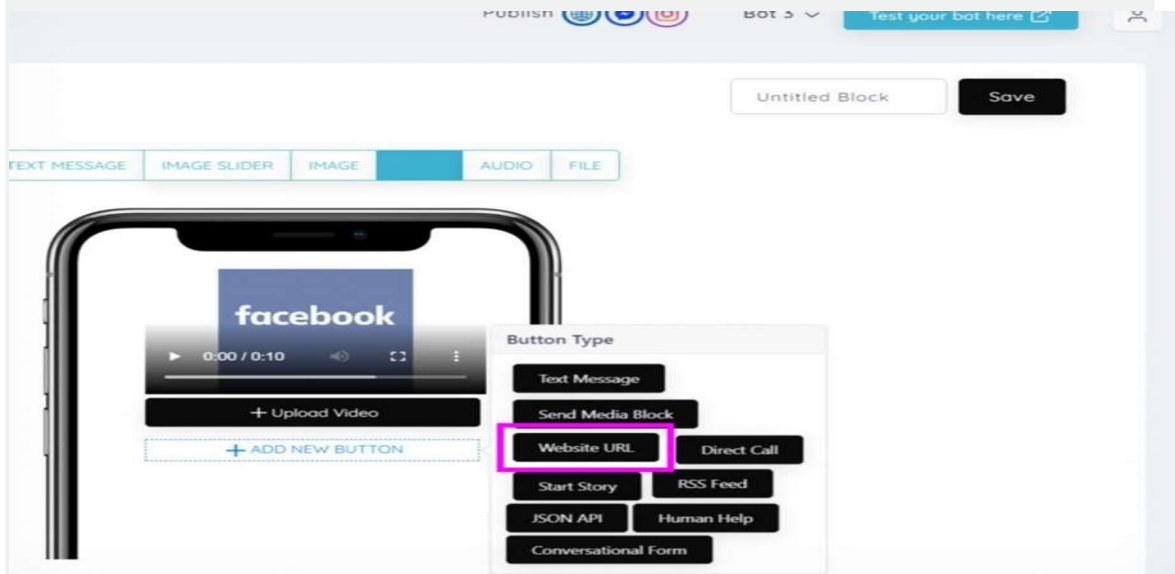
Step 6

To add the button that shall be actionable for the users can be added from the "add new button" section.
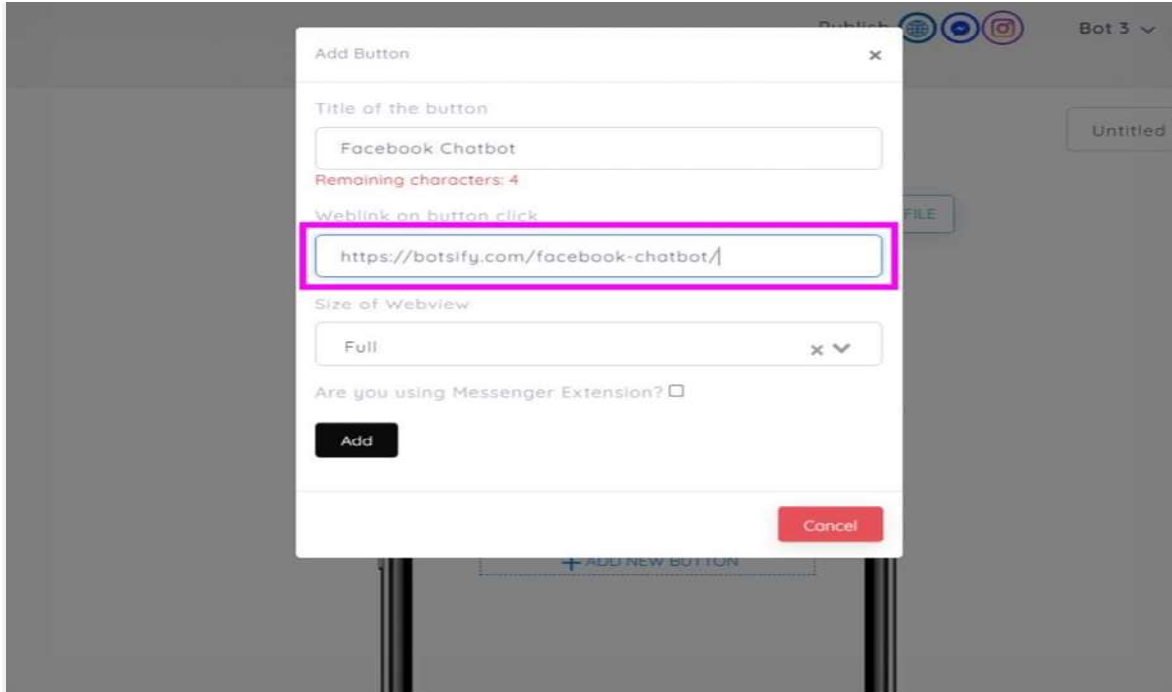
Step 7

From the "add new button" option you can have multiple button type options, I have chosen the website URL for the demo
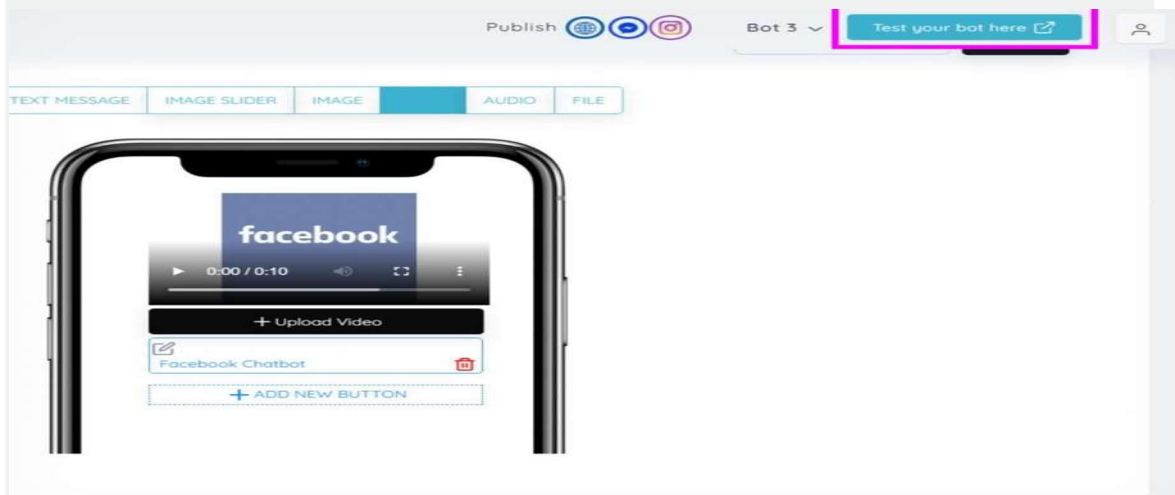
Step 8

After adding the button type you will have to add the required field, as shown above. Add this and then save your media block.

Step 9

At last, click the "Test your bot here" to complete the process.
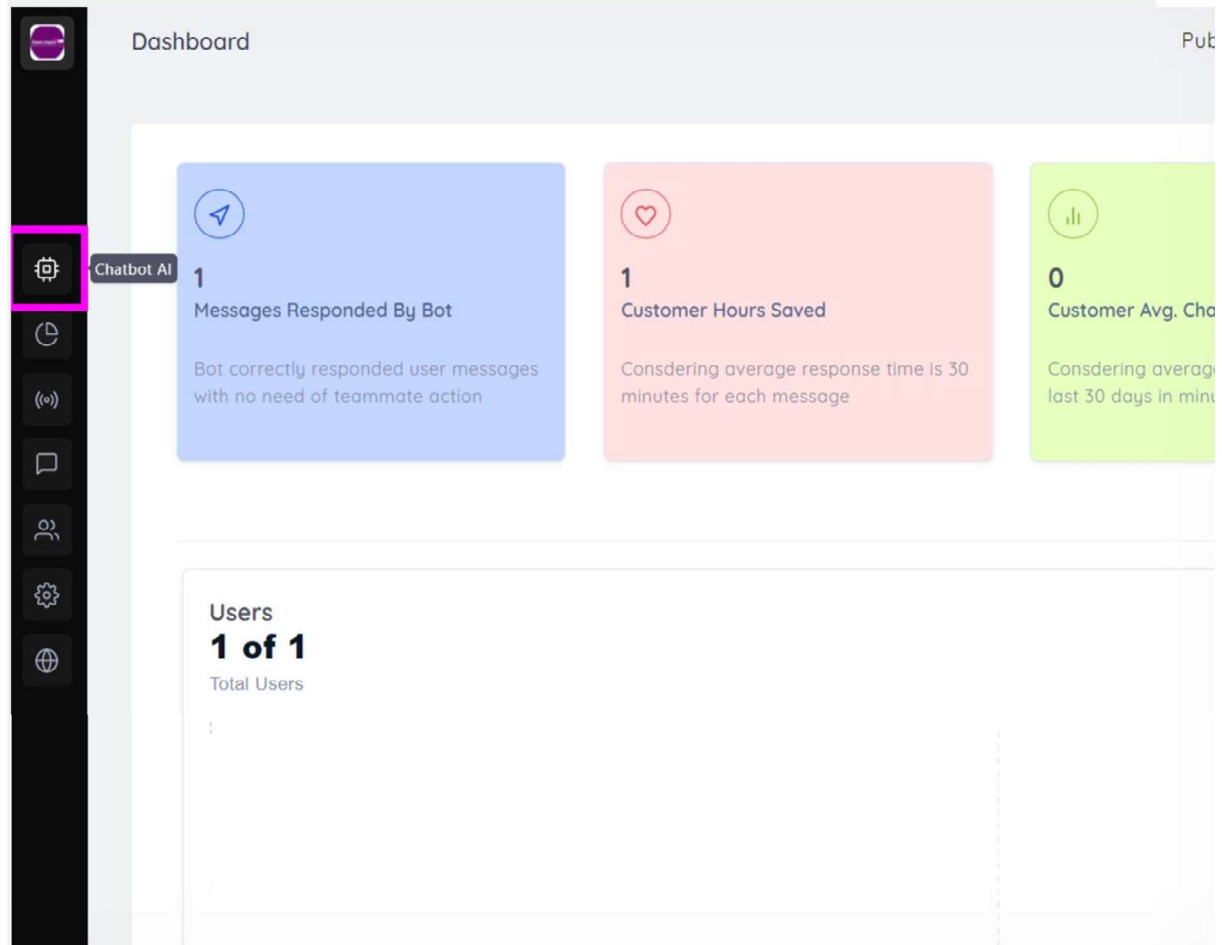
7. How To Create A Conversational Form

How To Create A Conversational Form This guide will help you in understanding the creating...

Go Back
How To Create A Conversational Form

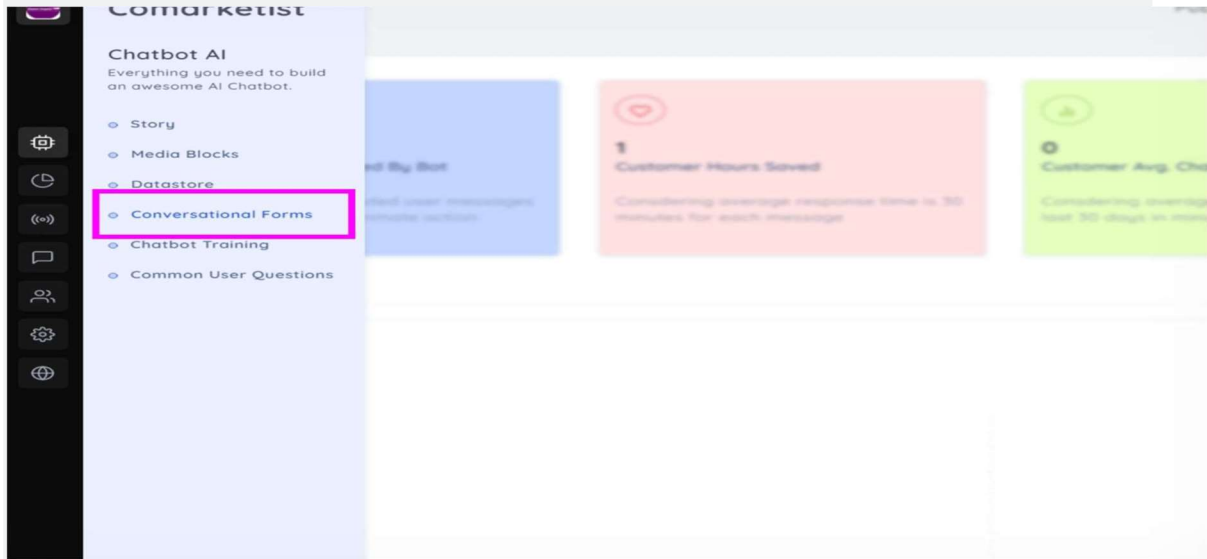This guide will help you in understanding the creating process of conversational form

Step 1

To create the very first conversational form, the first step is to hit "chatbot AI" from the left toolbar.
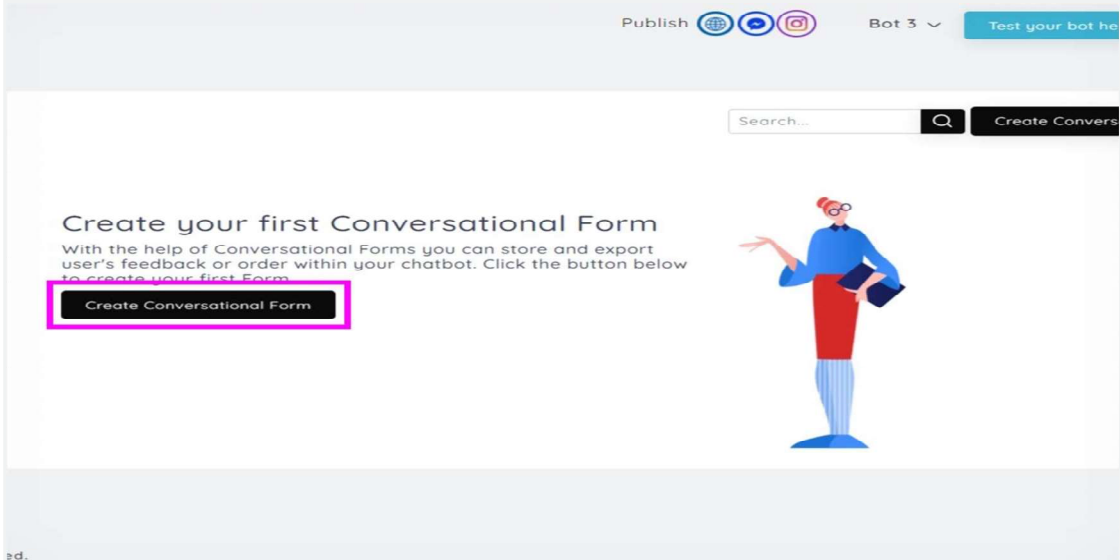
Step 2

A whole list of elements will show up then, click the "Conversational Forms" link to proceed.

Step 3

A window will appear showing to continue with the conversational form so, click the "Create Conversational Form" for the next step.

Step 4

A form will appear where you must enter the necessary details and then click the "Next" button.

Step 5

To receive the responses you get, hit the toggle on for immediate responses either via API or email

Click the "Email me responses Email" element and enter the email where you want the responses to be dropped

Step 6

Create a Form   Pub

Default Form 0

1
Fields

On Form Submit

Call API with response data

Email me responses

Email Address
Separate multiple emails by comma. maximum 5 emails

alishba@botsify.com

Basic Settings

Lastly, hit the save button to save the entire conversational form.