

Building a conversation

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Conversations have three main components: Reaching out, the consent agreement, and the conversation body.

Reaching out: The first interaction your visitor sees, prompting them to engage with your bot.

- Can include one or two interactions.
- Can pop up on the visitor's screen, grabbing their attention.

Consent agreement (optional): A request for the visitor's consent for your use of their personal information.

Conversation body: The rest of your interactions. Visitors can engage with your bot with multiple questions, messages, and actions possible.

Your conversation

Your conversation consists of multiple interactions, organized in three parts: reaching out, a consent agreement, and the rest of the conversation. Interactions can be questions, messages, or actions, including offering scheduling to your visitor.

[Learn more about interactions](#)

Reaching out

The **Reaching out** interaction is the first your visitor will see from you. It grabs their attention and prompts their engagement. When they click on an answer, your widget opens fully so ChatOnce can engage in a conversation with them.

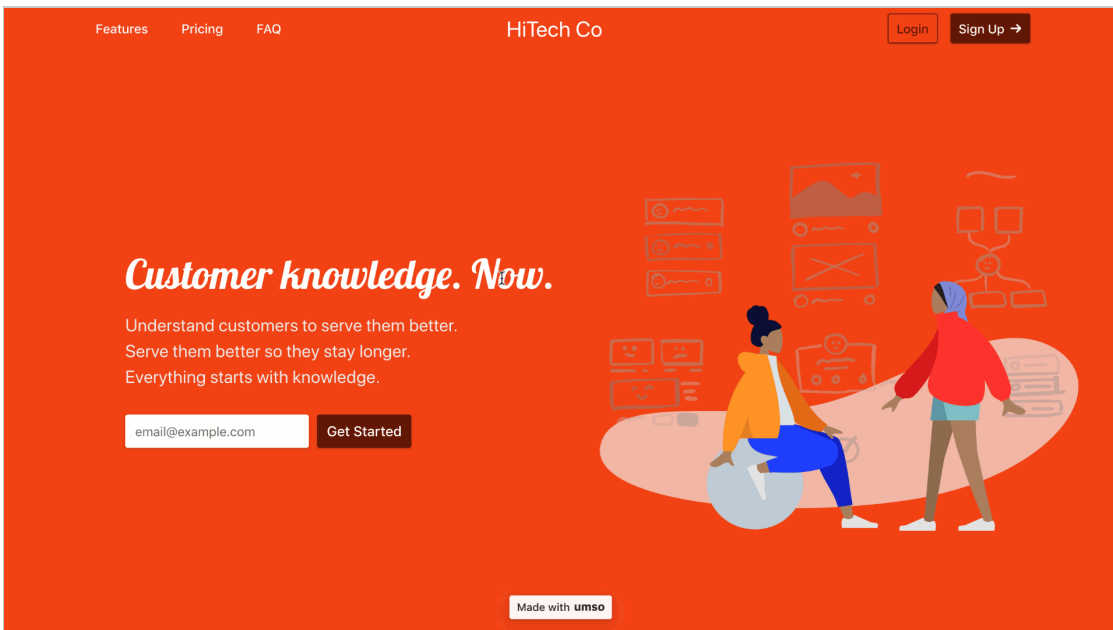


Figure 1: Reaching out

You can add up to two interactions to the Reaching out section.

To build your Reaching out interaction, drag and drop an interaction from the **Add interaction** section.

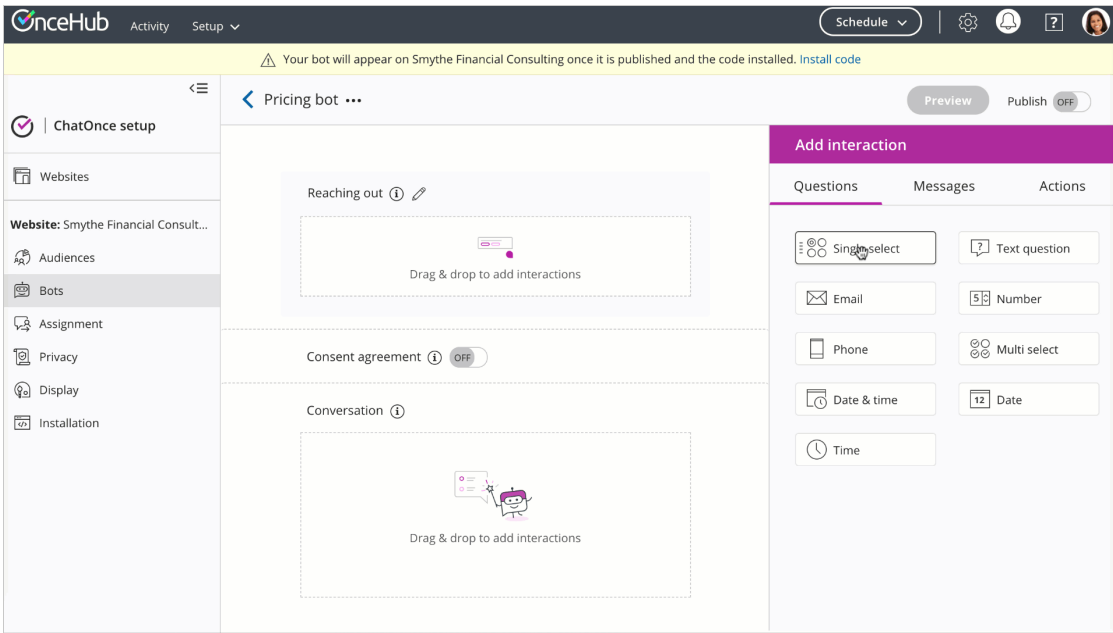


Figure 2: Create your bot's first interaction: Reaching out

Consent agreement

Some regions, such as the EU, require you to gain consent before using a visitor's personal information.

To keep things simple, ChatOnce provides default text you can use to request their consent. Simply toggle on the consent agreement.

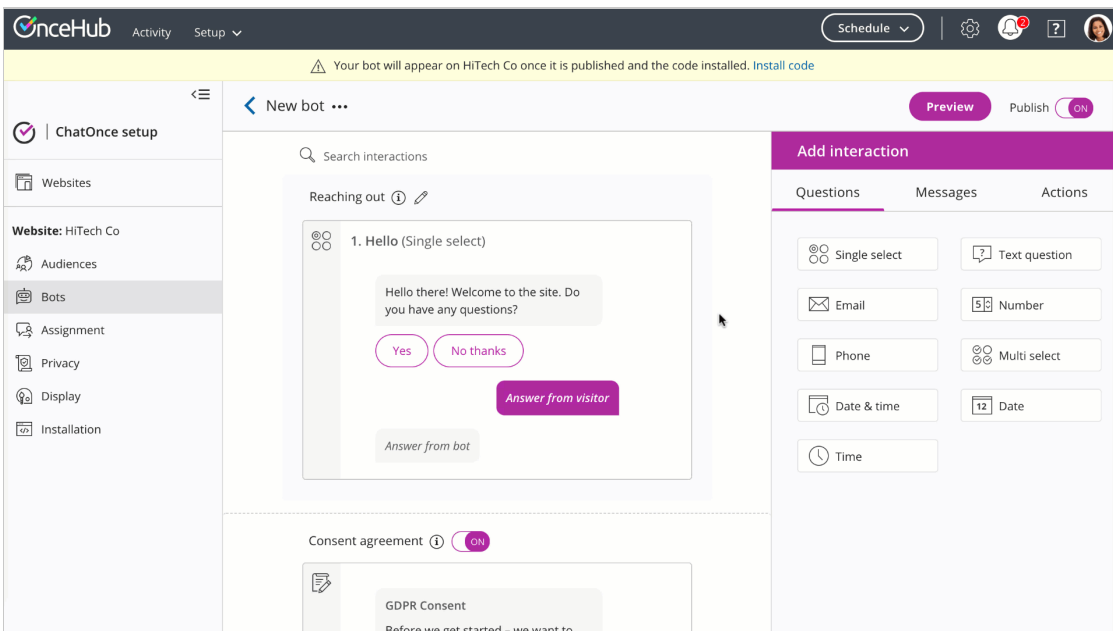


Figure 3: Consent agreement

[Learn more about collecting consent for processing under the GDPR](#)

You can customize your consent messaging on the **Privacy** page.

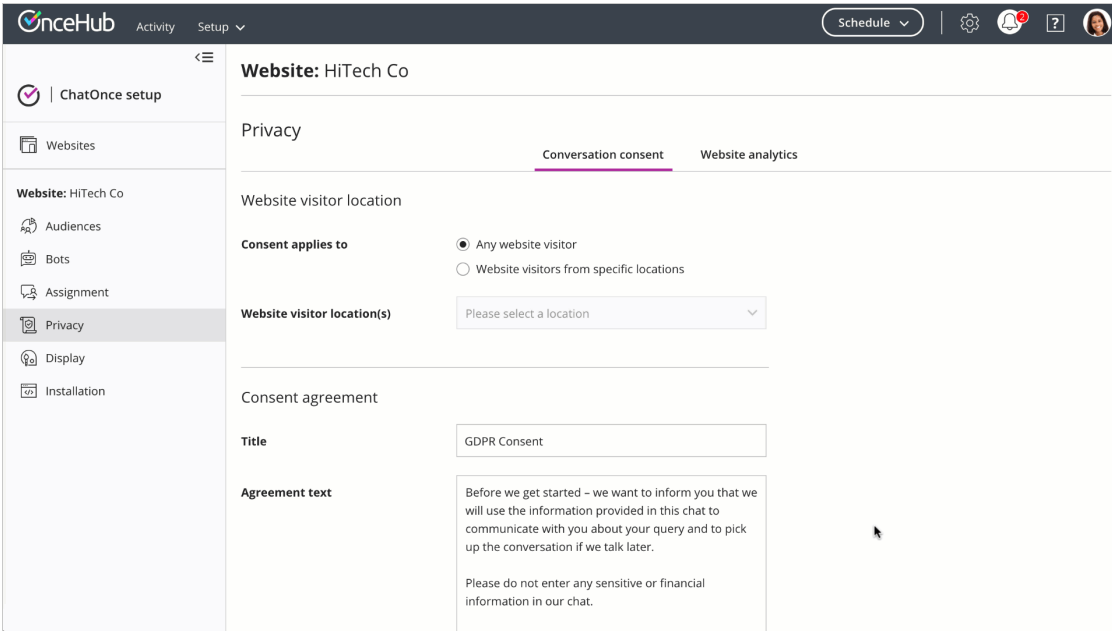


Figure 4: Customize your privacy messaging

Conversation

You can drag and drop the rest of your conversation's interactions into your conversation from the **Add interaction** section on the right (if you click an interaction, it will add to the bottom of the conversation). They will be routed according to the rules you configure (see below).

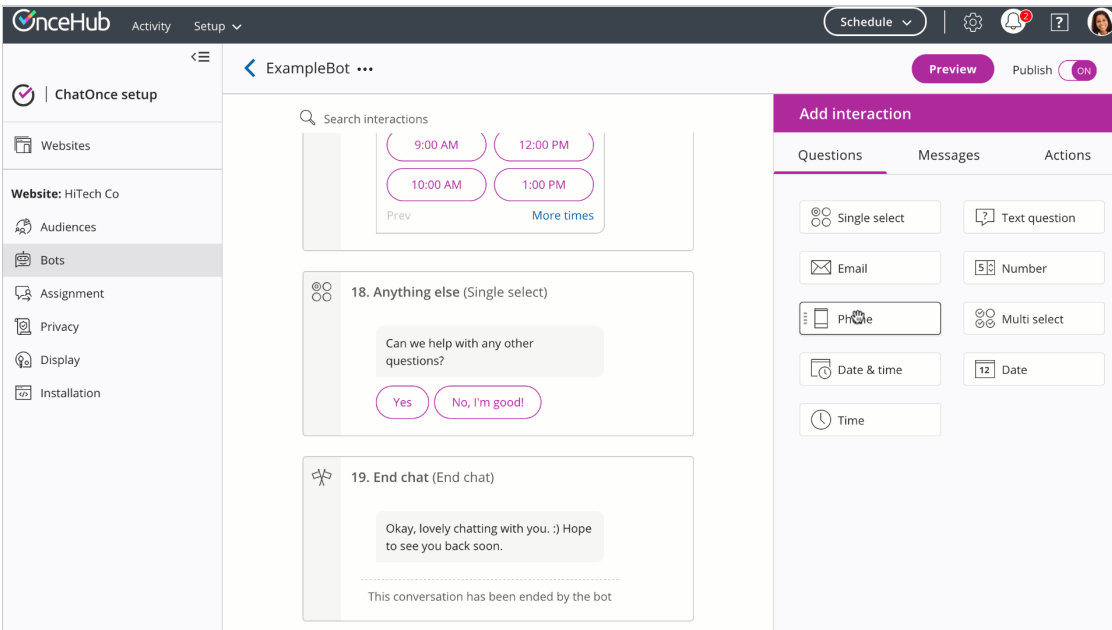


Figure 5: Add interaction - Drag and drop OR click on interaction

Interaction options

Question types

Questions require the visitor to respond before continuing the conversation.

You can choose from various question field types:

- **Single select:** Multiple answer options. The visitor can only select one answer.
- **Text question:** Let the visitor answer in their own words
- **Email:** Request the visitor's email address
- **Number:** The question has a numerical answer. You can define a minimum and maximum amount.
- **Phone:** Request the visitor's phone number.
- **Multi select:** Multiple answer options. The visitor may select one or multiple answers.
- **Date & time:** The question has a date and time (both) for an answer. Optional: Require the date and time to be in the future.
- **Date:** The question has a date for an answer (for example: a birth date).
- **Time:** The question has a time for an answer.

Bot responses

Each question can have a defined bot response after your customer responds, keeping the conversation collaborative and relevant to their answers.

When using the single select or multi select fields, each possible answer can have a unique bot response.

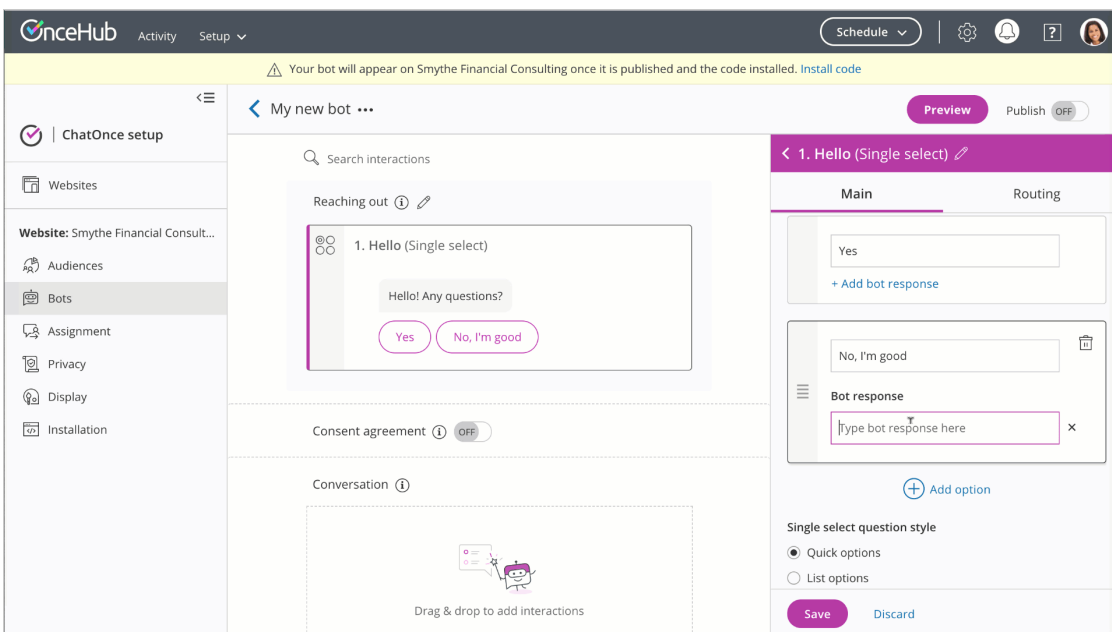


Figure 6: Bot responses

Messages

Messages help you keep your interactions conversational, preventing the visitor from feeling like they're filling out a form. Effectively used message interactions raise the visitor's engagement in the conversation.

You can include various messages in your conversation:

- **Text message:** Inform the visitor of something in a text message interaction, without requiring an answer to continue. For example, you can provide information you've determined is relevant to them, based on their responses to previous questions.

- **Url:** A URL with preview image, prompting them to visit a specific website.
- **Image:** Display an image.
- **Video:** Upload a video they can watch inside the bot widget.
- **Document:** Upload a document they can download from the bot widget.

Actions

- **Schedule:** Offer them to schedule with you, without leaving the chat widget. You can offer scheduling to everyone or only route qualified visitors to this action. [Learn more about offering scheduling](#)
- **Email alert:** Send an internal email alert, invisible to your visitor, when they reach a specific part of the conversation. You can alert people on your team about qualified visitors who answer in a specific way. [Learn more about receiving ChatOnce email alerts](#)
- **Contact status:** Indicate a status (Qualified, Marketing qualified, Sales qualified, or Disqualified) for the contact so you can set other processes in motion on your end based on that status. You can also use this data to optimize your bot flow, determining the efficiency of your campaigns.
- **Live chat:** Offer to chat live with your visitor. The bot will connect them with a member of your team to chat one-on-one and answer their questions or move them to the next step in the sales process.
- **End chat:** End the chat completely. Your bot will not send any more interactions for this conversation.

Info:

Live chat is a new feature. We are releasing it gradually to accounts. If you'd like to try live chat in your ChatOnce account, please contact us: support@oncehub.com

Routing the interactions

You can route your interactions by choosing conditions and deciding what to jump to next.

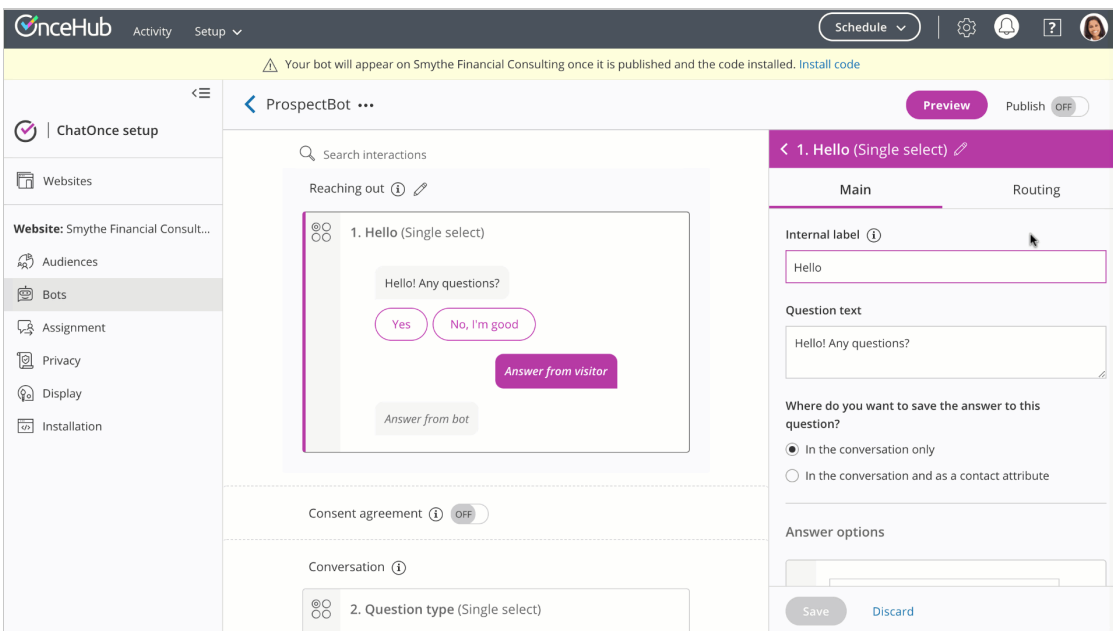


Figure 7: Route to interactions based on rules

You can get really specific about the routing logic you want. The logic can depend on how your visitor answers the current question or a previous one. You can also base the logic on a contact field ChatOnce already saved to their contact record (for instance, the **Company size** field).

[Learn more about routing your interactions](#)

[Learn more about contact fields](#)

Ending the conversation

When you're ready to end the conversation, we always recommend using the **End chat** action. If you do not use this action, the conversation will end abruptly after it reaches its final interaction.

The right farewell message will keep your visitor's ChatOnce experience courteous and enjoyable.
