

Routing your interactions

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You can route your interactions by choosing conditions and deciding what your visitors should see next. Either create your next interaction as you route to it OR route to an interaction you've already created.

You can route to the next interaction in two different ways:

- Always route to specific interaction
- Route to interactions based on rules

If you route based on rules, you have three options:

- Route based on this interaction's answer
- Route based on a previous answer
- Route based on a contact field (for example, their company or team size)

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Note: You cannot route the End action to another interaction.

How can routing be used?

Qualify a website visitor during the conversation

To keep your team working efficiently, you may not want to meet with every website visitor, but may place high value on scheduling a meeting with qualified visitors. You can ask targeted questions in your chatbot's conversation, routing them either to interactions that do not offer scheduling if you determine this is suitable, or to a scheduling or live chat interaction if they do qualify to meet with your team, based on your criteria.

Set the path for the conversation

You can provide the most optimal conversation for a specific website visitor by routing them to the right interactions. This can be based on the options the website visitor selected in a previous or current interaction, or based on information you may already have about them.

Routing options

Your routing rules allow you to specify what happens next in your conversation. Which interaction do your visitors see after this one? This may depend on their answer to this interaction or a previous one, or based on who they are (a saved contact field).

The interaction you route to next can be one you've already created or you can create it on the spot as you route to it.

You have multiple routing options:

- Always route to a specific interaction
- Route to interactions based on rules
 - Evaluate the response of the current interaction
 - Evaluate the response to previous interactions
 - Evaluate the contact fields

You can access your routing by selecting a specific interaction and clicking on the routing tab.

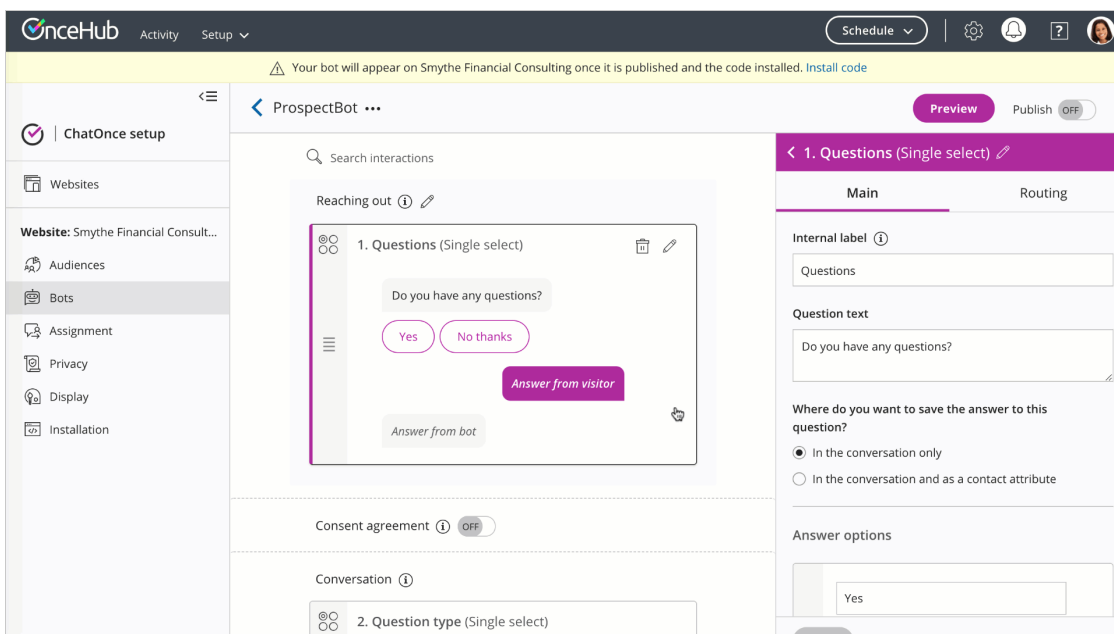


Figure 1: Routing tab

You'll determine what comes next for your visitor by selecting from the options for **After this interaction**.

Always route to specific interaction

If you always want them to see a specific interaction next, no matter the audience's answer, choose **Always route to specific interaction**.

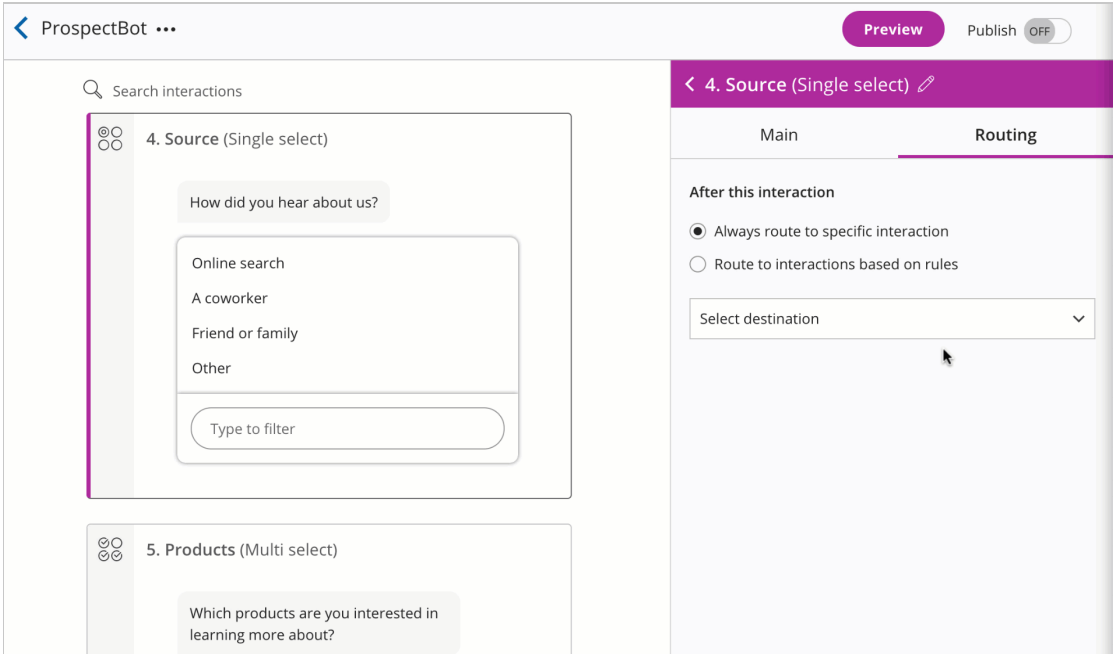


Figure 2: Always route to specific interaction

Route to interactions based on rules

If you'd rather send them down one interaction path if they answer a question a certain way, or another path if they answer differently, select **Route to interactions based on rules**.

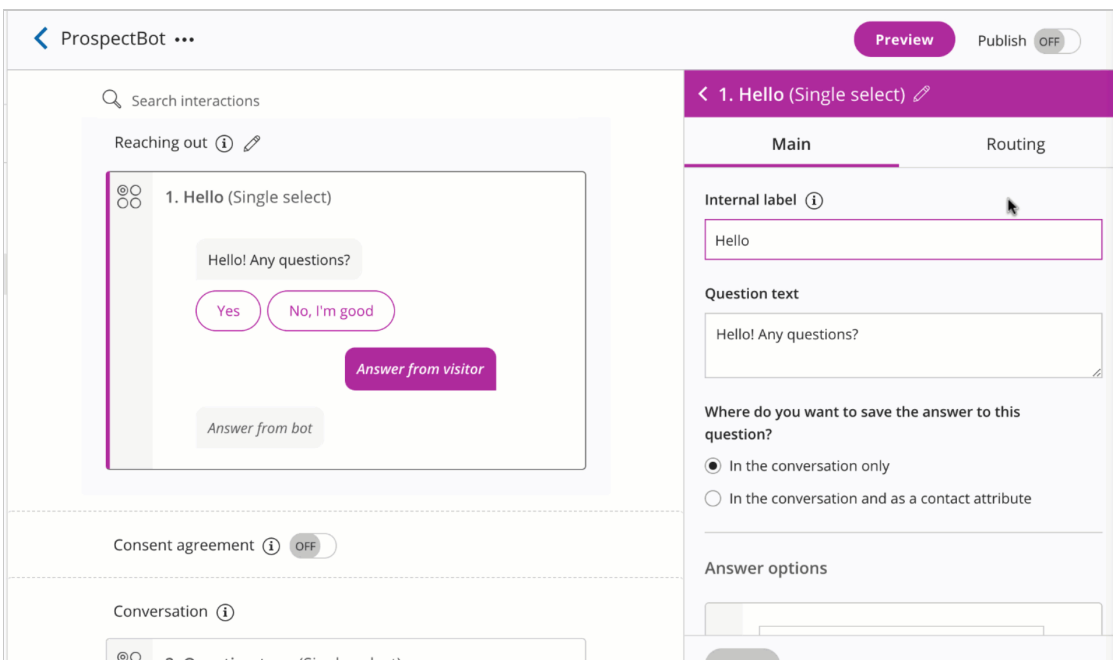


Figure 3: Route to interactions based on rules

This answer

If your next interaction should be based on how they answer the current interaction, select **This answer**. Choose which answer is relevant and select the interaction they should see next based on this (see Figure 3).

If you like, you can route to a different interaction for every possible answer provided.

Previous answer

If your next interaction should be based on how they answered a previous question, select **Previous answer**.

Live chat

You can route to live chat based on the availability of the live chat agents on your team. Simply go to the interaction right before you want to switch to live chat.

In the **Routing** tab, and specify: If **Live chat** has **At least one agent online**. Define the interaction they should be taken to (usually a live chat interaction).

You should also specify in another rule: If **Live chat** has **No agents online**. Define the interaction they should see in that case.

Contact field

If this visitor already had a conversation with your chatbot on a previous visit, you may have saved contact fields from it. You can route to the next interaction based on that saved contact field.

[Learn more about contacts and contact fields](#)

Examples of routing scenarios

Offer to speak with them in live chat

If you want to get in touch with high-quality leads as soon as possible, live chat can provide the experience your visitors desire while reducing your time to engagement. Once you qualify visitors through the chatbot conversation, you can route them to a live chat action, where they will be asked if they'd like to chat live with a team member. This way, you can answer queries immediately from people seriously interested in your product.

You can make this routing dependent on a specific live chat team's availability, so it only suggests live chat when someone on that team is available for chat.

[Learn more about chatting live with your visitors](#)

Company size

Based on a visitor's known company size, you can qualify visitors for scheduling.

If you want to schedule an appointment (sales discussion, demo, consultation, etc.) only with qualified visitors, you can ask targeted questions and route them to an interaction where they are offered to schedule with you.

If they don't meet your organization's qualifications for a scheduled appointment, you can instead route them to an alternative option (recorded demo, help center, etc.).

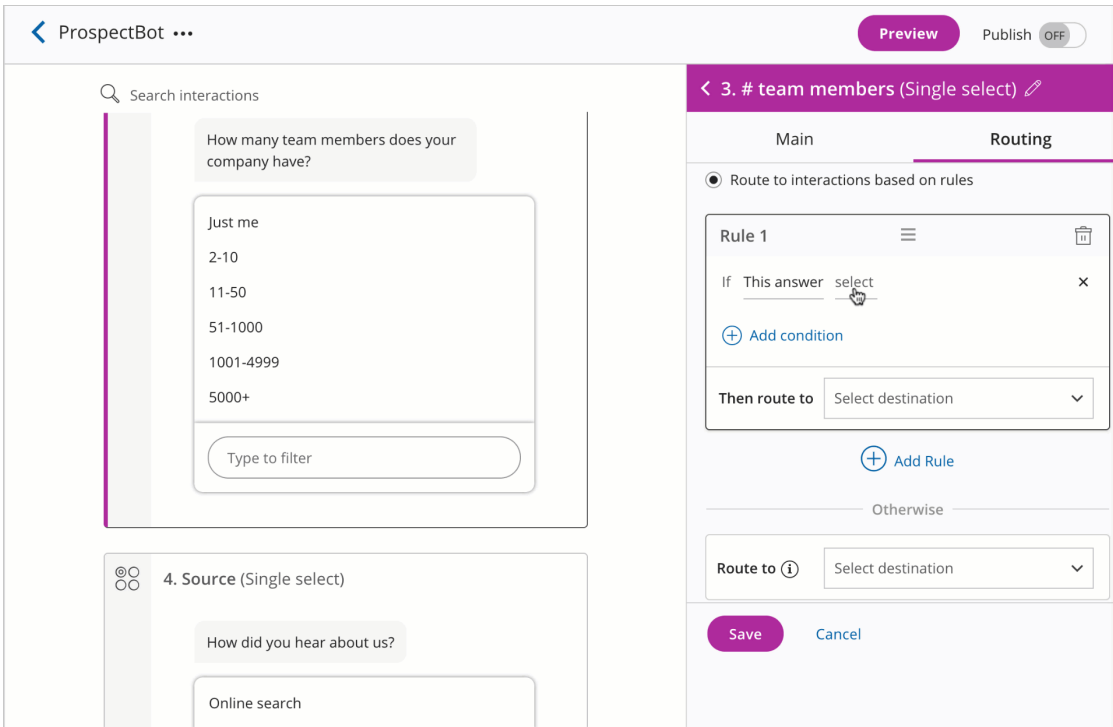


Figure 4: Offer scheduling to qualified visitors

Schedule with the right team

Perhaps your team distributes prospects through regional teams. In this case, you can detect their location and route them directly to schedule with the relevant regional team. This can be based on their country, state, national region, international region, or any other criteria you define.

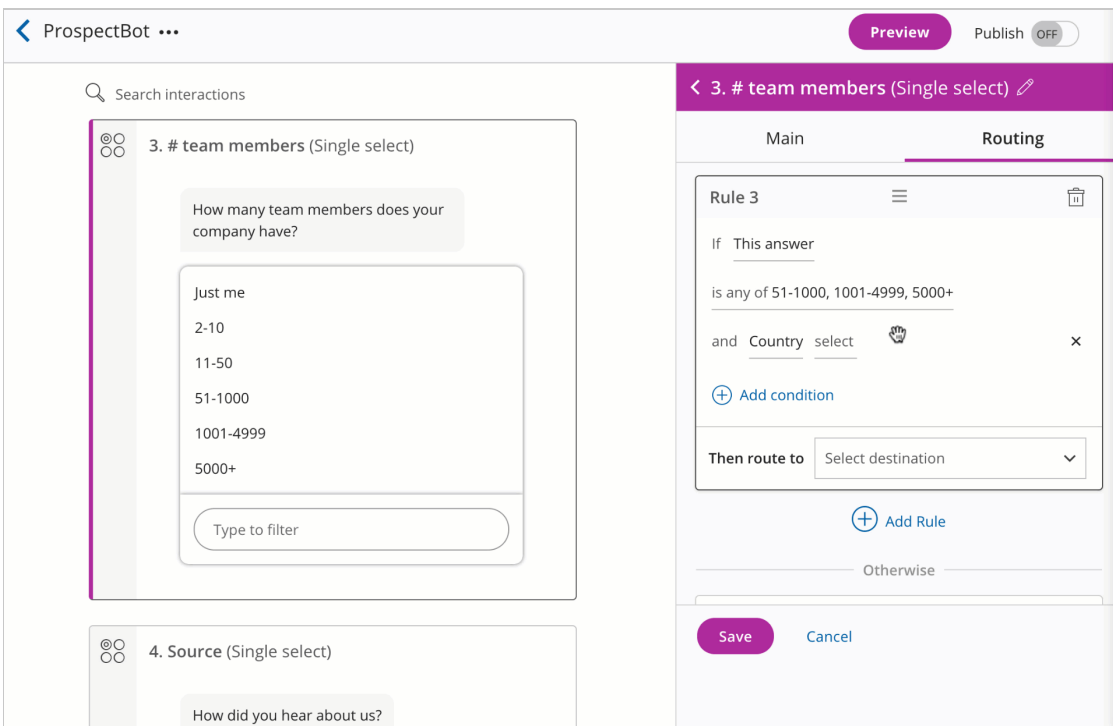


Figure 5: Schedule with a regional team

Send your team an internal email alert

You can add internal email notifications at any point in the conversation so the right people stay updated on your new lead and their engagement with you. The email alert action is 100% internal to your team. Your visitors will not see this interaction on their end and they will not receive any notifications from it.

Route to the email alert action at the right time in the conversation. This may be a critical qualification interaction, such as team size or a specific product they're interested in learning more about.

[Learn more about receiving alerts](#)

Route to different URLs

Depending on an answer, you may wish to provide your visitor with a URL to one site or another. For instance, if you'd like to promote an article published about your business, you can add a URL message linking to it.

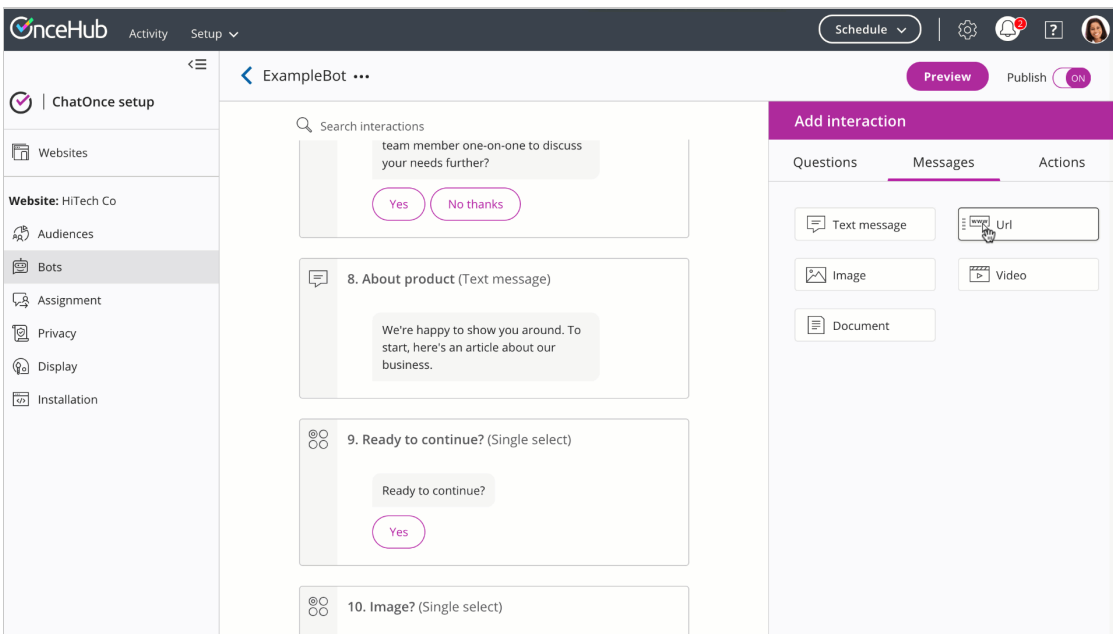


Figure 6: Route to a specific URL based on answer

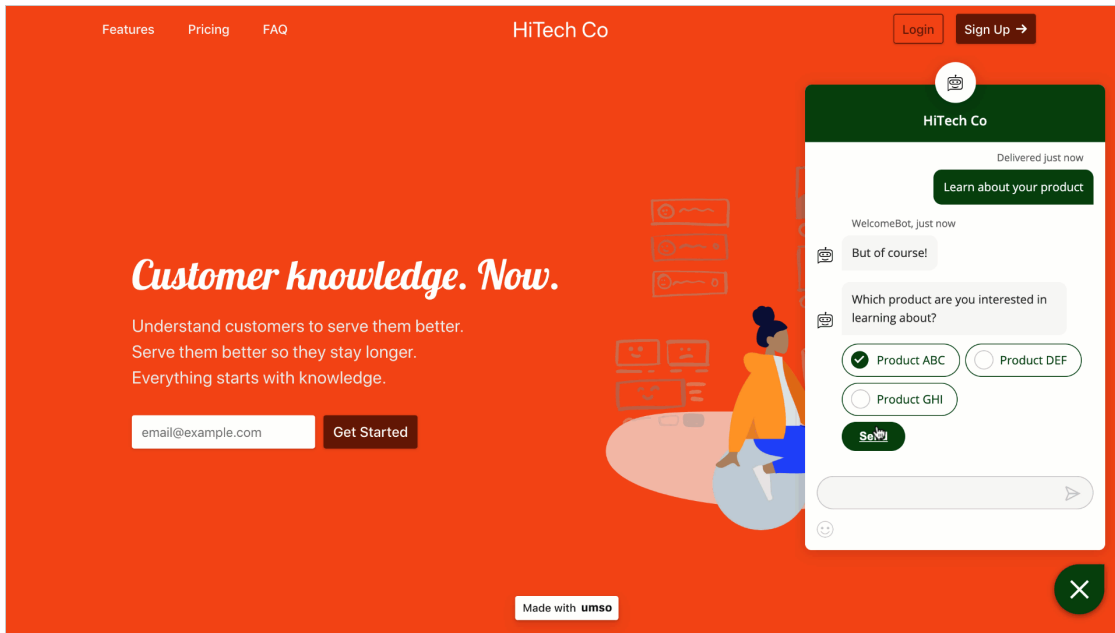


Figure 7: Route to a specific URL - Preview