



5.3 How to Create a Watson Assistant

Bright Pattern Documentation

Generated: 8/12/2022 8:59 am

Content is available under license unless otherwise noted.

Table of Contents

Table of Contents	2
How to Integrate Bots with Chat	3
Prerequisites	3
Procedure	3
Step 1: Create a Watson Assistant in IBM Cloud	3
Step 2: Get Your Watson Credentials	4
Step 3: Add an Integration Account	4
Properties	5
Step 4: Create or Select a Chat Scenario	6
Step 5: Edit the Scenario to Work with Your Bot	8
Step 6: Create or Select a Chat Service	15
Step 7: Create or Choose a Chat Scenario Entry	15
How to Add a New Chat Scenario Entry	16
Required Properties	16
Other Properties	17
Step 8: Edit Chat Widget Style	17
Step 9: Add a Contact Tab	17
Step 10: Get the HTML	17
Final Step: Test the Chat	17
How to Integrate Bots with Chat	19
Prerequisites	20
Procedure	20
Step 1: Create a Watson Assistant in IBM Cloud	20
Step 2: Get Your Watson Credentials	20
Step 3: Add an Integration Account	21
Properties	22
Step 4: Create or Select a Chat Scenario	23
Step 5: Edit the Scenario to Work with Your Bot	24
Step 6: Create or Select a Chat Service	31
Step 7: Create or Choose a Chat Scenario Entry	31
How to Add a New Chat Scenario Entry	32
Required Properties	32
Other Properties	33
Step 8: Edit Chat Widget Style	33
Step 9: Add a Contact Tab	33
Step 10: Get the HTML	33
Final Step: Test the Chat	33

1. REDIRECT [5.3:Tutorials-for-admins/Chat/HowtoConfigureWebChat](#)
1. REDIRECT [5.3:Contact-center-administrator-guide/CallCenterConfiguration/IntegrationAccounts/NaturalLanguageUnderstanding](#)

How to Integrate Bots with Chat

Bright Pattern Contact Center integrates with providers like IBM Watson to enable chatbots to be used in your contact center services. In this article, you will learn how to integrate an IBM Watson Assistant (i.e., a conversational bot) with your configured chat service.

In [How to Configure Web Chat](#), you learned how to set up a chat scenario, chat service, and chat scenario entry point to work together to display a chat widget on your website. A working chat widget connects a customer on a website to a live agent in your contact center.

When a bot is integrated with your chat services, customers can be connected to the bot, which can answer questions, provide assisted self-service, and connect to a live agent if needed. Even if the chat is routed to an agent, the integrated bot still runs in the background, ready to assist the agent by providing suggestions (i.e., suggested responses for the agent to select and use).

Prerequisites

This article assumes that you have:

- Read and understand [How to Configure Web Chat](#)
- Access to your company's IBM Cloud account
- Some understanding of how Watson Assistant works

Procedure

This procedure consists of the following concepts:

- Create a bot in IBM Watson
- Add an IBM Watson integration account
- Create or choose a chat scenario that incorporates bot interactions
- Create or choose a chat service for your bot
- Link the chat scenario and service to your integration account
- Test the chat

Step 1: Create a Watson Assistant in IBM Cloud

1. If you haven't already done so, sign up for an IBM account and launch IBM Cloud. IBM Cloud is the application

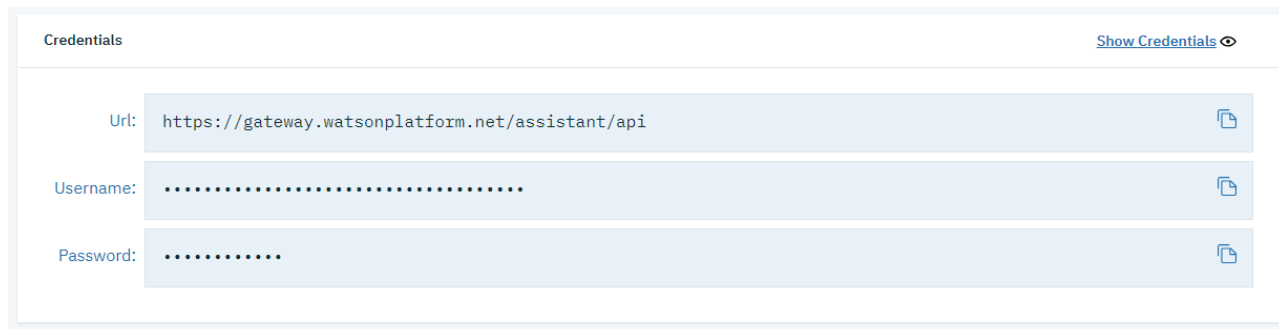
where you will be developing and managing resources like Watson Assistant chatbots.

2. Follow all the steps in [IBM's Getting Started tutorial](#) in order to create a Watson Assistant instance. The Watson Assistant will be your bot, and you will be adding intents, entities, and a dialog to it in a workspace. For more information on Watson Assistant, see [IBM's API Reference](#).
3. You can also read our basic guidelines in [How to Create a Watson Assistant](#).

Step 2: Get Your Watson Credentials

Your credentials are necessary for integrating Bright Pattern Contact Center with your Watson Assistant. You will be using these credentials in later steps to add an integration account.

1. In your IBM Cloud console, get your Watson Assistant credentials from either of these two places:
 1. *Watson Services > Assistant > Manage* (for credentials in plain text)
 2. *Watson Services > Assistant > Service Credentials* (for JSON snippet)
2. Copy the **Url**, **Username**, and **Password** for your Watson Assistant to a separate doc, such as a text file.

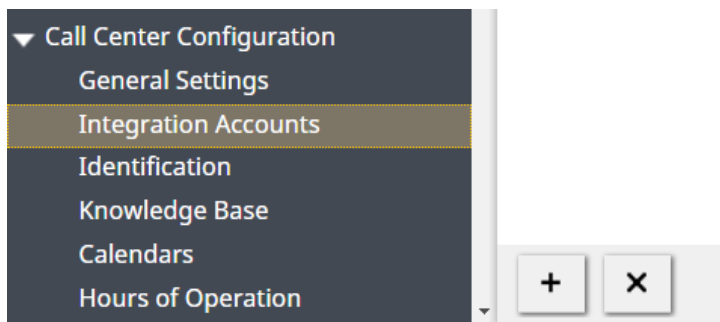


Watson Assistant credentials

Step 3: Add an Integration Account

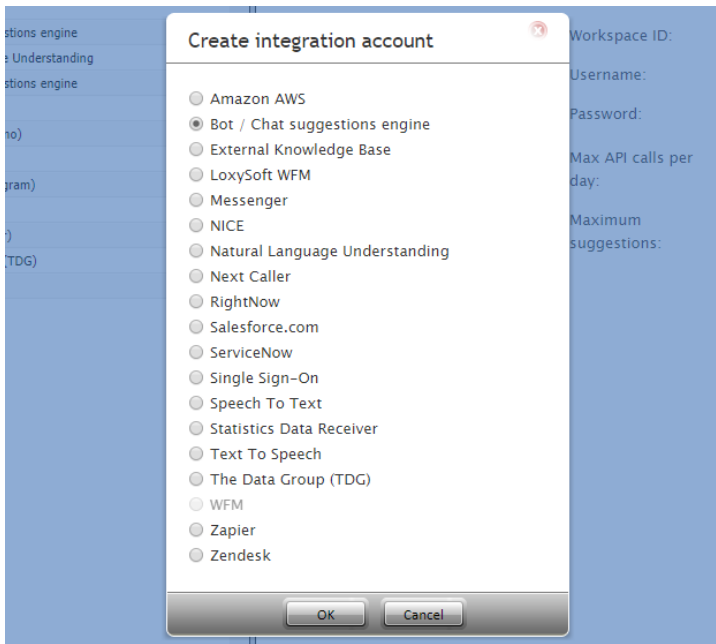
Integration accounts are what allow your contact center to operate with third-party services.

1. In the Contact Center Administrator application, go to *Call Center Configuration > Integrations Accounts*.
2. Click the **Add account (+)** button to add a new integration account.



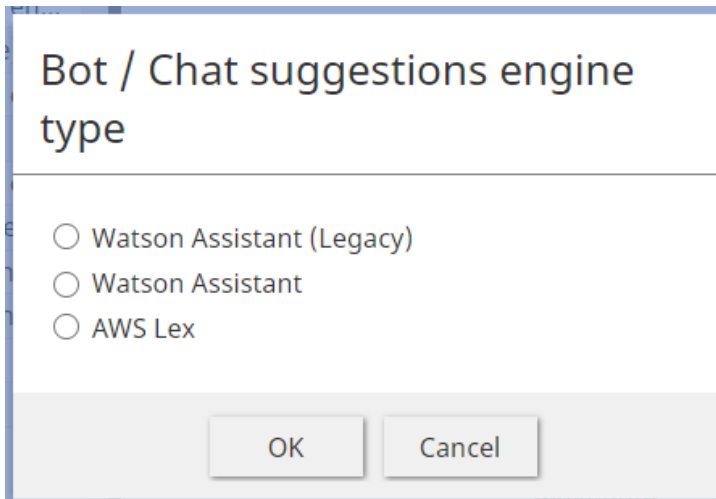
Add new integration account

3. Select account type **Bot / Chat suggestions engine** and click **OK**.



Select "Bot / Chat suggestions engine"

4. In the *Bot / Chat suggestions engine type* dialog, select your Watson Assistant type and click **OK**.



Properties

Properties

Name:	<input type="text" value="Helper Bot Product Returns"/>
Type	Watson Assistant
Url:	<input type="text" value="https://gateway.watsonplatform.net/assistant/api/v1/workspaces/12c3a41e-ad2e-341c-12d3-412341ffdfdf/message"/>
Skill ID:	<input type="text" value="dd1db234-a12d-3cf4-abf1-d234068"/>
API key:	<input type="password" value="●●●●●●"/>
Max API calls per day:	<input type="text" value="1000"/>
Maximum suggestions:	<input type="text" value="3"/>
<input type="button" value="Test Connection"/>	

Example of Watson Assistant integration account properties

Fill in all [Watson Assistant properties](#) or [Watson Assistant \(Legacy\) properties](#).

Click **Apply** at the bottom of the screen to save your account properties.

Step 4: Create or Select a Chat Scenario

Note that this step is the same as [Web Chat Configuration Step 1](#).

1. Go to *Configuration > Scenarios > [Chat](#)*.

Chat >> Chat >> Mobile Chat

Scenario Name	Edited By	Edited On	Name	Service
After-Hours Chat	beth	9/14/20, 5:21 PM	Chat with a bot	Customer Service Chat
Bot Scenario	admin	8/6/20, 12:36 AM	Messenger Chat	Customer Service Chat
LINE Basic Chat	beth	9/15/20, 8:52 PM	Support	Customer Service Chat
Lambda Test Scenario	beth	8/28/20, 8:11 PM		
Lambda-AB	beth	8/21/20, 8:40 PM		
LambdaChat	beth	8/28/20, 9:12 PM		
Lex Bot Scenario	admin	8/6/20, 7:15 PM		
Mobile Chat	admin	9/9/20, 10:00 PM		

Scenario Entry name: Chat with a bot

Unique identifier: eef2fb2f37ce4e0aa6a498c719d1e04


Scenario: Mobile Chat

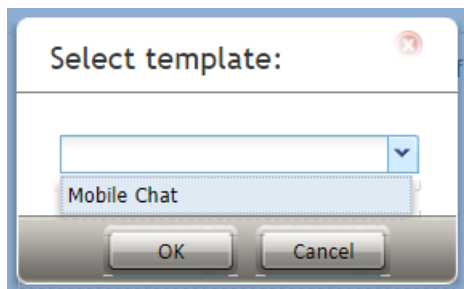
Service: Customer Service Chat [add/edit](#)

Default service for voice callback: Customer Service [add/edit](#)

Merge sessions for identified contacts:

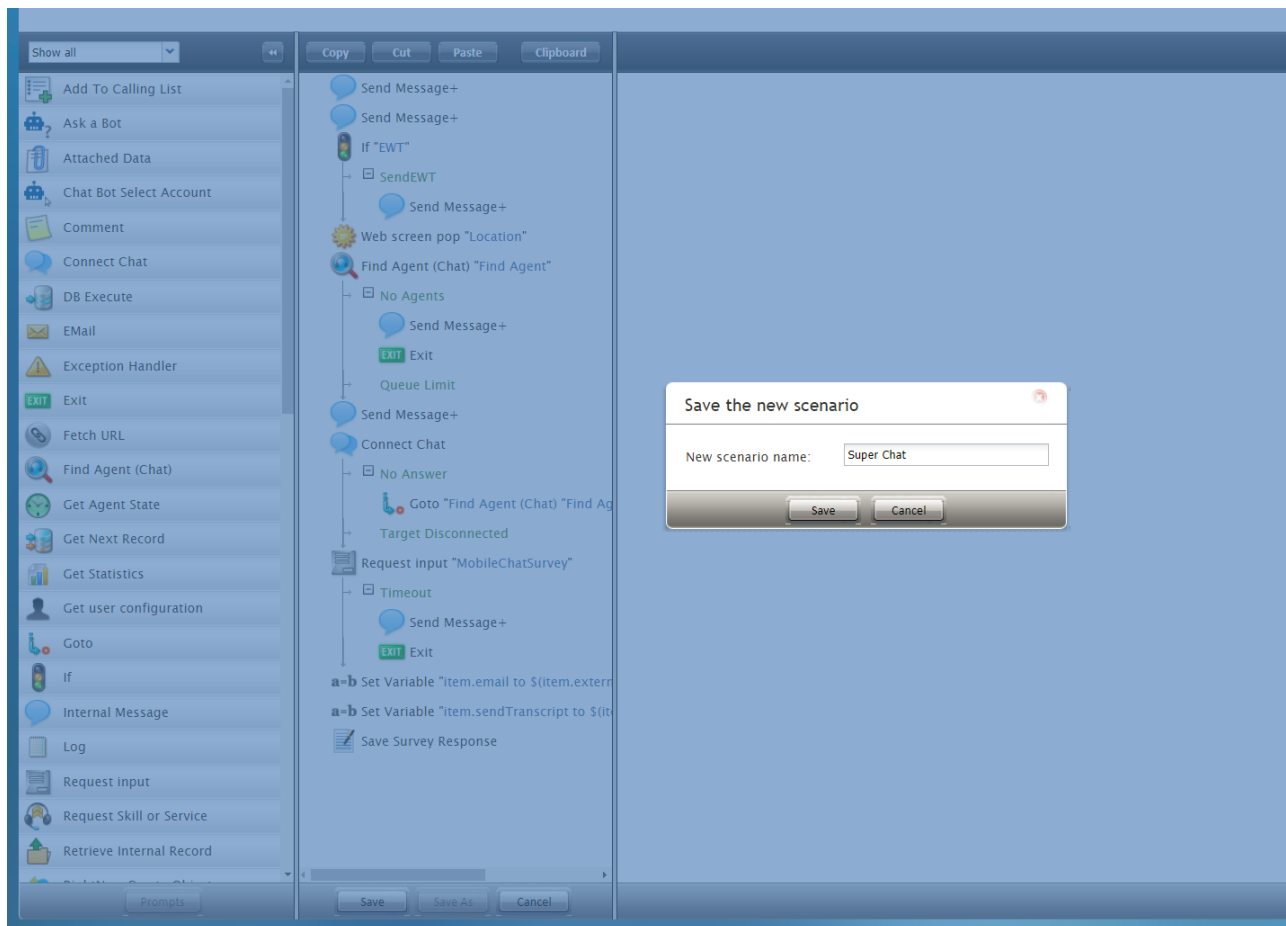
Configuration > Scenarios > Chat

2. Either select an existing Chat Scenario from the list, or click the **Add from template**  button at the bottom of the screen to create a new chat scenario from the "Mobile Chat" template.



Select the "Mobile Chat" template

3. Creating a new chat scenario from a template will open the Scenario Builder application in a new browser tab or window. For the purpose of this simple setup, leave the scenario as-is and click **Save**.



Name the scenario

4. Give the scenario a unique name (e.g., "Bot Scenario") and click **Save**. Your new scenario will appear in the list of scenarios.

Step 5: Edit the Scenario to Work with Your Bot

To use the Watson Assistant in live web chat interactions, you'll have to edit the basic Mobile Chat scenario template to allow the bot to interact with the customer. For more information about scenarios, see the [Scenario Builder Reference Guide](#).

There are many ways to construct such a bot-enabled scenario; the instructions given in this step are provided as just one example of how to use your Watson Assistant in chat.

In this scenario-building exercise, you will be configuring the system to use the bot to:

- Automatically accept the customer's chat request
- Greet the customer
- Provide answers to the customer
- Provide suggested replies to the agent
- Connect to an agent when it's determined that the bot is not being helpful



Example chat scenario in Scenario Builder

1. Download [File:App Example Bot Scenario.zip](#) and import it to your Contact Center Administrator application.
2. Select the imported scenario and click **EDIT** to open it.

The following scenario blocks (with comments) are included in this example scenario. Be sure to read the comments that explain each scenario block's properties.

1. **Chat Bot Select Account:** This block tells the system which integrated bot will be used for this scenario.

Chat Bot Select Account

This block selects Chat Bot account to be used by Ask a Bot

Title text:

Account:

Bad Bot ▼

Bad Bot

Dental Bot

Helper Bot Product Returns

Lex Flower

Select an integration account

2. **Set Variable:** This establishes the customer's first name and last name. Setting this context helps to personalize the conversation.

Set Variable

Scenario has variables. The block sets a variable to a value. You may use `$(VarName)` in the value field to substitute other variable values.

Variable name:

Value:

`$(item.externalChatData.first_name)`
`$(item.externalChatData.last_name)`

Use a variable to get the customer's name from the pre-chat form and use it in the chat interaction

3. **Send Message+:** This block delivers a chat message to the customer, incorporating the customer's name.

Send Message+

Send SMS or a message to chat customer

Media type CHAT SMS

Message:

```
Hi
$(item.externalChatData.first_name),
I'm a virtual assistant. How can I
help you?
```

Wait for text input:

Result variable name:

Timeout after, sec:

Have the bot send a message to the customer, addressing him/her by name

4. **Set Variable:** This time, we are defining a step. In this example scenario, we want the bot to respond to the customer two times before connecting to the agent. The first time is specified as "step 0" and the second time is specified as "step 1." The scenario will run through both steps. If the customer's issue is not resolved by step 1, the customer is transferred to the agent for help.

Set Variable

Scenario has variables. The block sets a variable to a value. You may use `$(VarName)` in the value field to substitute other variable values.

Variable name:

Value:

Use a variable to define this part as the first in a series of steps

5. **If:** The If block specifies what happens if the customer did not write a message in the pre-chat form's Message field. If that field is empty, the scenario tells the bot to send a message. The message aligns with what you have configured your Watson Assistant to say. We call the bot's messages suggestions.
 1. Add a branch
 2. Give it a condition of item.message is empty

If

Allows branching scenario on conditions. Can have a number of conditions with associated branches.

Title text:

Branch1

Exit label:

"item.message" is empty
[add condition](#) [add block](#)

If the customer's message is empty, have the bot send a message to the customer

6. **Ask a Bot:** The scenario uses this block to get suggestions (i.e., some response from the Watson Assistant) to deliver to the customer. For each of the conditional exits (Failed, Timeout, or No Data), the scenario will send a message and then connect to the agent.

Ask a Bot

This block requests suggestions for text message from chat suggestions engine

Title text:

Message:
Message text (last received message by default)

Suggestions:
Variable receiving array of suggested responses

Response:
Variable receiving raw bot response

Timeout after, sec:

Get suggestions from the bot

7. **Send Message+:** This is used to send a message to the customer via either chat or SMS. In this example, the message is sent in the active chat interaction. If a specific message is not defined here, the standard system-wide message is sent to the customer.

Send Message+

Send SMS or a message to chat customer

Media type CHAT SMS

Message:

Wait for text input:

Result variable name:

Timeout after, sec:

Send another message if you want

8. **Set Variable:** This time, we are defining "step 1." Remember, we want the bot to respond to the customer two times before connecting to the agent. The first time is specified as "step 0" and the second time is specified as "step 1." The scenario will run through both steps. If the customer's issue is not resolved by step 1, the customer is transferred to the agent for help.

Set Variable

Scenario has variables. The block sets a variable to a value. You may use `$(VarName)` in the value field to substitute other variable values.

Variable name:

Value:

Define this part as step 1

9. **If:** In this If block, a condition is set to make sure that if the scenario takes more than two steps to resolve the customer's issue, then it will transfer the chat from the bot to the agent.
 1. Add a branch
 2. Give it a condition of "steps" > "2"

If

Allows branching scenario on conditions. Can have a number of conditions with associated branches.

Title text:

Branch1

Exit label:

"steps" > "2" (number)
[add condition](#) [add block](#)

If the scenario takes more than two steps to resolve the customer's issue, then the agent steps in

10. **Find Agent:** The Find Agent block looks for the next available skilled agent to accept the chat. You can use Find Agent to set wait times and send the customer messages about estimated waiting time (EWT).

Find Agent (Chat)

The block finds the best matching agent for the interaction according to requested skills. Agent's login handle is saved in "Destination" variable. Use Connect Chat block to connect to the agent.

Title text:

Agent skills required

Wait condition

Wait time **Wait condition**

0 - 600 sec

[add Interval](#)

Overflow call handling starts at: Never

Initial Message:

Periodic Message:

Repeat every: seconds

The bot couldn't resolve the customer in two steps, so the scenario looks for an agent

11. **Connect Chat:** Connect Chat is for setting the destination of the chat. If you leave the destination fields empty, the Find Agent block will find the first available agent.

Connect Chat

Connects chat to an agent found by preceding Find Agent block, or to pre-selected chat Scenario Entry.

Title text:

Destination

Default Destination:

Chat Scenario entry to connect to if no agents were returned by Find Agent block

Override Destination:

Chat Scenario entry to connect chat in all cases, ignoring agent possibly found by Find Agent block

- Mark all interactions connected by this block as overflow

Options

No Answer Timeout:

 seconds

Auto-answer in:

 seconds (leave empty to turn auto-answer off)

You can either specify a destination for the chat or let the system find the next available agent

12. **Exit:** The Exit block completes the scenario. Without it, the scenario will loop through this configured flow until the customer ends the chat.

Step 6: Create or Select a Chat Service

See [Web Chat Configuration Step 2](#).

Step 7: Create or Choose a Chat Scenario Entry

Note that this step is basically the same as [Web Chat Configuration Step 3](#), with the addition of another important property.

1. Go to *Configuration > Scenario Entries > [Messaging/Chat](#)* and select a scenario entry point to use with your chat scenario. The entry point is what starts the scenario.

The screenshot shows the 'Messaging/Chat >> Chat with a bot >> Properties' configuration page. On the left is a navigation tree with 'Messaging/Chat' selected. The main area is split into two panes. The left pane shows a table of scenario entries:

Name	Scenario	Unique identifier
Chat with a bot	Mobile Chat	eef2fb2f37ce4e0...
LambdaChat	LambdaChat	9700f6fc332b45...
LINE Chat	LINE Basic Chat	06f08cc3d82940...
Messenger Chat	Mobile Chat	aa255cbe62a04a...
Support	Mobile Chat	b797c44d-e35b-...

The right pane shows the 'Properties' tab for the selected 'Chat with a bot' entry:

- Scenario Entry name: Chat with a bot
- Unique identifier: eef2fb2f37ce4e0aa6a498c719d1e04
- Scenario: Mobile Chat (with [add/edit](#) link)
- Service: Customer Service Chat (with [add/edit](#) link)
- Default service for voice callback: Customer Service (with [add/edit](#) link)
- Merge sessions for identified contacts:
- Hours of Operation: from service select specify
- Hours of operation will be taken from the service that is active at the moment.
- Web HTML snippet: HTML snippet (button)
- Full chat code for local hosting: Download (button)

At the bottom right are 'Apply' and 'Reset' buttons.

Messaging/Chat scenario entries list

2. If there are no existing chat scenario entries shown, you have to create one.

How to Add a New Chat Scenario Entry

1. Click the **Add chat scenario entry** button.
2. In the Properties tab, fill in the properties as appropriate (see below for required and optional properties). For definitions, see the *Contact Center Administrator Guide*, section [Messaging/Chat](#).

Required Properties

In the Properties tab, make sure to address the following fields right now. These are critical to chat configuration.

The screenshot shows the 'Properties' tab with the following fields:

- Name: Redwood Chat
- Unique identifier: f6e8dea10754493c9b3564208b308bc
- Scenario: Super Chat (with [add/edit](#) link)
- Service: Pacific Chat (with [add/edit](#) link)

Messaging/Chat scenario entry properties that you need to address for chat to work

- **Name** - The unique name (any) of the chat scenario entry (e.g., "Redwood Chat")
- **Unique identifier** - A long string of characters that identifies the chat entry. It is recommended that you change it to something short and unique (e.g., "1234").

- **Scenario** - Choose the Chat Scenario you selected or created earlier in this procedure (e.g., "Super Chat"). This is where the parts come together to make chat possible.
- **Service** - Choose the Chat Service you selected or created earlier in this procedure (e.g., "Pacific Chat"). This is where the parts come together to make chat possible.
- **Bot / Chat suggestions engine** - The engine that will provide suggested replies to the agent during chat. Note that in order to use a bot/chat suggestions engine, you must have an integration account configured for your contact center.

Other Properties

The [other remaining properties](#) are optional at this time. You can come back to them later.

Step 8: Edit Chat Widget Style

See [Web Chat Configuration Step 4](#)

Step 9: Add a Contact Tab

In order for this chat scenario entry to work, you must add a contact tab for the chat widget. See [How to Add a Contact Tab](#).

Step 10: Get the HTML

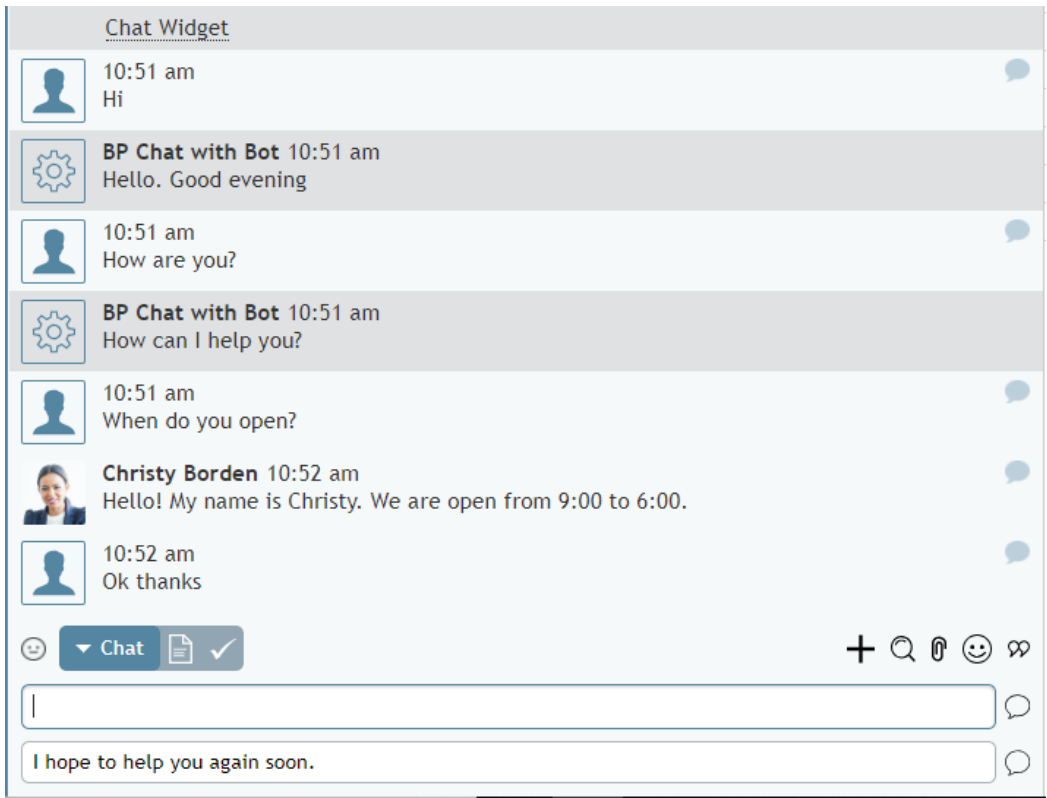
See [Web Chat Configuration Step 6](#)

Final Step: Test the Chat

You have now successfully set up your contact center service, scenario, and chat widget to work in an integrated manner with your Watson Assistant. You should test it to make sure that the:

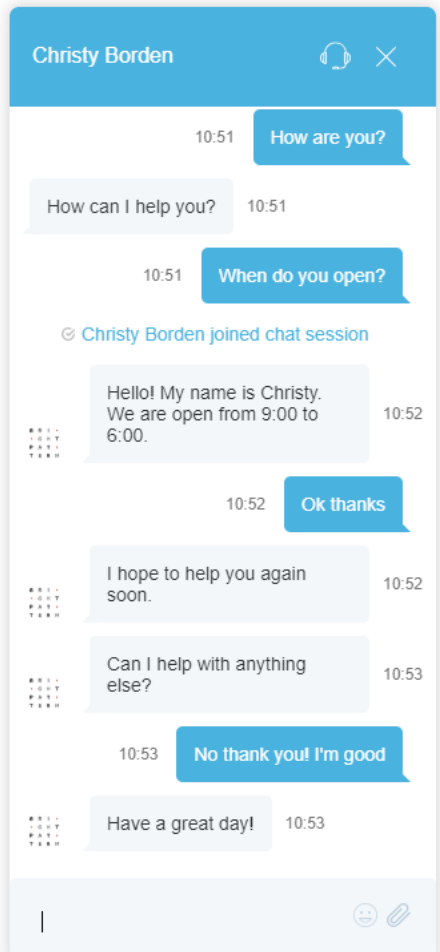
- Customer's name entered on the pre-chat form comes through during the chat
- Bot is able to automate the conversation with the customer
- Customer is connected to an agent if the bot couldn't help within two tries
- Agent is able to see the bot's suggestions during the active chat

The following screenshot shows a service chat (on the Agent Desktop side) where the bot provides two responses to the customer and then connects to an agent. You can see the bot's suggestion below the agent's text input field.



Example chat as seen on Agent Desktop

And the following is how the chat looks to the customer:



Example chat as seen by customer on webpage

1. REDIRECT [5.3:Contact-center-administrator-guide/CallCenterConfiguration/IntegrationAccounts/BotChatSuggestionsEngine](#)
1. REDIRECT [5.3:Scenario-builder-reference-guide/Exercises/HowtoCreateChatScenarioThatUsesBots](#)

How to Integrate Bots with Chat

Bright Pattern Contact Center integrates with providers like IBM Watson to enable chatbots to be used in your contact center services. In this article, you will learn how to integrate an IBM Watson Assistant (i.e., a conversational bot) with your configured chat service.

In [How to Configure Web Chat](#), you learned how to set up a chat scenario, chat service, and chat scenario entry point to work together to display a chat widget on your website. A working chat widget connects a customer on a website to a live agent in your contact center.

When a bot is integrated with your chat services, customers can be connected to the bot, which can answer questions, provide assisted self-service, and connect to a live agent if needed. Even if the chat is routed to an agent, the integrated bot still runs in the background, ready to assist the agent by providing suggestions (i.e., suggested responses for the agent to select and use).

Prerequisites

This article assumes that you have:

- Read and understand [How to Configure Web Chat](#)
- Access to your company's IBM Cloud account
- Some understanding of how Watson Assistant works

Procedure

This procedure consists of the following concepts:

- Create a bot in IBM Watson
- Add an IBM Watson integration account
- Create or choose a chat scenario that incorporates bot interactions
- Create or choose a chat service for your bot
- Link the chat scenario and service to your integration account
- Test the chat

Step 1: Create a Watson Assistant in IBM Cloud

1. If you haven't already done so, sign up for an IBM account and launch IBM Cloud. IBM Cloud is the application where you will be developing and managing resources like Watson Assistant chatbots.
2. Follow all the steps in [IBM's Getting Started tutorial](#) in order to create a Watson Assistant instance. The Watson Assistant will be your bot, and you will be adding intents, entities, and a dialog to it in a workspace. For more information on Watson Assistant, see [IBM's API Reference](#).
3. You can also read our basic guidelines in [How to Create a Watson Assistant](#).

Step 2: Get Your Watson Credentials

Your credentials are necessary for integrating Bright Pattern Contact Center with your Watson Assistant. You will be using these credentials in later steps to add an integration account.

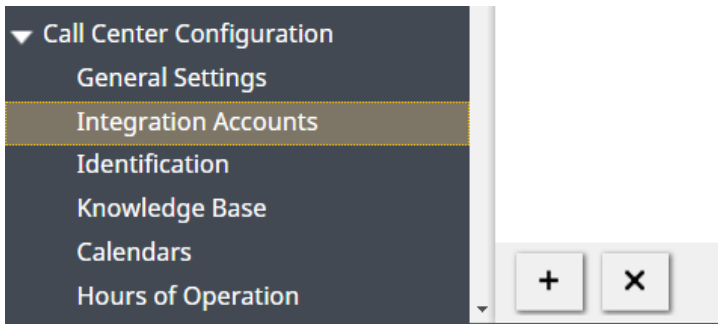
1. In your IBM Cloud console, get your Watson Assistant credentials from either of these two places:
 1. *Watson Services > Assistant > Manage* (for credentials in plain text)
 2. *Watson Services > Assistant > Service Credentials* (for JSON snippet)
2. Copy the **Url**, **Username**, and **Password** for your Watson Assistant to a separate doc, such as a text file.

Watson Assistant credentials

Step 3: Add an Integration Account

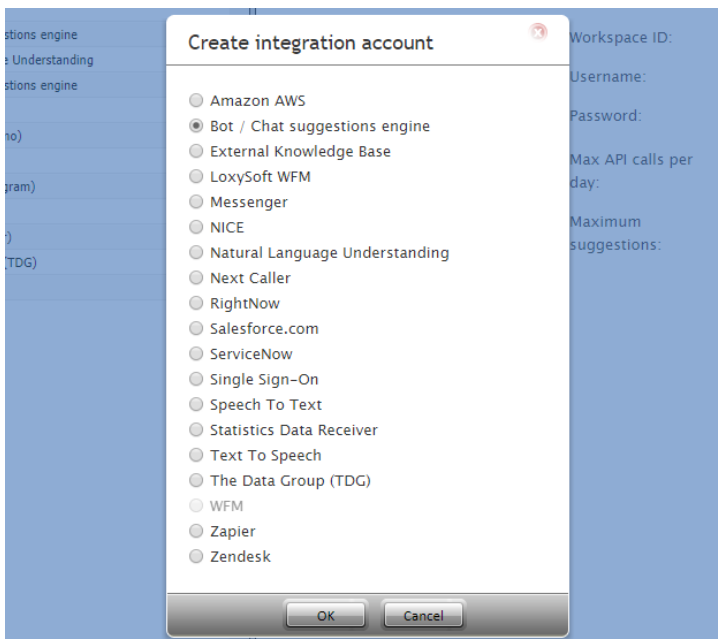
Integration accounts are what allow your contact center to operate with third-party services.

1. In the Contact Center Administrator application, go to *Call Center Configuration > Integrations Accounts*.
2. Click the **Add account (+)** button to add a new integration account.



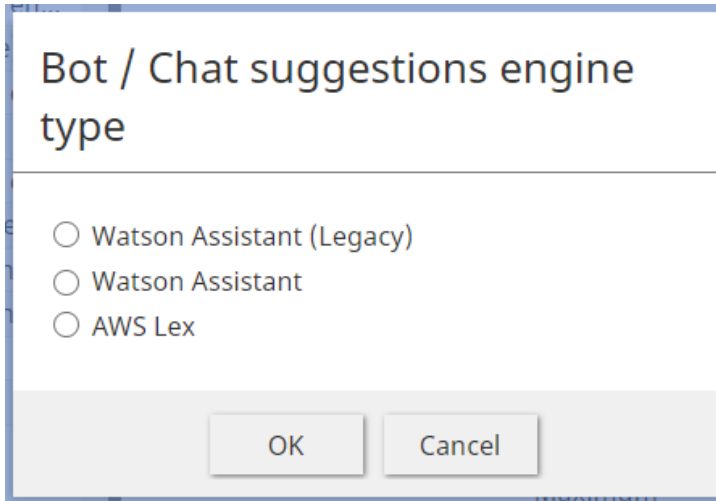
Add new integration account

3. Select account type **Bot / Chat suggestions engine** and click **OK**.



Select "Bot / Chat suggestions engine"

4. In the *Bot / Chat suggestions engine type* dialog, select your Watson Assistant type and click **OK**.



Properties

Properties

Name:

Type: Watson Assistant

Url:

Skill ID:

API key:

Max API calls per day:

Maximum suggestions:

Example of Watson Assistant integration account properties

Fill in all [Watson Assistant properties](#) or [Watson Assistant \(Legacy\) properties](#).

Click **Apply** at the bottom of the screen to save your account properties.

Step 4: Create or Select a Chat Scenario

Note that this step is the same as [Web Chat Configuration Step 1](#).

1. Go to *Configuration > Scenarios > Chat*.

The screenshot shows the configuration interface for Chat Scenarios. On the left is a navigation menu with options like Dial-in, Messaging/Chat, Web Callback, Email, Scenarios, Voice, Chat, Workflows, Services & Campaigns, Lists, Do Not Call Lists, Tasks, Case & Contact Management, and Call Center Configuration. The main area is titled 'Chat >> Chat >> Mobile Chat' and contains a table of scenario entries and a configuration form.


Scenario Name	Edited By	Edited On
After-Hours Chat	beth	9/14/20, 5:21 PM
Bot Scenario	admin	8/6/20, 12:36 AM
LINE Basic Chat	beth	9/15/20, 8:52 PM
Lambda Test Scenario	beth	8/28/20, 8:11 PM
Lambda-AB	beth	8/21/20, 8:40 PM
LambdaChat	beth	8/28/20, 9:12 PM
Lex Bot Scenario	admin	8/6/20, 7:15 PM
Mobile Chat	admin	9/9/20, 10:00 PM

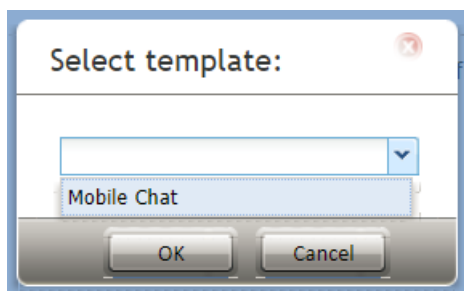
Name	Service
Chat with a bot	Customer Service Chat
Messenger Chat	Customer Service Chat
Support	Customer Service Chat

Configuration form fields:

- Scenario Entry name: Chat with a bot
- Unique identifier: eef2fb2f37ce4e0aa6a498c719d1e04
- Scenario: Mobile Chat
- Service: Customer Service Chat (add/edit)
- Default service for voice callback: Customer Service (add/edit)
- Merge sessions for identified contacts:

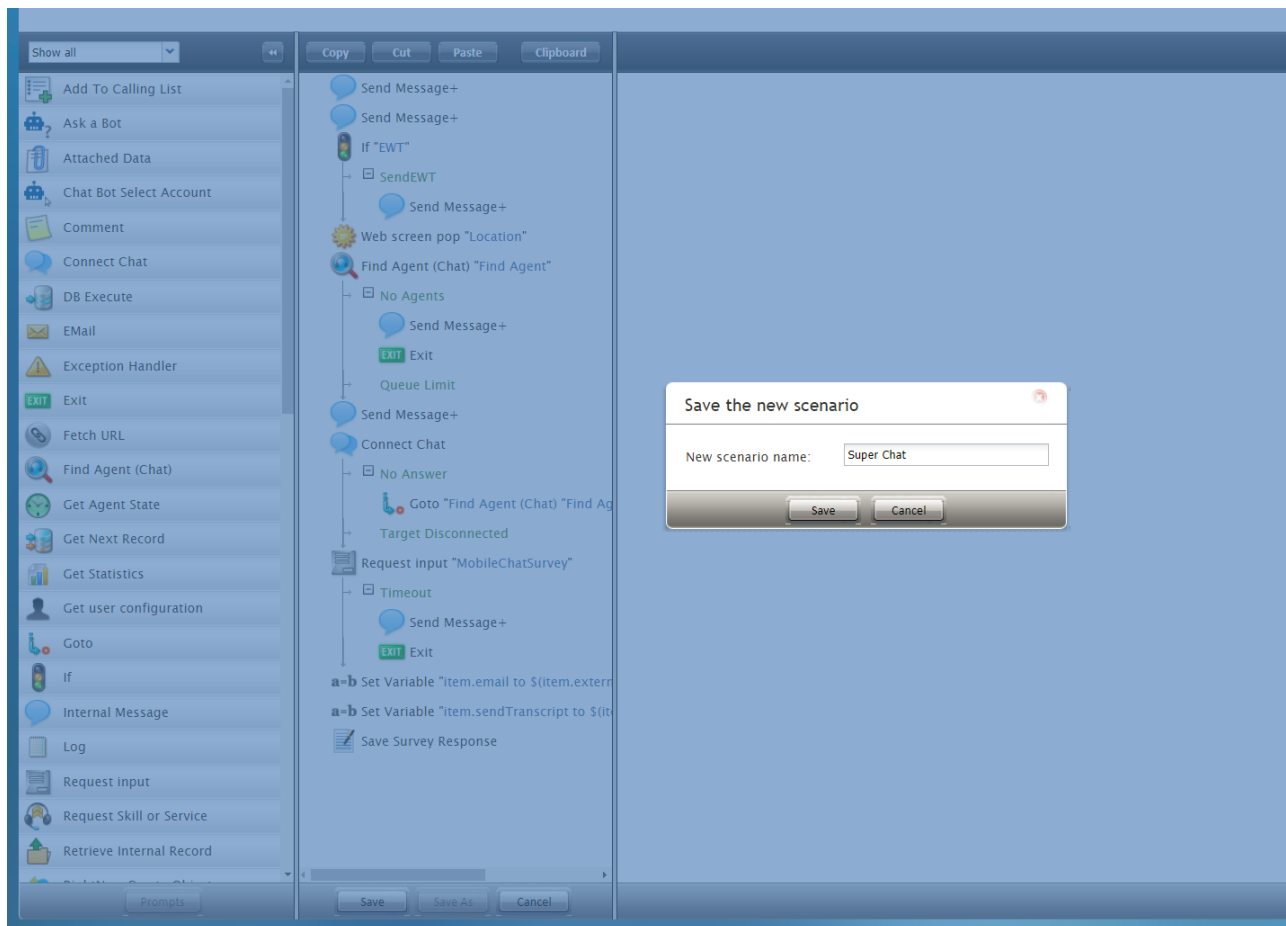
Configuration > Scenarios > Chat

2. Either select an existing Chat Scenario from the list, or click the **Add from template**  button at the bottom of the screen to create a new chat scenario from the "Mobile Chat" template.



Select the "Mobile Chat" template

3. Creating a new chat scenario from a template will open the Scenario Builder application in a new browser tab or window. For the purpose of this simple setup, leave the scenario as-is and click **Save**.



Name the scenario

4. Give the scenario a unique name (e.g., "Bot Scenario") and click **Save**. Your new scenario will appear in the list of scenarios.

Step 5: Edit the Scenario to Work with Your Bot

To use the Watson Assistant in live web chat interactions, you'll have to edit the basic Mobile Chat scenario template to allow the bot to interact with the customer. For more information about scenarios, see the [Scenario Builder Reference Guide](#).

There are many ways to construct such a bot-enabled scenario; the instructions given in this step are provided as just one example of how to use your Watson Assistant in chat.

In this scenario-building exercise, you will be configuring the system to use the bot to:

- Automatically accept the customer's chat request
- Greet the customer
- Provide answers to the customer
- Provide suggested replies to the agent
- Connect to an agent when it's determined that the bot is not being helpful



Example chat scenario in Scenario Builder

1. Download [File:App Example Bot Scenario.zip](#) and import it to your Contact Center Administrator application.
2. Select the imported scenario and click **EDIT** to open it.

The following scenario blocks (with comments) are included in this example scenario. Be sure to read the comments that explain each scenario block's properties.

1. **Chat Bot Select Account:** This block tells the system which integrated bot will be used for this scenario.

Chat Bot Select Account

This block selects Chat Bot account to be used by Ask a Bot

Title text:

Account:

Bad Bot ▼

Bad Bot

Dental Bot

Helper Bot Product Returns

Lex Flower

Select an integration account

2. **Set Variable:** This establishes the customer's first name and last name. Setting this context helps to personalize the conversation.

Set Variable

Scenario has variables. The block sets a variable to a value. You may use `$(VarName)` in the value field to substitute other variable values.

Variable name:

Value:

```
$(item.externalChatData.first_name)
$(item.externalChatData.last_name)
```

Use a variable to get the customer's name from the pre-chat form and use it in the chat interaction

3. **Send Message+:** This block delivers a chat message to the customer, incorporating the customer's name.

Send Message+

Send SMS or a message to chat customer

Media type CHAT SMS

Message:

```
Hi
$(item.externalChatData.first_name),
I'm a virtual assistant. How can I
help you?
```

Wait for text input:

Result variable name:

Timeout after, sec:

Have the bot send a message to the customer, addressing him/her by name

4. **Set Variable:** This time, we are defining a step. In this example scenario, we want the bot to respond to the customer two times before connecting to the agent. The first time is specified as "step 0" and the second time is specified as "step 1." The scenario will run through both steps. If the customer's issue is not resolved by step 1, the customer is transferred to the agent for help.

Set Variable

Scenario has variables. The block sets a variable to a value. You may use `$(VarName)` in the value field to substitute other variable values.

Variable name:

Value:

Use a variable to define this part as the first in a series of steps

5. **If:** The If block specifies what happens if the customer did not write a message in the pre-chat form's Message field. If that field is empty, the scenario tells the bot to send a message. The message aligns with what you have configured your Watson Assistant to say. We call the bot's messages suggestions.
 1. Add a branch
 2. Give it a condition of item.message is empty

If

Allows branching scenario on conditions. Can have a number of conditions with associated branches.

Title text:

Branch1

Exit label:

"item.message" is empty
[add condition](#) [add block](#)

If the customer's message is empty, have the bot send a message to the customer

6. **Ask a Bot:** The scenario uses this block to get suggestions (i.e., some response from the Watson Assistant) to deliver to the customer. For each of the conditional exits (Failed, Timeout, or No Data), the scenario will send a message and then connect to the agent.

Ask a Bot

This block requests suggestions for text message from chat suggestions engine

Title text:

Message:
Message text (last received message by default)

Suggestions:
Variable receiving array of suggested responses

Response:
Variable receiving raw bot response

Timeout after, sec:

Get suggestions from the bot

7. **Send Message+:** This is used to send a message to the customer via either chat or SMS. In this example, the message is sent in the active chat interaction. If a specific message is not defined here, the standard system-wide message is sent to the customer.

Send Message+

Send SMS or a message to chat customer

Media type CHAT SMS

Message:

Wait for text input:

Result variable name:

Timeout after, sec:

Send another message if you want

8. **Set Variable:** This time, we are defining "step 1." Remember, we want the bot to respond to the customer two times before connecting to the agent. The first time is specified as "step 0" and the second time is specified as "step 1." The scenario will run through both steps. If the customer's issue is not resolved by step 1, the customer is transferred to the agent for help.

Set Variable

Scenario has variables. The block sets a variable to a value. You may use `$(VarName)` in the value field to substitute other variable values.

Variable name:

Value:

Define this part as step 1

9. **If:** In this If block, a condition is set to make sure that if the scenario takes more than two steps to resolve the customer's issue, then it will transfer the chat from the bot to the agent.
 1. Add a branch
 2. Give it a condition of "steps" > "2"

If

Allows branching scenario on conditions. Can have a number of conditions with associated branches.

Title text:

Branch1

Exit label:

"steps" > "2" (number)
[add condition](#) [add block](#)

If the scenario takes more than two steps to resolve the customer's issue, then the agent steps in

10. **Find Agent:** The Find Agent block looks for the next available skilled agent to accept the chat. You can use Find Agent to set wait times and send the customer messages about estimated waiting time (EWT).

Find Agent (Chat)

The block finds the best matching agent for the interaction according to requested skills. Agent's login handle is saved in "Destination" variable. Use Connect Chat block to connect to the agent.

Title text:

Agent skills required

Wait condition

Wait time **Wait condition**

0 - 600 sec

[add Interval](#)

Overflow call handling starts at: Never

Initial Message:

Periodic Message:

Repeat every: seconds

The bot couldn't resolve the customer in two steps, so the scenario looks for an agent

11. **Connect Chat:** Connect Chat is for setting the destination of the chat. If you leave the destination fields empty, the Find Agent block will find the first available agent.

Connect Chat

Connects chat to an agent found by preceding Find Agent block, or to pre-selected chat Scenario Entry.

Title text:

Destination

Default Destination:
Chat Scenario entry to connect to if no agents were returned by Find Agent block

Override Destination:
Chat Scenario entry to connect chat in all cases, ignoring agent possibly found by Find Agent block

Mark all interactions connected by this block as overflow

Options

No Answer Timeout: seconds

Auto-answer in: seconds (leave empty to turn auto-answer off)

You can either specify a destination for the chat or let the system find the next available agent

12. **Exit:** The Exit block completes the scenario. Without it, the scenario will loop through this configured flow until the customer ends the chat.

Step 6: Create or Select a Chat Service

See [Web Chat Configuration Step 2](#).

Step 7: Create or Choose a Chat Scenario Entry

Note that this step is basically the same as [Web Chat Configuration Step 3](#), with the addition of another important property.

1. Go to *Configuration > Scenario Entries > [Messaging/Chat](#)* and select a scenario entry point to use with your chat scenario. The entry point is what starts the scenario.

The screenshot shows the 'Messaging/Chat >> Chat with a bot >> Properties' interface. On the left is a navigation tree with 'Messaging/Chat' selected. The main area is split into a table of entries and a 'Properties' tab.

Name	Scenario	Unique identifier
Chat with a bot	Mobile Chat	eef2fb2f37ce4e0...
LambdaChat	LambdaChat	9700f6fc332b45...
LINE Chat	LINE Basic Chat	06f08cc3d82940...
Messenger Chat	Mobile Chat	aa255cbe62a04a...
Support	Mobile Chat	b797c44d-e35b-...

The 'Properties' tab for 'Chat with a bot' includes the following fields:

- Scenario Entry name: Chat with a bot
- Unique identifier: eef2fb2f37ce4e0aa6a498c719d1e04
- Scenario: Mobile Chat (with [add/edit](#) link)
- Service: Customer Service Chat (with [add/edit](#) link)
- Default service for voice callback: Customer Service (with [add/edit](#) link)
- Merge sessions for identified contacts:
- Hours of Operation: from service select specify
- Web HTML snippet: HTML snippet (button)
- Full chat code for local hosting: Download (button)

Messaging/Chat scenario entries list

2. If there are no existing chat scenario entries shown, you have to create one.

How to Add a New Chat Scenario Entry

1. Click the **Add chat scenario entry** button.
2. In the Properties tab, fill in the properties as appropriate (see below for required and optional properties). For definitions, see the *Contact Center Administrator Guide*, section [Messaging/Chat](#).

Required Properties

In the Properties tab, make sure to address the following fields right now. These are critical to chat configuration.

The screenshot shows the 'Properties' tab with the following fields filled out:

- Name: Redwood Chat
- Unique identifier: f6e8dea10754493c9b3564208b308bc
- Scenario: Super Chat (with [add/edit](#) link)
- Service: Pacific Chat (with [add/edit](#) link)

Messaging/Chat scenario entry properties that you need to address for chat to work

- **Name** - The unique name (any) of the chat scenario entry (e.g., "Redwood Chat")
- **Unique identifier** - A long string of characters that identifies the chat entry. It is recommended that you change it to something short and unique (e.g., "1234").

- **Scenario** - Choose the Chat Scenario you selected or created earlier in this procedure (e.g., "Super Chat"). This is where the parts come together to make chat possible.
- **Service** - Choose the Chat Service you selected or created earlier in this procedure (e.g., "Pacific Chat"). This is where the parts come together to make chat possible.
- **Bot / Chat suggestions engine** - The engine that will provide suggested replies to the agent during chat. Note that in order to use a bot/chat suggestions engine, you must have an integration account configured for your contact center.

Other Properties

The [other remaining properties](#) are optional at this time. You can come back to them later.

Step 8: Edit Chat Widget Style

See [Web Chat Configuration Step 4](#)

Step 9: Add a Contact Tab

In order for this chat scenario entry to work, you must add a contact tab for the chat widget. See [How to Add a Contact Tab](#).

Step 10: Get the HTML

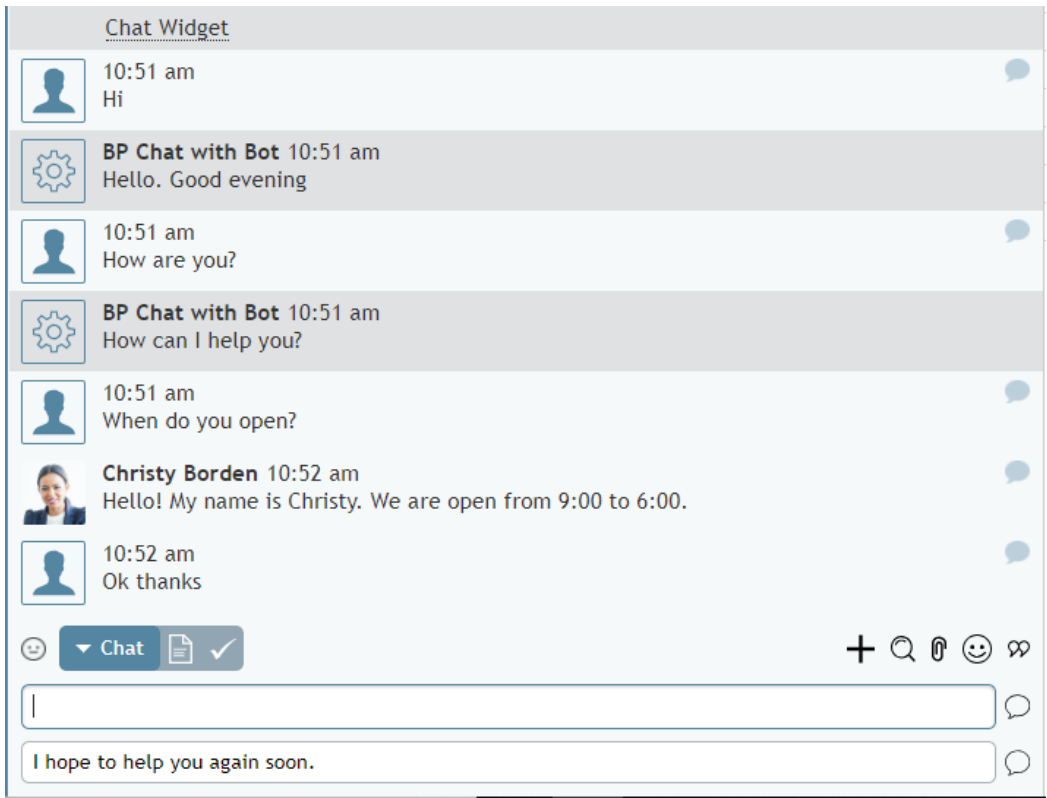
See [Web Chat Configuration Step 6](#)

Final Step: Test the Chat

You have now successfully set up your contact center service, scenario, and chat widget to work in an integrated manner with your Watson Assistant. You should test it to make sure that the:

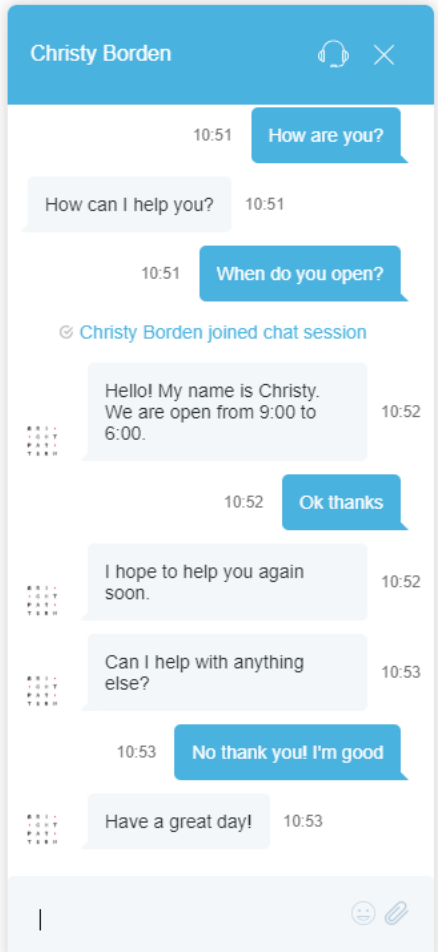
- Customer's name entered on the pre-chat form comes through during the chat
- Bot is able to automate the conversation with the customer
- Customer is connected to an agent if the bot couldn't help within two tries
- Agent is able to see the bot's suggestions during the active chat

The following screenshot shows a service chat (on the Agent Desktop side) where the bot provides two responses to the customer and then connects to an agent. You can see the bot's suggestion below the agent's text input field.



Example chat as seen on Agent Desktop

And the following is how the chat looks to the customer:



Example chat as seen by customer on webpage