Conversation scripts

module setup instructions

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Preparing for the setup

Make sure that you append Conversation scripts section to Workplace of user who is responsible for manage Conversation scripts



Setting up conversation scripts

In order to add the conversation script, the following sequence of actions is required:

1. Go to the Conversation scripts section.
2. Click the “New” button.



1. Fill in necessary information on the conversation script:



|  |  |  |
| --- | --- | --- |
| Field name  | Description  | Example  |
| Name  | It is necessary to specify the name of the CS | Financing Lead Script |
| Entity | It is necessary to specify the Entity, based on the records of which shall be formed CS  | Lead |
| Code  | It is necessary to specify the Code of the CS.  | 01 |

1. Fill in necessary information on Questions of the conversation script:



|  |  |  |
| --- | --- | --- |
| Field name  | Description  | Example  |
| Question | It is necessary to specify the text of the Question | Hello! My name is [#Owner.GivenName#]. Can you spare 1-2 minutes of your time? |
| Priority | If it is necessary specify the Priority, of the Question | 1 |
| Final | If it is necessary specify the Final flag, for the Question  | False |
| Attribute in question | Optionally You can add the Attribute in question and use macros in text of Question to build personalized question text | [#Owner.GivenName#] |

1. Fill in necessary information on Answers of the Question:



|  |  |  |
| --- | --- | --- |
| Field name  | Description  | Example  |
| Answer | It is necessary to specify the text of the Answer | Yes, call back |
| Priority | If it is necessary specify the Priority, of the Answer | 1 |
| Result | If it is necessary specify the Result, for the Answer | Agree |
| Next question | If it is necessary specify the Next question from questions list, for the Answer | We have prepared a special offer |
| Button style | If it is necessary specify the Button style, for the Answer | Green |
| Process | If it is necessary specify the Process, for the Answer |  |
| Controls | Optionally You can add the Controls in Answer to use it to specify some data in this Answer | Caption: WhenValue type: Date/TimeRequired: TruePriority:1 |

Setting up Activity to conversation scripts

In order to add the Activity to conversation script, the following sequence of actions is required:

1. Go to the Activity section
2. Set up “The process of processing activity according to the conversation script” for selected record in Run business process from section and Process parameter where the record is passed is set to “ID of the selected record”
3. Click the “New” button
4. Choose category Call
5. Fill in Conversation script in Activity



1. Run process of processing activity according to the conversation script on created Activity

Setting up Queue to conversation scripts

In order to add conversation script to the Queue, the following sequence of actions is required:

1. Go to the Queue section
2. Click the “New” button
3. Choose Queue type same as Entity in Conversation script
4. Fill in Conversation queue parameters as usual



1. Use “The process of processing activity according to the conversation script” and fill free to customize process in Creatio Low-code process designer if you need.
2. Process Queue elements using your configured scripts!

