



Cloud Shayona Guide

Table of Contents

1. Shayona Training Notes	2
2. Prerequisites	2
3. How to Add Shayona Chatbot to Salesforce Application.....	3
3.1. Open/Edit Salesforce Application	3
3.2. Create Utility Item.....	3
3.3. Utility Item Configuration	5

1. Shayona Training Notes

Please check shayona training notes excel sheet to get idea on how to ask question to shayona chatbot. it will help you understand the methodology of statements which are going to ask to shayona.



Shayona Training
Notes.xlsx

Shayona Training Notes

2. Prerequisites

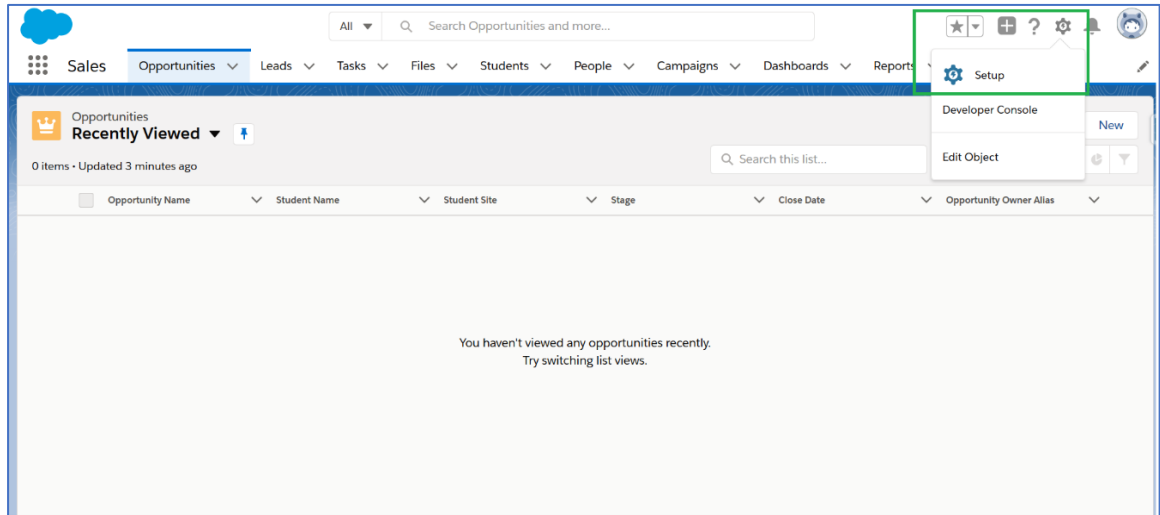
Enable My Domain for the Environment Hub

1. Find an available domain name and sign up for it.
 - a. From Setup, enter My Domain in the Quick Find box, then select My Domain.
 - b. Enter the subdomain name you want to use within the sample URL.
 - c. Select Check Availability. If your name is already taken, choose a different one.
 - d. Select Register Domain.
 - e. You receive a confirmation email from Salesforce when your new domain is ready for testing.
2. Test your domain name and deploy it to your org.
 - a. Click the URL in the confirmation email to log in to Salesforce using your new domain. Alternatively, from Setup, enter **My Domain** in the Quick Find box, select My Domain, and then select **Click here to login**.
 - b. Test the new domain by clicking tabs and links within your org. Notice that all pages show your new domain name.
 - c. To roll out the new domain name to your org, from Setup, enter My Domain in the Quick Find box, select My Domain, and then select Deploy to Users. The domain is activated immediately, and your users are redirected to pages with the new domain.

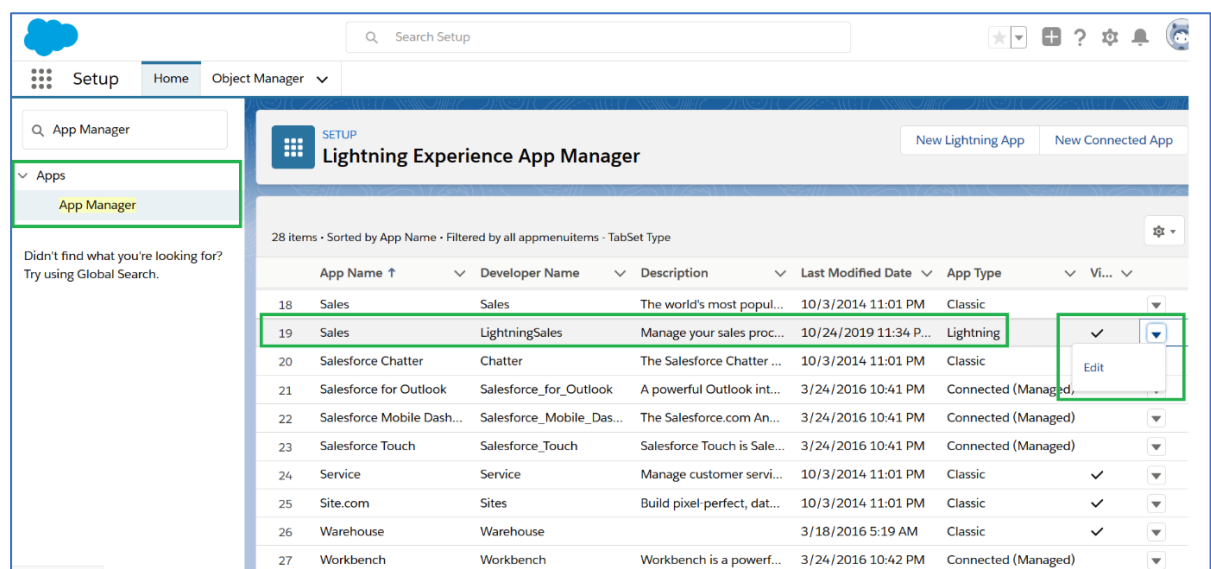
3. How to Add Shayona Chatbot to Salesforce Application

3.1. Open/Edit Salesforce Application

- Go to Lightning Experience Mode
- Go to Setup

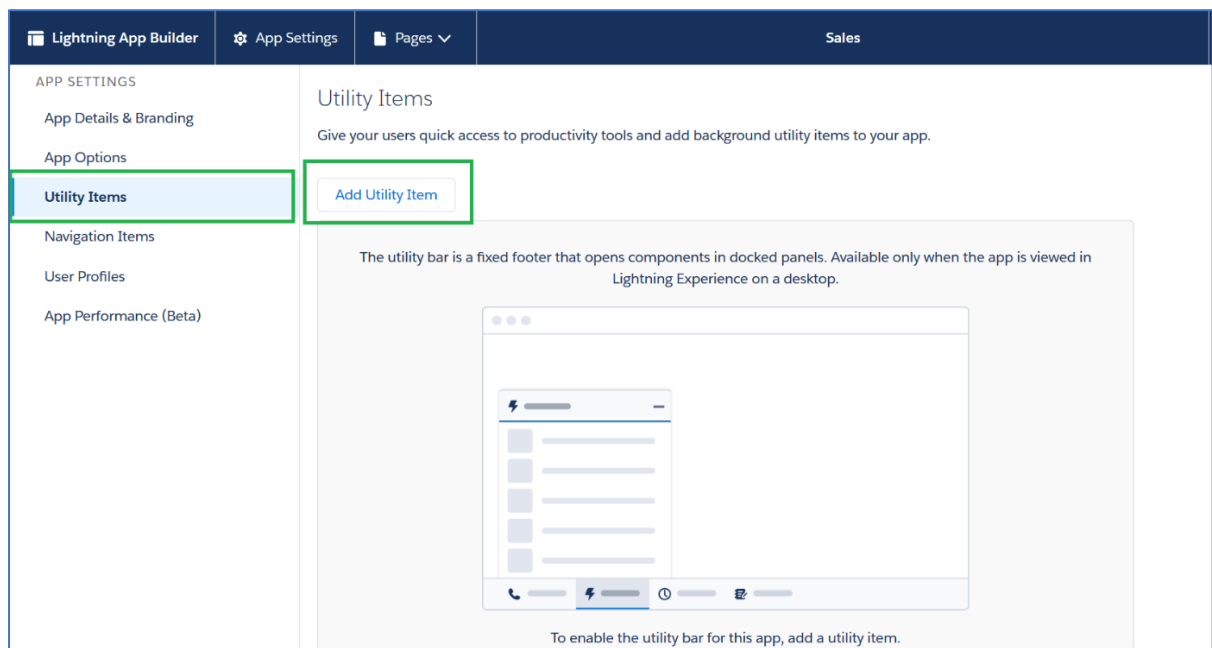


- Go to App Manager
- Select Salesforce Application wherever you want to include Shayona Chatbot.

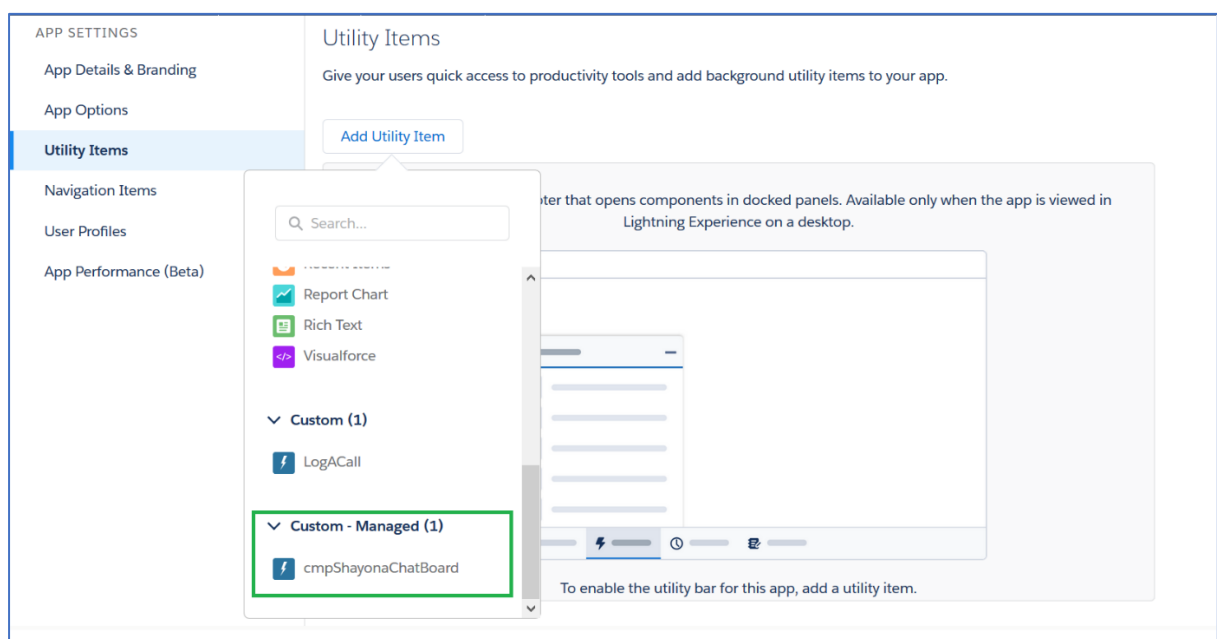


3.2. Create Utility Item

- Go to Utility Item
- Click on “Add Utility Item” button



After clicking on Add Utility Item, It will search and ask to select component for Utility Item. Where you need to select “cmpShayonaChatBoard” in list of components (basically it will be at very bottom of search list).



- Click on “cmpShayonaChatBoard” custom manged component.

3.3. Utility Item Configuration

- Update all settings as per below snap and Save it.

The screenshot displays the 'APP SETTINGS' interface for 'Shayona'. The left sidebar lists settings categories: App Details & Branding, App Options, Utility Items (highlighted), Navigation Items, User Profiles, and App Performance (Beta). The main area shows a configuration panel for 'cmpShayonaChatBoard'. The 'Utility Item Properties' section is expanded, showing fields for Label (Shayona), Icon (chat), Panel Width (500), Panel Height (480), and a checked 'Start automatically' option. A 'Save' button is highlighted at the bottom right.

APP SETTINGS

- App Details & Branding
- App Options
- Utility Items**
- Navigation Items
- User Profiles
- App Performance (Beta)

Shayona

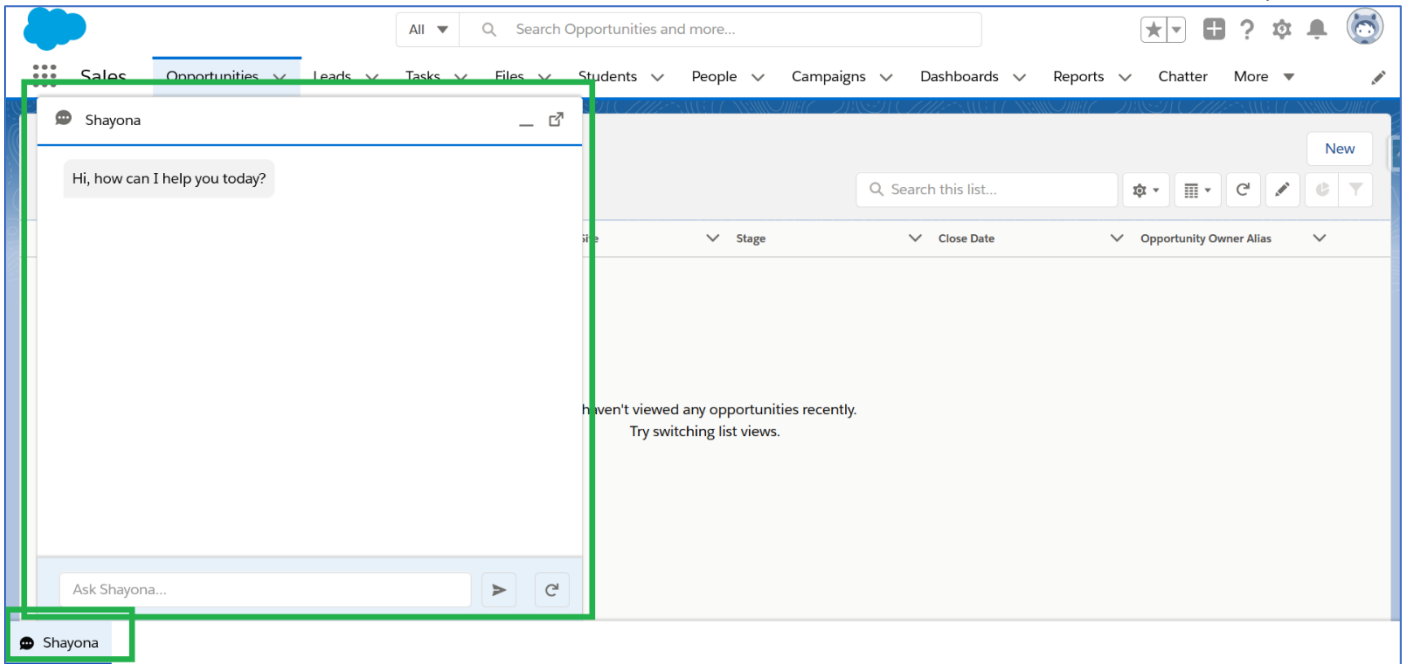
PROPERTIES
cmpShayonaChatBoard

Utility Item Properties

- Label: Shayona
- Icon: chat
- Panel Width: 500
- Panel Height: 480
- ☒ Start automatically

Cancel Save

- After click on Save button, you can go back to setup and open Salesforce Application where you included shayona chatboard.
- It will look like below in your salesforce application.



THANK YOU!!!

Please contact us in case of any query or question.

Email: contact@cloudarsh.com