

AiChat Lead Capture App for Salesforce Guide

This app enables businesses to easily set up multiple leads generation campaigns via Facebook, capture leads information via Messenger bot in an intuitive conversational way, and sync up with Sales Cloud automatically.

This app can be used by marketing/CRM managers who want to generate and capture more qualified leads via Facebook Ads and Facebook Messenger more effectively.

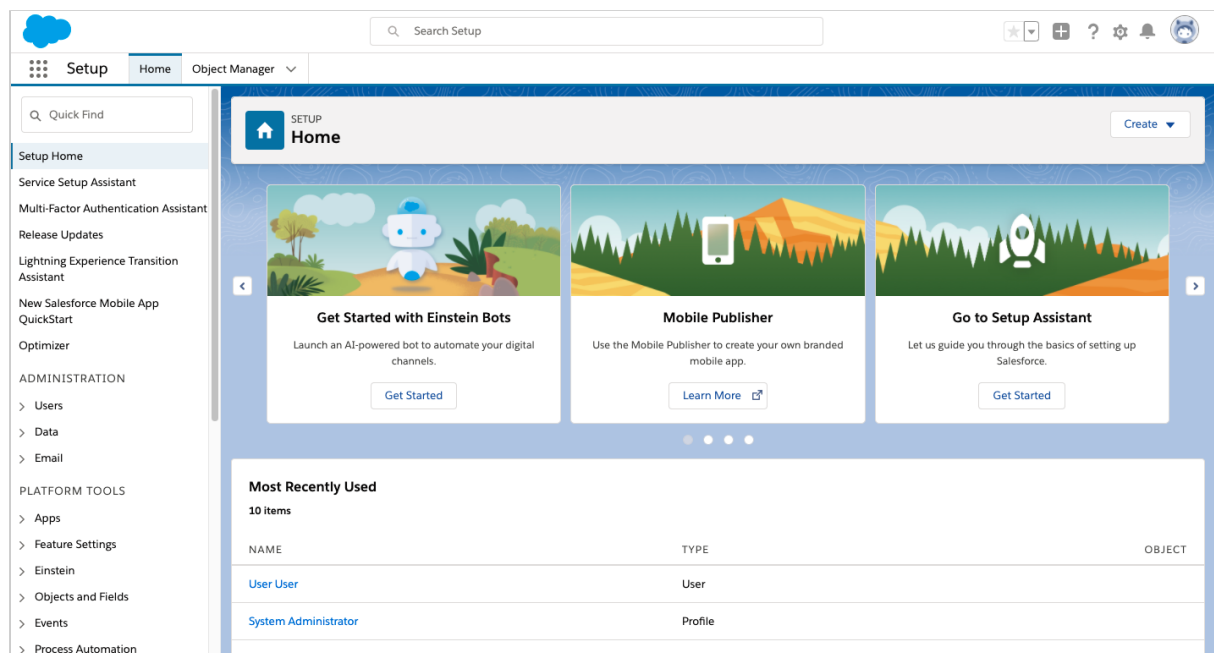
Before using the AiChat Lead Capture App, be sure you have these ready:

- Facebook page of your business
- Salesforce Sales Cloud account
- AiChat Lead Capture App installed in your Sales Cloud

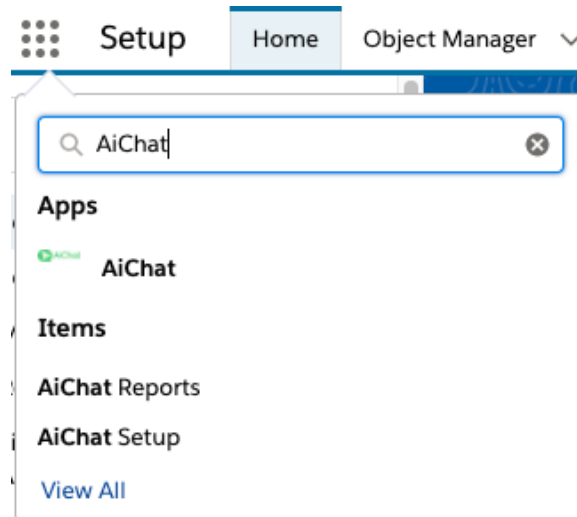
Opening the AiChat Lead Capture App

To open the AiChat Lead Capture App, please follow these instructions:

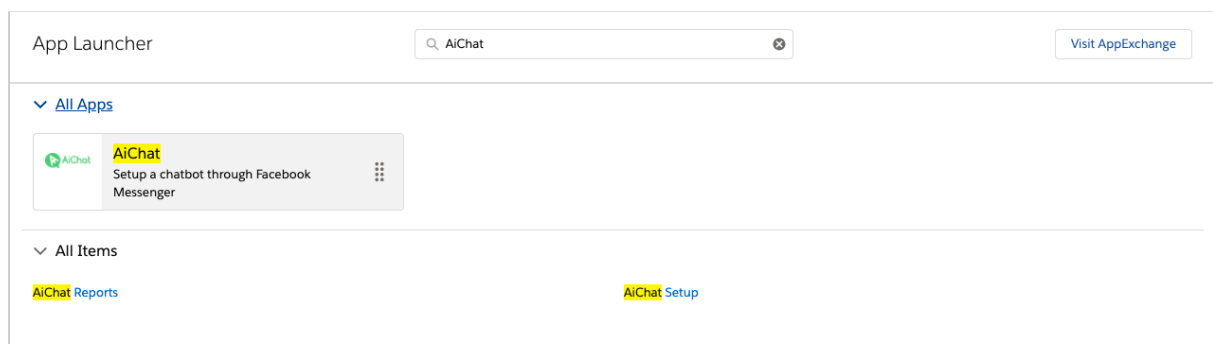
1. Go to <http://appexchange.salesforce.com> and log in to your account. You will see the main screen of Salesforce AppExchange.



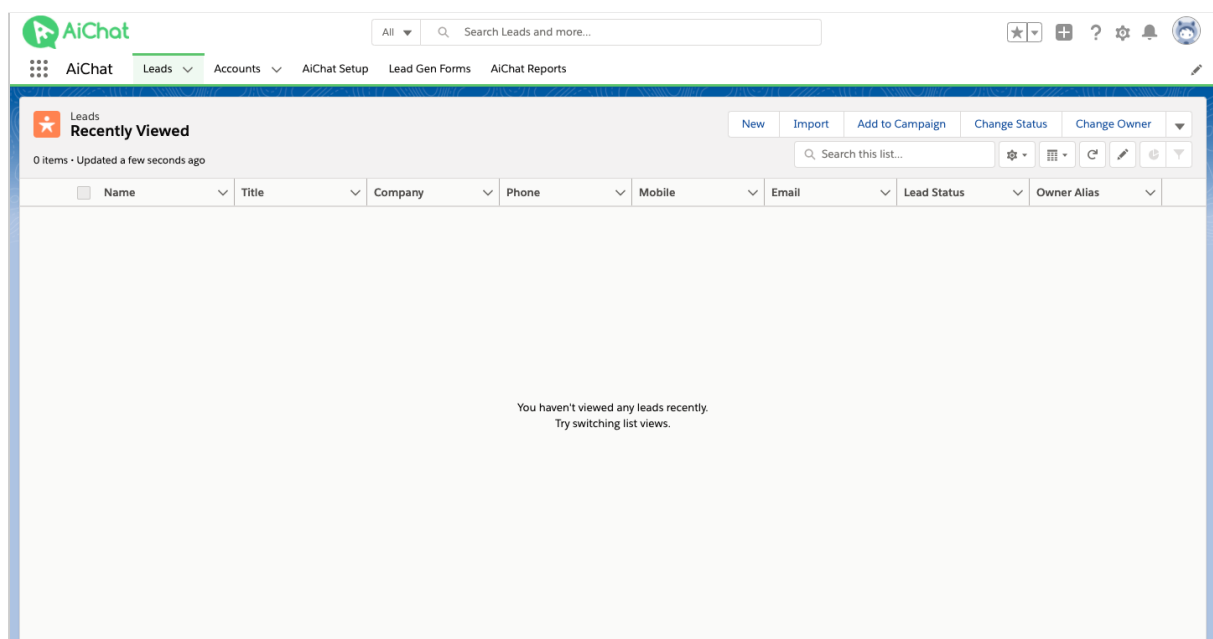
2. Click the App Launcher on the top left, as shown by the  icon, then type “AiChat” in the search box. You will find the AiChat Lead Capture app.



The other way to search the AiChat Lead Capture App is by clicking **View All** in the App Launcher dropdown. The App Launcher will pop up, and you can easily search the app.



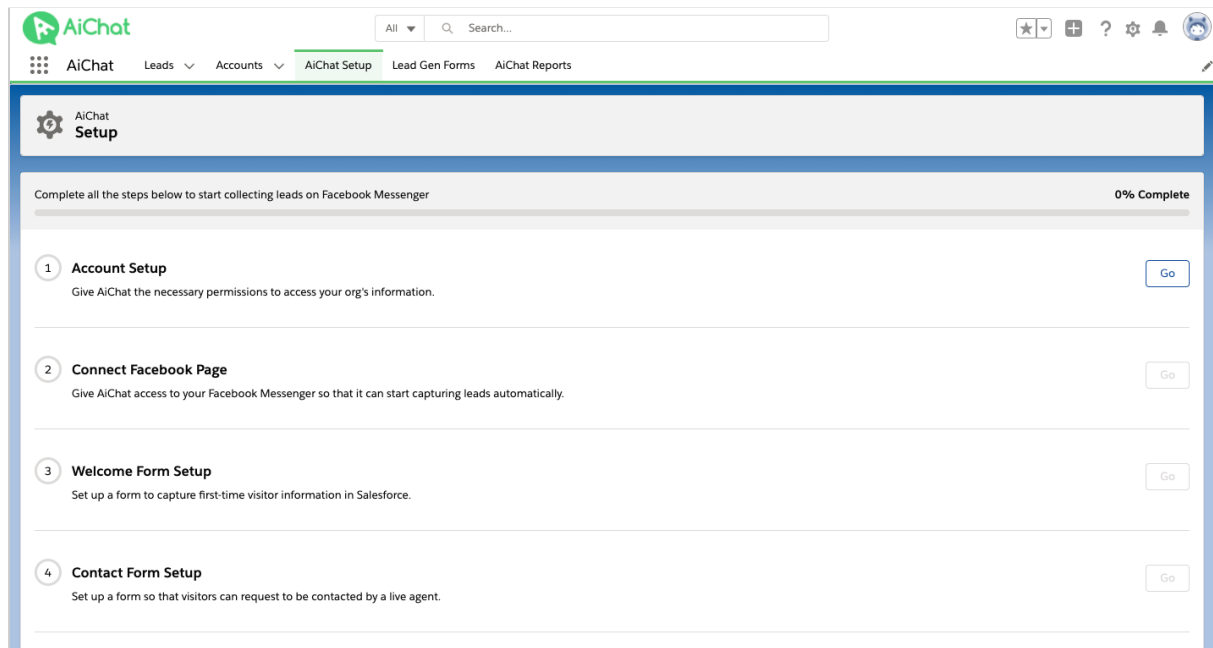
3. Once you click the AiChat app, you are welcomed to the AiChat Lead Capture App screen. This is where you will create lead generation forms for your Facebook business page.



Initial setup of AiChat Lead Capture App

Now that you have opened the AiChat Lead Capture App for the first time, you will need to configure it before your brand could start collecting leads through Facebook Messenger.

Click the **AiChat Setup** tab. There are 5 steps to complete the setup.

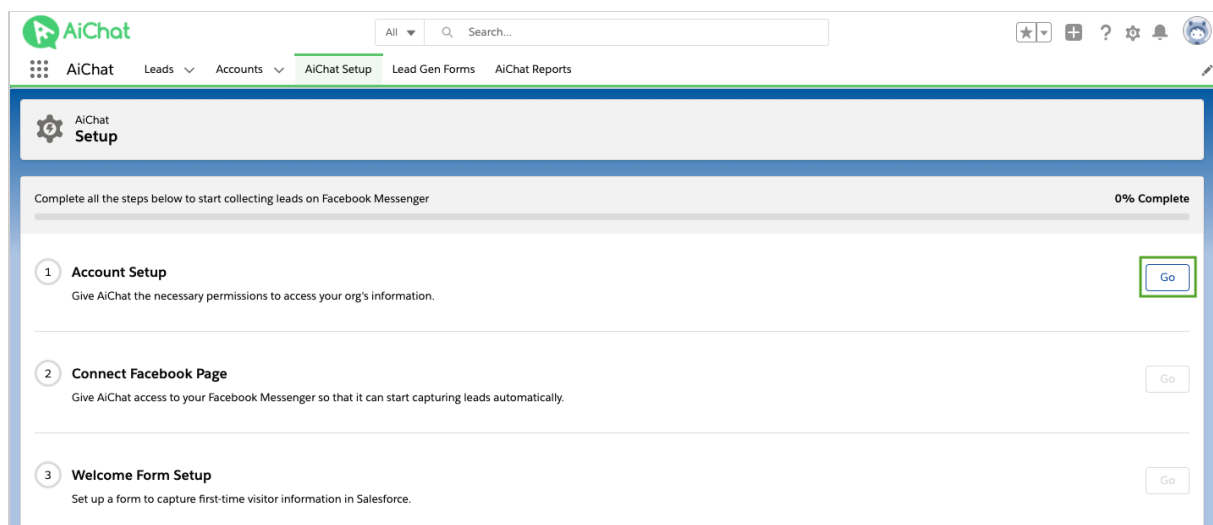


1. Account Setup

By setting up your account, you give AiChat the necessary permission to access your org's information.

Please follow these instructions:

1. In the AiChat Setup page, you will see **Account Setup**.



Click the **Go** button on the right side and the **Account Setup** dialog box will pop up.

Note

If you have already received your credentials (consist of AiChat Account ID, AiChat API Client ID, and AiChat API Client Secret), follow steps 2-6. If you have not received the credentials, please jump to steps 7-12.

Account Setup

Give AiChat the necessary permissions to access your org's information.

* AiChat Account ID ⓘ

olympus.sf_jejo

* AiChat API Client ID ⓘ

4

* AiChat API Client Secret ⓘ

NvgQz39gbhzWEEEnvETRpMbd8mUFYIWehRoWgOsn5

Don't have an account? [Sign up](#) now.

Cancel

Submit

2. Please input your Account ID in the **AiChat Account ID** field.
3. Please input your API Client ID in the **AiChat API Client ID** field.
4. Please input your API client secret in the **AiChat API Client Secret** field.
5. Click the **Submit** button, and you will land on the authentication page.
6. Finally, click the **Allow** button. Now you have your account set up.



Allow Access?

AiChat Lead Capture Connected App is asking to:

- Access your basic information
- Access and manage your data
- Perform requests on your behalf at any time

Do you want to allow access for test-n0ndda8fofat@example.com? (Not you?)

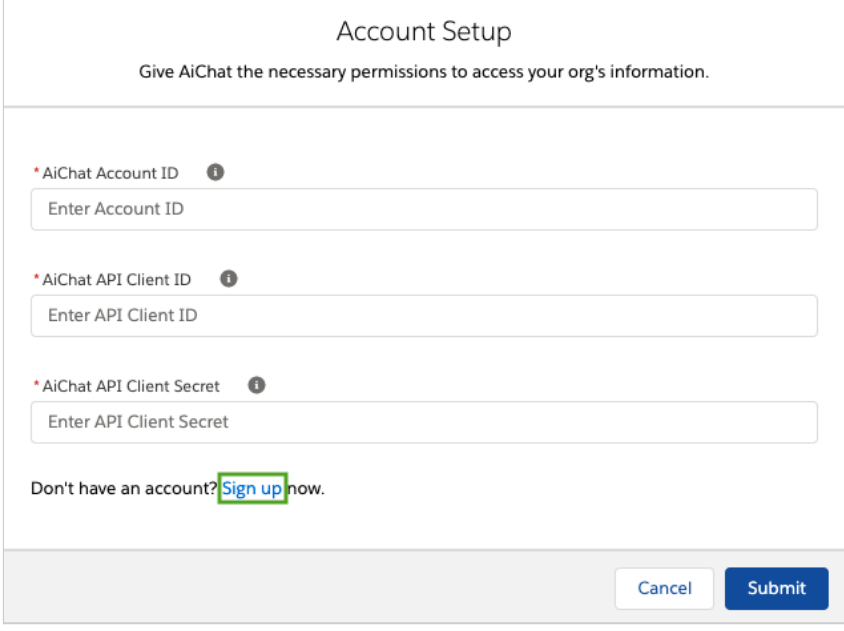
Deny

Allow

To revoke access at any time, go to your personal settings.

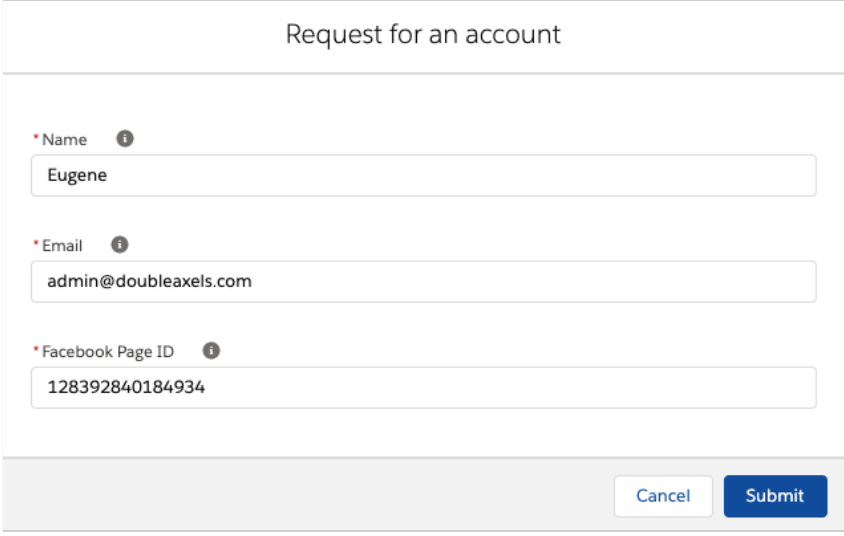
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7. If you do not have the app account yet, send a request to AiChat by clicking the **Sign up** link.



The 'Account Setup' dialog box has a title bar with the text 'Account Setup' and a subtitle 'Give AiChat the necessary permissions to access your org's information.' Below the subtitle are three input fields, each with a red asterisk and an information icon. The first field is labeled 'AiChat Account ID' and contains the placeholder text 'Enter Account ID'. The second field is labeled 'AiChat API Client ID' and contains the placeholder text 'Enter API Client ID'. The third field is labeled 'AiChat API Client Secret' and contains the placeholder text 'Enter API Client Secret'. Below these fields is a link that says 'Don't have an account? Sign up now.', where 'Sign up' is highlighted with a green box. At the bottom right are two buttons: 'Cancel' and 'Submit'.

The **Request for an account** dialog box will pop up.



The 'Request for an account' dialog box has a title bar with the text 'Request for an account'. Below the title bar are three input fields, each with a red asterisk and an information icon. The first field is labeled 'Name' and contains the text 'Eugene'. The second field is labeled 'Email' and contains the text 'admin@doubleaxels.com'. The third field is labeled 'Facebook Page ID' and contains the text '128392840184934'. At the bottom right are two buttons: 'Cancel' and 'Submit'.

8. Enter your name in the **Name** field.

9. Please input your email address in the **Email** field.

10. Please input the ID of your Facebook Business page in the **Facebook Page ID** field.

11. Click the **Submit** button to send the request to AiChat. You should receive an acknowledgement email.

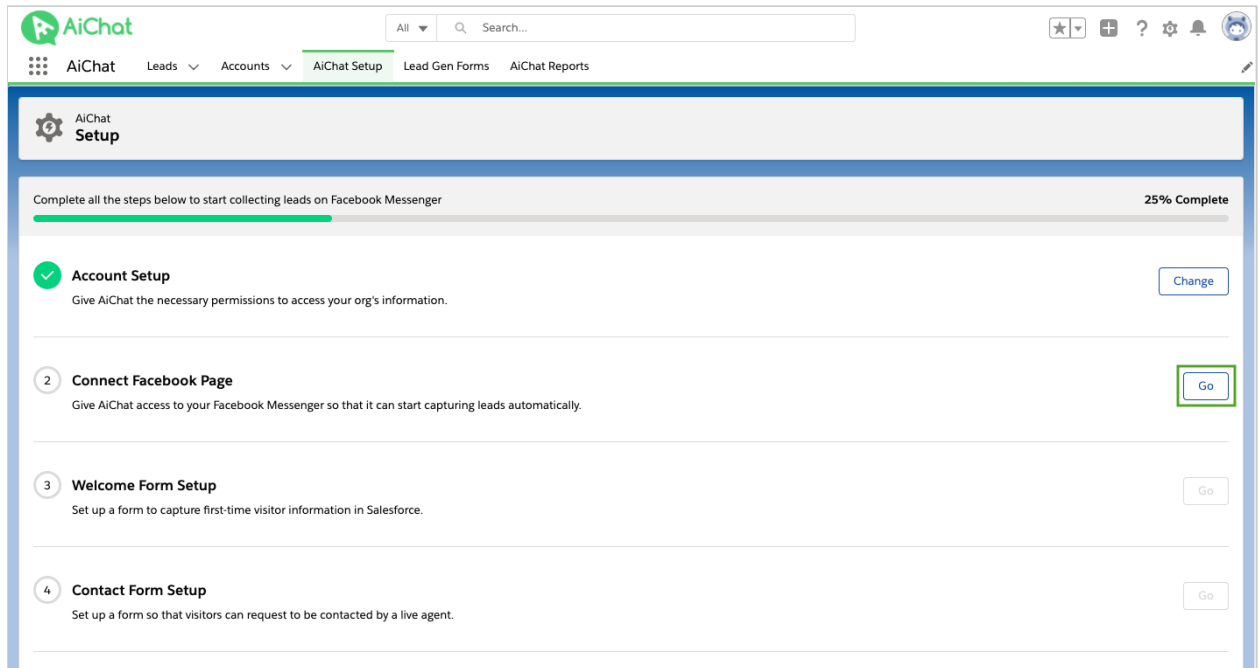
12. The credentials will be sent to you via email within 2-3 business days. Continue to steps 2-6 once you have received the credentials.

2. Connect Facebook page

By connecting your Facebook business page, you give AiChat access to your Facebook Messenger so that it can start capturing leads automatically.

To connect, please follow these instructions:

1. In the Setup Page, you will also see that **Connect Facebook page** is now active.

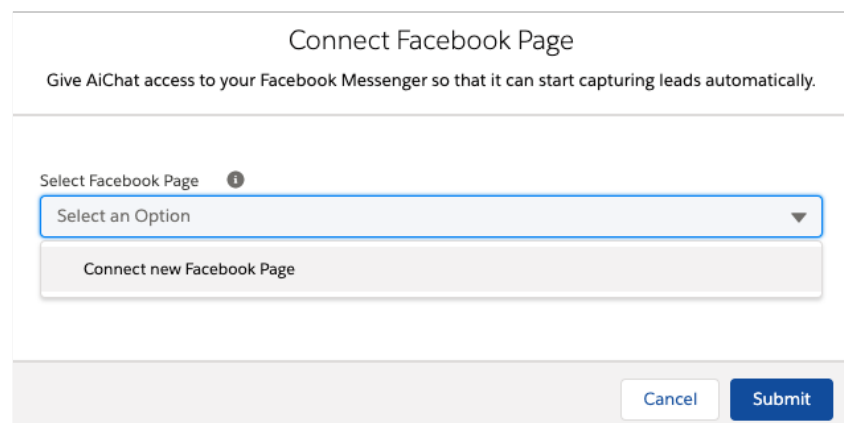


The screenshot shows the AiChat Setup interface. At the top, there's a navigation bar with 'AiChat' and various menu items. Below it, a 'Setup' section is titled 'Complete all the steps below to start collecting leads on Facebook Messenger' with a progress bar indicating '25% Complete'. The setup steps are listed as follows:

- Account Setup** (Step 1): Give AiChat the necessary permissions to access your org's information. A 'Change' button is on the right.
- Connect Facebook Page** (Step 2): Give AiChat access to your Facebook Messenger so that it can start capturing leads automatically. A 'Go' button is on the right, highlighted with a green box.
- Welcome Form Setup** (Step 3): Set up a form to capture first-time visitor information in Salesforce. A 'Go' button is on the right.
- Contact Form Setup** (Step 4): Set up a form so that visitors can request to be contacted by a live agent. A 'Go' button is on the right.

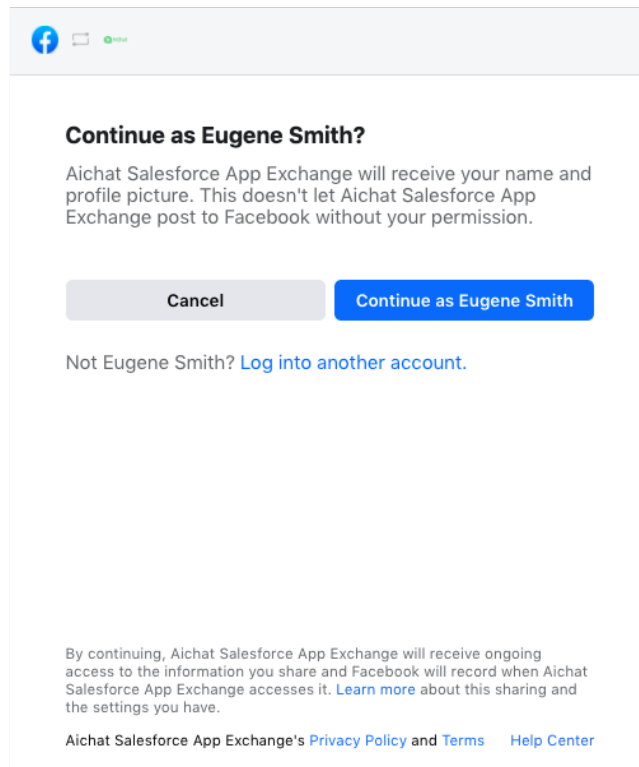
Click the **Go** button on the right side and the **Connect Facebook Page** dialog box will pop up.

2. Click the dropdown menu to expand it, then select **Connect new Facebook Page**.

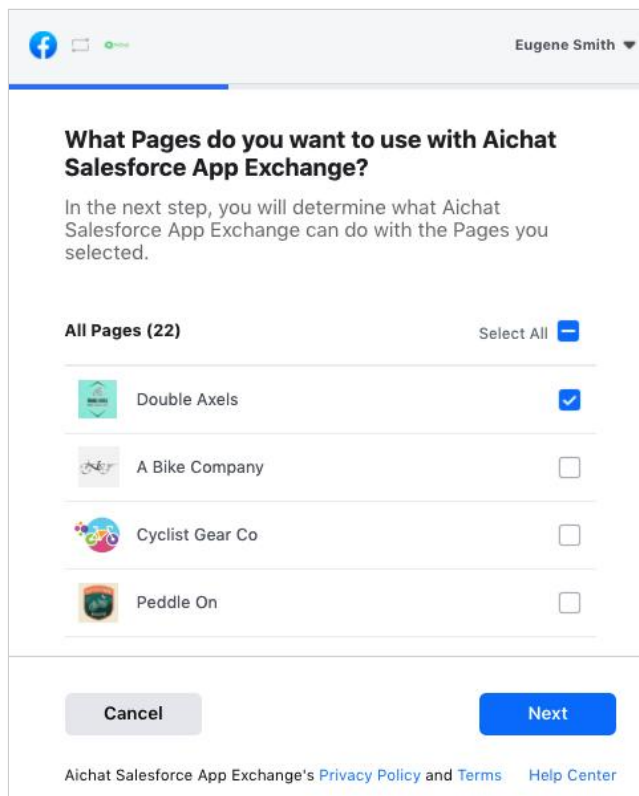


The 'Connect Facebook Page' dialog box is shown. It has a title 'Connect Facebook Page' and a subtitle 'Give AiChat access to your Facebook Messenger so that it can start capturing leads automatically.' Below this, there's a section 'Select Facebook Page' with an information icon. A dropdown menu is open, showing 'Select an Option'. Below the dropdown is a button labeled 'Connect new Facebook Page'. At the bottom of the dialog, there are 'Cancel' and 'Submit' buttons.

3. You will be redirected to Facebook. Log in to your Facebook account.

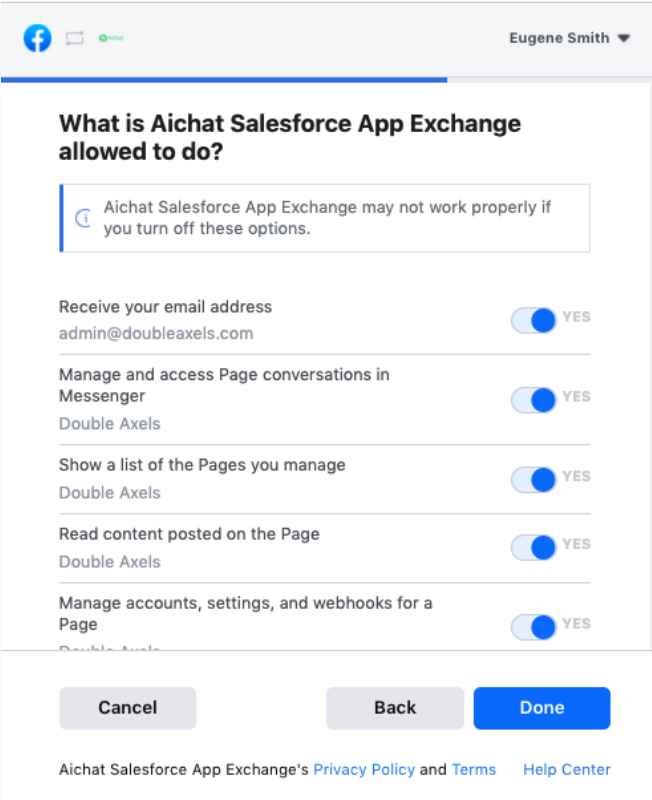


4. Another dialog box will pop up. This allows you to select the business page you want to integrate with the AiChat Salesforce App Exchange. In this example, your business is a bicycle shop called “Double Axels” and you have had the Facebook business page ready.



Tick the checkbox on the right side of your business page, then click **Next**.

5. Another dialog box will pop up. This allows you to activate the functions of AiChat Salesforce App Exchange on your business page.



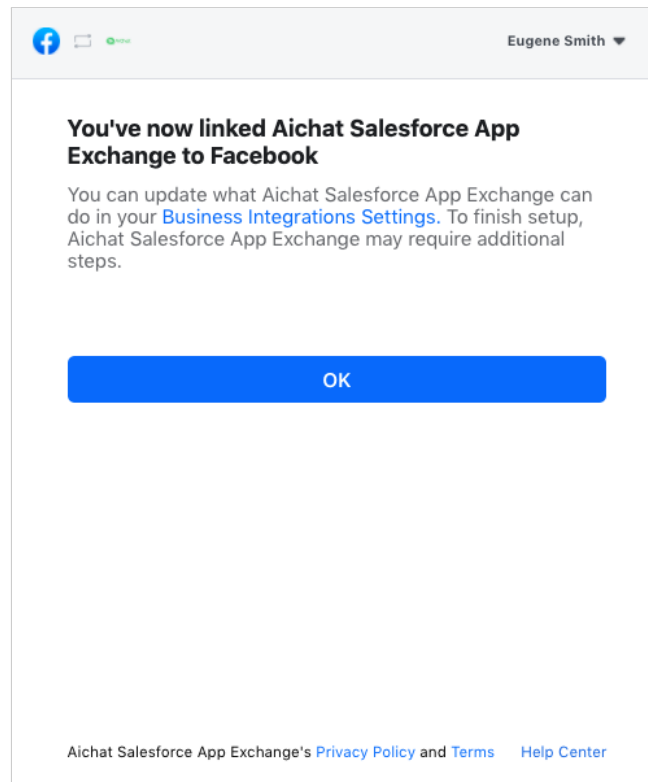
The screenshot shows a Facebook permissions dialog box for the 'Aichat Salesforce App Exchange'. At the top, there are icons for Facebook, Messenger, and WhatsApp, and the user's name 'Eugene Smith' with a dropdown arrow. The main heading is 'What is Aichat Salesforce App Exchange allowed to do?'. Below this is a warning box with a clock icon stating: 'Aichat Salesforce App Exchange may not work properly if you turn off these options.' The dialog lists five permissions, each with a toggle switch set to 'YES' and the app name 'Double Axels' listed below the permission text:

- Receive your email address: admin@doubleaxels.com
- Manage and access Page conversations in Messenger: Double Axels
- Show a list of the Pages you manage: Double Axels
- Read content posted on the Page: Double Axels
- Manage accounts, settings, and webhooks for a Page: Double Axels

At the bottom, there are three buttons: 'Cancel', 'Back', and 'Done'. Below the buttons, there is a link to 'Aichat Salesforce App Exchange's Privacy Policy and Terms' and a 'Help Center' link.

Ensure that you enable all the functions. Otherwise, the app might not work properly. Click **Done** afterward.

6. You will be informed that the AiChat Salesforce App Exchange is linked to your Facebook business page.



7. Tweak the integration settings of the AiChat app and Facebook business page by clicking the **Business Integrations Settings** hyperlink in the notification box (see image in step 6).

8. A new tab in your browser containing the **Business Integration Settings** page will open automatically. Scroll down until you see **AiChat Salesforce App Exchange**, then click **View and Edit** on the right side.

Business Integrations

Connected to Your Account

Business integrations are apps and services that you've used Facebook to log into. They can receive information you chose to share with them and manage features for your Facebook business assets. Some permissions expire after 90 days, but you can choose to renew them. [Learn More](#)

Active 6

Removed

Search business integrations

Manage what information you're sharing and what business integrations are allowed to do or remove any business integrations that you no longer want to use. Remove

	Aichat Salesforce App Exchange Added on Feb 9, 2021	View and edit	☐
	Graph API Service Added on Jan 6, 2021	View and edit	☐

9. In the **AiChat Salesforce App Exchange** dialog box, ensure that all the boxes on the right of your Facebook business page name is checked. Also ensure the other items (Email address, etc.) are toggled on.

AiChat Salesforce App Exchange Active • Added: Feb 9, 2021

INFO YOU ARE SHARING WITH THIS BUSINESS INTEGRATION:

Name and profile picture REQUIRED

Email address ☒
admin@doubleaxels.com

WHAT BUSINESS FEATURES CAN BE MANAGED:

Descriptions of what AiChat Salesforce App Exchange can do have been updated.

Manage and access Page conversations in Messenger ☒

Pages ☒

Double Axels ☒

A Bike Company ☐

Cyclist Gear Co ☐

[Terms](#) · [Privacy Policy](#) · [Give Feedback](#) Cancel Save

Once complete, you can click the **Save** button to close the dialog box. You will return to the Business Integration page.

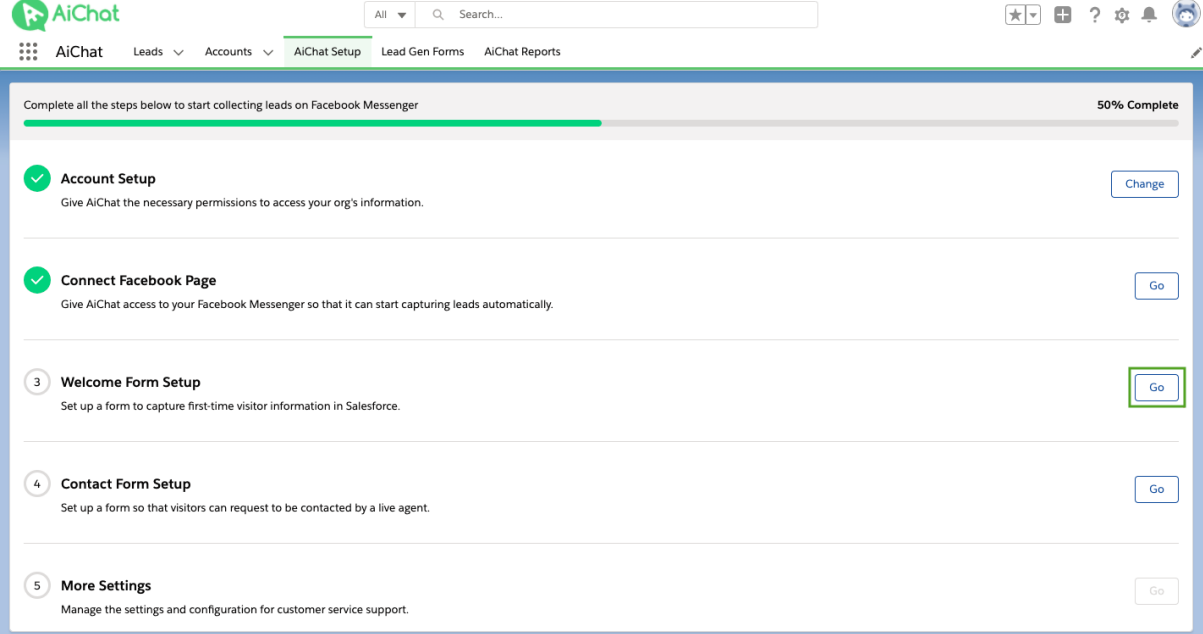
10. Return to the dialog box in Step 6 by clicking the tab that contains this dialog box. Click **OK** afterwards.

3. Welcome Form Setup

Set up a form so that first time visitors' information gets captured in Salesforce. In this example, you welcome customers by asking them which type of information from your bicycle shop they want sent to them regularly.

To complete the setup, please follow these instructions:

In the Setup Page, you will see that **Welcome Form Setup** is now active.



The screenshot shows the AiChat Setup interface. At the top, there's a navigation bar with the AiChat logo and a search bar. Below the navigation bar, there's a progress bar indicating "50% Complete". The main content area lists five setup steps:

- Account Setup** (Completed): Give AiChat the necessary permissions to access your org's information. A "Change" button is visible.
- Connect Facebook Page** (Completed): Give AiChat access to your Facebook Messenger so that it can start capturing leads automatically. A "Go" button is visible.
- Welcome Form Setup** (Active): Set up a form to capture first-time visitor information in Salesforce. A "Go" button is visible and highlighted with a green border.
- Contact Form Setup** (Pending): Set up a form so that visitors can request to be contacted by a live agent. A "Go" button is visible.
- More Settings** (Pending): Manage the settings and configuration for customer service support. A "Go" button is visible.

Click the **Go** button on the right side and the **Welcome Form Setup** dialog box will pop up.

Welcome Form Setup

Set up a form to capture first-time visitor information in Salesforce.

General Information

* Title ⓘ

Welcome form

* Synchronise this form with ⓘ

Select an Option▼

* Welcome message

Enter welcome message

Cancel

Submit

3.1 General Information

Fill in the general details of the form in the **General Information** box.

General Information

* Title ⓘ

Welcome Form

* Synchronise this form with ⓘ

Lead▼

* Welcome message

Hello! Thank you for reaching out. My name is Wheelie, Double Axel's virtual assistant. You may exit this conversation any time by typing '/exit' (no hard feelings!).

1. In the **Welcome message** field box, type your crafted welcome message. This will be the response the customer receives after he/she sends the first message to your brand in Facebook Messenger.

3.2 Action After Submission

Configure what happens after the form has been submitted in the **Action After Submission** box.



The screenshot shows a configuration box titled "Action After Submission". It contains two fields:

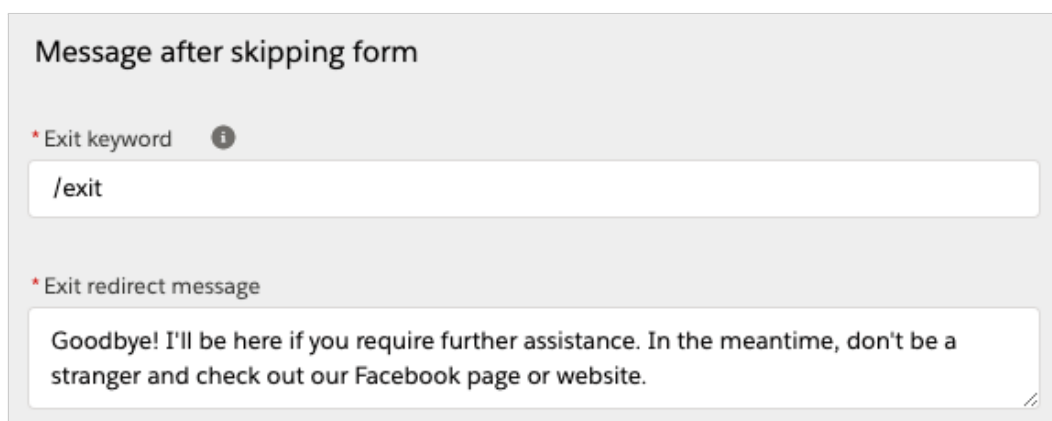
- * Notification email**: A text input field containing the email address "hello@doubleaxels.com".
- * Thank you message**: A text area containing the message "Awesome! We'll get in touch soon. In the meantime, don't be a stranger and check out our Facebook page or website!".

1. By filling in the **Notification email** field with your email, you or your business admin will receive a notification via email that the business page has just captured a new lead.

2. As for the **Thank you message**, it will be shown after the customer provides all the details in the welcome form.

3.3 Message After Skipping Form

As the bot prompts the Welcome form to the customer, the customer might also choose to skip this step right away. The settings can be configured in the **Message After Skipping Form** box.



The screenshot shows a configuration box titled "Message after skipping form". It contains two fields:

- * Exit keyword**: A text input field containing the keyword "/exit".
- * Exit redirect message**: A text area containing the message "Goodbye! I'll be here if you require further assistance. In the meantime, don't be a stranger and check out our Facebook page or website!".

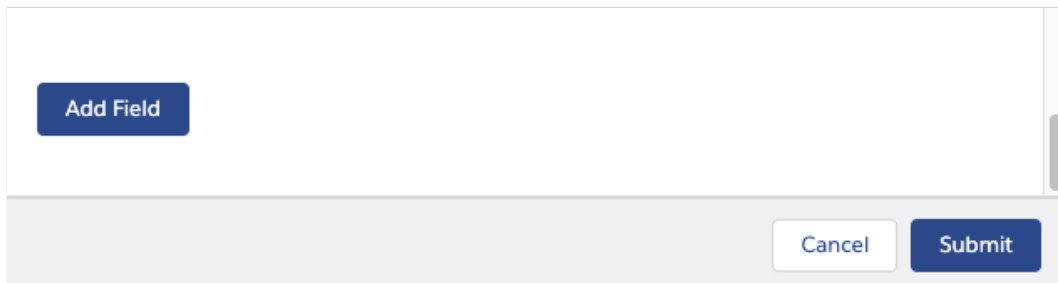
1. Fill in the **Exit keyword** field. If the customer types in the specified exit keyword, the form will be skipped to the exit redirect message.

2. In the **Exit redirect message** field box, type your crafted exit redirect message. This will be the response the customer receives after exiting the form.

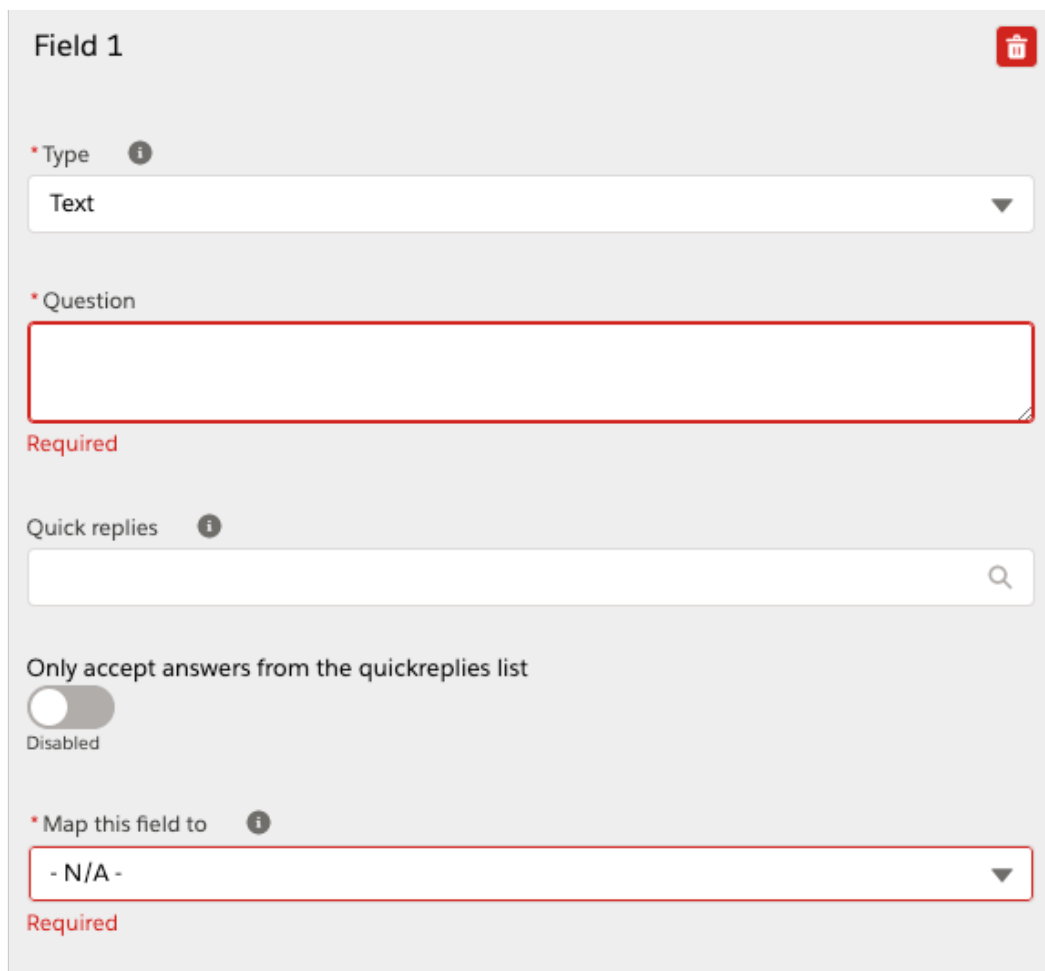
3.4 Fields

You can add form fields to get more information from your customer. These will appear between the welcome message and thank you message on the customer's end. Note that the form must contain at least one field.

To add fields, click the **Add Field** button on the bottom left of the dialog box.

A dialog box with a light gray background. At the top left, there is a blue button with the text "Add Field". At the bottom right, there are two buttons: a light gray "Cancel" button and a blue "Submit" button. The main area of the dialog box is empty, intended for a list of added fields.

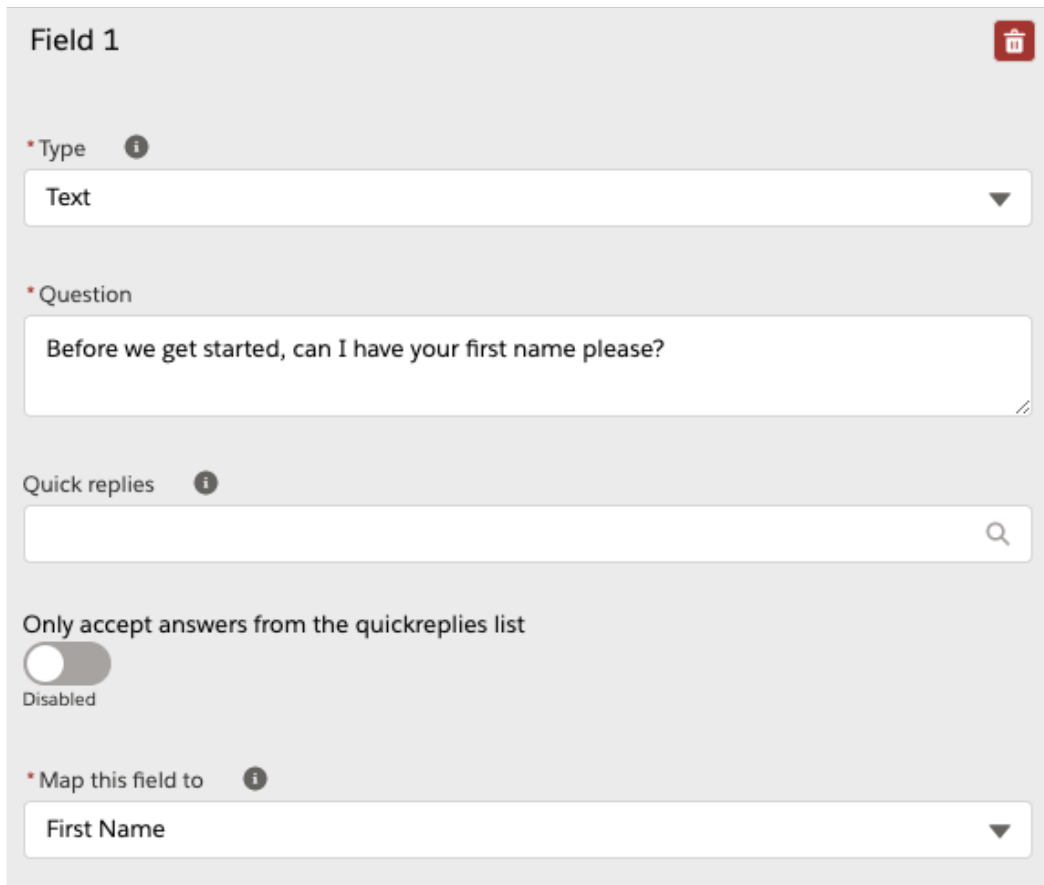
A box labelled "Field 1" will appear. Each new field added will be assigned a number in sequential order. To delete fields, click the  icon located at the top right of each field.

A form titled "Field 1" with a trash icon in the top right corner. The form contains several sections: 1. "* Type" with an information icon and a dropdown menu currently showing "Text". 2. "* Question" with a large empty text input field and a red "Required" label below it. 3. "Quick replies" with an information icon and a search input field with a magnifying glass icon. 4. "Only accept answers from the quickreplies list" with a toggle switch that is currently turned off (labeled "Disabled"). 5. "* Map this field to" with an information icon and a dropdown menu currently showing "- N/A -", with a red "Required" label below it.

Using the abovementioned bicycle shop as an example, you want to ask the customer for his/her personal information as part of your lead generation efforts.

Steps 1-6 will take you through the process of setting up the fields for first name, last name, type of information or updates the customer wants to receive, email and mobile phone number.

1. The first step is to ask for the customer's first name. To do this, add a new field (which will automatically be labelled **Field 1**).



The screenshot shows the configuration interface for 'Field 1'. It includes a title bar with a trash icon, and several sections: 'Type' with a dropdown menu set to 'Text'; 'Question' with a text input field containing 'Before we get started, can I have your first name please?'; 'Quick replies' with an empty search bar; a toggle switch for 'Only accept answers from the quickreplies list' which is currently disabled; and 'Map this field to' with a dropdown menu set to 'First Name'.

Select *Text* in the **Type** dropdown list. After that, type your message in the **Question** field.

Leave the **Quick replies** field empty.

In the **Map this field to** dropdown list, select *First Name*. In context, this dropdown list contains every field available in the company's Sales Cloud. By mapping the customer's input to these available fields, the lead would automatically be stored in your Salesforce account.

2. On to the next step, you want to ask for the customer's last name. To do this, add a new field (which will automatically be labelled **Field 2**).

Field 2 

*Type 
Text ▼

*Question
Thank you! Can I have your last name too?

Quick replies 

Only accept answers from the quickreplies list
☐ Disabled

*Map this field to 
Last Name ▼

Select **Text** in the **Type** dropdown list and type your message in the **Question** field.

Leave the **Quick replies** field empty.

In the **Map this field to** dropdown list, select *Last Name*.

3. In the next step, you want to ask which type of information and update the customer wants to receive regularly from your bicycle shop. This will require the customer to choose an answer from multiple options. To do this, add a new field (which will automatically be labelled **Field 3**).

Field 3

Type

Text

Question

It's great to meet you! What kind of information and updates would you like to receive from Double Axels?

Quick replies

Product Info

Events

Promotions

Only accept answers from the quickreplies list

☒

Enabled

Map this field to

Description

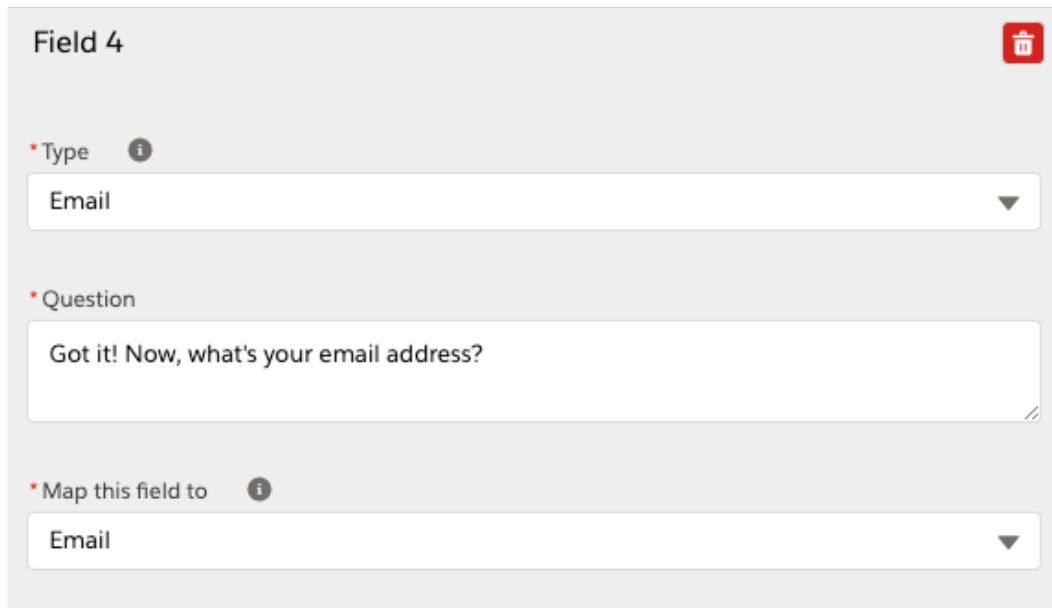
Select **Text** in the **Type** dropdown list and type the query in the **Question** field.

In the **Quick replies** field, simply type your quick reply and press enter. Do it repeatedly for the other quick replies. Please note that you can type a maximum of **10** different quick replies, and a 20-character limit for each quick reply.

By enabling **Only accept answers from the quickreplies list** switch, Messenger will not accept answers other than the quick replies and repeat prompting the query.

In the **Map this field to** field, select **Description**.

4. In the next step, you want to ask for the customer's email. To do this, add a new field (which will automatically be labelled **Field 4**).

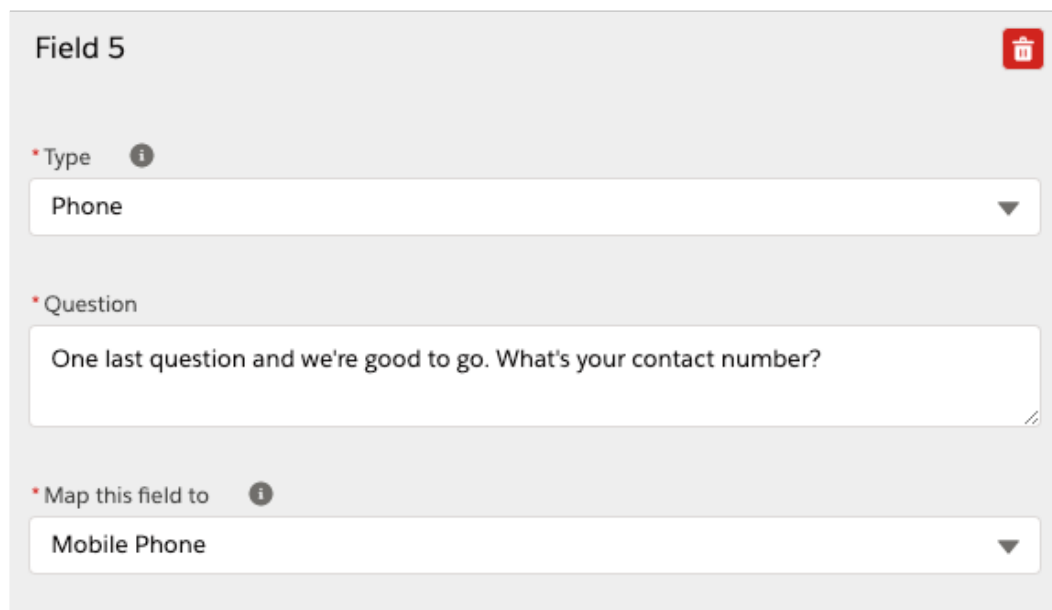


The screenshot shows the configuration interface for 'Field 4'. At the top left is the label 'Field 4' and at the top right is a red trash icon. Below this are three sections: 1. '* Type' with an information icon and a dropdown menu currently showing 'Email'. 2. '* Question' with a text input field containing the text 'Got it! Now, what's your email address?'. 3. '* Map this field to' with an information icon and a dropdown menu currently showing 'Email'.

Select *Text* in the **Type** dropdown list and type your message in the **Question** field.

In the **Map this field** to dropdown list, select *Email*.

5. Finally, you want to ask for the customer's phone number. To do this, add a new field (which will automatically be labelled **Field 5**).



The screenshot shows the configuration interface for 'Field 5'. At the top left is the label 'Field 5' and at the top right is a red trash icon. Below this are three sections: 1. '* Type' with an information icon and a dropdown menu currently showing 'Phone'. 2. '* Question' with a text input field containing the text 'One last question and we're good to go. What's your contact number?'. 3. '* Map this field to' with an information icon and a dropdown menu currently showing 'Mobile Phone'.

Select *Text* in the **Type** dropdown list and type your message in the **Question** field.

In the **Map this field** to dropdown list, select *Mobile Phone*.

6. Once all the fields have been created, click **Submit** to complete the Welcome Form setup.

A screenshot of a form builder interface. It features a large white rectangular area for editing a form, with a blue button labeled "Add Field" in the top-left corner. Below this area is a light gray footer bar containing two buttons: a white "Cancel" button and a blue "Submit" button.

Note

The screenshot below shows how the Welcome Form will look like on the customer's end.

A screenshot of a chat interface for "Double Axels Sports & Recreation". The chat window shows a series of messages from a virtual assistant named "Wheelie". The messages are as follows:

- 4:30 PM
- Hello! Thank you for reaching out. My name is Wheelie, Double Axel's virtual assistant. You may exit this conversation any time by typing '/exit' (no hard feelings!).
- Before we get started, can I have your first name please?
- Thank you! Can I have your last name too?
- It's great to meet you! What kind of information and updates would you like to receive from Double Axels?
- Got it! Now, what's your email address?
- One last question and we're good to go! What's your contact number?
- Awesome! We'll get in touch soon. In the meantime, don't be a stranger and check out our Facebook page or website!

On the right side of the chat window, there are input fields for the user's responses: "Hello", "Jolene", "Khim", "Product Info", "jolene.khim@gmail.com", and "91234567". The chat window also includes a header with the "Double Axels" logo and name, and a footer with social media icons and a text input field.

4. Contact Form Setup

Set up a form so that visitors can request to be contacted by a live agent. Customers might have other enquiries after skipping or completing the Welcome Form. This form is created to cater to such scenarios.

To complete the setup, please follow these instructions:

In the Setup Page, you will see that the **Contact Form Setup** is now active.

AiChat | Leads | Accounts | **AiChat Setup** | Lead Gen Forms | AiChat Reports

Complete all the steps below to start collecting leads on Facebook Messenger 75% Complete

- ✓ Account Setup**
Give AiChat the necessary permissions to access your org's information. [Change](#)
- ✓ Connect Facebook Page**
Give AiChat access to your Facebook Messenger so that it can start capturing leads automatically. [Go](#)
- ✓ Welcome Form Setup**
Set up a form to capture first-time visitor information in Salesforce. [Go](#)
- 4 Contact Form Setup**
Set up a form so that visitors can request to be contacted by a live agent. [Go](#)
- 5 More Settings**
Manage the settings and configuration for customer service support. [Go](#)

Click the **Go** button on the right side and the **Contact Form Setup** dialog box will pop up.

Contact Form Setup

Set up a form so that visitors can request to be contacted by a live agent.

Action After Submission

* Notification email ⓘ

* Thank you message

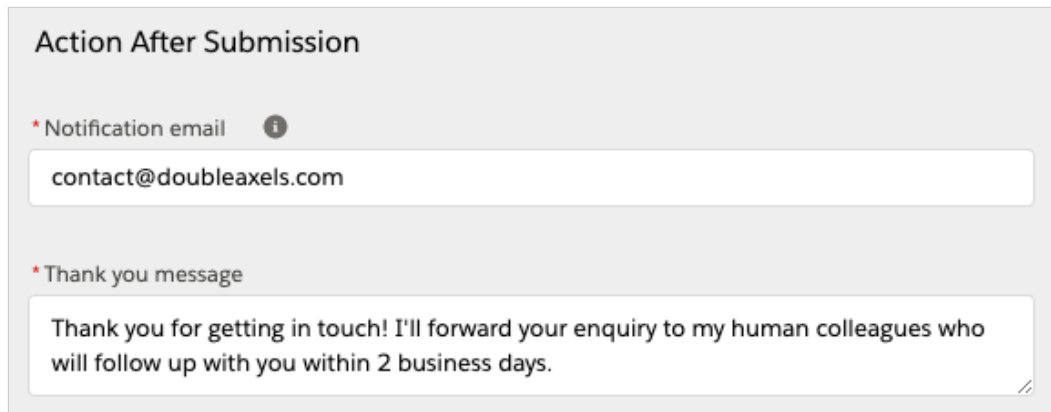
Message after skipping form

* Exit keyword ⓘ

[Cancel](#) [Submit](#)

4.1 Action After Submission

Configure what happens after the form has been submitted in the **Action After Submission** box.



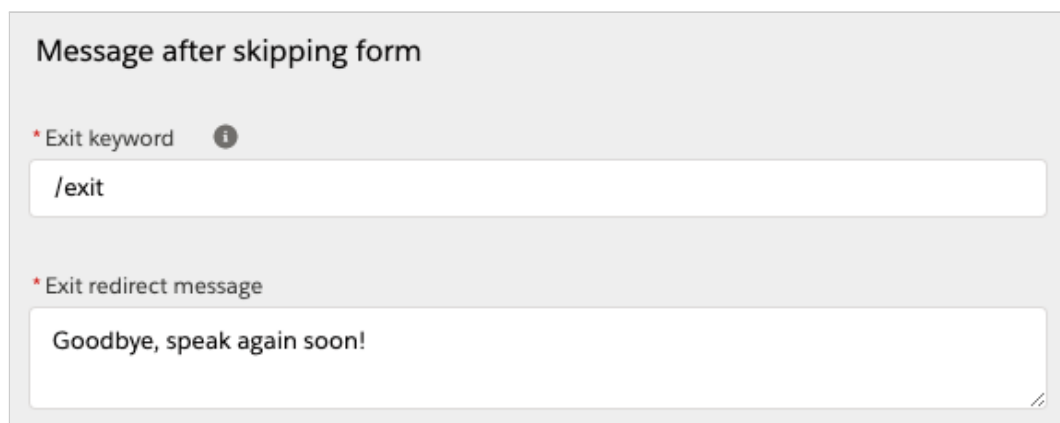
The screenshot shows a configuration box titled "Action After Submission". It contains two fields:

- * Notification email**: A text input field containing the email address "contact@doubleaxels.com".
- * Thank you message**: A text area containing the message "Thank you for getting in touch! I'll forward your enquiry to my human colleagues who will follow up with you within 2 business days."

1. By filling in the **Notification email** field with your email, you or your business admin will receive a notification via email that a customer has an inquiry.
2. As for the **Thank you message**, it is a confirmation message that the customer's enquiry has been acknowledged. This message will be seen on the customer's end.

4.2 Message After Skipping Form

The customer could also skip the contact form. The settings can be configured in the **Message After Skipping Form** box.



The screenshot shows a configuration box titled "Message after skipping form". It contains two fields:

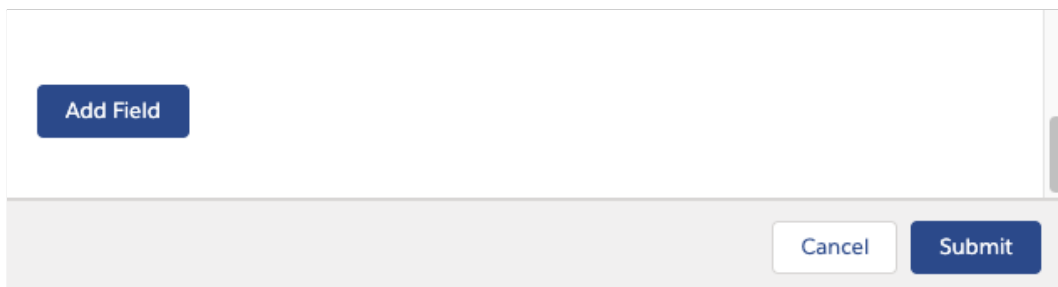
- * Exit keyword**: A text input field containing the keyword "/exit".
- * Exit redirect message**: A text area containing the message "Goodbye, speak again soon!".

1. Fill in the **Exit keyword** field. If the customer types in the specified exit keyword, the form will be skipped to the exit redirect message.
2. In the **Exit redirect message** field box, type your crafted exit redirect message. This will be the response the customer receives after exiting the form.

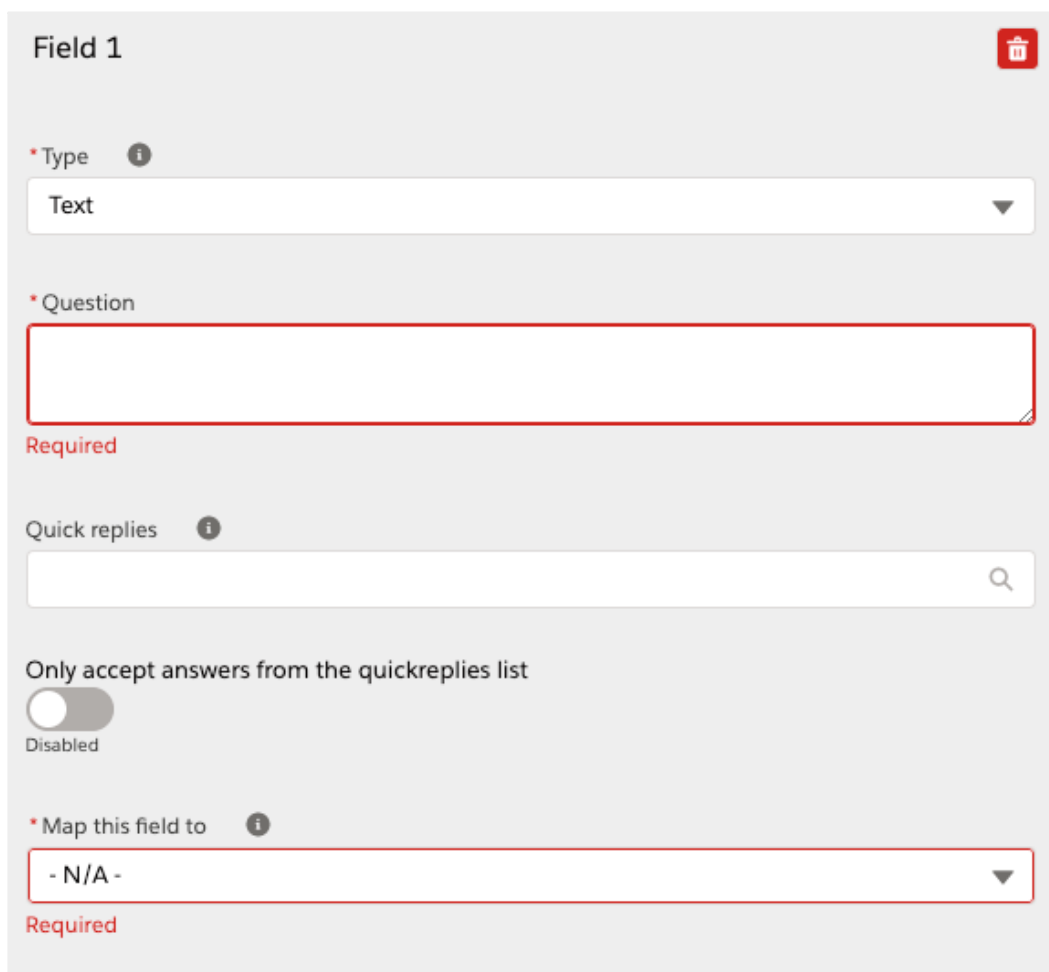
4.3 Fields

You can add more fields to get the customer's enquiries and information. These will appear before the thank you message on the customer's end.

To add fields, click the **Add Field** button on the bottom left of the dialog box.

A dialog box with a light gray background. In the top left corner, there is a blue button with the text "Add Field". In the bottom right corner, there are two buttons: a light gray "Cancel" button and a blue "Submit" button.

A box labelled "Field 1" will appear. Each new field added will be assigned a number in sequential order. To delete fields, click the  icon located at the top right of each field.

A form titled "Field 1" with a red trash icon in the top right corner. The form has several sections: 1. "Type" section with a dropdown menu currently showing "Text". 2. "Question" section with a large text input field. 3. "Required" label in red text below the question field. 4. "Quick replies" section with a search input field and a magnifying glass icon. 5. "Only accept answers from the quickreplies list" section with a toggle switch currently in the "Disabled" position. 6. "Map this field to" section with a dropdown menu currently showing "- N/A -". 7. "Required" label in red text below the mapping dropdown. Each section has an information icon (i) next to its label.

Using the abovementioned bicycle shop as an example, you want to ask the customer for his/her personal information so you or your business admin can do a follow-up.

Steps 1-2 will take you through the process of setting up the fields for inquiry submission and email.

1. You would want the customer to submit his/her inquiry. To do this, add a new field (which will automatically be labelled **Field 1**).

Field 1 

* Type 

Text ▼

* Question

Don't be shy! Send us all the details we need to resolve your concern or inquiry.

Quick replies 

Only accept answers from the quickreplies list

☐ Disabled

* Map this field to 

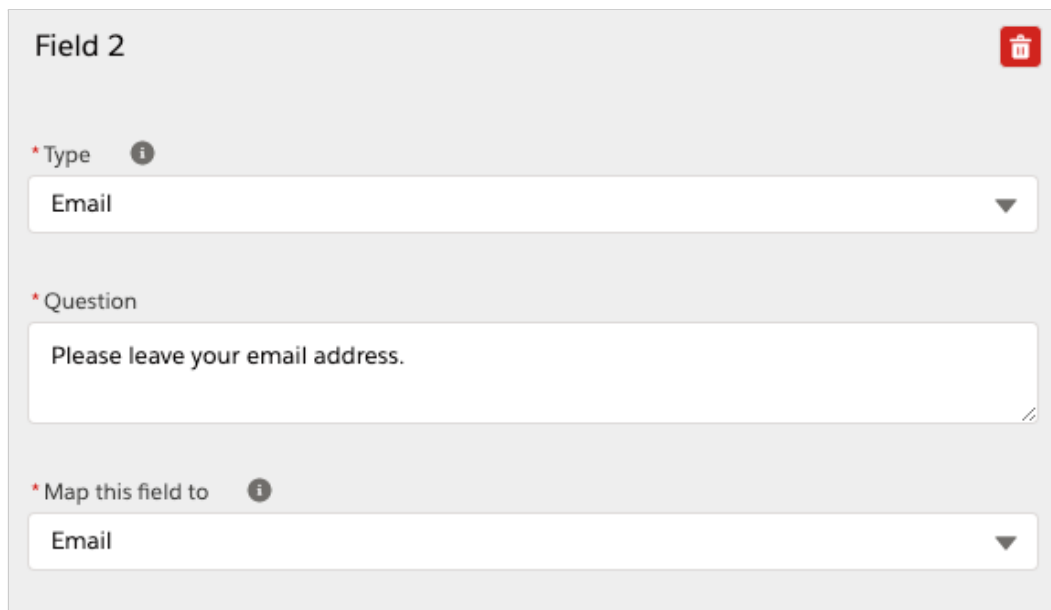
Description ▼

Select **Text** in the **Type** dropdown list. After that, type your message in the **Question** field.

Leave the **Quick replies** field empty.

Then in the **Map this field to** dropdown list, select *Description*.

2. On to the next step, you want to ask for the customer's email. To do this, add a new field (which will automatically be labelled **Field 2**).

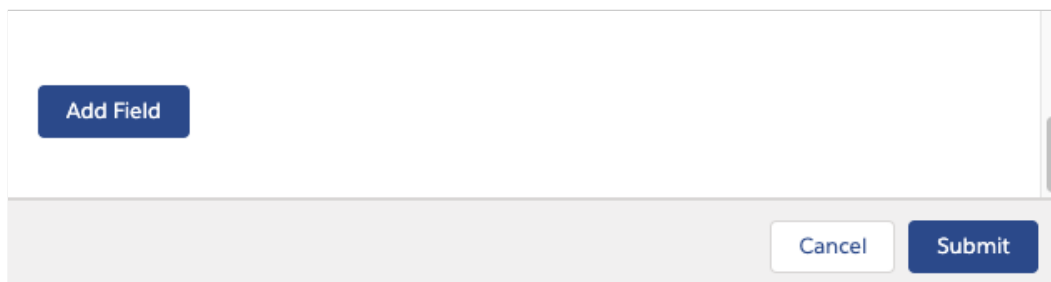


The screenshot shows a configuration window titled "Field 2" with a red trash icon in the top right corner. It contains three sections: 1. "* Type" with an information icon and a dropdown menu currently showing "Email". 2. "* Question" with a text input field containing the text "Please leave your email address." and a small edit icon at the bottom right. 3. "* Map this field to" with an information icon and a dropdown menu currently showing "Email".

Select *Text* in the **Type** dropdown list and type your message in the **Question** field.

In the **Map this field to** dropdown list, select *Email*.

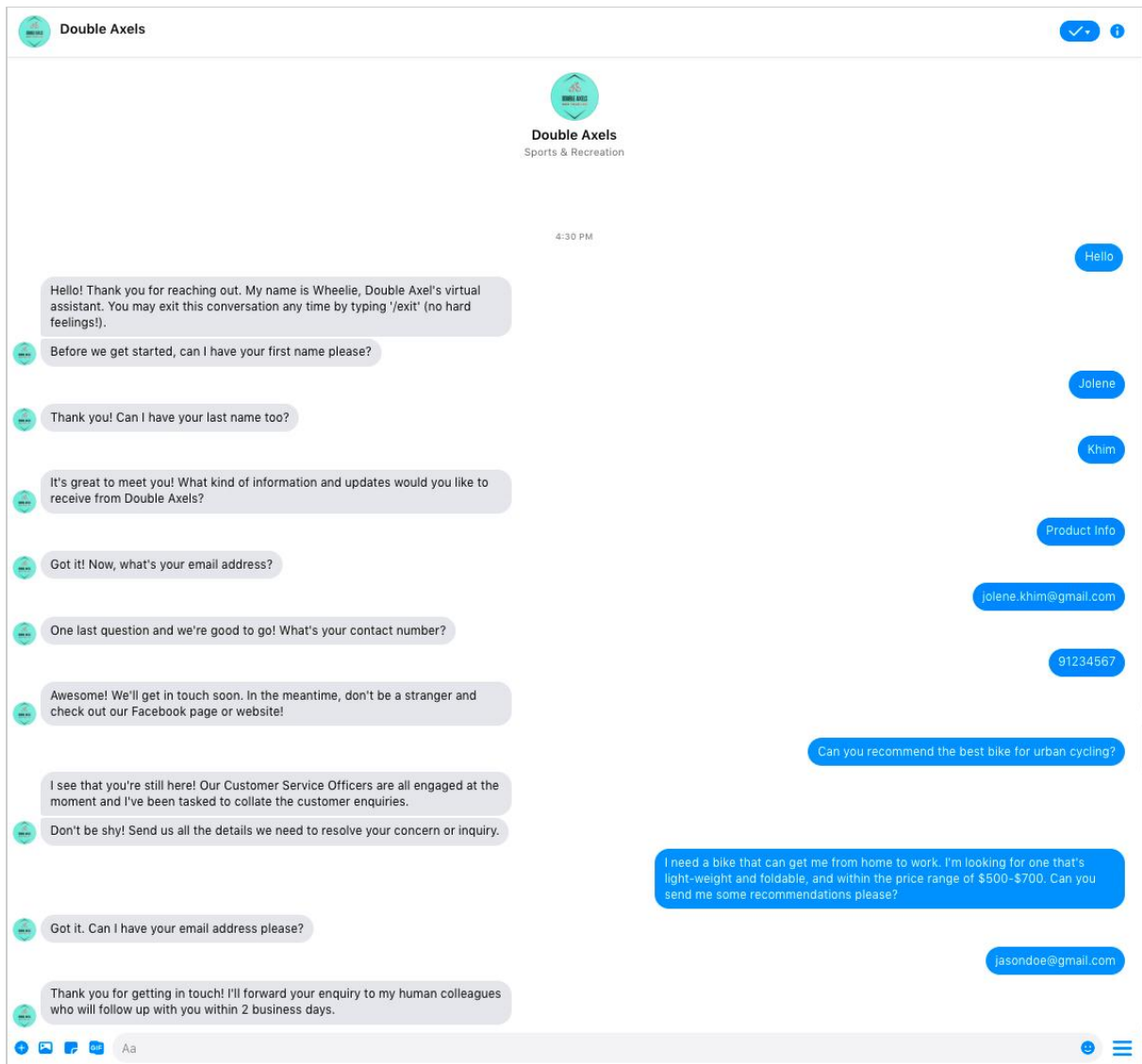
3. Once all the fields have been created, click **Submit** to complete the Contact Form setup.



The screenshot shows the bottom portion of the configuration window. It features a blue "Add Field" button on the left. On the right, there are two buttons: a light blue "Cancel" button and a dark blue "Submit" button.

Note

The screenshot below shows how the Contact Form will look like on the customer's end.



5. More Settings

You can modify other configurations in the **More settings** menu. For example, you want to set an automated response message when your Customer Service Officers are not available.

To modify the settings, please follow the instructions:

1. In the Setup Page, you will see that **More Settings** is now active.

Complete all the steps below to start collecting leads on Facebook Messenger 100% Complete

- ✓ **Account Setup**
Give AiChat the necessary permissions to access your org's information. Change
- ✓ **Connect Facebook Page**
Give AiChat access to your Facebook Messenger so that it can start capturing leads automatically. Go
- ✓ **Welcome Form Setup**
Set up a form to capture first-time visitor information in Salesforce. Go
- ✓ **Contact Form Setup**
Set up a form so that visitors can request to be contacted by a live agent. Go
- 5 **More Settings**
Manage the settings and configuration for customer service support. Edit

Click the **Edit** button on the right side and the **More Settings** dialog box will pop up.

More Settings

Manage the settings and configuration for customer service support.

* Interval before triggering Contact Form ⓘ

minute(s)

* Automated message before Contact Form

Sorry, our Customer Service Officers are all engaged at the moment. Would you like to leave your details so that we can contact you later?

Required

* Interval before bot resumes ⓘ

hour(s)

Cancel
Submit

2. Your customers might take the initiative to start another chat (usually enquiries) after skipping or completing the Welcome Form. Set a delay between the customer's new message and when the Contact Form will be shown by entering the duration in the **Interval before triggering Contact Form** field.

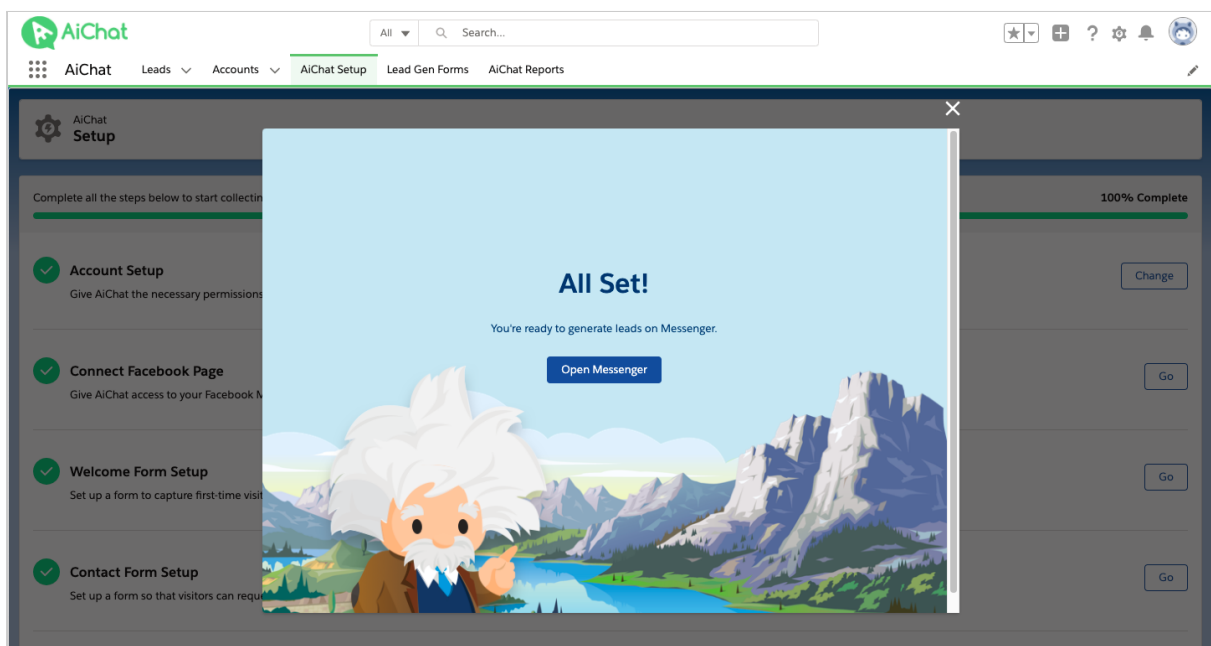
3. As chat routing is not a feature of the AiChat Lead Capture App, there needs to be a message to inform customers that your Customer Service Officers are not available.

Type your message in the **Automated message before Contact Form** field. The customer will see this message first before the Contact Form.

4. While your customer is chatting with the live agent, the bot should be set to pause for a certain duration of time so it does not interrupt the live chat. In the **Interval before bot resumes** field, enter the hours preferred.

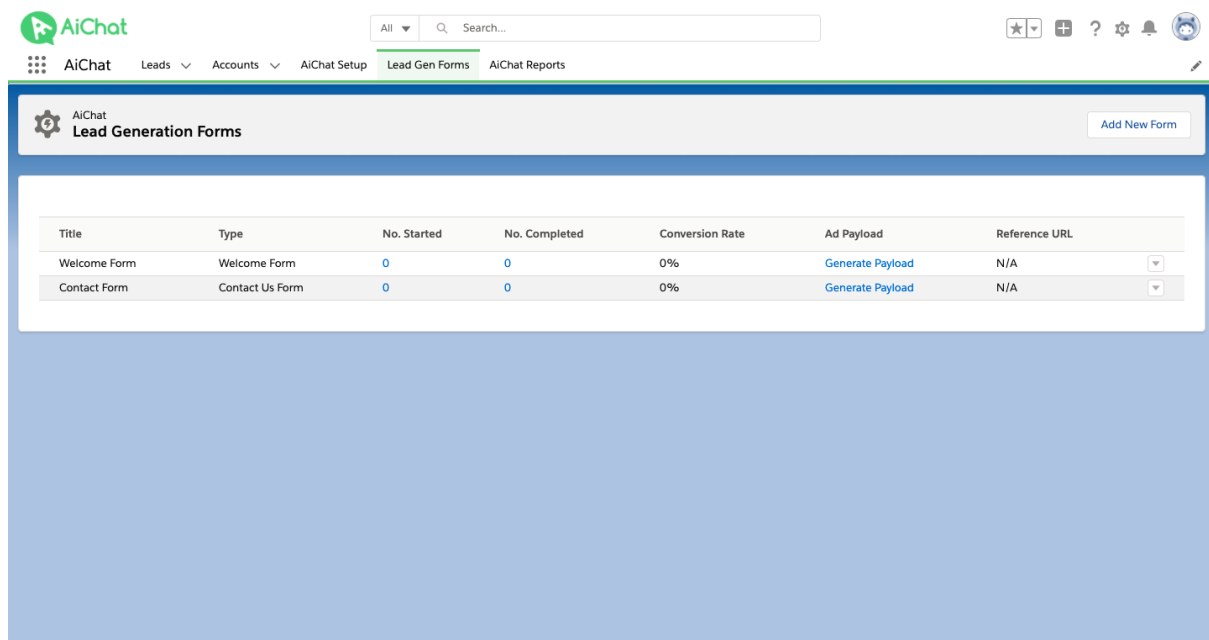
The pause starts from the customer's last message. Once the time limit is passed, automated messaging will resume.

5. Now the setups are all completed. You will see a pop-up indicating that you are ready to create lead capture tasks for your business.



Setting up a new lead capture form

All the lead generation forms are stored in the AiChat Lead Capture app. You can access these forms by clicking the **Lead Gen Forms** tab.



Title	Type	No. Started	No. Completed	Conversion Rate	Ad Payload	Reference URL
Welcome Form	Welcome Form	0	0	0%	Generate Payload	N/A
Contact Form	Contact Us Form	0	0	0%	Generate Payload	N/A

You can see the existing lead generation forms listed under Title and Type. Meanwhile, the other columns contain more information related to the forms, namely:

- **No. Started:** The amount of times a lead form is accessed by the users targeted by the ad
- **No. Completed:** The amount of times a lead form is filled out from start to finish. In other words, users that manage to complete the form are converted into leads for your business.
- **Conversion Rate:** The percentage of users who have completed the leads form. It is calculated by dividing the No. of Forms Completed by the No. of Forms Started and converting the figure into a percentage. Check the formula below:

$$\text{Conversion Rate} = (\text{No. of Forms Completed} / \text{No. of Forms Started}) * 100\%$$

1. Create a new leads generation form

Besides the Welcome Form and Contact Form that you set up earlier, you can create multiple leads generation forms for your business needs. These forms are only presented to visitors over a special 'referral' link.

To create a new form, please follow these instructions. This is an example of a form for a cycling event called the "Cycle360 Charity Event", where traffic comes from a Click-to-Messenger ad (more details in [Section 1.6](#)).

AiChat

Leads

Accounts

AiChat Setup

Lead Gen Forms

AiChat Reports

All

Search...

★

+

?

⚙

🔔

👤

⚙

AiChat

Lead Generation Forms

Add New Form

Title	Type	No. Started	No. Completed	Conversion Rate	Ad Payload	Reference URL
Welcome Form	Welcome Form	0	0	0%	Generate Payload	N/A
Contact Form	Contact Us Form	0	0	0%	Generate Payload	N/A

Click **Add New Form** at the top right. The **Edit Form** dialog box will pop up.

Add New Form

General Information

* Title ⓘ

Enter title

* Referral Link ⓘ

https://m.me/100493738734060/

Enter referral link

* Synchronise this form with ⓘ

Select an Option

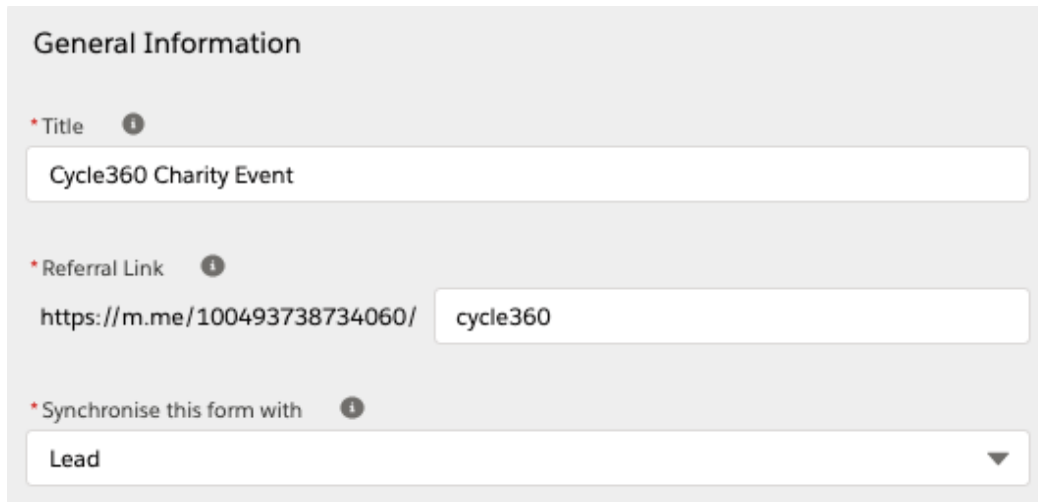
Start / End Date

Cancel

Submit

1.1 General Information

Fill in the general details of the form in the **General Information** box.

A screenshot of a web form titled "General Information". It contains three fields: "Title" with the value "Cycle360 Charity Event", "Referral Link" with the value "https://m.me/100493738734060/cycle360", and "Synchronise this form with" with a dropdown menu showing "Lead". Each field has an asterisk and an information icon to its left.

General Information

* Title ⓘ
Cycle360 Charity Event

* Referral Link ⓘ
https://m.me/100493738734060/ cycle360

* Synchronise this form with ⓘ
Lead ▼

1. Enter the **Title** of the leads generation form.
2. Enter the **Referral Link** of the lead generation form. This link can be embedded in marketing collaterals including, but not limited to, Facebook ads, SMS, and electronic direct mails (EDMs). It provides customers a direct link to this form.
3. You will also be required to synchronize the new form. Select Lead from the **Synchronize this form with** dropdown list.

1.2 Start / End Date

If your business campaign is running for a certain length of time, you can set the dates in the **Start / End Date** box. Please ensure that **Set start / end date for this form** is enabled, so the **Start date** and **End date** fields will appear.

Start / End Date

Set start / end date for this form

☒ Enabled

Start date

4/18/2021

Start time

00:00

End date

4/30/2021

End time

00:00

Form expired message

Registration for the Cycle360 Charity Event has closed! Follow our Facebook page for the latest updates from us!

1. In the **Start date** field, click the calendar icon and set the exact date. Set a time in the **Start time** field. The leads generation form will be accessible to customers starting from this date and time.
2. Once you set the date and time in the **End date** and **End Time** fields respectively, the same form will also expire after that date.
3. You can also type in a fallback message in the **Form expired message** field. If customers, by any chance, accessed the referral link to the form after the campaign is over, this message would be shown instead.
4. In the **Action After Submission** segment, fill in the **Notification email** and **Thank you message** fields. By filling the notification email field with your email, you or your business admin will receive a notification via email that the business page has just captured a new lead.

1.3 Action After Submission

Action After Submission

* Notification email ⓘ

hello@doubleaxels.com

* Thank you message

Thank you for your interest in Cycle360! We'll send you a confirmation email once we have verified your information.

Show gated content after form is completed

☐ Disabled

1. By filling in the **Notification email** field with your email, you or your business admin will receive a notification via email that a lead has been captured.
2. As for the **Thank you message**, it will be shown after the customer provides all the details.

Show gated content after form is completed

☒ Enabled

* Download button label ⓘ

Download

Attach file



 ODFdnMILatDPHLB.VxsA78Omubvf4nn...

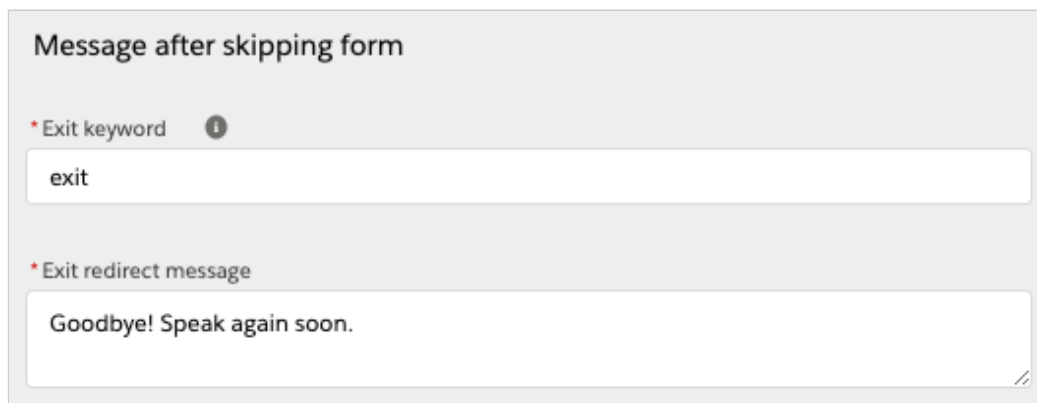


or drop file here

3. You may choose to send additional content after the customer has completed the form. Enable **Show gated content after form is completed** and type in the button label (e.g. "Download").
4. Upload the content and attach it to the form by clicking the **Upload File** button.

1.4 Message after skipping form

As the bot prompts the welcome form to the customer, the customer might also choose to skip right away.



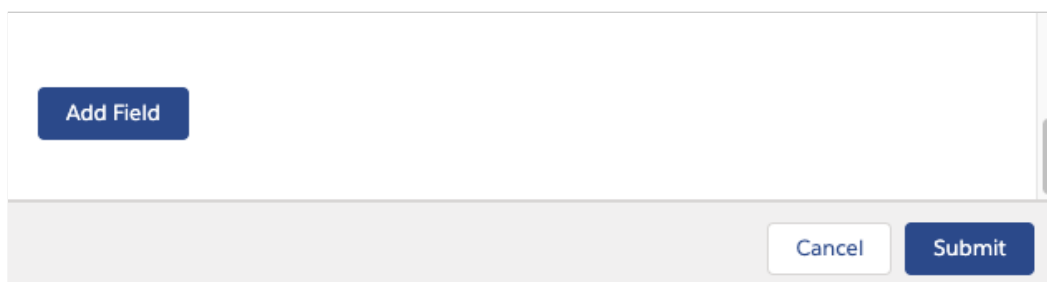
The screenshot shows a dialog box titled "Message after skipping form". It contains two fields: "Exit keyword" with the value "exit" and "Exit redirect message" with the value "Goodbye! Speak again soon.".

1. Fill in the **Exit keyword** field. If the customer types in the specified exit keyword, the form will be skipped to the exit redirect message.
2. In the **Exit redirect message** field box, type your crafted exit redirect message. This will be the response the customer receives after exiting the form.

1.5 Fields

You can add more queries to get more information from your customer or in this example case, the participant of the cycling event. These will appear between the welcome message and thank you message on the customer's end.

To add fields, click the **Add Field** button on the bottom left of the dialog box.



The screenshot shows a dialog box with a large empty text area for adding fields. At the bottom left is a blue "Add Field" button. At the bottom right are "Cancel" and "Submit" buttons.

A box labelled "Field 1" will appear. Each new field added will be assigned a number in sequential order. To delete fields, click the  icon located at the top right of each field.

Field 1

* Type

Text

* Question

Required

Quick replies

Only accept answers from the quickreplies list

Disabled

* Map this field to

- N/A -

Required

Using the abovementioned Cycle360 event as an example, you want to ask for the customer for his/her personal information as part of your lead generation efforts.

Steps 1-5 will take you through the process of setting up the fields for first name, last name, preferred race category, email and mobile phone number.

1. The first step is to ask for the customer's first name. To do this, add a new field (which will automatically be labelled **Field 1**).

Field 1

* Type

Text

* Question

That's a great decision! Can I have your first name please?

Quick replies

Only accept answers from the quickreplies list

Disabled

* Map this field to

First Name

Select *Text* in the **Type** dropdown list. After that, type your message in the **Question** field.

Leave the **Quick replies** field empty.

Then in the **Map this field to** dropdown list, select *First Name*.

2. On to the next step, you want to ask for the customer's last name. To do this, add a new field (which will automatically be labelled **Field 2**).

Field 2 

* Type 
Text ▼

* Question
And your last name too.

Quick replies 

Only accept answers from the quickreplies list
☐ Disabled

* Map this field to 
Last Name ▼

Select *Text* in the **Type** dropdown list and type your message in the **Question** field.

Leave the **Quick replies** field empty.

In the **Map this field to** dropdown list, select *Last Name*.

3. In the next step, you want to ask for the race category the customer wishes to participate in. This will require the customer to choose from the multiple options. To do this, add a new field (which will automatically be labelled **Field 3**).

The screenshot shows the configuration for 'Field 3' in a chatbot interface. It contains the following elements:

- Field 3**: The title of the field, with a red trash icon in the top right corner.
- * Type**: A dropdown menu currently set to 'Text'.
- * Question**: A text input field containing the question 'Select the race category you'd like to take part in.' with a small edit icon on the right.
- Quick replies**: A section with a search bar and a list of quick replies: 'Beginner', 'Intermediate', and 'Advanced', each with a close (X) button.
- Only accept answers from the quickreplies list**: A toggle switch that is currently turned on (blue) with a checkmark, labeled 'Enabled'.
- * Map this field to**: A dropdown menu currently set to 'Description'.

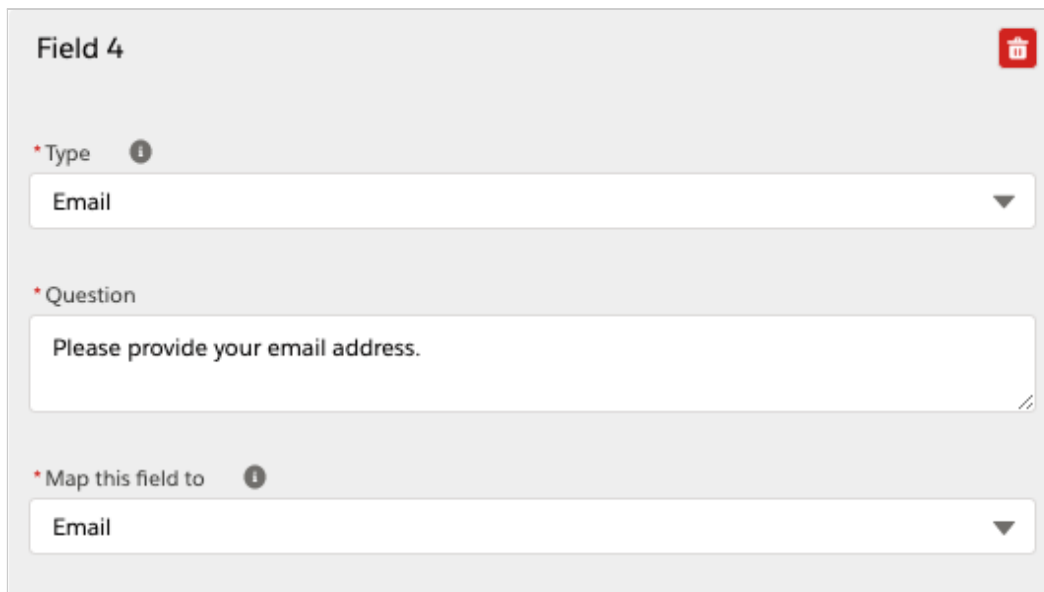
Select *Text* in the **Type** dropdown list and type the query in the **Question** field.

In the **Quick replies** field, simply type your quick reply and press enter. Do it repeatedly for the other quick replies. Please note that you can type a maximum of **10** different quick replies, and a 20-character limit for each quick reply.

By enabling **Only accept answers from the quickreplies list** switch, Messenger will not accept answers other than the quick replies and repeat prompting the query.

In the **Map this field to** field, select Description.

4. In the next step, you want to ask for the customer's email. To do this, add a new field (which will automatically be labelled **Field 4**).



The screenshot shows the configuration interface for 'Field 4'. It has a title bar 'Field 4' with a red trash icon on the right. Below the title bar are three sections:

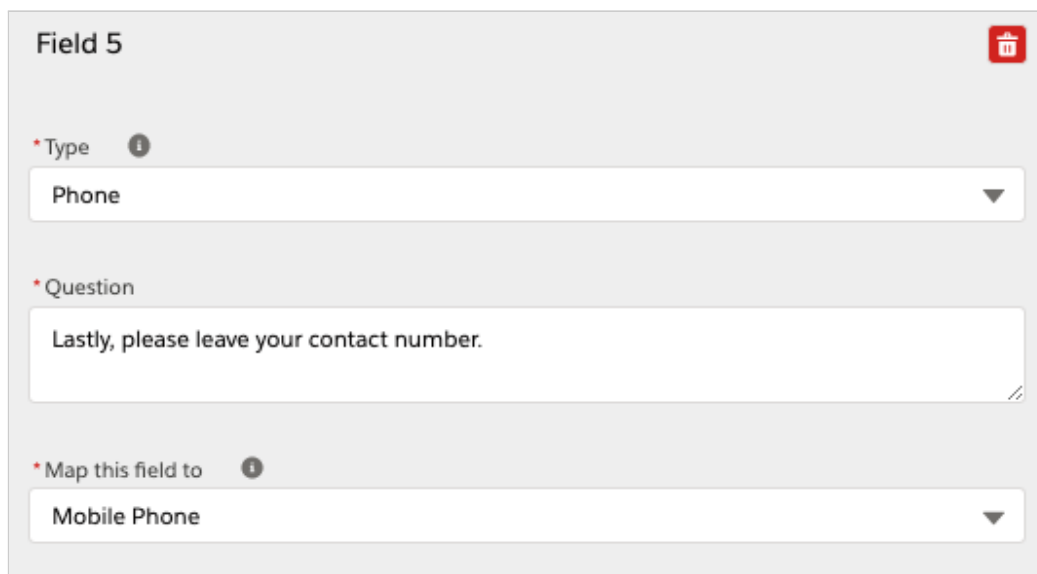
- *Type**: A dropdown menu currently showing 'Email'.
- *Question**: A text input field containing the message 'Please provide your email address.' with a small edit icon on the right.
- *Map this field to**: A dropdown menu currently showing 'Email'.

 Each section has a small information icon (i) to its right.

Select *Text* in the **Type** dropdown list and type your message in the **Question** field.

In the **Map this field to** dropdown list, select *Email*.

5. Finally, you want to ask for the customer's phone number. To do this, add a new field (which will automatically be labelled **Field 5**).



The screenshot shows the configuration interface for 'Field 5'. It has a title bar 'Field 5' with a red trash icon on the right. Below the title bar are three sections:

- *Type**: A dropdown menu currently showing 'Phone'.
- *Question**: A text input field containing the message 'Lastly, please leave your contact number.' with a small edit icon on the right.
- *Map this field to**: A dropdown menu currently showing 'Mobile Phone'.

 Each section has a small information icon (i) to its right.

Select *Text* in the **Type** dropdown list and type your message in the **Question** field.

In the **Map this field to** dropdown list, select *Mobile Phone*.

6. Click **Submit** button to save the new form you created. Back on the **Lead Generation Forms** page, you will see a new form (Cycle360 Charity Event) listed.

All Search... AiChat Leads Accounts AiChat Setup Lead Gen Forms AiChat Reports						
Add New Form						
Title	Type	No. Started	No. Completed	Conversion Rate	Ad Payload	Reference URL
Welcome Form	Welcome Form	0	0	0%	Generate Payload	N/A
Contact Form	Contact Us Form	0	0	0%	Generate Payload	N/A
Cycle360 Charity Event	Ads Lead Gen	0	0	0%	Generate Payload	View URL

1.6 Click-to-Messenger Ad

On the customers’ end, what they will see first is the Click-to-Messenger ad in their Facebook feed.



Double Axels
Sponsored · 

Calling all leisure riders and seasoned cyclists! Join us at the Cycle360 charity event and have fun while supporting a great cause! Proceeds will go to the New Avenue Foundation to provide assistance to youths at risk.

 27 Mar, 5pm

 F1 Pit Building



Organized by


CYCLE360
CHARITY EVENT
27 March, 5pm | F1 Pit Building

MESSENGER
Pedal for a cause 

 **Sign Up**

 Like

 Comment

 Share

Clicking the **Sign Up** button on the ad leads customers to Messenger, and the first message they get in Messenger is “Hey there! Cycle360...” and the CTA (**Count me in** button) that leads to the form.

In order to enable access to the form, it is mandatory to ‘load’ the form in the ad. Thus we need to configure it first in Facebook Ads Manager by inserting a payload script into the **Bot Payload** field.

Greeting

Welcome people to the conversation after they tap on your ad.

Start Conversations Template Greeting Dropdown

Text Only

Text

Hey there! Cycle360 is back for a third year and we're thrilled to gather fellow cycling enthusiasts together for a good cause. Tap the button if you'd like to be part of the event!

Customer Actions

Suggest questions or replies for customers to tap, or use a button to send people to your site.

Start Conversations Customer Actions Dropdown

Buttons

Button # 1

COUNT ME IN 11/20

Action

Send a postback

Bot Payload

Optional: This will be sent back to your webhook.

+ Add a Button

This message may look different across devices. Select "Preview in Messenger" to send it to your device.

You can obtain this script from the **Lead Generation Forms** tab in the AiChat Lead Capture app. Simply click **Generate Payload** under the Ad Payload column of the "Cycle360 Charity Event" form.

AiChat Lead Generation Forms						
Title	Type	No. Started	No. Completed	Conversion Rate	Ad Payload	Reference URL
Welcome Form	Welcome Form	0	0	0%	Generate Payload	N/A
Contact Form	Contact Us Form	0	0	0%	Generate Payload	N/A
Cycle360 Charity Event	Ads Lead Gen	0	0	0%	Generate Payload	N/A

Copy the script and paste it into the **Bot Payload** field in Ads Manager before publishing your ad.

Ad Payload

Click the button below to copy the payload

```
{"type": "content", "id": 1}
```

Copy Payload

Note

The screenshot below shows how the Cycle360 Charity Event lead generation form will look like on the customer's end.

Double Axels

Typically replies instantly
Sports & Recreation

6:31 PM

You opened this conversation through an ad.
When you reply, Double Axels will see your public info and which ad you clicked.

Hey there! Cycle360 is back for a third year and we're thrilled to gather fellow cycling enthusiasts together for a good cause. Tap the button if you'd like to be part of the event!

Count me in

That's a great decision! Can I have your first name please?

Mandy

And your last name too.

Smith

Select the race category that you'd like to take part in.

Beginner

Please provide your email address.

mandythegreat@gmail.com

Lastly, please leave your contact number.

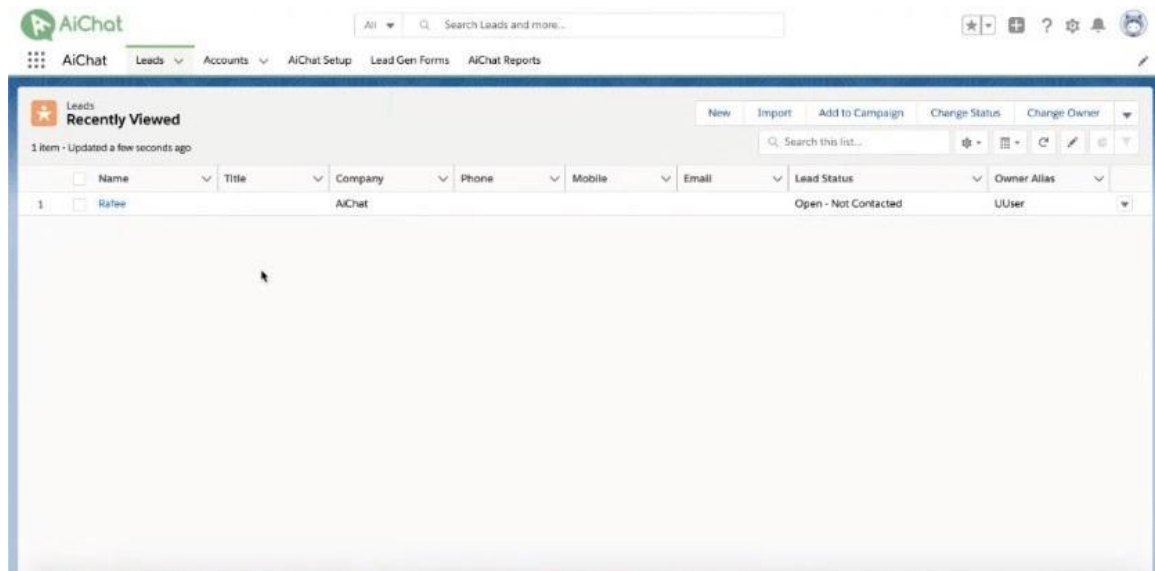
80010008

Thank you for your interest in Cycle360! We'll send you a confirmation email once we have verified your information. Follow us on Facebook or Instagram for the latest updates.

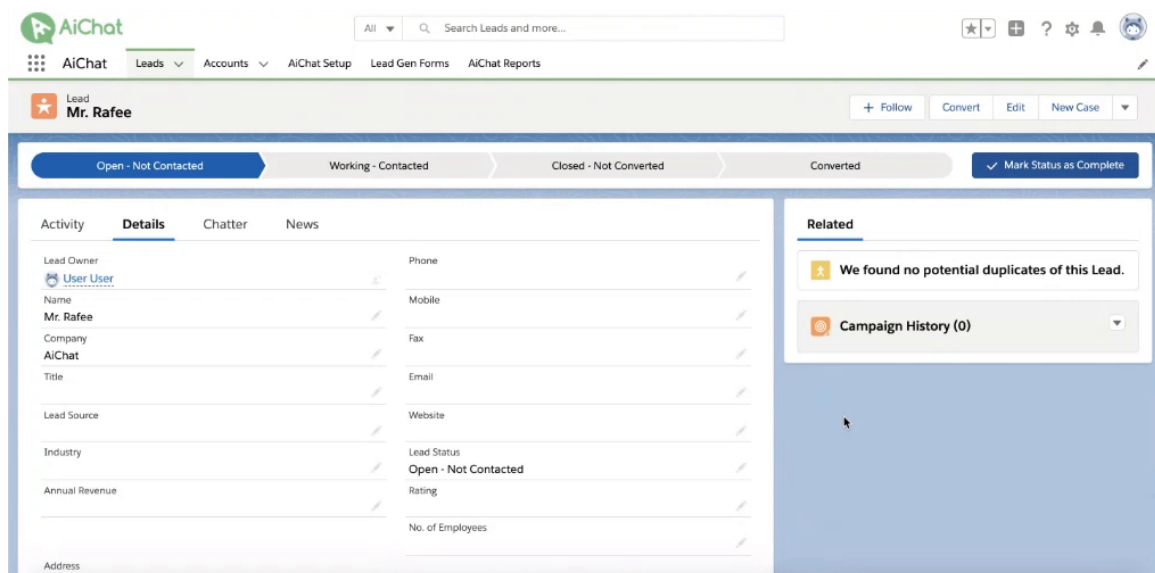
2. Check the details of the leads captured

You can also check the details of the leads you captured by the forms. To do so, please follow these instructions:

1. On the AiChat Lead Capture App page, click the **Leads** tab. You will see a list of leads that you captured via Facebook.



2. To see the details of a lead you captured, click the lead's name. You will be redirected to the lead's page.



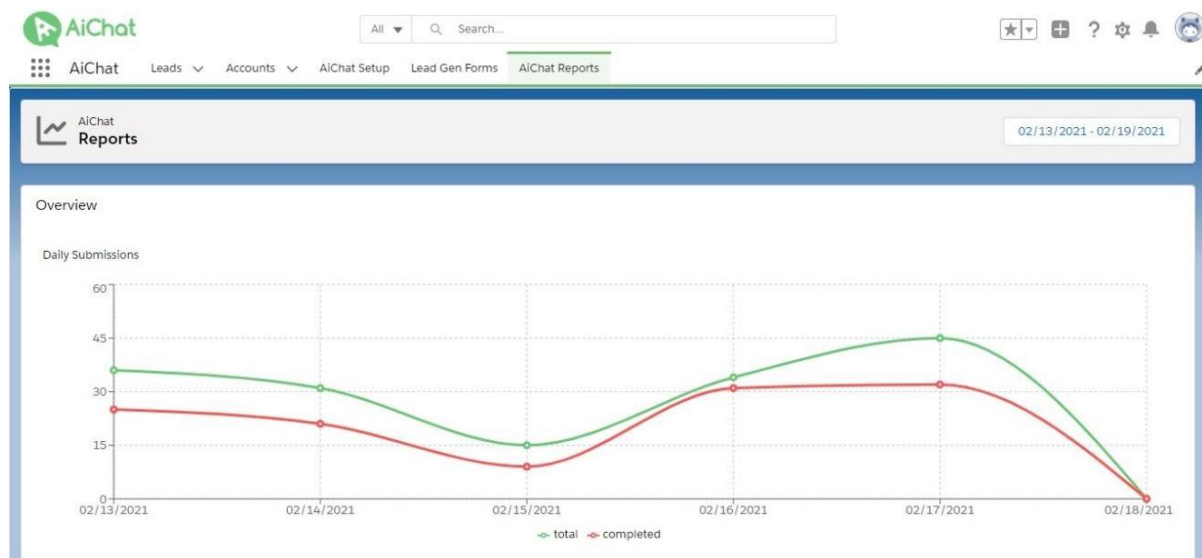
Since the forms created have the customer's information mapped to Salesforce, the same information appears in the details.

Generating leads report

As the person who runs a business, you would want to review the performance of the leads generation forms and use them to decide what steps your business needs to take in the future.

To generate the leads report, please follow these instructions:

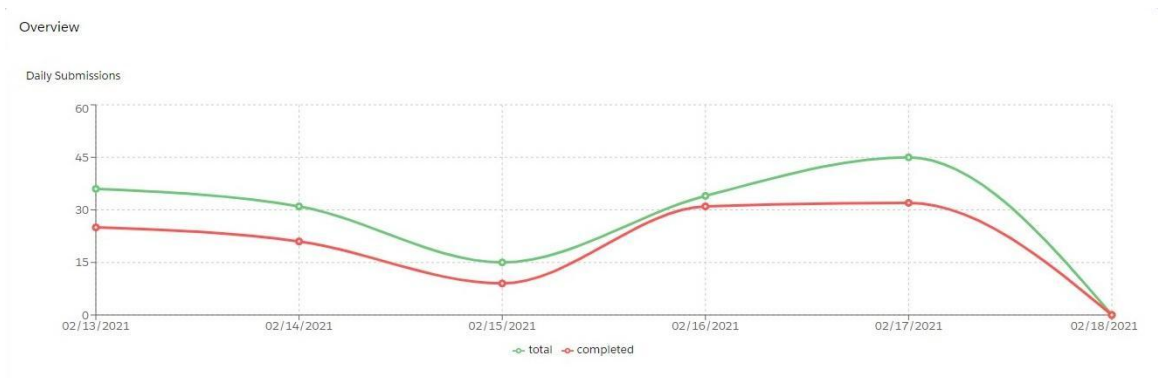
1. Click the **AiChat Reports** tab, and you will see the **Reports** page. This page contains the charts of all the leads captured.



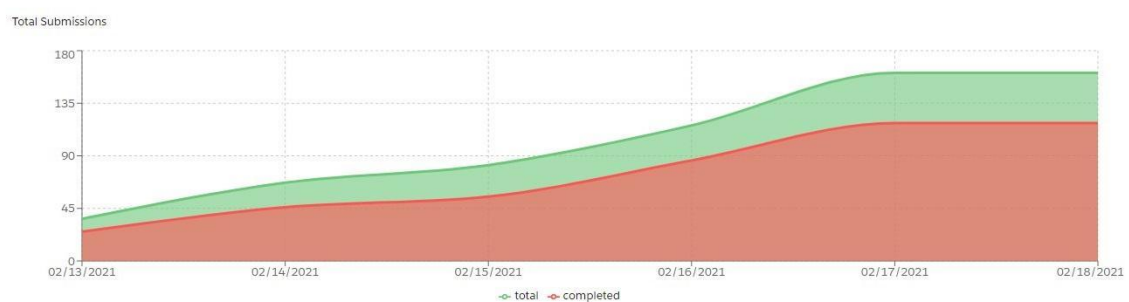
2. You can opt to see the leads captured on a certain date range. Simply click the Date Range button at the top right and filter the dates as you preferred.

The screenshot shows the 'Filter Report' dialog box. It has a 'Filter Report' title and a 'Today' button. Below the title, there are several date range options: 'Yesterday', 'This Week', 'Last Week', 'This Month', and 'Last Month'. A calendar for February 2021 is displayed, with the date range 'Feb 13, 2021' to 'Feb 19, 2021' selected. The calendar shows the days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and the dates (1 through 28). The dates 13, 14, 15, 16, 17, 18, and 19 are highlighted in blue. At the bottom of the dialog, there are 'Cancel' and 'Apply' buttons.

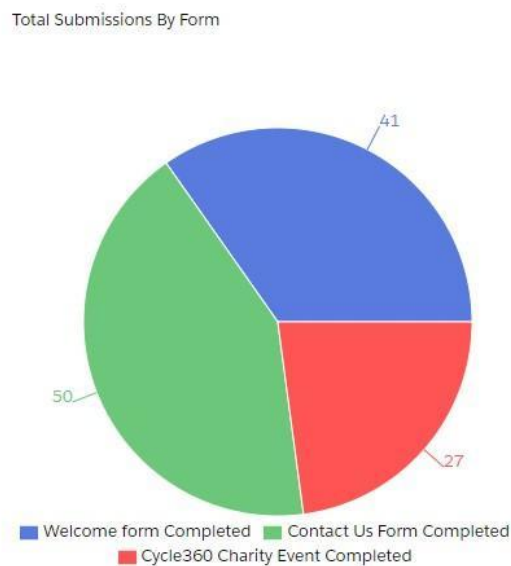
3. In the **Overview** segment, the charts encompasses all the leads generation forms you created. The **Daily Submissions** chart shows the total number of forms prompted and the number of forms completed.



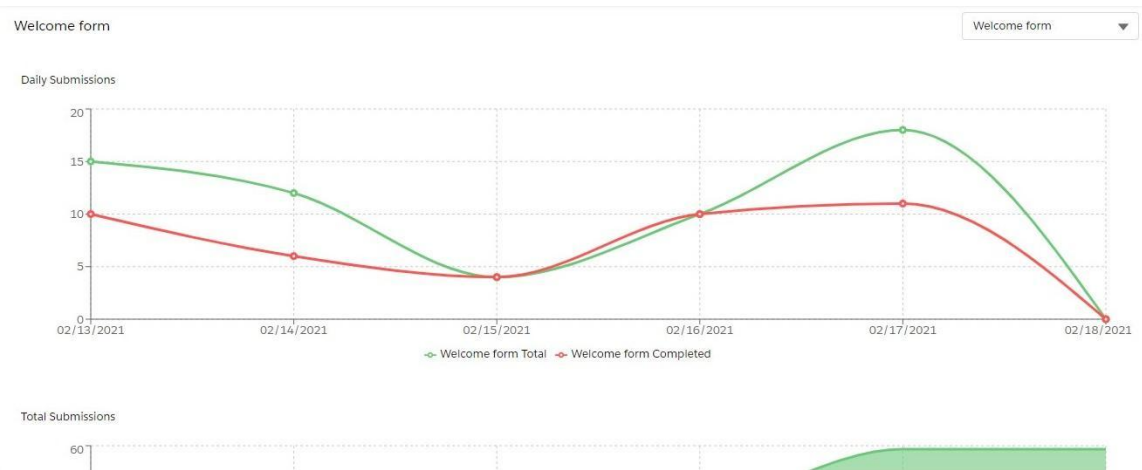
In the **Total Submissions** chart, you can see the accumulation of the total number of forms prompted and the number of forms completed.



In the **Total Submissions By Form** pie chart, you can see the number of each form completed.



4. Besides the Overview, you can also see the reports for each form. The report consists of two charts only, **Daily Submissions** and **Total Submissions**.



If you want to check the report of the other forms, click the dropdown on the top right and select the form you preferred. You will see the Daily Submissions and Total Submissions charts of the preferred form.

Cycle360 Charity Event ▼

Welcome form

Contact Us Form

✓ Cycle360 Charity Event