

3. Process Bot



The **Process Bot**, suitable for all types of companies, guides the customer in the first phase of contact with the company. This type of Chatbot can for example:

- Gather basic customer information
- Automate the lead generation process
- Assign the contact to the most suitable operator
- Book a meeting on the calendar

As with the FAQ Bot, the Process Bot is also fully customizable (color, type of buttons, logo on the chatbot, etc.) and can be implemented directly within web pages.

The leads created through this tool will be imported directly into the CRM used and can be automatically assigned to the sales representative through connected BPM processes.

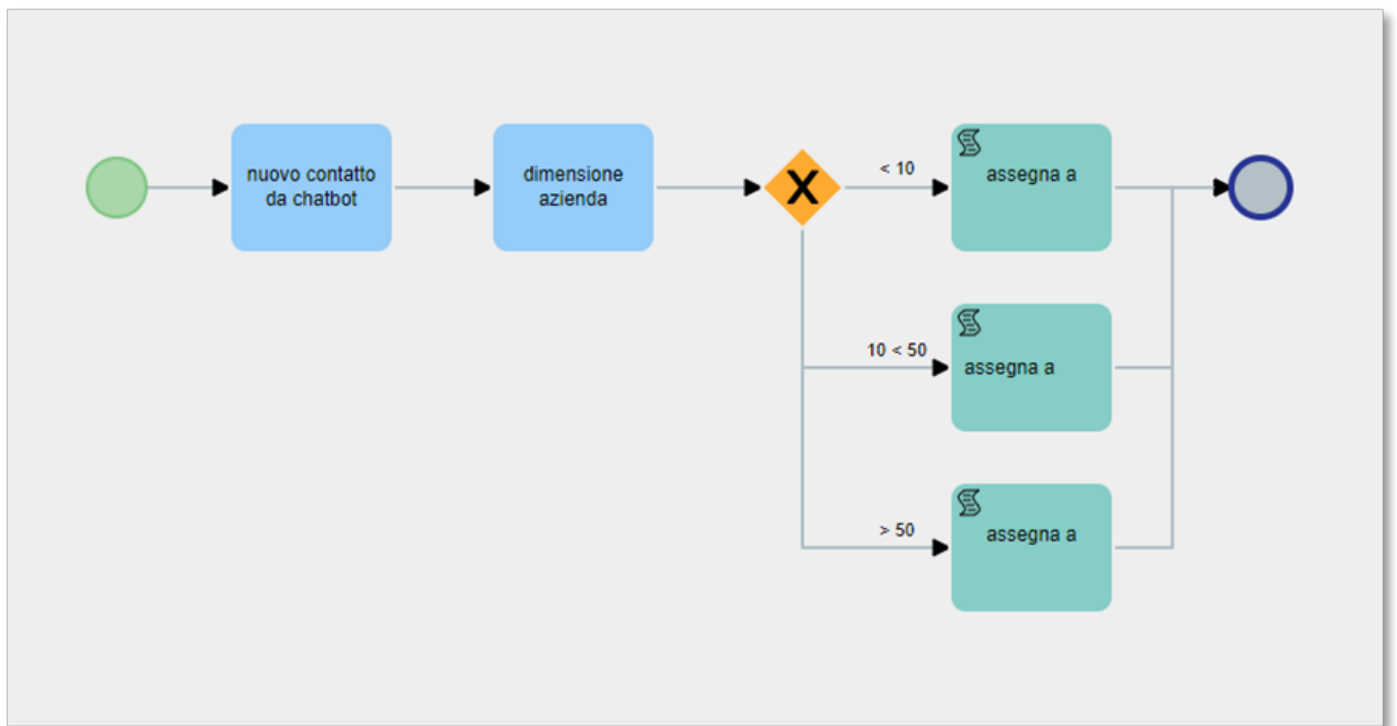
The screenshot shows a CRM interface with a sidebar on the left containing navigation icons. The main area displays the 'Informazioni Lead' (Lead Information) tab for a lead named 'klondike'. The data is organized into two columns. The right sidebar contains sections for 'SCORCIAIOIE' (Conversations, Note) and 'RELAZIONI' (Activities, Documents, Products, Campaigns, Services, Licenses, Target).


Informazioni Lead	
Nome	klondike
Cognome	klondike
Società	-
Titolo	-
Fonte Lead	-
Sito Klondike	-
Assegnato a	klondike_c2wVnG (Klondike)
Stato Lead	--Nessuno--
Business Unit	Klondike
Descrizione	Voglio essere contattato da un consulente; Email;
Partita IVA	-
Periodo Modificato	13-07-2022 13:52:40
Creato da	klondike_c2wVnG (Klondike)
Referral Code	-
PEC	-
Telefono	-
Cellulare	-
Account skype	-
Email	klondike@klondike.ai
Sito Web	www.klondike.ai
Fax	-
Riceve newsletter	si
Newsletter language	-
Periodo Creato	13-07-2022 12:45:02
Numero Lead	LEA114014
Webform Marketing	-
Motivo di contatto	-
Forza processo Lead	no


Example of master data created by the Chatbot (Process Bot)

We can add any additional information, useful to us, directly within the chatbot and in just a few clicks.

If, for example, for assignment to a salesperson it was essential for us to collect the size of the company as information (less than 10 employees, from 10 to 50 employees, more than 50 employees), we could insert this question into the flow which would trigger automatically a process of correct assignment of a commercial, as in the example below.




**Klondie**
powered by Klondike



Inserisci il tuo indirizzo email.

klondie@klondike.ai




Qual è la dimensione della tua azienda?

Meno di 10 dipendenti

Tra i 10 e i 50 dipendenti

Oltre i 50 dipendenti

Scrivi qui...



Obviously the previous slide is just an example. We can add any other type of request that is useful to us such as geographical area, business sector, company size or any other characteristic of the company.

Obviously, during the assignment phase, the BPM flows could also include multiple rules at the same time.

The Klondike Chatbot can also be integrated with tools such as the calendar to set up a meeting with a consultant.



By clicking on the calendar icon proposed by the Chatbot, it will be possible to select the date of your appointment

SELEZIONA UNA DATA

Europe/Rome

←

18-07-2022

/

24-07-2022

→

Lunedì 18 Luglio

>

Martedì 19 Luglio

>

Venerdì 22 Luglio

>

Screen for day choosing



CONFERMA IL TUO APPUNTAMENTO

Europe/Rome

CONFERMA IL TUO APPUNTAMENTO:

18-07-2022 10:00 - 11:00

La tua azienda (*)

Il tuo nome (*)

Il tuo cognome (*)

La tua email (*)

Il tuo telefono (*)

CANCELLA

CONFERMA

Data entry screen for the appointment

Cerca...

+ Crea

Richiesta HR

Fase2

Settimana 29 - Anno 2022

18 Lug 2022 - 23 Lug 2022

	Lun 18/7	Mar 19/7	Mer 20/7	Gio 21/7	Ven 22/7	Sab 23/7
08:00						
09:00	09:00 - 10:00 Team Meeting	09:00 - 09:30	09:00 - 09:30	09:00 - 09:30	09:00 - 09:30	
10:00		10:30 - 12:30 Book me slot	10:00 - 11:00 Book me slot	11:00 - 13:00 Book me slot	10:30 - 11:30 Revisione Piattaforma	
11:00						
12:00	12:00 - 13:00 Book me slot			12:00 - 12:30		
13:00						
14:00	14:30 - 16:30 Appuntamento con Klondie	14:30 - 15:30 Revisione Piattaforma	14:00 - 16:00 Book me slot		14:30 - 16:30 Book me slot	
15:00						
16:00		16:00 - 17:00 Book me slot		16:30 - 17:30 Book me slot		
17:00						

Assegnato a:

Selezionati

- Eventi Telematici
- exergyenergy
- External Unpaids
- Fabio Fedeli - Readytec
- Fabio Rossi
- Federico Billo Viola
- Federico Buffa
- Federico Fazzolari
- Federico Fistolera
- Federico Sandrini
- Filippo De

Here are the Book Me slots available in the vtenext calendar

The screenshot shows a CRM application interface. A modal window titled 'Evento Appuntamento con Klondike' is open, displaying event details. The modal has a close button (red X) in the top left corner. At the top right of the modal are buttons: 'Dettagli', 'Modifica', 'Chiudi Attività', and 'Elimina'. Below these are tabs: 'Collegato a', 'Invita', 'Avvisa', and 'Ripeti'. The 'Collegato a' tab is active, showing 'Collegato a Klondike Klondike' and a section for 'Nome Contatto'. The main area of the modal contains a table with event details:

Tipo Attività		Visibilità
Chiamata		Standard
Soggetto		
Appuntamento con Klondike		
Data di inizio	Data di chiusura	
18-07-2022 14:30	18-07-2022 16:30	
Luogo		
Stato		
Pianificato		
Assegnato a		
davide.potenza (Davide Potenza)		
Priorità	Orario creazione	
Alto	14-07-2022 13:01:18	
Orario modifica	Organizzatore	
14-07-2022 13:02:13	davide.potenza (Davide Potenza)	

The background shows a calendar view for the week of July 29th to August 4th, 2022. A sidebar on the right lists various contacts and companies, including 'Selezionati', 'nti Telematici', 'gyenergy', 'ernal Unpaid', 'io Fedeli - Readytec', 'io Rossi', 'erico Billo Viola', 'erico Buffa', 'erico Fazzolari', 'erico Fistolera', and 'erico Sandrini'.

And finally here is the event chosen directly by Chatbot

Revision #1

Created 31 March 2023 08:10:56

Updated 31 March 2023 09:00:33