

# 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 for a lead named 'klondike'. The main area is divided into two columns of fields. The left column contains personal and contact information, while the right column contains metadata and system-related data. A sidebar on the right offers navigation options for conversations, notes, and various relationship types.

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

**SCORCIATOIE**

- Conversazioni
- Note

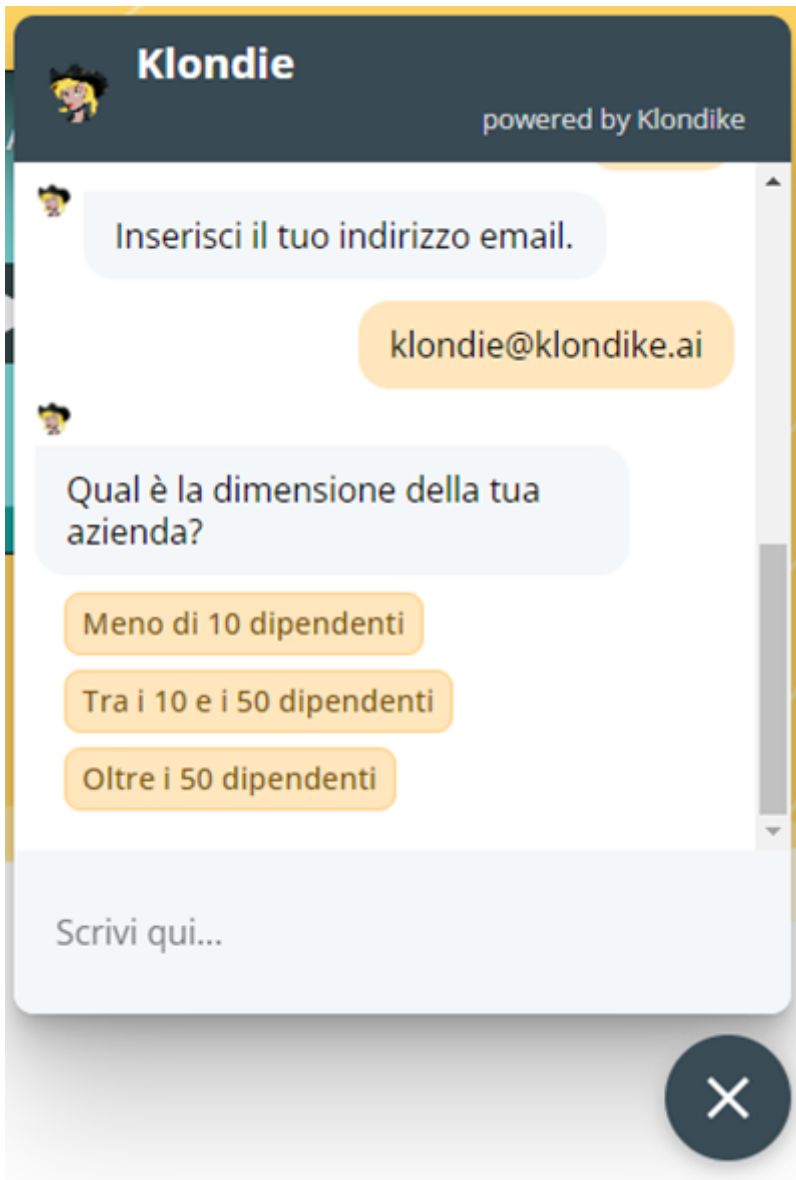
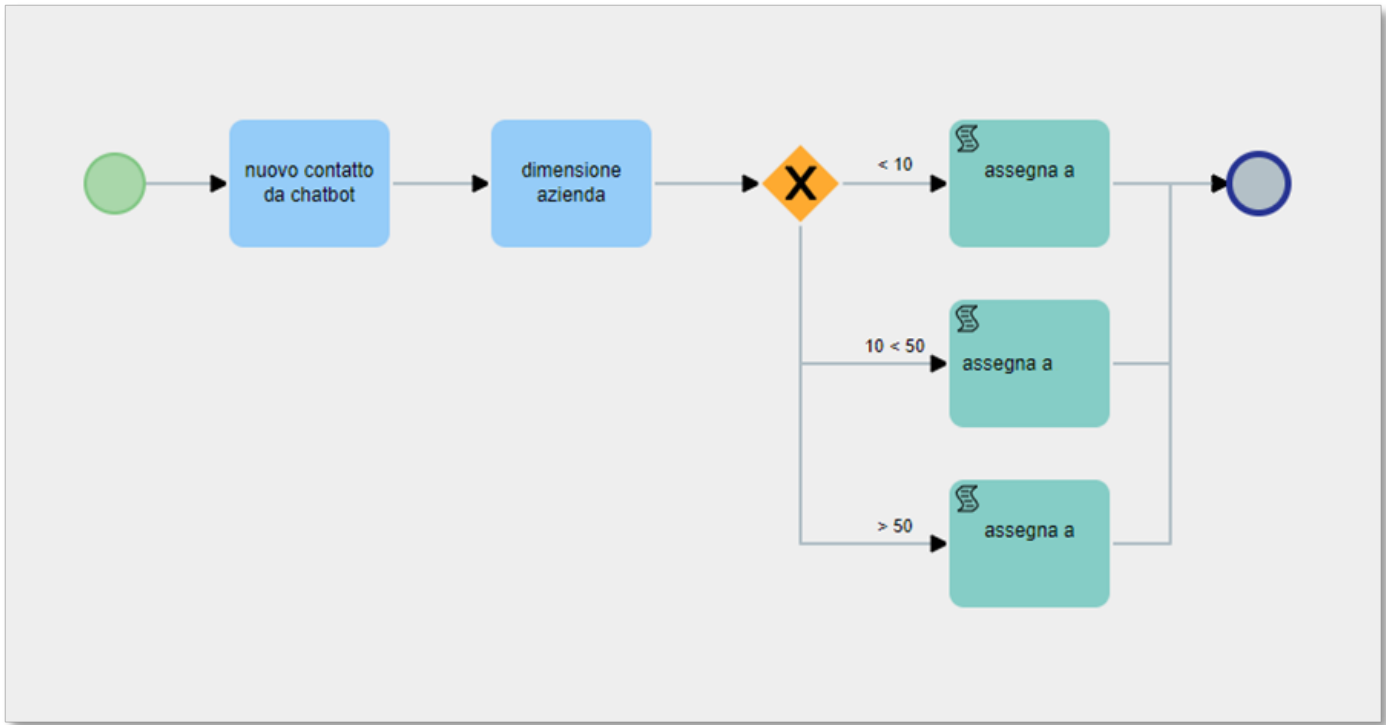
**RELAZIONI**

- Attività
- Documenti
- Prodotti
- Campagne
- Servizi
- Licenze
- Target

*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.

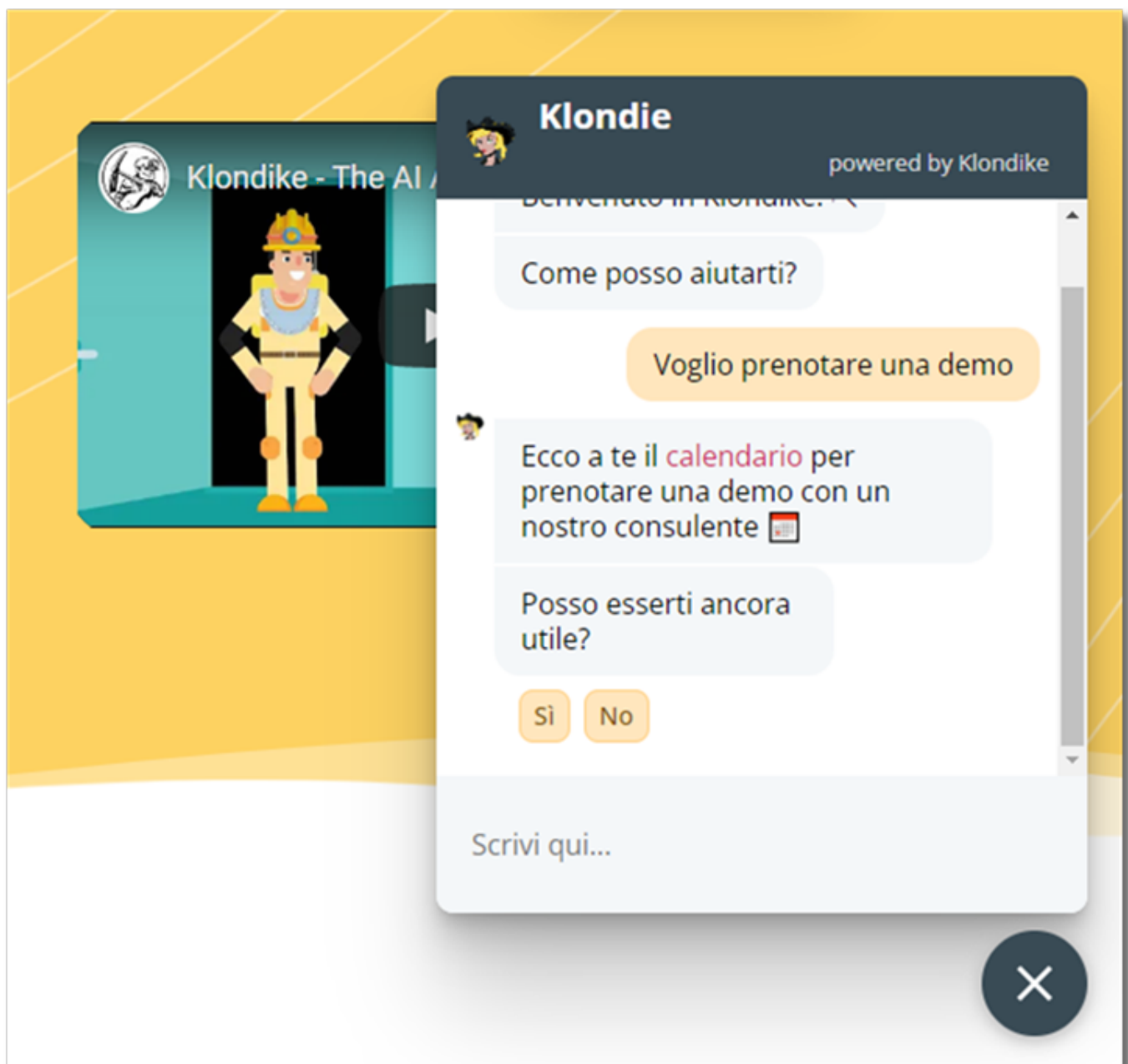
If, for example, for assignment to a salesperson it was essential for us to collect the size of the company as information (less than 10 employees, from 10 to 50 employees, more than 50 employees), we could insert this question into the flow which would trigger automatically a process of correct assignment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



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 Book me slot	09:00 - 09:30 Book me slot	09:00 - 09:30 Book me slot	09:00 - 09:30 Book me slot	
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 - 12:00		
13:00						
14:00			14:00 - 16:00 Book me slot			
15:00	14:30 - 16:30 Appuntamento con Klondie	14:30 - 15:30 Revisione Piattaforma			14:30 - 16:30 Book me slot	
16:00		16:00 - 17:00 Book me slot				
17:00				16:30 - 17:30 Book me slot		

Assegnato a: Selezionati

- Eventi Telematici
- exergyenergy
- External Unpaid
- 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 calendar application interface. A modal window is open, displaying details for an event titled "Evento Appuntamento con Klondie". The modal has a close button (red X) in the top left corner and action buttons (Dettagli, Modifica, Chiudi Attività, Elimina) in the top right. Below the buttons are icons for "Collegato a", "Invita", "Avvisa", and "Ripeti". The main content area shows the event's details, including its type, visibility, subject, start and end times, location, status, assignee, priority, creation time, modification time, and organizer.

Evento Appuntamento con Klondie	
Tipo Attività	Chiamata
Visibilità	Standard
Soggetto	
Appuntamento con Klondie	
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)

*And finally here is the event chosen directly by Chatbot*

Revision #1

Created 2023-03-31 08:10:56 UTC

Updated 2023-03-31 09:00:33 UTC