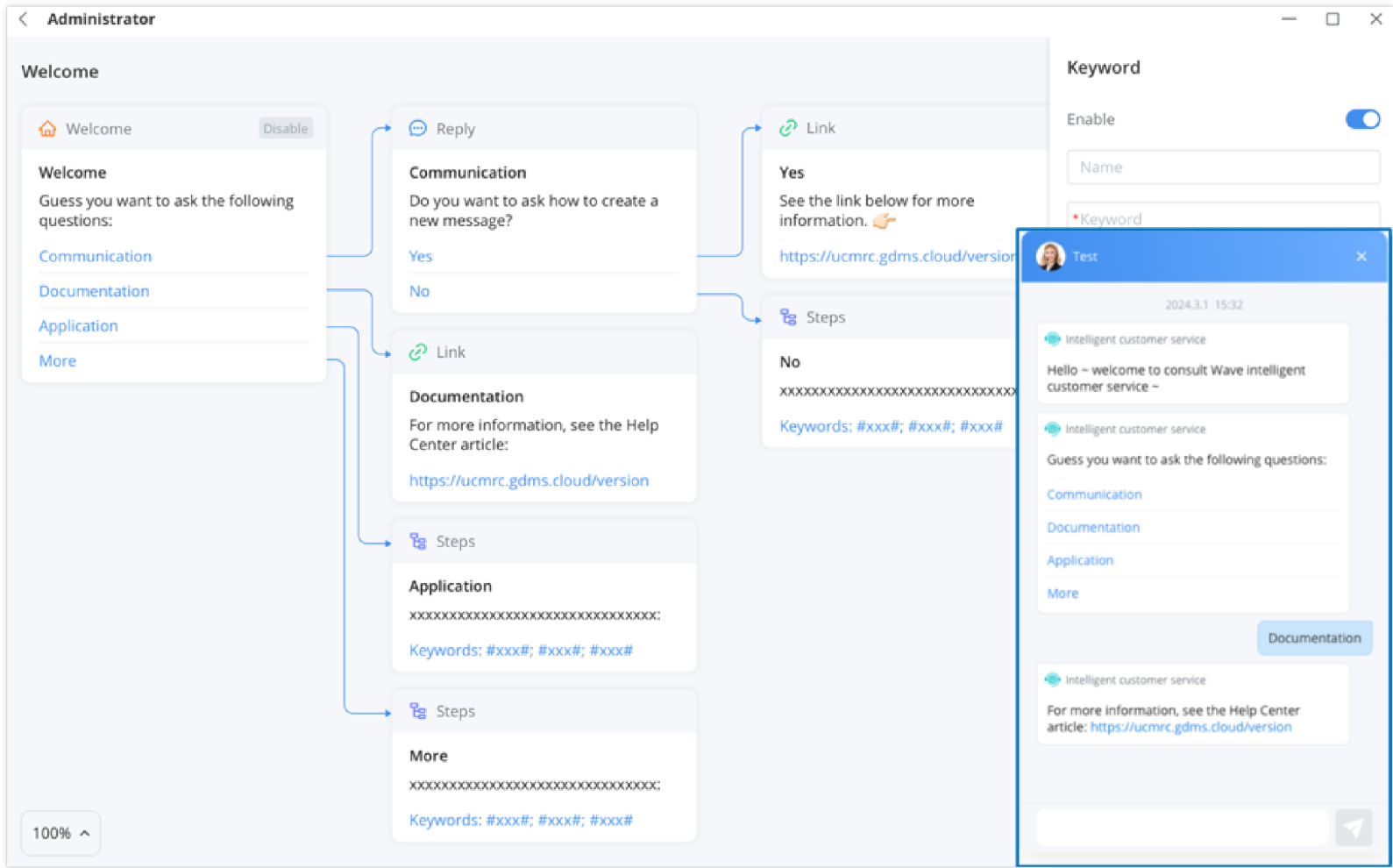


Live Chat Chatbot Admin Guide

OVERVIEW

The Chatbot intelligently interacts with visitors by automatically responding with pre-configured messages, enhancing agent efficiency and improving the overall customer experience.

For example, when a visitor initiates a chat session, they enter the default reply flow and receive a greeting such as “Hi, how may I help you?” or a customized message with interactive buttons set by the administrator. When the visitor clicks a button, the Chatbot automatically replies with the corresponding preset response. Administrators can also create separate sub-flows or button options tailored to address specific inquiries, such as product information or pricing details.



Chatbot Flow Configuration

PREREQUISITES

1. The UCMRC/CloudUCM plan of your device has LiveChat permission.
2. Install Wave Desktop client and log into your extension.
3. The current extension user has Wave administrator privileges. on the UCM management web UI, set an extension user as “Wave Administrator”, as shown below.

Extensions > Edit Extension: 1000

<

Basic Settings

Media

Features

Voicemail

Custom Time

Wave Client

Follow Me

Advanced Se >

General

* Extension

1000

CallerID Number

* Call Privileges

Local

* SIP/IAX Password

AuthID

* Concurrent Registrations

3

Disable This Extension

☐

User Settings

First Name

Arthur

Last Name

Morgan

Email Address

morgan.arthur@email.com

* User/Wave Password

* User Portal/Wave Privileges

Wave Administrator

Mobile Number

+1

Department

Enterprise Root Directory

Job Title

Add / Edit Privileges

Cancel

Save

Extension Basic Settings

4. It requires creating a Live Chat, please access the UCM6300 Series device web UI then navigate to **Messaging** → **Live Chat** then add a Live Chat if it has not been added.

UCM6304

Wave UCMRC Services

admin

System Status

Extensions/Trunk

Basic Call Features

Advanced Call Fea...

Messaging

IM Settings

Live Chat

Live Chat Customer Service

Add

Name	Status	Live Chat Link Address	Destination	Options
2104-call	Enable	https://dliuucm.a.gdms.work/liveCha...	Queues - 6505 "wjtest12345"	
23234234	Enable	https://dliuucm.a.gdms.work/liveCha...	Extension - 1500 "zh-1500 han"	
Intelligent Customer Servi...	Enable	https://dliuucm.a.gdms.work/liveCha...	Queues - 6501 "wangshuai-queue"	
Public Reception Center	Enable	https://dliuucm.a.gdms.work/liveCha...	Queues - 6509 "call_queue_test"	
Test Chatbot	Enable	https://dliuucm.a.gdms.work/liveCha...	Extension - 1001 "Sunny"	

UCM Live Chat

Note

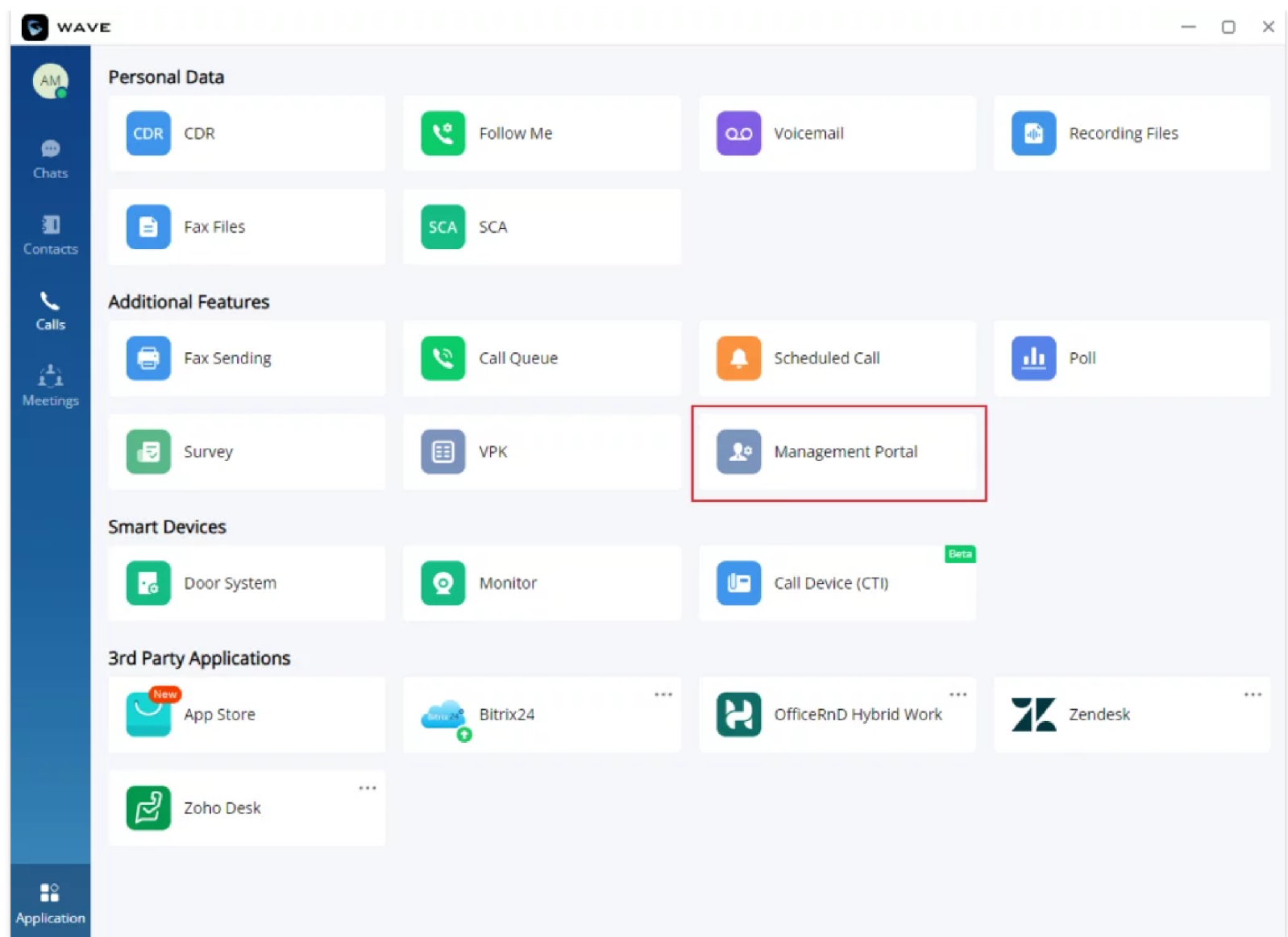
For more information regarding Live Chat configuration, please refer to the following link: <https://documentation.grandstream.com/knowledge-base/live-chat-user-guide/>

CHATBOT CONFIGURATION

The management platform includes a Chatbot function that allows users to configure an automatic reply flow for customer interactions. A single Chatbot can be assigned to multiple channels (e.g., a specific Live Chat or WhatsApp), enabling multiple channels to share the same automated reply flow.

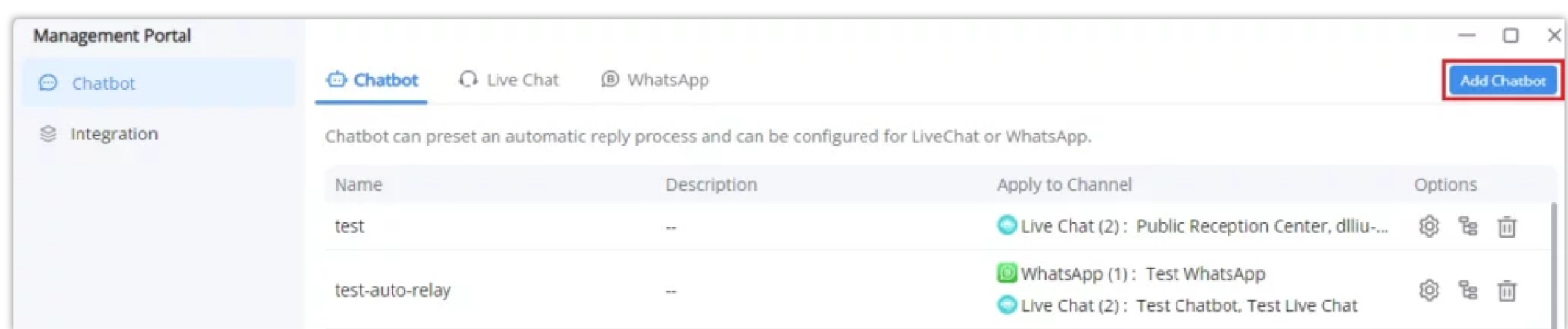
Add a Chatbot

1. Log into Wave Desktop client, then navigate to **Application** tab and click on “Management Portal”



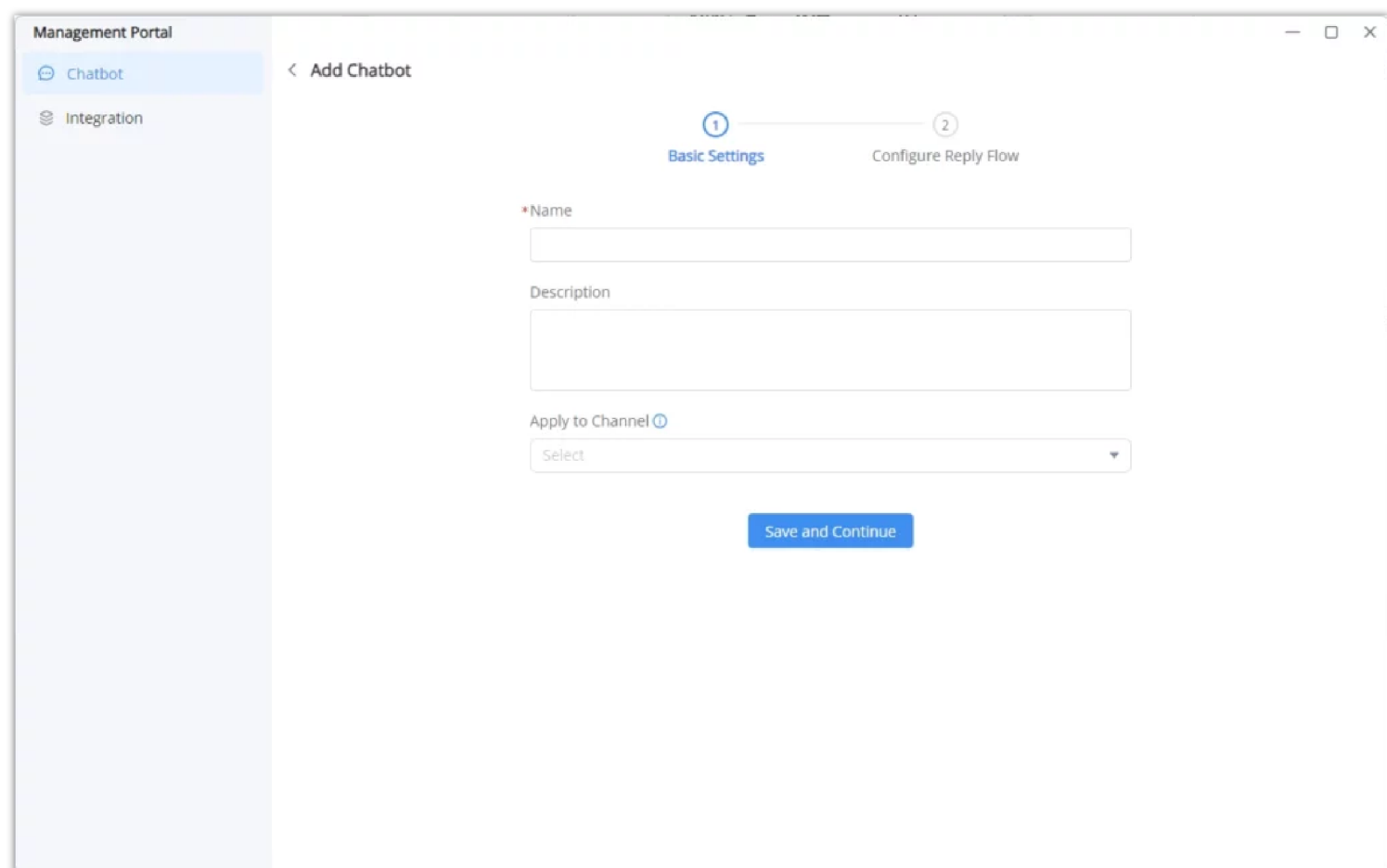
Wave Application Tab

2. On the **Chatbot** tab, click on “Add Chatbot”.



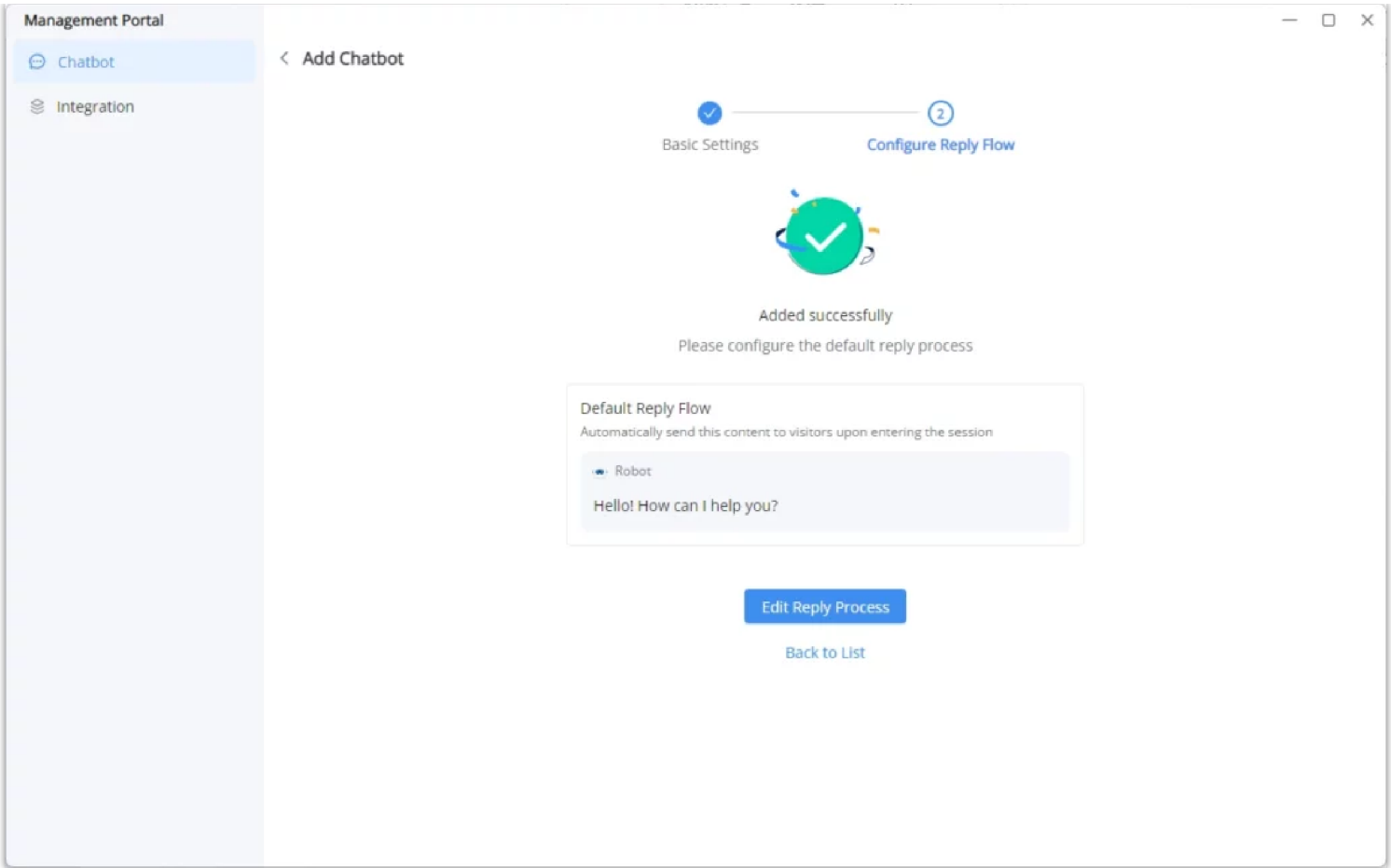
Add Chatbot

3. Provide the Chatbot **name**, **description**, and select the **channel** (Live Chat or WhatsApp) created on the UCM.



Chatbot Basic Settings

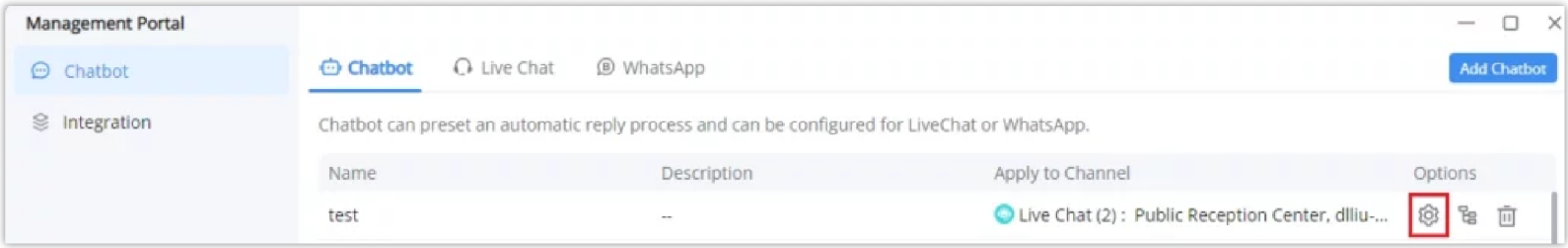
4. Configure the Chatbot reply flow as described in the **Manage Chatbot Reply Flow** section of this guide.



Configure Chatbot Reply Flow

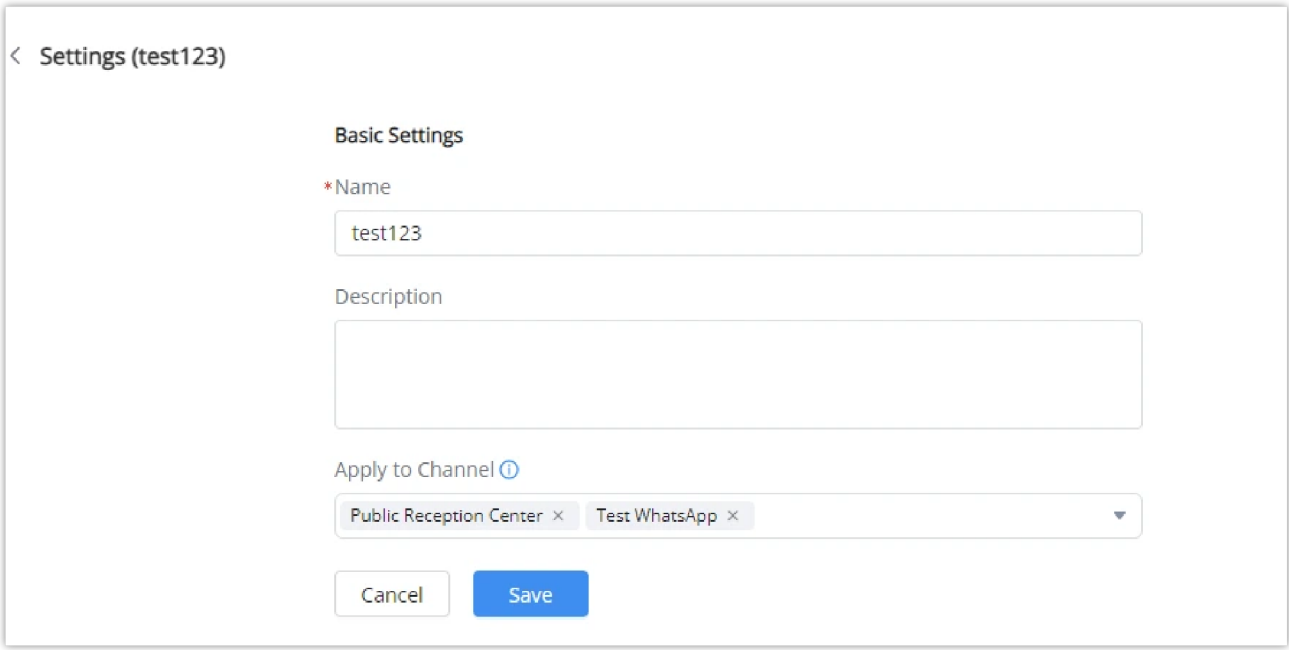
Edit a Chatbot

1. Locate the chatbot you want to update from the list on the Chatbot tab.
2. Click the edit icon  next to that chatbot's name. This will open the chatbot's configuration page.



Edit Chatbot

3. Update the settings as required:
 - **Name:** Change the assigned name of the chatbot.
 - **Description:** Modify the description to clarify the chatbot's purpose or provide updated details.
 - **Apply to Channel:** Select the channels where this chatbot will be active (e.g., Live Chat channel or WhatsApp channel).



Basic Settings

4. Click **Save** to apply your changes.

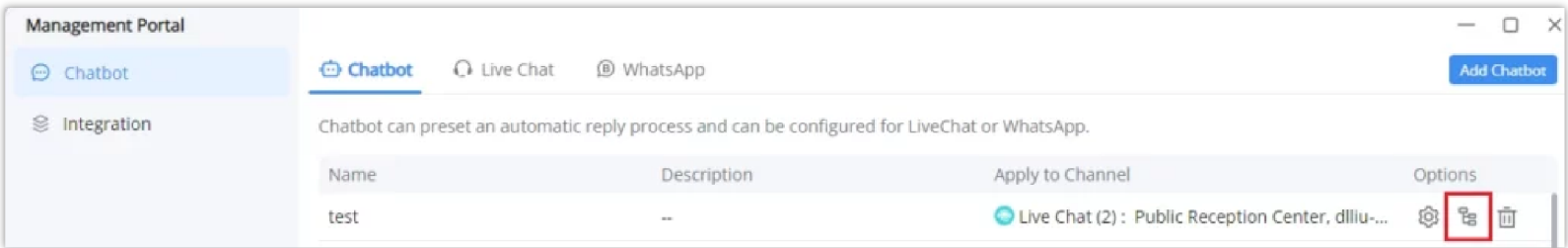
Manage Chatbot Reply Flow

The chatbot reply flow defines how the Chatbot interacts with visitors by guiding conversations and automating responses. It consists of a main default flow that initiates the interaction and additional sub-flows for handling specific topics or scenarios.

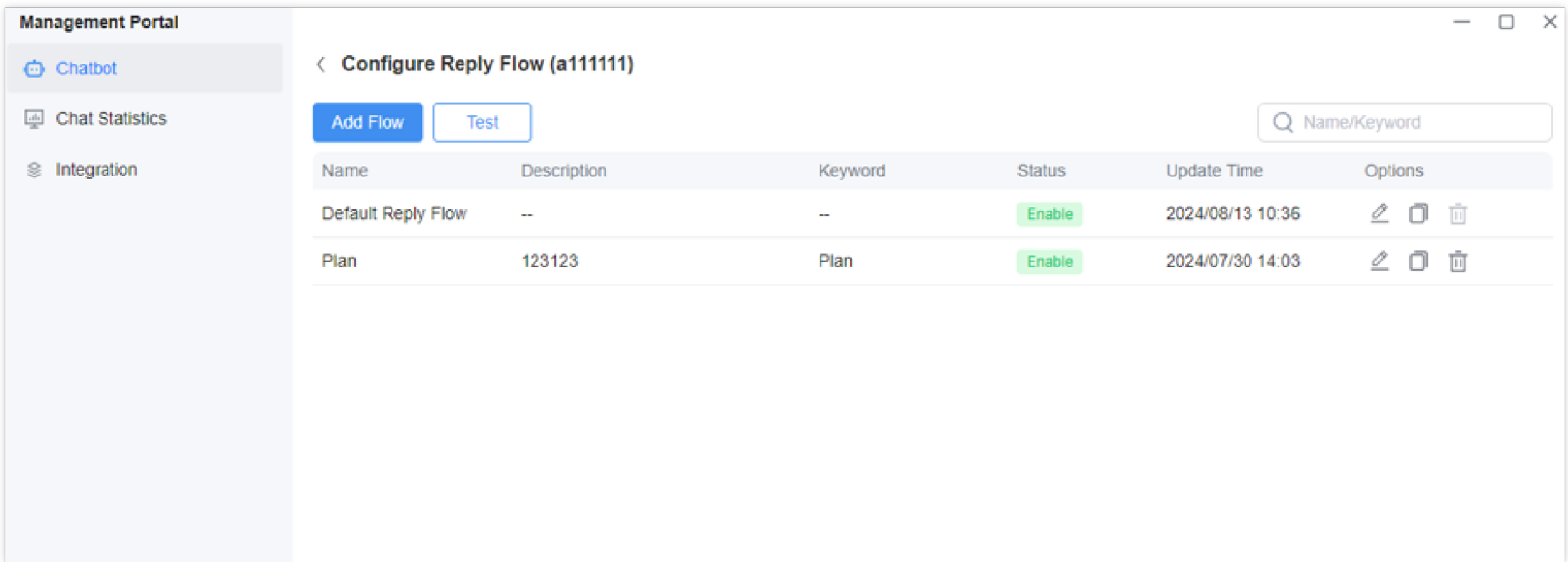
The chatbot reply flow consists of two main components:

- **Default Reply Flow:** After enabling Chatbot, there will always be a default reply flow that cannot be deleted or hidden. This is the beginning of the chat bot conversation. It is mainly used to greet visitors, collect information from visitors, and display questions that visitors may need to ask, so that visitors can solve problems according to guidance.
- **Sub-flow:** Sub-flows set for specific situations or complex problems, such as product prices, etc. It can be referenced in different scenarios of the default response flow or reused in other Live Chats.

Users can edit the Chatbot reply flow by clicking the  to access the reply flow list.



Edit Chatbot Reply Flow

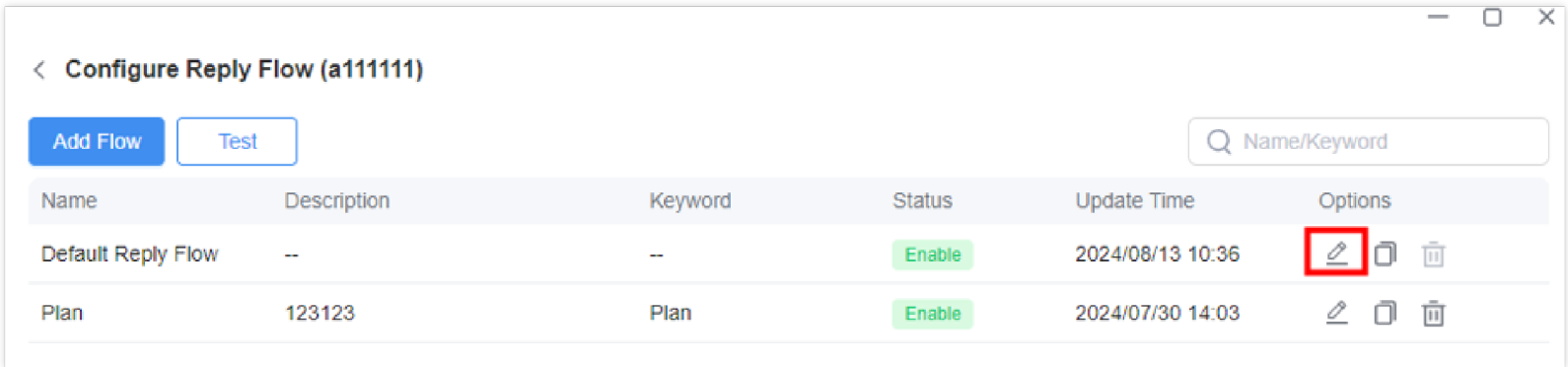


Reply Flow Configuration List

Configure Default Reply Flow

If you want to automatically reply to visitors’ messages, you must configure a default reply flow.

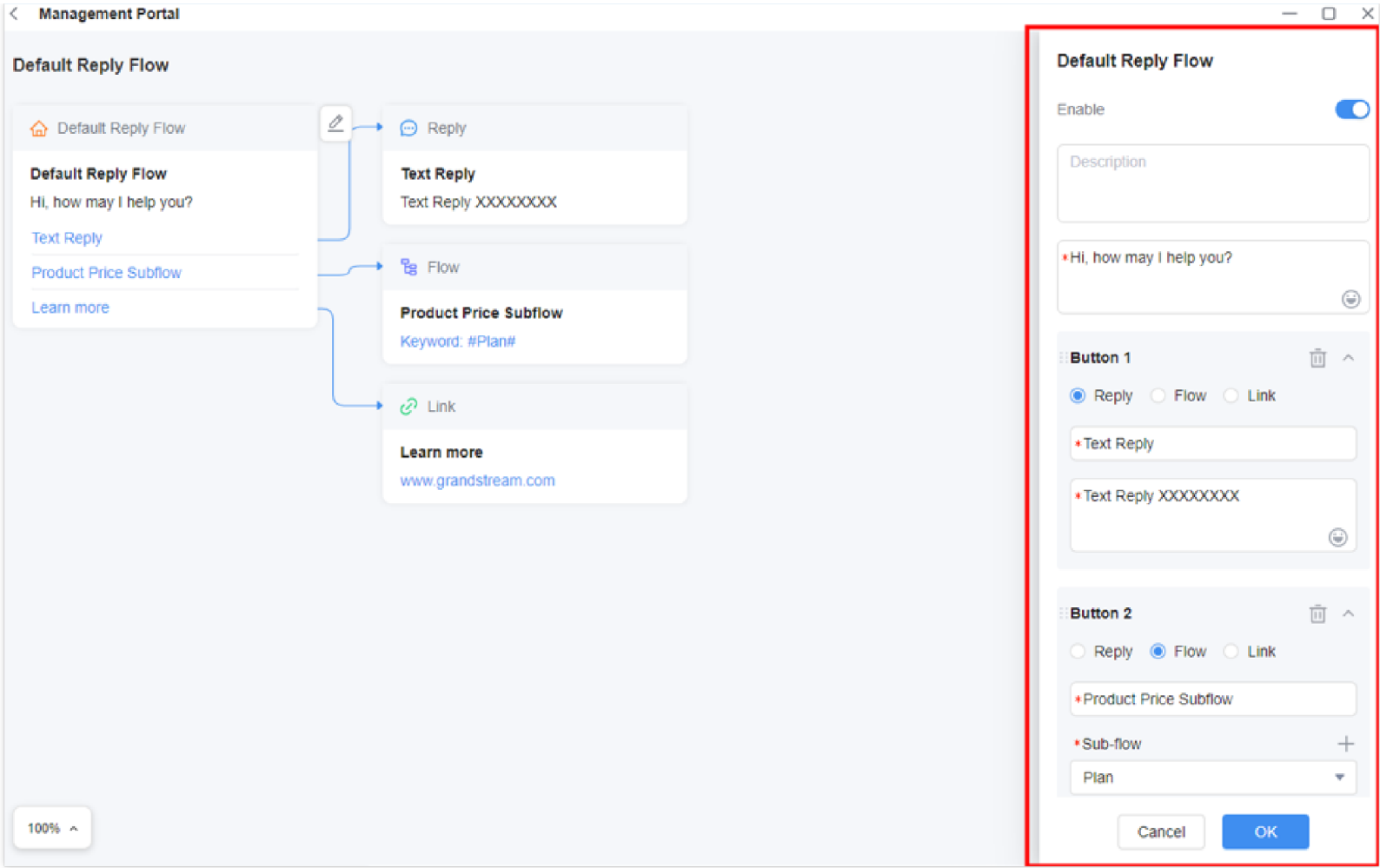
1. Open the Chatbot management in **Application** → **Management Portal**.
2. Select the Chatbot you need to configure, click  .
3. Click the edit button of “**Default Reply Flow**” to enter the flow editor page.



Edit Reply Flow

Flow Editor

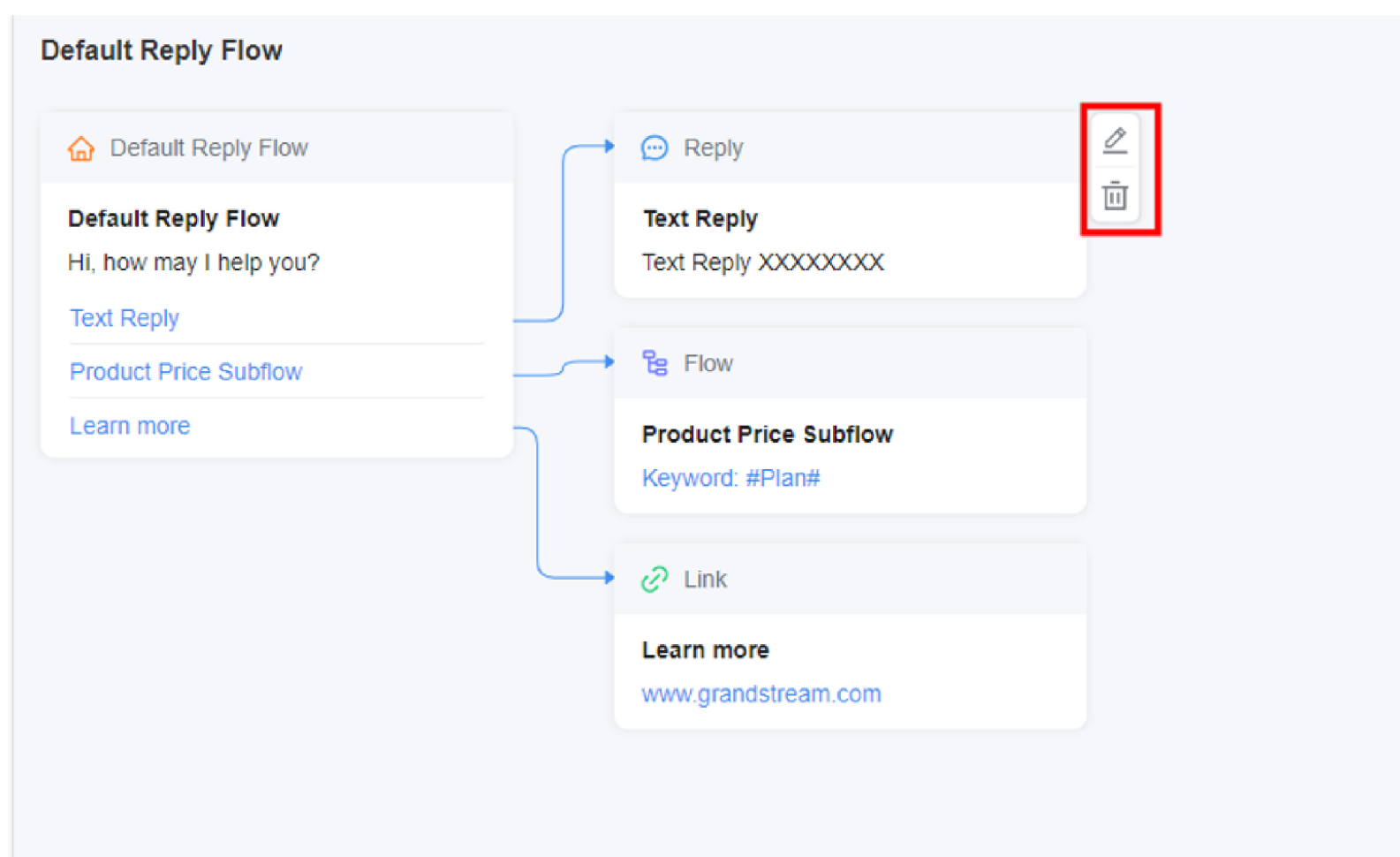
Edit the main message: Click the message box to edit the content and buttons in the message.



Edit Default Reply Flow

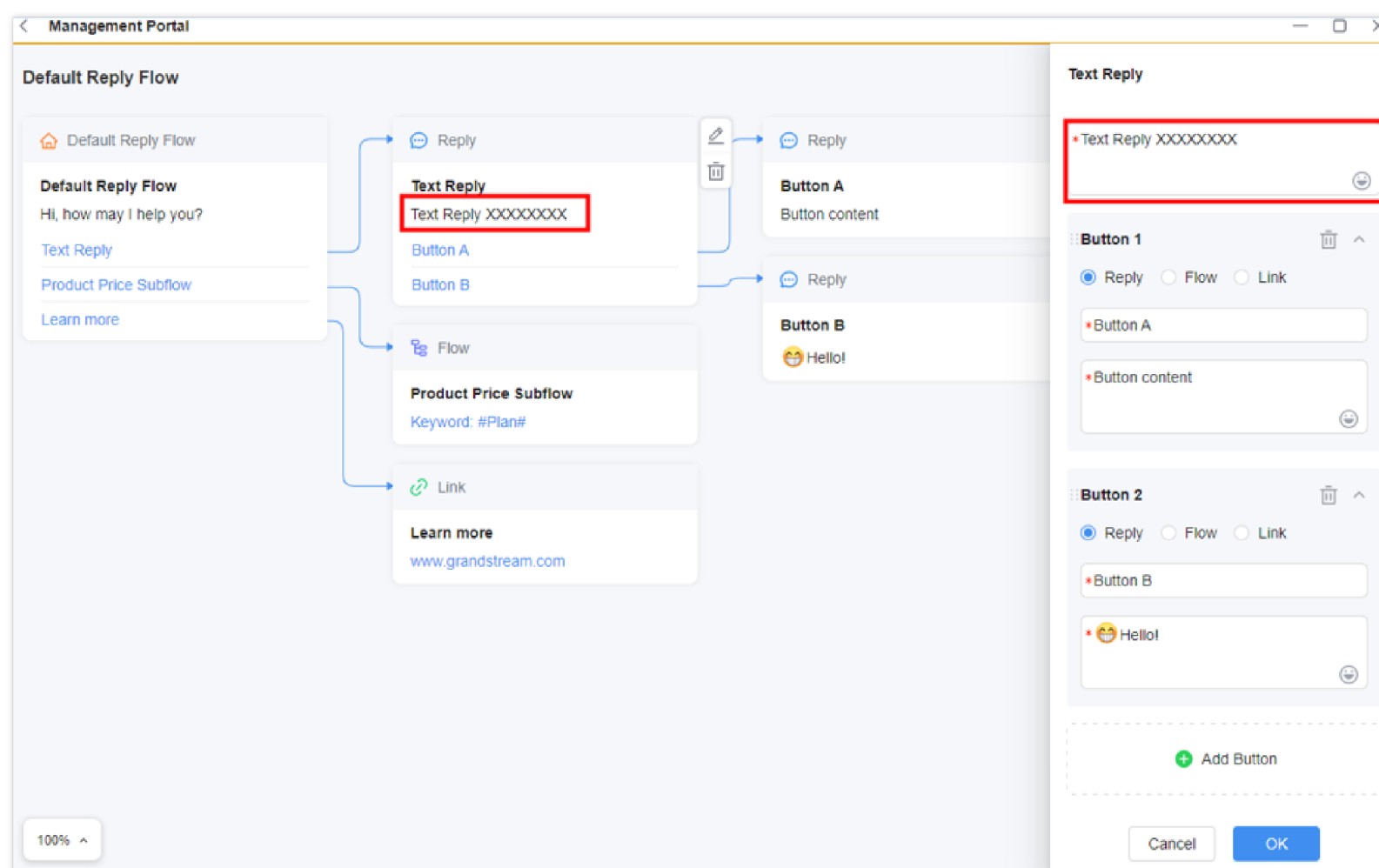
Enable	Whether to enable this flow. If not enabled, users cannot enter this flow and cannot automatically reply to messages in this flow.
Description	The description of this flow. This content will not be seen by visitors.
Message Content	Enter the message content for automatic reply to visitors.
Add Button- “Reply” Type	When a visitors clicks this button, the system will reply to this text message. ● Button Name: Enter the button name to be displayed. ● Reply Contents: Enter the message content of the reply.
Add Button- “Flow” Type	Visitors click this button to enter the selected sub-flow. ● Button Name: Enter the button name to be displayed. ● Sub-flow: Select an existing sub-flow. You can also click “+” button to create a new sub-flow, enter the keyword of the sub-flow, and then click the sub-flow to edit it.
Add Button- “Link” Type	Visitors click this button and use the browser to open this URL.
Note: Click “Delete” icon to delete the button and its reply content.	

Edit/delete message: Hover over the message box to edit and delete



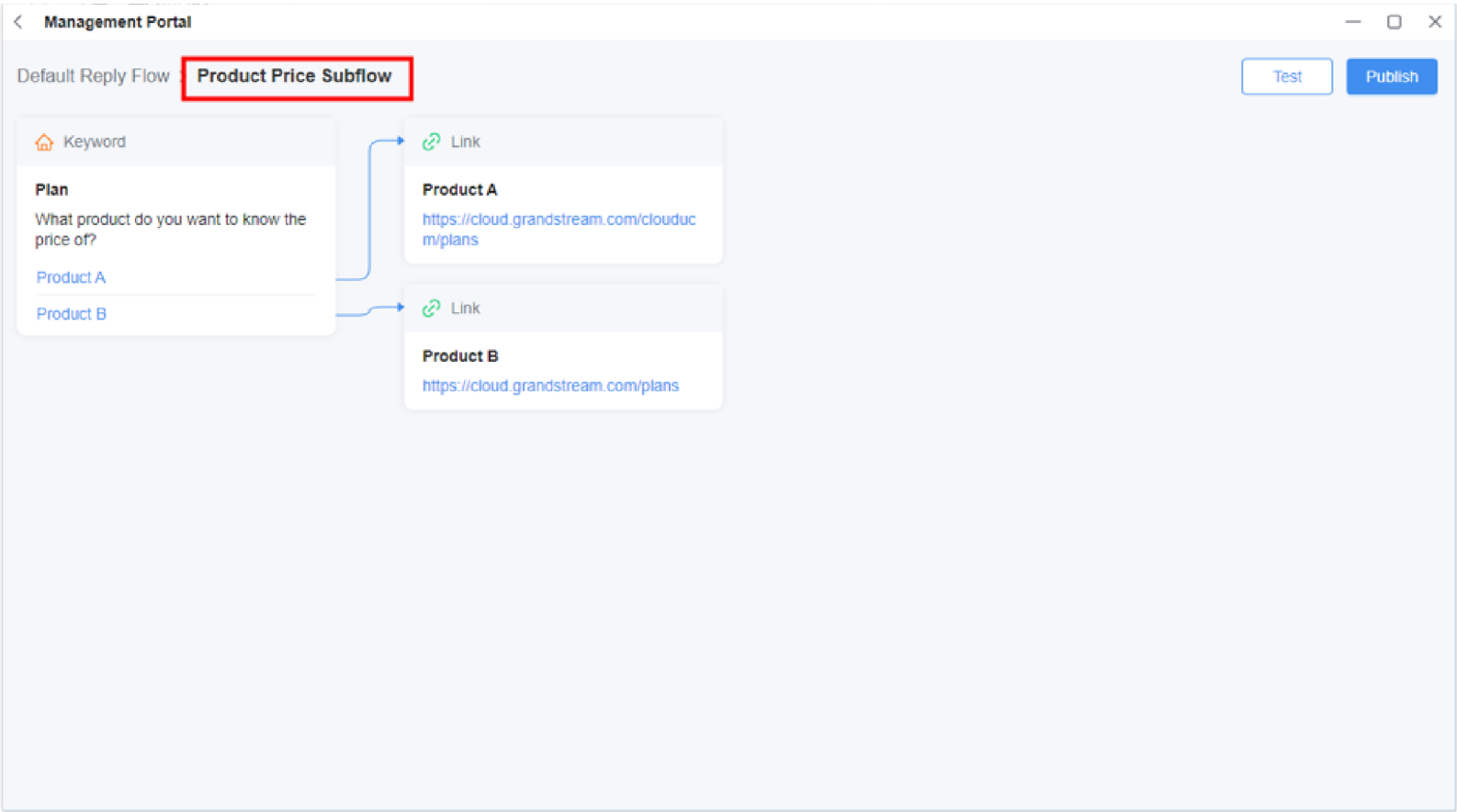
Default Reply Flow

Click the message or the icon  to edit the message content and corresponding buttons.



Default Reply Flow Configuration

If it is a "Flow" type, click Edit to directly enter the sub-process editor.



Reply Flow Instance

Publish the flow: After editing, you need to click the “Publish” button in the upper right corner to save and take effect this flow.

Add Sub-flow

You can create multiple sub-flows so that you can reference this sub-flow in different scenarios in the default flow, or visitors can send keywords to enter this sub-flow.

- 1. Open the Chatbot management page in **Application** → **Management Portal**.
- 2. Select the Chatbot you need to configure, click 
- 3. Click “Add Flow” to enter the following sub-flow editor page:

The screenshot shows the 'Management Portal' window with the 'Keyword' sub-flow editor. The main area is titled 'Untitled' and contains a 'Keyword' block with a plus sign. The right sidebar shows the 'Keyword' configuration panel with the following fields: 'Enable' (toggle), 'Name' (text input), 'Keyword' (text input with a red asterisk), 'Description' (text input), 'Reply Contents' (text input with a red asterisk and a speech bubble icon), and 'Add Button' (button with a green plus icon). At the bottom right, there are 'Cancel' and 'OK' buttons.

Keyword

Enable	Whether to enable this flow. If not enabled, users cannot enter this flow and cannot automatically reply to messages in this flow.
Name	The name of this flow, which will not be visible to visitors.

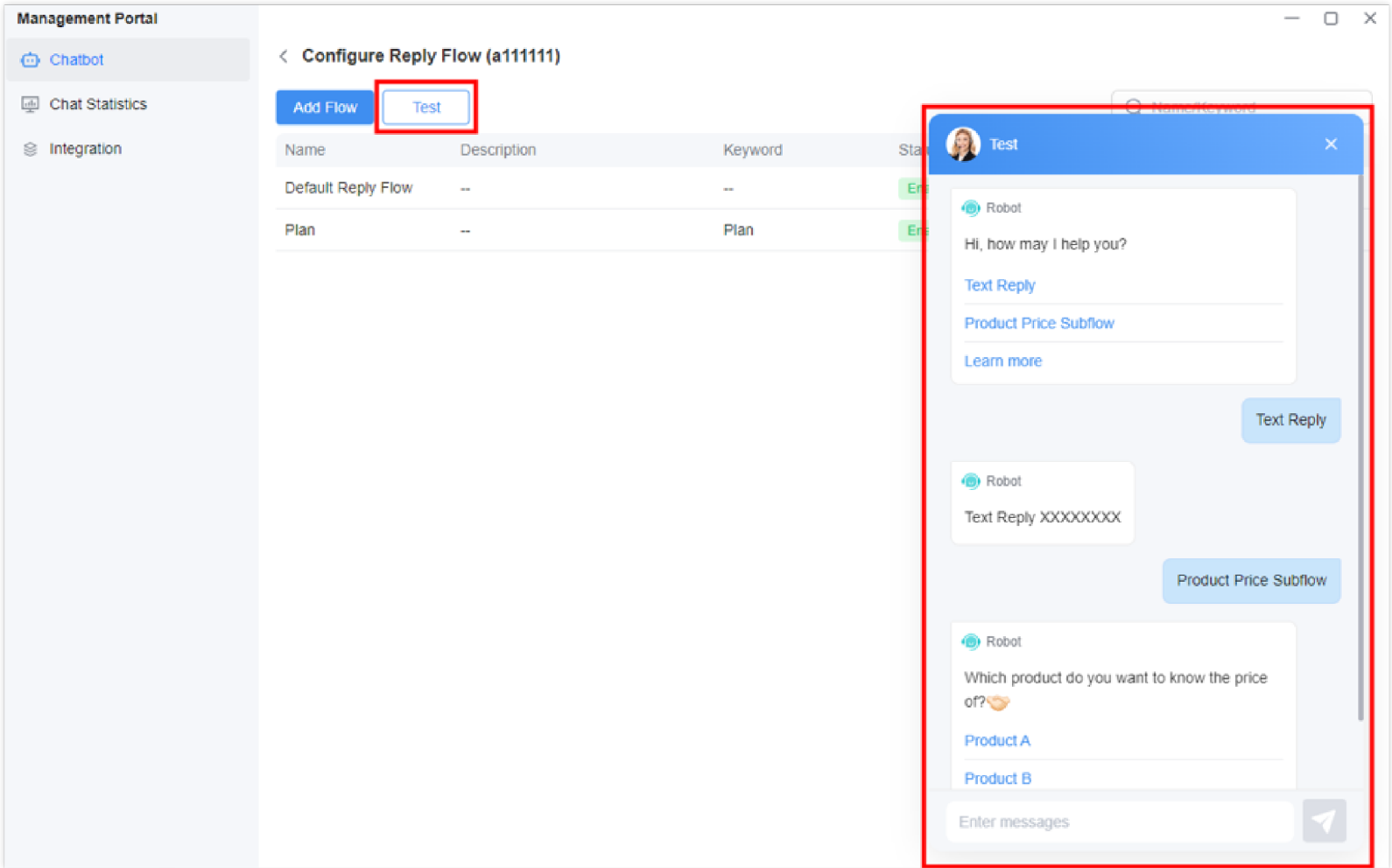
Keyword	The keyword of this sub-flow. Other flows use this keyword to enter this sub-flow. It is unique in all flows of this LiveChat and cannot be repeated.
Description	The description of this flow. This content will not be seen by visitors.
Reply Content	Enter the message content that will be displayed on the visitor interface after entering this flow.
Add Button- “Reply” Type	When a visitors clicks this button, the system will reply to this text message. ● Button Name: Enter the button name to be displayed. ● Reply Contents: Enter the message content of the reply.
Add Button- “Flow” Type	Visitors click this button to enter the selected sub-flow. ● Button Name: Enter the button name to be displayed. ● Sub-flow: Select an existing sub-flow. You can also click “+” button to create a new sub-flow, enter the keyword of the sub-flow, and then click the sub-flow to edit it.
Add Button- “Link” Type	Visitors click this button and use the browser to open this URL. ● Button Name: Enter the button name to be displayed. ● URL: Enter the corresponding URL address.

4. After editing, you need to click the “Publish” button in the upper right corner to save and take effect this flow.

Test and Publish Your Chatbot

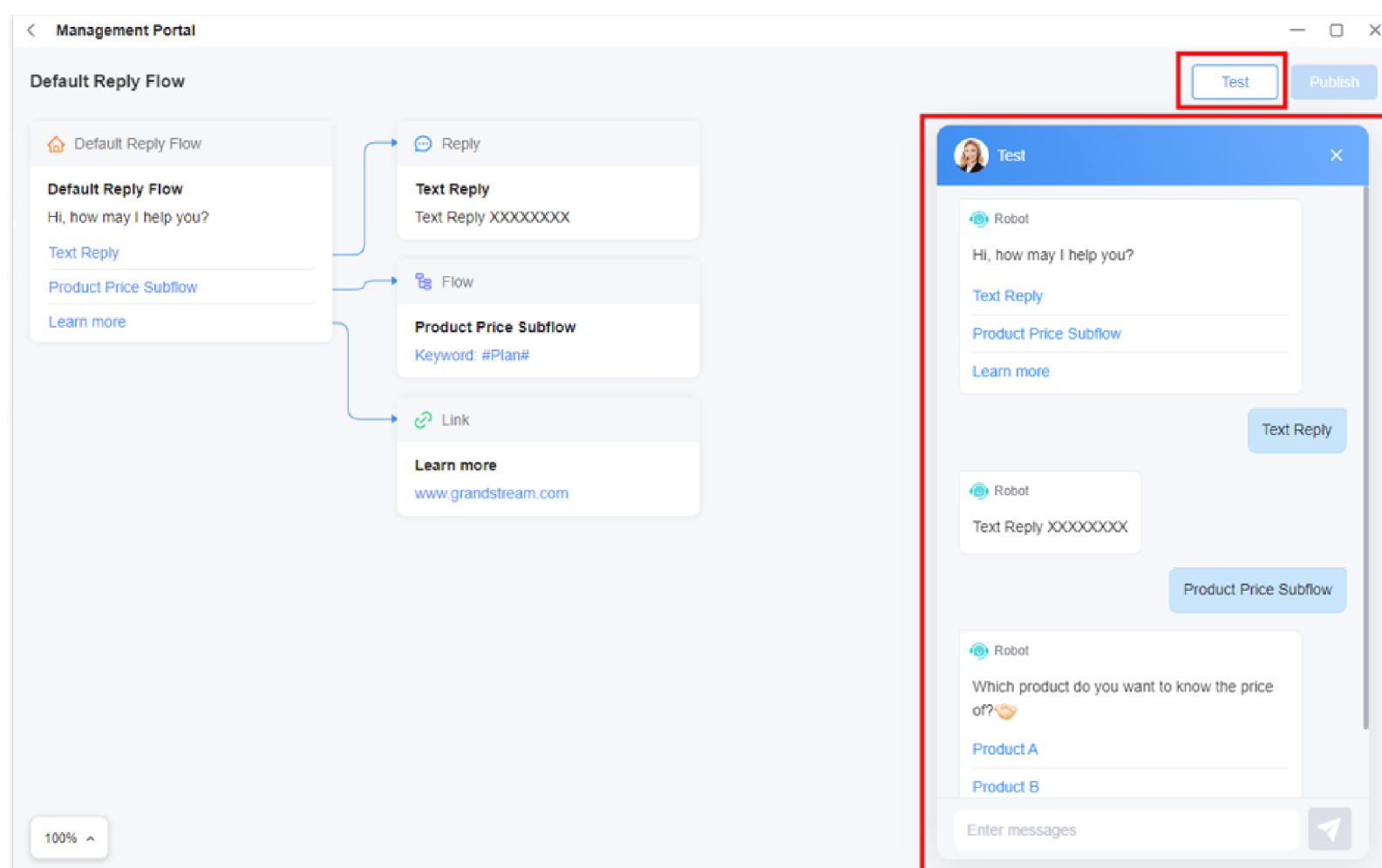
You can test the auto-reply flow of the Chatbot you set up and publish it.

1. Open the Chatbot management page in **Application** → **Management Portal**.
2. Select the Chatbot you need to configure, click 
3. Click the “Test” button to enter the test page. Click the message button on the test page to try out the flow to ensure that it meets your expectations:



Chatbot Test

4. You can also go to the flow editor page and click the “Test” button to test the chatbot:

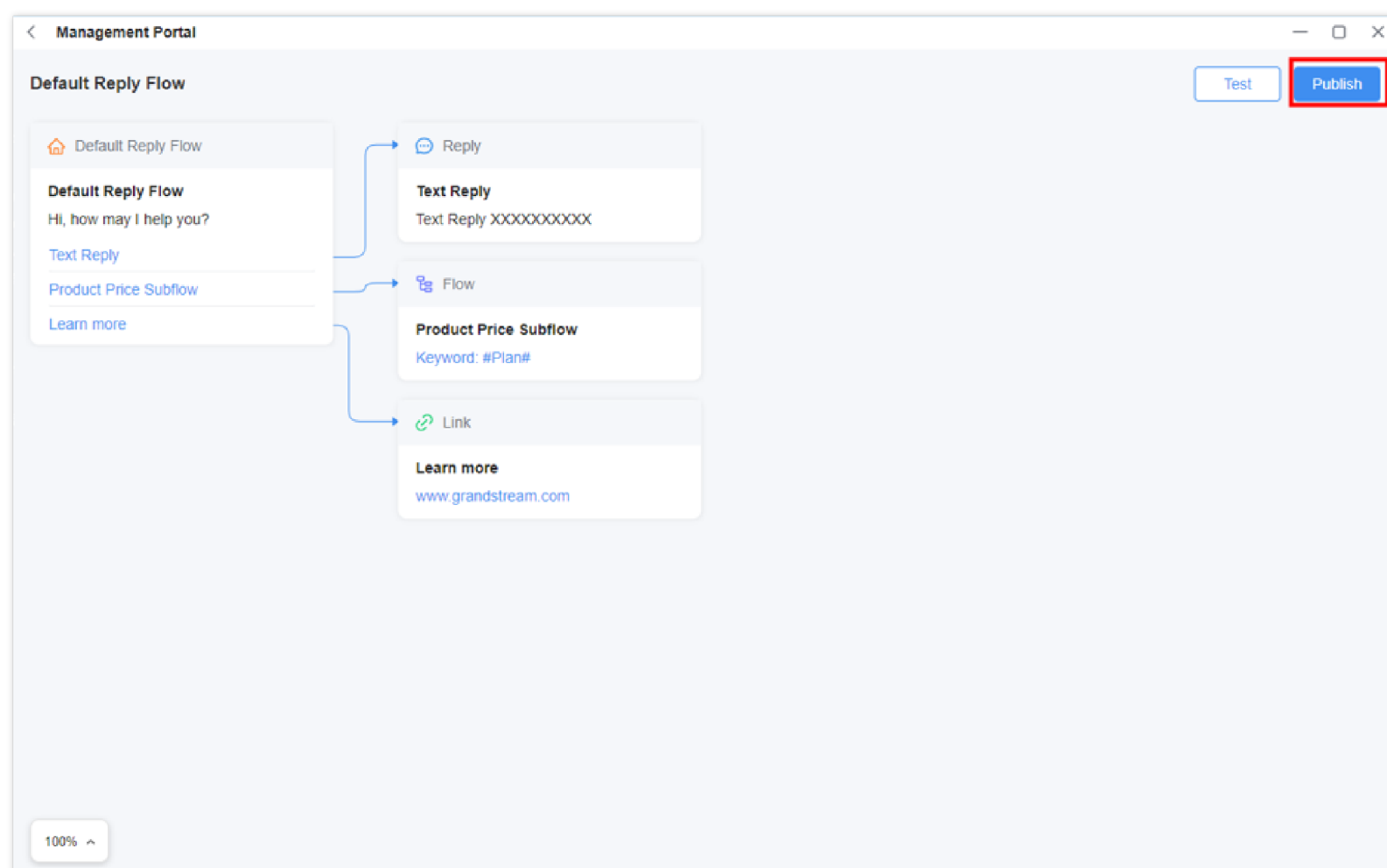


Reply Flow Test

Note

If you are in a sub-flow, you can only the test the reply content of this sub-flow.

5. After editing, you need to click the “Publish” button in the upper right corner to save and make this flow effective.

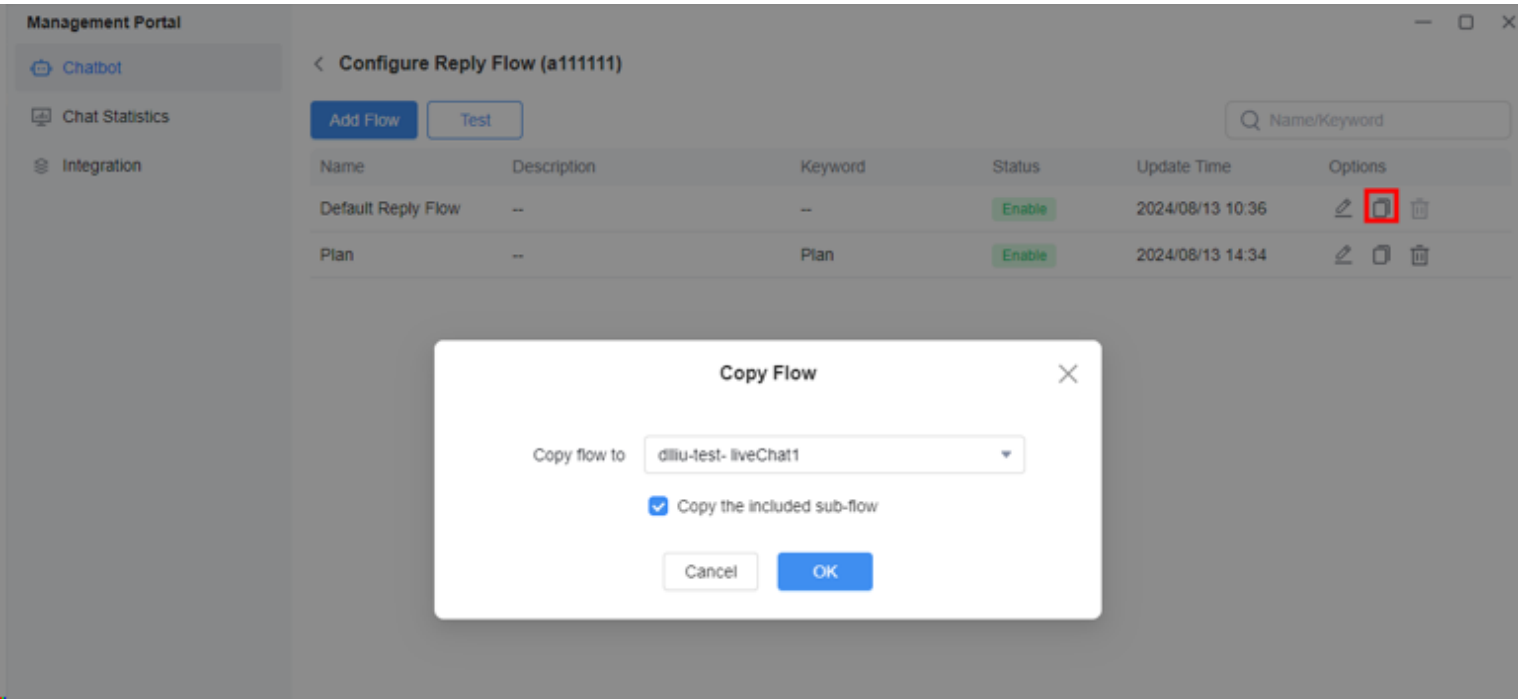


Publish the Reply Flow

Copy Reply Flow

You can copy the reply flow to other Live Chats.

1. Open the chatbot management page in **Application** → **Management Portal**.
2. Select the Chatbot you need to configure, click .
3. Select the flow to be copied then click the icon  to copy it.



Copy Flow

Copy flow to	Select the target Live Chat to which you want to copy the flow.
Copy the included sub-flow	Whether to copy all the sub-flows contained in the currently selected flow. For example, if you select “Default Reply Flow” to copy, all sub-flows used in “Default Reply Flow” will be copied to the target Live Chat.

Edit/Delete Reply Flow

- 1. Open the chatbot management page in **Application** → **Management Portal**.
- 2. Select the Chatbot you need to configure, click 
- 3. Select the flow to be edited and click the icon  to enter the flow editor. After editing, click the “Publish” button to publish the new flow.
- 4. Select the flow to be deleted and click the icon  to delete the selected flow. Only the current flow will be deleted, and the sub-flows contained in this flow will not be deleted.

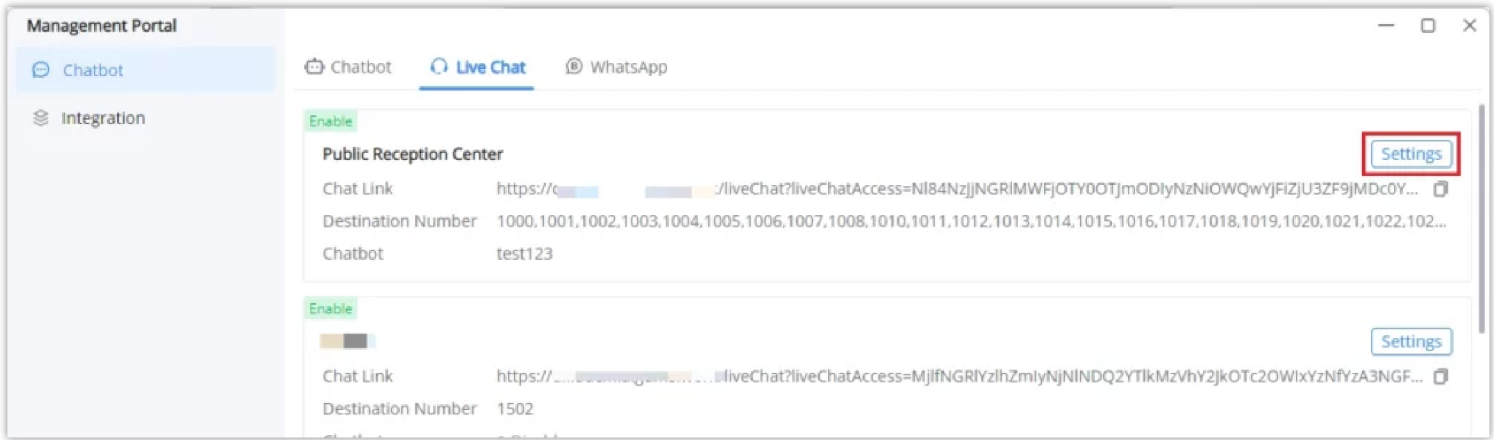
Note

Default Reply Flow cannot be deleted.

LIVE CHAT SETTINGS

To configure Live Chat features such as user info collection and message transfer, please follow the steps below:

- 1. Open the **Live Chat** tab page by navigating to **Application** → **Management Portal** in the Wave application.
- 2. Click  to configure the Live Chat parameters.



Live Chat Tab

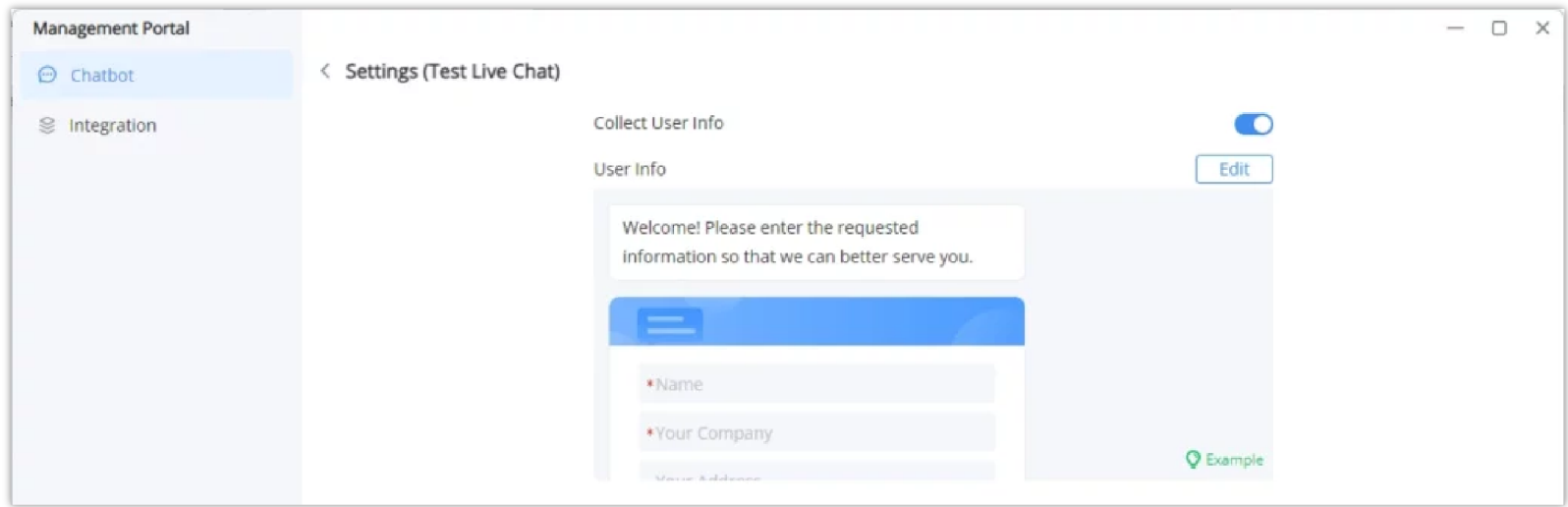
Each section below describes specific settings or features that can be configured after following the above steps.

Collect User Information

The Collect User Info setting allows users to gather essential details from visitors before they begin a Live Chat session. This ensures that the team has the necessary information to provide personalized and efficient support.

Once enabled, visitors will be prompted to complete an information form when they initiate a chat.

- 1. In the Live Chat settings, toggle **Collect User Info** to “On”.
- 2. Click the “**Edit**” button next to the **User Info** section.

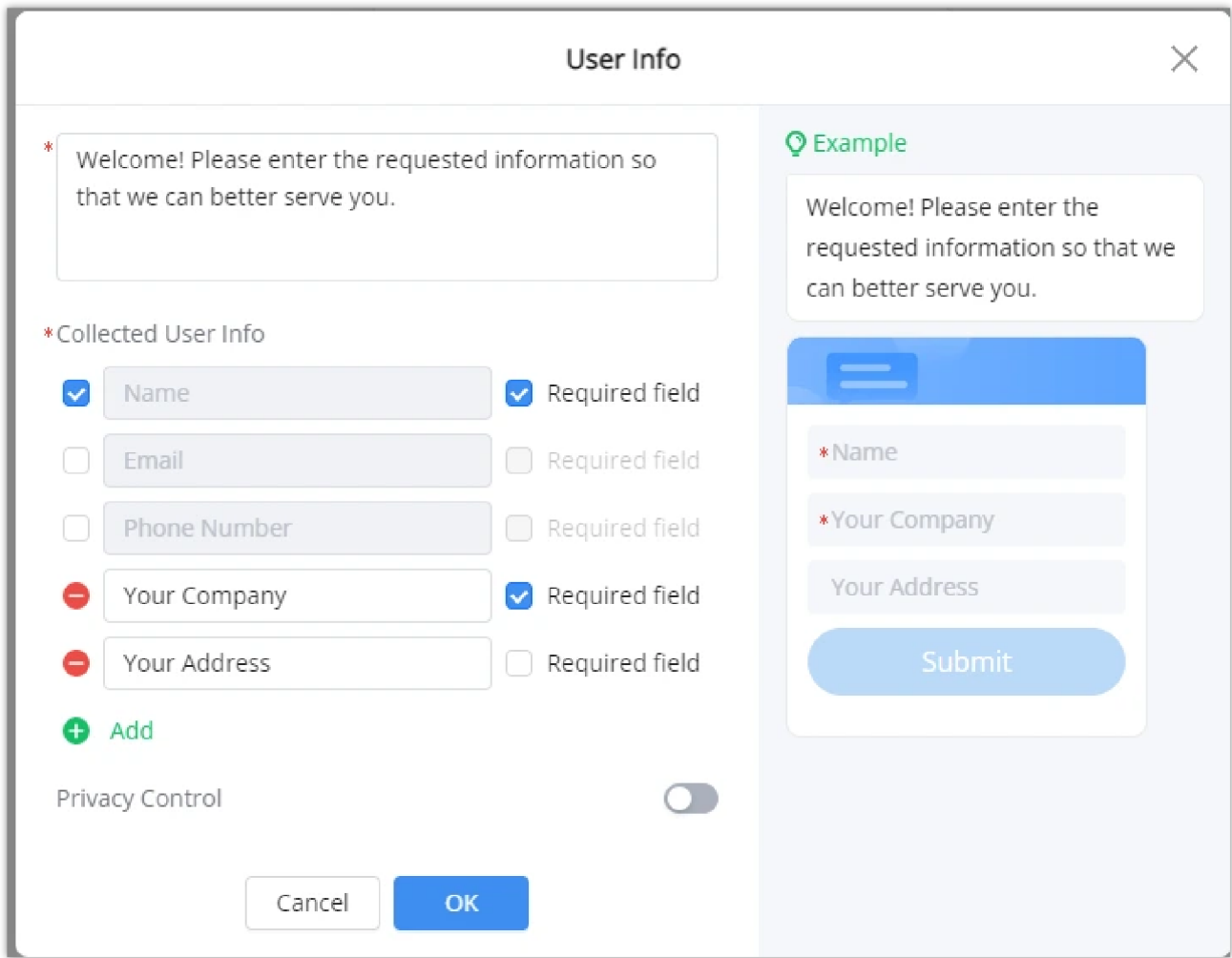


Live Chat Settings

- 3. Customize the message shown to visitors requesting their information. (**Example:** “Please provide your details so we can assist you better.”)
- 4. Configure the requested fields by specifying the information to be collected and selecting whether each field is required or optional.

Note:

By default, the form includes Name, Email, and Phone Number.



User Info Configuration

- 5. Toggle the “**Privacy Control**” option to require visitors to agree to a privacy policy before proceeding, and customize the privacy policy text to align with your organization’s compliance requirements.

User Info

* Welcome! Please enter the requested information so that we can better serve you.

* Collected User Info

- ☒ Name ☒ Required field
- ☐ Email ☐ Required field
- ☐ Phone Number ☐ Required field
- ☒ Your Company ☒ Required field
- ☒ Your Address ☐ Required field

+ Add

Privacy Control ☐

Cancel OK

Example

Welcome! Please enter the requested information so that we can better serve you.

Name

Your Company

Your Address

Submit

Privacy Control Option

Enable Chatbot

The Enable Chatbot function allows users to activate automatic replies for Live Chat sessions. Once enabled, you can select a previously created Chatbot to manage incoming messages.

1. In the Live Chat settings, toggle **Enable Chatbot** to "On".
2. Select the existing Chatbot to be used for the Live Chat session.
3. Configure the following modes after enabling the Chatbot:
 - **Automatic Reception:** Live Chat sessions are fully handled by the Chatbot by default. No message notifications are sent to Wave extension users (Agents). Agents will be notified only when the visitor clicks "Transfer to Agent."
 - **Chat Assistance:** Live Chat sessions are automatically replied to by the Chatbot, and messages are simultaneously notified to Wave extension users (Agents). Agents can receive message reminders promptly and take over the conversation.

Management Portal

Chatbot

Integration

< Settings (Test Live Chat)

Collect User Info ☒

User Info [Edit](#)

Welcome! Please enter the requested information so that we can better serve you.

Name

Your Company

Your Address

Example

Display sessions taken by other agents ☐

Enable Chatbot ☒

* Chatbot [View Reply Process](#)

test-auto-relay

Chatbot Mode ☐ Automatic Reception ☒ Chat Assistance

After Hours Prompt [Edit](#)

Overlapping time slots will cause multiple messages to be sent during the overlap.

Reply Time	Reply Contents
08:00-18:00	We are currently offline. Please leave a message, and we will respond back as soon as possible.

Cancel OK

Enable Chatbot

Transfer to Agent

If the Chatbot fails to automatically reply to a visitor’s message, it will send a configured fallback message prompting the visitor. When the visitor clicks “**Transfer to Agent**”, a notification will be sent to the assigned Wave extension user (Agent), allowing them to take over the chat session.

Note:

This configuration is required only when the Chatbot is enabled and Automatic Reception mode is selected.

Transfer to Agent

*Reply Contents

Click "Transfer to Agent" to start chatting with agent

*Button Name

Transfer to Agent

Cancel

OK

Transfer to Agent Configuration

After Hours Prompt

If your live agents have off-duty hours and are not available 24/7, you can configure an **After Hours Prompt**. This allows you to set a custom reminder message that will be automatically displayed to visitors who try to contact you outside of your working hours.

This feature supports setting different automatic reply messages for multiple time periods by configuring specific time ranges (start time, end time).

- When **Enable Chatbot** is turned on, this message will only be automatically sent if a visitor clicks “**Transfer to Agent**” or sends a message that the Chatbot cannot automatically reply to.
- When the Chatbot is disabled, this message will be automatically sent in response to the visitor’s first message.

Management Portal

Chatbot

Integration

< Settings (Test Live Chat)

Collect User Info

User Info

Welcome! Please enter the requested information so that we can better serve you.

Name

Your Company

Message Address

Example

Display sessions taken by other agents

Enable Chatbot

*Chatbot

test-auto-relay

View Reply Process

Chatbot Mode

Automatic Reception

Chat Assistance

After Hours Prompt

Overlapping time slots will cause multiple messages to be sent during the overlap.

Reply Time

Reply Contents

08:00-18:00

We are currently offline. Please leave a message, and we will respond back as soon as possible.

Cancel

OK

After Hours Prompt List

After Hours Prompt

*After Hours

18:00 → 08:00

*Reply Contents

We are currently offline. Please leave a message, and we will respond back as soon as possible.

Cancel

OK

After Hours Prompt Configuration

Welcome Message and Reply to First Message

When the Chatbot is disabled, Wave provides options to set automated responses that improve visitor engagement and provide timely communication.

- **Welcome Message:** This message appears to visitors immediately when they open the Live Chat window. It can be used to greet visitors, or provide basic instructions.
- **Reply to First Message:** This option automatically sends a reply to the visitor’s first message in the chat, ensuring prompt acknowledgment even without an active agent or chatbot response.

Note:

If an After Hours Prompt is configured for your support schedule, it will override this reply during off-duty hours and be sent first. Otherwise, the default reply set here will be used.

REFERENCES

[Live Chat – User Guide](#)

[Wave Administrator Guide](#)

[Wave Desktop – User Guide](#)