Chatbot User Manual

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Introduction

.dodocs ChatBot designed for internal and external usage, it could be configured to assist your customers or your employees highly effectively.

dodocs ChatBot is customizable. You can select microservices that would be enabled in your version of .dodocs ChatBot: OCR, mailbox API, WhatsApp API, .dodocs drafting, data indexing, document builder, google docs integrations and others.

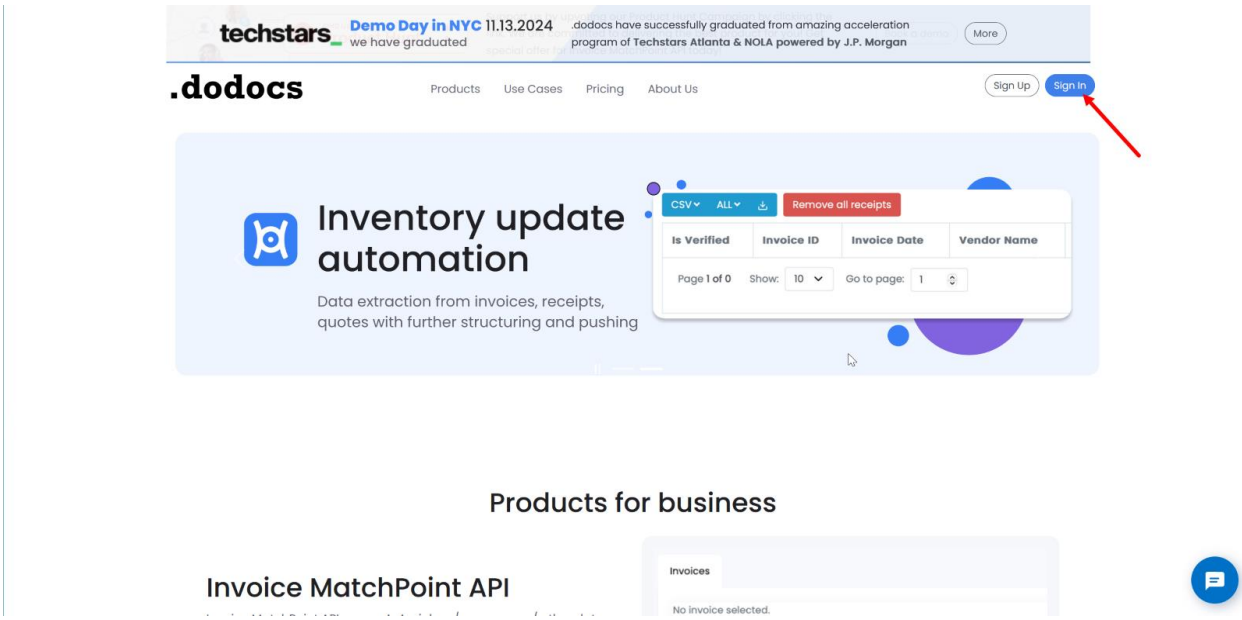
Main purpose of .dodocs ChatBot is to automate a process that requires series of manual actions involving different data sources, software products. Asking a .dodocs ChatBot a question activates enabled microservices that starts to perform their tasks receiving output data from each previous microservices as an input data to the next one.

Benefits of Using a Chatbot

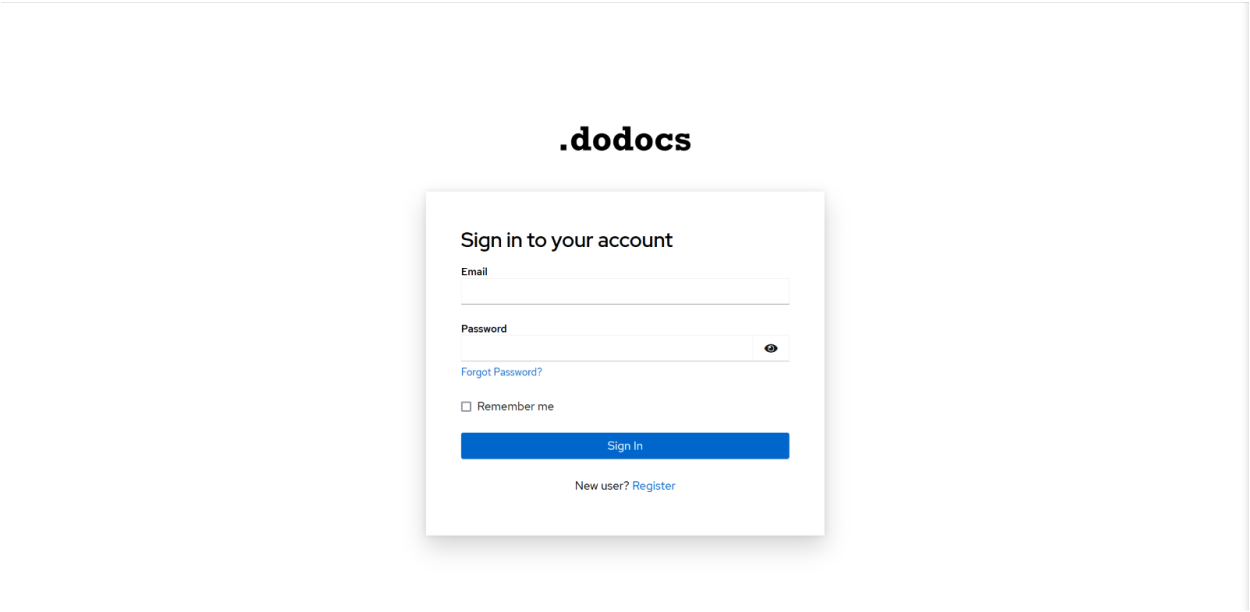
- Handling Any File Types The chatbot works with various file formats, offering flexibility and convenience.
- Document Filling Automated filling saves time and reduces errors, boosting workflow efficiency.
- Access to Knowledge Base Quick access to the knowledge base and document archive simplifies information retrieval.
- Sequence Detection & Interaction The chatbot identifies data sequences and asks clarifying questions for personalized user interaction.

Logging in

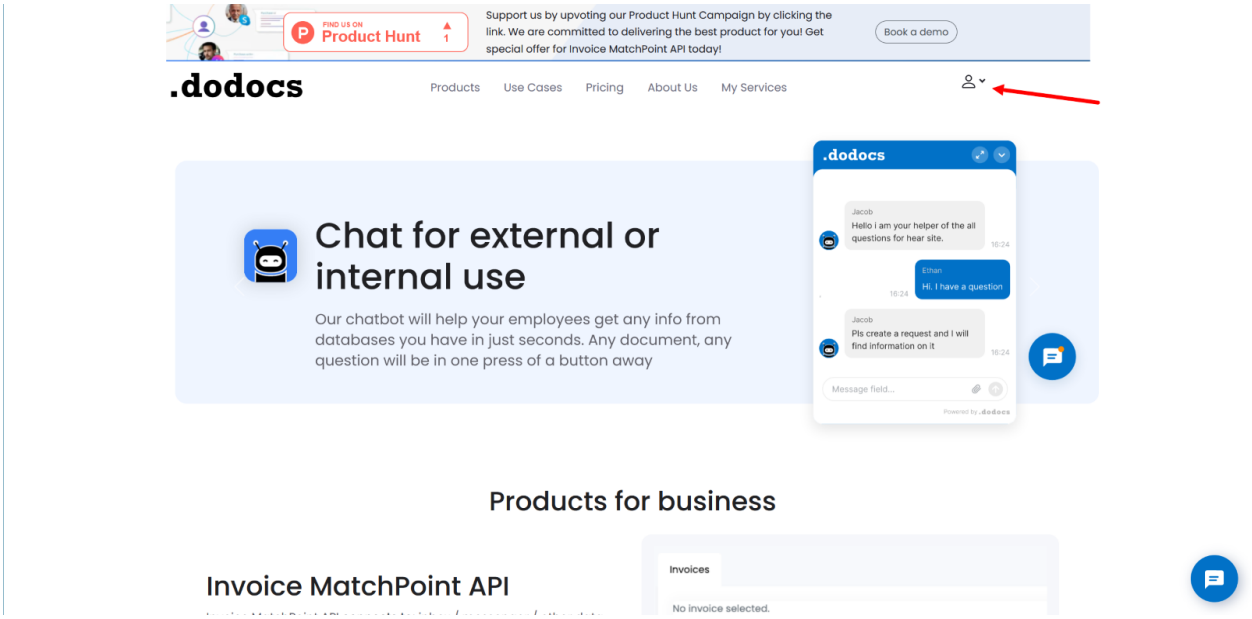
1) Click a “Sign in” button.

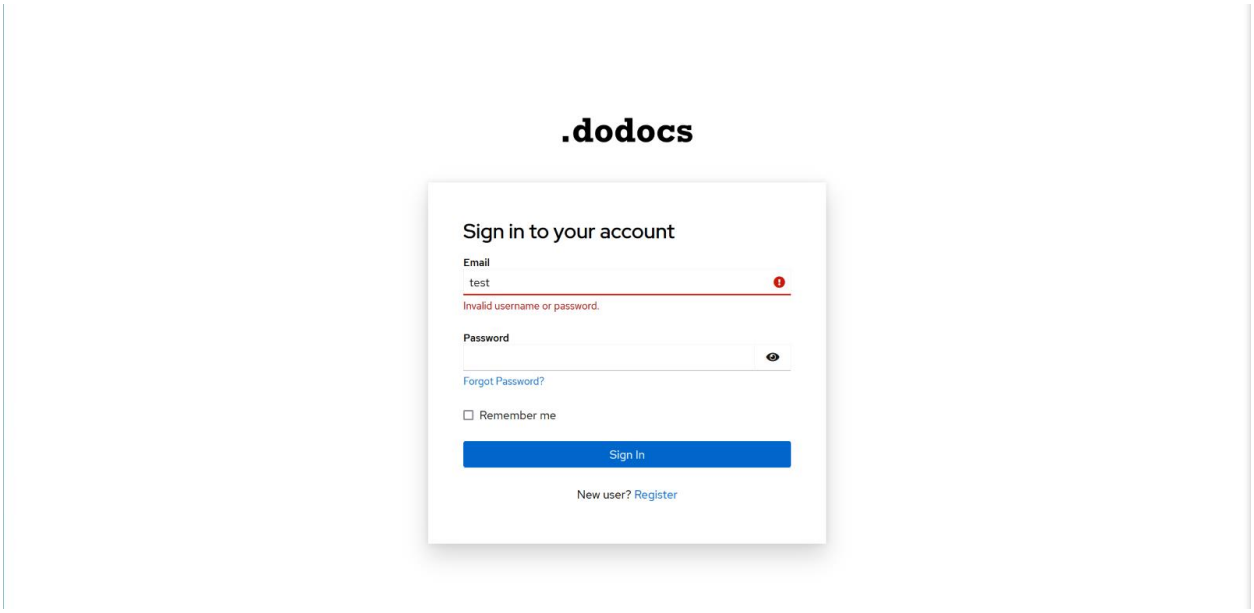


2) This button will take you to a page, where you have to enter your email and password.



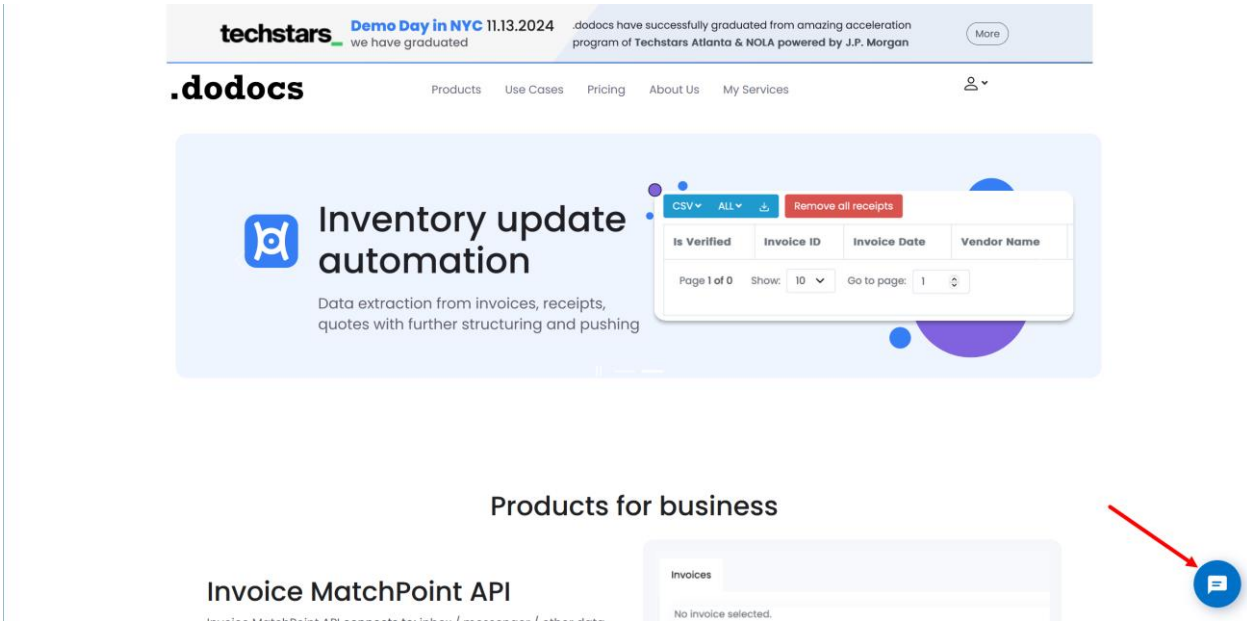
3) After that press a “Sign in” button.
4) If you entered the correct information, the page will change back to the main page and on it the “Sign up” and “Sign in” buttons will become a button with a stylized human on it. Otherwise the Sign in window will stay open and a red sentence that says “Invalid username or password” will appear.



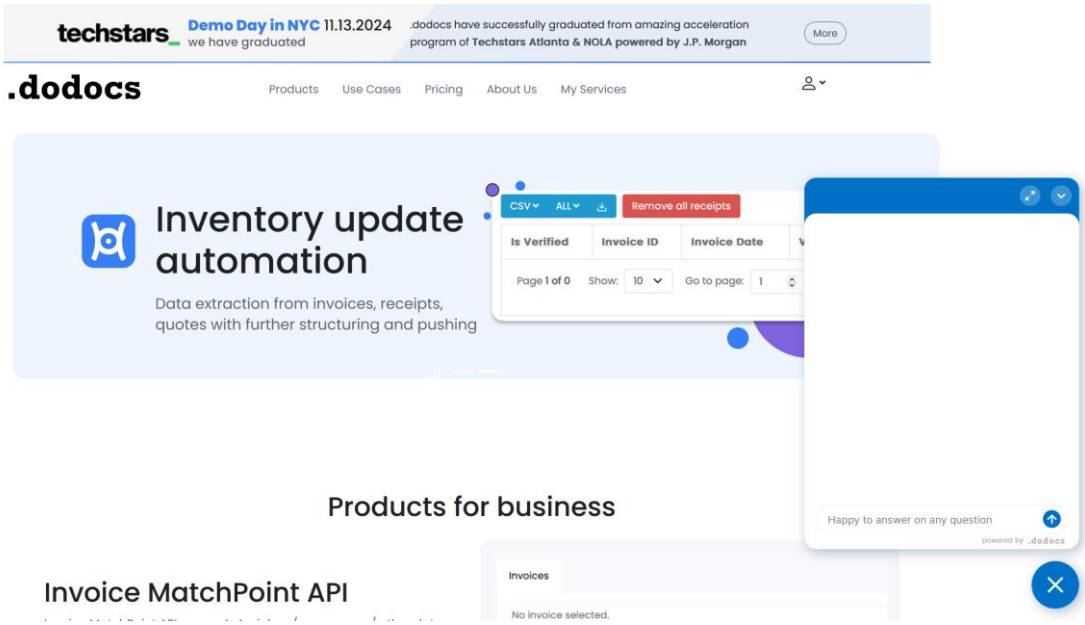


Using Chatbot

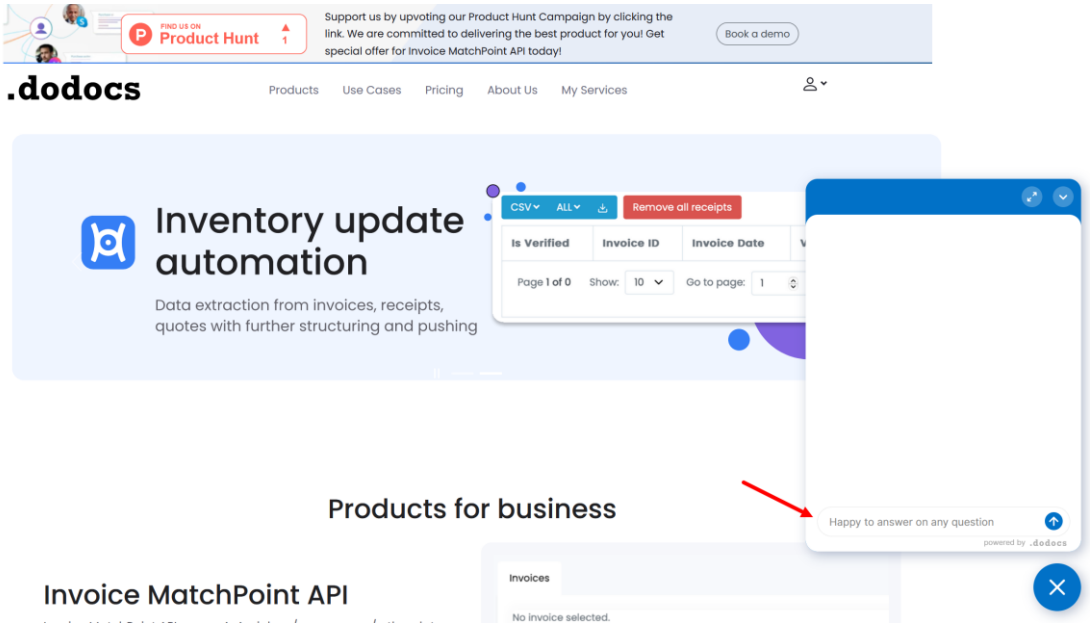
1. You can access Chatbot on dodocs.ai by clicking the chat button, even while logged out.



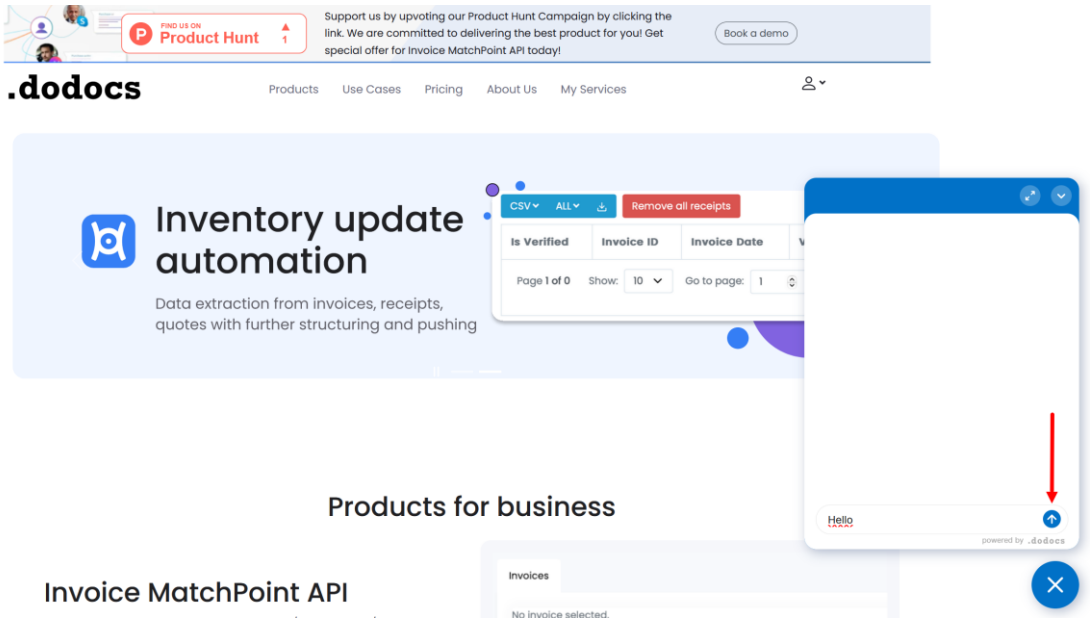
2. It opens up a chat, where you can write to the bot.


techstars_ Demo Day in NYC 11.13.2024
we have graduated
.dodocs have successfully graduated from amazing acceleration program of Techstars Atlanta & NOLA powered by J.P. Morgan
More
.dodocs
Products
Use Cases
Pricing
About Us
My Services
Inventory update automation
Data extraction from invoices, receipts, quotes with further structuring and pushing
CSV
ALL
Remove all receipts
Is Verified
Invoice ID
Invoice Date
Page 1 of 0
Show: 10
Go to page: 1
Products for business
Invoice MatchPoint API
Invoices
No invoice selected.
Happy to answer on any question
powered by .dodocs

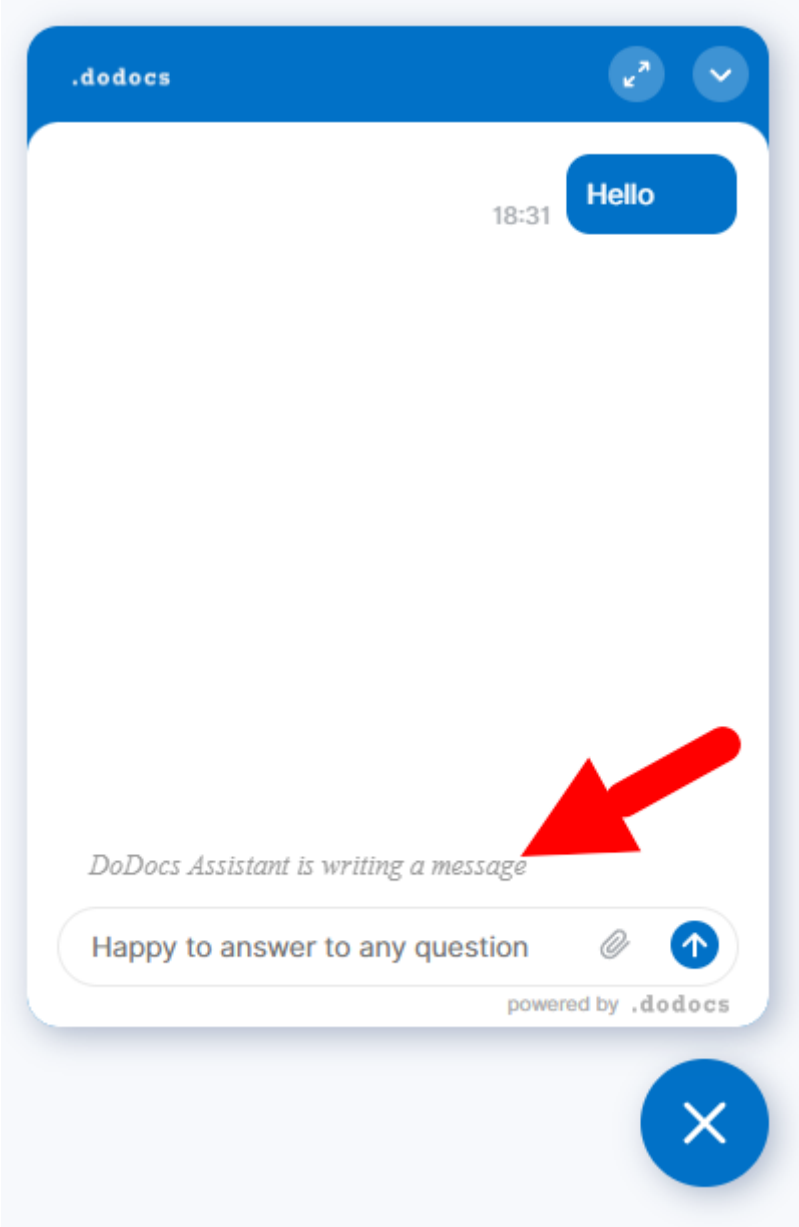
3. To write something, click on the input field and start writing.



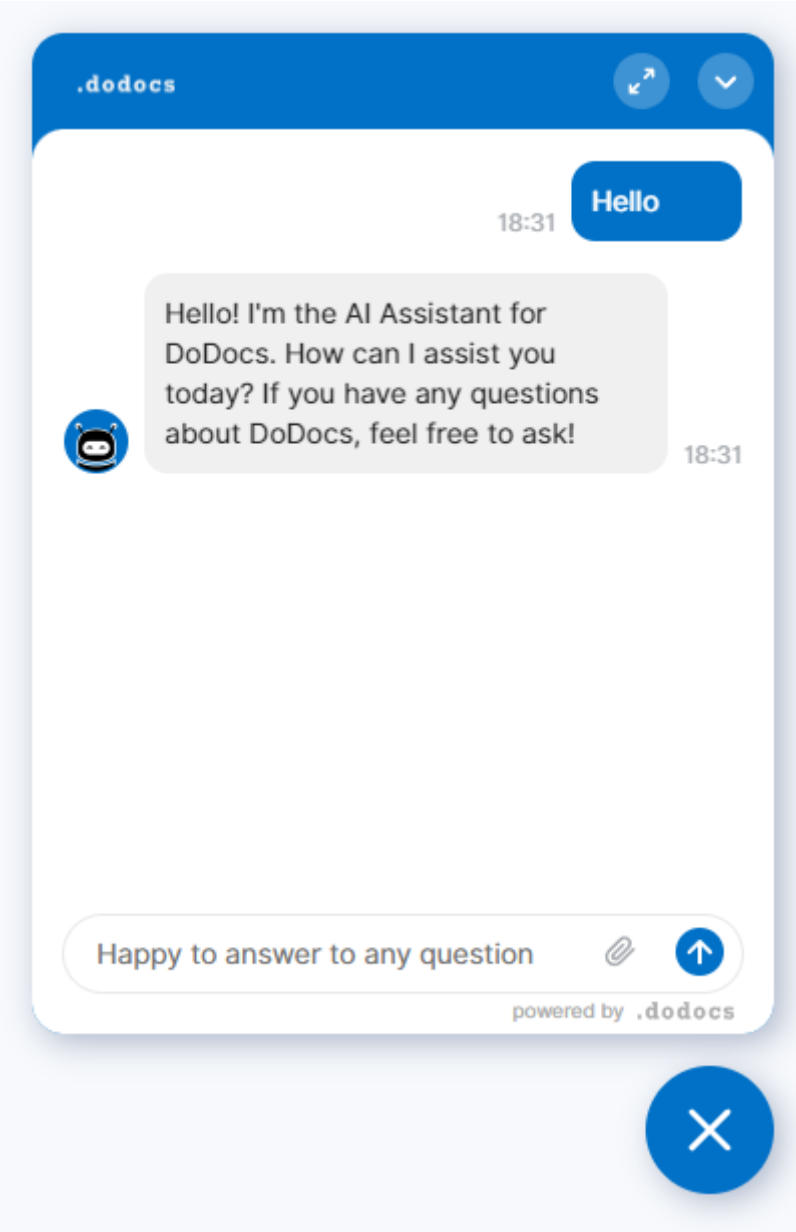
4. After that, to send a message, you must either click Enter or an arrow button.



5. After the message is sent you will see blinking words above the input field. They indicate that the bot is generating an answer to your message.

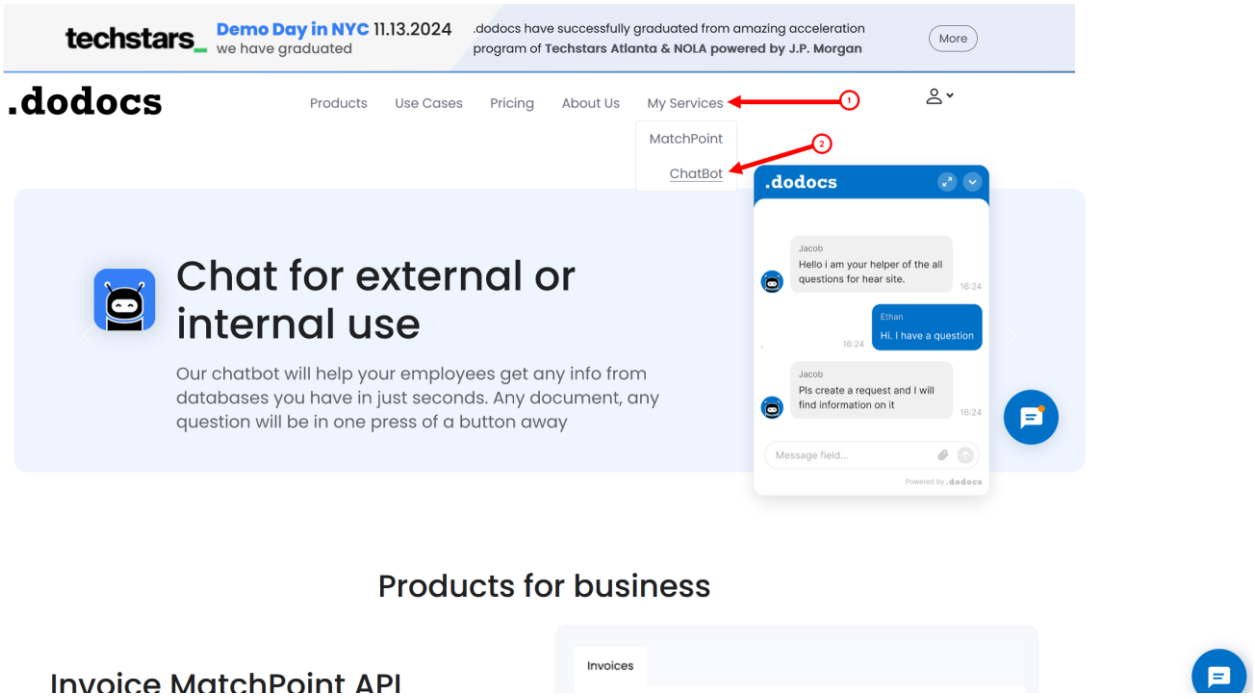


6. After a few seconds the bot will answer you.

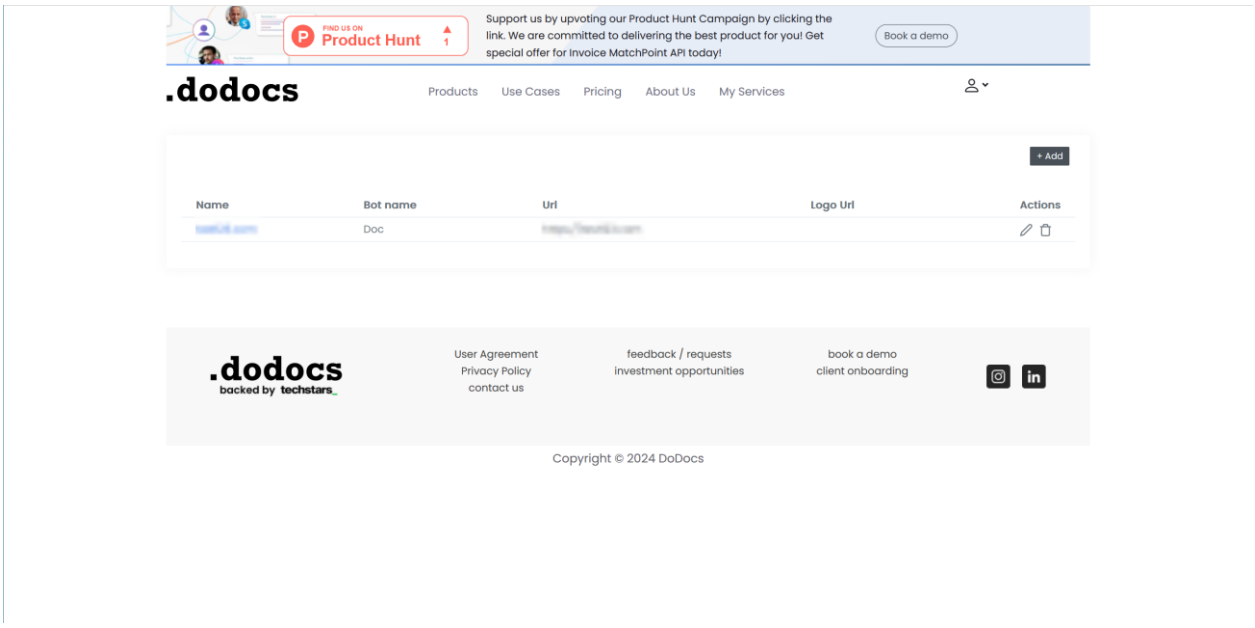


Chatbot Configuration

1. After you Sign in ”My Services” button (1) will appear. Hover your cursor over it. A ChatBot button (2) will appear. Click on it.

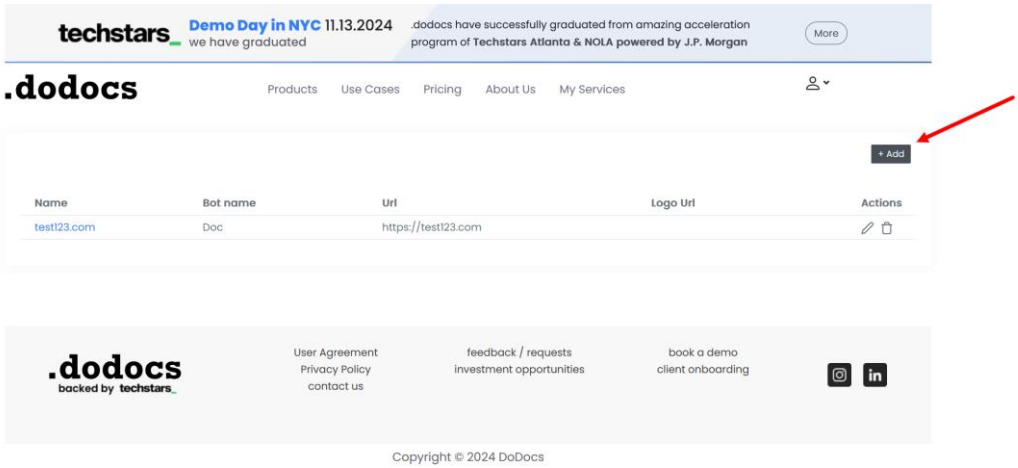


2. You will enter the Chatbot page. You will see a table for the bots. If you’ve just started, you will not see any bots here.

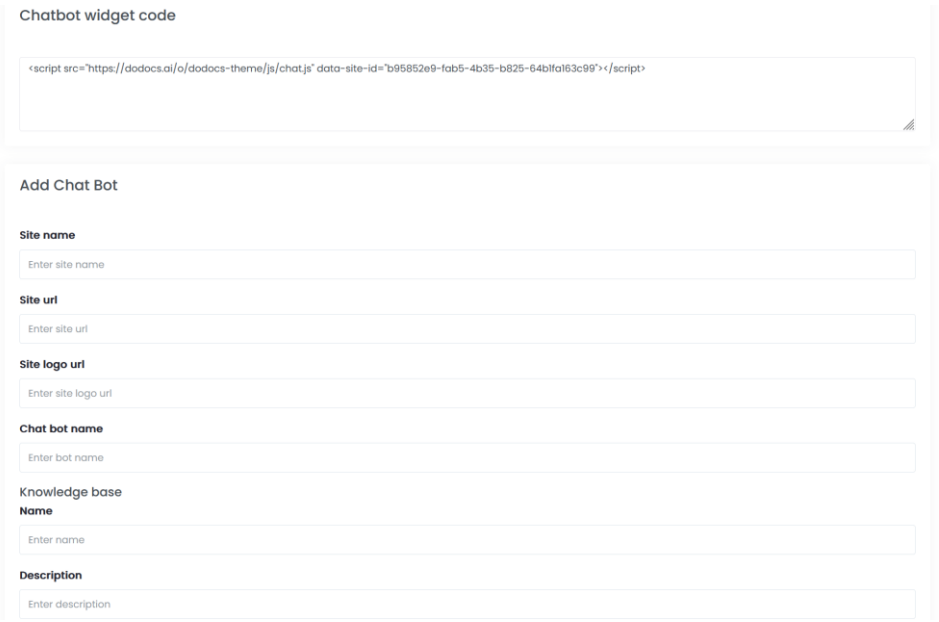


Adding a new bot

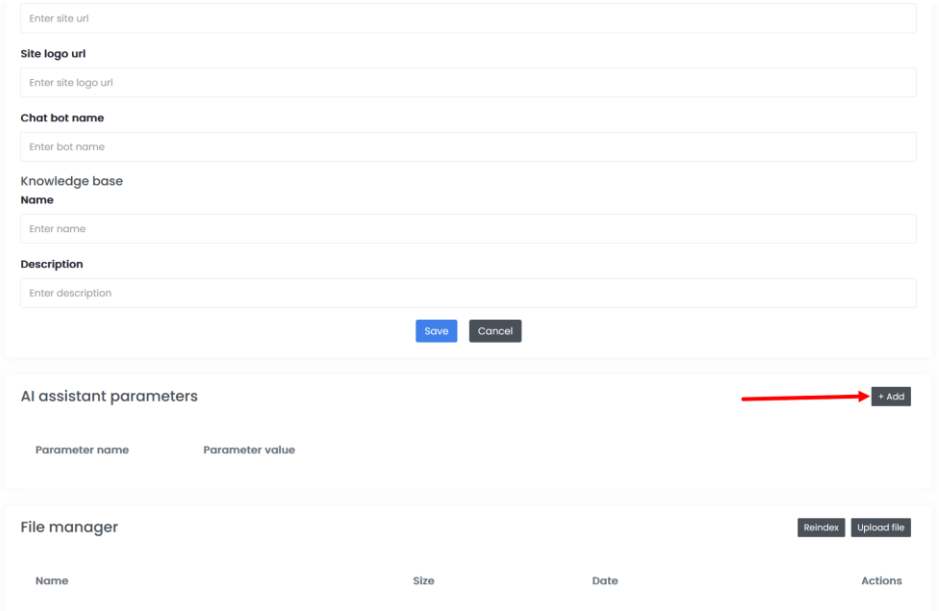
1. Here you can open a menu for adding a new bot by clicking an “+ Add” button.



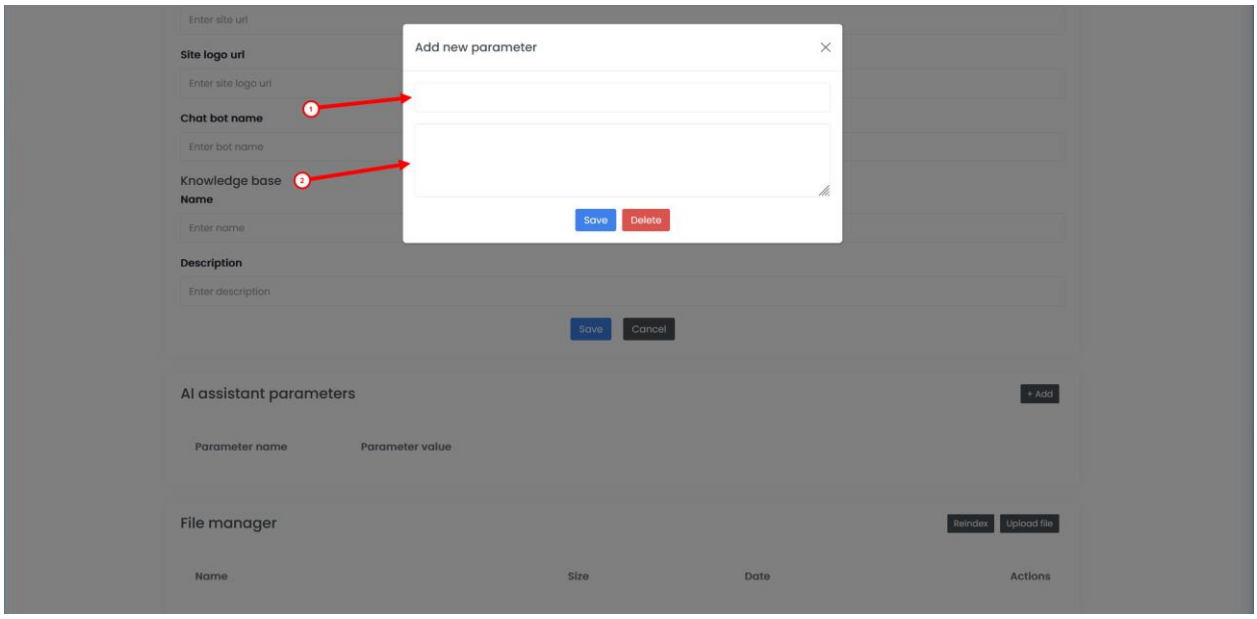
2. In this menu you will see multiple sections. The 1st one is “Chatbot widget code”.
3. The 2nd section is “Add Chat Bot”. Here you must enter information about your site (site name, site url, site logo url) and the bot (Chat bot name) in according fields. There is also a sub-section for a knowledge base.



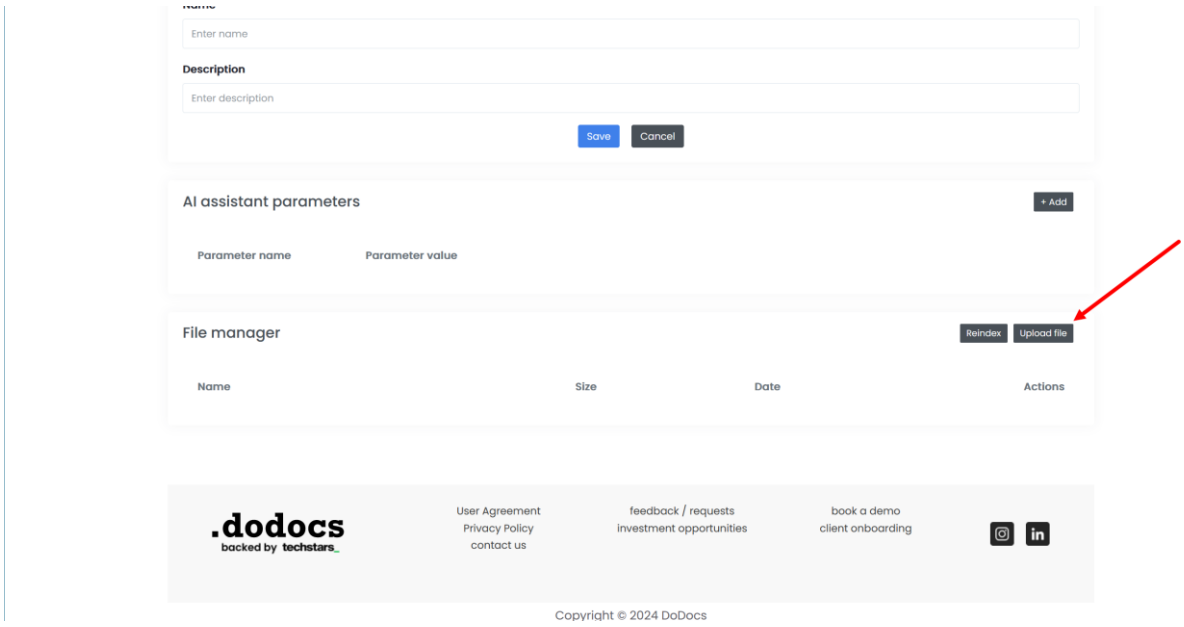
4. The 3rd section is “AI assistant parameters”. You can use it to enter parameters that the bot will follow. To do it, click “+ Add” button.



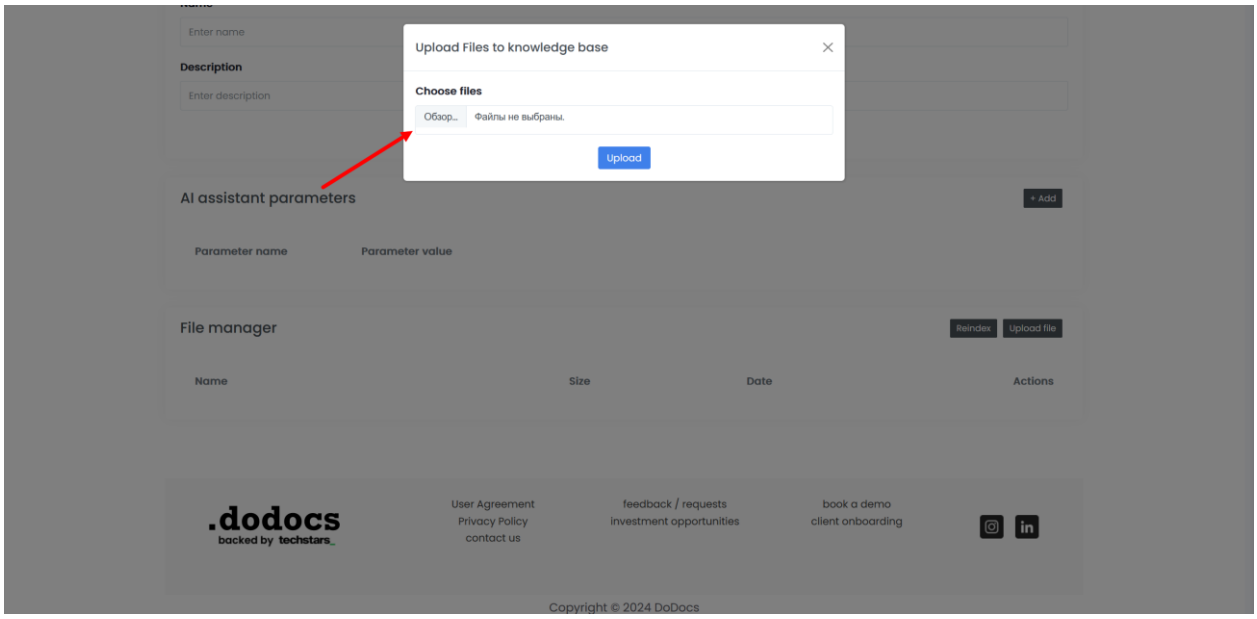
5. The “+ Add” button opens a menu, in which you must enter a name for a parameter in the 1st field and what it does in the 2nd field.



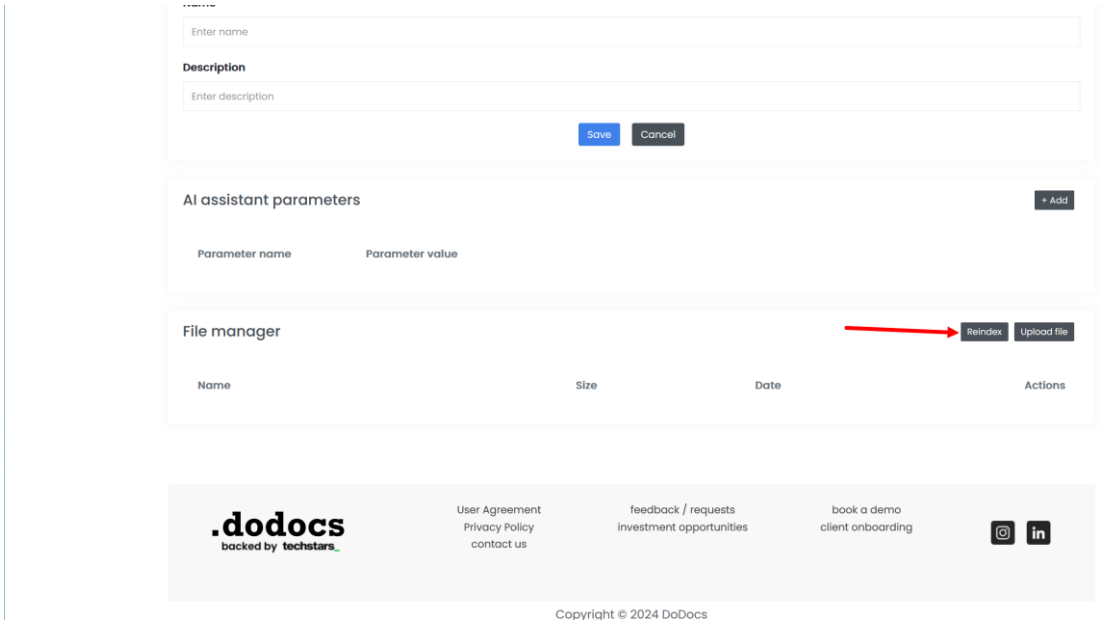
6. After you fill parameter’s information, you can click “Save” to save it. This menu will close after you click save.
7. The 4th section is “File manager”. In this section you can add files that the bot will use when generating it’s answers. To do that, click “Upload file”.



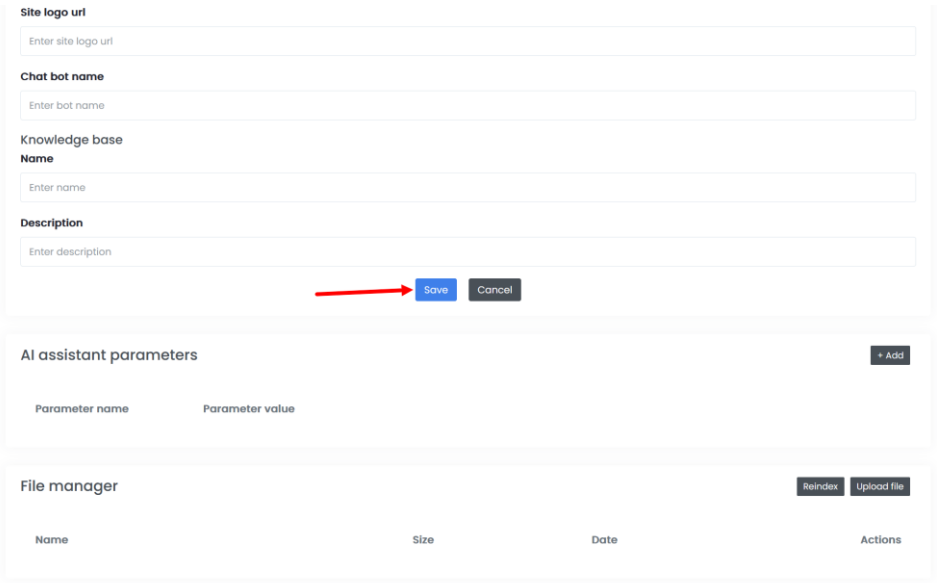
8. The “Upload file” button will open a menu, in which you can click “Choose files” to add files from your computer.



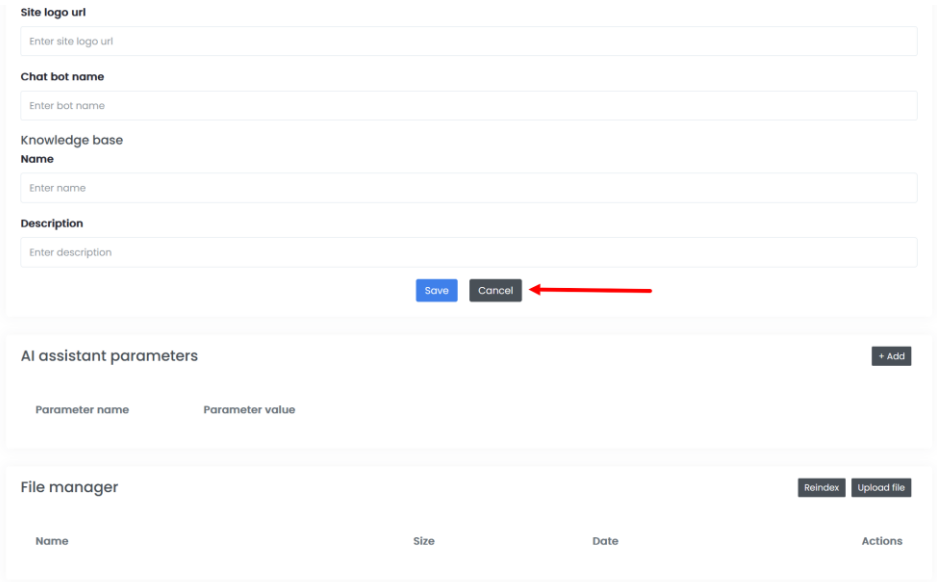
9. “Choose files” button opens File Manager program window, where you can pick a file or multiple to upload to the knowledge base.
10. After that click “Upload” to upload files to the knowledge base.
11. When this menu closes, click “Reindex” button to update bot’s knowledge base. Otherwise it won’t be able to use information from the documents.



12. After you are done adding and editing information for the new bot, click “Save” button to save the bot.

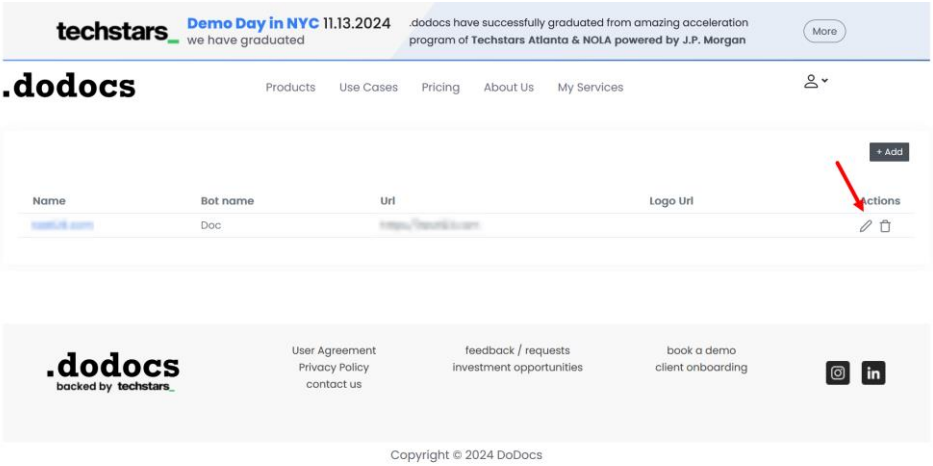


13. If for some reason you need to exit this menu without saving all your changes, you can click “Cancel” button.



Editing an existing bot

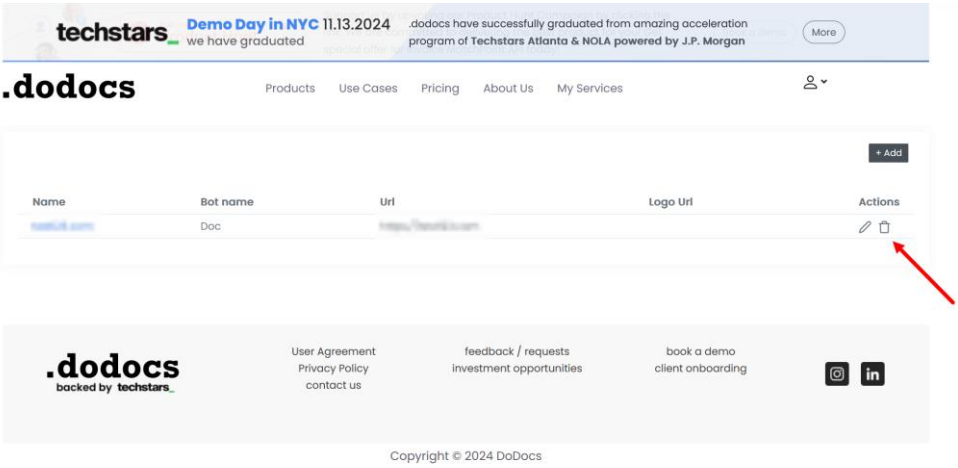
1. From the “Chatbot” menu you can open a menu for editing an existing bot by clicking a button with a pencil symbol on the right side of the bot that you want to redact.



1) This button will open the same menu as in “**Adding a new bot**”, except that you redact an already existing bot, rather than creating a new one. Refer to “**Adding a new bot**” to see what you can do in this menu.

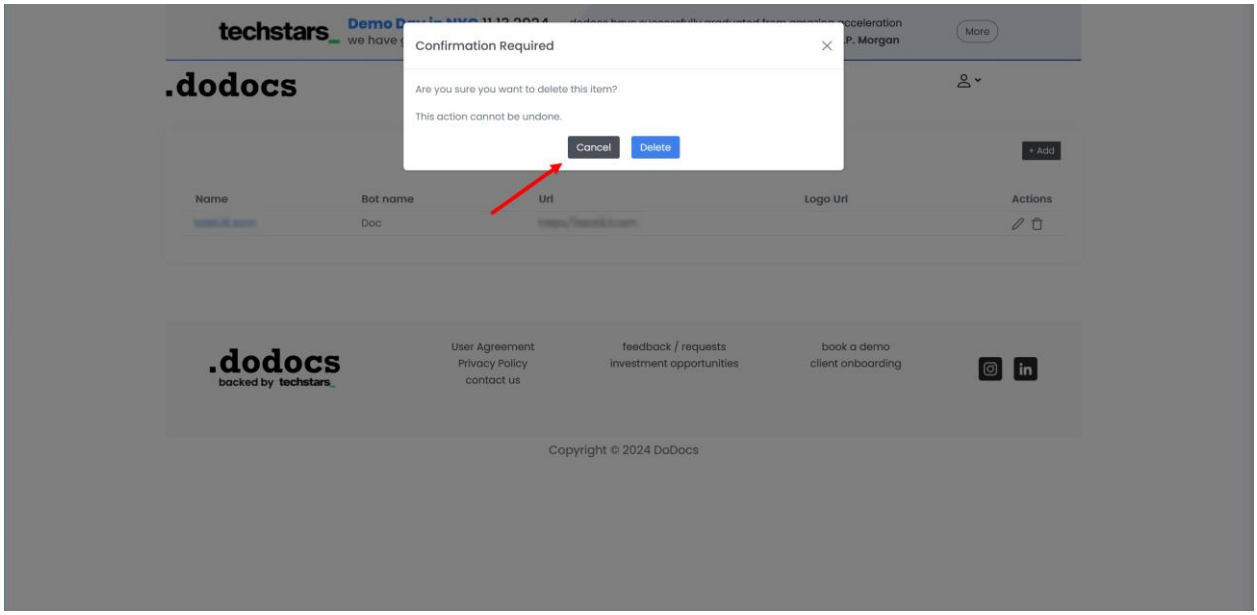
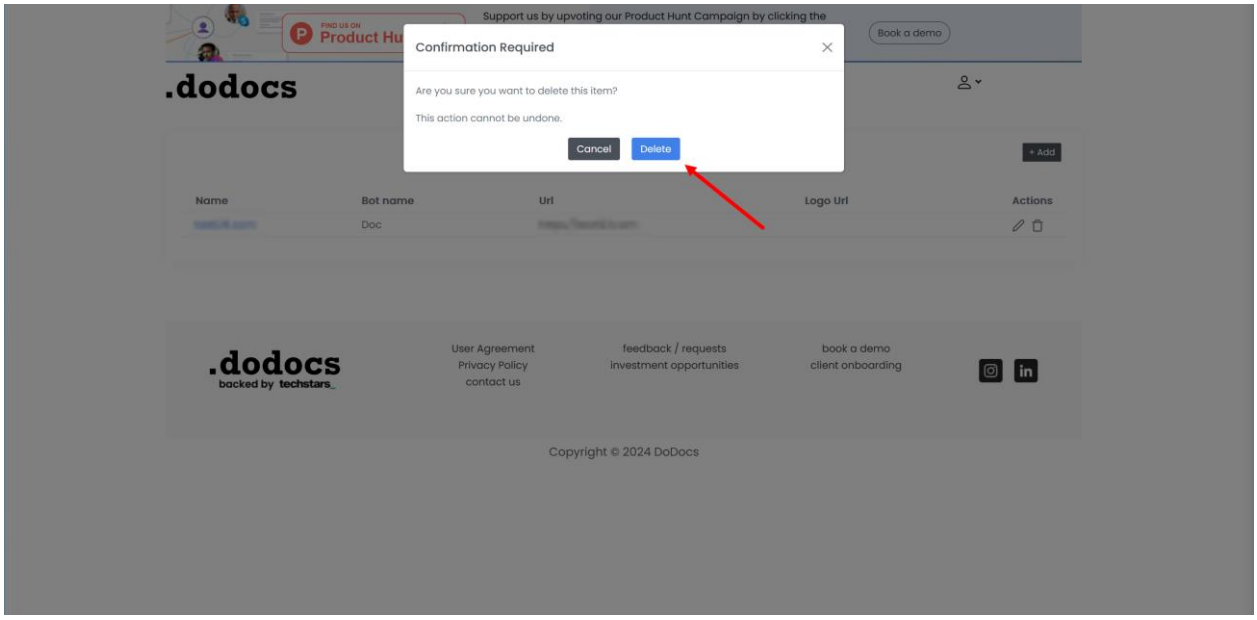
Deleting a bot

2) To delete a bot, click a trash can symbol on the right side of the bot that you want to delete.



3) After you click the trash can symbol, a menu “Confirmation Required” will open, asking you, if you are sure that you want to delete the bot. Please note, that this action cannot be undone.

4) If you don't want to delete the bot, then click the "Cancel" button.



5) If you want to delete the bot, then click the "Delete" button.