

✓ Developers starting guide

chat2desk.kz

info@chat2desk.kz

List of changes

Date	Version	Changes
27.07.2019	1.02	iFrame integration
12.12.2018	1.01	Hints section added
01.12.2018	1.00	Initial version

What is Chat2Desk?

Chat2Desk is a leading messengers aggregation platform for two-way communications via messengers and social networks: WhatsApp, Viber, Facebook, Instagram, Telegram, VKontakte, Skype, Odnoklassniki, Avito, Twitter, Email, Online chat, SMS and more.

The service has various options and features: many chat assignment options, groups of operators, self-service menu, chat bots, macros, API, scripts, tags, surveys, URL tracking, black lists, statistics, Sales tunnels and more.

What can Chat2Desk do for you?

Using Chat2Desk you can:

- ✔ Integrate helpdesk support into your product (app, bot, CRM) with operators working via Chat2Desk web site
- ✔ Communicate with clients via messengers from inside your service
- ✔ Build chat bots and *Sales tunnels* (Sales pipelines) that work inside popular messengers
- ✔ Send notification messages to your clients
- ✔ Send WhatsApp or Viber business cards upon voice call or lead form completion
- ✔ Export clients (leads) to your CRM and more

How to build for Chat2Desk

There are 5 ways for you to create integrations:

1. API
2. Scripts
3. iFrame **New**
4. POST request using macro
5. HTTP-request from Sales tunnel

Before you begin, you should be registered at chat2desk.kz. To start using the service in full mode [contact](#) our support.

1. API

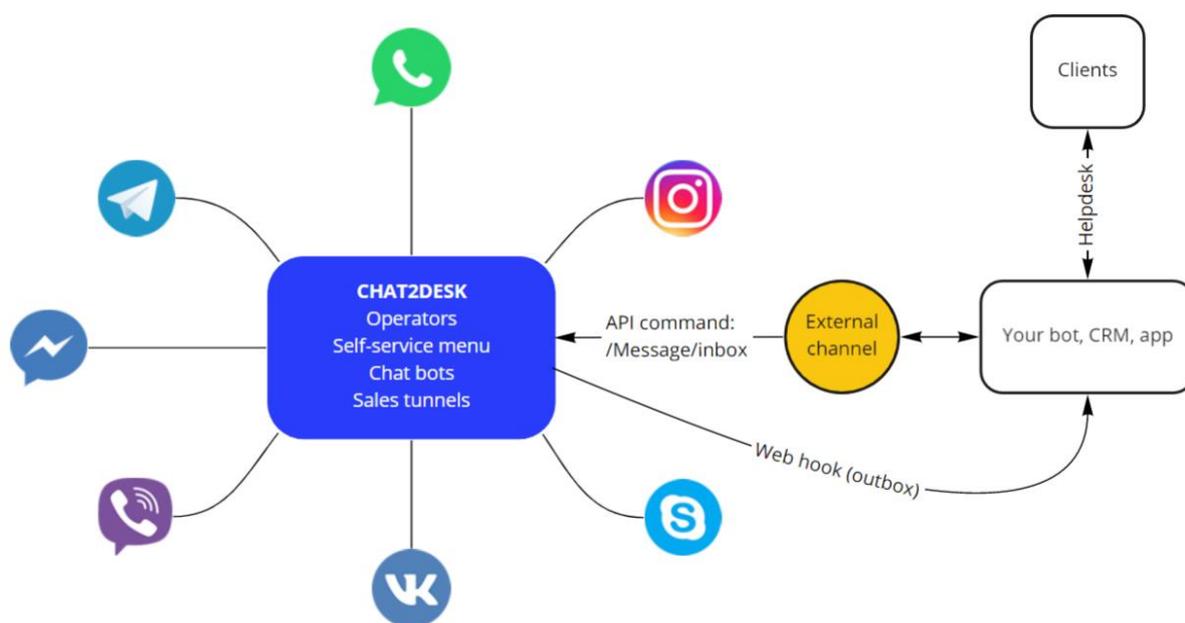
API manual is available [here](#). With API you can send and receive messages, use [web hooks](#), get info about your clients, operators, etc. You should call Chat2Desk API functions from your own server (so you need to have one).

Integrating Chat2Desk helpdesk

In order to implement helpdesk support via Chat2Desk operators into your own product, you should use [external channel](#). It allows to transmit messages from your clients to Chat2Desk.

- To pass **messages from your clients** to Chat2Desk use API command *message/inbox* (POST).
- To get **answers from Chat2Desk** (operators, chat bots, Sales tunnel, auto answers, etc) you should use web hook for *outbox* event and then forward them to clients of your product.

See [API manual](#).



Principal scheme of external channel

[Contact](#) our support to connect the external channel to your account.

2. Scripts

Script manual is available [here](#). Chat2Desk scripts are based on [Python](#) language. Scripts are stored and run on Chat2Desk servers so, unlike API, you don't need your own server. To edit the script, make sure you are already registered and then go to [Settings/Scripts](#). To turn the script functionality on, [contact](#) our support.

Scripts are another way of programming Chat2Desk. They have most of Python libraries and functionality as well as specialized Chat2Desk functions. Basically, they are used to do actions over chats and messages in real time. For example:

- ✔ Inform supervisor about overdue chats
- ✔ Send a WhatsApp or Viber business card to a client after voice call or lead form completion
- ✔ Send message to a client after closing a dialog

Many tasks can be solved both using scripts as well as API. Remember that you can call API functions inside the script.

Scripts are based on **events** and their corresponding handlers. Some of these events are:

- ✔ A new message arrived
- ✔ Outgoing message is sent
- ✔ A tag is assigned
- ✔ A dialog was closed
- ✔ A client info was changed and more

Calling your script

As was described above, script handlers are called automatically when corresponding event happens. But you can have your own functions and call them in several ways:

- ✔ When a chat bot is triggered. See [Settings/Chat bots](#) > Create a *key words set* and specify your script function*.
- ✔ When a client uses specified menu item. See [Settings/Self-service menu](#) > Create a menu item and specify your script function*.
- ✔ Using macros. See [Settings/Macros](#). You can add calling a script function* as one of the macro **actions**. Macros are run from *Chats* section using star button.
- ✔ From the **outside service** – by calling dedicated Chat2Desk URL. You can obtain this URL from [Settings/Scripts](#) > In the script events list look for *Web hook call from external service (manually_handler) your web hook is {your URL}*.

When this URL is called using POST or GET methods, corresponding Chat2Desk handler *Manually_handler* is run and the request data is available inside this handler in *input_data* variable.

Using this scenario, a *WhatsApp business card* feature works: when a customer makes a phone call to your company, the telephony service calls this URL and passes the caller's phone. The corresponding script handler *Manually_handler* initiates a new chat with this customer and sends a specified message via WhatsApp. See this script example in [Scripts manual](#).

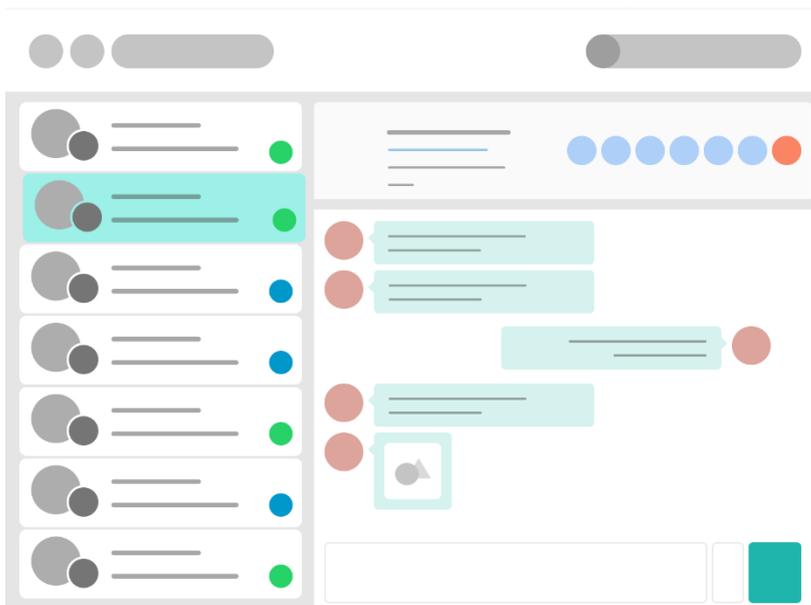
* The function should be inside *Handler* class and be called as specified + "_handler". Example: `def macro_call_handler(self, input_data, c2d).`

3. iFrame New

It is possible to run Chat2Desk inside your service using iframe. The user must be logged in to Chat2Desk. If not, the user will be redirected to login page.

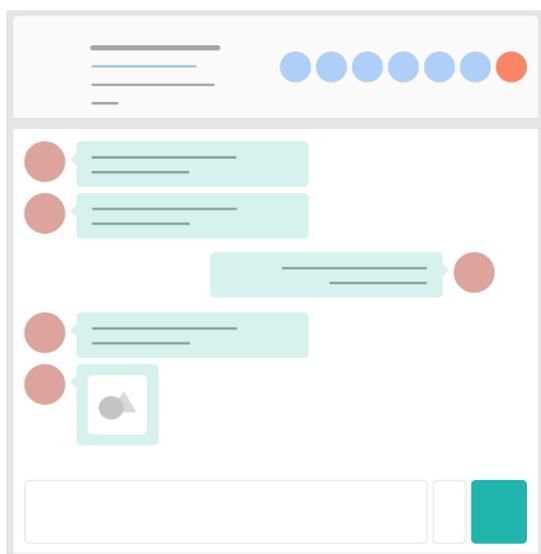
There are 3 modes for displaying the Chat2Desk UI inside iframe:

- ✔ Left menu hidden. Use this regular URL to a dialog along with **minifiedView** parameter which can take values 1, 2 or 3. In this case *dialogID* is optional.



```
https://web.chat2desk.kz/chat/all?dialogID=63&minifiedView=1
```

- ✔ Only the dialog specified in URL with ability to reply.



```
https://web.chat2desk.kz/chat/all?dialogID=63&minifiedView=2
```

- ✔ Only the content of specified dialog, without ability to reply.



```
https://web.chat2desk.kz/chat/all?dialogID=63&minifiedView=3
```

4. POST request using macro

With **macros** you can run one or more preset actions with just one click in chat with a client. One of the actions inside a macro may be a POST request to external URL. The request contains a **complete data** about the current client, chat and operator.

When setting up the macro action, you can specify *authorization token* to send with the POST request. If the external service returns “URL” data field, the specified URL is opened in separate browser tab.

This way you can export the clients (*leads*) from Chat2Desk to external CRM systems and then display a resulting web page to the chat’s operator.

5. HTTP-request from Sales tunnel

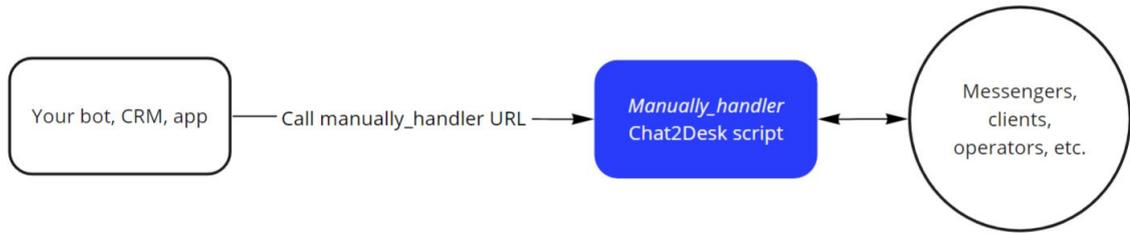
Sales tunnel (also known as *Sales pipeline*) is a Chat2Desk marketing tool which lets you automatically send a chain of messages to your clients based on their data and actions. The tunnel can consider many parameters and events and can perform various actions on each tunnel step. One of the Sales tunnel actions is running a **HTTP-request**.

Hints

Here are some hints about working with Chat2Desk service.

1. Call **manually_handler URL** from **any service** to trigger action with messages or chats in Chat2Desk.

For example, send WhatsApp message to a client after he or she left phone number on your site or his or her order has arrived.



2. If you need to **process low scores of clients**, for example, forward them to manager’s email, you can use this scenario:
 - a. Set up tag assignment for desired scores in *Settings/Quality scores > Scores*. The tag will be assigned to valuation *request* (not to the client). See *request* definition in Statistics manual.
 - b. Set up web hook for assigning tags to requests – *add_tag_to_request* event and specify **manually_handler URL** as web hook URL.
 - c. In the script’s handler see what tag was assigned. If it is the one, that you use for scores, do the desired actions.
3. Same scenario may be used to run a script when a client **selects a specified menu item**. Set up tag request assignment for this menu item in *Settings/Self-service menu* and go on with the web hook.

4. Sales tunnels may be used for many purposes:
 - ✔ **Questioning**. It is possible to save each client answer to specified client info card field.
 - ✔ **Payments**. Sales tunnels allow to automatically generate payment links upon keywords or template in operators reply.

5. How to know that a client **doesn't have WhatsApp** account?
- ✔ Send a message to this client
 - ✔ Wait 20 sec.
 - ✔ This client is not registered in WhatsApp if you receive system reply with this fixed text: *WhatsApp client not found.*
 - ✔ Then you may try to resend the message using Viber.

Contact for more info

Feel free to use these resources for more information:

- ✔ Chat2Desk Telegram channels:
 - @c2d_news (in Russian) - tg://resolve?domain=c2d_news or https://t.me/c2d_news
 - @c2d_news_en (in English) - https://t.me/c2d_news_en
- ✔ Widget with messengers in the corner at chat2desk.kz
- ✔ info@chat2desk.kz