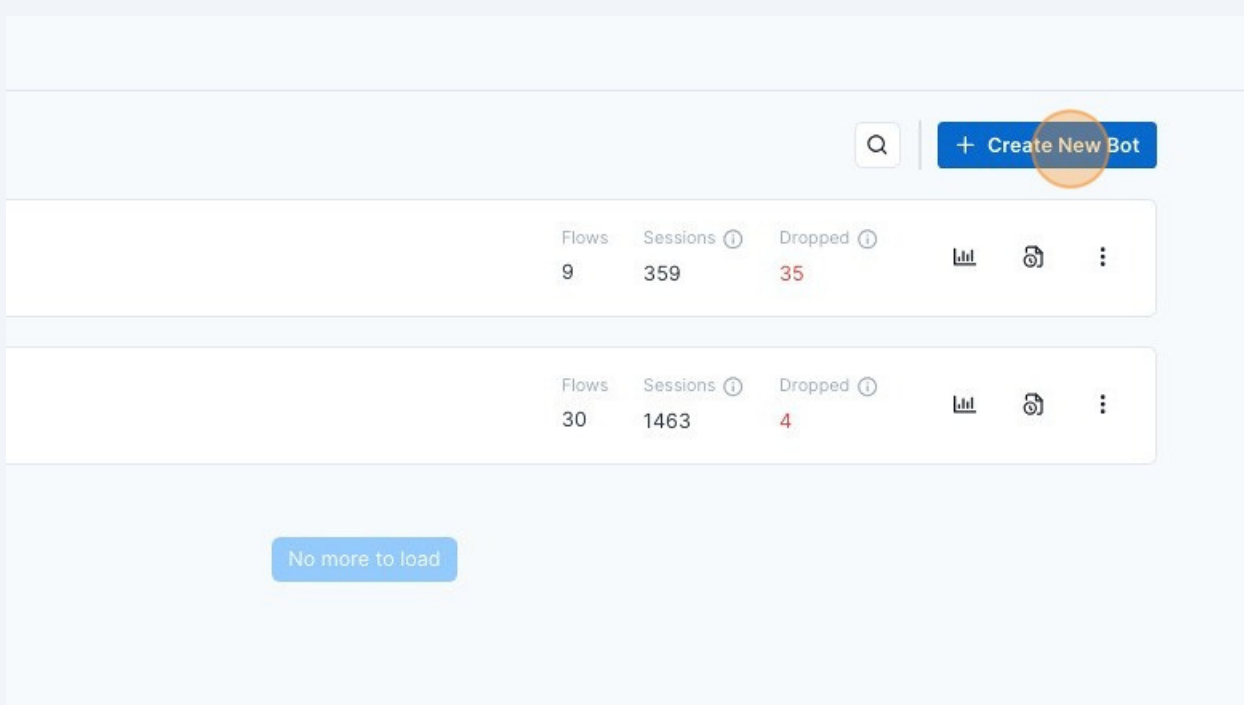


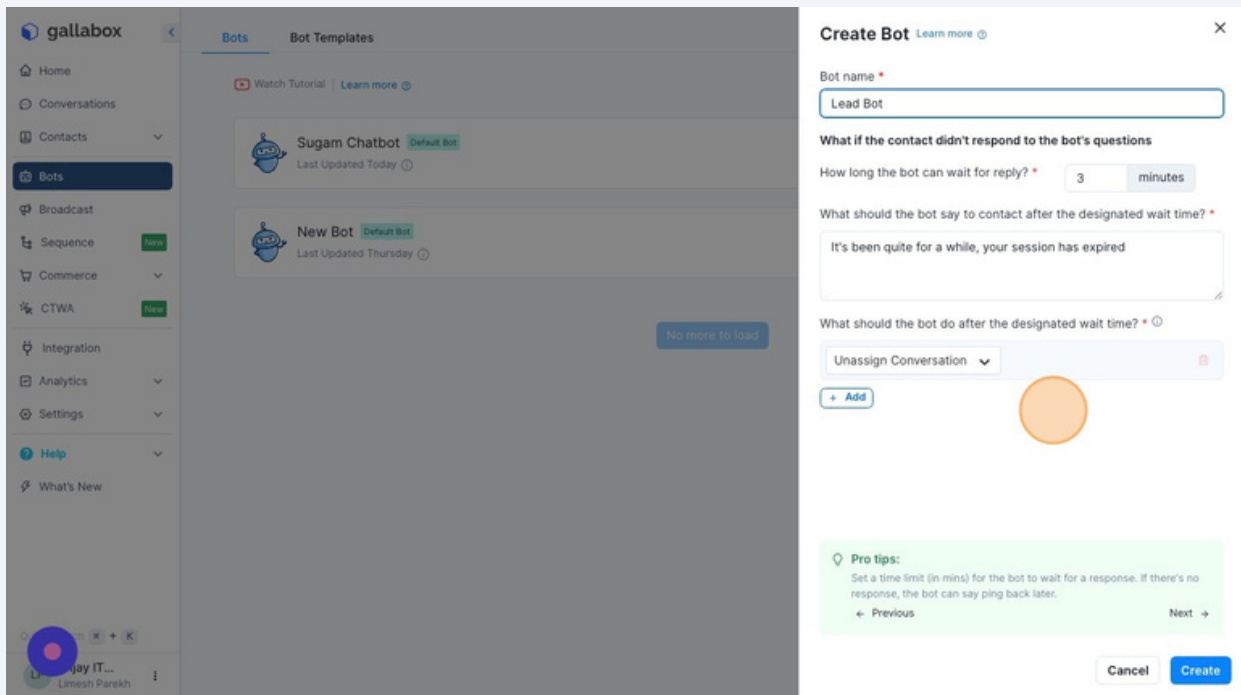
Build WhatsApp ChatBot in Gallabox to Create Leads in Sangam CRM

1 Navigate to <https://app.gallabox.com/bots>

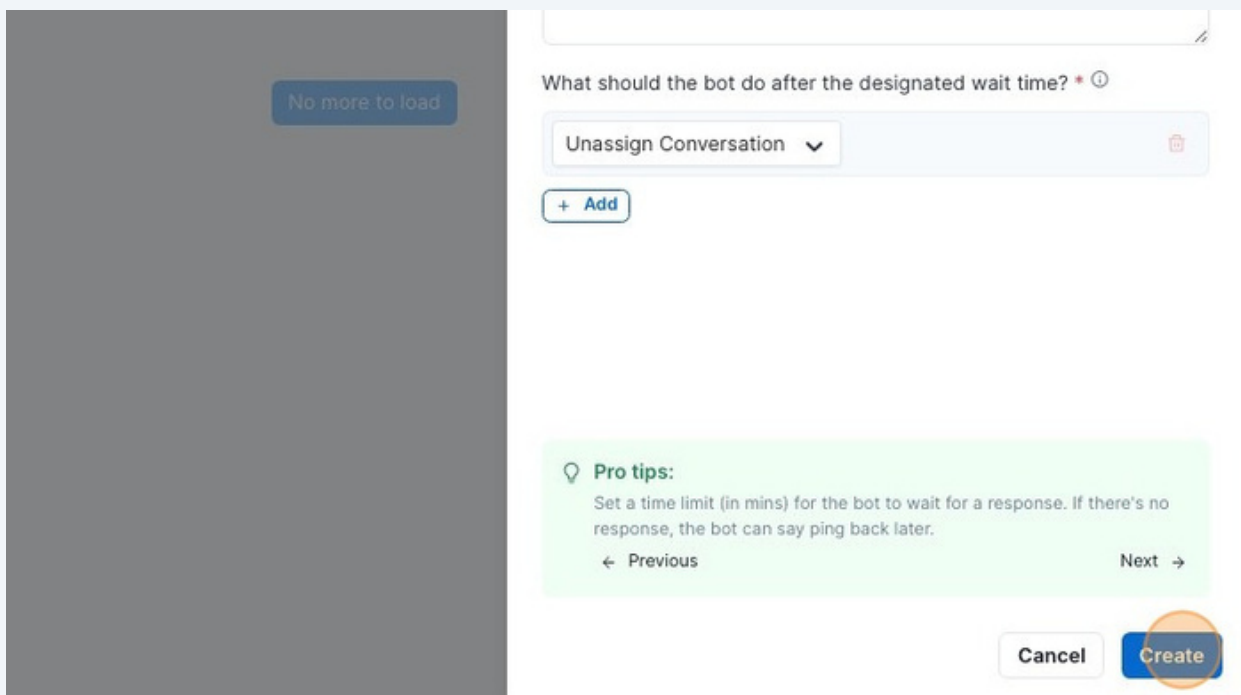
2 If you haven't created any bot before, click on "Create New Bot". If you already have one bot, then jump to Step 5.



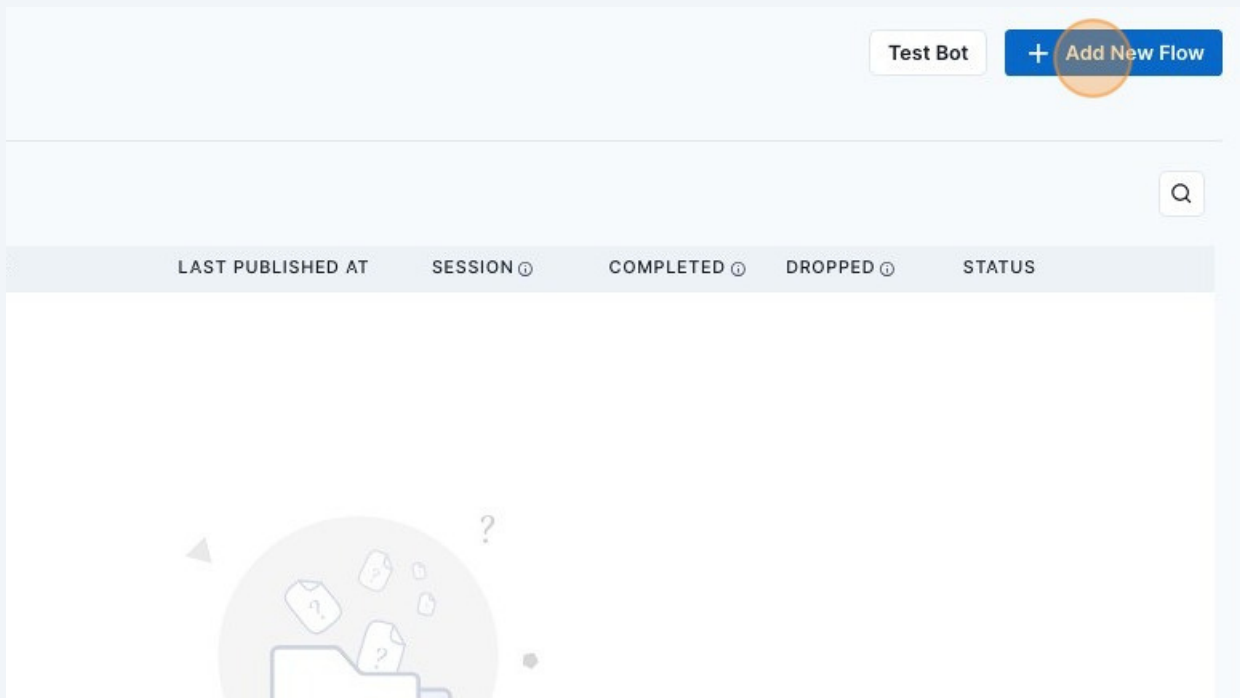
3 You may name it as "Your Company Name + Bot "



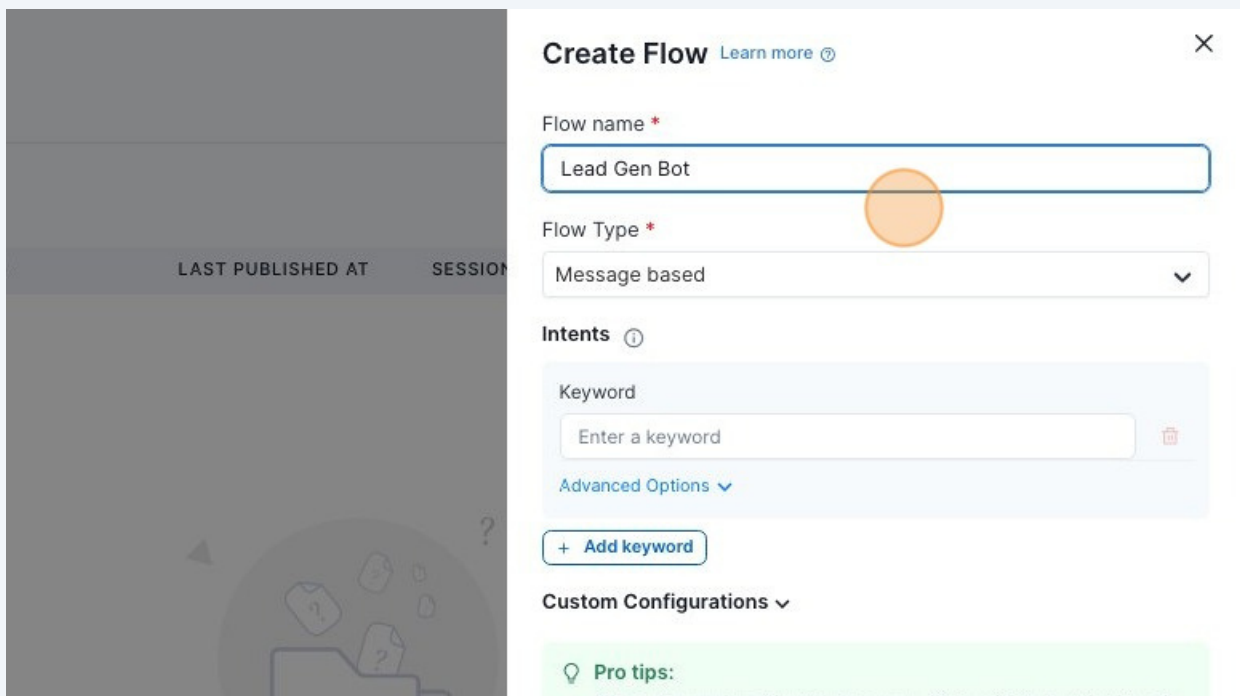
4 Click on "Create" to create your first Bot.



5 Click "Add New" to create a "Lead Gen Flow".

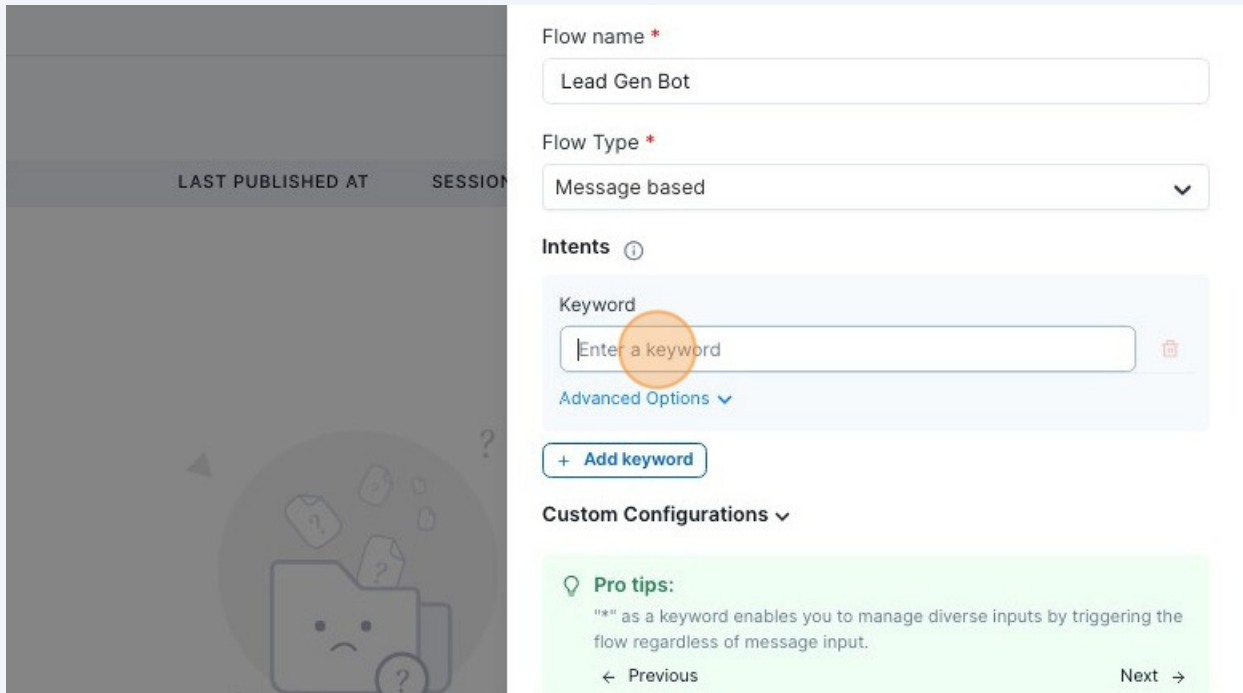


6 You may give the Flow Name as "Lead Gen Bot Flow".



7

In the Keyword Section, add the keyword for which you want to trigger the flow. Say you want to trigger the flow when user says, "Product Inquiry". Then write Product Inquiry in keyword section.



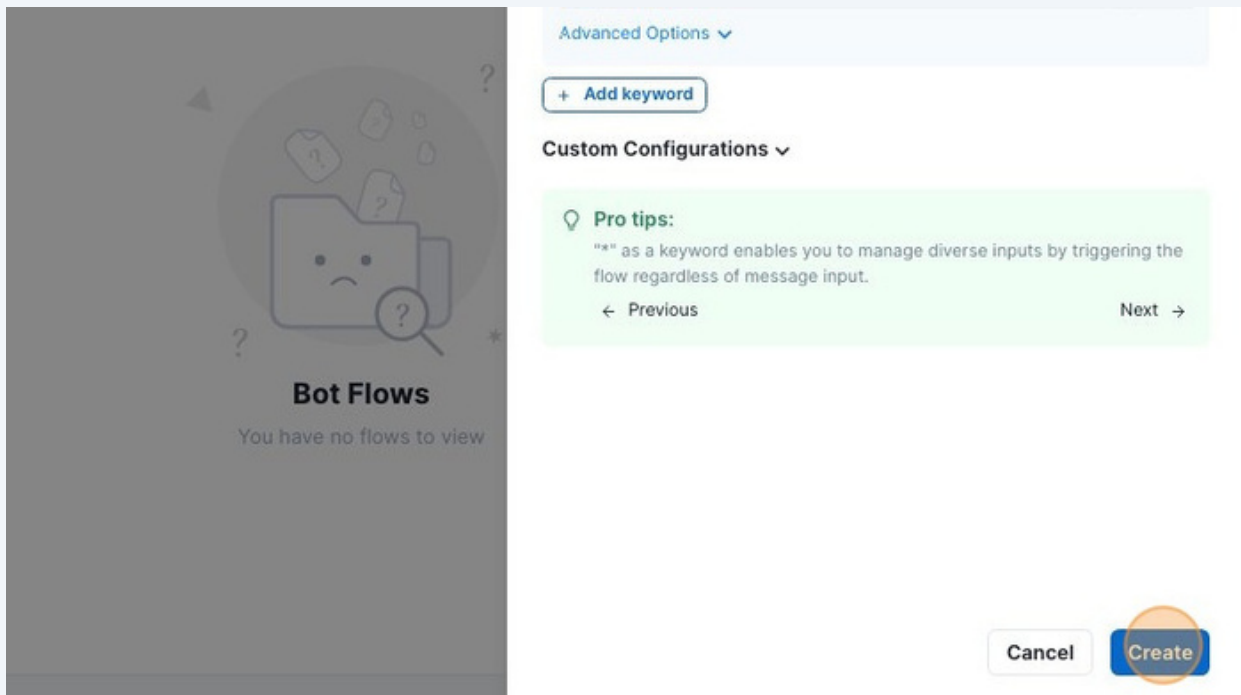
The screenshot displays a configuration interface for a chatbot flow. On the left, a blurred preview of a chatbot interface is visible, showing a folder icon with a sad face and question marks. The main configuration area on the right includes the following sections:

- Flow name ***: A text input field containing "Lead Gen Bot".
- Flow Type ***: A dropdown menu set to "Message based".
- Intents**: A section with a sub-header and an information icon. It contains a "Keyword" input field with the placeholder text "Enter a keyword". This input field is highlighted with an orange circle. Below the input field is a link for "Advanced Options" and a "+ Add keyword" button.
- Custom Configurations**: A section with a dropdown arrow, containing a "Pro tips" box with a lightbulb icon and the text: " "*" as a keyword enables you to manage diverse inputs by triggering the flow regardless of message input. " Below the tip are "Previous" and "Next" navigation buttons.

8

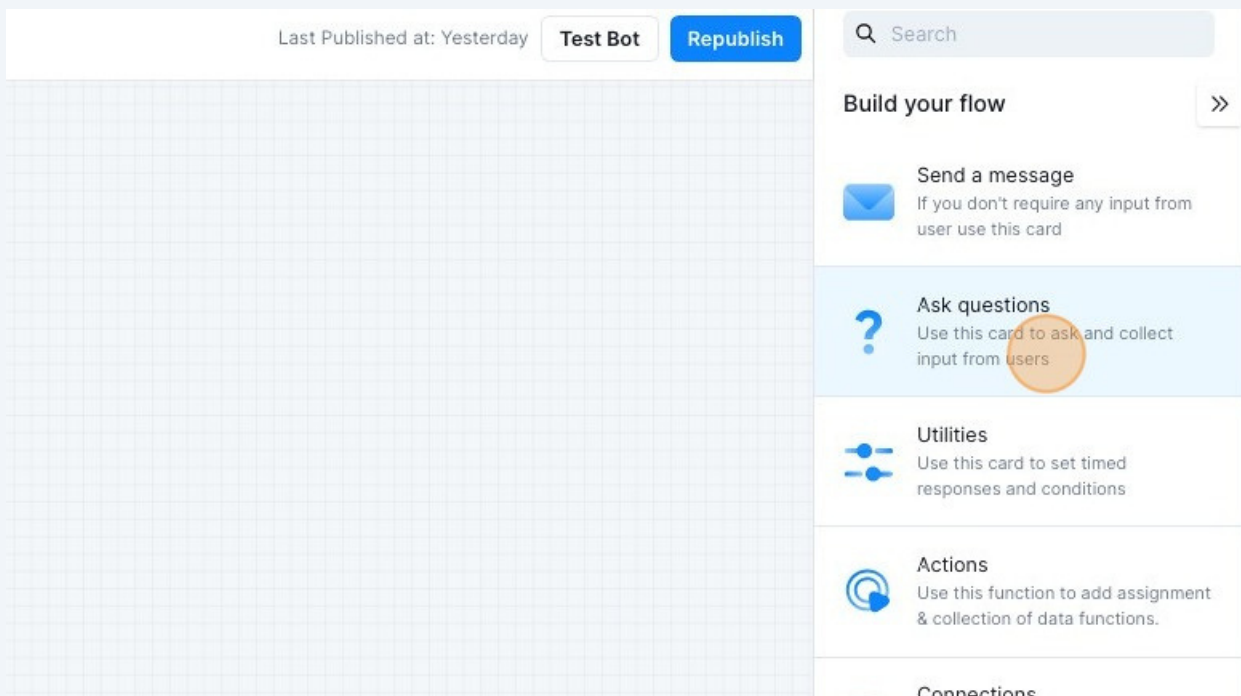
In the keyword section add "*", if you want to trigger the flow irrespective of inputs provided by the user.

9 Lastly Click on "Create".



The screenshot shows the 'Bot Flows' interface. On the left, a dark grey panel displays a folder icon with a sad face and the text 'Bot Flows' and 'You have no flows to view'. On the right, a white panel contains 'Advanced Options' with an 'Add keyword' button, 'Custom Configurations' with a 'Pro tips' section, and 'Cancel' and 'Create' buttons at the bottom right. The 'Create' button is highlighted with an orange circle.

10 Go to Ask Questions Section, to create relevant questions.



The screenshot shows the 'Build your flow' section. At the top, it says 'Last Published at: Yesterday' and has 'Test Bot' and 'Republish' buttons. Below is a large grid area. On the right, a sidebar lists flow building blocks: 'Send a message', 'Ask questions' (highlighted with an orange circle), 'Utilities', 'Actions', and 'Connections'. The 'Ask questions' block is described as 'Use this card to ask and collect input from users'.

11 Click on "Ask Text" to create your first question.

The screenshot shows a chatbot interface with a grid on the left and a menu on the right. The menu is titled "Ask questions" and contains several options: "Ask Text" (highlighted with an orange circle), "Ask Number", "Ask Phone", "Ask Email", and "Ask Date". The "Ask Text" option is described as "Ask anything from the user".

12 Type your question, e.g. "Please Provide us your name?"

The screenshot shows the configuration screen for the "Ask Text" question. The "Question Text" field contains "What do you think?". Below the text field are buttons for "Add variable", "B", "I", and "G". The "Store response in the variable" section is set to "Optional" and has a dropdown menu for "Create or Select variable". A note below states: "Variable name should start with alphabet; Cannot have special characters except underscore (_)". The "Validation Settings" section is collapsed.

13 Click "Create or Select variable"

Ask Text [Learn more](#)

Question Text *

Please provide us your name?

Add variable B I S 28/4096

Store response in the variable Optional ⓘ

Create or Select variable | v

Variable name should start with alphabet; Cannot have special characters except underscore (_)

Validation Settings v

14 Type "prospect_name"

15 You will see "prospect_name" as variable in Dropdown.

Last Published at: Yesterday

← **T Ask Text** [Learn more](#)

Question Text *

Please provide us your name? 28/4096

[Add variable](#) **B** *I* **U**

Store response in the variable **Optional** ⓘ

Create or Select variable .. | v

Variable name should start with alphabet; Cannot have special characters except underscore (_)

Validation Settings v

16 Select it and click on "Save".

gallabox BD Book Demo Last Published at: Yesterday

Home Conversations Contacts Bots Broadcast Sequence Commerce CTWA Integration Analytics Settings Help What's New

← **T Ask Text** [Learn more](#)

Question Text *

Please provide us your name? 28/4096

[Add variable](#) **B** *I* **U**

Store response in the variable **Optional** ⓘ

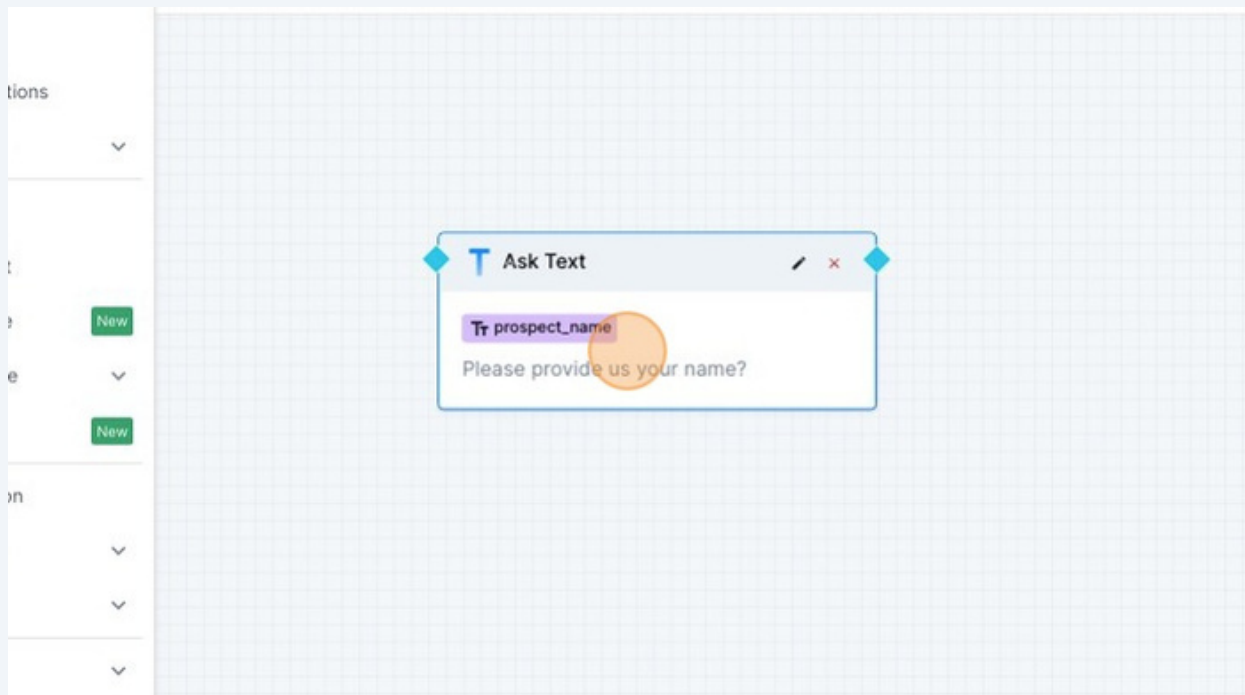
prospect_name x | v

Variable name should start with alphabet; Cannot have special characters except underscore (_)

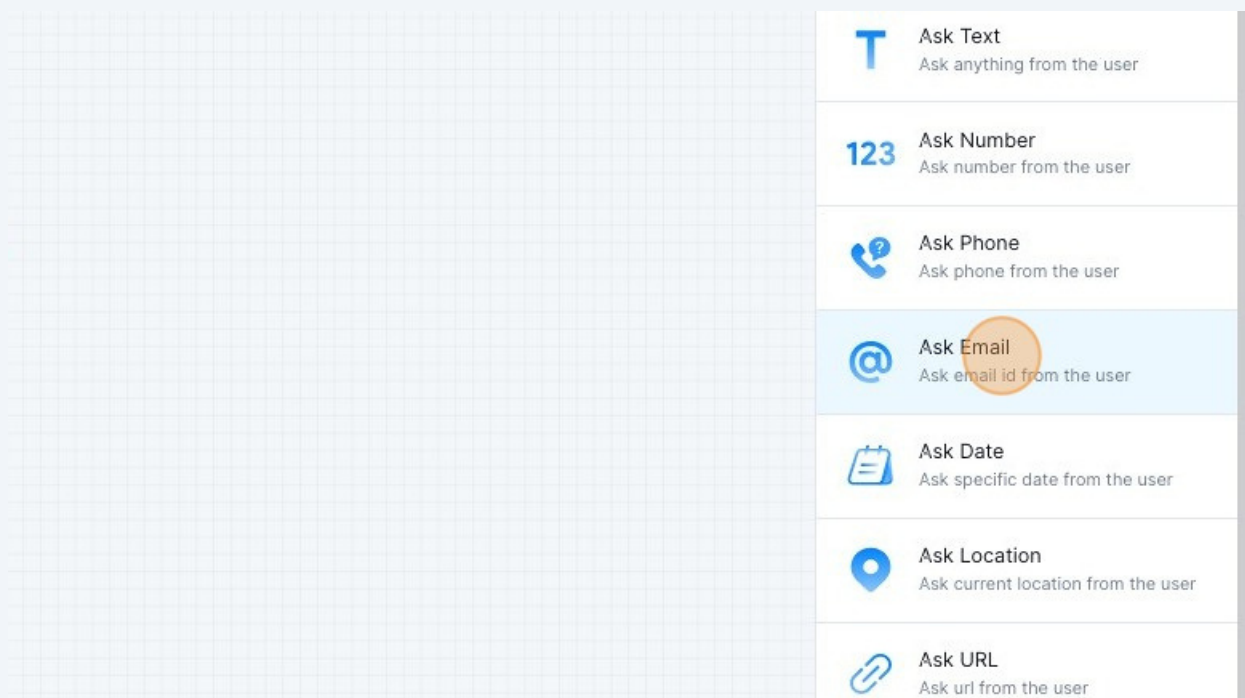
Validation Settings v

Cancel **Save**

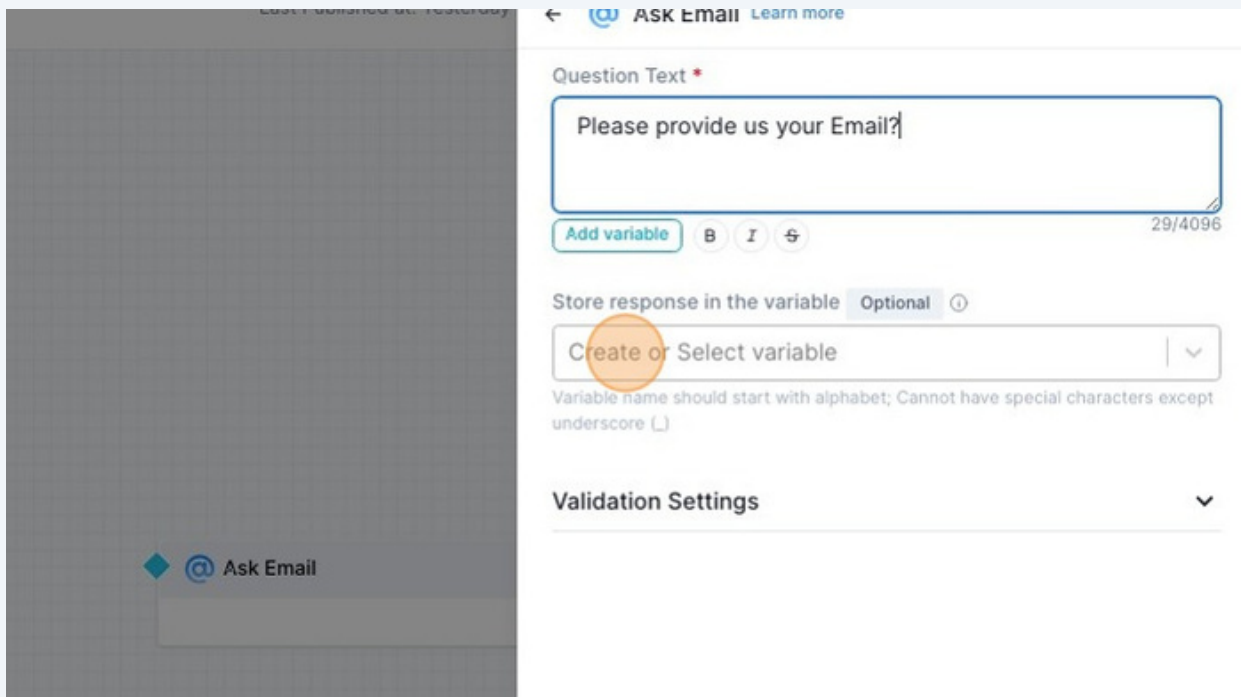
17 You will see the created question like this.



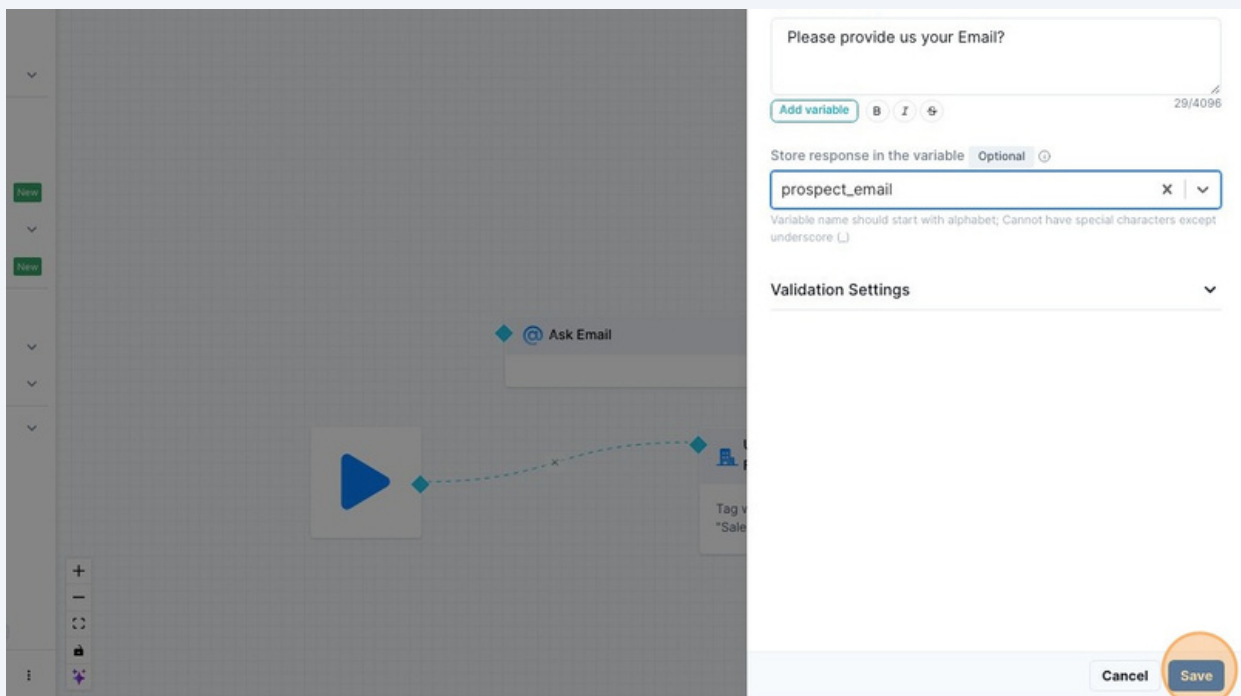
18 To create a Question to ask Email, select "Ask Email".



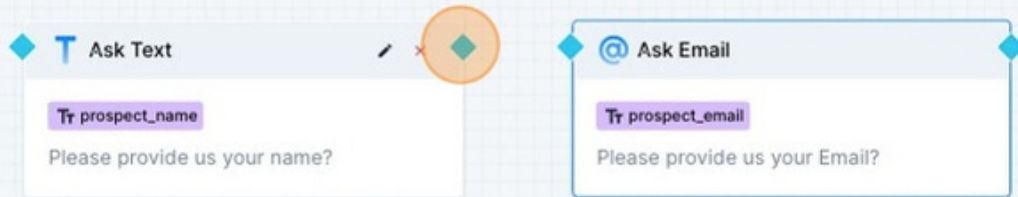
19 Type "Please provide us your Email?"



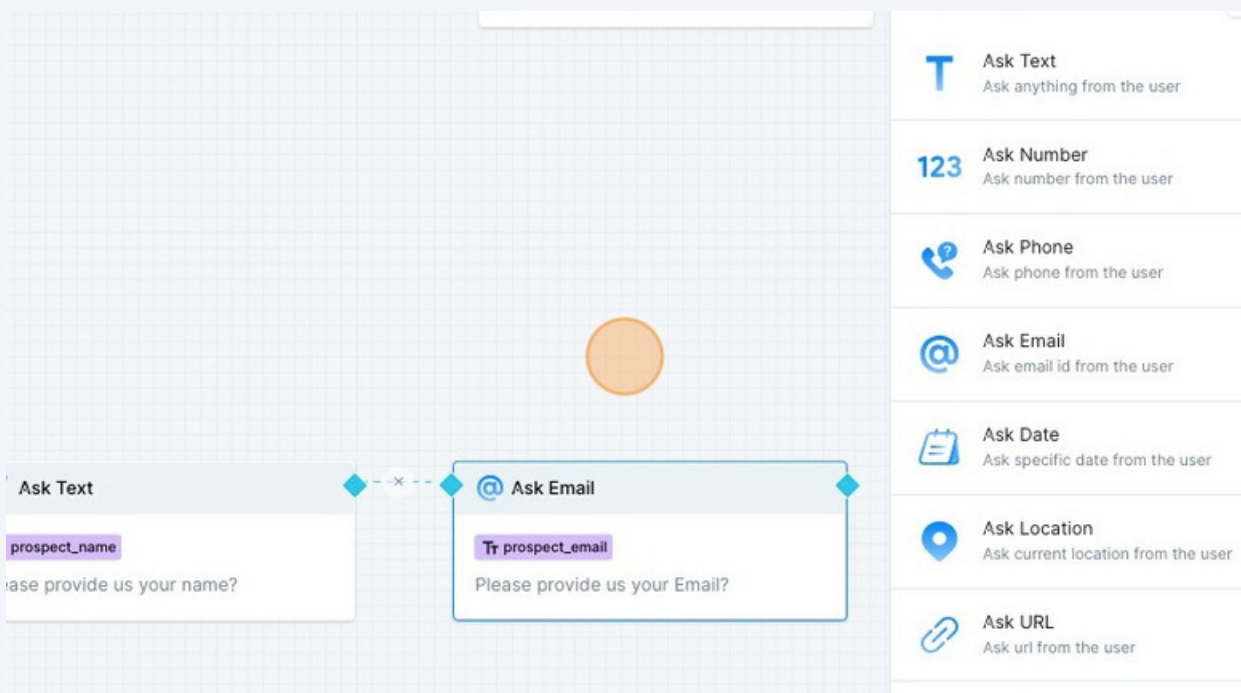
20 In variable section, create another variable as "prospect_email".



21 Connect Both the Nodes.

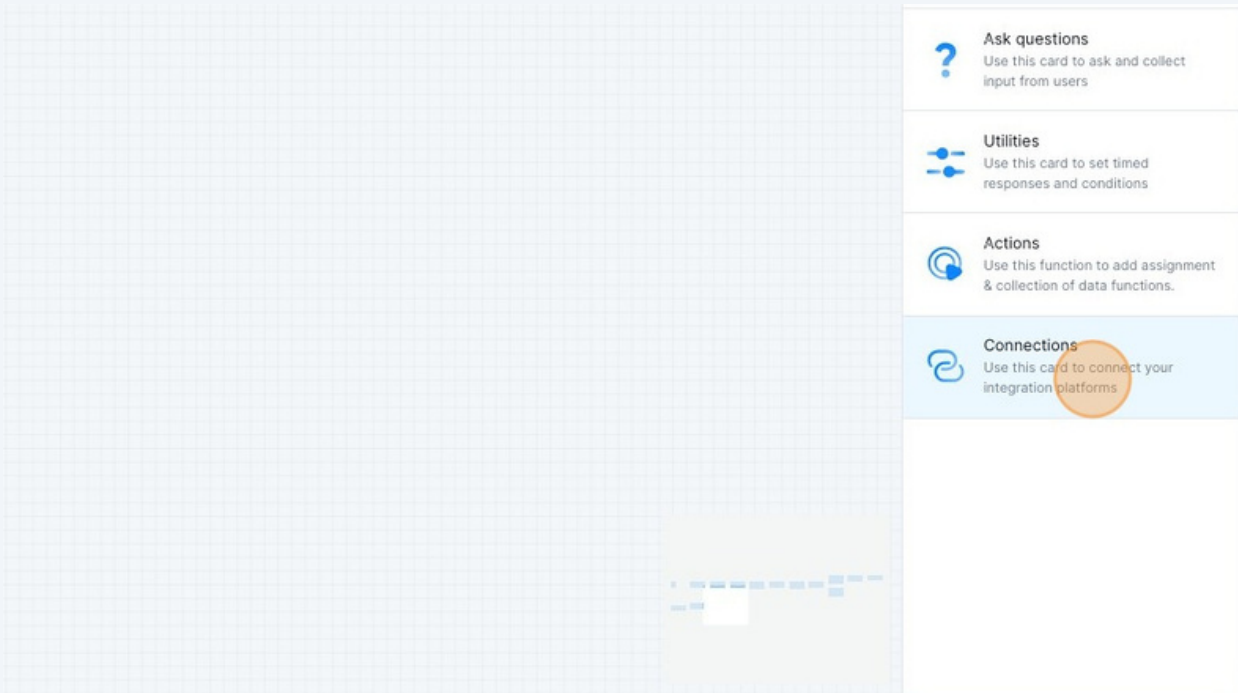


22 After connecting both the nodes, you will see both questions linked with each other.

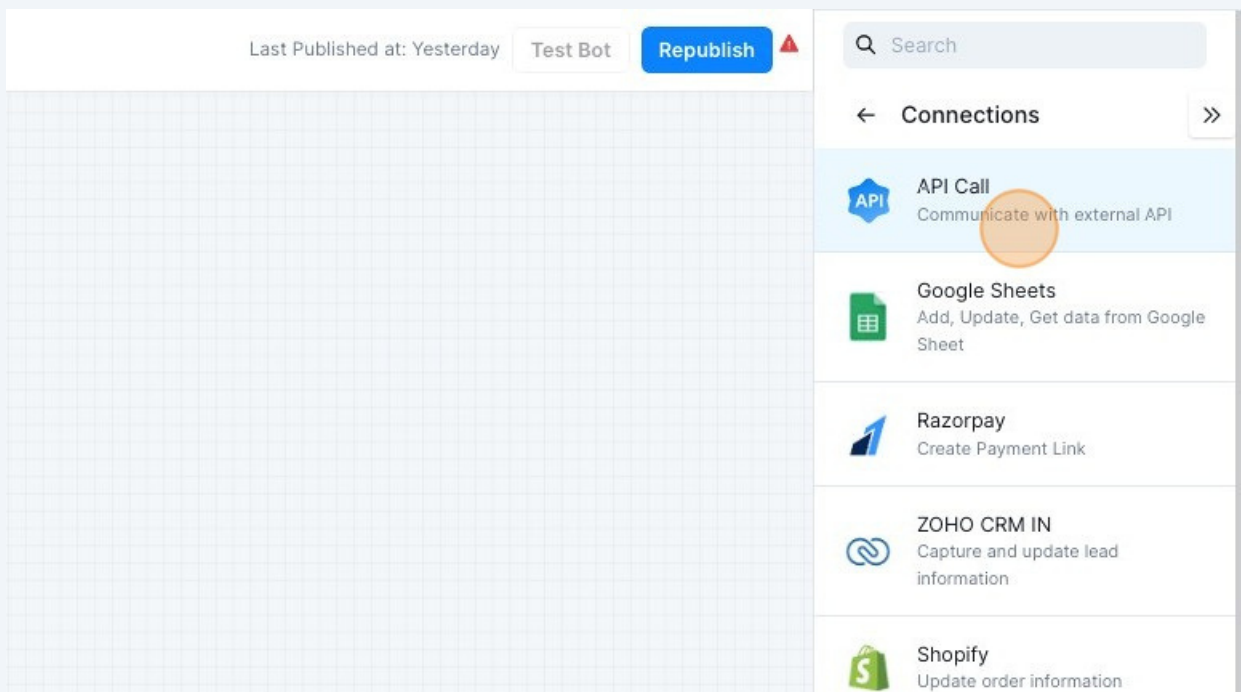


23 In this way, create relevant questions and define variable for each question.

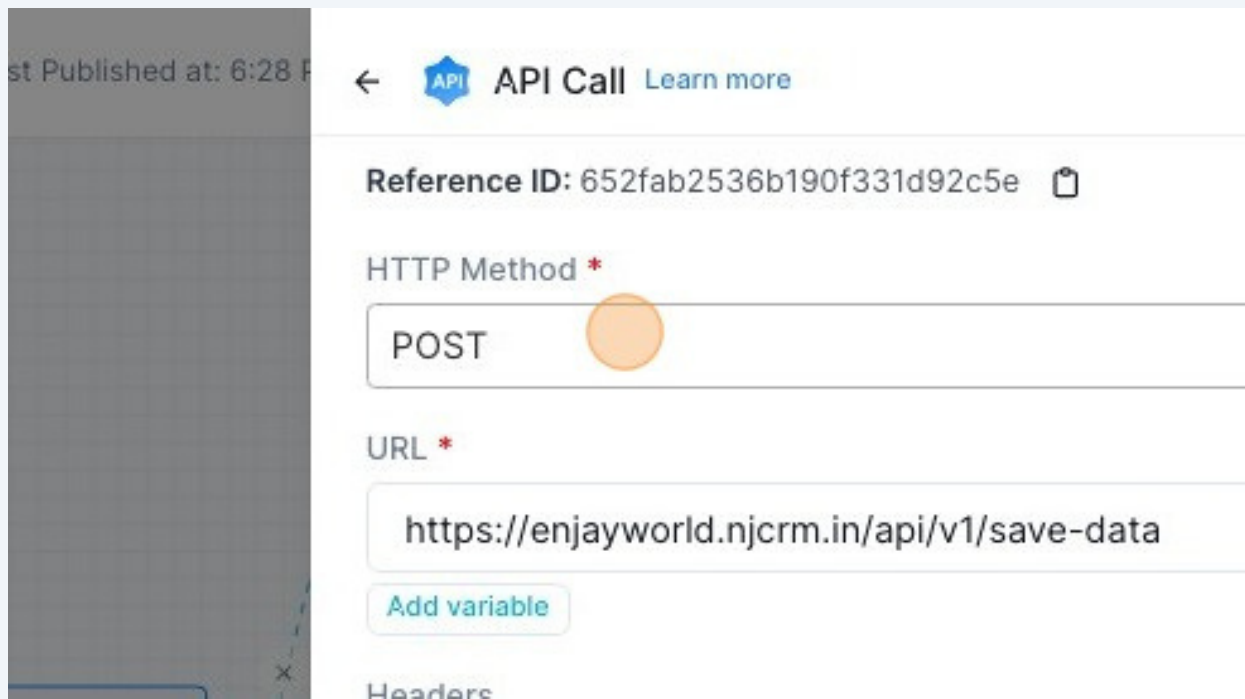
24 From build your flow section, click on "Connections"



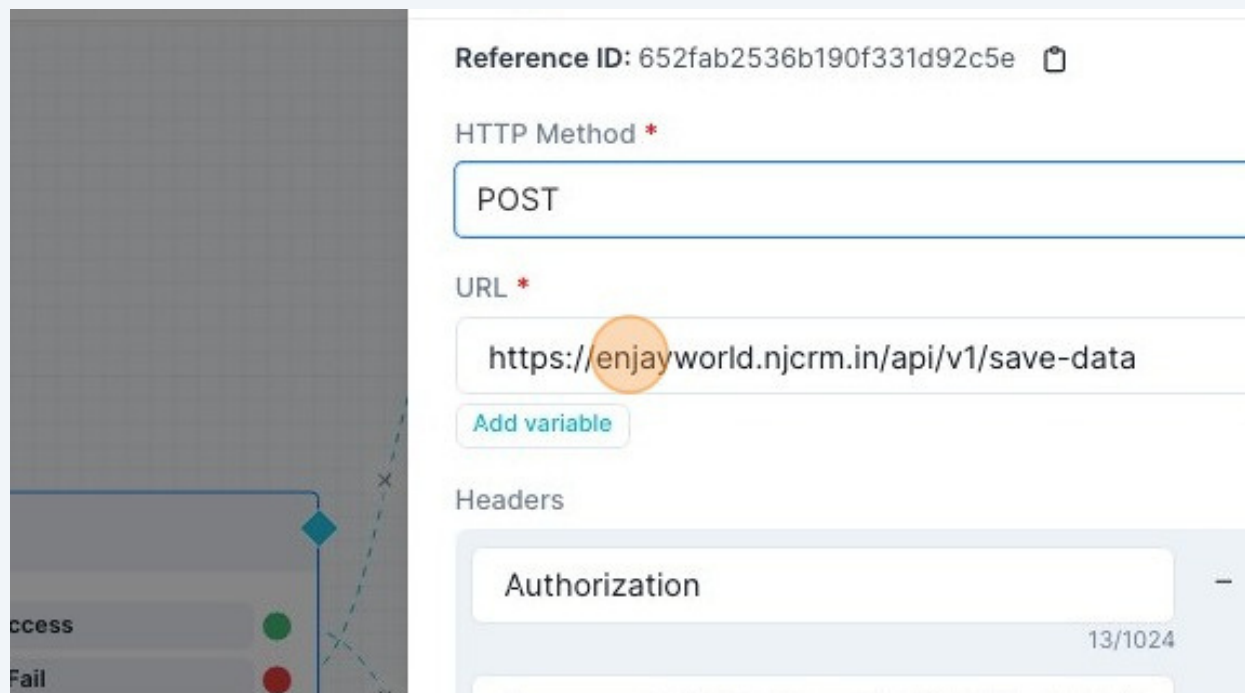
25 Click on "API Call" to create an API call to send data into CRM.



26 In HTTP Method, Set the method as "POST".



27 Replace the "enjayworld.njcrm.in" part from the URL with your CRM URL.



28 Add 3 Headers, "Authorization", "Accept" & "content-type".

URL *

https://enjayworld.njcrm.in/api/v1/save-data 44/1024

Add variable

Headers

Authorization 13/1024

Bearer |aq6u3v2l 39/1024

Add variable

Accept 6/1024

application/json 16/1024

Add variable

29 In Authorization, add following Value, "Bearer + Authorisation Key"

URL *

https://enjayworld.njcrm.in/api/v1/save-data 44/1024

Add variable

Headers

Authorization 13/1024

Bearer aq6u3v2l 39/1024

Add variable

Accept 6/1024

application/json 16/1024

Add variable

content-type 12/1024

30 In Accept, add following Value, "application/json"

The screenshot shows an API configuration interface. On the left, a workflow diagram features an 'API Call' node with 'On Success' and 'On Fail' options. On the right, the configuration details are as follows:

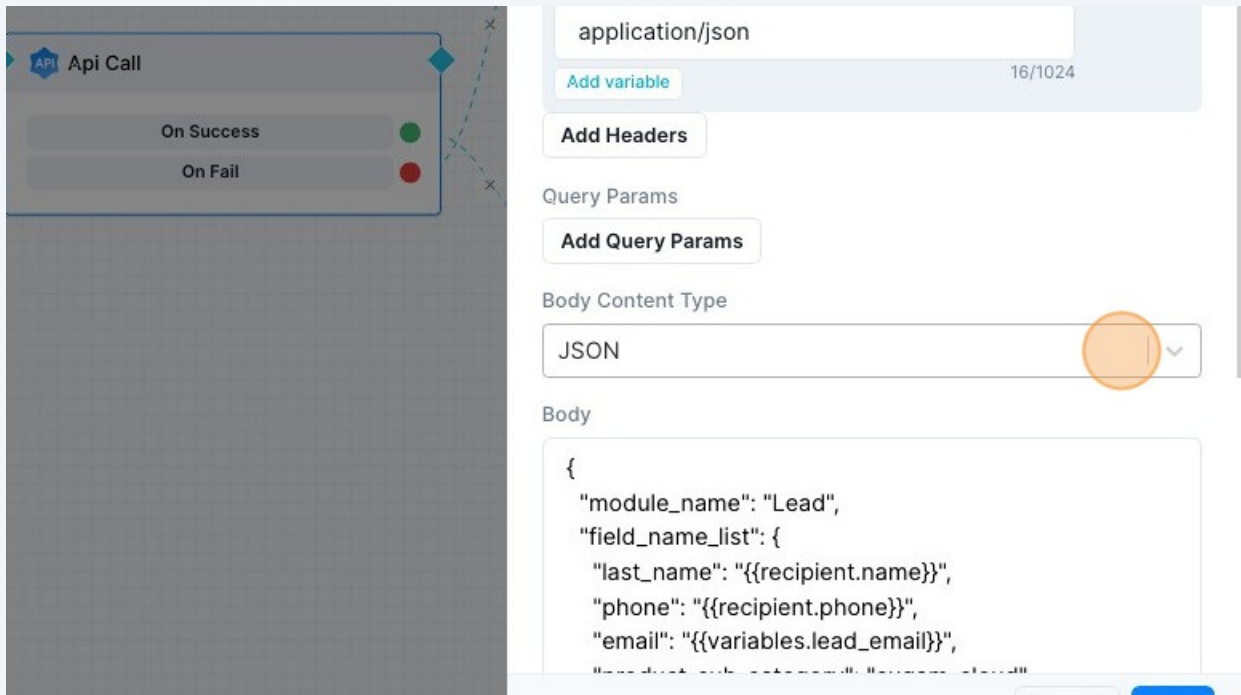
- URL ***: `https://enjayworld.njcrm.in/api/v1/save-data` (44/1024)
- Headers**:
 - Authorization**: `Bearer aq6u3v2ULRbyeXlqKSK3UJwVGQrW` (13/1024)
 - Accept**: `application/json` (6/1024)

31 In content-type, add the following Value, "application/json"

The screenshot shows the same API configuration interface as in step 30, but with an additional header. The configuration details are:

- Method**: POST
- URL ***: `https://enjayworld.njcrm.in/api/v1/save-data` (44/1024)
- Headers**:
 - Authorization**: `Bearer aq6u3v2ULRbyeXlqKSK3UJwVGQrW` (13/1024)
 - Accept**: `application/json` (6/1024)
 - content-type**: `application/json` (12/1024)
 - content-type**: `application/json` (16/1024)

32 In Body Content Type, Select JSON from the drop - down.

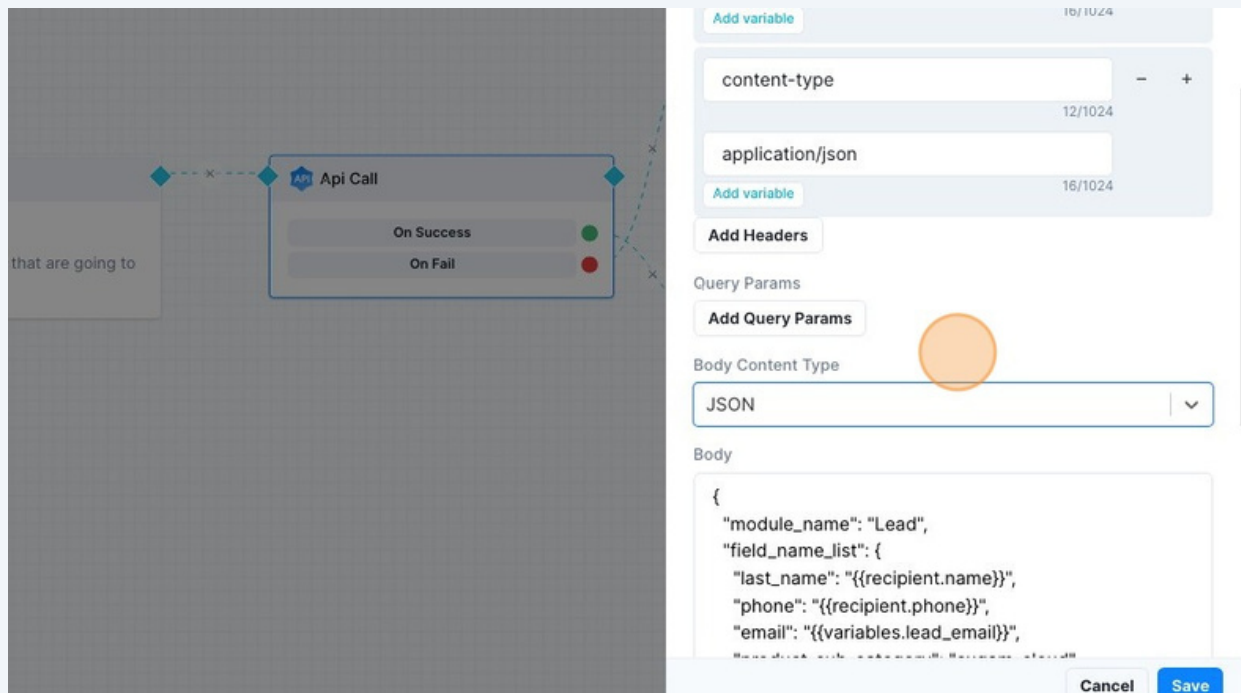


The screenshot shows a configuration window for an API call. On the left, a workflow diagram includes an 'API Call' node with 'On Success' and 'On Fail' options. The main configuration area on the right has the following settings:

- Content type: application/json (16/1024)
- Buttons: Add variable, Add Headers
- Section: Query Params
- Button: Add Query Params
- Body Content Type: JSON (highlighted with an orange circle)
- Body:

```
{
  "module_name": "Lead",
  "field_name_list": {
    "last_name": "{{recipient.name}}",
    "phone": "{{recipient.phone}}",
    "email": "{{variables.lead_email}}",
    "product_subscription": "Business Standard"
  }
}
```

33 Click on Body Section to add a small code.



This screenshot shows the same API configuration window as in step 32. The 'Body' section is highlighted with an orange circle, indicating it is the target for the next step. The configuration details are:

- Content type: application/json (16/1024)
- Buttons: Add variable, Add Headers
- Section: Query Params
- Button: Add Query Params
- Body Content Type: JSON
- Body:

```
{
  "module_name": "Lead",
  "field_name_list": {
    "last_name": "{{recipient.name}}",
    "phone": "{{recipient.phone}}",
    "email": "{{variables.lead_email}}",
    "product_subscription": "Business Standard"
  }
}
```
- Buttons: Cancel, Save


```

{
  "module_name": "Lead",
  "field_name_list": {
    "last_name": "{{prospect_name}}",
    "phone": "{{recipient.phone}}",
    "email": "{{prospect_email}}",
    "product_sub_category": "{{Mention Product Name Here}}",
    "account_id": "{{prospect_company_name}}",
    "lead_source": "{{Mention Lead Source Here}}",
    "assigned_user_id": "{{Mention CRM User ID Here}}",
    "next_followup_type": "{{Set Followup Type Here}}"
  },
  "related_models":
  [
    {
      "contact_lead":
      [
        {
          "attach":
          [
            {
              "email": "{{variables.lead_email}}",
              "phone": "{{recipient.formattedPhone.phoneNumber}}"
            }
          ],
          "data": []
        }
      ]
    }
  ]
}

```

35 Lastly Click on "Done"

```
    {{variables.lead_email}},  
    "sub_category": "sugam_cloud",  
    "id": "{{variables.company_name}}",  
    "source": "GallaboxCTWA",  
    "user_id": "f97ebcbd-da92-47d1-bc8a-c2b4c3b6aa08",  
    "followup_type": "Demo",  
    "content": "{{variables.description_1.title}} >>  
    {{variables.description_2.title}} >> {{variables.description_3.title}}  
    {{variables.description_4.title}}"
```

Cancel Done

```
    "followup_type": "Demo",  
    "content": "{{variables.description_1.title}} >> {{va  
    },  
    "related_models": [  
      {  
        "contact_lead": [  
          {  
            "attach": [  
              {  
                "email": "{{variables.lead_email}}",  
                "phone": "{{recipient formattedPhone phoneNum"
```

36 Click "Save"

API Call

On Success ●

On Fail ●

```
}  
]  
}
```

Test Values

Add Test Values

Send Sample Request

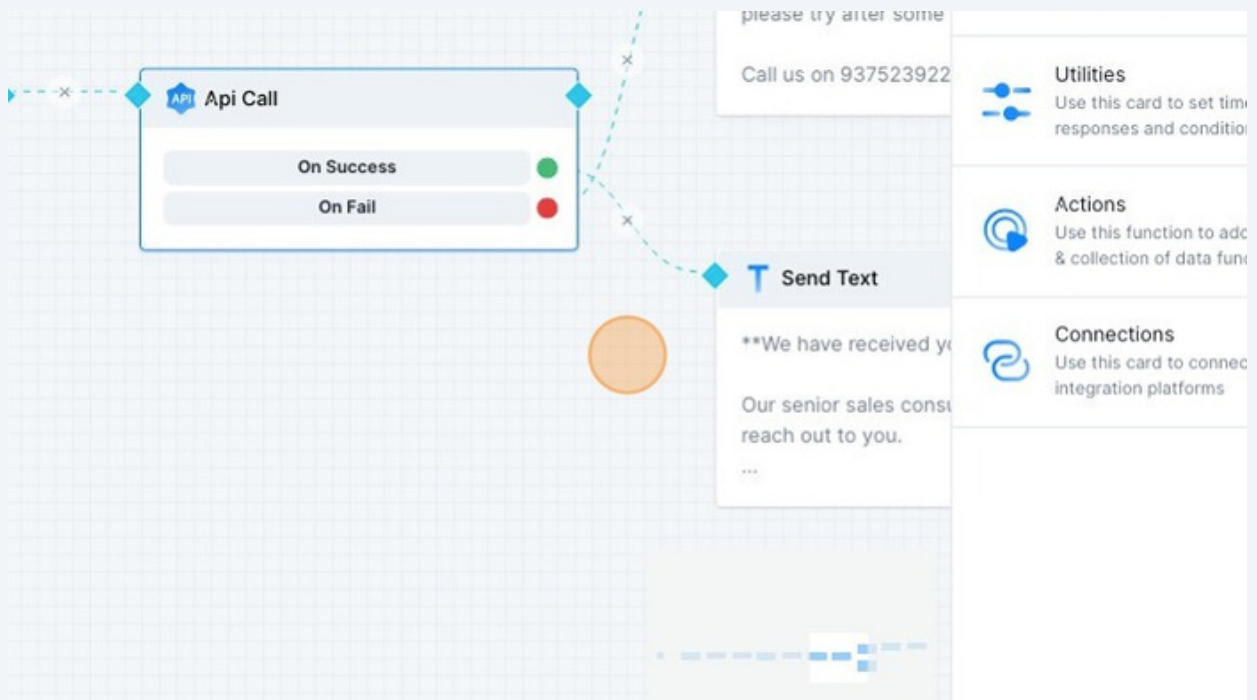
Response from API

Store response in variables [Learn more](#)

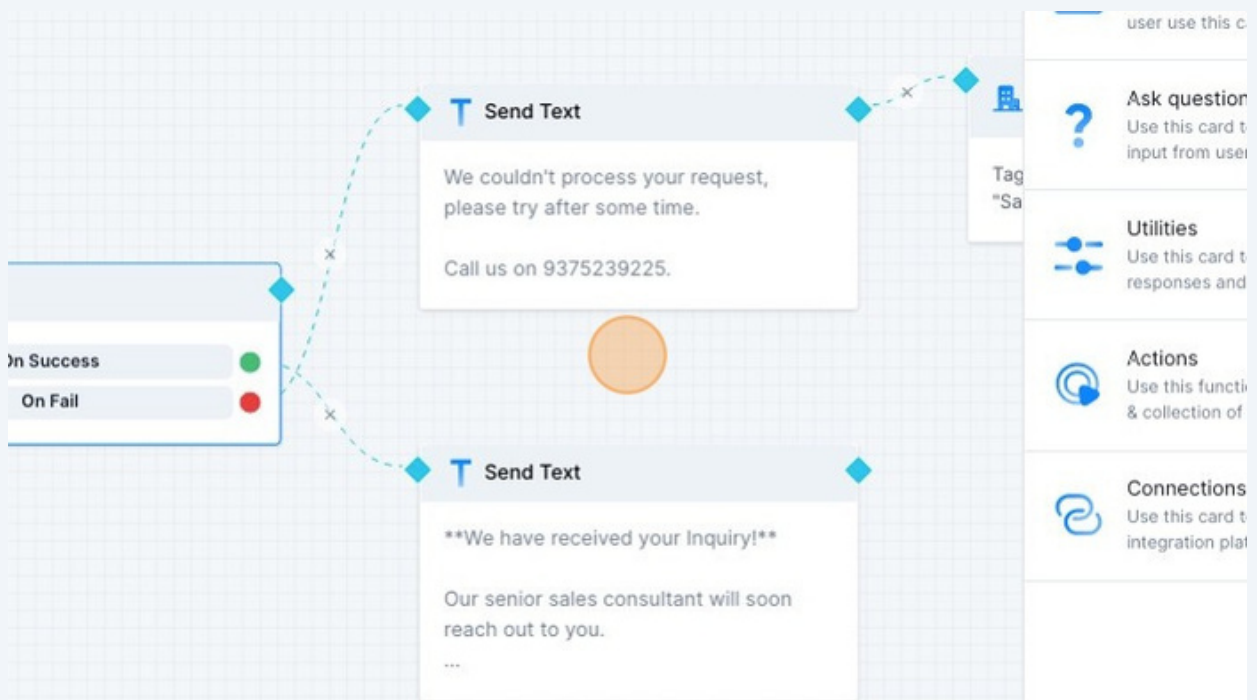
Add Variable

Cancel Save

37 You can create two different messages, on API Success & on API Failure.



38 Click here.



39 Once done, click to "Publish" or "Republish" your flow.

The screenshot displays a flow builder interface. At the top, it shows 'Last Published at: 6:28 PM' and 'Test Bot'. A blue 'Republish' button with a red warning triangle is highlighted with an orange circle. Below this is a grid workspace containing a flow diagram. The flow starts with a 'Send Text' card (partially visible) containing the text: 'I didn't process your request, try after some time.' followed by a phone number 'on 9375239225.'. This is connected to an 'Update Conversation Fields' card, which has a sub-card indicating 'Tag will be appended with "SalesBotCompleted"'. To the right is a sidebar titled 'Build your flow' with a search bar and several categories: 'Send a message', 'Ask questions', 'Utilities', and 'Actions', each with a brief description and an icon.