

Hatch Assistant

Setup guide



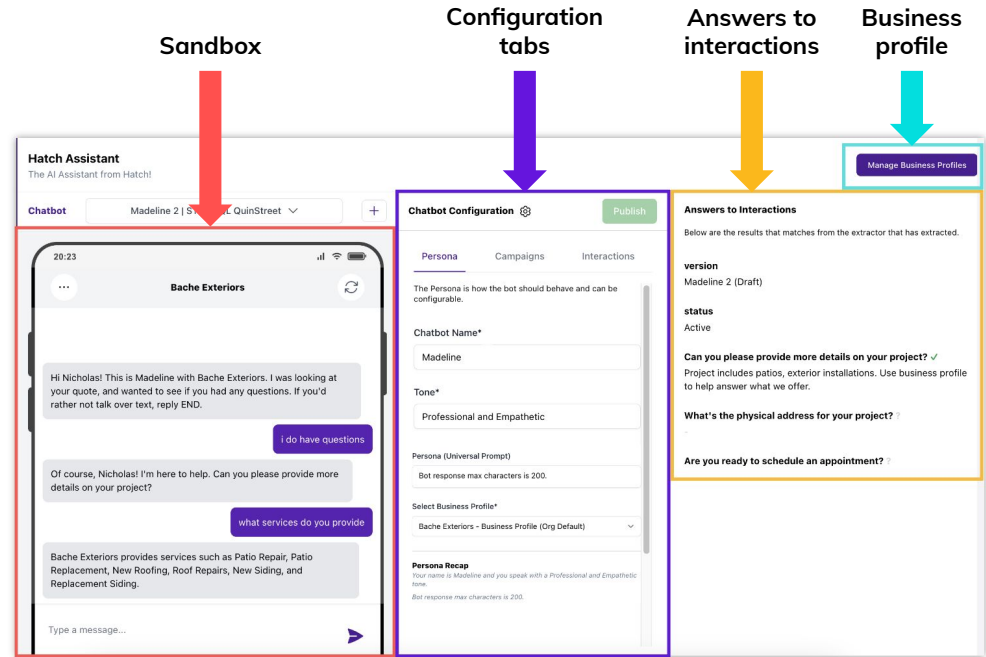
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Dashboard

Your Hatch Assistant dashboard has four main areas:

1. **Sandbox:** This is your testing environment.
2. **Chatbot Configuration tabs:** This is where you set up your bot's Persona, Campaign, Interactions, Rules, and Tools.
3. **Answers to interactions:** This extracts the information from the conversation that you're having the bot collect. We'll cover this in the Testing Your Bot section as well.
4. **Business profile:** This is where you manage your business profile.



Business Profile

The screenshot displays the Hatch Assistant interface, which is used for configuring and managing chatbots. The interface is divided into several sections:

- Header:** "Hatch Assistant" with the subtitle "The AI Assistant from Hatch!".
- Chatbot Selection:** A dropdown menu showing "Madeline 2 | STL - PQL QuinStreet" and a "+" button to add more chatbots.
- Chatbot Configuration:** A section with a "Publish" button and tabs for "Persona", "Campaigns", and "Interactions".
 - Persona:** A section for defining the chatbot's personality, including a "Chatbot Name*" (Madeline), "Tone*" (Professional and Empathetic), and "Select Business Profile*" (Bache Exteriors - Business Profile (Org Default)).
 - Persona Recap:** A summary of the configured persona, stating "Your name is Madeline and you speak with a Professional and Empathetic tone." and "Bot response max characters is 200."
- Answers to Interactions:** A section showing the results of the extractor that has extracted information from the chatbot's responses. It includes a "version" (Madeline 2 (Draft)), "status" (Active), and several prompts for more details, such as "Can you please provide more details on your project?" and "What's the physical address for your project?".

A red box highlights the "Manage Business Profiles" button in the top right corner of the interface.

Chatbot Conversation:

20:23 **Bache Exteriors**

Hi Nicholas! This is Madeline with Bache Exteriors. I was looking at your quote, and wanted to see if you had any questions. If you'd rather not talk over text, reply END.

i do have questions

Of course, Nicholas! I'm here to help. Can you please provide more details on your project?

what services do you provide

Bache Exteriors provides services such as Patio Repair, Patio Replacement, New Roofing, Roof Repairs, New Siding, and Replacement Siding.

Type a message...

About your business profile

While you'll train your bot with a specific set of questions to ask the customer, customers can also ask your bot questions. The bot will use the information in your business profile to answer them.

For example:

- Do you offer window repairs or just replacements?
- What hours are you open?

Business Name

Business Category

Business Description

Business Hours

Website

Physical Location

Service Area

Services

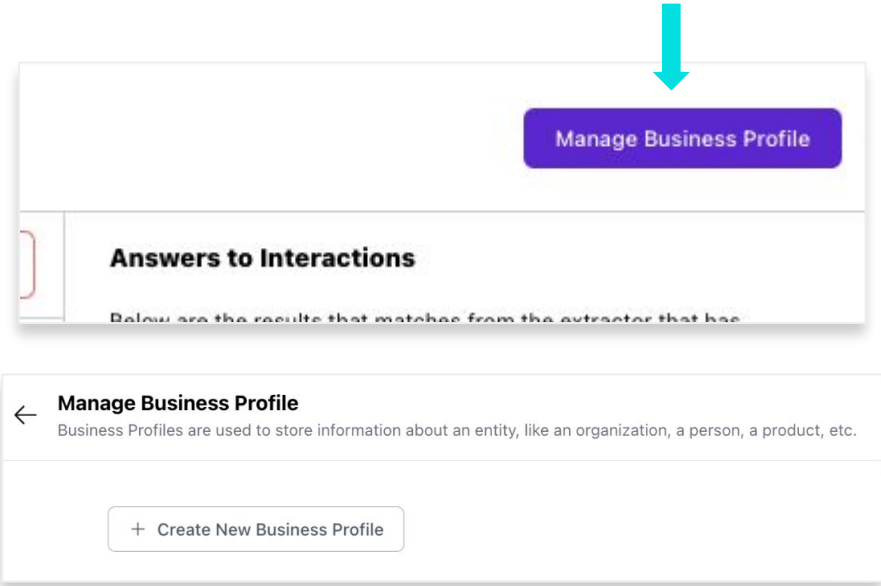
Products

Phone Number

Create new property

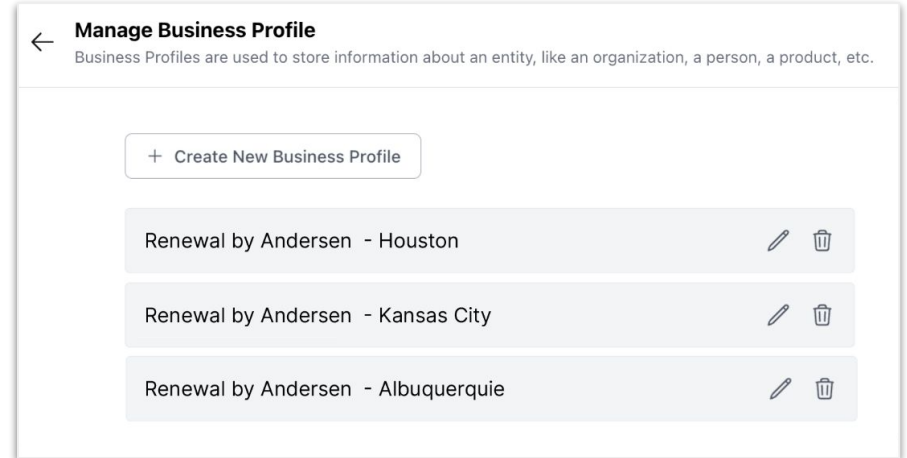
How to create your business profile:

1. On the top right, click “Manage Business Profile”
2. Click “Create New Business Profile”



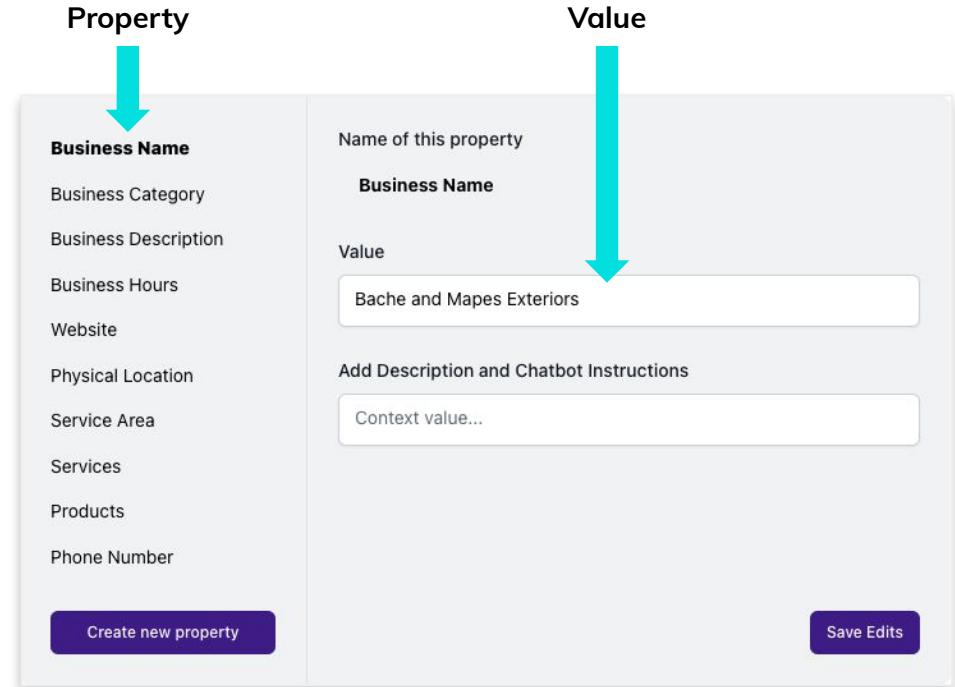
Notes

- If you have multiple locations, create a unique profile for each location.
- You can come back to this screen to edit or delete a business profile at any time



3. Fill in your information

- **Property:** Each of the 10 components of your business profile (Business Name, Business Category, Business Description, Business Hours, etc.)
- **Value:** This is what information you'll fill in for each property.
- **Description and Chatbot Instructions:** Add any additional details here. Sometimes you'll leave this section blank



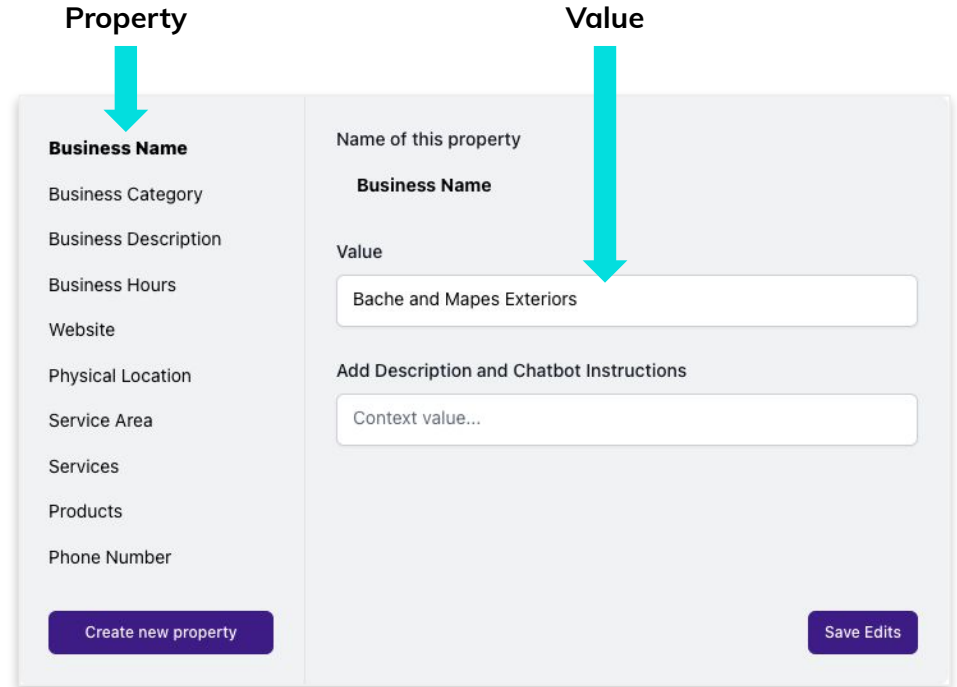
The screenshot displays the Hatch Business Profile form. On the left, a vertical list of property types is shown, with a cyan arrow pointing to 'Business Name'. On the right, the form fields are visible, with a cyan arrow pointing to the 'Value' input field. The 'Value' field contains the text 'Bache and Mapes Exteriors'. Below the 'Value' field is the 'Add Description and Chatbot Instructions' section, which contains a text area with the placeholder 'Context value...'. At the bottom of the form, there are two buttons: 'Create new property' and 'Save Edits'.

Property	Value
Business Name	Name of this property
Business Category	Business Name
Business Description	Value
Business Hours	Bache and Mapes Exteriors
Website	Add Description and Chatbot Instructions
Physical Location	Context value...
Service Area	
Services	
Products	
Phone Number	

Buttons: Create new property, Save Edits

Example

- **Property:** Business Name
- **Value:** Bache Exteriors
- **Chatbot instructions:** (Leave empty)

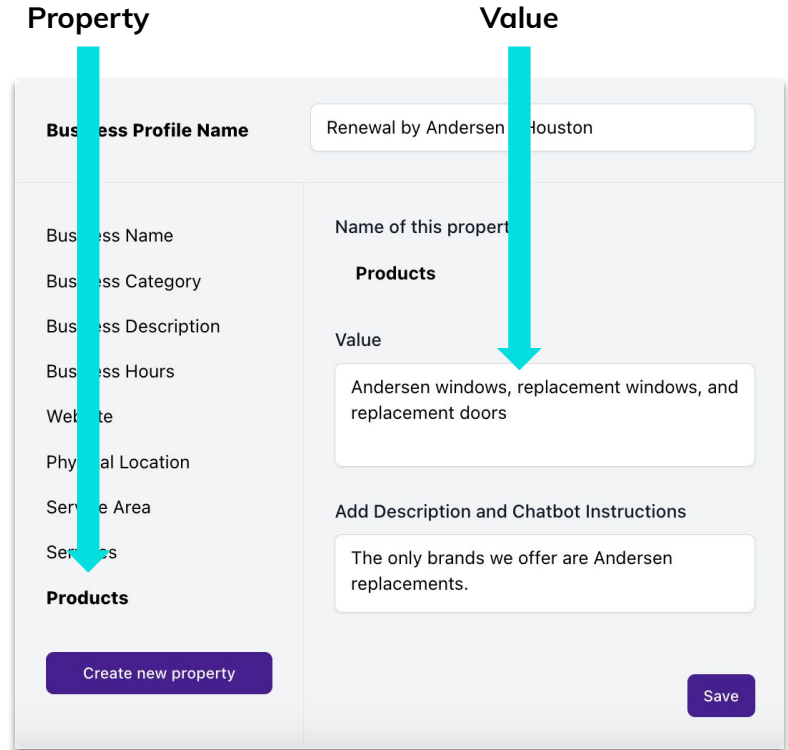


The screenshot shows a two-column form for creating a business profile. The left column is labeled 'Property' and the right column is labeled 'Value'. A red arrow points from the 'Property' label to the 'Business Name' field in the left column. Another red arrow points from the 'Value' label to the 'Value' input field in the right column, which contains the text 'Bache and Mapes Exteriors'. The right column also has a section for 'Add Description and Chatbot Instructions' with an empty input field. At the bottom of each column are buttons: 'Create new property' on the left and 'Save Edits' on the right.

Property	Value
Business Name	Name of this property
Business Category	Business Name
Business Description	Value
Business Hours	<input type="text" value="Bache and Mapes Exteriors"/>
Website	Add Description and Chatbot Instructions
Physical Location	<input type="text" value="Context value..."/>
Service Area	
Services	
Products	
Phone Number	
<input type="button" value="Create new property"/>	<input type="button" value="Save Edits"/>

Example

- **Property:** Products
- **Value:** Andersen windows, replacement windows, and replacement doors
- **Chatbot Instructions:** The only brands we offer are Andersen replacements.



The screenshot shows a form for creating a business profile. On the left, a vertical cyan arrow labeled "Property" points to the "Products" section. On the right, a vertical cyan arrow labeled "Value" points to the "Value" field. The form includes a "Business Profile Name" field with the text "Renewal by Andersen Houston", a "Name of this property" field with the text "Products", a "Value" field with the text "Andersen windows, replacement windows, and replacement doors", and an "Add Description and Chatbot Instructions" field with the text "The only brands we offer are Andersen replacements." There are "Create new property" and "Save" buttons at the bottom.

Property	Value
Business Profile Name	Renewal by Andersen Houston
Business Name	Name of this property
Business Category	Products
Business Description	Value
Business Hours	Andersen windows, replacement windows, and replacement doors
Website	
Physical Location	
Service Area	
Services	
Products	Add Description and Chatbot Instructions
	The only brands we offer are Andersen replacements.

Bot Creation

Hatch Assistant
The AI Assistant from Hatch!

Chatbot Madeline 2 | STL - PQL QuinStreet

Chatbot Configuration Publish

Persona Campaigns Interactions

The Persona is how the bot should behave and can be configurable.

Chatbot Name*
Madeline

Tone*
Professional and Empathetic

Persona (Universal Prompt)
Bot response max characters is 200.

Select Business Profile*
Bache Exteriors - Business Profile (Org Default)

Persona Recap
Your name is Madeline and you speak with a Professional and Empathetic tone.
Bot response max characters is 200.

Answers to Interactions
Below are the results that matches from the extractor that has extracted.

version
Madeline 2 (Draft)

status
Active

Can you please provide more details on your project? ✓
Project includes patios, exterior installations. Use business profile to help answer what we offer.

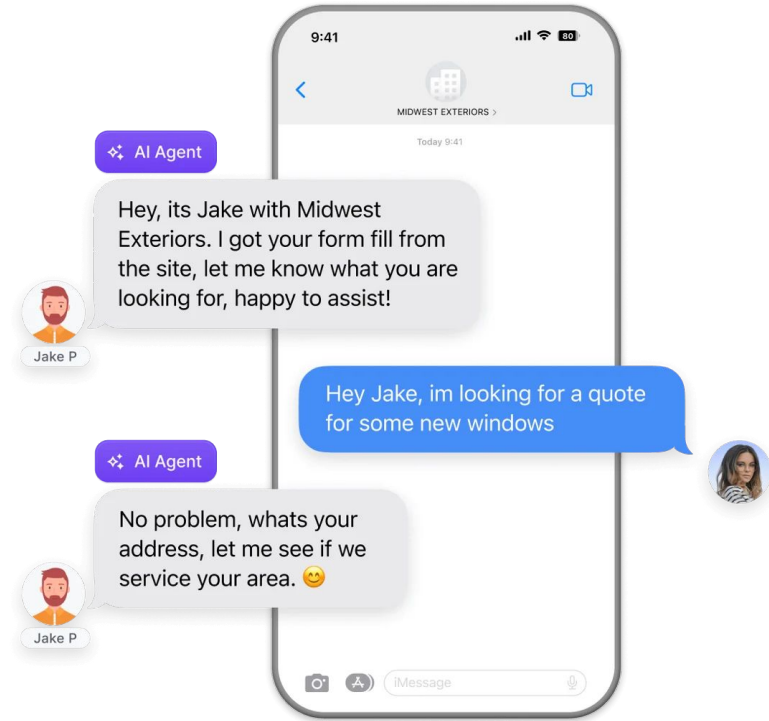
What's the physical address for your project? ?
-

Are you ready to schedule an appointment? ?
-

Chat Preview:
20:23
Bache Exteriors
Hi Nicholas! This is Madeline with Bache Exteriors. I was looking at your quote, and wanted to see if you had any questions. If you'd rather not talk over text, reply END.
I do have questions
Of course, Nicholas! I'm here to help. Can you please provide more details on your project?
what services do you provide
Bache Exteriors provides services such as Patio Repair, Patio Replacement, New Roofing, Roof Repairs, New Siding, and Replacement Siding.
Type a message...

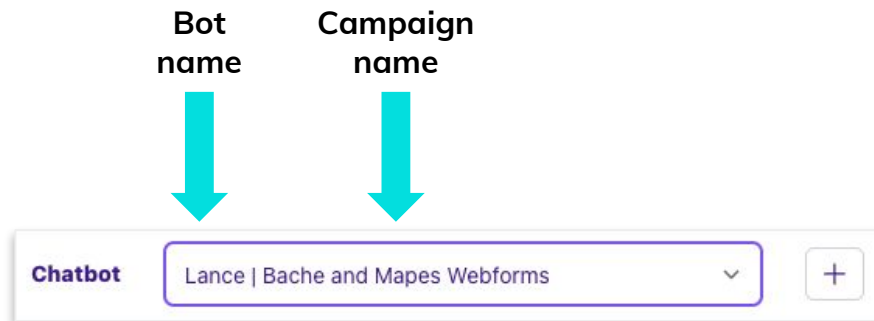
About bots

- Bots converse with customers over text.
- They each have a name, a personality, and an associated Hatch Campaign.
- You will give them a set of questions to ask / information to gather.
- Unlike traditional chatbots where you have to program responses, you just have to give your bot general instructions and it will come up with its own responses.
- You can also have it follow exact scripts.



How to create a new bot:

1. Navigate to the Chatbot dropdown

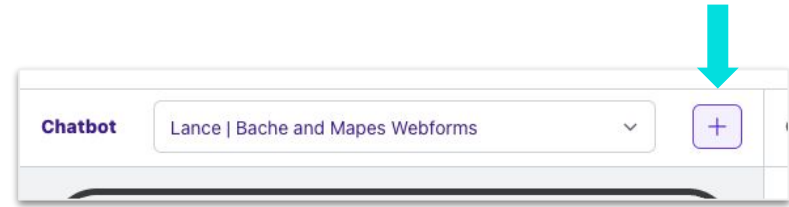


Notes:

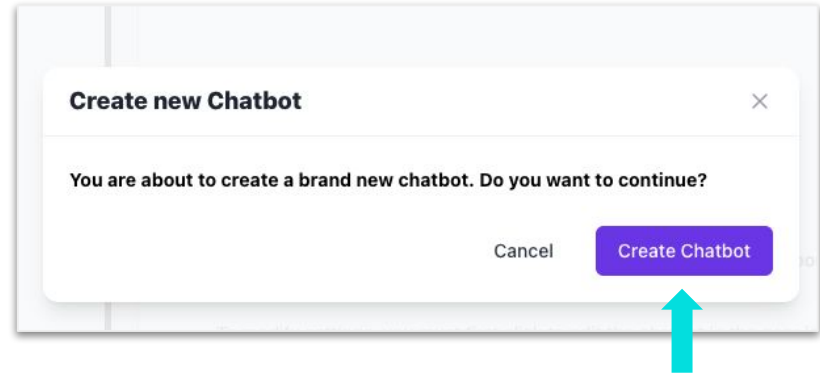
- This will show you your current bots and the Hatch campaign they're assigned to in the form of Name | Campaign.
- If you haven't created a bot yet, you will see Default Chatbot | No Campaign. You can change this later.



2. Hit the Plus button



3. Hit "Create Chatbot"



Bot Configuration

Persona Tab

The screenshot displays the Hatch Assistant configuration interface. On the left, a chat preview window shows a conversation with a customer named Nicholas. The chatbot, Madeline 2, provides information about Bache Exteriors services. On the right, the 'Chatbot Configuration' panel is open to the 'Persona' tab. This tab allows users to define the chatbot's personality and behavior. The configuration includes fields for the chatbot's name, tone, and a universal prompt. A checkbox is checked to restrict the chatbot from discussing appointment days and times. A 'Person Recap' section summarizes the configuration. To the right of the configuration panel, the 'Answers to Interactions' section shows the results of the extractor for the chatbot's responses.

Hatch Assistant
The AI Assistant from Hatch!

Chatbot Madeline 2 | STL - PQL QuinStreet

Chatbot Configuration Publish

Persona Campaigns Interactions Rules

The Persona is how the bot should behave and can be configurable.

Chatbot Name*
Madeline 2

Tone*
Professional and Empathetic

Persona (Universal Prompt)
Max response is 150 characters. If customer asks questions outside of interaction, proceed to respond and ask interaction question using AI.

Select Business Profile*
Bache Exteriors - Business Profile (Org Default)

Restrict Chatbot from Discussing Appointment Days and Times

Person Recap
Your name is Madeline 2 and you speak with a Professional and

Answers to Interactions
Below are the results that matches from the extractor that has extracted.

version
Madeline 2 (Draft)

status
Active

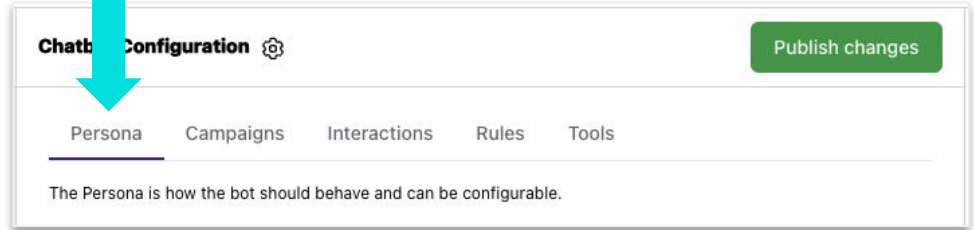
Can you please provide more details on your project? ✓
Project includes patios, exterior installations. Use business profile to help answer what we offer.

What's the physical address for your project?

Are you ready to schedule an appointment? ✓

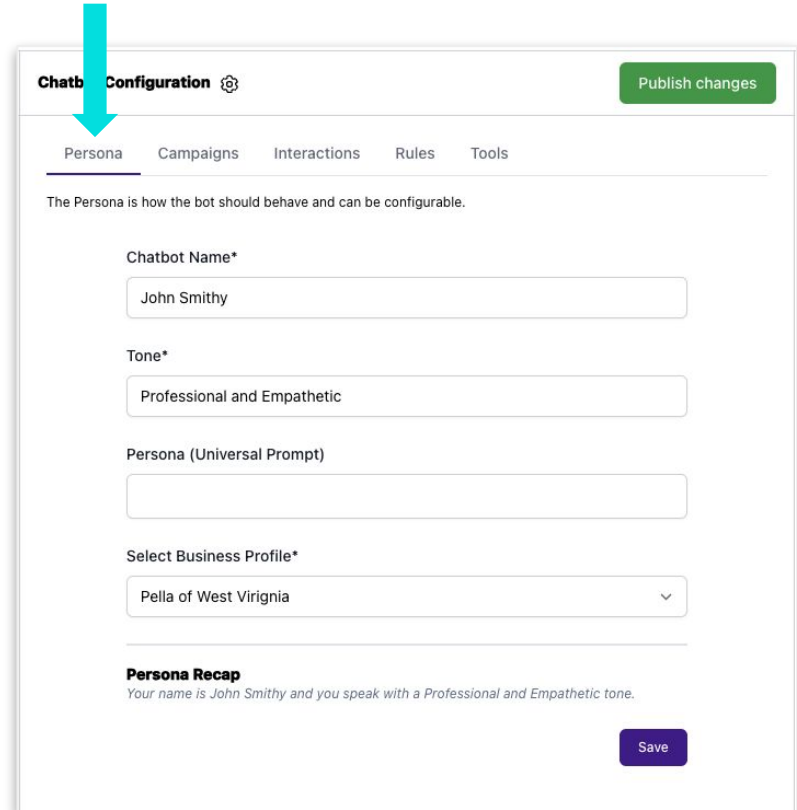
About Personas


This is the way the bot will behave, request, and deliver information.



How to configure your Persona

- **Name:** Use a real person's name
- **Tone:** This is the tone in which the bot will converse with customers. Use popular tones, like professional or empathetic, or combine them.
- **Persona Prompt:** You can use this for quick instructions or leave it empty.
- **Business Profile:** Pick which Profile or Location this bot will use to answer customer questions.



Chatbot Configuration  Publish changes

Persona Campaigns Interactions Rules Tools

The Persona is how the bot should behave and can be configurable.

Chatbot Name*

Tone*

Persona (Universal Prompt)

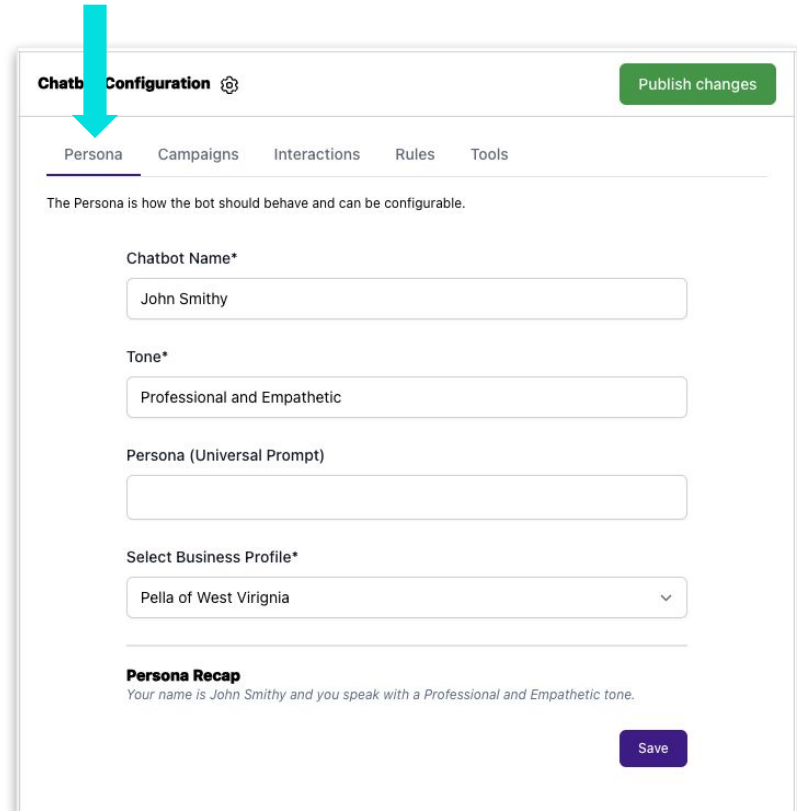
Select Business Profile*


Persona Recap
Your name is John Smithy and you speak with a Professional and Empathetic tone.

Save

Example

- **Name:** Jane Johnson
- **Tone:** Professional and Witty
- **Universal Prompt:** (empty)
- **Business Profile:** Pella of West Virginia



Chatbot Configuration  Publish changes

Persona Campaigns Interactions Rules Tools

The Persona is how the bot should behave and can be configurable.

Chatbot Name*

Tone*

Persona (Universal Prompt)

Select Business Profile*

Persona Recap
Your name is John Smithy and you speak with a Professional and Empathetic tone.

Save

Tone examples:

- Professional
- Witty
- Friendly
- Empathetic
- Funny
- You can combine tones, i.e. “Professional and Empathetic”

Persona prompt examples:

- Max response is 150 characters
- Everything you say rhymes
- You talk like Chris Rock

Bot Configuration

Campaigns Tab

Hatch Assistant
The AI Assistant from Hatch

Chatbot: Madeline 2 | STL - PQL QuinStreet

Chatbot Configuration Publish

Persona | **Campaigns** | Interactions | Rules | Tools

This is where you can assign a campaign to the chatbot and also customize the first message of the conversation to simulate a campaign interaction.

Campaign
STL - PQL QuinStreet | Sales Follow Up

Below is the first message in the campaign (used for testing)
Template: [Contact First Name], it's [User First Name] with [Details Company Name]. I got your information from the form you submitted. Please let us know what services you are looking to have done. If you'd rather not talk over text, reply END.

Hi Nicholas! This is Madeline with Bache Exteriors. I was looking at your quote, and wanted to see if you had any questions. If you'd rather not talk over text, reply END.

Answers to Interactions
Below are the results that matches from the extractor that has extracted.

version
Madeline 2 (Draft)

status
Active

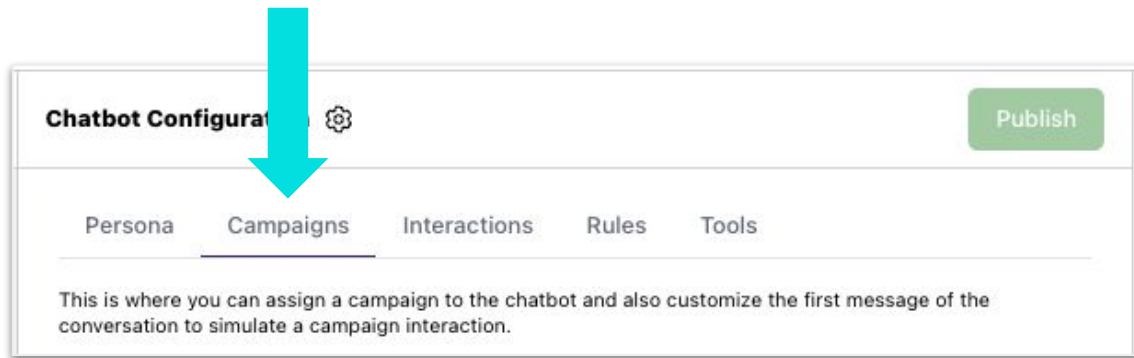
Can you please provide more details on your project?
✓ Project includes patios, exterior installations. Use business profile to help answer what we offer.

What's the physical address for your project?
-

Are you ready to schedule an appointment?
-

About the Campaigns Tab

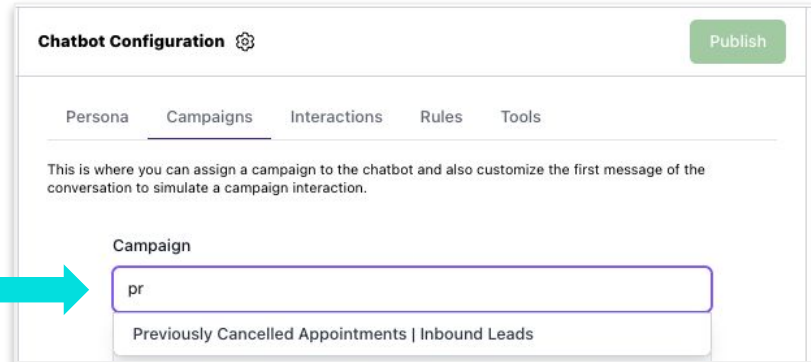
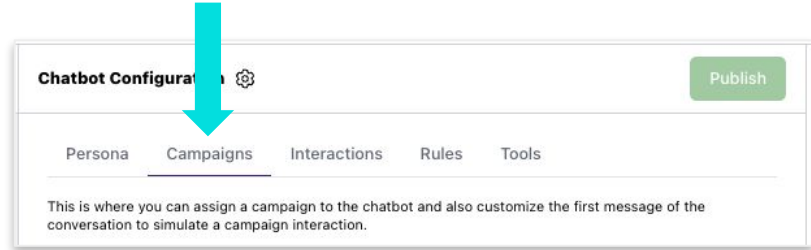
This is where you can assign the bot to one of our Hatch Campaigns. It's also where you set up the first message that will fire in your Sandbox conversation.



How to pick your Campaign

1. Go to the campaigns tab
2. Choose your campaign

Start typing to find the Hatch campaign for the bot to be assigned to.

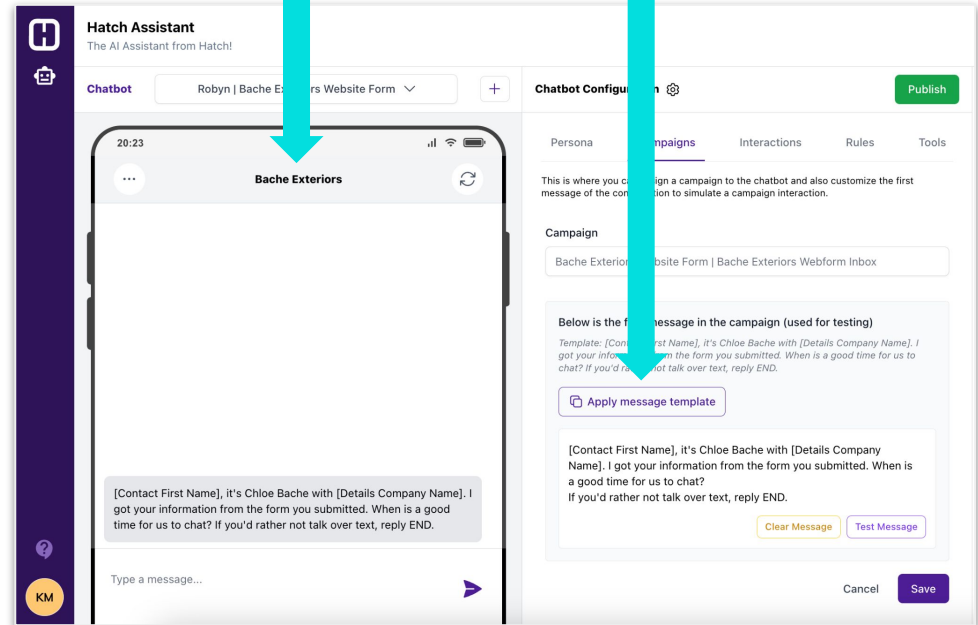


3. Choose the first message

This is just the first message the bot will send to you in your sandbox (your testing environment).

Sandbox where this message appears

First message

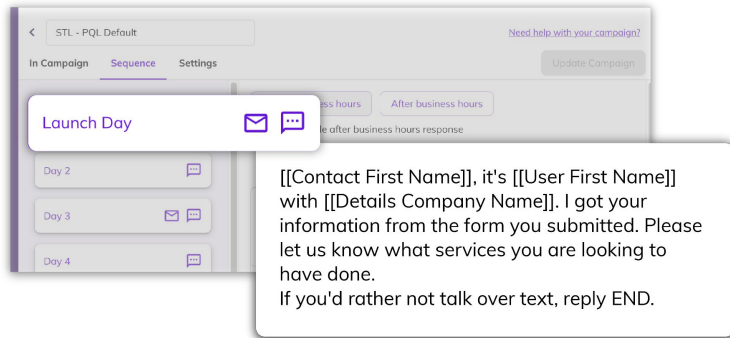


The screenshot displays the Hatch Assistant interface. On the left, a chatbot sandbox is shown with a header for 'Bache Exteriors' and a message from the bot: '[Contact First Name], it's Chloe Bache with [Details Company Name]. I got your information from the form you submitted. When is a good time for us to chat? If you'd rather not talk over text, reply END.' A cyan arrow points to this message with the label 'Sandbox where this message appears'. On the right, the 'Chatbot Configuration' panel is open to the 'Campaigns' tab. It shows a campaign named 'Bache Exteriors Website Form | Bache Exteriors Webform Inbox'. Below the campaign name, there is a section titled 'Below is the first message in the campaign (used for testing)' which contains the same message template as seen in the sandbox. A cyan arrow points to this template with the label 'First message'. The configuration panel also includes buttons for 'Apply message template', 'Clear Message', 'Test Message', 'Cancel', and 'Save'.

Notes

- This will populate with the Launch Day text message you created in the Campaigns Page of Hatch.
- If you haven't created a message, nothing will show.

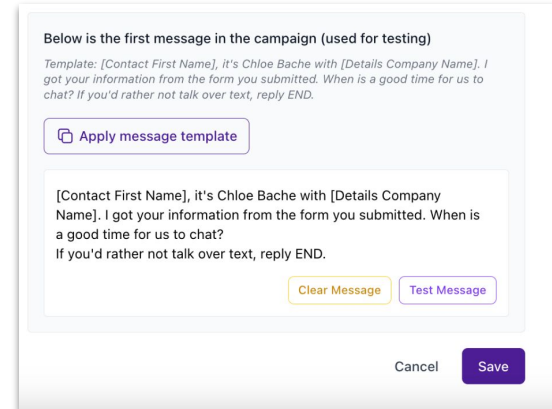
Campaign Page



The screenshot shows the 'Campaign Page' interface. At the top, there's a search bar with 'STL - PQL Default' and a link 'Need help with your campaign?'. Below that are tabs for 'In Campaign', 'Sequence', and 'Settings', along with an 'Update Campaign' button. A 'Launch Day' message card is highlighted, showing a preview of the message content: "[[Contact First Name]], it's [[User First Name]] with [[Details Company Name]]. I got your information from the form you submitted. Please let us know what services you are looking to have done. If you'd rather not talk over text, reply END."



Hatch Assistant Page

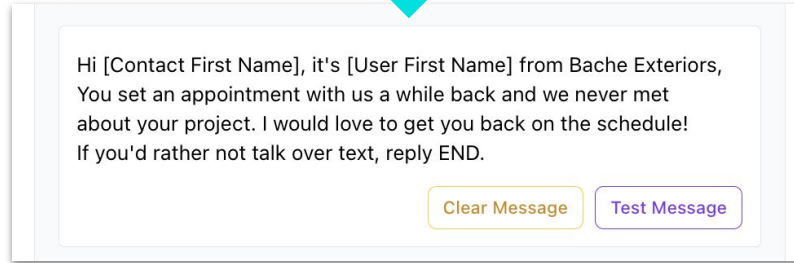


The screenshot shows the 'Hatch Assistant Page'. It features a text area with the message: "Below is the first message in the campaign (used for testing)". Below this is a template: "Template: [[Contact First Name]], it's Chloe Bache with [[Details Company Name]]. I got your information from the form you submitted. When is a good time for us to chat? If you'd rather not talk over text, reply END." There is an 'Apply message template' button. Below the template is a preview of the message in a chat bubble: "[Contact First Name], it's Chloe Bache with [Details Company Name]. I got your information from the form you submitted. When is a good time for us to chat? If you'd rather not talk over text, reply END." At the bottom right, there are 'Clear Message' and 'Test Message' buttons. At the very bottom, there are 'Cancel' and 'Save' buttons.

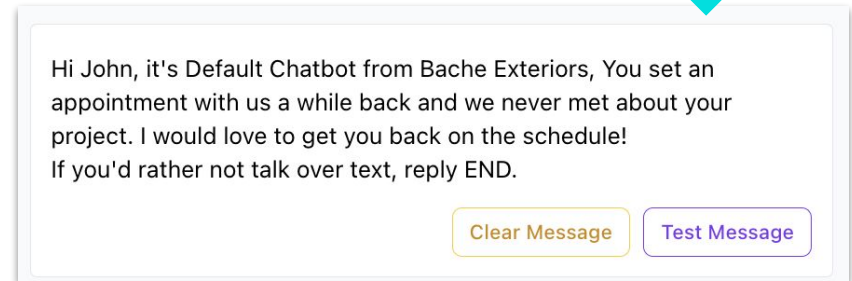
Notes

- Hit “Apply message template” and it will fill in the bot’s name
- You can edit this to be whatever you want

What first populates



What happens when you “Apply message template”



Bot Configuration

Interactions Tab

Hatch Assistant
The AI Assistant from Hatch!

Chatbot: Madeline 2 | STL - PQL QuinStreet

Chatbot Configuration Interactions Rules Publish

These are required questions that your bot is responsible for asking and gathering information from your customer.

Interactions [Global Rollout and Discard Detector](#)

- Can you please provide more details on your project?**
Interaction #1
- What's the physical address for your project?**
Interaction #2
- Are you ready to schedule an appointment?**
Interaction #3

[+ Add Interaction](#)

Answers to Interactions
Below are the results that matches from the extractor that has extracted.

version
Madeline 2 (Draft)

status
Active

Can you please provide more details on your project? ✓
Project includes patios, exterior installations. Use business profile to help answer what we offer.

What's the physical address for your project? ?

Are you ready to schedule an appointment? ?

Chat Window (Bache Exteriors):

Hi Nicholas! This is Madeline with Bache Exteriors. I was looking at your quote, and wanted to see if you had any questions. If you'd rather not talk over text, reply END.

i do have questions

Of course, Nicholas! I'm here to help. Can you please provide more details on your project?

what services do you provide

Bache Exteriors provides services such as Patio Repair, Patio Replacement, New Roofing, Roof Repairs, New Siding, and Replacement Siding.

Type a message...











About Interactions

Interactions are the questions that your bot is responsible for asking the customer and getting an answer to. It's your scripting!

Interactions have four components:

1. Questions
2. Rules
3. Objection handling
4. Global rules

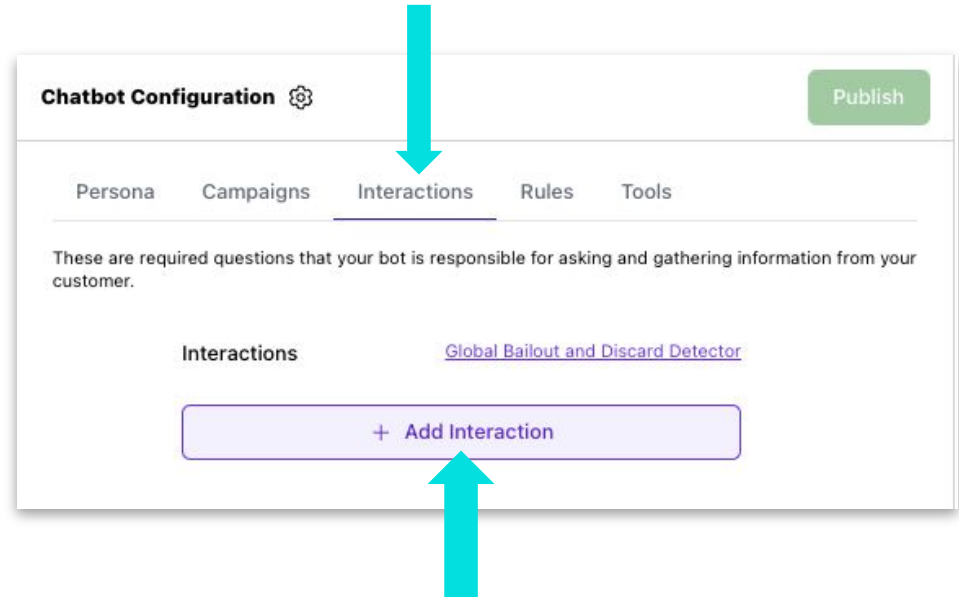
Interactions [Global Bailout and Discard Detector](#)

- Ask what services they are interested in**
Interaction #1   =
- Ask if they can provide more details about what they're experiencing**
Interaction #2   =
- ask the customer If they're ok with the \$75 minimum service fee**
Interaction #3   =
- ask for their home address**
Interaction #4   =
- ask what day and time works best for us to come by**
Interaction #5   =

[+ Add Interaction](#)

How to add an Interaction Question

1. Go to the interactions tab and click “add interaction”



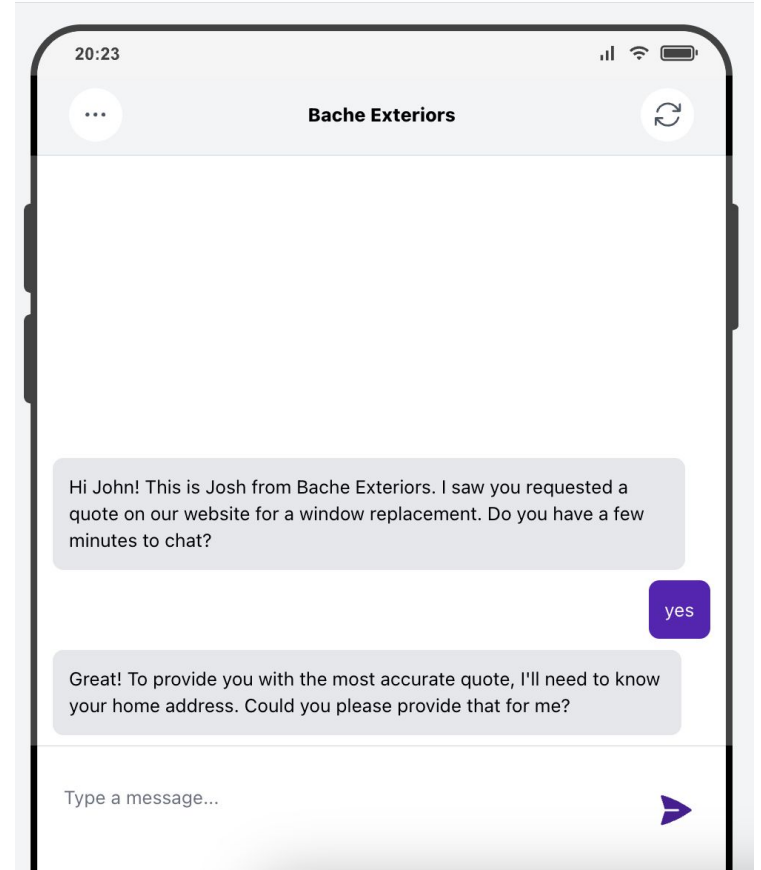
Notes

Your first **INTERACTION** is not the same as the first **MESSAGE**. The first message is configured through the Campaign. The first interaction happens **after** the first **message**.

In other words, it's what you want the bot to say after a customer responds to that first message.

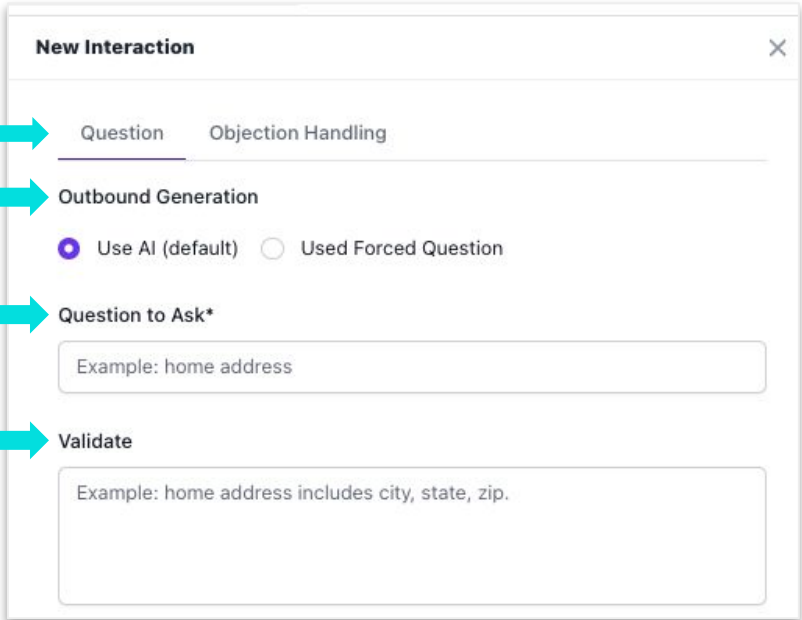
First
MESSAGE →

First
INTERACTION →



2. Configure the Interaction question

- a. **Question Tab:** Where you will give the bot instructions on asking the question.
- b. **Outbound Generation:** How you want the bot to ask the question. You have two options:
 - **Use AI:** Let the bot come up with its own wording for the question (preferred)
 - **Used Forced Question:** Have the bot follow your exact script.
- c. **Question to Ask:** Type the question you want the bot to ask the customer
- d. **Validate:** Tell the bot what type of answer is valid (see examples)



The screenshot shows the 'New Interaction' configuration window with four red arrows pointing to specific sections:

- a** points to the 'Question' tab.
- b** points to the 'Outbound Generation' section, which includes radio buttons for 'Use AI (default)' (selected) and 'Used Forced Question'.
- c** points to the 'Question to Ask*' text input field, which contains the example text 'Example: home address'.
- d** points to the 'Validate' text input field, which contains the example text 'Example: home address includes city, state, zip.'

Interaction example using Forced Question

- **Outbound Generation:** Use Forced Question
- **Say this exactly:** *Great! I would love to help you out. First, can i get your address so I can confirm that we service your area?*
- **Question to Ask:** For their full home address
- **Validate:** full home address must include the street, city, state and zip code

Editing Interaction: for their full home address

Question Objection Handling

Outbound Generation

Use AI (default) Used Forced Question

Say this exactly:*

Great! I would love to help you out. First, can i get your address so I can confirm that we service your area?

Question to Ask*

for their full home address

Validate

full home address must including street, city, state, zip to be valid

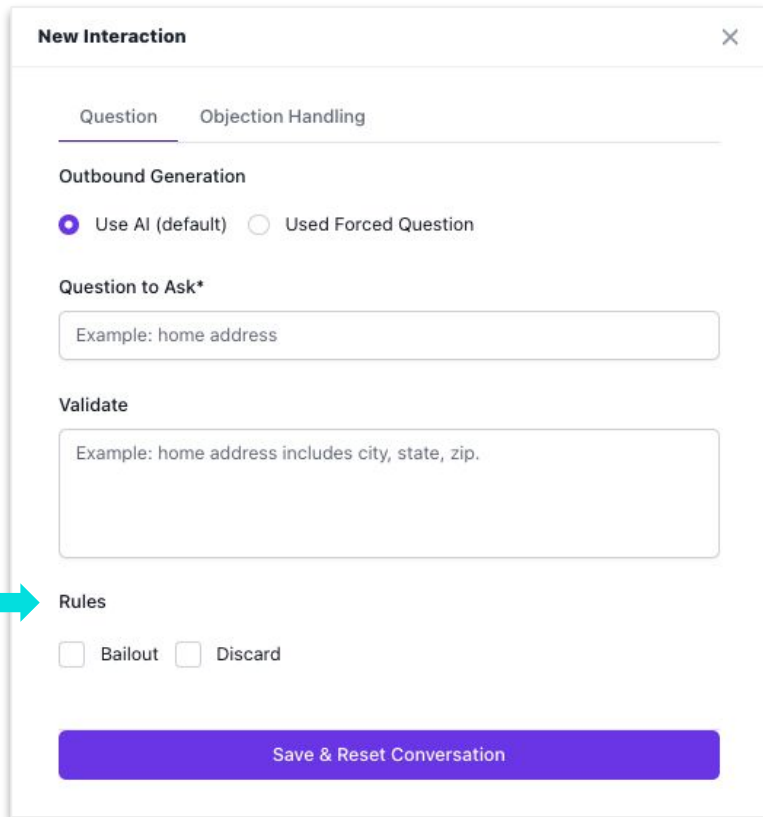
About Interaction Rules

The Bailout and Discard Rules are what you want the bot to say when it detects each of those scenarios:

- A **Bailout** is when the customer needs to be connected with a human rep.
- A **Discard** is when a customer doesn't meet your criteria.

It's basically telling the bot how to end the conversation.

NOTE: These rules apply to only this Interaction ONLY. They are not the same as the Global Bailout/Discard rules in the Interactions tab.



New Interaction ✕

Question Objection Handling

Outbound Generation

Use AI (default) Used Forced Question

Question to Ask*

Example: home address

Validate

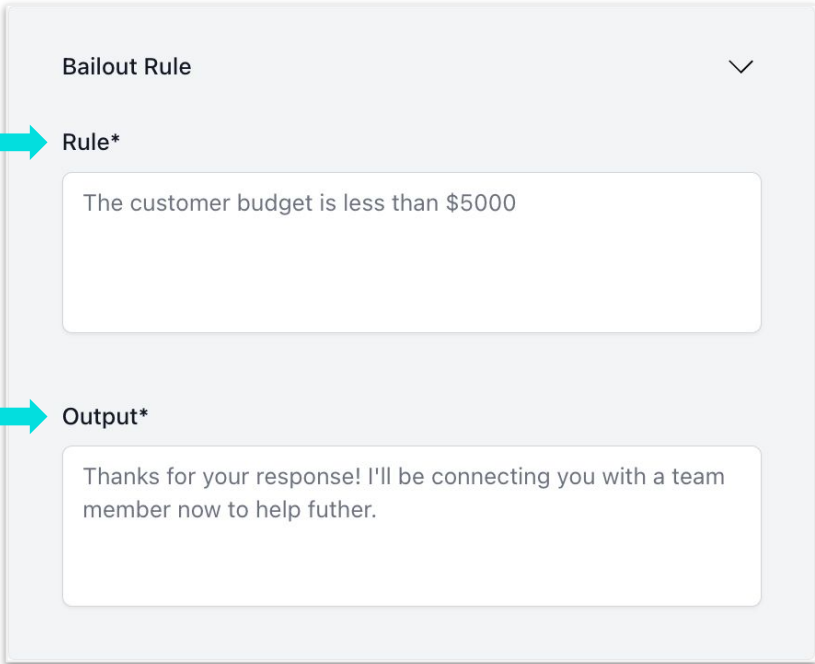
Example: home address includes city, state, zip.

Rules

Bailout Discard

Save & Reset Conversation

- a. **Rule:** Tell the bot what kind of answer to the Interaction question will constitute a bailout
- b. **Output:** Instructions on how you want the bot to communicate this to the customer



Bailout Rule ▼

a → Rule*

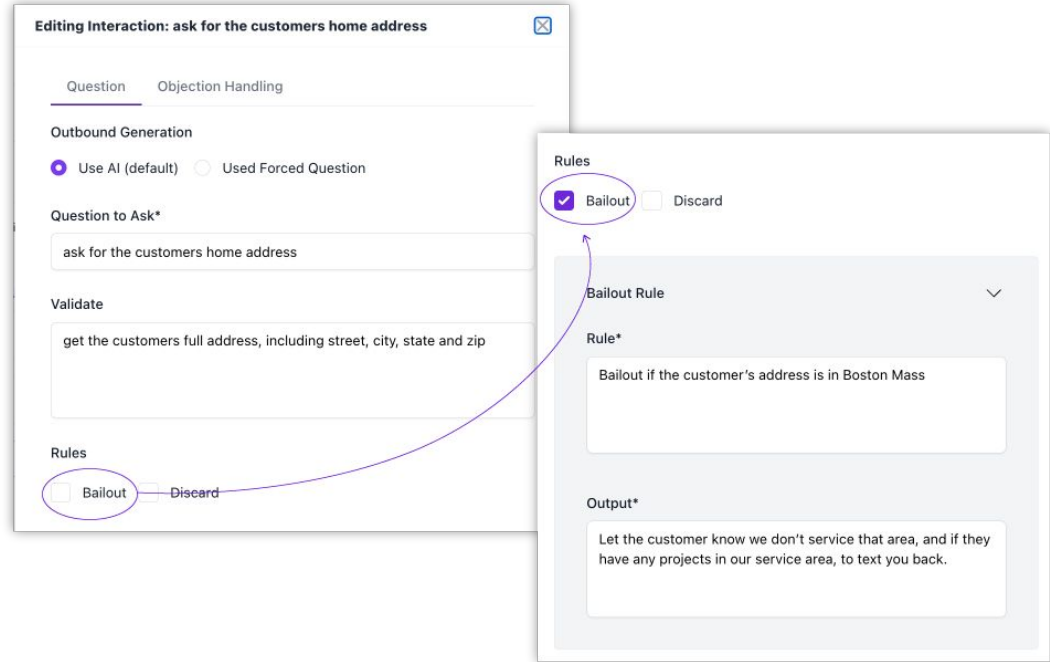
The customer budget is less than \$5000

b → Output*

Thanks for your response! I'll be connecting you with a team member now to help futher.

Interaction + Rule example

- **Interaction:** Ask for the customer's home address.
- **Validate:** Full address must include street, city, state, and zip.
- **Bailout Rule:** Bailout if the customer's address is in Boston, Mass.
- **Output:** Let the customer know we don't service that area, and if they have any projects in our service area, to text you back.

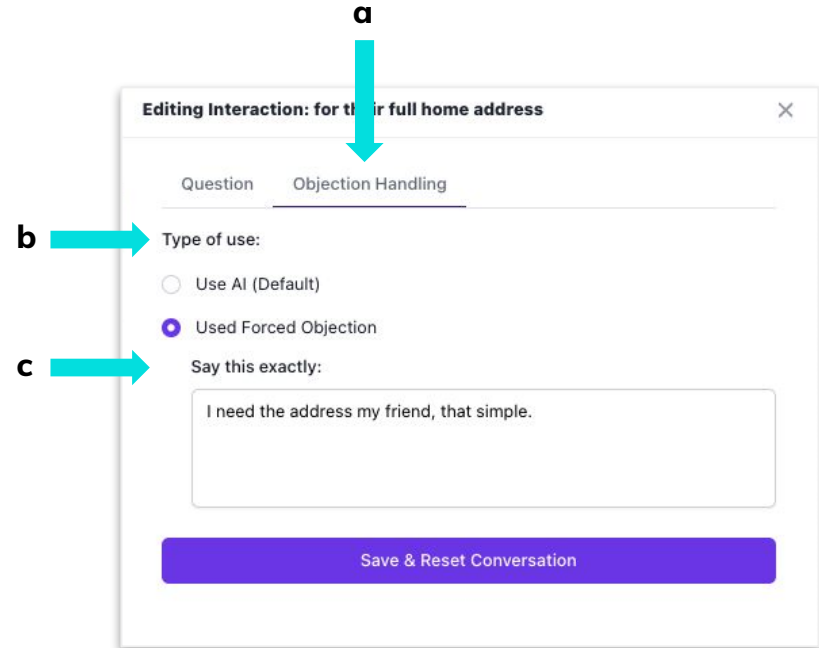


The screenshot displays the 'Editing Interaction' configuration interface for the interaction 'ask for the customers home address'. The interface is divided into two tabs: 'Question' and 'Objection Handling'. The 'Question' tab is active, showing the 'Question to Ask*' field with the text 'ask for the customers home address' and the 'Validate' field with the text 'get the customers full address, including street, city, state and zip'. The 'Rules' section at the bottom of the 'Question' tab has a 'Bailout' checkbox checked and a 'Discard' checkbox unchecked. A purple circle highlights the 'Bailout' checkbox, and a purple arrow points from it to a larger, detailed view of the 'Bailout Rule' configuration on the right. This detailed view shows the 'Rule*' field with the text 'Bailout if the customer's address is in Boston Mass' and the 'Output*' field with the text 'Let the customer know we don't service that area, and if they have any projects in our service area, to text you back.'

About objections

An objection refers to when the customer objects to the specific Interaction question.

- a. **Objections Handling Tab:** Used to instruct the bot what to say if a customer objects.
- b. **Type of use:** How will the bot decide what to say?
 - i. **Use AI:** Let AI come up with the wording.
 - ii. **Use Forced Objection:** Have the bot follow your exact script.
- c. **Say this exactly:** Only if you choose “Use Forced Question”



a

Editing Interaction: for their full home address

Question Objection Handling

b Type of use:

Use AI (Default)

Used Forced Objection

c Say this exactly:

I need the address my friend, that simple.

Save & Reset Conversation

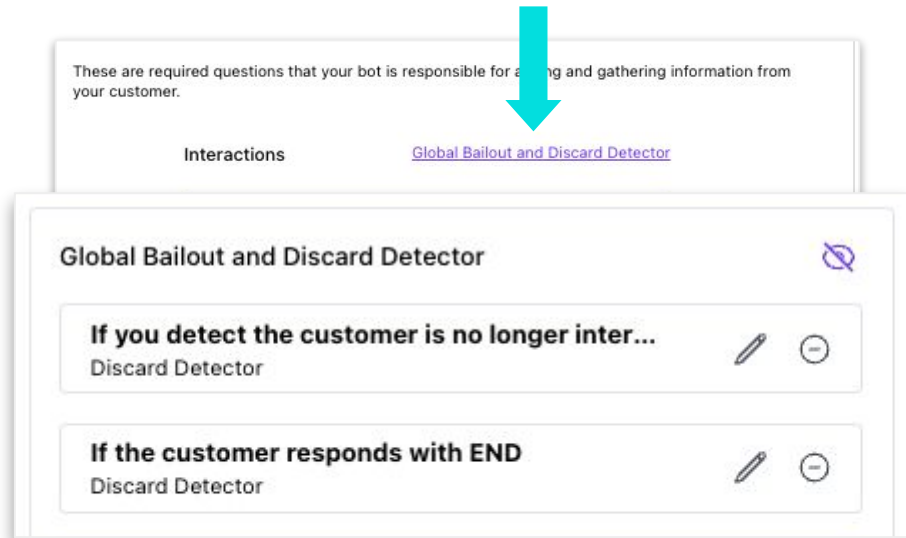
About Global Rules

This is where you tell the bot to look out for Bailout or Discard scenarios throughout the entire conversation.

These are **global**, meaning they apply to the **entire conversation** and reflect your general business standards.

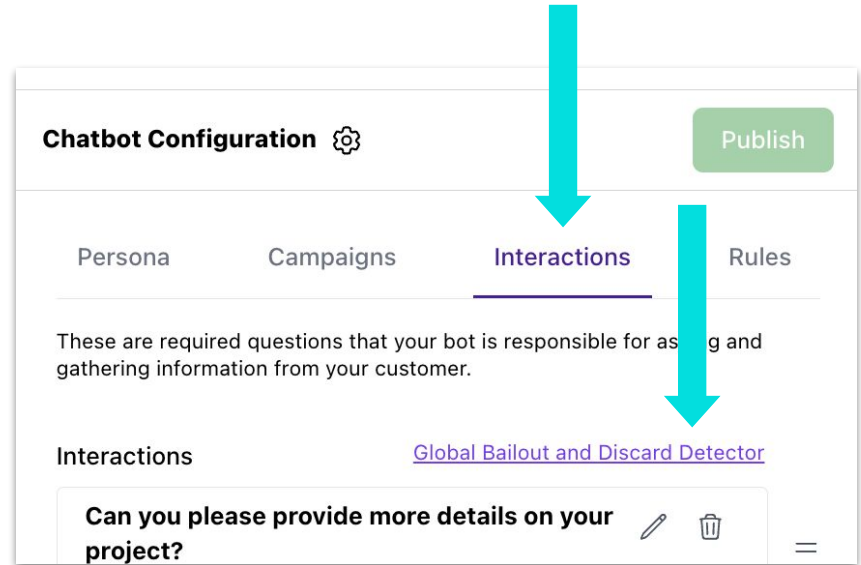
For example:

- If you detect the customer is no longer interested
- If the customer responds with END



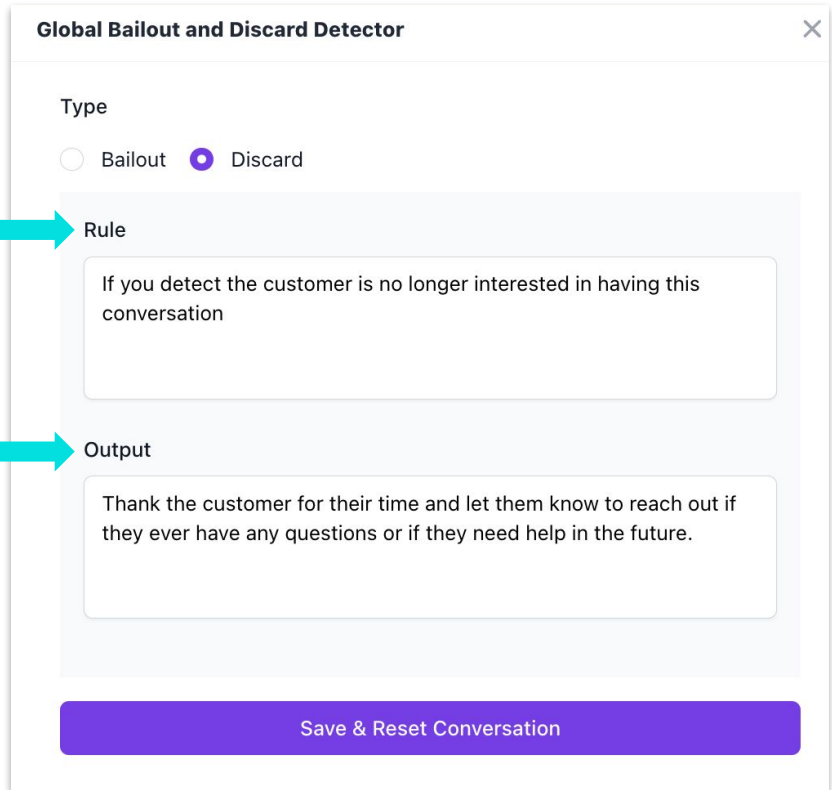
How to add a Global Rule

1. Go to the Interactions tab and click “Global Bailout and Discard Detector”



Global Discard Rule example


- a. **Rule:** If you detect the customer is no longer interested in having this conversation
- b. **Output:** Thank the customer and let them know to reach out if they have any questions or need help in the future.




Global Bailout and Discard Detector ✕

Type

Bailout Discard

a  Rule

If you detect the customer is no longer interested in having this conversation

b  Output

Thank the customer for their time and let them know to reach out if they ever have any questions or if they need help in the future.

Save & Reset Conversation

Bot Configuration

Rules Tab

Hatch Assistant
The AI Assistant from Hatch

Chatbot Madeline 2 | STL - PQL QuinStreet

Chatbot Configuration [Publish](#)

Persona Campaigns Interactions **Rules**

Below are instructions you can give to the bot after all questions are answered and information is gathered.

Success Ballout Discard

Choose an action you want to assign the success

Select an action

How do you want the bot to handle conversation on success?

Recap the conversation and thank them for their business.

[Save](#)

Answers to Interactions

Below are the results that matches from the extractor that has extracted.

version
Madeline 2 (Draft)

status
Active

Can you please provide more details on your project? ✓
Project includes patios, exterior installations. Use business profile to help answer what we offer.

What's the physical address for your project?

Are you ready to schedule an appointment?

About the Rules Tab

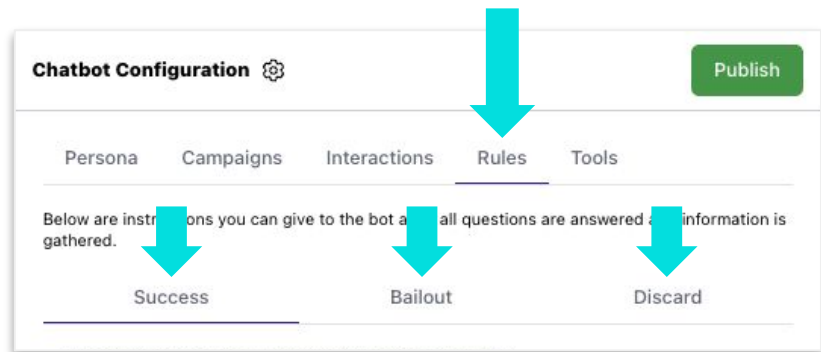
Rules are the actions you want your bot to take based on the outcome of the conversation.

There are three different outcomes:

- Success
- Bailout
- Discard

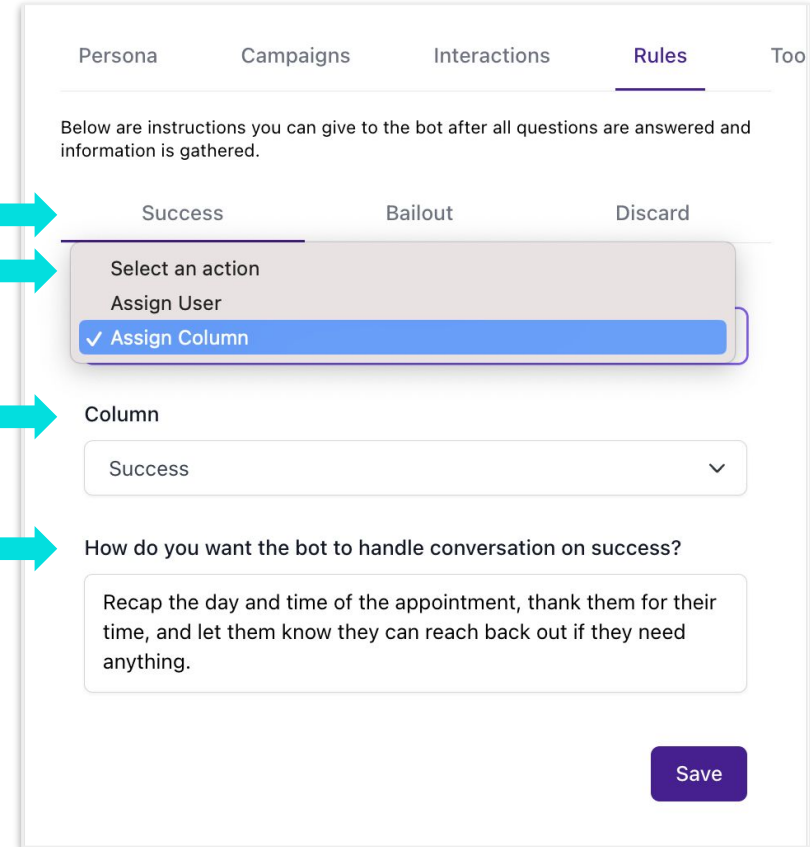
Notes

These Rules are for the conversation as a whole. They are not the same as the Bailout and Discard rules that you can set within each Interaction.



How to create a Rule

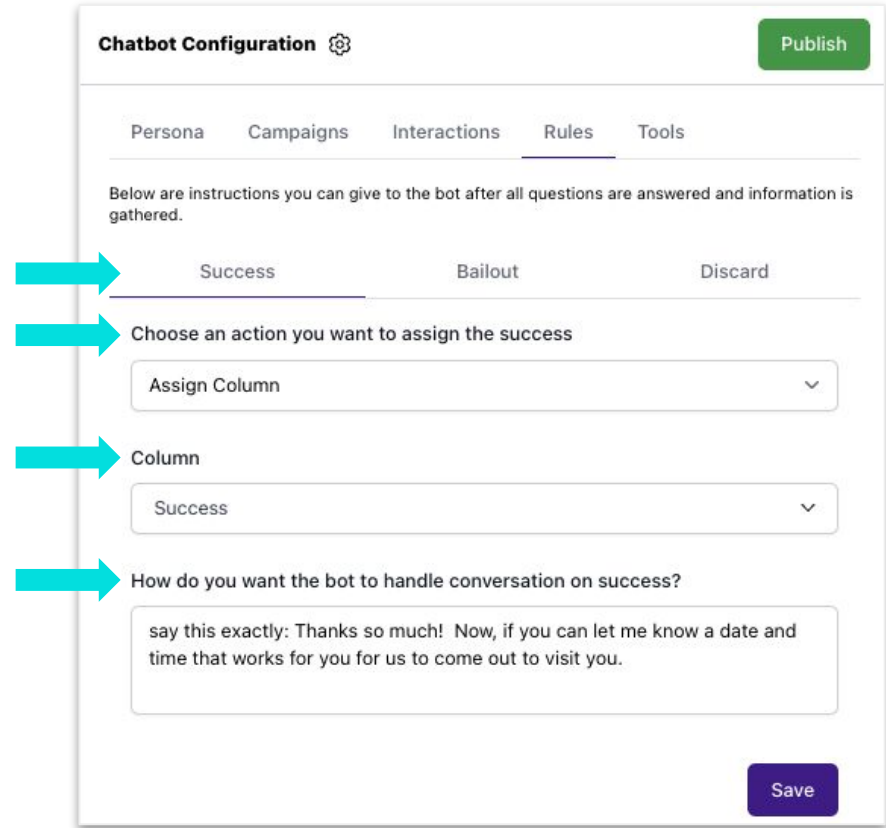
1. Click on the outcome you want to create the rule for. Success, Bailout, or Discard.
2. Choose an action: You have two options:
 - a. **Assign Column:** The bot will move this conversation to a particular column in your workspace
 - b. **Assign User:** The bot will assign this conversation to a user in your Hatch account
3. Specify which Column/User: You'll get a drop-down of options to choose from.
4. Tell the bot what to say: You can provide a general instruction or tell the bot to "say this exactly:"




The screenshot shows the 'Rules' configuration page in Hatch. At the top, there are tabs for 'Persona', 'Campaigns', 'Interactions', 'Rules', and 'Too'. Below the tabs, there is a heading 'Below are instructions you can give to the bot after all questions are answered and information is gathered.' Underneath, there are three outcome options: 'Success', 'Bailout', and 'Discard'. A red arrow labeled '1' points to the 'Success' tab. A second red arrow labeled '2' points to a dropdown menu that is open, showing 'Select an action', 'Assign User', and 'Assign Column' (which is selected with a checkmark). A third red arrow labeled '3' points to a dropdown menu labeled 'Column' with 'Success' selected. A fourth red arrow labeled '4' points to a text area for instructions, containing the text: 'Recap the day and time of the appointment, thank them for their time, and let them know they can reach back out if they need anything.' At the bottom right, there is a blue 'Save' button.

Example Rule for Success outcome

- **Outcome:** Success
- **Choose an Action:** Assign Column
- **Column:** Success
- **Instructions:** Say this exactly: “Thanks so much! Now, if you can, let me know a date and time that works for you for us to come out to visit you.”



The screenshot shows the 'Chatbot Configuration' interface with the 'Rules' tab selected. The 'Success' outcome is chosen, and the action is set to 'Assign Column' with the column 'Success'. The instructions are: 'say this exactly: Thanks so much! Now, if you can let me know a date and time that works for you for us to come out to visit you.' Red arrows point to the 'Success' tab, the 'Choose an action' dropdown, the 'Column' dropdown, and the instructions text area.

Chatbot Configuration  Publish

Persona Campaigns Interactions **Rules** Tools

Below are instructions you can give to the bot after all questions are answered and information is gathered.

Success Bailout Discard

Choose an action you want to assign the success

Assign Column

Column

Success

How do you want the bot to handle conversation on success?

say this exactly: Thanks so much! Now, if you can let me know a date and time that works for you for us to come out to visit you.

Save

Bot Configuration

Tools Tab

Hatch Assistant
The AI Assistant from Hatch

Chatbot Madeline 2 | STL - PQL QuinStreet

Chatbot Configuration [Publish](#)

Persona Campaigns Interactions Rules **Tools**

Stalled Conversations

Stalled Conversations Rule

Wait hours and then follow up with the conversation.

You can make attempts to get a response.

If you don't get a response, take this action:

[Save](#)

Answers to Interactions

Below are the results that matches from the extractor that has extracted.

version
Madeline 2 (Draft)

status
Active

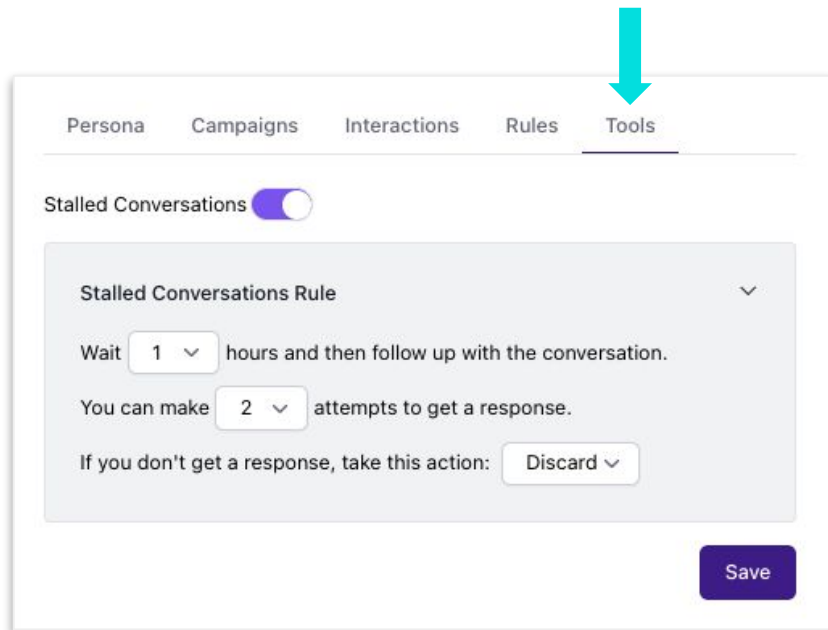
Can you please provide more details on your project? ✓
Project includes patios, exterior installations. Use business profile to help answer what we offer.

What's the physical address for your project?

Are you ready to schedule an appointment?

Stalled Conversations: Use this to instruct your bot on how to KEEP following up when a conversation stalls.

1. **Wait 1 - 24 hours:** How long the bot will wait before it reaches back out to a customer.
2. **You can make 2-10 attempts:** How many times the bot will attempt to get in touch with the customer.
3. **Action:** The action the bot will take if it doesn't get a response. It will follow your RULES tab.

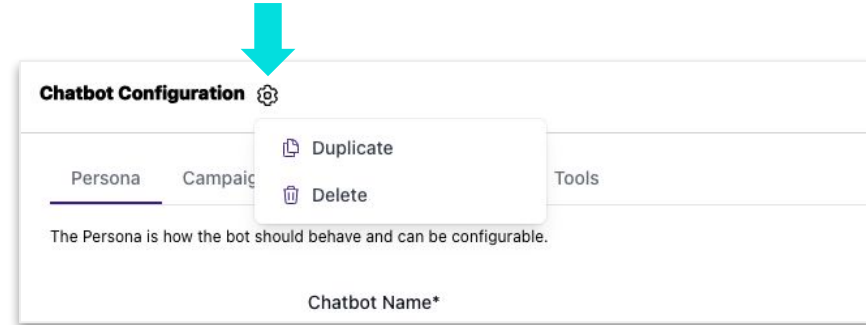


The screenshot shows the Hatch bot configuration interface. At the top, there are navigation tabs: Persona, Campaigns, Interactions, Rules, and Tools. A red arrow points to the Tools tab. Below the tabs, there is a toggle switch for "Stalled Conversations" which is turned on. Underneath, there is a section titled "Stalled Conversations Rule" with a dropdown arrow. The settings are: "Wait 1 hours and then follow up with the conversation." and "You can make 2 attempts to get a response." Below that, there is a field "If you don't get a response, take this action:" with a dropdown menu set to "Discard". At the bottom right, there is a "Save" button.

Bot Testing, Publishing, & Editing

Gear Icon

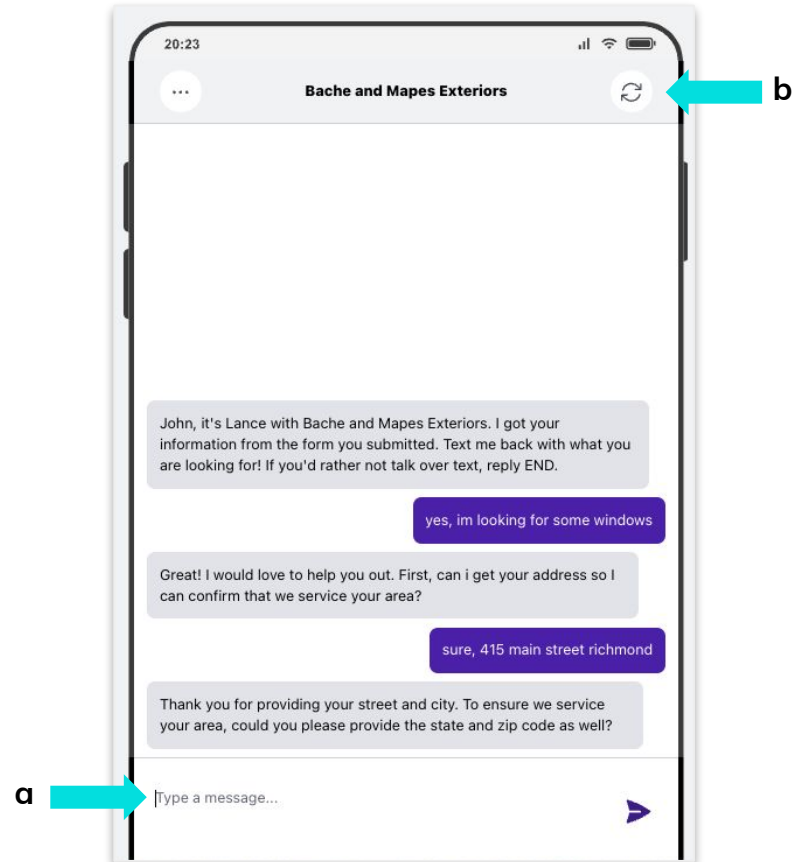
- 1. Duplicate:** If you have the perfect bot and you want to use it on another campaign, you can DUPLICATE the bot and the script and rules will duplicate to a new bot.
- 2. Delete:** If you built a bot and no longer need it, delete it at any time.



Sandbox - Testing in the Phone

- a. Use this to test all the different types of customer scenarios BEFORE launching your bot
 - Test happy path
 - Test missing information
 - Test bailouts
 - Test discards
 - Test vague responses

- b. You can reset the conversation as you make refinements so you can test each one.



Answers to Interactions

Use this to see that the bot is collecting the right answers to your interactions.

1. **If the data collected:** You get a green check.
2. **If the data is not collected:** It remains blank.

Answers to Interactions



Below are the results that matches from the extractor that has extracted.

version

Madeline 2 (Draft)

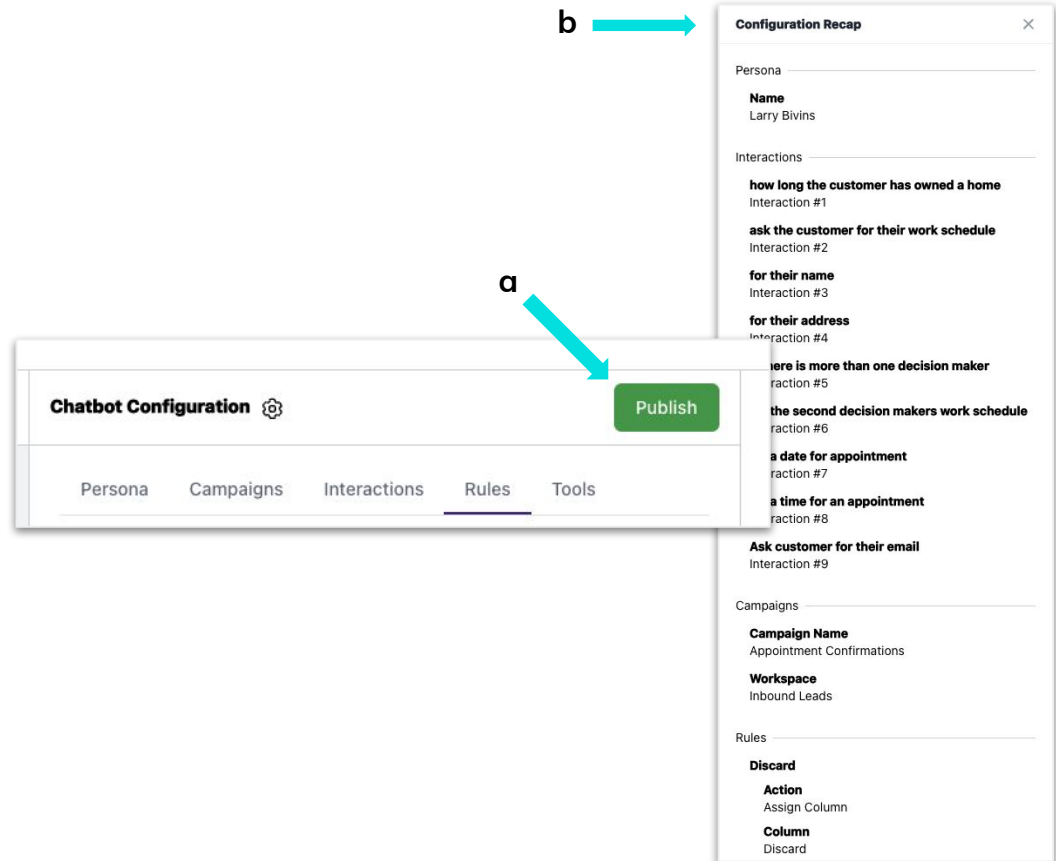
status

Active

- a**  **Can you please provide more details on your project? ✓**
Project includes patios, exterior installations. Use business profile to help answer what we offer.
- b**  **What's the physical address for your project? ?**
-
- Are you ready to schedule an appointment? ?**
-

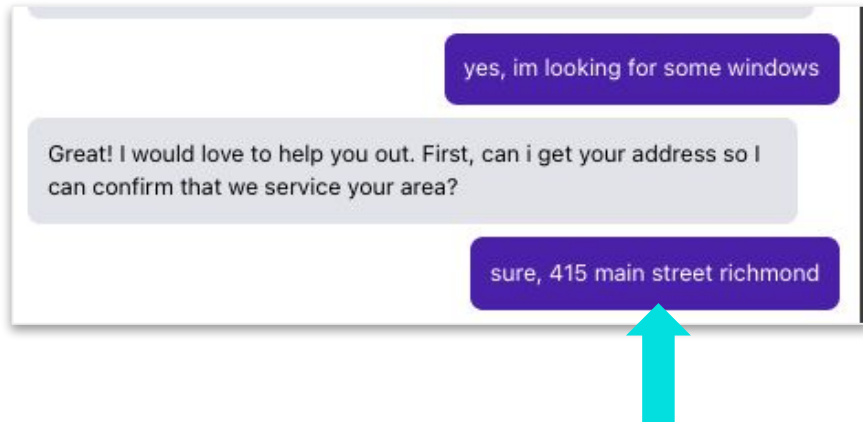
Publishing

1. **Publish:** Will appear green after you fill in all of the campaigns and rules for your bot. You are ready to publish
2. **Recap:** Shows you everything you have set up, in a receipt.



Debugging AI in Testing Tool

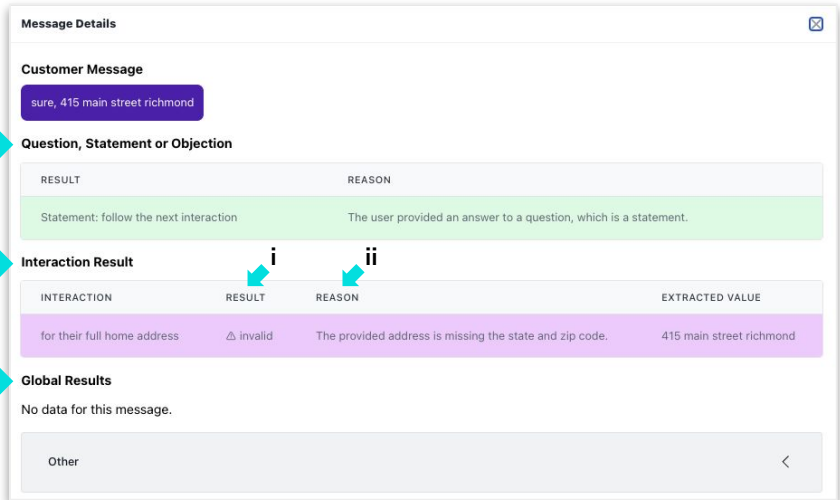
1. Click on any PURPLE answer that didn't match your expected result.



Debugging AI in Testing Tool

2. Here's how to read the report:

- a. **Questions, Statement and Objection:** Shows if the message is either a statement, question or objection AND the reason why.
- b. **Interaction Result:** Shows the result of your prompt. In this example:
 - i. **Result:** Full Address is INVALID
 - ii. **Reason:** Missing state and zip code.
- c. **Global Interactions:** Shows if your Global Interaction was activated.



The screenshot shows a 'Message Details' window with the following content:

Customer Message
sure, 415 main street richmond

Question, Statement or Objection

RESULT	REASON
Statement: follow the next interaction	The user provided an answer to a question, which is a statement.

Interaction Result

INTERACTION	RESULT	REASON	EXTRACTED VALUE
for their full home address	△ invalid	The provided address is missing the state and zip code.	415 main street richmond

Global Results
No data for this message.

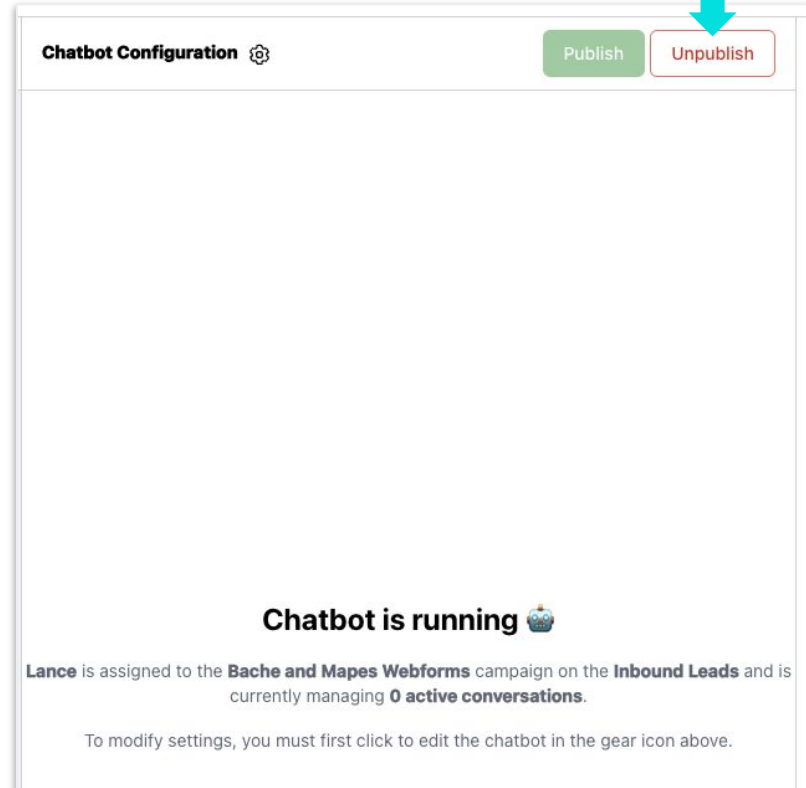
Other <

Annotations: 'a' points to the 'Question, Statement or Objection' section; 'b' points to the 'Interaction Result' table; 'c' points to the 'Global Results' section. Within the 'Interaction Result' table, 'i' points to the 'RESULT' column and 'ii' points to the 'REASON' column.

Un-Publishing

If you want to completely unpublish a bot from having conversations, use this feature.

Used only when completely turning the bot off, if you want to make changes but keep the bot live, use EDIT feature.



Editing a Published Bot

- a. **Edit:** Allows the user to update interactions, prompts, and rules and then TEST how those changes affect the performance of the bot.

The bot stays published while you make those changes!!!

- b. **Publish Changes:**
Now, your bot will apply these changes to any NEW conversations

