

Starting Guide For Developers

List of changes

Date	Changes
21.04.2022	New API manual link (now in Postman)
01.12.2021	Minor decorative changes
02.08.2021	External channel scheme updated
14.07.2021	Formatting and hyperlinks updated
27.07.2019	iFrame integration
12.12.2018	Hints section added
01.12.2018	Initial version

What is Chat2Desk?

Chat2Desk is a leading messenger aggregation platform for two-way communications via messengers and social networks: WhatsApp, Viber, Facebook, Instagram, Telegram, VKontakte, Odnoklassniki, Avito, Email, Online chat 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
- Communicate with clients via messengers from inside your service
- Build chatbots 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
4. POST request using macro
5. HTTP request from Sales tunnel

Before you begin, you should be registered at chat2desk.com. To start using the service in full mode contact our support via widget on the site.

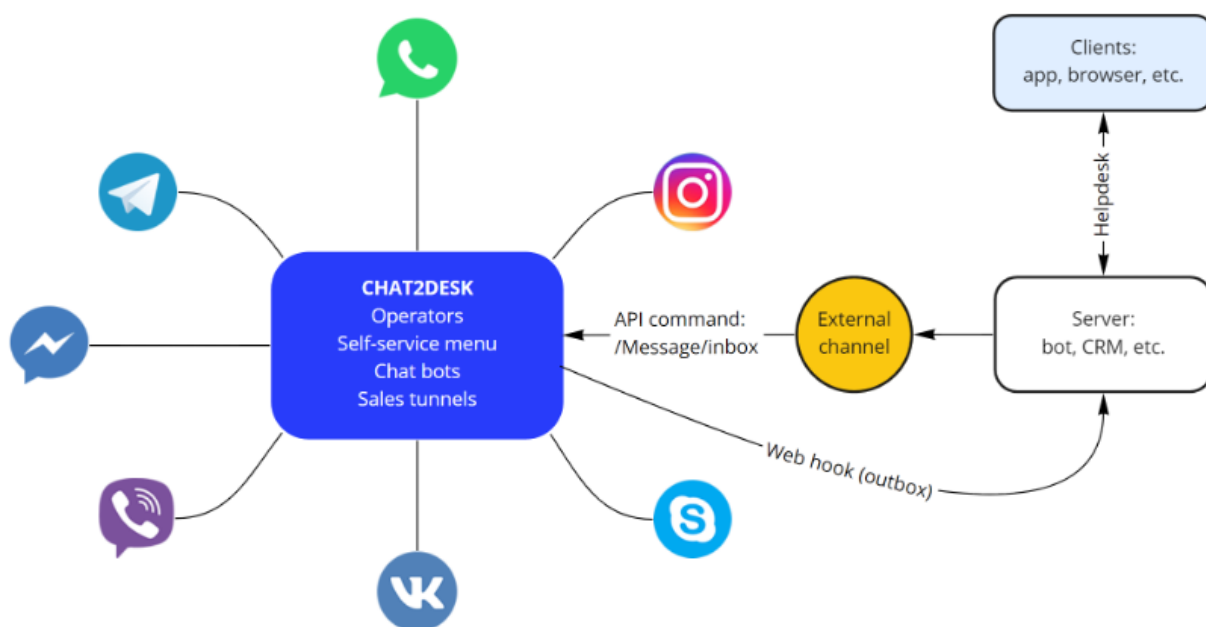
API

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

To implement helpdesk support with operators (agents) working in Chat2Desk into your own product, you should use an *external channel*. It allows you 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 tunnels, auto answers, etc) you should use a web hook for *outbox* event and then forward them to the clients of your product.



Principal scheme of external channel

Contact our support to connect the external channel to your account.

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** section on the Chat2Desk site. To turn the script functionality on, contact our support.

Scripts are another way of programming Chat2Desk. They have most of the Python libraries and functionality as well as specialized Chat2Desk functions. Basically, they are used to manage 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 a script — see Scripts manual.

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 a 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 function¹.
- When a client uses a specified self-service menu item. See **Settings > Self-service menu**, create a menu item and specify your script function².
- Using macros. See **Settings > Macros**. You can add calling a script function³ as one of the macro actions. Macros are run from the *Chats* section using the star button.
- From the outside service by calling a dedicated Chat2Desk URL. You can get this URL from **Settings > Scripts**, in the script events list look for *Web hook call from external service (manually_handler)*.
- When this URL is called using POST or GET methods, the corresponding Chat2Desk handler *Manually_handler* is run and the request data is available inside this handler in *input_data* variable.

Using this scenario works a WhatsApp business card feature: 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 the customer and sends a specified message via WhatsApp. See this script example in the Scripts manual.

iFrame

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

There are 3 modes for displaying the Chat2Desk UI inside an iFrame. Use a regular URL to a dialog along with *minifiedView* parameter which can take values 1, 2 or 3.

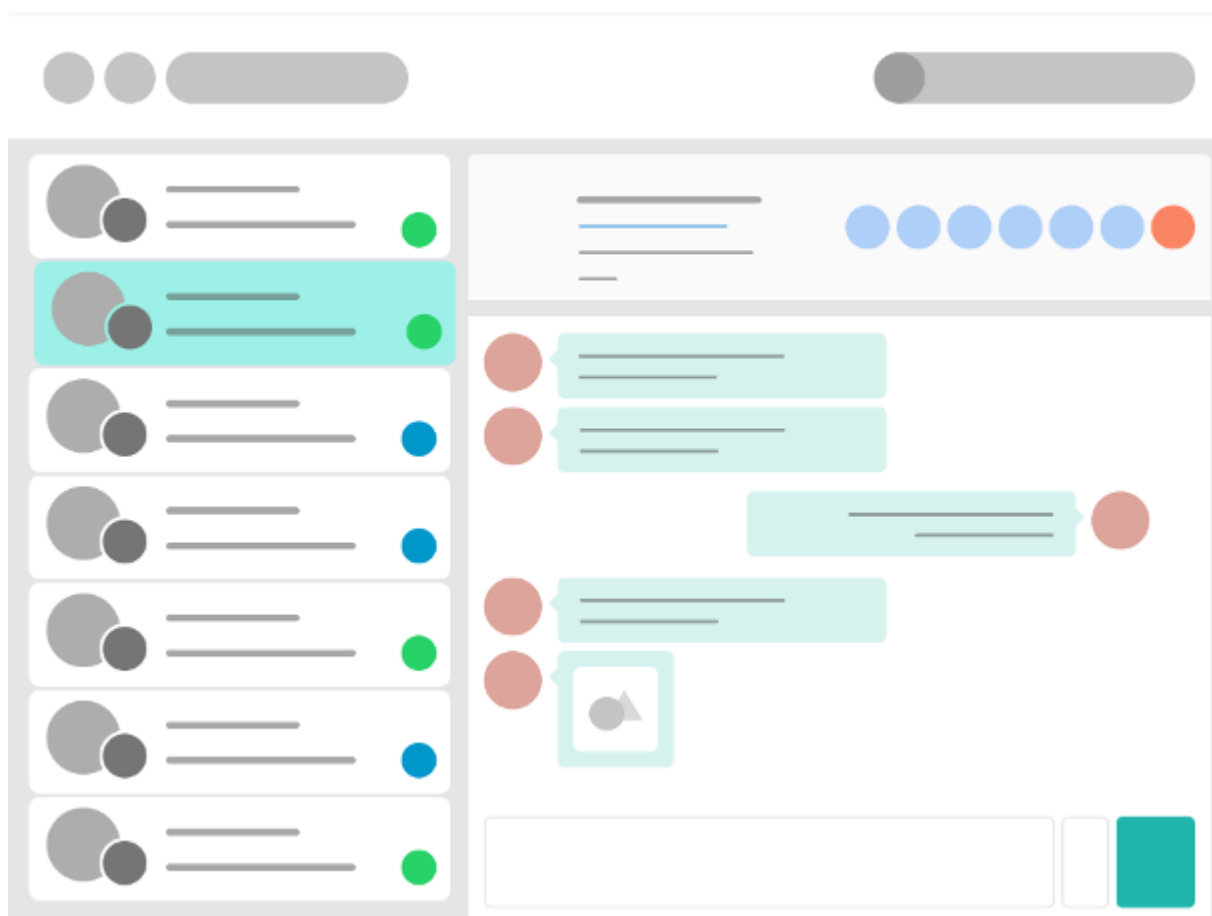
¹ The function should be inside Handler class and be called as specified + "_handler". Example: def macro_call_handler(self, input_data, c2d).

² Same as 1 above

³ Same as 1 above

Mode 1

Left menu hidden, dialog list is shown and all other options are available. In this case *dialogID* is optional.



<https://web.chat2desk.com/chat/all?dialogID=63&minifiedView=1>

Mode 2

Only the dialog specified in the URL is shown, with ability to reply.



<https://web.chat2desk.com/chat/all?dialogID=63&minifiedView=2>

Mode 3

Only the content of specified dialog is shown, without the ability to reply.



<https://web.chat2desk.com/chat/all?dialogID=63&minifiedView=3>

POST request using macro

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

When setting up the macro action, you can specify an authorization token to send with the POST request. If the external service returns an "URL" data field, the specified URL is opened in a 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.

HTTP request from Sales tunnel

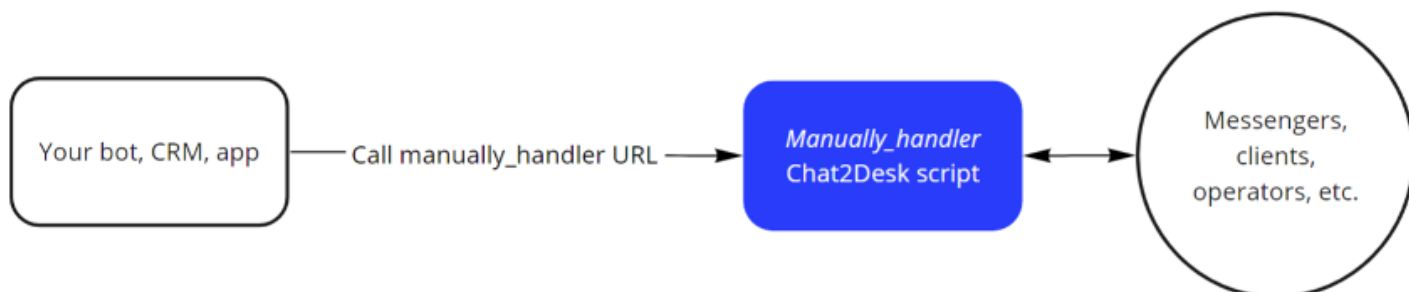
Sales tunnel (also known as *Sales funnel*) is a Chat2Desk marketing tool which lets you automatically send a chain of messages to your clients based on their data and actions. The tunnel can consider many parameters and events and can perform various actions on each tunnel step. One of the Sales tunnel 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 a WhatsApp message to a client after he or she has left a phone number on your site or his or her order has arrived.



2. If you need to process low scores of your 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 a valuation request (not to the client). See request definition in Statistics manual: in [English](#), in [Russian](#).
 - b. Set up a 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 a 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:
 - a. Questioning. It is possible to save each client answer to a specified client info card field.
 - b. Payments. Sales tunnels can automatically generate payment links upon keywords or templates in operators' replies.

Contact for more info

Feel free to use these resources for more information:

- Chat2Desk Telegram channels:
 - @c2d_news (in Russian) — https://t.me/c2d_news
 - @c2d_news_en (in English) — https://t.me/c2d_news_en
- Widget with messengers at chat2desk.com
- support@chat2desk.com