

1 Navigate to <https://dashboard.upscaleup.io/dashboard>

NEW: You Can Now Add Contacts In Multiple Groups. Check It Out, Chaitanya 🙌

[Add Contact](#) [Create / Schedule Campaign](#) [Create Template](#)

Contacts	Campaigns	Templates	All Chats
8373	43	55	16142
View Contacts	View Campaigns	View Templates	View Chats

Active Subscription
Your Subscription Expires On 2025-12-27 19:14:23

Campaigns
Below Are Your Outgoing Or Scheduled Campaigns

You Do Not Have Any Outgoing Or Scheduled Campaigns

[Create / Schedule Campaign](#)

Team: TECHNOGEEKZ

Chat Activity Chart:

Date	Inbound Chats	Outbound Chats
20 Apr	0	0
21 Apr	0	0
22 Apr	12	0
23 Apr	6	0
24 Apr	0	0
25 Apr	0	3

2 Click "Setup ChatBots"

The screenshot shows the Scaleup dashboard. The left sidebar contains a navigation menu with the following items: Dashboard, Chats (1674), Contacts, Campaigns, Message Templates, **Setup ChatBots** (highlighted with an orange circle), Team, Account Settings, Billing & Subscription, Support Desk, and Developer Tools. The main content area is titled 'Dashboard' and includes a notification: 'NEW: You Can Now Add Contacts In Multiple Groups. Check It Out, Chaitanya 🙌'. Below the notification are three buttons: 'Add Contact', 'Create / Schedule Campaign', and 'Create Template'. There are four summary cards: 'Contacts 8373' with a 'View Contacts' link, 'Campaigns 43' with a 'View Campaigns' link, 'Templates 55' with a 'View Templates' link, and 'All Chats 16142' with a 'View Chats' link. A line graph shows activity from 20 Apr to 25 Apr, with a peak on 22 Apr. An 'Active Subscription' card indicates the subscription expires on 2025-12-27 at 19:14:23. A 'Campaigns' section states 'Below Are Your Outgoing Or Scheduled Campaigns' and 'You Do Not Have Any Outgoing Or Scheduled Campaigns', with a 'Create / Schedule Campaign' button.

3 Click "Basic Replies" to create basic single responder.

The screenshot shows the 'Setup ChatBots' page in the Scaleup dashboard. The left sidebar is the same as in the previous screenshot, with 'Setup ChatBots' highlighted. The main content area is titled 'Setup ChatBots' and includes a sub-header: 'Setup ChatBots and Auto-Replies that respond automatically to messages based on your own criteria.' Below this are two options: 'Basic Replies' (highlighted with an orange circle) and 'Automatic...'. The 'Basic Replies' section has a 'Create' button and a search bar labeled 'Search by name or trigger text'. Below the search bar is a table with the following columns: Name, Trigger Text, Match Criteria, Response Type, and Last Updated.

4 Click "Create"

upscaleup EN << **Setup ChatBots**

① Setup ChatBots and Auto-Replies that respond automatically to messages based on your own criteria.

- Dashboard
- Chats 1674
- Contacts
- Campaigns
- Message Templates
- Setup ChatBots**
- Team
- Account Settings
- Billing & Subscription
- Support Desk
- Developer Tools

Basic Replies Create

Setup ChatBots and Auto-Replies that respond automatically to messages based on your own criteria.

Search by name or trigger text

Name	Trigger Text	Match Criteria	Response Type	Last Updated
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5 Give your basic automation a name for your reference. [this is not the trigger keyword]

upscaleup EN << **Create automation** < Back

① Create reply automation using your own criteria

Name

Trigger

① Add the string of text responsible for triggering the response

Match Criteria

① Select the criteria for matching the trigger text above

Response Type

Text Response

6 Click this field to add the trigger keyword

The screenshot shows the 'Create automation' page in the Scaleup chatbot interface. The left sidebar contains navigation options: Dashboard, Chats (1674), Contacts, Campaigns, Message Templates, Setup ChatBots (highlighted), Team, Account Settings, Billing & Subscription, Support Desk, and Developer Tools. The main content area is titled 'Create automation' and includes a '←Back' button. Below the title, there is a sub-header 'Create reply automation using your own criteria'. The form fields are: Name (Store Location), Trigger (Add the string of text responsible for triggering the response, highlighted with an orange circle), Match Criteria (Select Criteria), Response Type (Respond with text), and Text Response.

7 Click "Select Criteria"

The screenshot shows the 'Create automation' page in the Scaleup chatbot interface. The left sidebar contains navigation options: Chats (1674), Contacts, Campaigns, Message Templates, Setup ChatBots (highlighted), Team, Account Settings, Billing & Subscription, Support Desk, and Developer Tools. The main content area is titled 'Create automation' and includes a 'Team: TECHNOGEEKZ' dropdown and a user profile for 'Chaitanya ... View Profile'. The form fields are: Name (Store Location), Trigger (store location), Match Criteria (Select Criteria, highlighted with an orange circle), Response Type (Respond with text), and Text Response. The Text Response field has a rich text editor with options for Bold, Italic, Underline, Code, and Smiley.

8 Select the appropriate one.

The screenshot shows a chatbot configuration interface. On the left is a sidebar with navigation items: Chats (1674), Contacts, Campaigns, Message Templates, Setup ChatBots (highlighted), Team, Account Settings, Billing & Subscription, Support Desk, and Developer Tools. Below the sidebar, there is a team selection dropdown set to 'Team: TECHNOGEEKZ' and a user profile for 'Chaitanya ... View Profile'. The main configuration area has the following sections:

- Name:** Store Location
- Trigger:** store location
- Match Criteria:** A dropdown menu is open, showing three options: 'When text is an exact match to trigger text' (highlighted with an orange circle), 'When text contains trigger text', and 'Respond with text'.
- Response Type:** Respond with text
- Text Response:** A text input field with a rich text editor toolbar below it containing 'Add Variable', bold (B), italic (I), underline (U), code (</>), and emoji icons.

9 Click here to change response type

This screenshot shows the same chatbot configuration interface as above, but with the 'Match Criteria' dropdown menu closed. The 'When text is an exact match to trigger text' option is now selected and displayed in the dropdown. The 'Respond with text' option is also visible in the dropdown. The 'Save' button is now clearly visible at the bottom right of the configuration area.

10 Select one matching your preferences

The screenshot shows a configuration interface for a chatbot. On the left is a sidebar with navigation options: Chats (1674), Contacts, Campaigns, Message Templates, Setup ChatBots (highlighted), Team, Account Settings, Billing & Subscription, Support Desk, and Developer Tools. Below the sidebar, there is a team selection dropdown set to 'Team: TECHNOGEEKZ' and a user profile for 'Chaitanya ... View Profile'. The main configuration area has four sections: 'Trigger' with a text field containing 'store location'; 'Match Criteria' with a dropdown set to 'When text is an exact match to trigger text'; 'Response Type' with a dropdown menu open, showing options 'Respond with text' (selected with a checkmark), 'Respond with image', and 'Respond with audio'; and 'Text Response' with a rich text editor containing a redacted area. The rich text editor has a toolbar with 'Add Variable', bold, italic, link, code, and emoji icons, and a 'Save' button.

11 Click this field and enter your response.

This screenshot is identical to the previous one, but the 'Response Type' dropdown is closed, and the 'Text Response' field is now highlighted with a red circle, indicating where the user should click to enter their response. The rest of the interface, including the sidebar and other configuration fields, remains the same.

12 Add emojis, make the letters bold etc.

The screenshot shows a chatbot configuration interface. On the left is a sidebar with navigation options: Chats (1674), Contacts, Campaigns, Message Templates, Setup ChatBots (selected), Team, Account Settings, Billing & Subscription, Support Desk, and Developer Tools. Below the sidebar, there is a team selection dropdown set to 'Team: TECHNOGEEKZ' and a user profile for 'Chaitanya ... View Profile'. The main configuration area has four sections: 'Trigger' with a text input 'store location'; 'Match Criteria' with a dropdown 'When text is an exact match to trigger text'; 'Response Type' with a dropdown 'Respond with text'; and 'Text Response' with a text input 'Hey, we are located at ...'. Below the text input is a rich text editor toolbar with 'Add Variable', bold (B), italic (I), underline (U), code (</>), and emoji icons. A 'Save' button is highlighted with an orange circle.

13 Click "Save" to save the basic automation.

This screenshot is identical to the previous one, showing the same chatbot configuration interface. The 'Save' button in the rich text editor toolbar is now highlighted with an orange circle, indicating the next step in the process.

14 This signifies that the basic automation is set properly.

The screenshot shows the 'Setup ChatBots' section of the up scaleup dashboard. The left sidebar contains navigation items: Dashboard, Chats (1674), Contacts, Campaigns, Message Templates, Setup ChatBots (highlighted), Team, Account Settings, Billing & Subscription, Support Desk, and Developer Tools. The main content area is titled 'Create automation' and includes a sub-header 'Create reply automation using your own criteria'. A blue 'Back' button is circled in orange. The form fields are: Name (empty), Trigger (empty, with instruction 'Add the string of text responsible for triggering the response'), Match Criteria (dropdown menu with 'Select Criteria'), Response Type (dropdown menu with 'Respond with text'), and Text Response (text area containing 'Hey, we are located at ...'). A notification box at the top right says 'Data added successfully!' with a close button.

15 Click "Back" to go back to main screen.

This screenshot is identical to the one above, showing the 'Create automation' form. The 'Back' button in the top right corner is highlighted with an orange circle, indicating the next step in the process.

16 Click this icon.

The screenshot shows the 'Basic Replies' section of a dashboard. On the left is a navigation sidebar with items like Dashboard, Chats (1674), Contacts, Campaigns, Message Templates, Setup ChatBots, Team, Account Settings, Billing & Subscription, Support Desk, and Developer Tools. Below the sidebar is a team selector set to 'Team: TECHNOGEEKZ' and a user profile for 'Chaitanya ...'. The main content area has a 'Basic Replies' header with a 'Create' button and a search bar. Below is a table with columns: Name, Trigger Text, Match Criteria, Response Type, and Last Updated. One row is visible with 'Store Location' as the trigger text, 'Exact Match' as the criteria, 'Text' as the response type, and '26-Apr-25 12:17 PM' as the last updated time. A callout circle highlights the three-dot menu icon in the 'Last Updated' column.

Name	Trigger Text	Match Criteria	Response Type	Last Updated
Store Location	Store Location	Exact Match	Text	26-Apr-25 12:17 PM

17 You can edit / delete if needed.

This screenshot is identical to the previous one, but the callout circle now highlights the 'Edit' and 'Delete' buttons that appear in a dropdown menu when the three-dot menu icon is clicked. The 'Edit' button is blue and the 'Delete' button is grey.



That's It. All done.