



dream-genie.ai

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Chat Flows

Complete Manual & Tutorial Guide

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Table of Contents

1. What Are Chat Flows?
2. Getting Started — Your First Flow
3. The Visual Flow Builder
4. The 10 Node Types — Complete Reference
5. Edges & Branching Logic
6. Variables & Interpolation
7. AI Wizard — Generate Flows with AI
8. Pre-Built Templates (16 Templates)
9. Bot-Specific Flows (Multibot)
10. Flow Execution Engine — How It Works
11. Tutorial: Customer Support Bot (Step-by-Step)
12. Tutorial: Lead Qualification Flow
13. Tutorial: Appointment Booking System
14. Advanced Patterns & Tips
15. Troubleshooting
16. Quick Reference Card

1 What Are Chat Flows?

Chat Flows transform your AI chatbot from a freeform Q&A; tool into a **guided conversation engine**. Instead of relying solely on AI to interpret every message, you define a visual conversation tree — a sequence of messages, choices, questions, conditions, and actions that guide visitors through a structured dialogue.

Think of it as building a flowchart for your chatbot. Each step (node) does something specific:

- **Send a message** — greet the visitor, provide info, show instructions
- **Present choices** — clickable buttons the visitor can tap (not just free text)
- **Collect information** — ask for name, email, phone, or any free-text input
- **Call AI** — let the AI generate a contextual response using your custom prompt + collected variables
- **Branch by condition** — route the conversation differently based on what the visitor said
- **Fire webhooks** — send collected data to Zapier, Make, or any external service
- **Hand off to humans** — escalate to your support team when the bot can't help

■ **TIP:** Chat Flows work alongside AI — they don't replace it. AI response nodes let you call your AI provider with a custom prompt that includes all the variables collected during the flow. When a flow ends, the chatbot automatically falls back to normal AI chat.

Use Cases

Use Case	What It Does	Key Nodes
Customer Support	Route issues by category, troubleshoot with AI, escalate when needed	user_choice → ai_response → handoff
Lead Qualification	Collect name, company, budget, timeline → send to CRM	collect_input → user_choice → webhook
Appointment Booking	Date/time/service selection → confirmation	user_choice → collect_input → webhook → end

Use Case	What It Does	Key Nodes
Product Recommender	Ask preferences → AI recommends products	user_choice → ai_response → end
Surveys & Feedback	Rating + NPS + open feedback → webhook	user_choice → condition → collect_input
Onboarding	Welcome new users, set up their account step by step	bot_message → collect_input → set_variable

2 Getting Started

Creating your first flow takes about 3 minutes. Here's the fastest path:

1. Navigate to **AI Chatbot** → **Chat Flows** in your WordPress admin sidebar.
2. Click **Templates** to open the template gallery.
3. Pick a template that matches your use case (e.g., Customer Support Triage).
4. Click **Use Template** — it creates a new flow with all nodes and edges pre-configured.
5. Click **Edit** on the new flow to open the visual builder.
6. Customize the messages, choices, and prompts to match your business.
7. Press **Ctrl+S** (or click **Save**) to save.
8. Back on the flow list, click **Activate** to make it live.
9. Visit your website — the chatbot now follows your flow instead of freeform AI!

■ **NOTE:** Only one flow can be globally active at a time. If you need different flows on different pages, use **Bot-Specific Flows** (see Chapter 9) — each AI Bot can have its own flow.

Alternative: Create from scratch

1. Click **New Flow** on the Chat Flows page.
2. Enter a name (e.g., "Sales Inquiry Flow") and click Create.
3. The visual builder opens with a single **Start** node.
4. Drag nodes from the palette on the right — or double-click the canvas to add nodes.
5. Connect nodes by dragging from one node's output port to another node's input port.
6. Configure each node in the Properties panel on the right.

Alternative: AI Wizard



Click the **AI Wizard** button and describe your flow in plain English: "Build a flow that asks visitors what they need help with, collects their email, and routes billing questions to an agent but answers product questions with AI." The AI generates a complete node-and-edge JSON in seconds.

3

The Visual Flow Builder

The flow builder is a drag-and-drop visual canvas where you design conversation trees. It uses Bezier curve connections between nodes, a properties panel for configuration, and keyboard shortcuts for fast editing.

Canvas Controls

Action	How To
Pan canvas	Click and drag on empty canvas area
Zoom	Mouse scroll wheel (or pinch on trackpad)
Select node	Click on it — properties panel opens on the right
Move node	Drag the node to a new position
Connect nodes	Drag from an output port (bottom/side of node) to an input port (top of target node)
Delete node	Select it and press Delete/Backspace key
Delete edge	Click on the connection line, then press Delete
Save	Ctrl+S (Cmd+S on Mac) or click the  button
AI Wizard	Click  in the toolbar — generates a complete flow from a text description

Builder Layout

- **Top toolbar:** Flow name, Save button, AI Wizard, Zoom controls
- **Center canvas:** The drag-and-drop area where nodes and connections live
- **Right panel:** Node properties — changes based on the selected node type

- **Node palette:** Drag new node types onto the canvas from the palette

Node Colors

Each node type has a distinct color for quick visual identification: **Start** (green), **Bot Message** (blue), **User Choice** (amber), **Collect Input** (pink), **AI Response** (violet), **Condition** (teal), **Set Variable** (gray), **Webhook** (flame), **Handoff** (red), **End** (dark red).

4 The 10 Node Types

■ Start (start)

Every flow begins here. The Start node fires when a visitor sends their first message while the flow is active. It has no configuration — just connect its output to the next node.

■ **TIP:** One flow = one Start node. The engine finds it automatically.

■ Bot Message (bot_message)

Sends a text message from the bot. Use it for greetings, instructions, confirmations, or any static text. Supports **{variable}** interpolation — e.g., "Hi {name}, thanks for reaching out!"

■ **TIP:** Great for welcome messages and transition text between interactive nodes.

■ User Choice (user_choice)

Presents the visitor with **clickable choice buttons** (pill-shaped buttons below the message). Configure a message (e.g., "How can I help?") and a list of choices (e.g., Billing, Technical, Other). Each choice can have its own output port — connect different choices to different branches.

■ **TIP:** Choices render as styled buttons on the frontend, not plain text. Visitors tap to respond.

■ Collect Input (`collect_input`)

Asks the visitor a question and saves their free-text answer to a **variable**. Configure: message, variable name (e.g., "user_email"), and input type (text, email, phone, number). The flow pauses and waits for the visitor to type a response.

■ **TIP:** Use descriptive variable names — they're available in all subsequent nodes via `{variable_name}`.

■ AI Response (`ai_response`)

Calls your AI provider (OpenAI, Anthropic, Gemini) with a custom prompt. The prompt can include `{variables}` collected earlier in the flow. Example: "The customer's issue is: `{issue_description}`. Provide step-by-step troubleshooting."

■ **TIP:** This is where AI and flows work together — structured collection + intelligent response.

■ Condition (`condition`)

Branches the flow based on a variable's value. Configure: variable name, operator (equals, contains, greater_than, less_than, not_equals, is_empty), and comparison value. Has two output ports: ✓ **True** and ✗ **False**.

■ **TIP:** Use conditions to route high-value leads differently, detect emergencies, or personalize responses.

■ Set Variable (set_variable)

Silently sets a variable to a value without any user interaction. Use it to tag conversations (e.g., set "lead_type" to "hot"), initialize counters, or store computed values. The flow auto-advances to the next node.

■ **TIP:** Variables set here are available in all subsequent nodes and in webhook payloads.

■ Webhook (webhook)

Sends all collected variables as a JSON POST to an external URL. Perfect for sending leads to your CRM, creating support tickets, or triggering Zapier/Make automations. The flow continues to the next node without waiting for a response.

■ **TIP:** Webhook payload: {"session_id": "...", "variables": {"name": "John", "email": "..."} }

■ Handoff (handoff)

Escalates the conversation to a human agent. Sends a handoff notification (email, Slack, Discord — depending on your Handoff settings) and displays a message to the visitor. The flow ends after handoff.

■ **TIP:** Configure your handoff channels in AI Chatbot → Settings → Handoff before using this node.

■ End (end)

Terminates the flow and displays a closing message. After an End node, the chatbot falls back to normal AI chat mode. Configure a custom end message with {variables} — e.g., "Thanks {name}! We'll be in touch at {email}."

■ **TIP:** A flow can have multiple End nodes for different outcomes (resolved, escalated, abandoned).

5

Edges & Branching Logic

Edges are the connections between nodes — the arrows that define the conversation path. There are three types of edge behavior:

1. Default Edge (no label)

A simple connection from one node to the next. The flow always follows this edge. Used for linear sequences: Start → Welcome → Ask Name → Ask Email → End.

2. Choice Edge (labeled with the choice text)

Connects a User Choice node to different paths based on which button the visitor clicks. Each choice button gets its own output port. Connect each port to a different branch. Example: "Billing" → billing flow, "Technical" → tech flow, "Other" → general support.

3. Condition Edge (true/false branches)

Condition nodes have exactly two output ports: ✓ (true) and ✗ (false). Connect each to a different continuation of the flow.

■ ■ **WARNING:** If a User Choice node has no specific edge for a choice, the flow uses the first available default edge. Always connect all choices to avoid dead ends.

6

Variables & Interpolation

Variables are the data your flow collects from visitors. They're stored per-session and available throughout the entire flow (and in webhooks).

How Variables Are Set

Source	Example	Variable Name
Collect Input node	Visitor types "John Smith"	name
User Choice node	Visitor clicks "Billing"	Auto-stored as last input
Set Variable node	Silently set lead_type = "hot"	lead_type

Using Variables (Interpolation)

Use `{variable_name}` in any text field — messages, prompts, end messages, webhook URLs. The engine replaces them with the actual values at runtime.

Template Text	Runtime Output
Hi {name}! How can I help?	Hi John Smith! How can I help?
Your issue: {issue_description}	Your issue: My login doesn't work
We'll email {email} within 24hrs	We'll email john@example.com within 24hrs

■ **NOTE:** Variables persist for 1 hour per session (stored as WordPress transients). After that, the flow restarts from the beginning for that visitor.

7

AI Wizard

The AI Wizard generates a complete conversation flow from a plain-English description. It creates all the nodes, edges, positions, messages, and prompts in seconds.

How to Use

1. Open the flow builder (edit any flow, or create a new one).
2. Click the **AI Wizard** button in the toolbar.
3. Describe your flow: "Create a flow that qualifies leads by asking about their budget, team size, and timeline. Route enterprise leads (50+ team) to a sales call booking, and smaller leads to a self-serve demo."
4. Click **Generate** — the AI creates the full flow JSON.
5. The canvas populates with all nodes and connections. Customize as needed.
6. Save with Ctrl+S.

Quick-Idea Chips

The wizard also shows 5 quick-idea chips — pre-written flow descriptions you can click to use immediately. These match common use cases: support triage, lead capture, booking, FAQ, and feedback.

■ **TIP:** The AI Wizard also works from the flow list page (not just the builder). Click **AI Wizard** from the list and it creates a brand-new flow.

8 Pre-Built Templates

dream-genie.ai includes **16 ready-to-use templates** covering the most common chatbot scenarios. Each template comes fully configured with nodes, edges, messages, and AI prompts — just customize the text and activate.

#	Template	Category	Nodes
1	Customer Support Triage	Support	11
2	Lead Qualification	Sales	10
3	Appointment Booking	Booking	10
4	FAQ Navigator	Support	10
5	Product Recommender	E-Commerce	10
6	New User Onboarding	Onboarding	9
7	Restaurant Reservation	Booking	10
8	IT Helpdesk Triage	IT Support	11
9	Feedback & NPS Survey	Feedback	10
10	Real Estate Inquiry	Real Estate	13
11	Event Registration	Events	9
12	SaaS Free Trial Signup	SaaS	9
13	Insurance Quote	Insurance	13

#	Template	Category	Nodes
1 4	Course Enrollment	Education	13
1 5	Order Tracking & Returns	E-Commerce	13
1 6	Healthcare Symptom Checker	Healthcare	14

9 Bot-Specific Flows

With Multibot, each AI Bot can have its own conversation flow. This means visitors on your pricing page can get a lead qualification flow, while visitors on your help center get a support triage flow — all from different bots with different personas.

How to Assign a Flow to a Bot

1. Go to **AI Chatbot** → **AI Bots**.
2. Click **Edit** on the bot you want to configure.
3. In the **Deployment** section, find the **Conversation Flow** dropdown.
4. Select a flow from the list (all flows are shown with their node count).
5. Save the bot.

Resolution Priority

When a visitor sends a message, the engine resolves which flow to use in this order:

1. **Bot-specific flow:** If the current page matches a bot's page rules, and that bot has a flow assigned → use that flow.
2. **Global active flow:** If no bot-specific flow matches → use the globally activated flow (if any).
3. **Normal AI chat:** If no flow is active → freeform AI conversation.

Bot	Page Rules	Flow	Behavior
■ Sales Bot	/pricing, /shop/	Lead Qualification	Lead qual on pricing pages
■ Support Bot	/help/, /contact/	Support Triage	Triage on support pages
■ General Bot	(default)	None	Freeform AI on all other pages

10

How the Flow Engine Works

Understanding the execution engine helps you design better flows and debug issues.

State Machine

Each visitor session has a **flow state** stored as a WordPress transient (1-hour TTL). The state tracks: current node ID, all collected variables, and whether the flow is waiting for input.

Execution Loop

1. Visitor sends a message.
2. Engine checks if a flow is active (bot-specific or global).
3. If the flow is **waiting for input**, the visitor's message is stored as the variable value, and the engine advances.
4. If the flow is **not waiting** (first message), it starts from the Start node.
5. The engine processes nodes in sequence, collecting bot messages and auto-advancing through non-interactive nodes.
6. When it hits an **interactive node** (`user_choice`, `collect_input`), it pauses, sends the message + choice buttons, and waits.
7. Loop protection: maximum 20 nodes per turn (prevents infinite loops).
8. If the flow ends or has no more nodes, the chatbot falls back to normal AI chat.

SSE Streaming Compatibility

SSE (Server-Sent Events) streaming can't send structured choice buttons. When a flow is active, the SSE endpoint returns a special signal that tells the frontend to silently switch to AJAX mode. This happens transparently — visitors don't notice.

11 Tutorial: Customer Support Bot

Let's build a complete customer support flow from scratch. This flow routes visitors by issue type, attempts AI troubleshooting, and escalates to a human when needed.

Step 1: Create the Flow

Go to AI Chatbot → Chat Flows → New Flow. Name it "Customer Support". The builder opens.

Step 2: Add the Welcome Message

Add a **Bot Message** node and connect it to Start. Set the message to: "Hi there! ■ I'm here to help. What can I assist you with today?"

Step 3: Add Issue Categories

Add a **User Choice** node. Set message: "Please select a category:" and choices: [Billing, Technical Issue, Product Question, Other]. Connect it to the Welcome node.

Step 4: Branch by Category

Now create four branches — one per choice:

- **Billing** → Collect Input ("What's the email on your account?", variable: user_email) → Handoff to billing team
- **Technical** → Collect Input ("Describe the issue", variable: issue) → AI Response (troubleshoot based on {issue}) → "Resolved?" User Choice
- **Product Question** → AI Response ("Answer using knowledge base") → End ("Glad I could help!")
- **Other** → Collect Input ("Describe what you need", variable: other_issue) → Handoff to general support

Step 5: Add Resolution Check

After the AI troubleshooting response, add a User Choice: "Did that solve your problem?" with [Yes, thanks!] and [No, I need more help]. Connect "Yes" to an End node and "No" to a Handoff node.

Step 6: Save and Activate

Press Ctrl+S, go back to the flow list, and click Activate. Test it on your website!

12

Tutorial: Lead Qualification

This flow collects visitor information, scores them, and routes hot leads to your sales team.

Flow Structure

Start → Welcome → Collect Name → Team Size (choice) → Budget (choice) → Timeline (choice) → Collect Email → Condition (budget ≥ \$200?) → [True: Set Variable hot_lead=yes → Webhook to CRM → "Our team will call you!"] [False: End with self-serve link]

Key Configuration

Node	Type	Configuration
Get Name	collect_input	variable: name, input_type: text
Team Size	user_choice	choices: Just me, 2-10, 11-50, 50+
Budget	user_choice	choices: Under \$50, \$50-200, \$200-500, \$500+
Timeline	user_choice	choices: This week, This month, 3+ months
Check Budget	condition	variable: budget, contains, "\$200" or "\$500"
Tag Lead	set_variable	variable: lead_type, value: hot
Send to CRM	webhook	URL: https://hooks.zapier.com/your-zap

■ **TIP:** The webhook sends ALL collected variables as JSON: {name, team_size, budget, timeline, email, lead_type}. Your Zapier/Make workflow receives everything needed to create a CRM contact.

13

Tutorial: Appointment Booking

Build a booking flow that collects service type, preferred date/time, and contact info, then sends a booking request via webhook.

Flow Structure (9 nodes)

1. **Start** → auto-advance
2. **Bot Message**: "I'd love to help you book an appointment! Let me get a few details."
3. **User Choice (Service)**: "What service?" → [Consultation, Follow-up, New Patient, Other]
4. **Collect Input (Date)**: "What date works best?" → variable: preferred_date
5. **User Choice (Time)**: "Preferred time?" → [Morning 9-12, Afternoon 12-3, Evening 3-6]
6. **Collect Input (Name)**: "Name for the appointment?" → variable: name
7. **Collect Input (Phone)**: "Phone number to confirm?" → variable: phone
8. **Webhook**: POST to your booking API or Zapier
9. **End**: "You're all set, {name}! We'll text {phone} to confirm your {preferred_date} appointment."

14 Advanced Patterns & Tips

Pattern: Loop-Back for Retries

Connect a "Tell me more" choice back to the AI Response node — creating a loop where visitors can keep asking questions until they're satisfied. Add a "Done" choice that exits to an End node.

Pattern: Conditional AI Prompts

Use a Condition node before an AI Response to route to different AI prompts. A VIP customer gets a more detailed, personalized response, while a free-tier user gets a shorter answer.

Pattern: Multi-Webhook Pipeline

Chain multiple Webhook nodes: first sends to your CRM, second sends to Slack, third triggers an email. Each webhook fires in sequence and the flow continues.

Pattern: Language Detection

Start with a User Choice: "■■ English / ■■ Español / ■■ Français". Branch to different flows with localized messages and AI prompts in the chosen language.

Performance Tips

- Keep flows under 30 nodes — visitors lose patience with long sequences
- Put the most common choice first — it reduces clicks for the majority
- Use AI Response nodes sparingly — each one calls your AI API (costs tokens)
- Always provide an escape path ("Other" choice or "Talk to a person" option)
- Test your flow end-to-end before activating — walk through every branch

15

Troubleshooting

Problem	Cause	Fix
Choice buttons don't appear	SSE streaming active	The plugin auto-falls back to AJAX. If buttons still missing, check browser console for JS errors.
Flow doesn't start	Flow not activated	Go to Chat Flows list and click ■ Activate.
Flow starts for wrong bot	Bot page rules overlap	Check bot page rules — more specific patterns should be on more specific bots.
Variables are empty	Wrong variable name	Ensure {variable_name} matches exactly what's in the Collect Input node.
Webhook not firing	Webhook URL invalid	Test the URL with a tool like webhook.site first.
Flow loops forever	Circular edge connections	Check for edges that point back to earlier nodes unintentionally. Max 20 steps per turn.
AI Response is empty	No API key configured	Ensure you have an active API key in Settings → API Keys.
Bot ignores the flow	Bot has no flow assigned	Edit the bot → Deployment → Conversation Flow dropdown.

16

Quick Reference Card

Keyboard Shortcuts

Key	Action
Ctrl+S / Cmd+S	Save flow
Delete / Backspace	Delete selected node or edge
Click + drag (canvas)	Pan the canvas
Scroll wheel	Zoom in/out
Click node	Select and show properties

Node Type Cheat Sheet

Node	Waits?	Auto-advances?	Has Output Ports?
Start	No	Yes	1 (default)
Bot Message	No	Yes	1 (default)
User Choice	Yes (buttons)	No	1 per choice + default
Collect Input	Yes (free text)	No	1 (default)
AI Response	No (API call)	Yes	1 (default)
Condition	No	Yes	2 (true + false)
Set Variable	No	Yes	1 (default)
Webhook	No	Yes	1 (default)

Node	Waits?	Auto-advances?	Has Output Ports?
Handoff	No (terminates)	No	None
End	No (terminates)	No	None

Variable Interpolation Syntax

Use `{variable_name}` in any text field. Works in: Bot Message, User Choice message, Collect Input message, AI Response prompt, End message, and Webhook URL.

Menu Location

WordPress Admin → AI Chatbot → ■ Chat Flows

■ **TIP:** Need more help? Visit dream-genie.ai/docs or join our Discord community for live support.