

FILE 2 OF 5

CAdocbot Setup Guide

10-Step Installation — Interakt & AiSensy

WHAT YOU WILL NEED

- Google account (for Drive + Sheets)
- Make.com account — free tier is sufficient (1,000 ops/month)
- WhatsApp Business API access via Interakt OR AiSensy (free trial available)
- ChatGPT (Plus/Team) for Custom GPT, or Anthropic API key for Claude
- About 3–4 hours for first-time setup

TIME ESTIMATE PER STEP

Step	Task	Time
1	Google Drive folder structure	20 min
2	Google Sheet setup	15 min
3	Upload first documents	20 min
4	WhatsApp Business account (Interakt)	30 min
4B	Alternative: AiSensy setup	30 min
5	Make.com account + blueprint import	20 min
6	Connect Make.com to Google Sheets	15 min
7	Connect Make.com to Interakt/AiSensy	15 min
8	Configure the AI system prompt	20 min
9	Test end-to-end with your own number	20 min
10	Go live with first client	10 min

STEP 1

Create the Google Drive folder structure

Applies to: Interakt & AiSensy

1. Open Google Drive (drive.google.com) and create a root folder named: **CAdocbot Clients**
2. Inside it, create one subfolder per client. Name format: **PAN_ClientName** e.g. AAAPB1234C_Priya Bose
3. Inside each client folder, create category subfolders: **GST Returns, Income Tax, TDS Certificates, ROC Filings, Financials, Payroll, Registrations**
4. Inside each category folder, create year/period subfolders e.g. **2024-25, AY 2024-25, Permanent**
5. Right-click each year folder → Share → Anyone with the link → Viewer. Copy the share link — you will paste it into the Sheet.

■ Full folder tree is in File 4 (4_Drive_Folder_Structure.txt).

STEP 2

Set up the Google Sheet

Applies to: Interakt & AiSensy

1. Download **3_Google_Sheet_Template.csv** (File 3 in this package).
2. Open Google Sheets → File → Import → Upload the CSV. Choose 'Replace spreadsheet'.
3. Rename the tab to **Clients**. Then add three more tabs: **Documents, AuditLog, Feedback** — import the other three CSVs into each.
4. Note the Sheet ID from the URL: docs.google.com/spreadsheets/d/[**SHEET_ID**]/edit — you will need this in Step 6.
5. Share the Sheet with your Make.com Google account (or use a service account).

■ Keep sample rows for reference — delete them after testing.

STEP 3

Upload your first documents

Applies to: Interakt & AiSensy

1. For each document: download from the government portal (GST Portal / IT Portal / MCA), rename using the convention: **DocType_Period.pdf** e.g. GSTR-3B_Mar2025.pdf
2. Upload to the correct Drive folder: Client → Category → Year.
3. Get the file's shareable link: right-click → Get link → Anyone with the link → Viewer → Copy link.

4. Open the Documents sheet and add a row: DocID (auto-increment), ClientID (matching Clients sheet), Category, SubCategory (e.g. GSTR-3B), Period (e.g. Mar 2025), FileName, DriveLink (paste here), UploadDate, UploadedBy.

■ *Free tier: maximum 3 documents per category per client.*

STEP 4

Create a WhatsApp Business API account — Interakt

Applies to: Interakt only

1. Go to interakt.ai → Sign up → Select 'WhatsApp Business API'.
2. Connect your WhatsApp Business number (you will need a phone number not already on personal WhatsApp).
3. Complete Facebook Business Manager verification — takes 1-2 business days.
4. Once approved, navigate to **Settings** → **API Keys** and copy your API key.
5. Create a new Flow in Interakt: Settings → Flows → New Flow → Name it 'CAdocbot'. Set trigger to 'Incoming message'.
6. Set the Flow to send an HTTP request to your Make.com webhook URL (you will get this in Step 5).

■ *Interakt free tier: 1,000 conversations/month. Sufficient for up to 50 active clients.*

STEP 4B

Alternative: Create a WhatsApp Business API account — AiSensy

Applies to: AiSensy only

1. Go to aisensy.com → Get Started → WhatsApp Business API.
2. Connect your WhatsApp number and complete Meta Business verification.
3. Once active: Dashboard → Settings → API → copy your API key and Phone Number ID.
4. In AiSensy: Campaigns → Chatbot → New Chatbot → set trigger 'Any incoming message' → action: Webhook → paste your Make.com webhook URL.
5. In the Make.com blueprint (Step 5), swap Module 1's HTTP URL for AiSensy's send message endpoint: **<https://backend.aisensy.com/campaign/t1/api/v2>**

■ *AiSensy free tier: 1,000 messages/month. For higher volume, upgrade to their starter plan.*

STEP 5

Set up Make.com and import the blueprint

Applies to: Interakt & AiSensy

1. Sign up at make.com → free plan is sufficient.
2. Go to **Scenarios** → **Create a new scenario**.

3. Click the three-dot menu → **Import Blueprint** → upload **5_Makecom_Blueprint.json** (File 5 in this package).

4. You will see 10 modules appear. Click the first module (Webhooks) → it will give you a **webhook URL** — copy it.

5. Paste this webhook URL into your Interakt Flow (Step 4) or AiSensy Chatbot (Step 4B).

■ *Do not activate the scenario yet — complete Steps 6 and 7 first.*

STEP 6

Connect Make.com to Google Sheets

Applies to: Interakt & AiSensy

1. In the blueprint, click **Module 2** (Google Sheets — Search Rows — Clients).
2. Click 'Create a connection' → sign in with your Google account → Allow access.
3. Set **Spreadsheet ID** to your Sheet ID from Step 2. Set **Sheet Name** to 'Clients'. Set **Filter**: Column A (WhatsApp) equals {{1.sender_phone}}.
4. Repeat for Module 5 (Google Sheets — Search Rows — Documents): same Spreadsheet ID, Sheet Name = 'Documents', Filter: Column B (ClientID) equals the ID returned from Module 2.
5. Set Module 9 (Add Row) to AuditLog sheet, Module 10 (Add Row) to Feedback sheet.

■ *Test each module individually using the 'Run once' button before full activation.*

STEP 7

Connect Make.com to Interakt (or AiSensy)

Applies to: Interakt & AiSensy

1. Click **Module 7** (HTTP — Send WhatsApp Message).
2. **Interakt**: URL = https://api.interakt.ai/v1/public/message/, Method = POST, Headers: Authorization = Basic [YOUR_API_KEY], Content-Type = application/json.
3. Body (JSON): { "countryCode": "+91", "phoneNumber": "{{sender_phone}}", "callbackData": "CAdocbot", "type": "Text", "data": { "message": "{{doc_link_message}}" } }
4. **AiSensy**: URL = https://backend.aisensy.com/campaign/t1/api/v2, use apiKey and phone from your AiSensy settings.
5. Click Module 8 (feedback request message) — same HTTP setup, different message body.

■ *Keep your API key secret — do not share the Make.com scenario publicly.*

STEP 8

Configure the AI system prompt

Applies to: Interakt & AiSensy

1. Open **1_System_Prompt.pdf** (File 1). Copy the full prompt from the horizontal rule onward.
2. **For ChatGPT Custom GPT:** platform.openai.com → My GPTs → Create → Configure → paste into 'Instructions'. Enable 'Code Interpreter' off, 'Web Browsing' off.
3. **For Claude via API:** In Module 3 of the Make.com blueprint (HTTP — Claude API), set the 'system' field to the copied prompt. Add your Anthropic API key in the Authorization header: x-api-key: [YOUR_KEY].
4. Replace all placeholders in the prompt: [FIRM NAME], [PHONE], [EMAIL], [PRO URL].
5. Map Make.com variables into the prompt's {{variables}}: {{sender_phone}}, {{client_record}}, {{client_name}}, {{client_tier}}, {{doc_list}}.

■ *The system prompt is the brain of the bot — take time to test each branch before going live.*

STEP 9

Test end-to-end with your own number

Applies to: Interakt & AiSensy

1. Add your own WhatsApp number to the Clients sheet as a test client (tier = Free).
2. Add 2-3 test documents in the Documents sheet with real (or dummy) Drive links.
3. Activate the Make.com scenario (toggle to ON).
4. Send 'Hi' from your WhatsApp to your business number — the bot should greet you by name.
5. Navigate through the menu: select a category → select a period → confirm a Drive link is returned.
6. Test the Free tier limit: try requesting a Pro-only category — confirm the upgrade message appears.
7. Check the AuditLog and Feedback sheets — rows should be added after each interaction.
8. Deactivate the scenario after testing (set back to OFF) until you are ready for clients.

■ *Run at least 10 test conversations covering: valid client, invalid number, missing doc, Free limit hit, feedback skip.*

STEP 10

Go live with your first client

Applies to: Interakt & AiSensy

1. Add the client to the Clients sheet (Status = Active, Tier = Free).
2. Upload their documents to Drive and add rows to the Documents sheet.
3. Activate the Make.com scenario.
4. Send the client a simple WhatsApp introduction: 'Hi [Name], you can now get your documents from our office WhatsApp 24/7. Just send us a message to get started.'
5. Monitor the AuditLog sheet for the first few days — confirm documents are delivered correctly.
6. After 5 clients are active, you will hit the Free tier limit. Visit rmaaca.in/cadocbot-pro to unlock unlimited clients.

■ *Congratulations — CAdocbot is live!*
