

MARCH 2021

# SymBot Starter Guide



Meet SymBot—Symphony’s very own bot that helps users stay up-to-date with targeted community events, product updates, use cases, and more!

## Connecting to SymBot

1. Search for “SymBot” in the Global Search Bar
  - SymBot will be listed as an external user
2. Send a connection request to the bot to automatically connect
3. The SymBot will send you a message with guidance on how to leverage the bot
4. You are now ready to receive 1:1 updates from SymBot!

You can also interact with SymBot in a new or existing chat room:

## Adding SymBot to a New Chat Room

1. Select the ‘+’ symbol at the top of your left navigation bar
2. Create an **external** chat room
3. Add desired members including “SymBot”
  - Note: The chat will appear to be external when the SymBot is added to a chat
4. You are now ready to receive updates from SymBot in your new chat room!

## Adding SymBot to an Existing Chat Room

1. Select the information icon in an **externally enabled** chat room you’d like to add SymBot to
2. Under ‘Members’, select ‘+ Add Members’
3. Add “SymBot”
4. You are now ready to receive updates from SymBot in your chat room!

## How to Use SymBot

Send **@SymBot** into a chat with SymBot to select from the following options:

**Subscribe:** Sign up for recurring Symphony communications. Select what content you’d like to receive from SymBot in a chat room or in a 1-1 chat with the bot:

- **Events & Training:** Innovate conference, webinars, user training, tips and resources
- **Community News:** Community and product announcements, external bots and workflows
- **Developer Updates:** Developer resources, training, and events

**Firms:** See firms and partners using Symphony

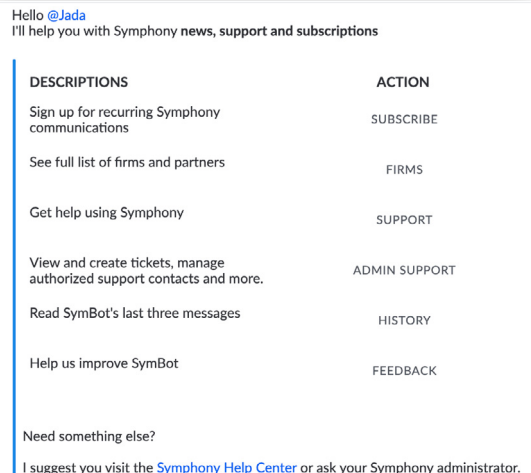
**Support:** Get help using Symphony

**Admin Support:** View and create tickets, manage authorized support contacts and more

**History:** Read SymBot’s last three messages sent in the chat

**Feedback:** Help us improve your SymBot experience

**Disclaimer:** SymBot is an interactive bot that is only available to users that are externally enabled



Hello @Jada  
I'll help you with Symphony news, support and subscriptions

DESCRIPTIONS	ACTION
Sign up for recurring Symphony communications	SUBSCRIBE
See full list of firms and partners	FIRMS
Get help using Symphony	SUPPORT
View and create tickets, manage authorized support contacts and more.	ADMIN SUPPORT
Read SymBot's last three messages	HISTORY
Help us improve SymBot	FEEDBACK

Need something else?  
I suggest you visit the [Symphony Help Center](#) or ask your Symphony administrator.