

Client portal

User's Guide

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1 Terms and Acronyms

Term	Definition
API	Application programming interface. The interface that controls the System functionality on the client side and is integrated with the client's systems.
Broadcast	One-way or two-way messaging campaign. In the latter case, it can be with a chatbot or a live person.
Client	A company or a private entrepreneur registered in the System that communicates with recipients from its own contacts database.
Communication channel	Channel available to users through the System interfaces that is used to deliver messages to recipients (SMS, WhatsApp, RCS etc.)
CTA	Call-to-action, a prompt on a button, message text or elsewhere that encourages the user to take some action such as call, visit the website etc.
Fallback	A way of sending messaging campaigns that allows redirecting a message to an alternative channel if it is not delivered through the initial channel within a predefined time period. The succession of channels and statuses that must be received for a message to be treated as delivered are configured by the user when setting up a campaign (broadcast).
MNO	Mobile network operator
OCS	Online charging system
RCS	Rich Communication Service, a communication protocol between mobile telephone carriers that is designed to replace traditional SMS messages and enables the exchange of video, audio, images and image carousels, group chats and other features.
RCS business messaging	Service that enables communication of businesses and their subscribers by way of RCS (in other words, A2P RCS).
RCS capability check	Broadcast launched to ascertain whether the target device supports RCS messaging features.

Term	Definition
Sender ID	Alphanumeric sender identifier in a channel. It is set when creating a broadcast. Normally it coincides with the name of the brand that performs the communication.
Session	A series of messages grouped by certain criteria for billing purposes. A session can be defined by its length, direction of the initial message, the number of messages etc.
System owner	Owner of the platform, a service provider that operates the System and connects clients (companies) that communicate with end-users.

2 System overview

The System is an omnichannel business messaging platform for brands and businesses. It allows businesses of any size and kind to talk with their customers through various communication channels.

The System allows communication:

- that can be initiated by the brand or the user;
- in regular SMS as well as through a variety of instant messengers;
- as a dialog with a chatbot or live operator or one-way interaction.

In other words, the System is a service delivery platform that offers its customers a versatile tool for interaction with end users by SMS and messengers.

Key benefits of the System include:

- Intuitive, top-notch interface with a rich set of instruments;
- Support of a variety of IM channels; new channels can be easily added;
- Feature rich Chatbot engine;
- Multichannel messaging campaigns (broadcasts);
- Operator workstation (chat panel) with support for all channels;
- In-depth analytics;
- Flexible rate plans;
- Integration with internal systems (such as CRM);
- No special skills needed to start working with the System - only basic computer competency.

2.1 System interfaces

The System consists of two interfaces:

- Client portal that serves for conversations and broadcasts.
- BackOffice: the admin interface that serves to configure all that is needed for operation of the System: System users, companies and their legal entities, manage invoices and payments etc.

NOTE: Both System interfaces operate in Google Chrome and Mozilla Firefox browsers. Operation in other browsers is possible but not guaranteed.

3 Client portal use case examples

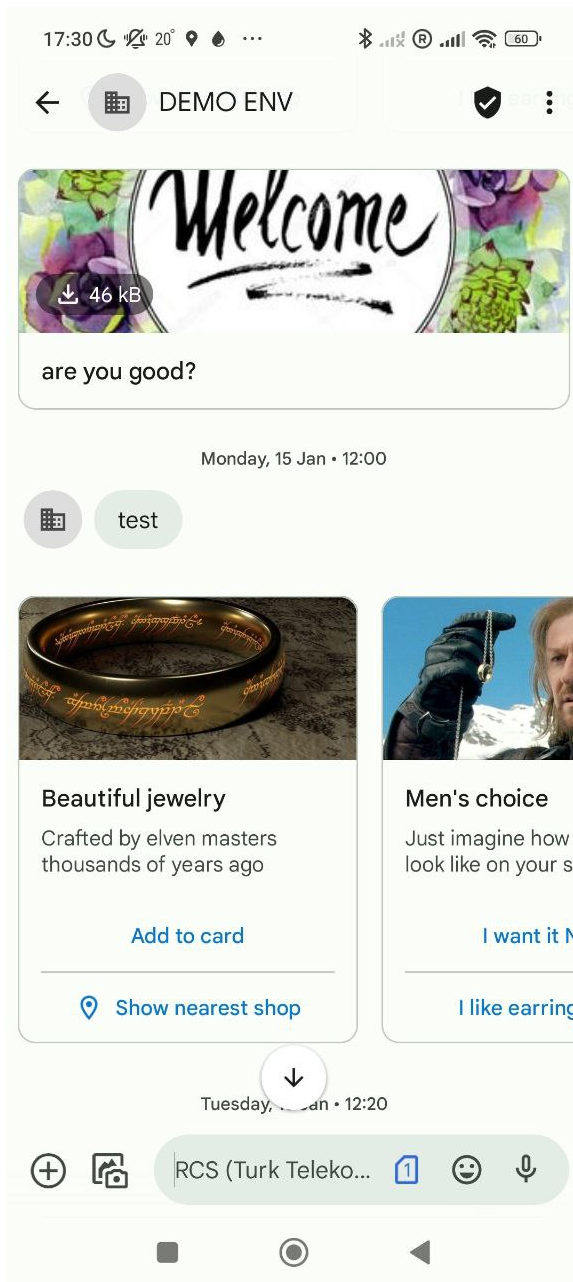
Typical use cases are illustrated below:

Customer care:

- Responding to customer requests;
- Reminding of a scheduled visit;
- Booking an appointment.

Marketing:

- Targeted advertising messages;
- Cross-selling to the existing customer base.



Client portal use example (conversation)


4 Access to the Client portal

To access your Client portal, open the link to the System's web interface and enter your login and password in the appropriate fields.

NOTE: For the login and password, contact your System supplier.

Welcome back, log in to your account

Login


Password 

Remember me [Forgot password?](#)

[Sign in](#)

Do not have an account yet? [Register](#)

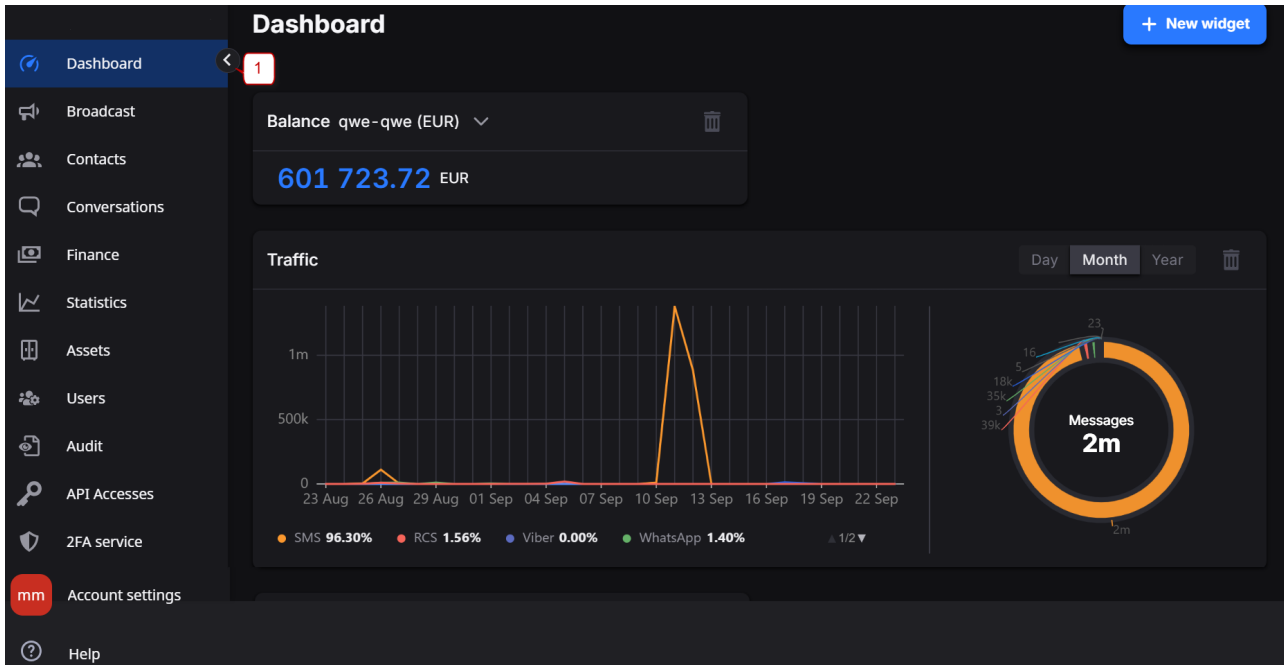
[Select language](#)

English 

Client portal login panel


5 Interface structure

The Client portal interface is web-based; no other software installation is required. It is designed to work on the majority of modern browsers.



Dashboard

After logging in the interface, the user sees the [Dashboard](#) ¹⁵ page with charts and statistics of the System operation.

The panel on the left is the System menu. To toggle between the icons only and icons & text view, hover over the panel edge and click the  button (see "1" in figure above).

The menu contains the following items:

- [Dashboard](#) ¹⁵: charts and statistics of the System operation;
- [Broadcast](#) ²⁵: page that serves to create and manage messaging campaigns;
- [Contacts](#) ⁸⁰: section that serves to store and manage the contacts database;
- [Conversations](#) ¹⁰¹: serves to create two-way conversations with a human operator or chatbot;
- [Finance](#) ¹³⁴: contains invoices, payment details and rate plans;
- [Statistics](#) ¹³⁸: shows statistic reports and EDRs;
- [Assets](#) ¹⁴²: stores the media database, sender IDs, content and WhatsApp templates;
- [Users](#) ¹⁷⁷: serves to create and edit user accounts in the System;
- [Audit](#) ¹⁸⁶: log of System user actions;
- [API Accesses](#) ¹⁸⁷: serves to generate API keys to enable interconnection with third-party systems;
- [2FA Service](#) ¹⁹⁰: serves to configure two-factor authentication services;



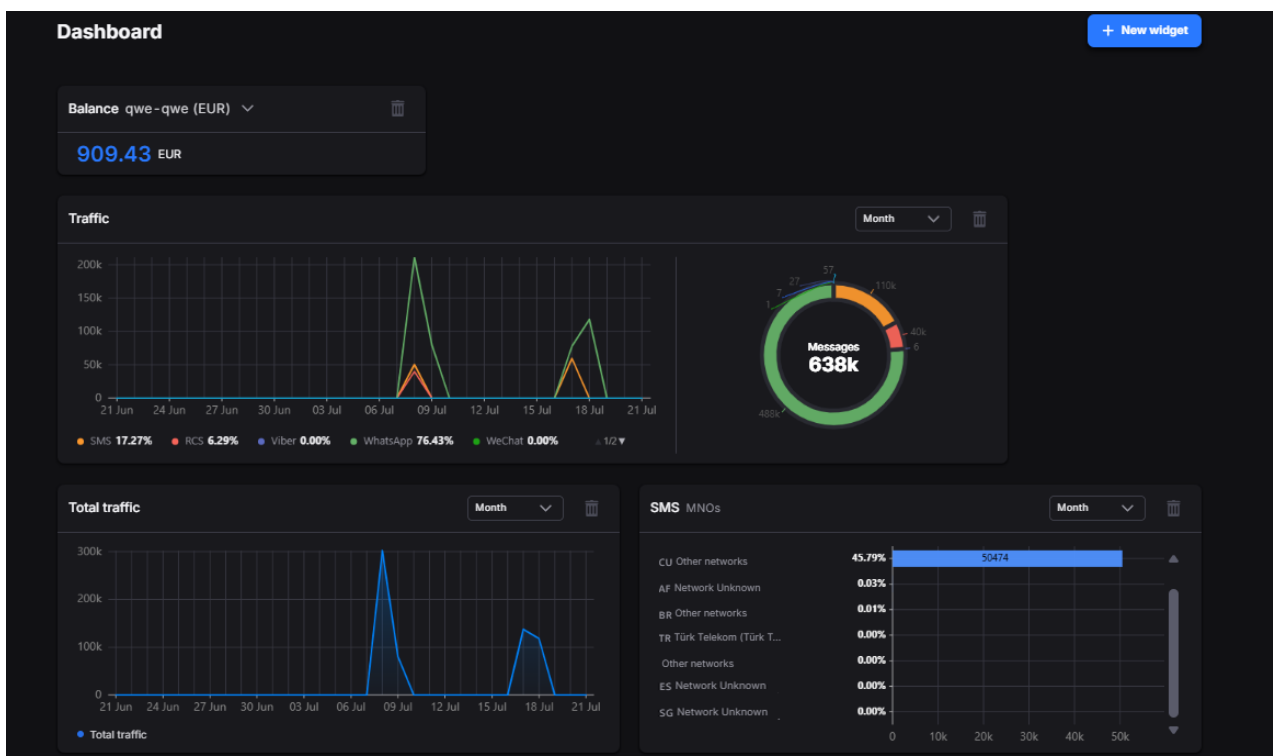
Interface structure

- [Account settings](#)¹⁹⁴: serves to view and edit the user account properties;
- *Help*: a pop-up window designed for a seamless access to documentation and communication with the technical support of an upper-level reseller.

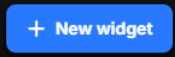
6 Dashboard

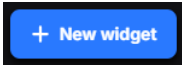
The *Dashboard* page provides a set of automatically updated widgets with graphs and statistics offering an overview of broadcasts, contact base, balance and traffic stats. The following widgets are currently available:

- *Balance;*
- *Traffic;*
- *SMS;*
- *RCS;*
- *WhatsApp;*
- *Viber;*
- *WeChat;*
- *Email;*
- *Push;*
- *TTS;*
- *Broadcasts.*

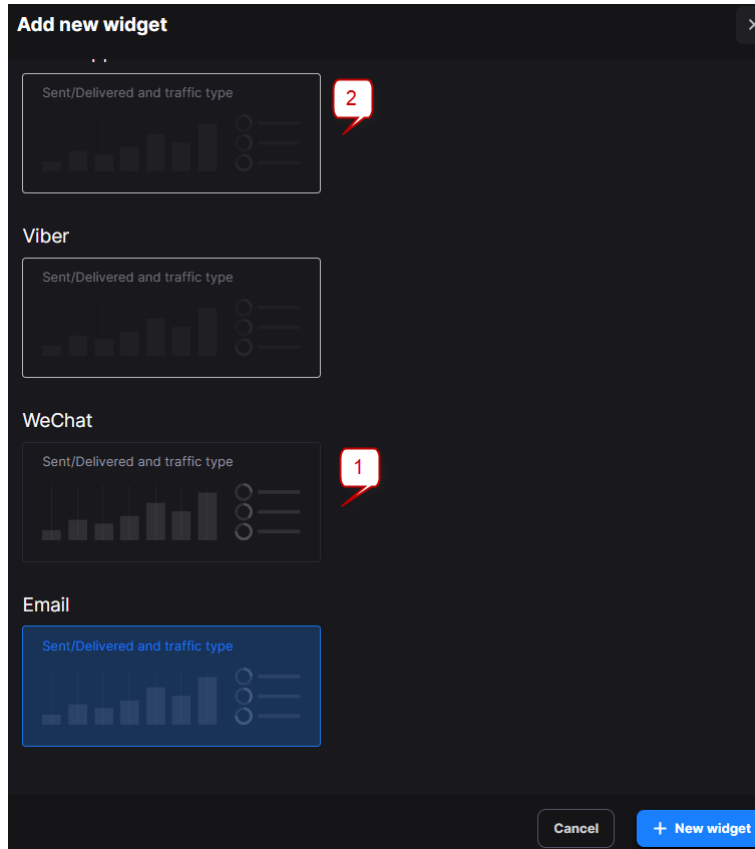


Dashboard overview

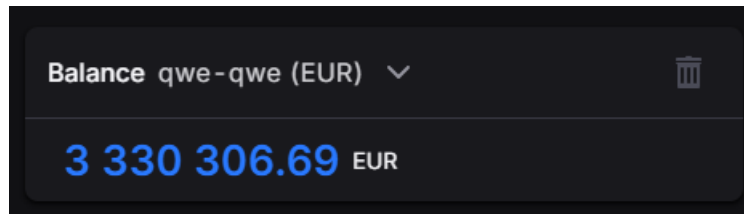
Widgets can be organized on the page by using drag & drop. To remove a widget, click . To bring it back or add another widget, click *New Widget* . In the panel that appears select the widget and



click the *New Widget* button at the bottom of the page. The button becomes active only when a widget is selected. In the figure below, (1) is a widget that can be added, (2) is a widget that is already displayed in the *Dashboard*. Please note that the added widget will appear at the bottom of the page. To move it to the desired position, use drag & drop.



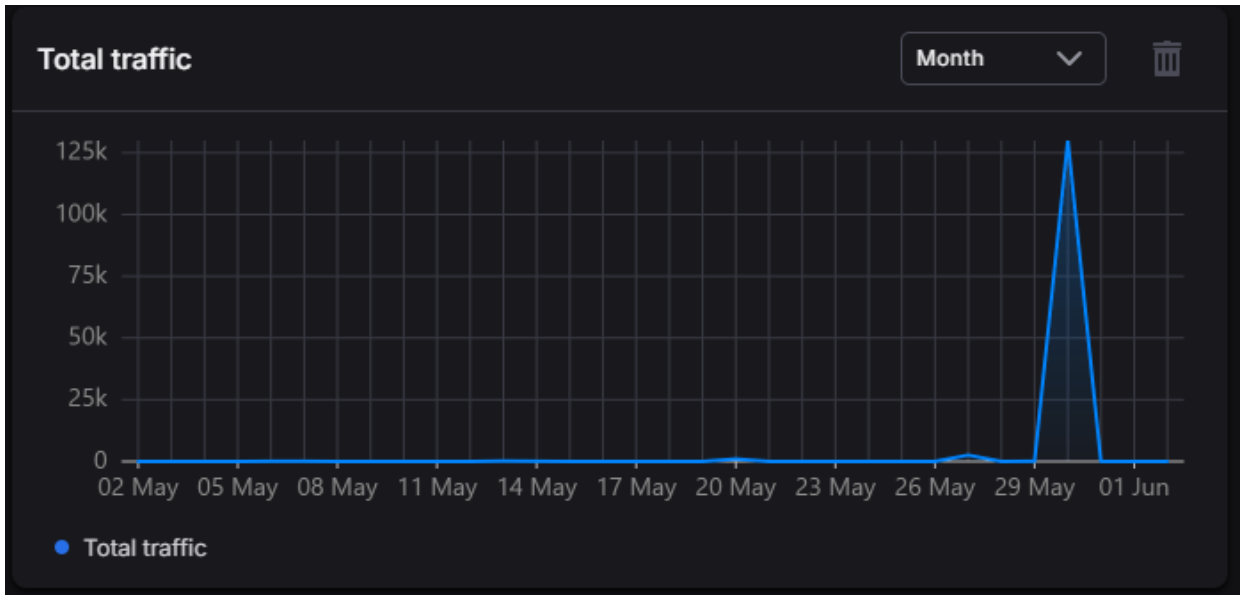
Adding a new widget



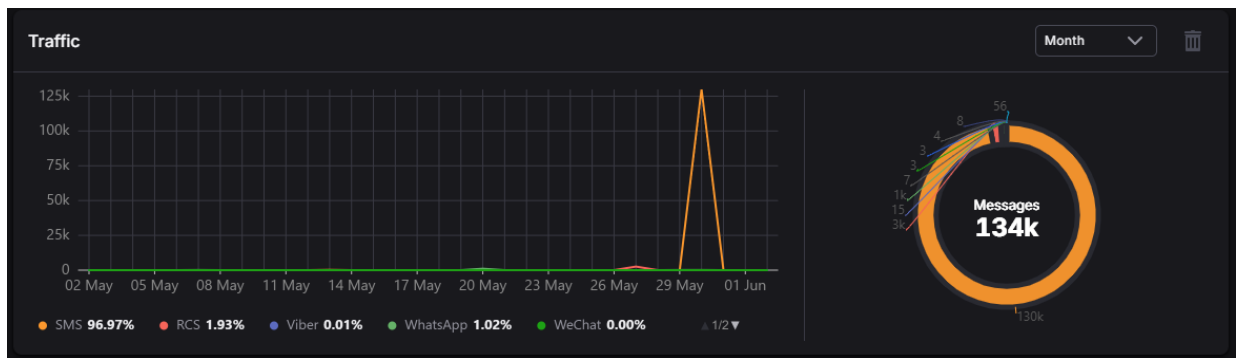
Balance widget

The *Balance* widget is illustrated in the figure above.

The System has two *Traffic* widgets - one displays the total traffic and the other - the traffic broken down by channel. The drop-down list at the top right corner of each widget serves to select the period to display - *Day*, *Month* or *Year*.

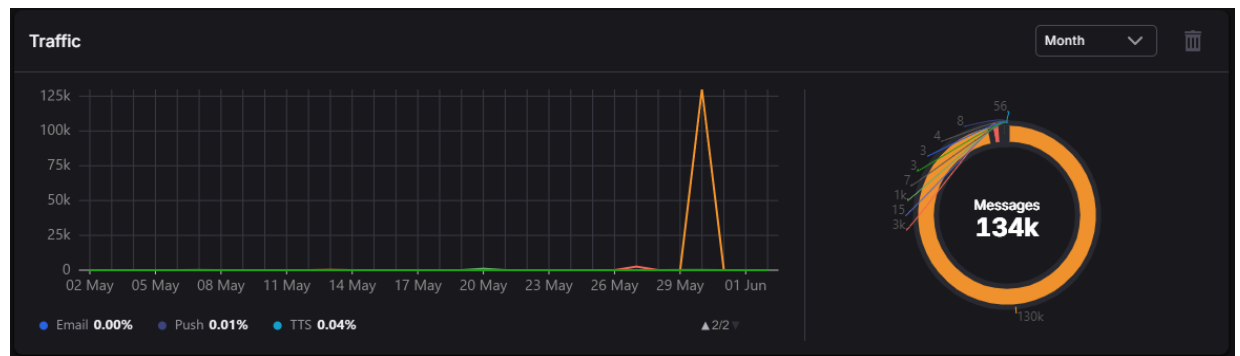


Total traffic widget



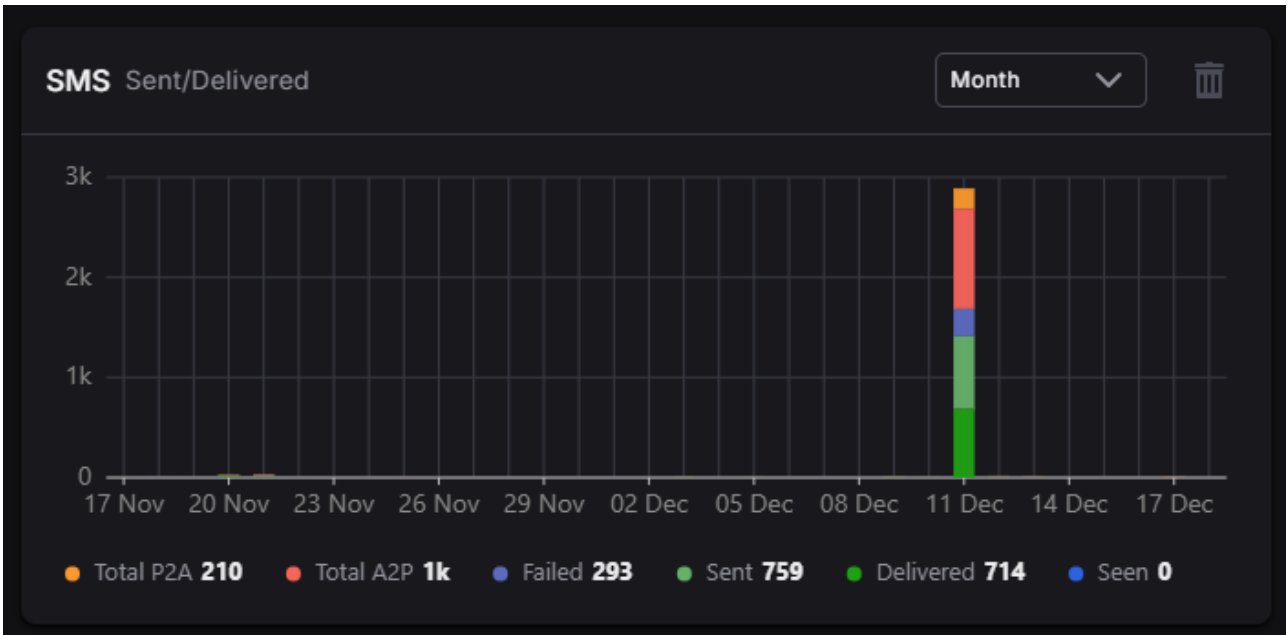
Traffic widget (1)

Hover over the widget and click the [dropdown arrow] button to view the traffic for *Email*, *Push* and *TTS (Text-To-Speech)* channels.



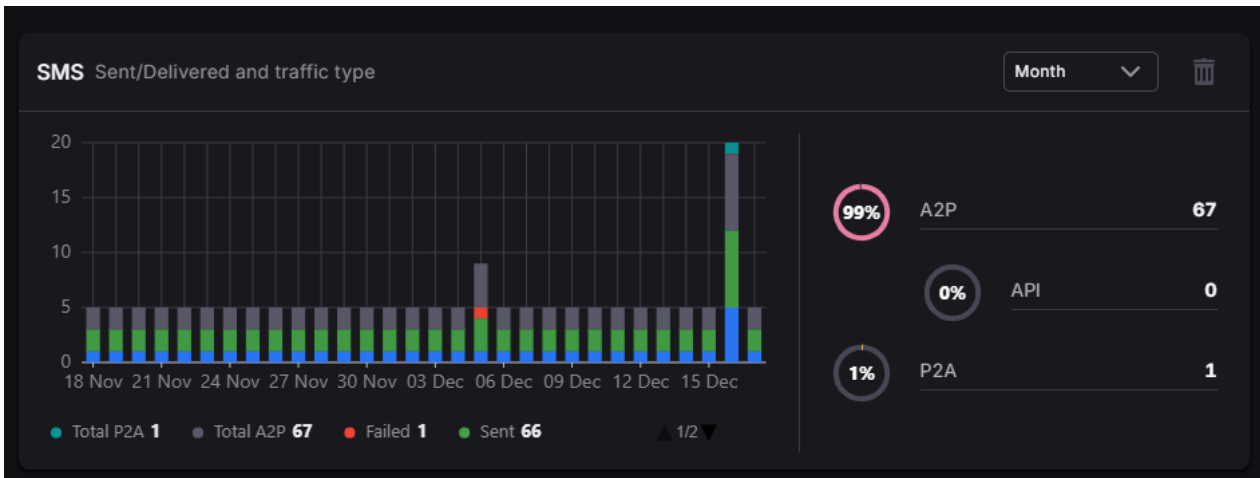
Traffic widget (2)

The System has the following SMS widgets: *Sent/Delivered*, *Sent/Delivered & traffic type*, *MNOs* and *Countries*.



SMS Sent/Delivered widget

1.13.0 The *SMS Sent/Delivered* widget shows the chart of sent and delivered SMS for the selected period (day, month or year). Hover over the segments to toggle the stats on each period.

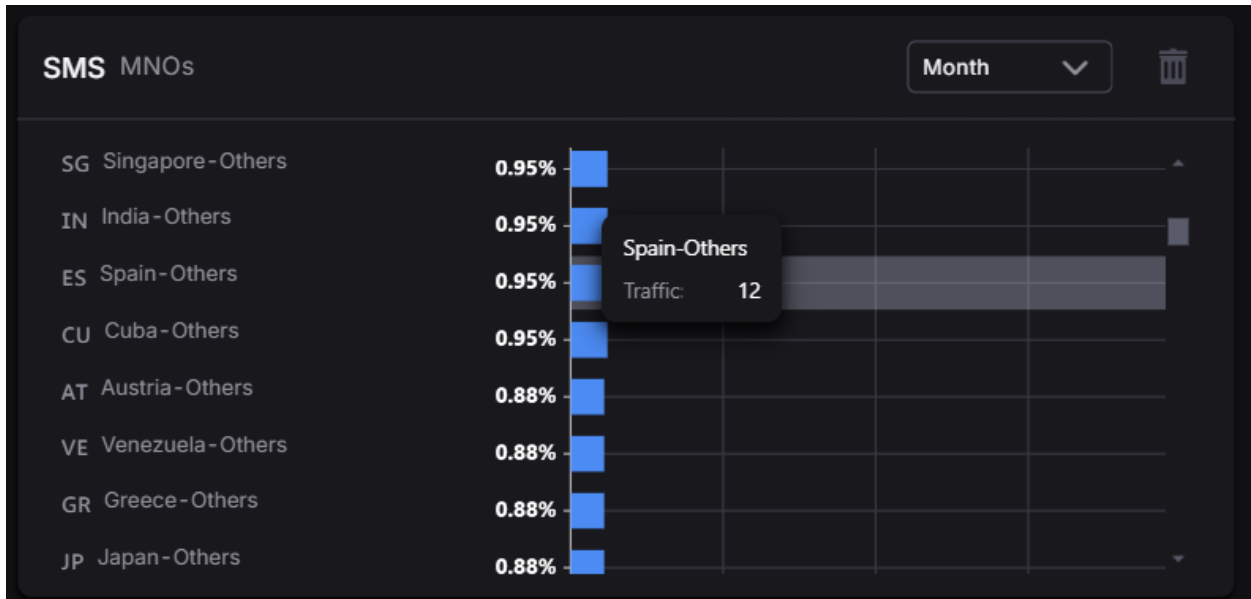


SMS Sent/Delivered & traffic type widget

1.13.0 The *SMS Sent/Delivered & traffic type* widget shows the same data as the previous widget plus a breakdown by traffic type:

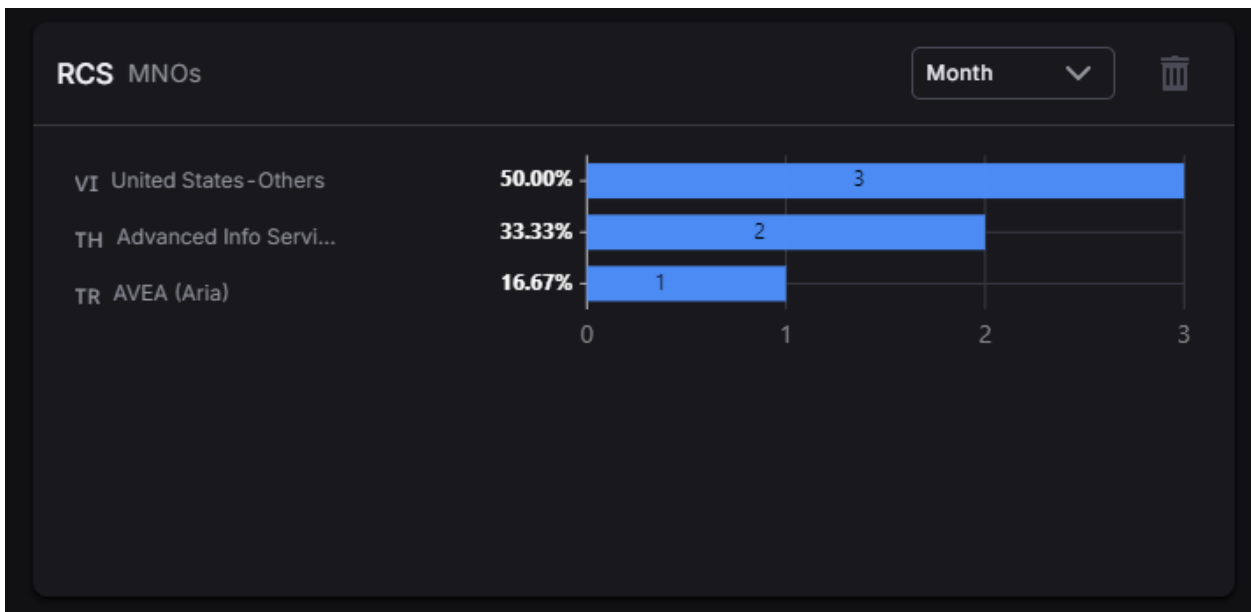
- *A2P (Application-to-Person)*: messages sent from the System to the contact.
- *API*: a subset of A2P (MT) messages sent via an API, not via Broadcasts, Chatbot, or Conversations sections.
- *P2A (Person-to-Application)*: messages sent by the contact (e.g. from a messenger) to the System.

Hover over the segments to toggle the stats on each period.

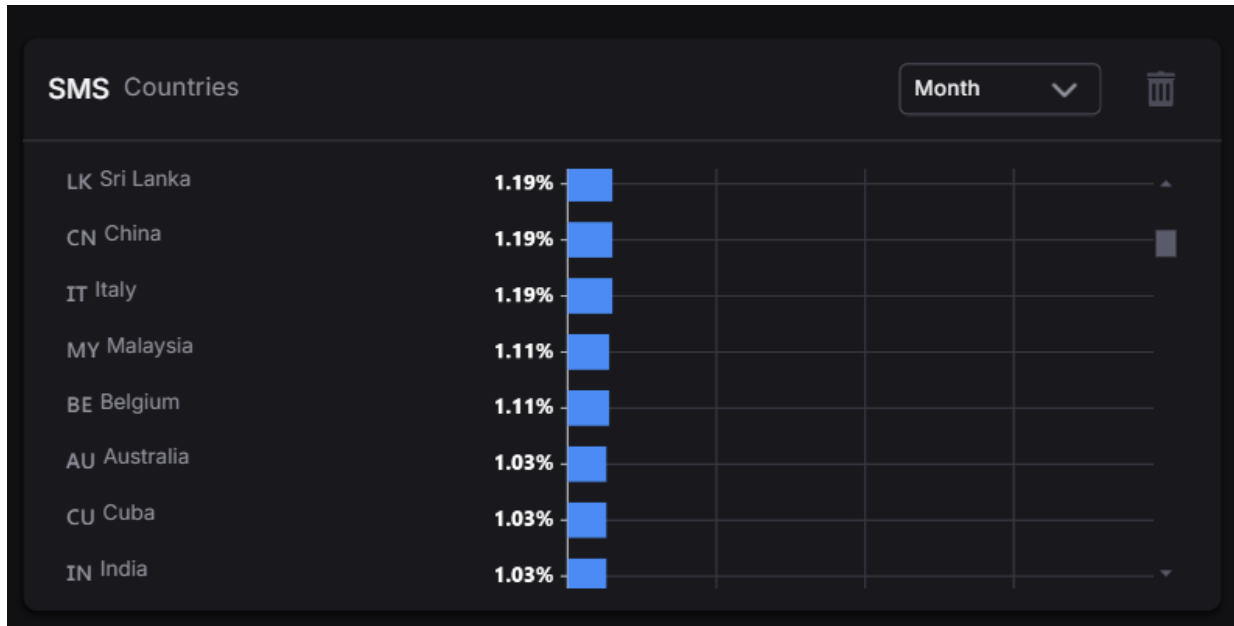


SMS MNOs widget

The SMS MNOs widget shows the number of SMS by mobile network operator (MNO) for the selected period (day, month or year). A similar widget is available for RCS (see figure below).

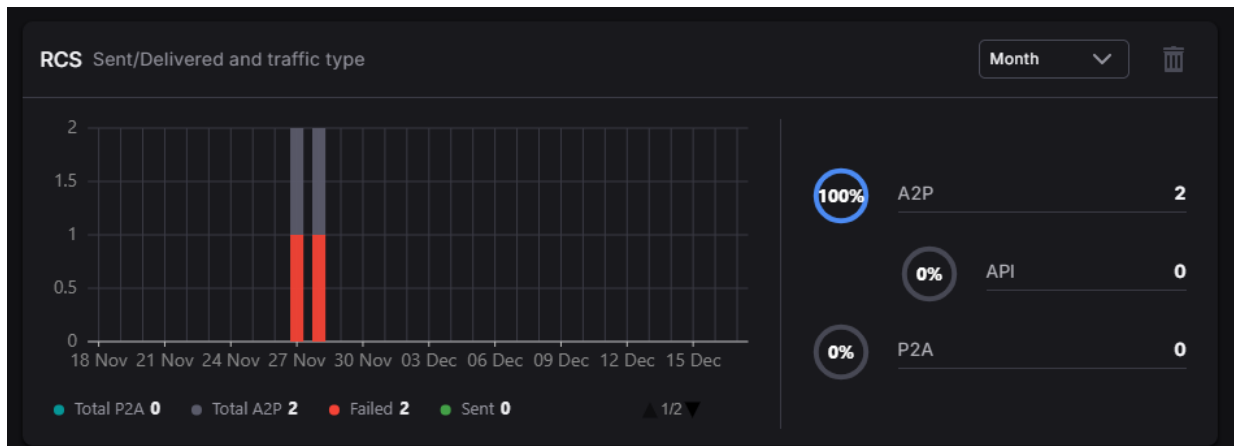


RCS MNOs widget



SMS countries widget

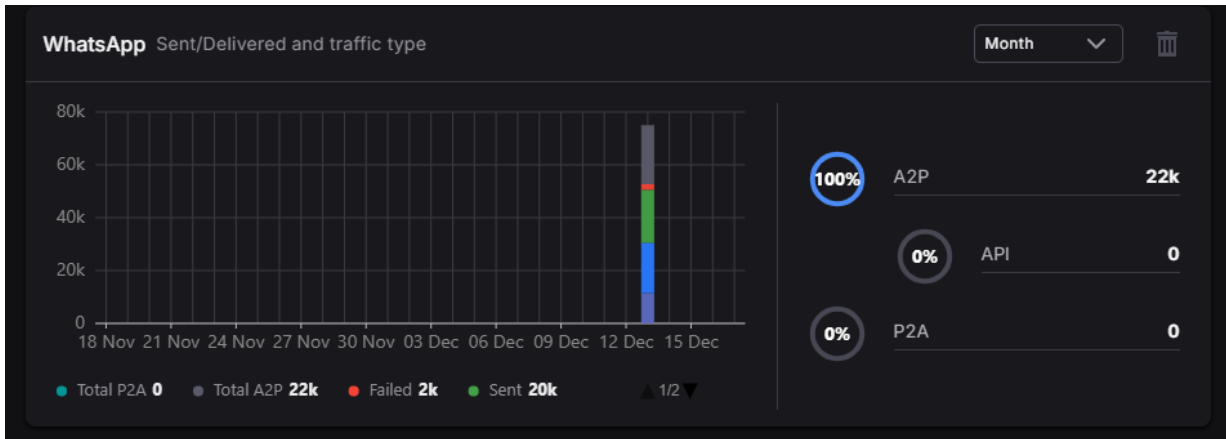
The *SMS Countries* widget shows the number of SMS by country for the selected period (day, month or year).



RCS Sent/Delivered and traffic type widget

The *RCS Sent/Delivered and traffic type* widgets shows the number of messages sent through the respective channel, with a breakdown by traffic type similar to the SMS Sent/Delivered & traffic type widget.

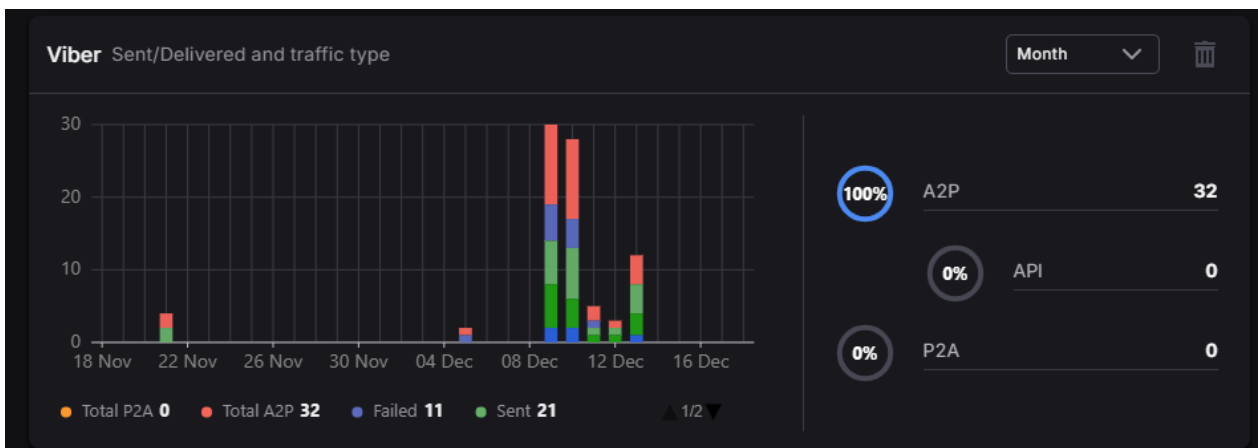
- *A2P (Application-to-Person)*: messages sent from the System to the contact.
- *API*: a subset of A2P (MT) messages sent via an API, not via Broadcasts, Chatbot, or Conversations sections.
- *P2A (Person-to-Application)*: messages sent by the contact (e.g. from a messenger) to the System.



WhatsApp Sent/Delivered and traffic type widget

WhatsApp Sent/Delivered and traffic type widget shows the number of messages sent and delivered through the respective channel, with a breakdown by traffic type:

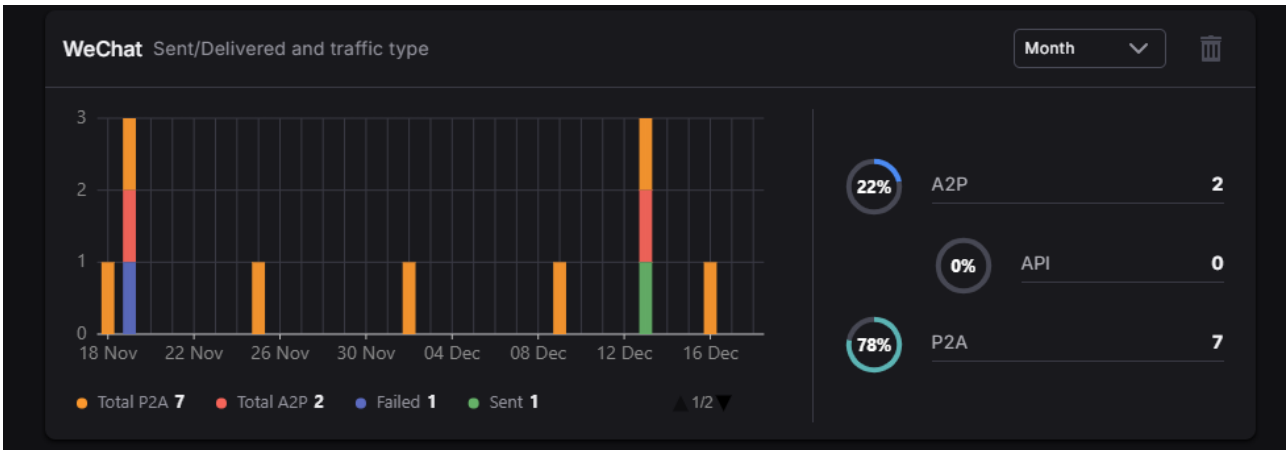
- *A2P (Application-to-Person)*: messages sent from the System to the contact.
- *API*: a subset of A2P (MT) messages sent via an API, not via Broadcasts, Chatbot, or Conversations sections.
- *P2A (Person-to-Application)*: messages sent by the contact (e.g. from a messenger) to the System.



Viber Sent/Delivered and traffic type widget

The Viber Sent/Delivered and traffic type widget shows the number of messages sent and delivered through the respective channel, with a breakdown by traffic type:

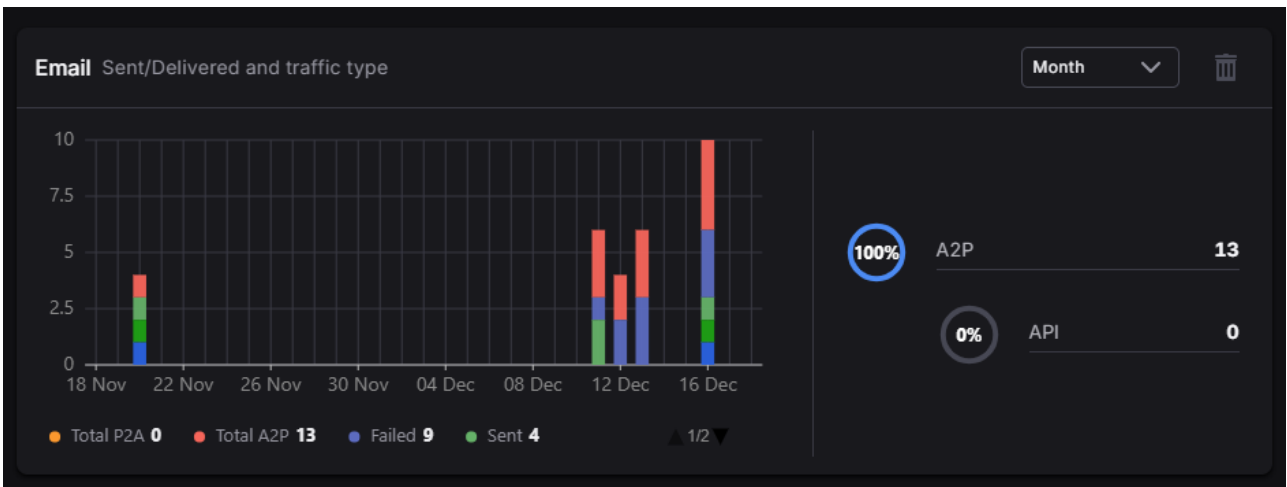
- *A2P (Application-to-Person)*: messages sent from the System to the contact.
- *API*: a subset of A2P (MT) messages sent via an API, not via Broadcasts, Chatbot, or Conversations sections.
- *P2A (Person-to-Application)*: messages sent by the contact (e.g. from a messenger) to the System.



WeChat Sent/Delivered and traffic type widget

The *WeChat Sent/Delivered and traffic type* widget shows the number of messages sent and delivered through the respective channel, with a breakdown by traffic type:

- *A2P (Application-to-Person)*: messages sent from the System to the contact.
- *API*: a subset of A2P (MT) messages sent via an API, not via Broadcasts, Chatbot, or Conversations sections.
- *P2A (Person-to-Application)*: messages sent by the contact (e.g. from a messenger) to the System.



Email Sent/Delivered and traffic type widget

The *Email Sent/Delivered and traffic type* widget shows the number of messages sent and delivered through the respective channel, with a breakdown by traffic type:

- *A2P (Application-to-Person)*: messages sent from the System to the contact.
- *API*: a subset of A2P (MT) messages sent via an API, not via Broadcasts, Chatbot, or Conversations sections.

Broadcasts				
id	name	date	recipients	broadcasts
11328	100k(3)(2)	02.06.2025 15:39	99 903	<div style="width: 100%;"></div>
11327	100k(3)(1)(1)(1)(1)	02.06.2025 15:38	2	<div style="width: 100%;"></div>
11325	100k(3)(1)(1)(1)	02.06.2025 14:38	2	<div style="width: 100%;"></div>
11323	100k(3)(1)(1)	02.06.2025 14:32	1	<div style="width: 100%;"></div>
11322	100k(3)(1)	02.06.2025 13:58	1	<div style="width: 100%;"></div>

Broadcasts widget

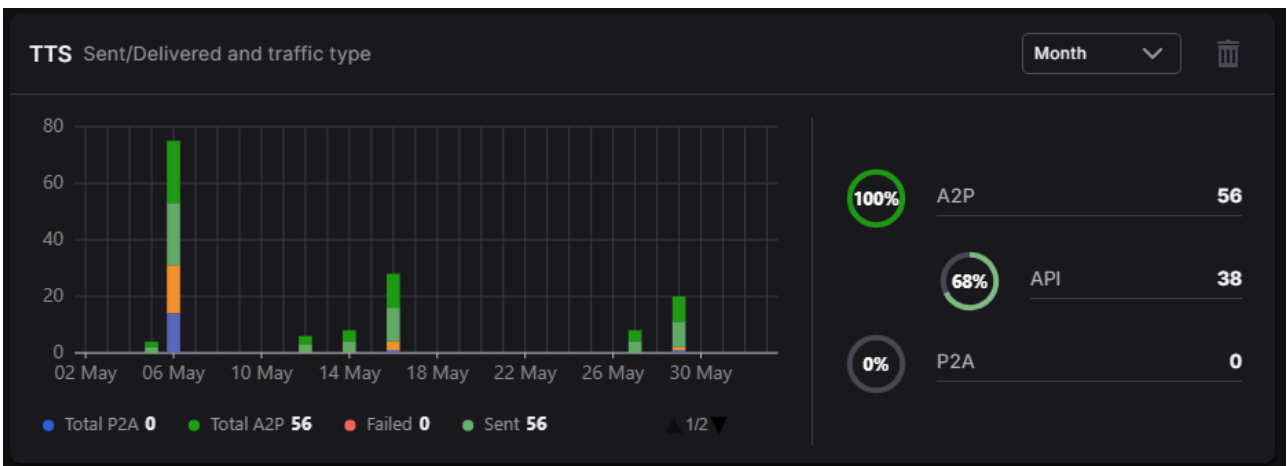
The *Broadcasts* widget shows IDs, names, dates, the number of recipients and the progress of the recent broadcasts. Hover over the progress bar to view the stats on each broadcast.



Push Sent/Delivered and traffic type widget

The *Push Sent/Delivered and traffic type* widget shows the number of push notifications sent and delivered through the respective channel, with a breakdown by traffic type:

- *A2P (Application-to-Person)*: messages sent from the System to the contact.
- *API*: a subset of A2P (MT) messages sent via an API, not via Broadcasts, Chatbot, or Conversations sections.
- *P2A (Person-to-Application)*: messages sent by the contact (e.g. from a messenger) to the System.



TTS (Text-To-Speech) Sent/Delivered and traffic type widget

The *TTS (Text-To-Speech) Sent/Delivered and traffic type* widget shows the number of messages sent and delivered through the respective channel, with a breakdown by traffic type:

- *A2P (Application-to-Person)*: messages sent from the System to the contact.
- *API*: a subset of A2P (MT) messages sent via an API, not via Broadcasts, Chatbot, or Conversations sections.
- *P2A (Person-to-Application)*: messages sent by the contact (e.g. from a messenger) to the System.

NOTE: TTS (Text-To-Speech) channel serves to convert text messages into a voice call.

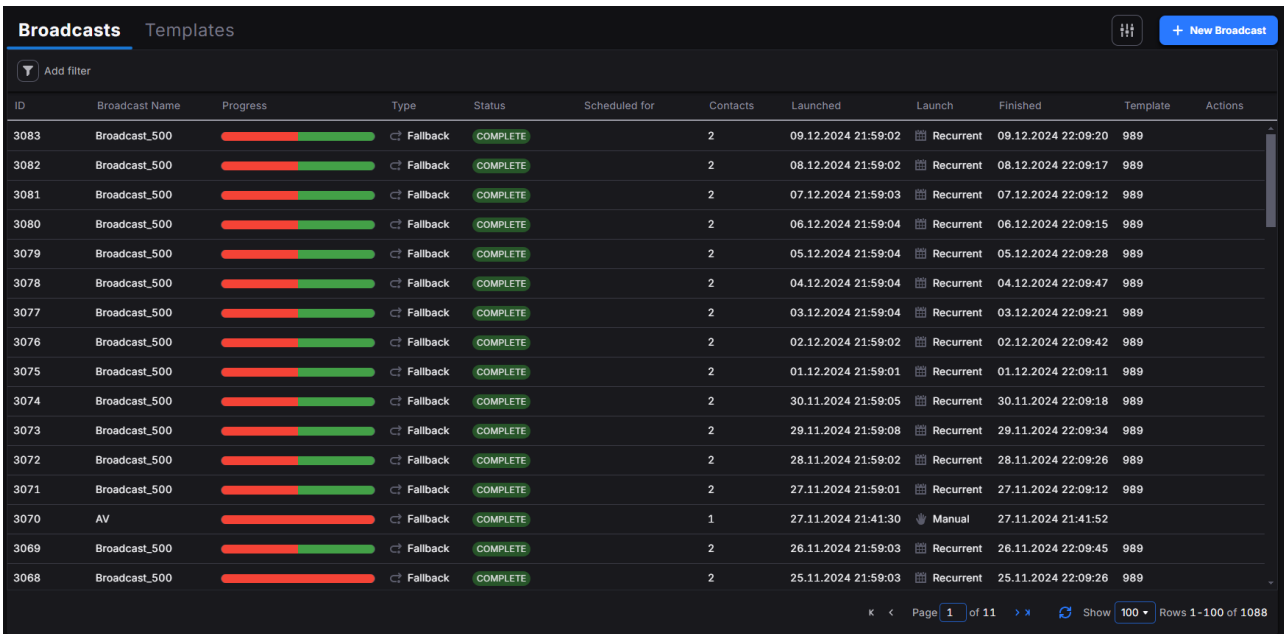
7 Broadcasts

Broadcasts allow one-way communication with a multichannel fallback chain.

The *Broadcasts* section allows users to:

- Create and launch a new broadcast using all available channels and templates.
- Monitor the statistics for all broadcasts launched since account registration.
- Rerun any existing broadcast as it was created or modify it before its launch.

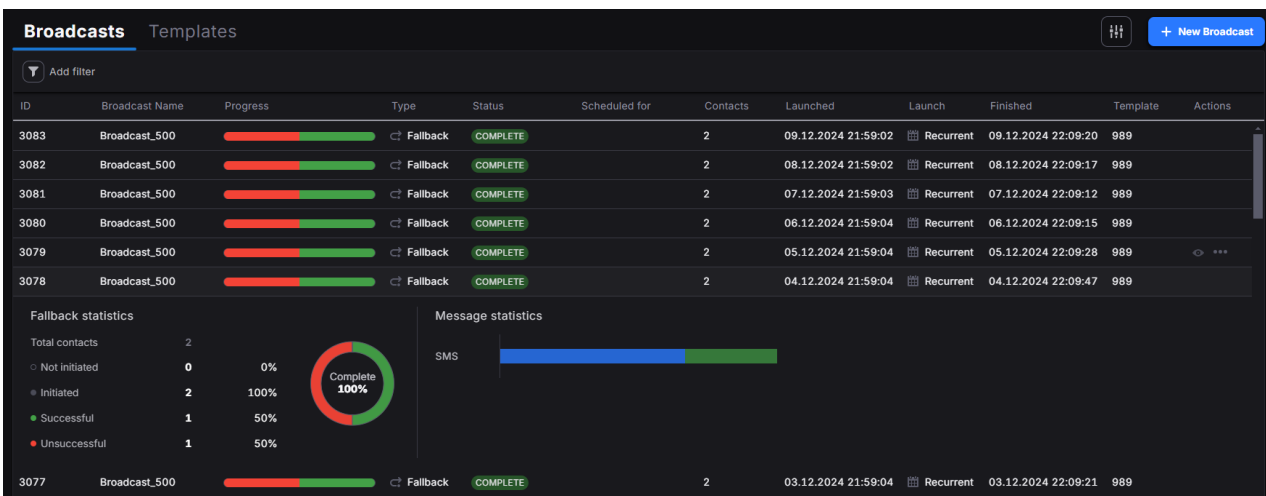
The *Broadcasts* section includes two tabs: *Broadcasts* and *Templates*.



ID	Broadcast Name	Progress	Type	Status	Scheduled for	Contacts	Launched	Launch	Finished	Template	Actions
3083	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	09.12.2024 21:59:02	Recurrent	09.12.2024 22:09:20	989	
3082	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	08.12.2024 21:59:02	Recurrent	08.12.2024 22:09:17	989	
3081	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	07.12.2024 21:59:03	Recurrent	07.12.2024 22:09:12	989	
3080	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	06.12.2024 21:59:04	Recurrent	06.12.2024 22:09:15	989	
3079	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	05.12.2024 21:59:04	Recurrent	05.12.2024 22:09:28	989	
3078	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	04.12.2024 21:59:04	Recurrent	04.12.2024 22:09:47	989	
3077	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	03.12.2024 21:59:04	Recurrent	03.12.2024 22:09:21	989	
3076	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	02.12.2024 21:59:02	Recurrent	02.12.2024 22:09:42	989	
3075	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	01.12.2024 21:59:01	Recurrent	01.12.2024 22:09:11	989	
3074	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	30.11.2024 21:59:05	Recurrent	30.11.2024 22:09:18	989	
3073	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	29.11.2024 21:59:08	Recurrent	29.11.2024 22:09:34	989	
3072	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	28.11.2024 21:59:02	Recurrent	28.11.2024 22:09:26	989	
3071	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	27.11.2024 21:59:01	Recurrent	27.11.2024 22:09:12	989	
3070	AV	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		1	27.11.2024 21:41:30	Manual	27.11.2024 21:41:52		
3069	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	26.11.2024 21:59:03	Recurrent	26.11.2024 22:09:45	989	
3068	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	25.11.2024 21:59:03	Recurrent	25.11.2024 22:09:26	989	

Broadcasts overview

Click on the record in the table to view broadcast statistics.



ID	Broadcast Name	Progress	Type	Status	Scheduled for	Contacts	Launched	Launch	Finished	Template	Actions
3083	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	09.12.2024 21:59:02	Recurrent	09.12.2024 22:09:20	989	
3082	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	08.12.2024 21:59:02	Recurrent	08.12.2024 22:09:17	989	
3081	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	07.12.2024 21:59:03	Recurrent	07.12.2024 22:09:12	989	
3080	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	06.12.2024 21:59:04	Recurrent	06.12.2024 22:09:15	989	
3079	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	05.12.2024 21:59:04	Recurrent	05.12.2024 22:09:28	989	...
3078	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	04.12.2024 21:59:04	Recurrent	04.12.2024 22:09:47	989	

Fallback statistics

Total contacts	2
○ Not initiated	0 0%
● Initiated	2 100%
● Successful	1 50%
● Unsuccessful	1 50%

Message statistics

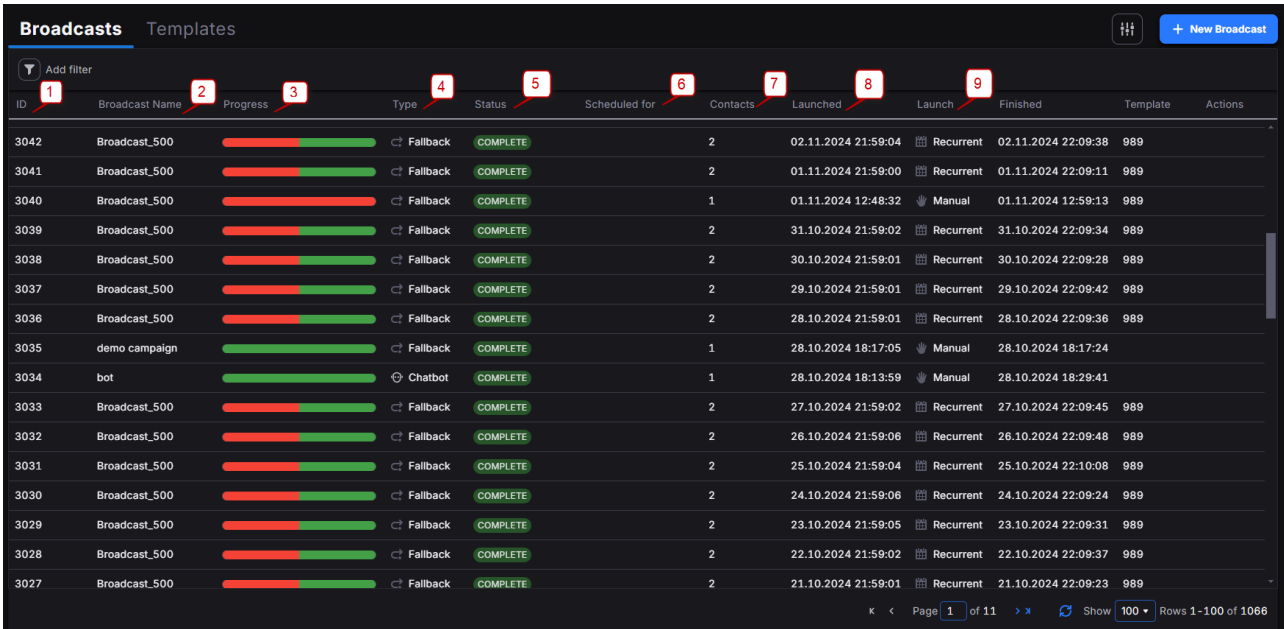
SMS

3077	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE		2	03.12.2024 21:59:04	Recurrent	03.12.2024 22:09:21	989	
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Broadcasts statistics

7.1 Broadcasts

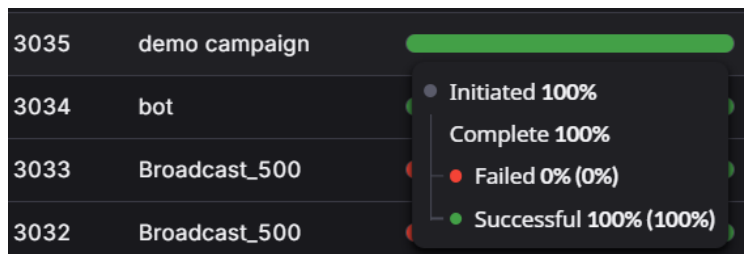
The *Broadcasts* tab shows the table of runs and provides the following information on the details and features of broadcasts:



ID	Broadcast Name	Progress	Type	Status	Scheduled for	Contacts	Launched	Launch	Finished	Template	Actions
3042	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE	02.11.2024 21:59:04	2	02.11.2024 21:59:04	Recurrent	02.11.2024 22:09:38	989	
3041	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE	01.11.2024 21:59:00	2	01.11.2024 21:59:00	Recurrent	01.11.2024 22:09:11	989	
3040	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE	01.11.2024 12:48:32	1	01.11.2024 12:48:32	Manual	01.11.2024 12:59:13	989	
3039	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE	31.10.2024 21:59:02	2	31.10.2024 21:59:02	Recurrent	31.10.2024 22:09:34	989	
3038	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE	30.10.2024 21:59:01	2	30.10.2024 21:59:01	Recurrent	30.10.2024 22:09:28	989	
3037	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE	29.10.2024 21:59:01	2	29.10.2024 21:59:01	Recurrent	29.10.2024 22:09:42	989	
3036	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE	28.10.2024 21:59:01	2	28.10.2024 21:59:01	Recurrent	28.10.2024 22:09:36	989	
3035	demo campaign	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE	28.10.2024 18:17:05	1	28.10.2024 18:17:05	Manual	28.10.2024 18:17:24		
3034	bot	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Chatbot	COMPLETE	28.10.2024 18:13:59	1	28.10.2024 18:13:59	Manual	28.10.2024 18:29:41		
3033	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE	27.10.2024 21:59:02	2	27.10.2024 21:59:02	Recurrent	27.10.2024 22:09:45	989	
3032	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE	26.10.2024 21:59:06	2	26.10.2024 21:59:06	Recurrent	26.10.2024 22:09:48	989	
3031	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE	25.10.2024 21:59:04	2	25.10.2024 21:59:04	Recurrent	25.10.2024 22:10:08	989	
3030	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE	24.10.2024 21:59:06	2	24.10.2024 21:59:06	Recurrent	24.10.2024 22:09:24	989	
3029	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE	23.10.2024 21:59:05	2	23.10.2024 21:59:05	Recurrent	23.10.2024 22:09:31	989	
3028	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE	22.10.2024 21:59:02	2	22.10.2024 21:59:02	Recurrent	22.10.2024 22:09:37	989	
3027	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>	Fallback	COMPLETE	21.10.2024 21:59:01	2	21.10.2024 21:59:01	Recurrent	21.10.2024 22:09:23	989	

Broadcasts table

1. *ID*: the broadcast internal identification number.
2. *Broadcast Name*: the name of a broadcast.
3. *Progress*: the broadcast summary that shows the progress and percentage of delivered and undelivered messages. To see the percentage, hover over the field or click on the broadcast (see picture below).



3035	demo campaign	<div style="width: 100%;"><div style="width: 100%;"></div></div>
3034	bot	<div style="width: 100%;"><div style="width: 100%;"></div></div>
3033	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>
3032	Broadcast_500	<div style="width: 100%;"><div style="width: 100%;"></div></div>

Broadcast Progress percentage

4. *Type*: broadcast type. Possible values:
 - *Fallback*;
 - *Chatbot* (for instructions on launching chatbot scripts, see [Conversations\Chatbots](#));
 - *RCS capability check*.
5. *Status*: broadcast status (*Draft*, *Scheduled*, *In progress*, *Complete*, *Paused*, *Aborted*, *Failed*, *Seen*).
6. *Scheduled for*: the date and time a broadcast is scheduled for set as DD.MM.YYYY and HH24:MI:SS.

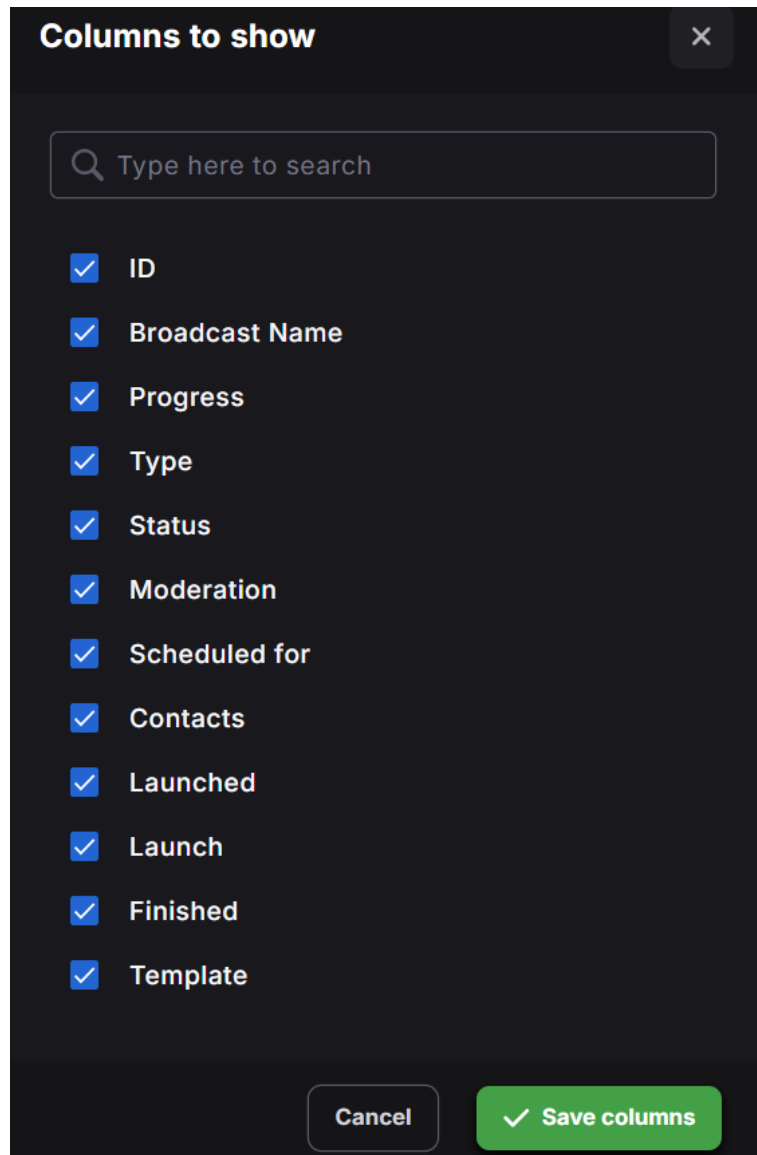
- 7. *Contacts*: the number of contacts in a broadcast.
- 8. *Launched*: the date and time a broadcast was launched set as DD.MM.YYYY and HH24:MI:SS.
- 9. *Launch*: launch type (*Manual*, *Recurrent* or *API*).

Contacts	Launched	Launch	Finished	Template	Actions
2	28.09.2024 21:59:02	Recurrent	28.09.2024 22:09:49	989	
2	27.09.2024 21:59:00	Recurrent	27.09.2024 22:09:21	989	
2	26.09.2024 21:59:00	Recurrent	26.09.2024 22:09:56	989	
2	25.09.2024 21:59:01	Recurrent	25.09.2024 22:09:36	989	
2	25.09.2024 11:22:56	Recurrent	25.09.2024 11:34:15	989	
1	28.08.2024 16:36:15	Manual	28.08.2024 17:06:15	1021	
1	19.08.2024 11:39:30	Manual	19.08.2024 11:39:30	1017	Copy
1	19.08.2024 11:29:10	Manual	19.08.2024 11:29:10	1017	Relaunch for failed
1	19.08.2024 10:28:26	Manual	19.08.2024 10:58:26	1018	
1	01.08.2024 17:15:28	Manual	01.08.2024 17:45:28	1017	
1	01.08.2024 16:35:45	Manual	01.08.2024 17:05:45	1016	
1	01.08.2024 16:35:38	Manual	01.08.2024 17:05:38	1015	



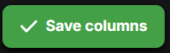

⏪ ⏩ Page 1 of 11 ⏪ ⏩ 🔄 Show 100 Rows 1-100 of 1051

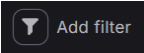

Broadcasts table (continued)

- 10. *Finished*: the date and time a broadcast was finished set as DD.MM.YYYY HH24:MI:SS.
- 11. *Template*: Broadcast template ID.
- 12. *Actions*: Hover over the record to view the controls. Click to view the broadcast or edit a broadcast with *Draft* or *Scheduled* status. Click Copy to copy the broadcast, Relaunch for failed to relaunch for failed messages in a broadcast with *Complete* status or to pause a broadcast with *In progress* or *Sent* status.



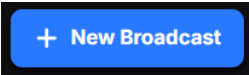
Columns to show tab

Click  to open the *Columns to show* tab and customize the display of columns. Type the name of the column in the search bar or select the column you want to display from the list and click *Cancel*  to discard the changes or *Save columns*  to save them. Click  to close the tab (see figure above).

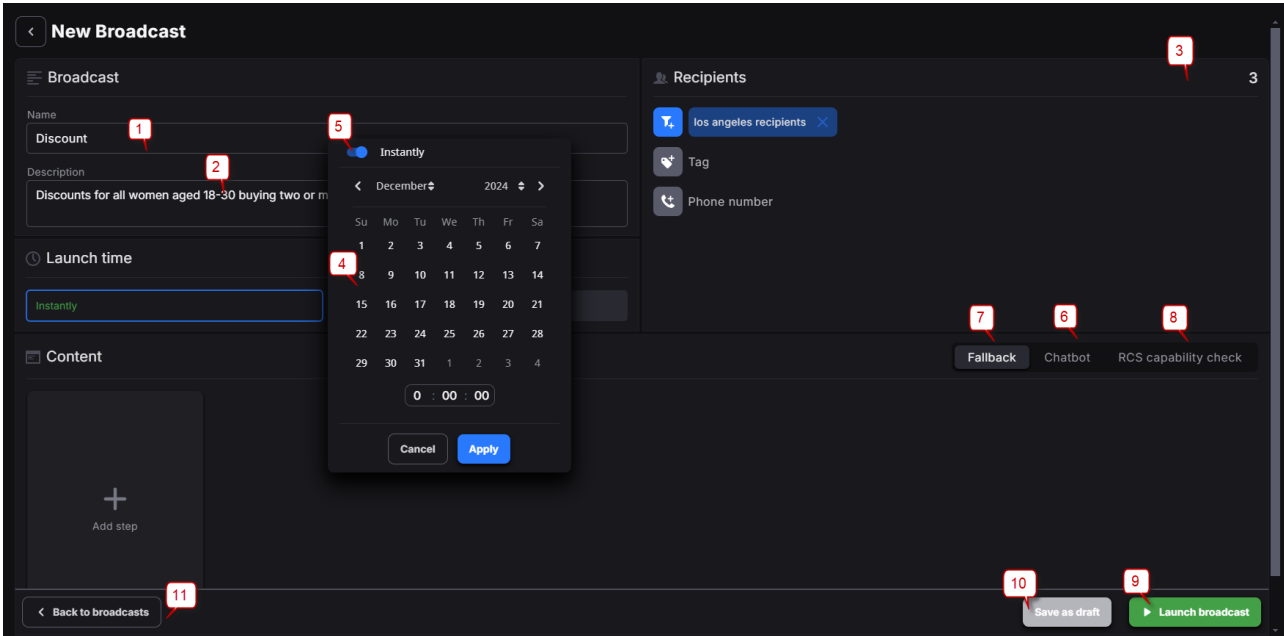
Click *Add filter*  to search for the records and filter the data in a range of table. You can either apply a filter to get up-to-date results, or clear a filter to redisplay all of the data. (see [Filtering broadcasts and templates](#)  for more detail)

Click *New Broadcast*  to create a new broadcast as explained in [Creating a broadcast](#). 

7.1.1 Creating a broadcast




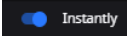
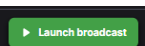


Click  to create a new broadcast.



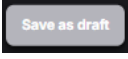
Creating a new broadcast

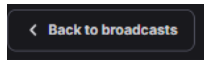
The *New broadcast* form contains the following fields and controls:

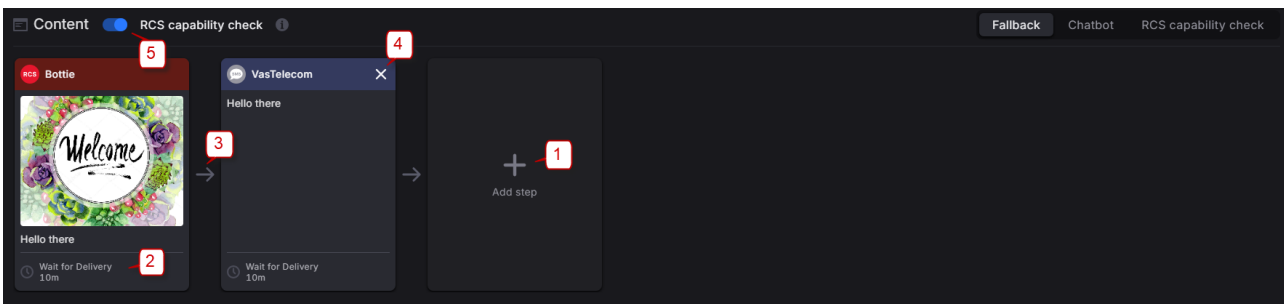
1. *Broadcast name* (required).
2. *Description*: the broadcast description - for example, date of the first run, templates used or other specific details, etc.
3. Select the group of recipients ([Targets](#)^[90]) from the database of [Contacts](#)^[80], tags or phone number. Click on the icon to expand the drop-down list with all existing target filters (see [Filtering and sorting](#)^[34] for more detail) and tags. Click  to enter a phone number or several phone numbers separated by ",", then click  to add it. Click  to remove the drop-down list or the phone number(s).
4. Schedule the launch date and time.
5. Switch to *Instantly*  to run the broadcast immediately.
6. Switch to *Chatbot* when creating a 2-way campaign. Select the chatbot name and sender ID. The sender IDs list will contain only those sender IDs for which the chatbot script is created.
7. Switch to *Fallback* to select channels to which the System will redirect the message if the primary channel fails (see below for details).
8. Switch to *RCS capability check* to check if the customer's mobile device has the capability to receive RCS messages.
9. Click *Launch broadcast*  to launch the broadcast.

NOTE: If moderation is enabled for the company that creates a broadcast, the *Launch broadcast* button will be replaced by the *Send to moderation* button.

NOTE: If upper-level reseller has enabled moderation for the current company, broadcasts will be sent for moderation only after the application is updated. The application can be updated by pressing the F5 function key.





10. Click *Save as draft*  to save the broadcast as draft and return to it later.

11. Click *Back to broadcasts*  to return to the broadcasts table.



Fallback chain

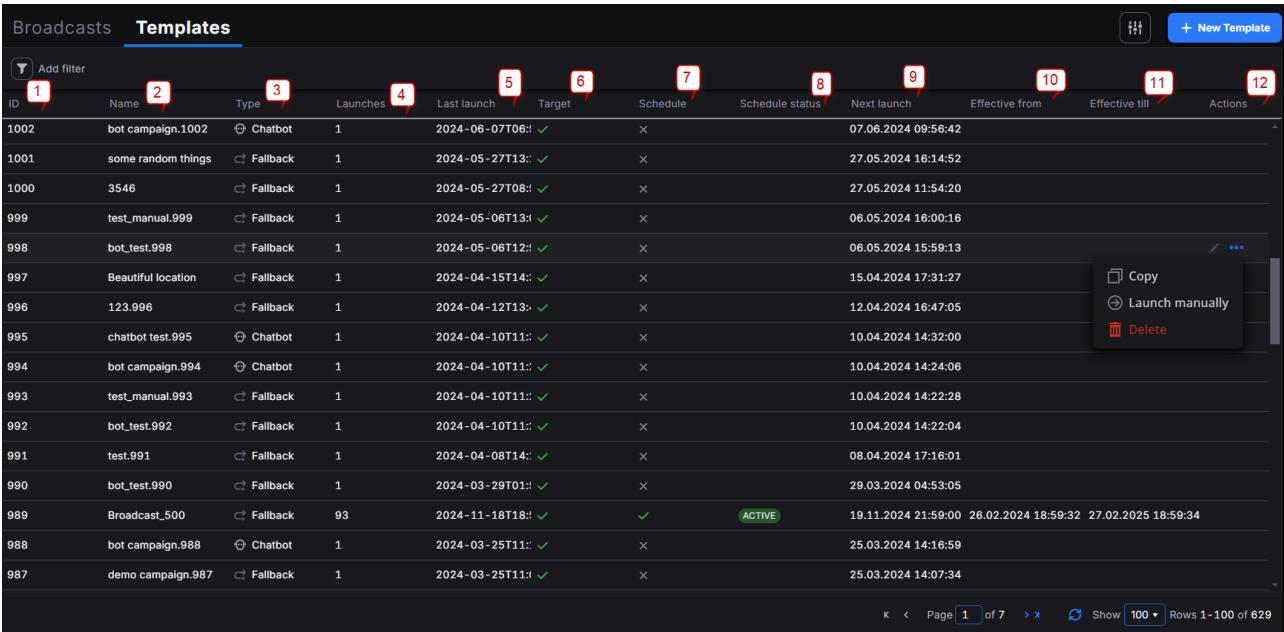
To configure a fallback chain (item 7 above):

1. Click  to access the list of channels available for multichannel broadcasts (*SMS, RCS, Viber, WhatsApp, Email, Push, TTS or Mobile Push*). Select a channel and jump to the [Message constructor](#) .
2. In the [Message constructor](#)  set the message status and the time frame within which this status must be received in order to complete the broadcast for a particular recipient. Otherwise, the System will try to deliver the message to the next channel in the fallback chain.
3. For example, if the RCS message does not get the status “delivery success” within 10 min, the System will send it to the recipient over the SMS channel.
4. Click  to delete a fallback channel.
5. Switch the toggle to perform RCS capability check before launching a broadcast.

NOTE: The RCS capability check toggle appears only when the RCS channel has been added to a fallback chain.

7.2 Templates



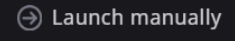
The *Templates* tab contains the table of broadcast templates.

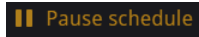
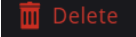




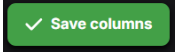

ID	Name	Type	Launches	Last launch	Target	Schedule	Schedule status	Next launch	Effective from	Effective till	Actions
1002	bot campaign.1002	Chatbot	1	2024-06-07T06:00:00	✓	×		07.06.2024 09:56:42			
1001	some random things	Fallback	1	2024-05-27T13:00:00	✓	×		27.05.2024 16:14:52			
1000	3546	Fallback	1	2024-05-27T08:00:00	✓	×		27.05.2024 11:54:20			
999	test_manual.999	Fallback	1	2024-05-06T13:00:00	✓	×		06.05.2024 16:00:16			
998	bot_test.998	Fallback	1	2024-05-06T12:00:00	✓	×		06.05.2024 15:59:13			
997	Beautiful location	Fallback	1	2024-04-15T14:00:00	✓	×		15.04.2024 17:31:27			
996	123.996	Fallback	1	2024-04-12T13:00:00	✓	×		12.04.2024 16:47:05			Copy, Launch manually, Delete
995	chatbot test.995	Chatbot	1	2024-04-10T11:00:00	✓	×		10.04.2024 14:32:00			
994	bot campaign.994	Chatbot	1	2024-04-10T11:00:00	✓	×		10.04.2024 14:24:06			
993	test_manual.993	Fallback	1	2024-04-10T11:00:00	✓	×		10.04.2024 14:22:28			
992	bot_test.992	Fallback	1	2024-04-10T11:00:00	✓	×		10.04.2024 14:22:04			
991	test.991	Fallback	1	2024-04-08T14:00:00	✓	×		08.04.2024 17:16:01			
990	bot_test.990	Fallback	1	2024-03-29T01:00:00	✓	×		29.03.2024 04:53:05			
989	Broadcast_500	Fallback	93	2024-11-18T18:00:00	✓	✓	ACTIVE	19.11.2024 21:59:00	26.02.2024 18:59:32	27.02.2025 18:59:34	
988	bot campaign.988	Chatbot	1	2024-03-25T11:00:00	✓	×		25.03.2024 14:16:59			
987	demo campaign.987	Fallback	1	2024-03-25T11:00:00	✓	×		25.03.2024 14:07:34			

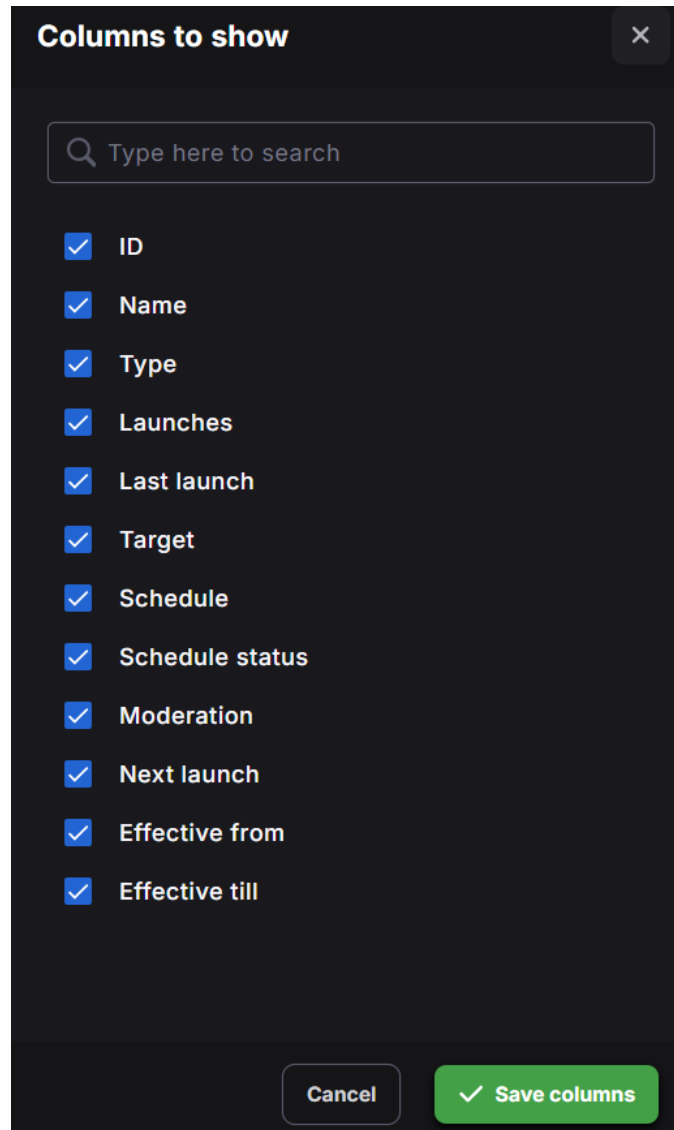
Templates tab overview

The table contains the following columns:

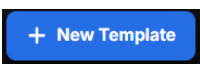
- ID:** the internal identification number of a template.
- Name:** the name of a template.
- Type:** the type of a template (*Fallback*, *Chatbot*, *RCS capability check*).
- Launches:** number of launches.
- Last launch:** the date and time of the last launch set as YYYY.MM.DD HH24:MI:SS.
- Target:** the field shows that a group of recipients (Target groups) has been selected for the template.
- Schedule:** shows if the broadcast has been scheduled for a specific date and time over a period of time (*True*) or not (*False*).
- Schedule status:** the status of the schedule if the broadcast is run on a specific date and time over a period of time.
- Next launch:** the date and time a broadcast will be launched set as DD.MM.YYYY and HH24:MI:SS. The date of the last launch appears in the column if the schedule is not active.
- Effective from:** shows the schedule start date set as DD.MM.YYYY and HH24:MI:SS.
- Effective till:** shows the schedule end date DD.MM.YYYY and HH24:MI:SS.
- Actions:** Hover over the record to view the controls. Click  to edit the template, click  **Copy** to copy the template, **Launch manually**  to launch the broadcast manually. Click *Resume schedule* for the templates with *Paused* status, and *Pause schedule*

 **Pause schedule** for the templates with *Active* and *Expired* statuses. Click *Delete*  **Delete** to delete the template.

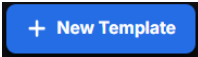
Click  to open the *Columns to show* tab and customize the display of columns. Type the name of the column in the search bar or select the column you want to display from the list and click *Cancel*  to discard the changes or *Save columns*  to save them. Click  to close the tab. (see picture below).

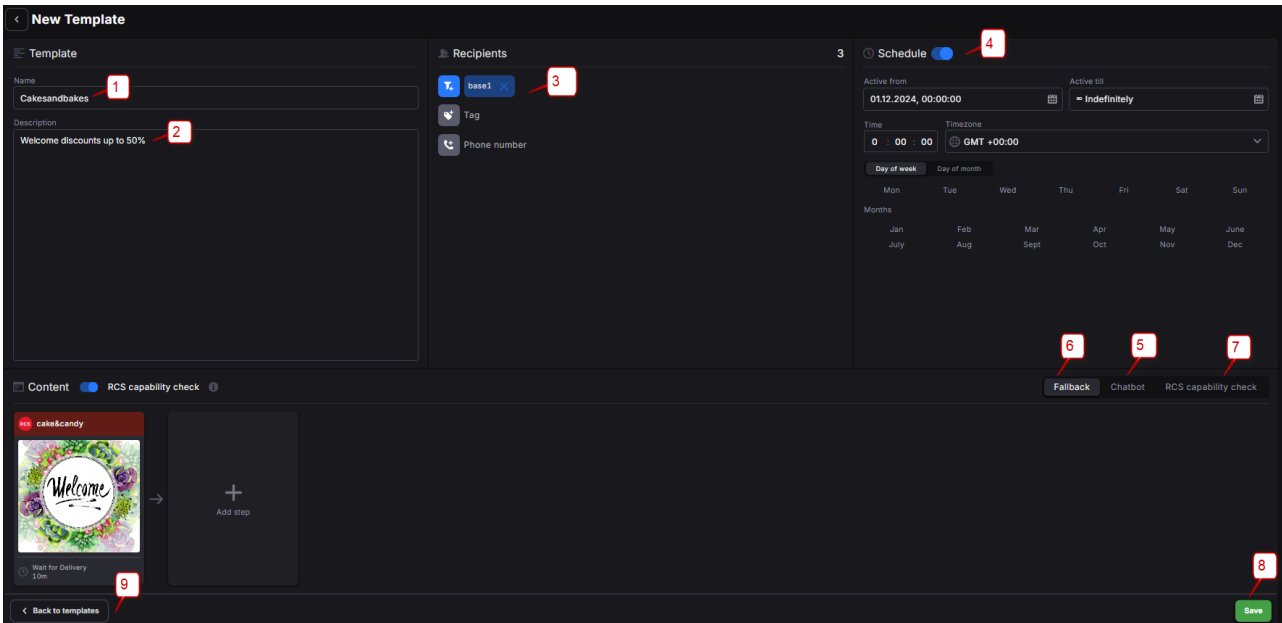


Columns to show tab

Click *New Template*  to create a new template.





7.2.1 Creating a new template

Click *New Template*  to create a new template you want to use for the broadcasts.

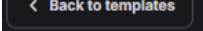


Creating a new template

The *New template* form contains the following fields and controls:

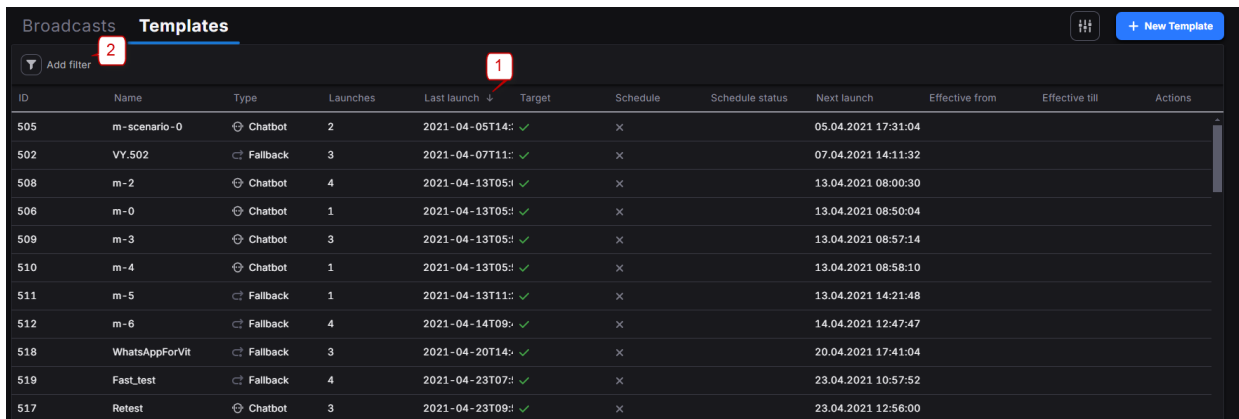
1. *Name* (required).
2. *Description*: the template description - for example, date of the first run, content or other specific details etc.
3. Select the group of recipients ([Target](#)^[90]) from the database of [Contacts](#)^[80], tags or phone number. Click on the icon to expand the drop-down list with all existing targets (see [Filtering and sorting](#)^[34] for more detail) and tags. Click  to enter a phone number or several phone numbers separated by ",", then click  to add it. Click  to remove the drop-down list or the phone number(s).
4. Schedule the launch date and time.
5. Switch to *Chatbot* when creating a 2-way campaign. Select the chatbot name and sender ID. The sender IDs list will contain only those sender IDs for which the chatbot script is created.
6. Switch to *Fallback* to configure a fallback chain (see [Creating a broadcast](#)^[29] for more detail on selecting channels to which the System will redirect the message if the primary channel fails and configuring message parameters).
7. Switch to *RCS capability check* to check if the customer's mobile device has the capability to receive RCS messages.
8. Click *Save*  to save the template.

NOTE: If moderation is enabled for the company that creates a template, *Save as draft* and *Send to moderation* buttons will be displayed instead of *Save* button.

- Click *Back to templates*  to return to the templates table.

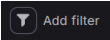
7.3 Filtering and sorting

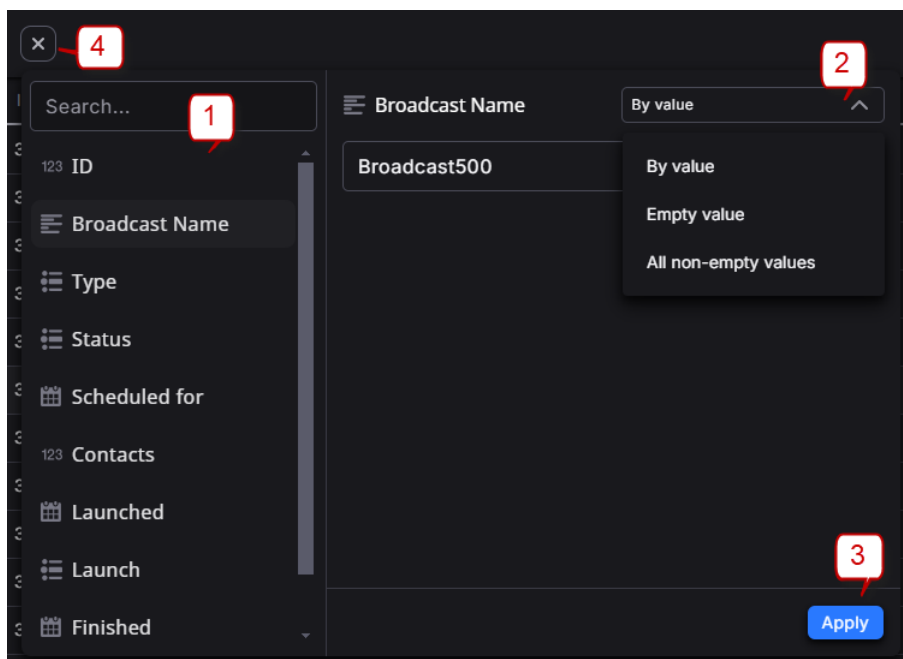
To create and apply a filter to broadcasts and templates, and sort them proceed as follows:



The screenshot shows a table with columns: ID, Name, Type, Launches, Last launch, Target, Schedule, Schedule status, Next launch, Effective from, Effective till, and Actions. A red box labeled '1' highlights the 'Last launch' column header, and another red box labeled '2' highlights the 'Add filter' button in the top left corner of the table.

Sorting



- Click on the column header to apply sorting (descending). Click again to apply ascending sorting.
- Click Add filter  to expand the filtering panel with the list of all existing filters.




The screenshot shows the filtering panel with a search bar (1), a list of filters including 'Broadcast Name' (2), and an 'Apply' button (3). A red box labeled '4' highlights the close button (X) in the top left corner of the panel.

Filtering panel

Use the filtering panel to add filter as described below:

- Select a filter to be applied or use *Search* function  to do it.
- When *By value* is selected in the filtering panel and enter any substring (start entering the column value) in the field below. Other possible options are *Empty value* and *Non-empty values*.
- Click *Apply*  to apply the filter.

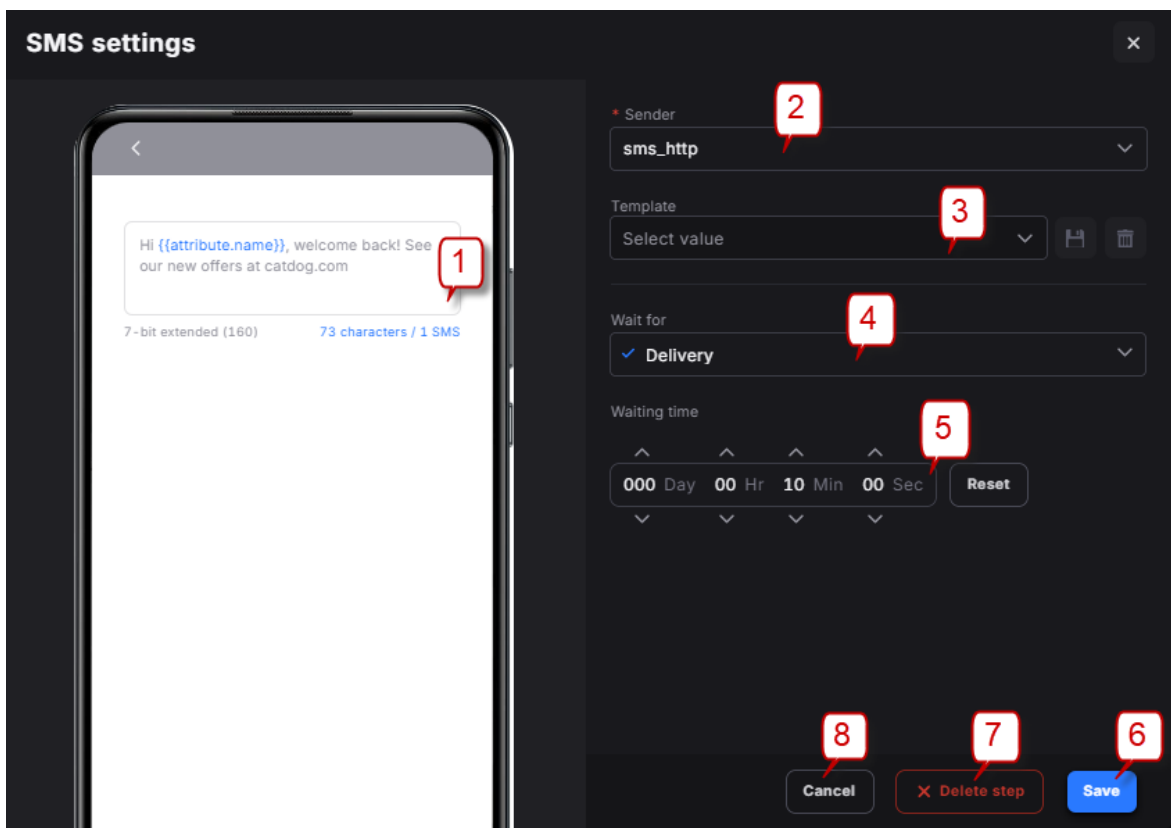
- Click  to close the filtering panel.

NOTE: Unified filtering panel is available in all interfaces that provide functions for grouping and filtering the displayed data. You can run one filter at a time to filter the rows in the table.



7.4 Message constructor

The Message constructor serves to create messages for all available channels (*SMS, RCS, Viber, WhatsApp, Email, Push, TTS and Mobile Push*). It is also available in [Assets\Content templates](#)^[149], [Assets\Whatsapp Templates](#)^[160] and [Conversations\Chatbots](#)^[114].

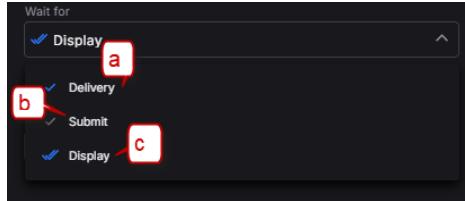
The basic message settings algorithm is common for all channels. The difference is in creation of content. The figure below explains the general algorithm for configuring message parameters irrespective of the selected channel.



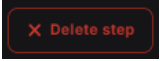
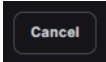
Message settings

- Configure the message content (this section differs based on the channel type).
- Choose a Sender ID. The parameter is mandatory for the broadcast you are going to run or schedule. It is optional for templates (see item 3 below).
- Select an existing template or create a new template. Name the message and save it as a template. It will be available for use in further broadcasts. Click  to save the template or  to clear the edit box.
- Choose the criterion for the message success. Possible values are:
 - Delivery*: the message is considered successful if it has been delivered to the recipient's device (the "delivered" DLR report has been received for it).

- b. *Submit*: the message is considered successful if it has been submitted (a successful submit_sm_response has been received from the vendor).
- c. *Display*: the message is considered successful if it was opened on the recipient device (the "displayed"/"display success" DLR report has been received for it).

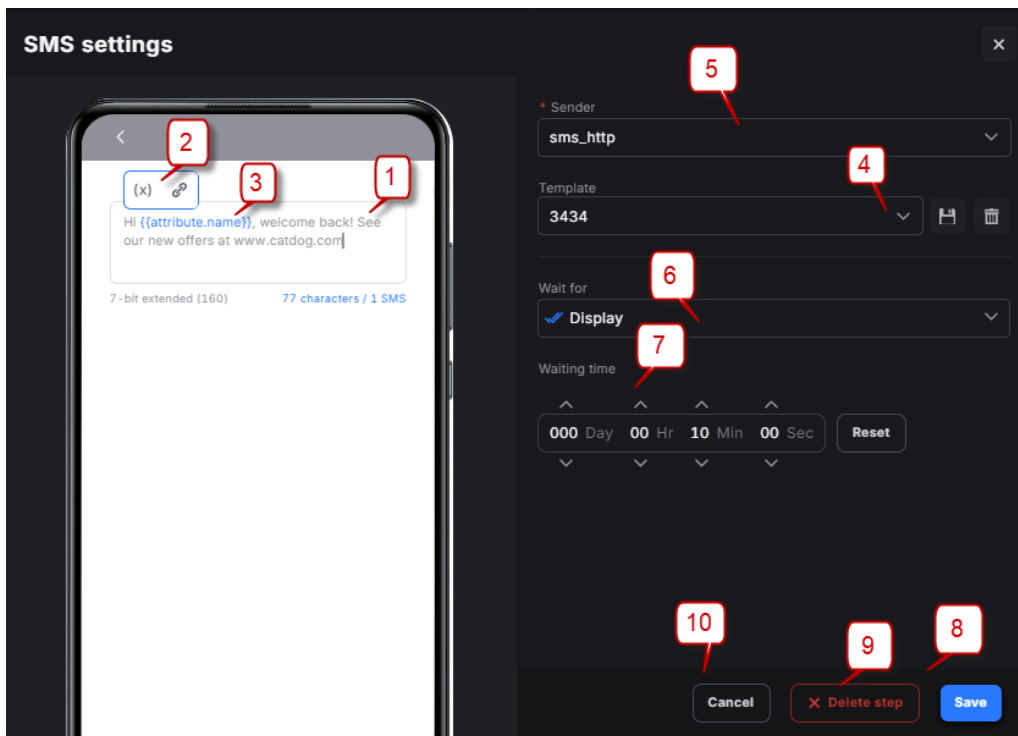


Message success settings

- 5. Specify the waiting time. If it expires before the message sending is considered successful (based on (4) in the figure above), the System will attempt sending it through the next-in-line channel. Reset the waiting time if necessary.
- 6. Save the message to run or schedule broadcasts.
- 7. Click *Delete step*  to delete this step from the fallback chain.
- 8. Click *Cancel*  to cancel the changes in the message settings.



7.4.1 SMS message settings

The SMS message settings are illustrated in the figure below.



SMS message settings

- 1. Type the message text. Concatenated messages are supported.
- 2. Personalize the message with data from the user profile in the [Contacts](#) database.

3. Select attributes for personalization.
4. Select an existing template or create a new template. Name the message and save it as a template. It will be available for use in further broadcasts. Click  to save the template or  to clear the edit box.
5. Choose a Sender ID. The parameter is mandatory for the broadcast you are going to run or schedule. It is optional for templates.
6. Choose the criterion for the message success. Possible values are:
 - a. *Delivery*: the message is considered successful if it has been delivered to the recipient's device (the "delivered" DLR report has been received for it).
 - b. *Submit*: the message is considered successful if it has been submitted (a successful submit_sm_response has been received from the vendor).
 - c. *Display*: the message is considered successful if it was opened on the recipient device (the "displayed"/"display success" DLR report has been received for it).
7. Specify the waiting time. If it expires before the message sending is considered successful (based on (6) in the figure above), the System will attempt sending it through the next-in-line channel.
8. Save the message to run or schedule broadcasts.

9. Click *Delete step*  to delete this step from the fallback chain.

10. Click *Cancel*  to cancel the changes in the message settings.

7.4.2 RCS message settings

This section describes possible RCS message types and layouts. RCS messages allow sending messages of the following types (formats):

- *Rich Card*;
- *Carousel*;
- *Text*;
- *File*.

NOTE: Text styles in RCS messages - such as bold and italic for titles and bodies - is supported only by GSMA API and not supported by Google RBM. Users can set any styles for Google RBM connectivity, but, when sent through Google to the phone, such messages will always come in one format - the title in bold, and the text of the card as regular text.

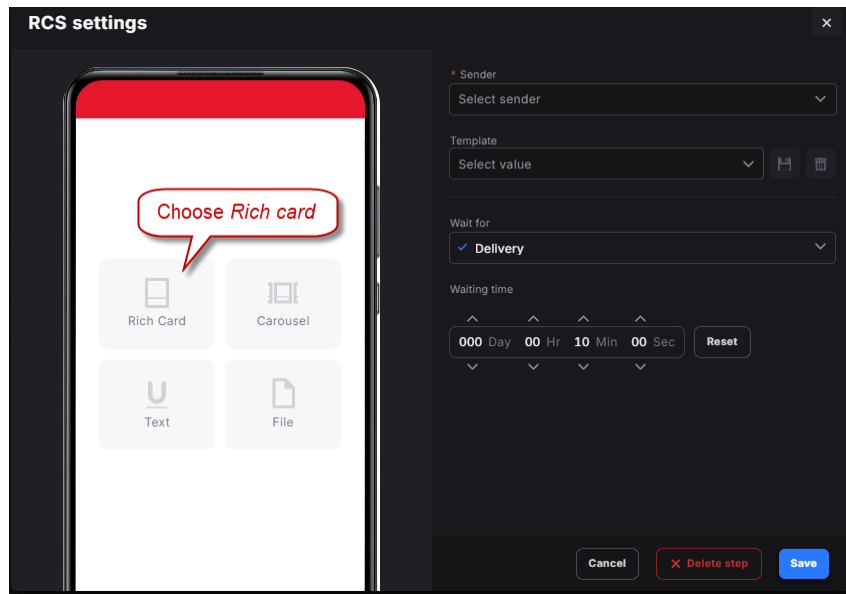
Follow the instructions detailed below for configuring the message content for various RCS formats. Configure the channel-independent message parameters as detailed in [Message constructor](#) ³⁵.

7.4.2.1 Rich card. Image + text + interactive controls

Follow the steps detailed below:

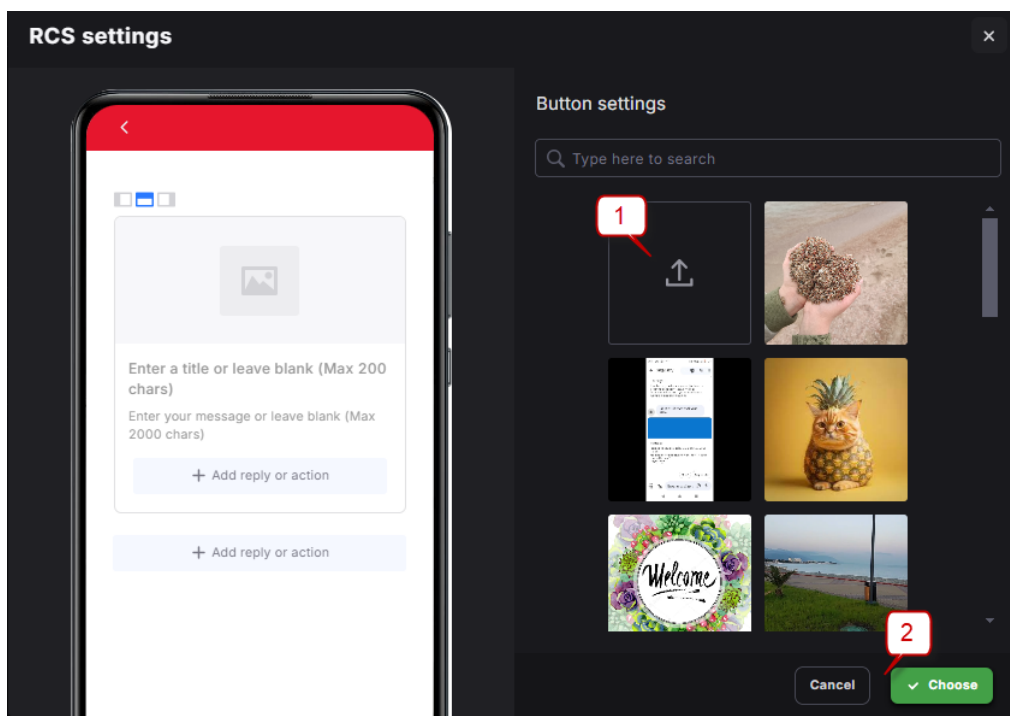
- I. Choose the format (Rich Card).
- II. Upload a picture from your device or add a picture from the [Media content database](#) ¹⁴².
- III. Choose the rich card layout, image size and text formatting.

IV. Configure contact's actions and replies.





Select Rich Card message format

I. Choose the format (Rich Card).

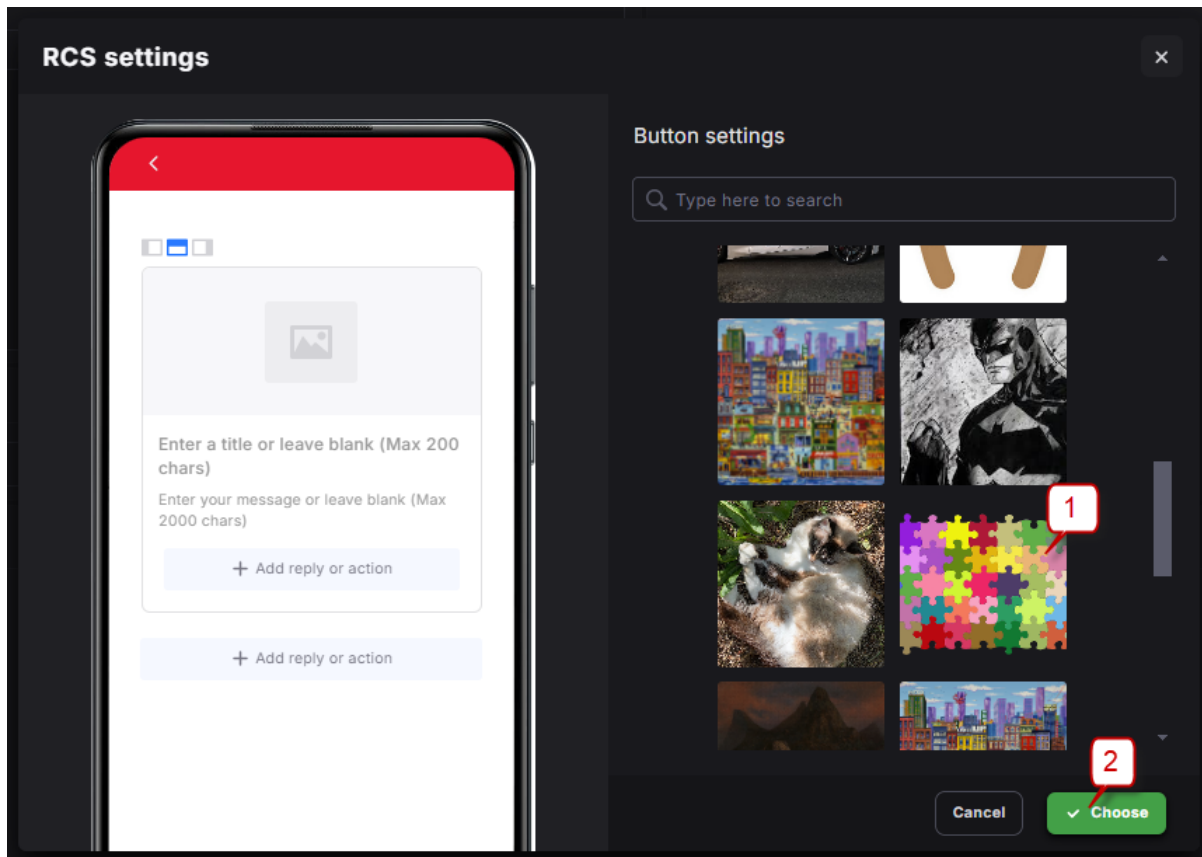


Adding images from the device

II. Click  to upload a picture from your device or to add a picture from the [Media content database](#)^[142]. To upload from the local device:

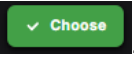
1. Click  to select a file from your device and upload the file. It will be saved for the message and in the [Media content database](#)^[142] as well.

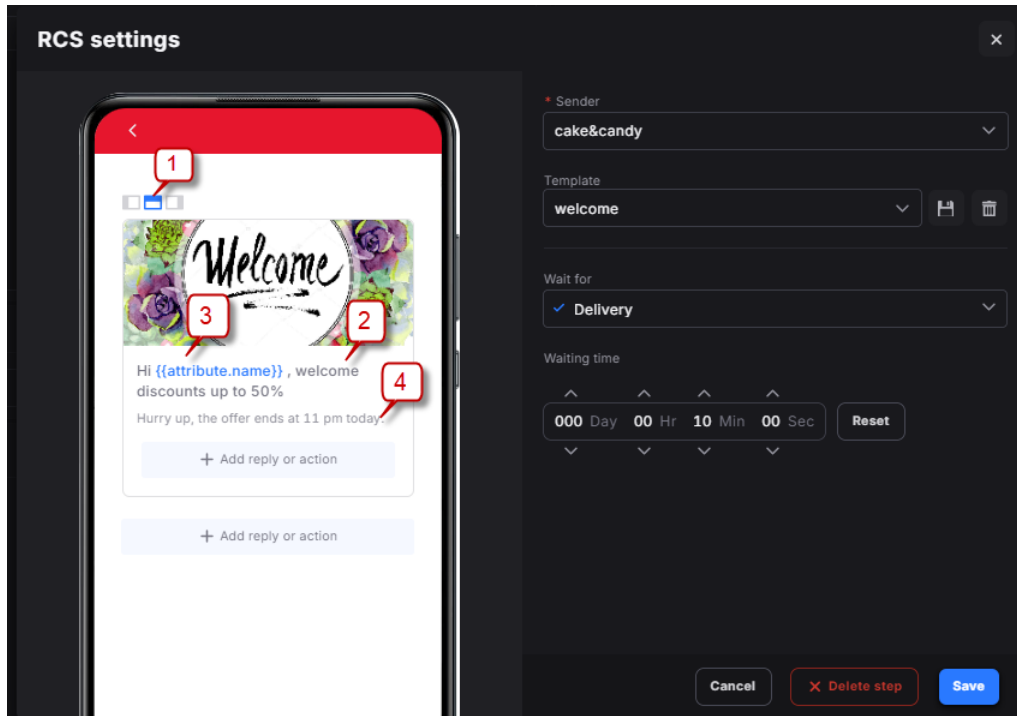
2. Click *Choose*  to choose the file or *Cancel*  to discard the changes.



Adding images from the Message content database

To add a picture from the [Media content database](#) ¹⁴²:

1. Select an image.
2. Click .

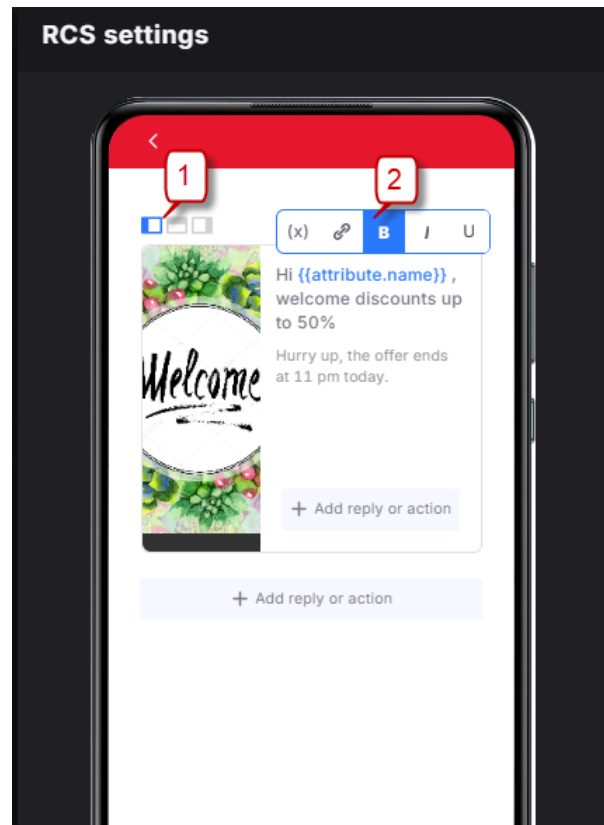


Choosing the rich card layout, image size and text formatting

III. Choose the rich card layout, image size and text formatting:

1. Choose the layout (the option appears on hover).
2. Enter the title text (200 characters max.)
3. Personalize the title and message text with attributes from the [Contacts](#) database.
4. Enter the message text, (2000 characters max.)

An example of vertical layout is shown in the figure below.



Vertical layout

1. Choose the vertical layout.
2. Apply text formatting to the title and message text as appropriate.

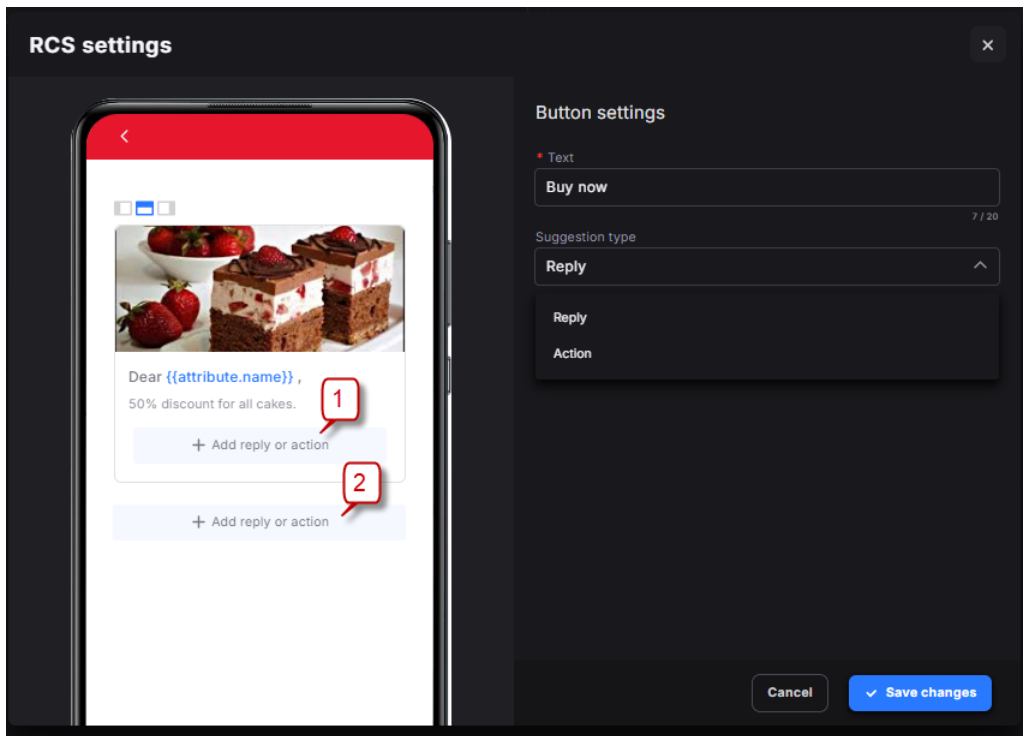
IV. Configure actions and replies.

7.4.2.2 Configuring actions

The user can add interactive blocks to the message (Suggestions). Two types of suggestions are available:

- *Action*: some action that the System performs in the browser once the recipient clicks a button (opens a website, dials a number etc.).
- *Reply*: a word or phrase that the recipient can send back to the System in response to a message.

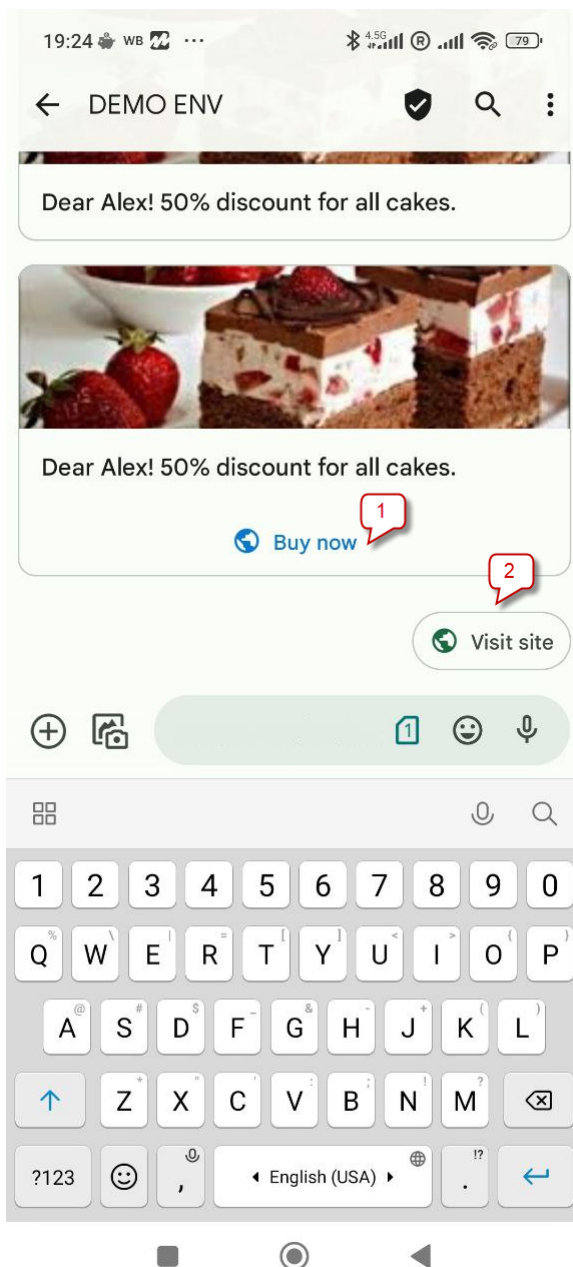
The Rich card message layout contains two panels where *Actions* and *Replies* can be added. Both of them have the same settings and interface, and can be used together.



Configuring actions and replies

1. Panel one is within the message layout and allows maximum 4 actions or replies in any combination.
2. Panel two is outside the message layout and allows maximum 11 actions or replies in any combination.

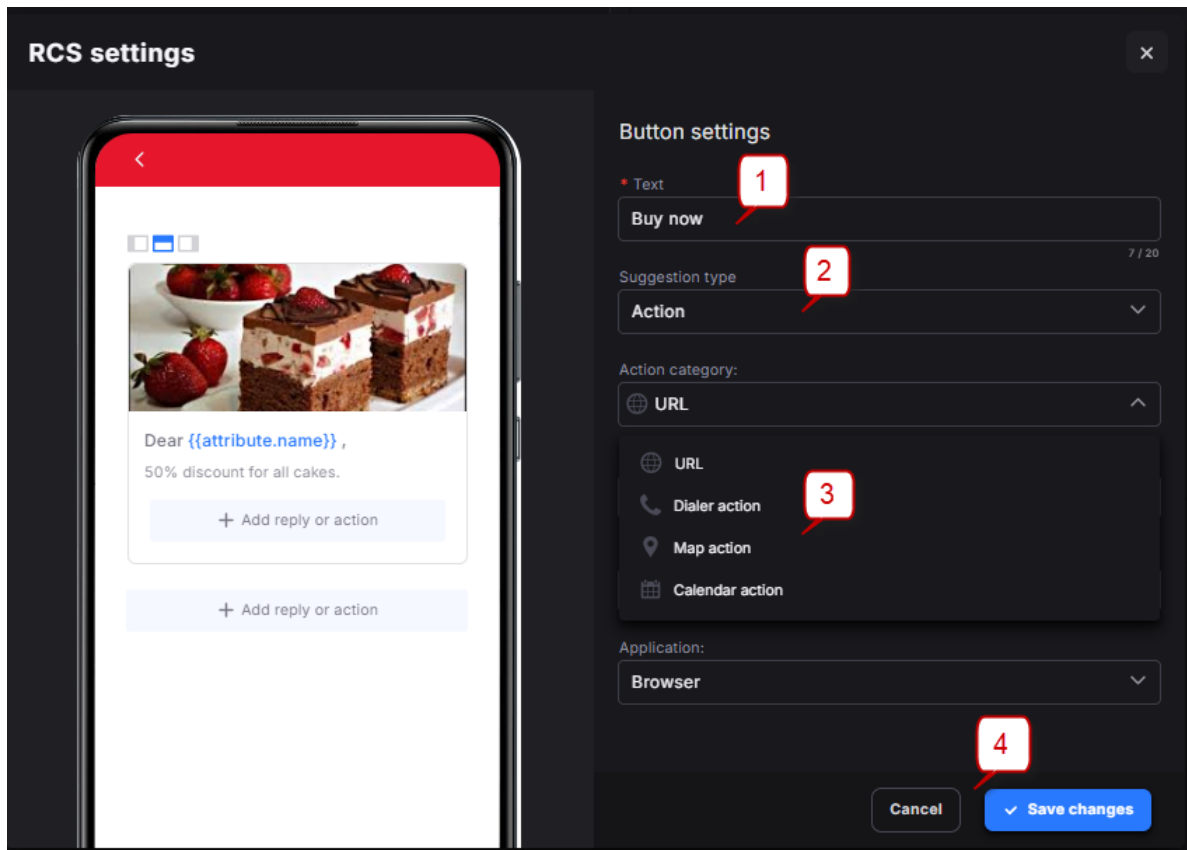
The figure below illustrates panel 1 and panel 2 as seen on the recipient's device.



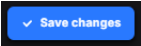

Actions and replies, recipient device view

- 1. Panel one.
- 2. Panel two.

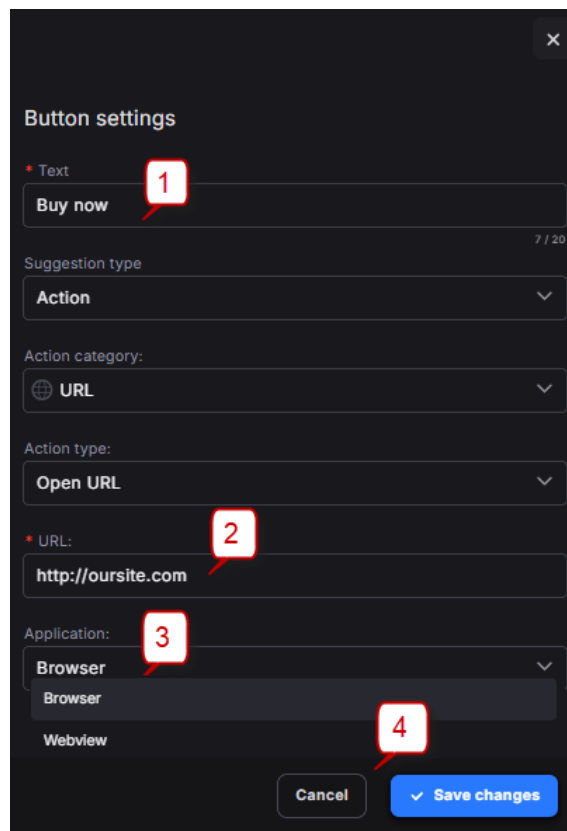
The figure below illustrates settings of interactive blocks (Suggestions) that prompt the user to react a certain way - go to the website, dial the number etc.



Suggestion settings



1. Enter CTA (call-to-action) text. It will be displayed on a button (25 characters max).
2. Choose *Suggestion type*: *Action* or *Reply*.
3. Possible values for *Suggestion type*: *Action* are:
 - *URL action*: the contact is prompted to click a URL;
 - *Dialer action*: the contact is prompted to dial a number;
 - *Map action*: allows showing a location or requesting the contact's location (location push);
 - *Calendar action*: allows setting a date in the calendar (for example, to make an appointment).
4. Click *Save changes*  to apply settings for the current suggestion or *Cancel*  to cancel the changes.

7.4.2.2.1 URL action settings

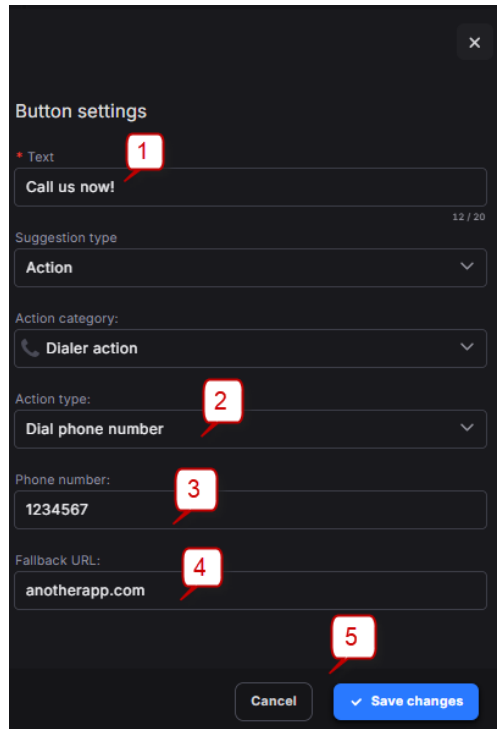


URL action settings

The figure above illustrates URL action settings.

1. Enter the CTA (call-to-action) text.
2. Enter the URL text (must start with http:// or https://)
3. Select the value *Browser*.
4. Click *Save changes*  to apply settings for the current suggestion or *Cancel*  to cancel the changes.

7.4.2.2.2 Dialer action settings



Button settings

Text **1**
Call us now! 12 / 20

Suggestion type
Action

Action category:
Dialer action

Action type: **2**
Dial phone number

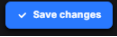

Phone number: **3**
1234567

Fallback URL: **4**
anotherapp.com

5
Cancel Save changes

Dialer action settings

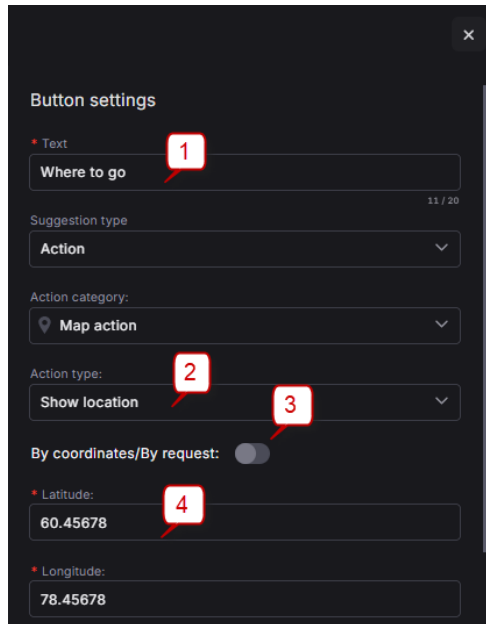
The figure above illustrates dialer action settings.

1. Enter the CTA (call-to-action) text.
2. Choose the action type. Possible values are:
 - o *Dial phone number*;
 - o *Dial enriched call* (not supported by Google): calls that allow sharing content;
 - o *Dial video call* (not supported by Google).
3. Add the phone number to be dialed.
4. Specify an alternative app URL in case it is impossible to complete a task through the default app (for example, Skype or Whatsapp URL).
5. Click *Save changes*  to apply settings for the current suggestion or *Cancel*  to cancel the changes.

7.4.2.2.3 Map action settings

Map action settings include the following options:

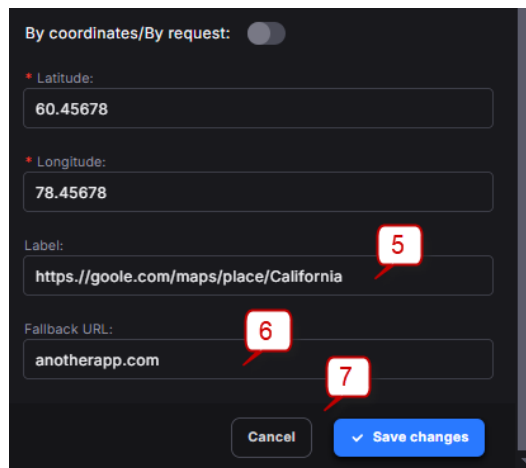
- *Show location*: shows the location by coordinates or by request.
- *Request location push*: request the contact's location.



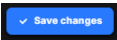

Show location by coordinates

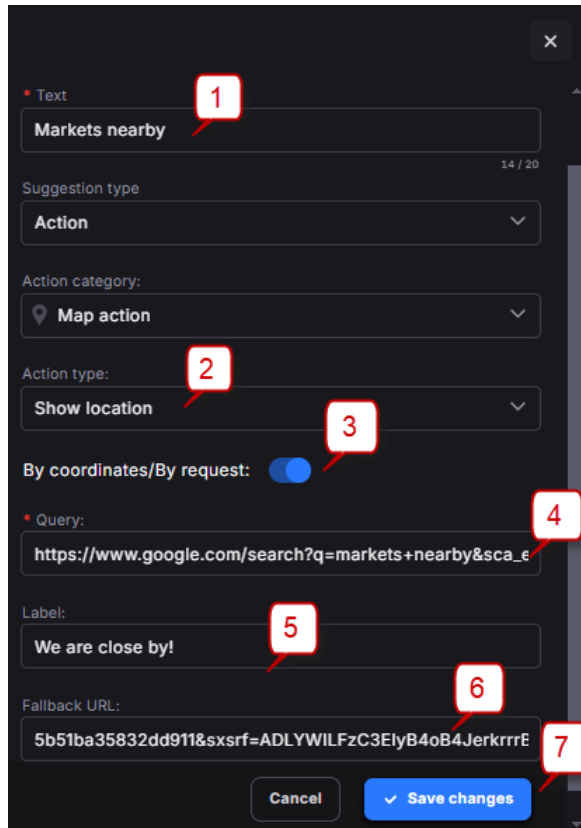
The option *Show location by coordinates* allows showing the location of some specific place, for example, a shop. Proceed as shown in the figure above:

1. Enter the CTA (call-to-action) text.
2. Choose the *Map action* type *Show location*.
3. Use the default switch state *By coordinates* to show the location of a specific place.
4. Specify the coordinates. **Important!** Use decimal values only.



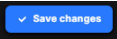

Show location by coordinates (continued)

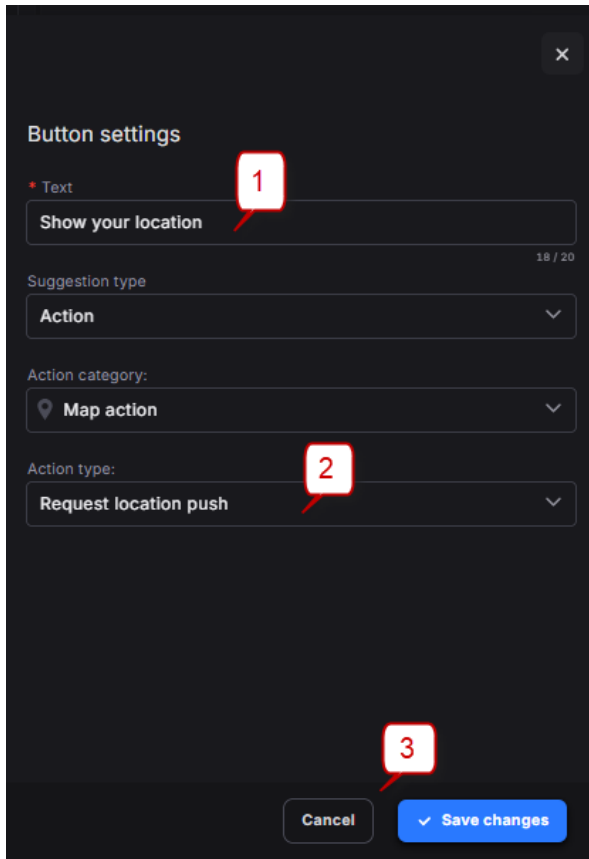
5. Enter the map title.
6. Use an alternative map application in case the standard application fails.
7. Click *Save changes*  to apply settings for the current suggestion or *Cancel*  to cancel the changes.



Show location by request



The option *Show location by request* allows showing a location requested by the user, for example, the nearest shop. Proceed as shown in the figure above:

1. Enter the CTA (call-to-action) text.
2. Choose the *Map action* type *Show location*.
3. Switch the switch to *By request*.
4. Insert the *Query* body according to the CTA text provided in the *Text* field above.
5. Enter the map title.
6. Use an alternative map application in case the standard application fails.
7. Click *Save changes*  to apply settings for the current suggestion or *Cancel*  to cancel the changes.



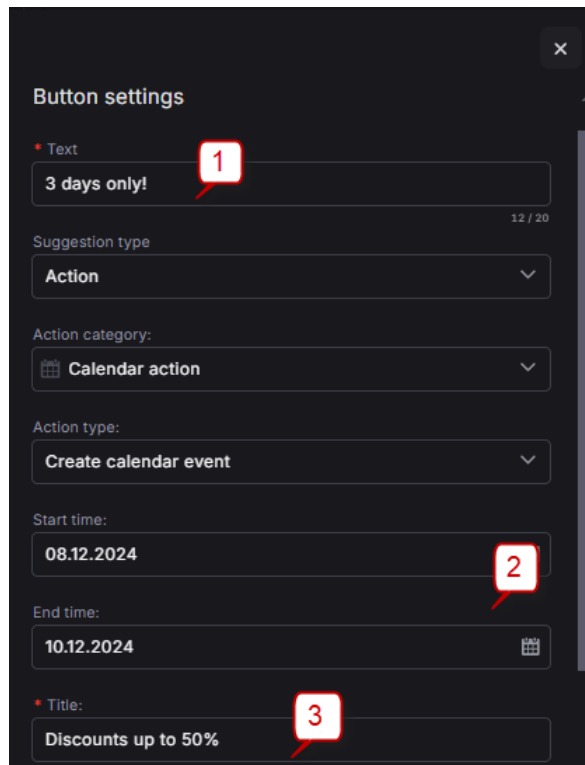
Request location push

This option *Request location push* serves to request the user's location.

1. Enter the CTA (call-to-action) text.
2. Choose the *Map action* type *Request location push*.
3. Click *Save changes*  to apply settings for the current suggestion or *Cancel*  to cancel the changes.

7.4.2.2.4 Calendar action settings

Calendar action settings allow setting time period in the calendar - for example, for an appointment or marketing event.



Button settings

* Text: 3 days only! 12 / 20

Suggestion type: Action

Action category: Calendar action

Action type: Create calendar event

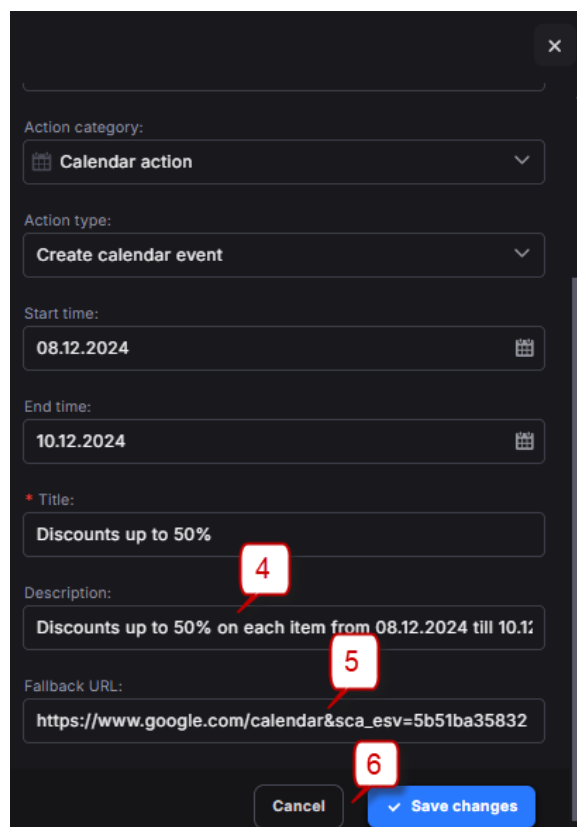
Start time: 08.12.2024 2

End time: 10.12.2024

* Title: Discounts up to 50% 3

Calendar action settings

1. Enter the CTA (call-to-action) text.
2. Select the calendar event period. The recipient can save it in the calendar directly from the message.
3. Enter the event title. It will be displayed in the calendar.



Action category: Calendar action

Action type: Create calendar event

Start time: 08.12.2024

End time: 10.12.2024

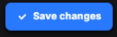

* Title: Discounts up to 50% 4

Description: Discounts up to 50% on each item from 08.12.2024 till 10.12.2024 5

Fallback URL: https://www.google.com/calendar&sca_esv=5b51ba35832

Cancel 6 Save changes

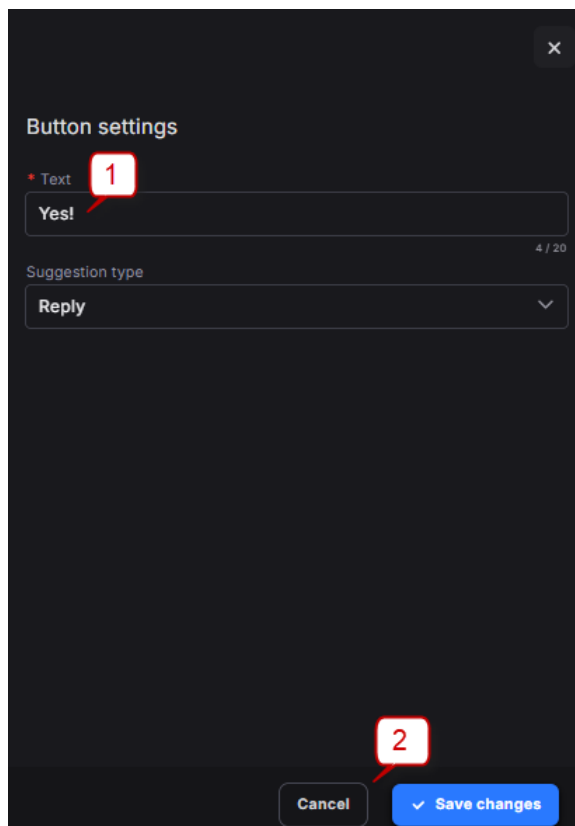
Calendar action settings (continued)

4. Enter the event description. It will be displayed in the calendar.
5. Specify an alternative application URL in case it is impossible to complete the task through the default application.
6. Click *Save changes*  to apply settings for the current suggestion or *Cancel*  to cancel the changes.

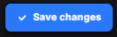

7.4.2.3 Configuring replies

7.4.2.3.1 Suggestion type Reply

The suggestion type *Reply* allows configuring a reply button with predefined text (for example, "Call me"). When the recipient clicks it, an automatic reply with the text is sent to the System.



Suggestion type Reply

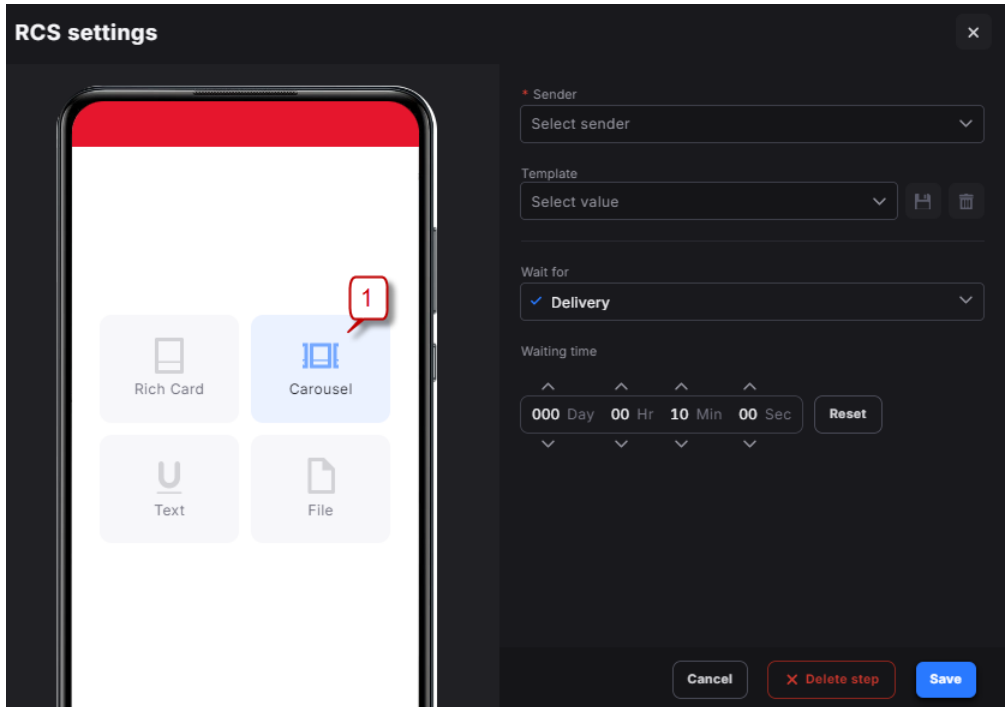
1. Enter the reply button text.
2. Click *Save changes*  to apply settings for the current suggestion or *Cancel*  to cancel the changes.

7.4.2.4 Carousel

An RCS carousel is a horizontally scrollable carousel of up to 12 vertical rich cards. Each card can include the following blocks:

- Title text;
- Message text;

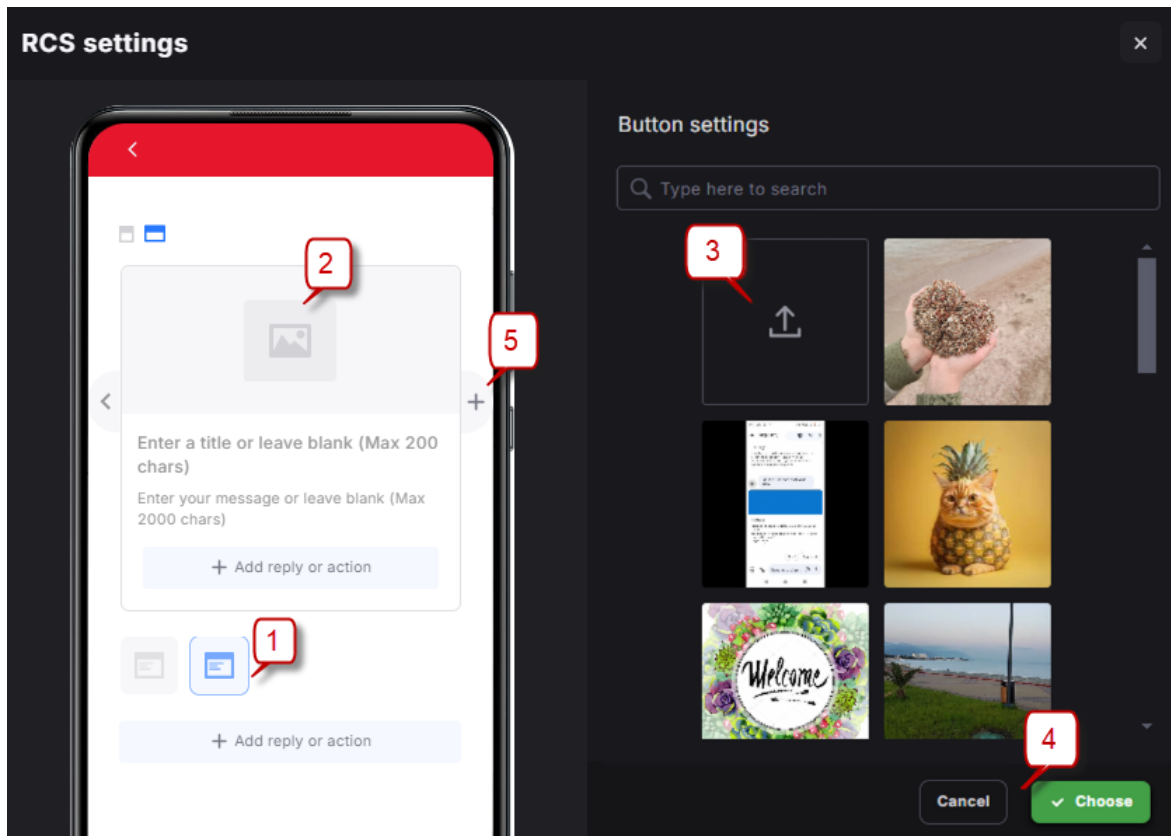
- Image (which will be placed above the title, message text and buttons) - the image is not required in a card;
- One or more buttons with suggestions (for more detail see [Message constructor\RCS message settings\Configuring actions and replies](#)⁽⁴¹⁾):



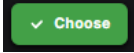

Select Carousel message format

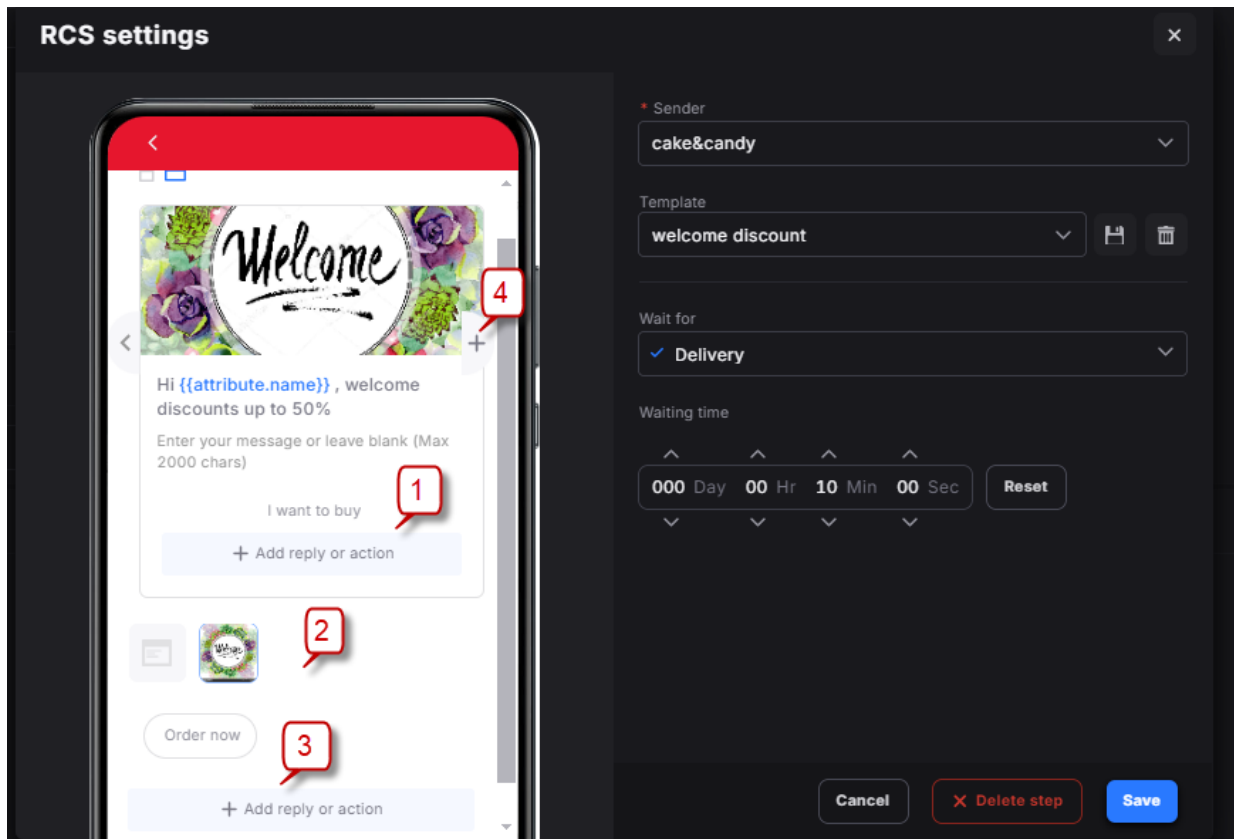
Go to *RCS message settings* and select *Carousel* as shown in the figure above (1).

Create cards one by one, up to 12.



Selecting images for a carousel

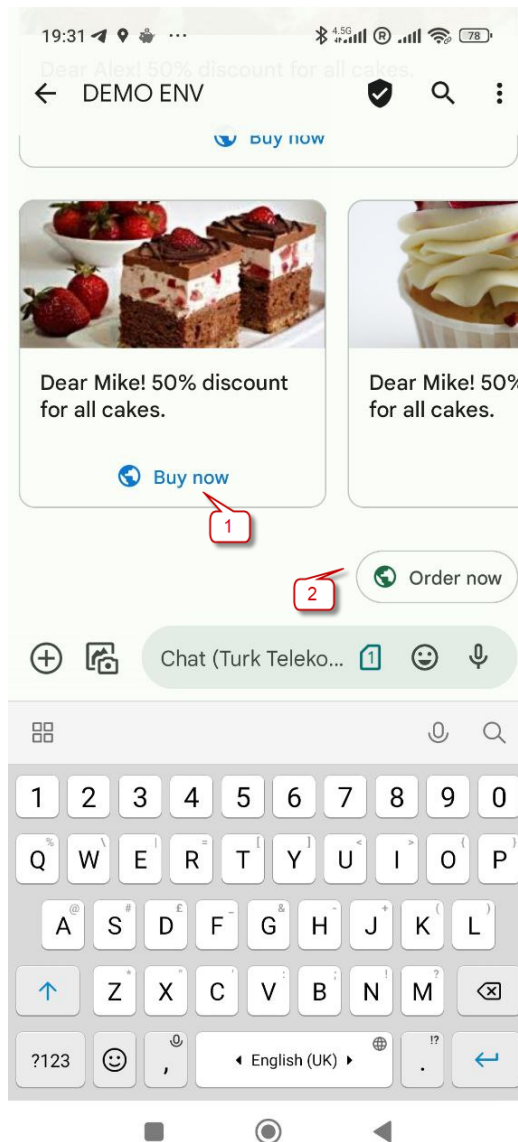
1. Click on a card placeholder.
2. Click to select an image from the database or from your device.
3. Click to select and upload an image from your device. It will be saved for the message and in the [Media content database](#) as well.
4. Click *Choose*  to choose the file or *Cancel*  to discard the changes.
5. Click to add more rich cards (up to 11).



Creating a rich card

1. Configure actions displayed within the card layout (Rich card setting is described [above](#)^[37]).
2. See how existing cards are displayed in the message template.
3. Configure actions applicable to all cards in the carousel.
4. Click to add more cards to the carousel.

The figure below shows the carousel as viewed by the recipient.



Recipient device view

1. Actions in a single card.
2. Actions in a message.

7.4.3 Viber message settings

This section describes possible Viber message types and layouts. Messages of the following types (formats) are available:

- *Text only*: text only (max length is 1,000 symbols).
- *File*: files (allowed formats are: .jpg, .jpeg, .png, .bmp, .gif, .svg, .mp4, .csv, .doc, .docx, .dot, .dotx, .eps, .fods, .fodt, .info, .odf, .ods, .odt, .pdax, .pdf, .rtf, .txt, .xls, .xlsx, .xltx, .xps, xlsx). Max file size 200 MB.
- *Text+Button*: text plus an action button that prompts the recipient to go to a website.
- *Text+Media+Button*: text and image plus an action button that prompts the recipient to go to a website.

NOTE: The following formats are supported for files sent through Viber:

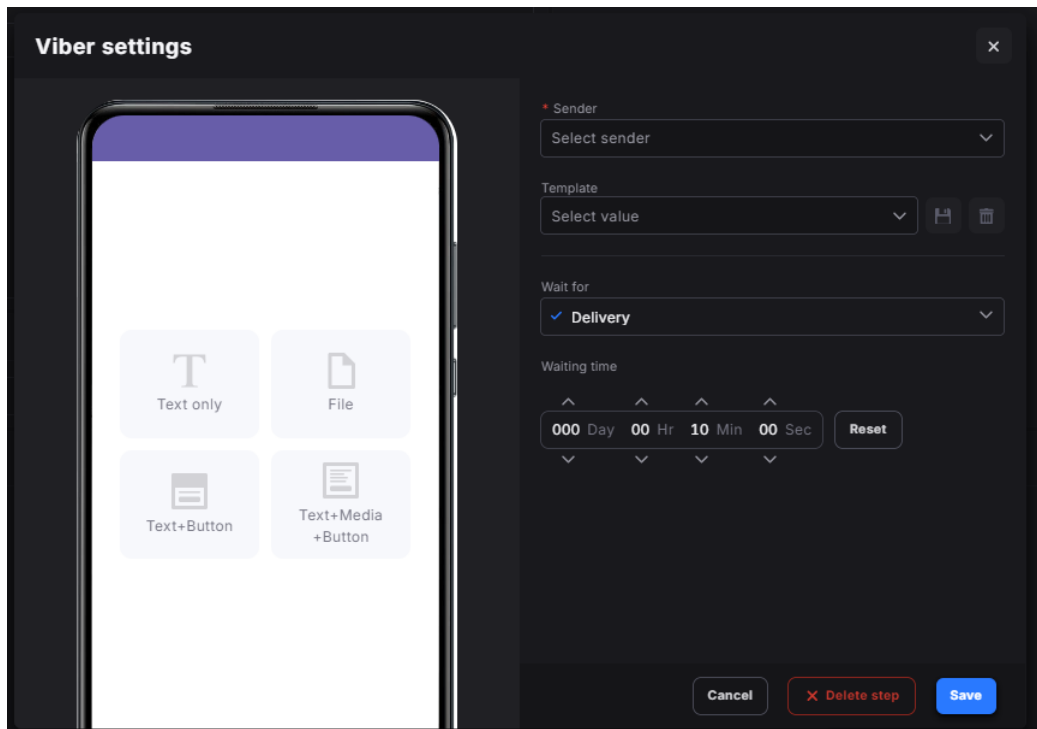
Media: .jpg, .jpeg, .png, .bmp, .gif, .svg; Video: .mp4;

Documents: .csv, .doc, .docx, .dot, .dotx, .eps, .fods, .fodt, .info, .odf, .ods, .odt, .pdax, .pdf, .rtf, .txt, .xls, .xlsx, .xltx, .xps, xlsx).

Follow the instructions detailed below for configuring the message content for various Viber formats.

Configure the channel-independent message parameters as detailed in [Message constructor](#) ³⁵.

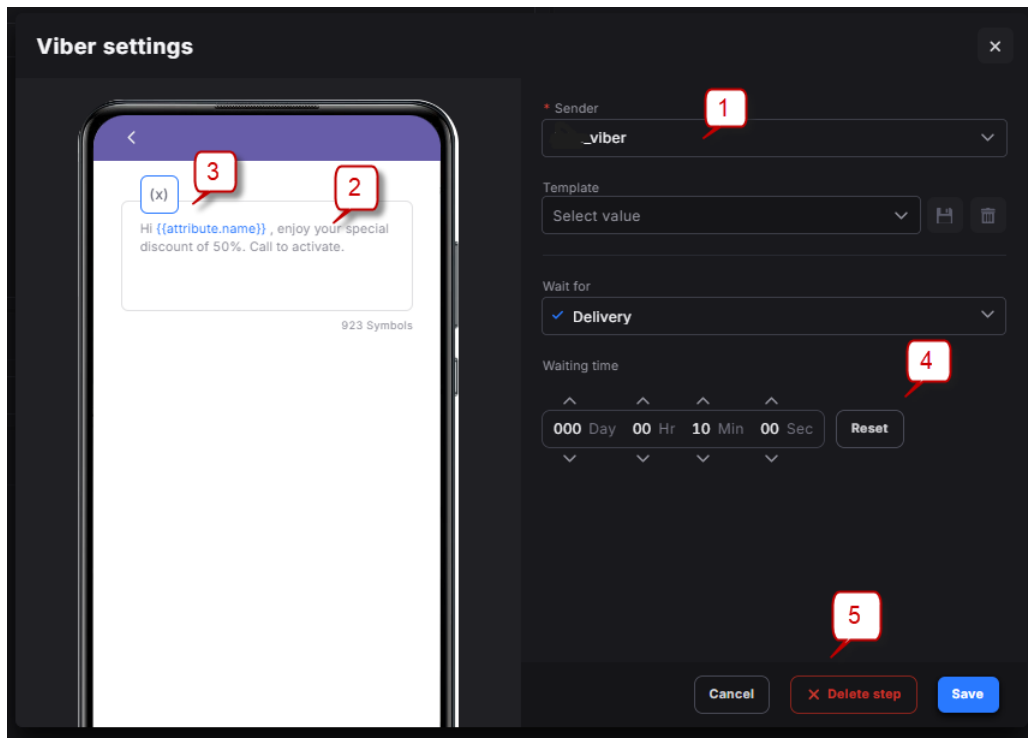
Select the message type (*Text only*, *File*, *Text+Button* or *Text+Media+Button*).



Viber message settings

The figures below illustrate how to configure each message type.

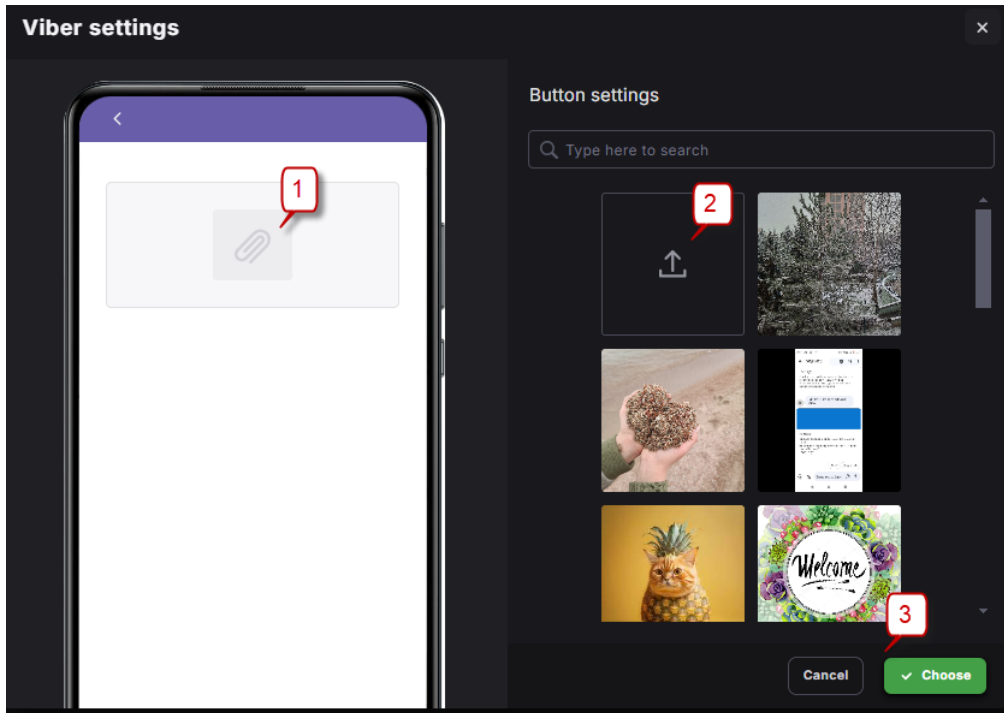
1. Text only





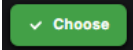

Viber Text only message settings

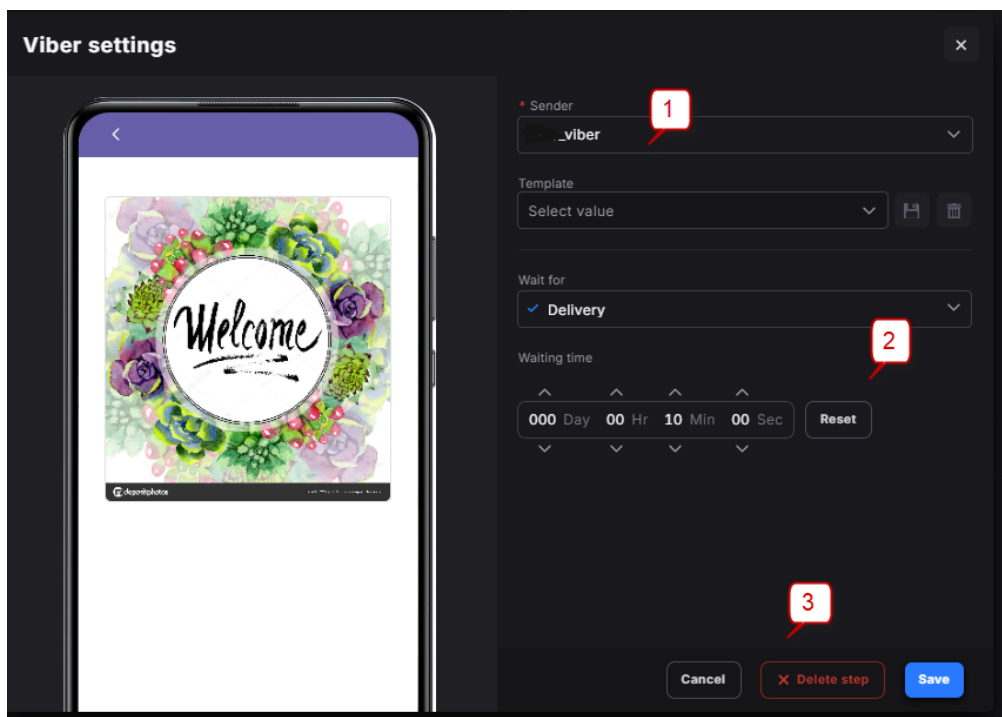
1. Select the Sender ID.
2. Type the message text. Concatenated messages are supported.
3. Personalize the message with data from the recipient's profile in the [Contacts](#) database.
4. Configure the channel-independent message parameters.
5. Save the message to run or schedule broadcasts. Click *Delete step* to delete this step from the fallback chain or click *Cancel* to cancel the changes in the message settings.

2. File

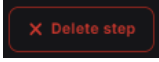



Viber File message settings

1. Click  to add a picture from the [Media content database](#)^[142] or to upload a picture from your device.
2. Click  to upload a picture from your device or choose a picture from the [Media content database](#)^[142]. It will be saved for the message and in the [Media content database](#)^[142] as well.
3. Click *Choose*  to choose the file or *Cancel*  to discard the changes.



Viber File message settings (continued)

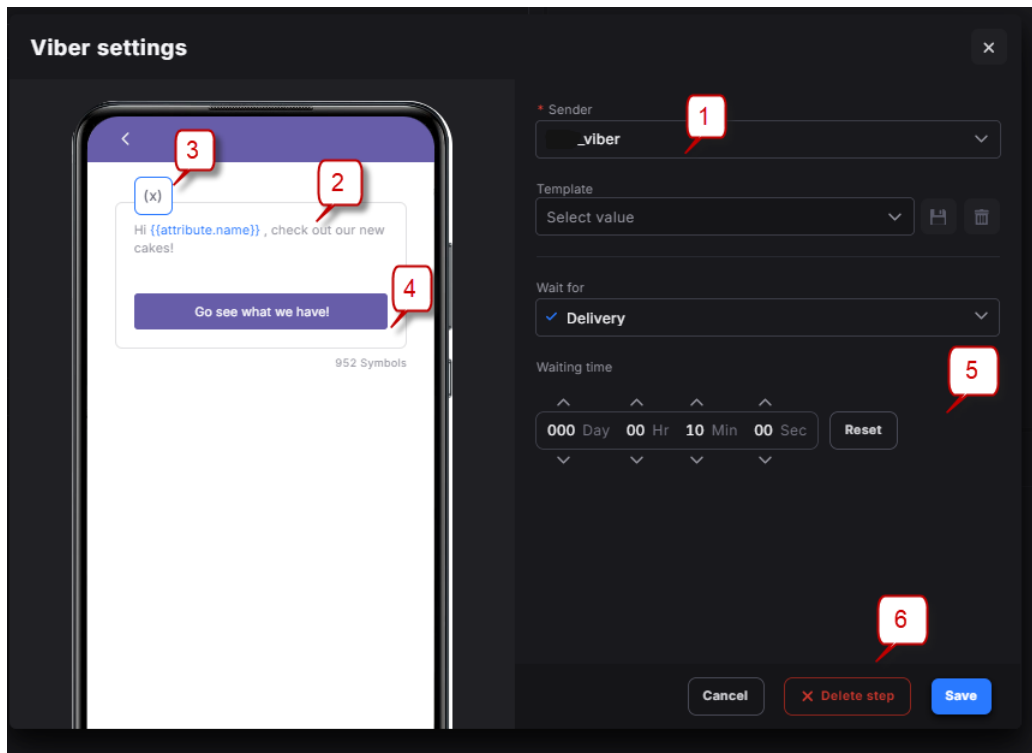
1. Select the Sender ID.
2. Configure the channel-independent message parameters.
3. Save the message to run or schedule broadcasts. Click *Delete step*  to delete this step from the fallback chain or click *Cancel*  to cancel the changes in the message settings.




Viber File message view

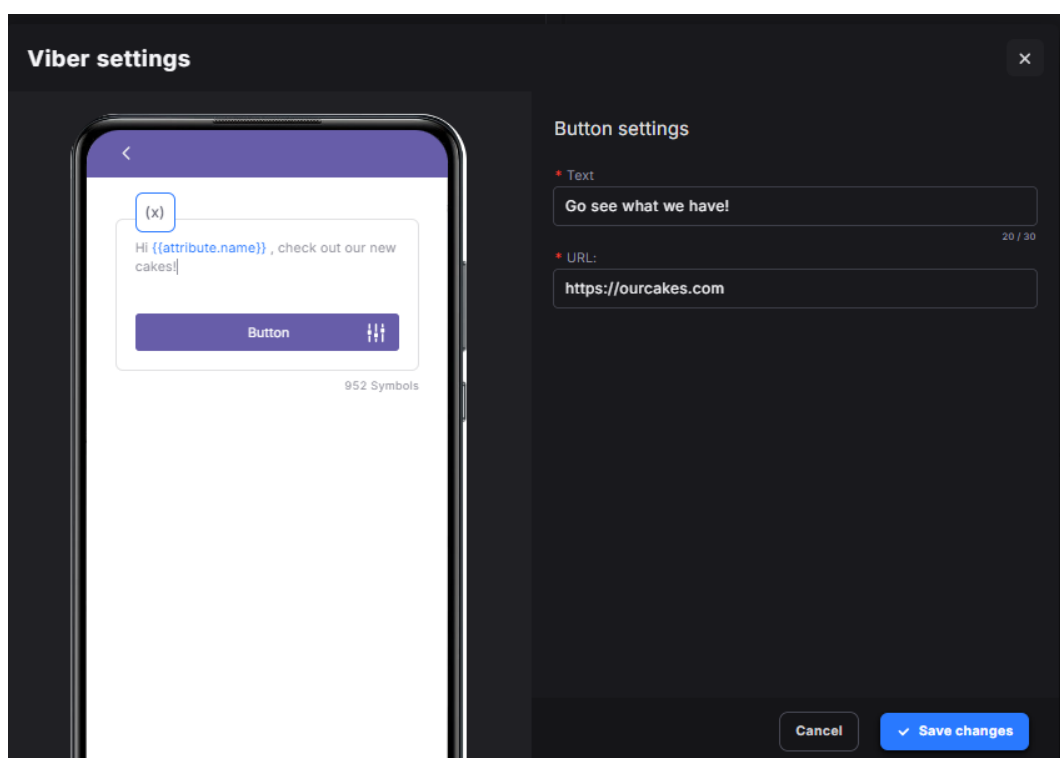
3.Text+Button

Text+Button messages allow sending text and an action button that prompts the user to go to a website.

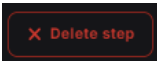
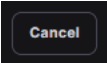


Viber Text+Button message settings

1. Select the Sender ID.
2. Type the message text. Concatenated messages are supported.
3. Personalize the message with data from the recipient's profile in the [Contacts](#) database.
4. Click to configure the button text and URL (hover to view the  control).

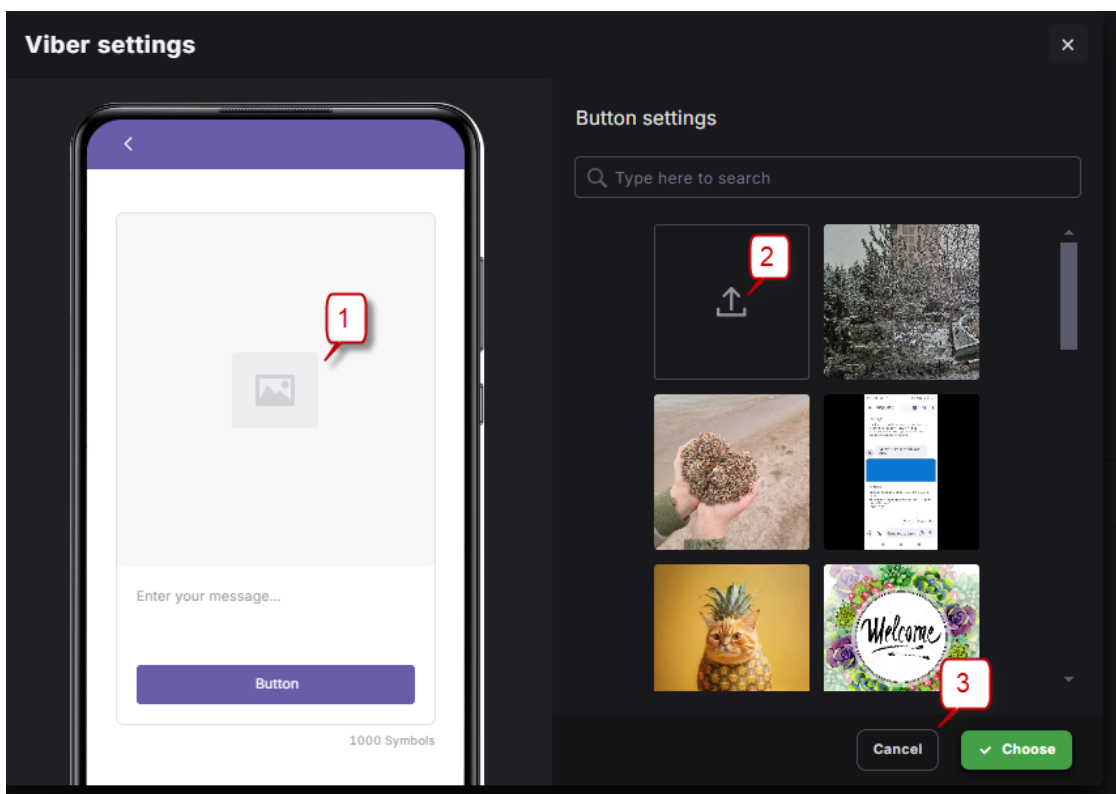


Viber Button settings



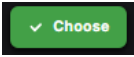

5. Configure the channel-independent message parameters and save the message.
6. Save the message to run or schedule broadcasts. Click *Delete step*  to delete this step from the fallback chain or click *Cancel*  to cancel the changes in the message settings.

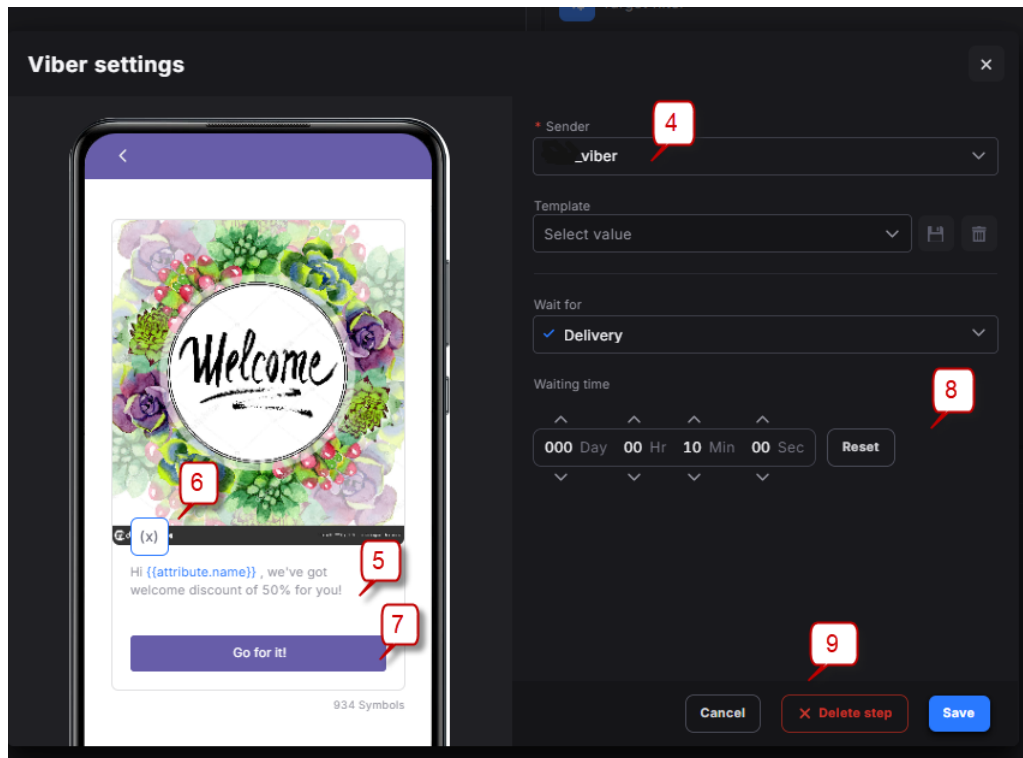
4. Text+Media+Button

Text+Media+Button messages allow sending text, media and an action button that prompts the user to go to a website.



Viber Text+Media+Button message settings

1. Click  to add a picture from the [Media content database](#) ^[142] or to upload a picture from your device.
2. Click  to upload a picture from your device or choose a picture from the [Media content database](#) ^[142]. It will be saved for the message and in the [Media content database](#) ^[142] as well.
3. Click *Choose*  to choose the file or *Cancel*  to discard the changes.



Viber Text+Media+Button message settings (continued)

4. Select the Sender ID.
5. Type the message text. Concatenated messages are supported.
6. Personalize the message with data from the recipient's profile in the [Contacts](#) database.
7. Click to configure the button text and URL (see the figure above).
8. Configure the channel-independent message parameters.
9. Save the message to run or schedule broadcasts. Click *Delete step* to delete this step from the fallback chain or click *Cancel* to cancel the changes in the message settings.

7.4.3.1 Viber sessions

Sessions allow two-way communication with customers in one chat, and billing per conversation instead of per message delivered.

Session definitions and configurations:

- A session is activated when the customer initiates a conversation with your service and there is no active session already.
- Once a customer sends a message to your business, a 24-hour time frame will be opened in which you can reply with a session type message (i.e *Text only* or *Image only*). These messages are billed not individually per message but as a single session.
- When you reply to the customer with a session type message, during the 24-hour time frame, a session ID will be produced and specified in each response to subsequent messages within this session.

There are certain limitations to sessions:

- A single session is limited to 60 messages sent to the customer.
- Upon reaching the 60-message limit, the session will end.
- A new session will begin if the customer responds; this will trigger a new session ID after you respond.

Consecutive message limitation:

- You can send up to 10 consecutive session-type messages without a customer response.
- The 11th session-type message will result in an error and won't be sent.
- You will be able to send the next session type messages within the same session only if the customer responds again within the session time frame.

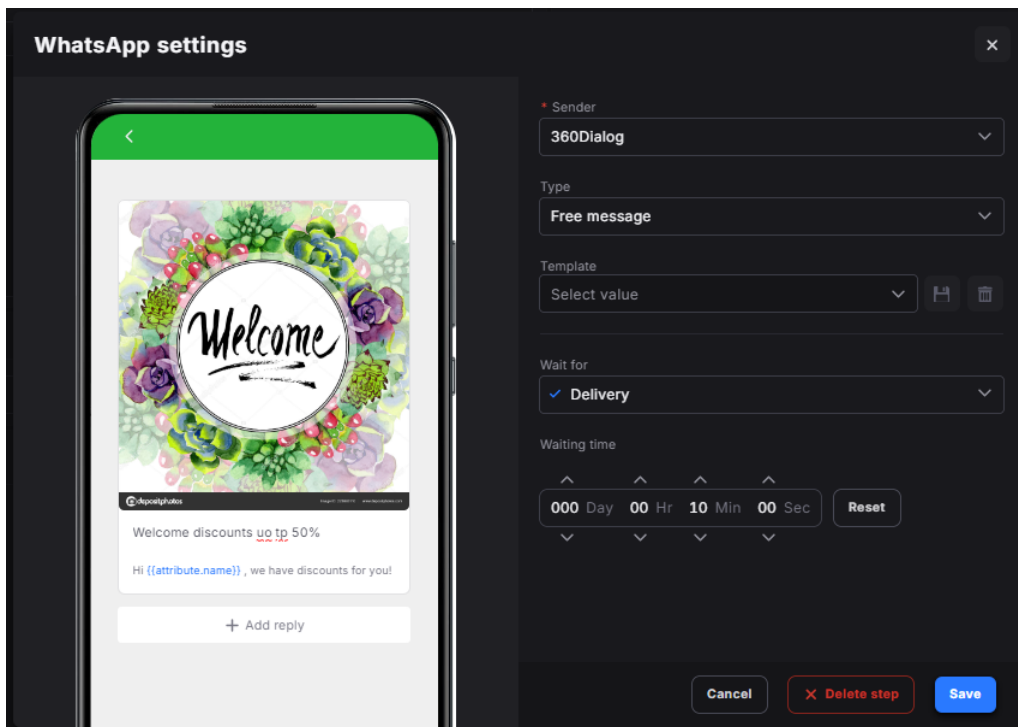
7.4.4 WhatsApp message settings

This section describes WhatsApp message settings. Messages of the following types are available:

- *Free message*: free-flowing messages that support all media types.
- *Template*: messages that use pre-approved message templates (configured at [Assets\WhatsApp templates](#) ⁽¹⁶⁰⁾).

NOTE: Most communication with the recipient must start with a Template-based message, therefore it is recommended to use Template-based messages in broadcasts, and Free messages in chatbots. Only companies that have the Verified status at WhatsApp can start communication with recipients with a Free message.

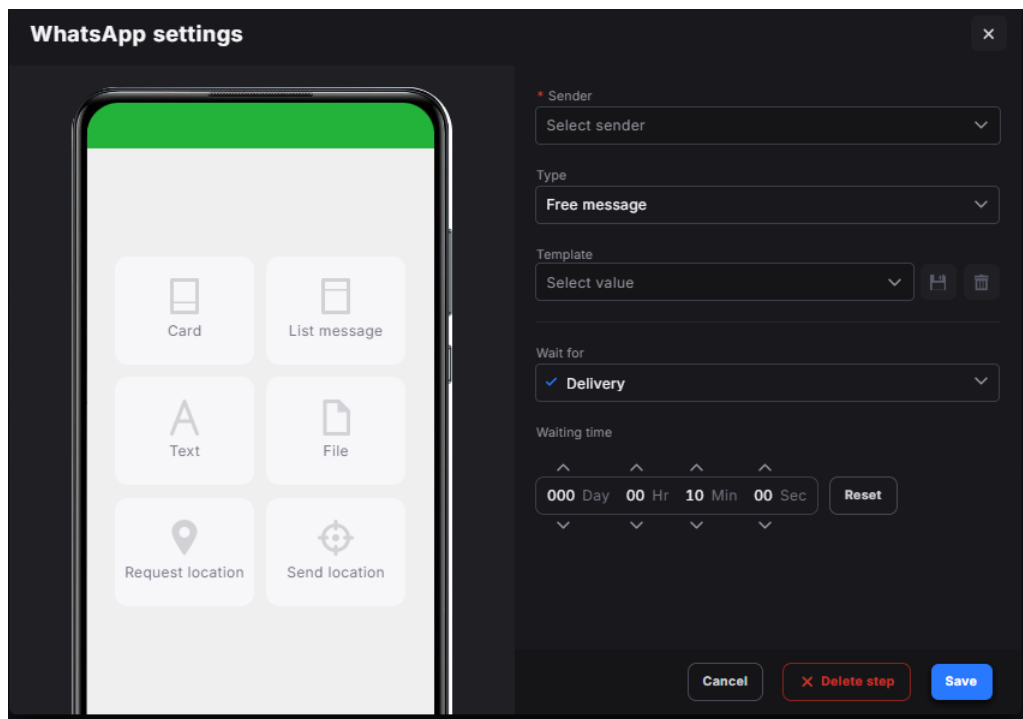
The WhatsApp message settings are illustrated in the figure below.



WhatsApp message settings

7.4.4.1 Free message

Free-flowing messages support the following media types:



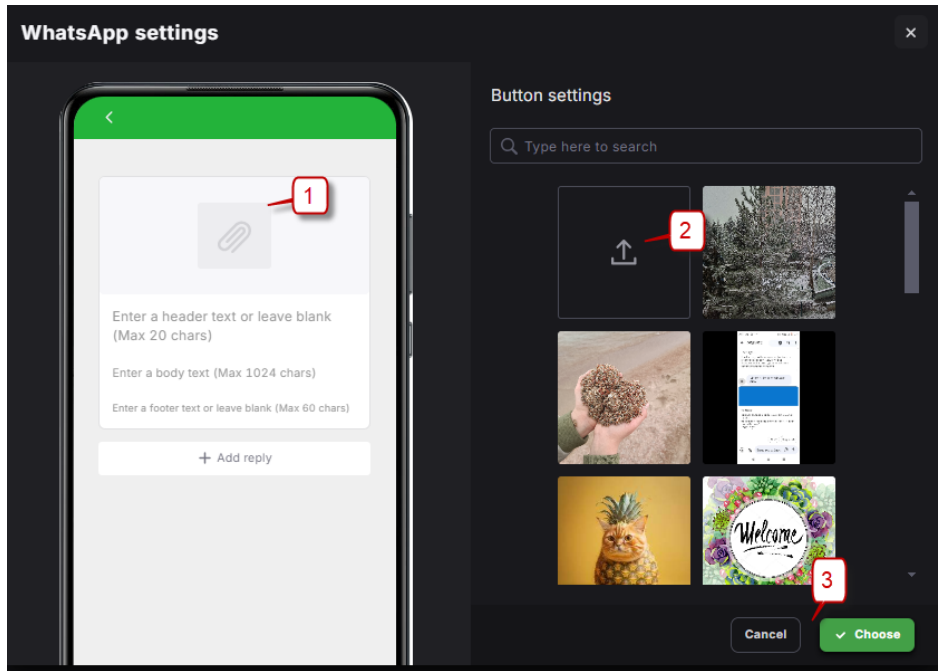
Free message

- *Card*: send images, media and other file types, as well as text and user reply buttons;
- *List message*: interactive messages that allow sending multiple buttons of product descriptions to the user;
- *Text*;
- *File*;
- *Request location*: request the user's location;
- *Send location*: send location to the user.



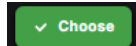

NOTE: The following formats are supported for files sent through WhatsApp: Images: JPG, JPEG, PNG, WEBP*; Audio: OGG**, AMR, 3GP, AAC, MPEG; Documents: PDF, DOC, DOCX, PPTX, XLSX; Video: MP4 (with H. 264 video codec and AAC audio)

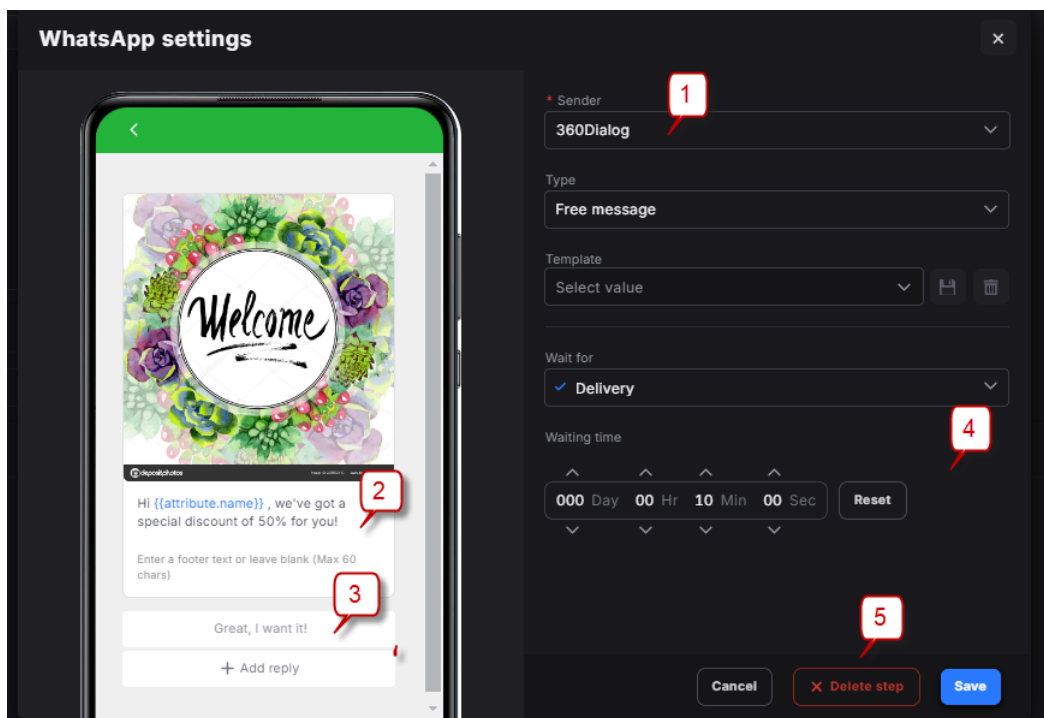
Follow the instructions detailed below for configuring the message content for various WhatsApp formats. Configure the channel-independent message parameters as detailed in [Message constructor](#)^[35].

1. Card

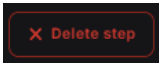



WhatsApp Card message settings

1. Click  to add a picture from the [Media content database](#)^[142] or to upload a picture from your device.
2. Click  to upload a picture from your device or choose a picture from the [Media content database](#)^[142]. It will be saved for the message and in the [Media content database](#)^[142] as well.
3. Click *Choose*  to choose the file or *Cancel*  to discard the changes.

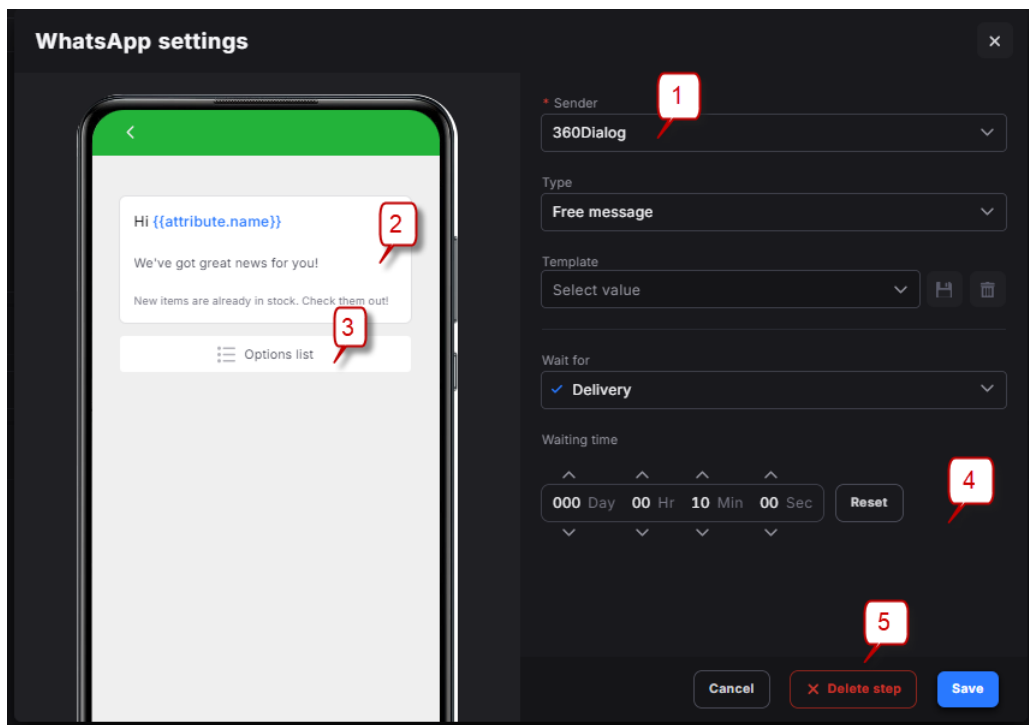


WhatsApp Card message settings (continued)

1. Select the Sender ID.
2. Enter a header text (maximum 20 symbols) or leave blank, type the message text (maximum 1024 symbols), enter a footer text (up to 60 symbols) or leave blank.
3. Click to configure the button text for the user's reply.
4. Configure the channel-independent message parameters.
5. Save the message to run or schedule broadcasts. Click *Delete step*  to delete this step from the fallback chain or click *Cancel*  to cancel the changes in the message settings.

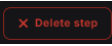

2. List message

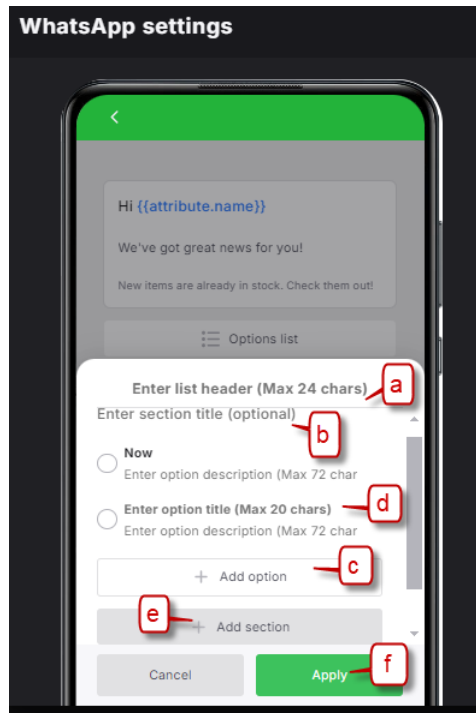
List messages allow you to present WhatsApp users with a list of options to choose from (options are defined as rows in the request payload). When a customer taps the button in the message, it displays a modal that lists the options available.



WhatsApp Menu options message settings

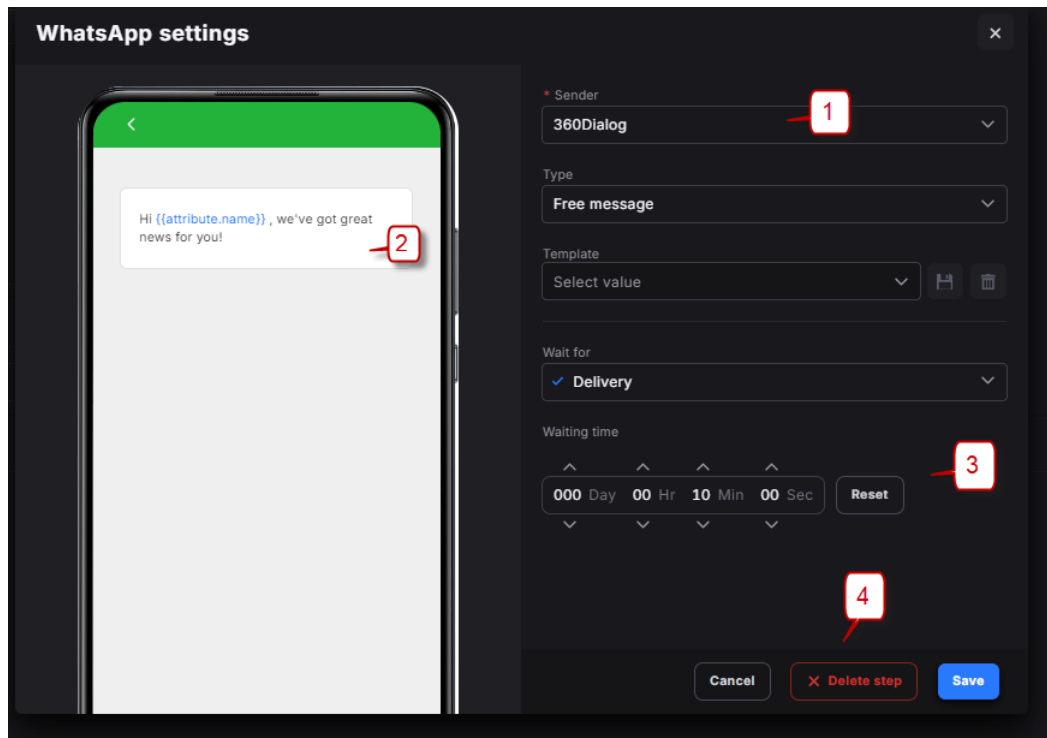
1. Select the Sender ID.
2. Configure the header (optional), message text (required) and footer (optional).
3. Click to configure the user response options (see figure below). The maximum number of options in a list is 10, the maximum length of each option is 24 symbols. The recipient can select only one option from the list. Recipient responses can be grouped in sections, each having a number of response options:
 - a. Type the header for the entire list.
 - b. Enter the section header.
 - c. Click to add a response option.

- d. Enter the option title (required) and description (optional).
 - e. Add another section if necessary.
 - f. Click *Apply* to save the changes and close the form.
4. Configure the channel-independent message parameters.
5. Save the message to run or schedule broadcasts. Click *Delete step*  to delete this step from the fallback chain or click *Cancel*  to cancel the changes in the message settings.

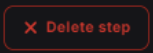



Configuring user response options

3.Text

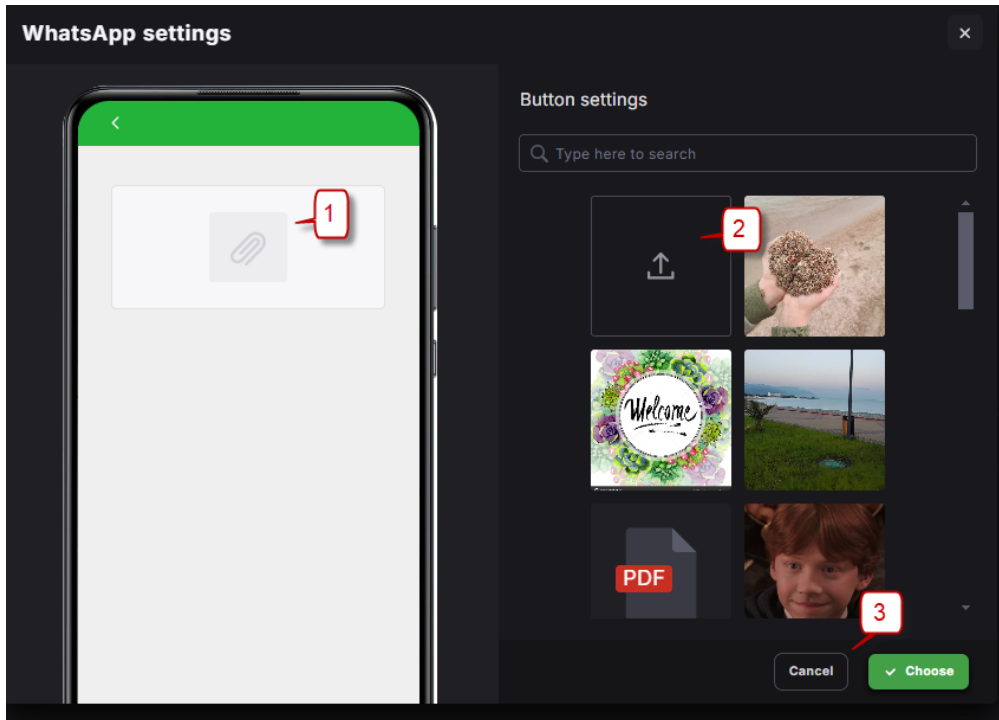


WhatsApp Text message settings



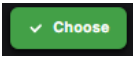

1. Select the Sender ID.
2. Enter the message text (maximum 4096 symbols).
3. Configure the channel-independent message parameters.
4. Save the message to run or schedule broadcasts. Click *Delete step*  to delete this step from the fallback chain or *Cancel*  to cancel the changes in the message settings.

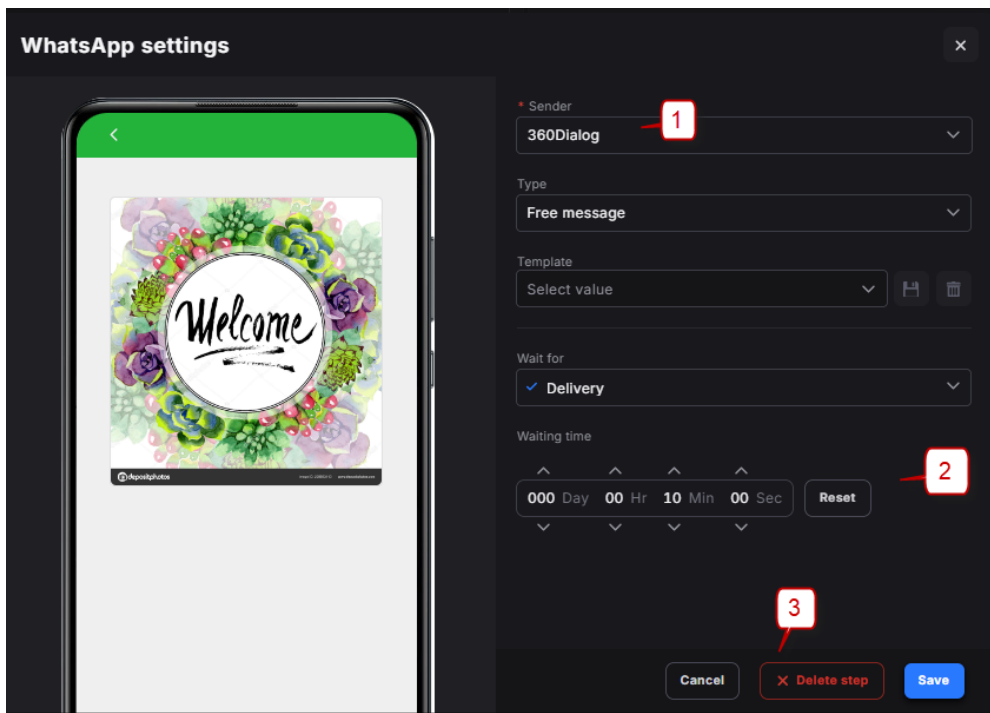
4. File

File messages serve for sending files.

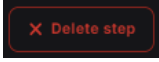
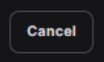


WhatsApp File message settings

1. Click  to add a picture from the [Media content database](#)^[142] or to upload a picture from your device.
2. Click  to upload a picture from your device or choose a picture from the [Media content database](#)^[142]. It will be saved for the message and in the [Media content database](#)^[142] as well.
3. Click *Choose*  to choose the file or *Cancel*  to discard the changes.

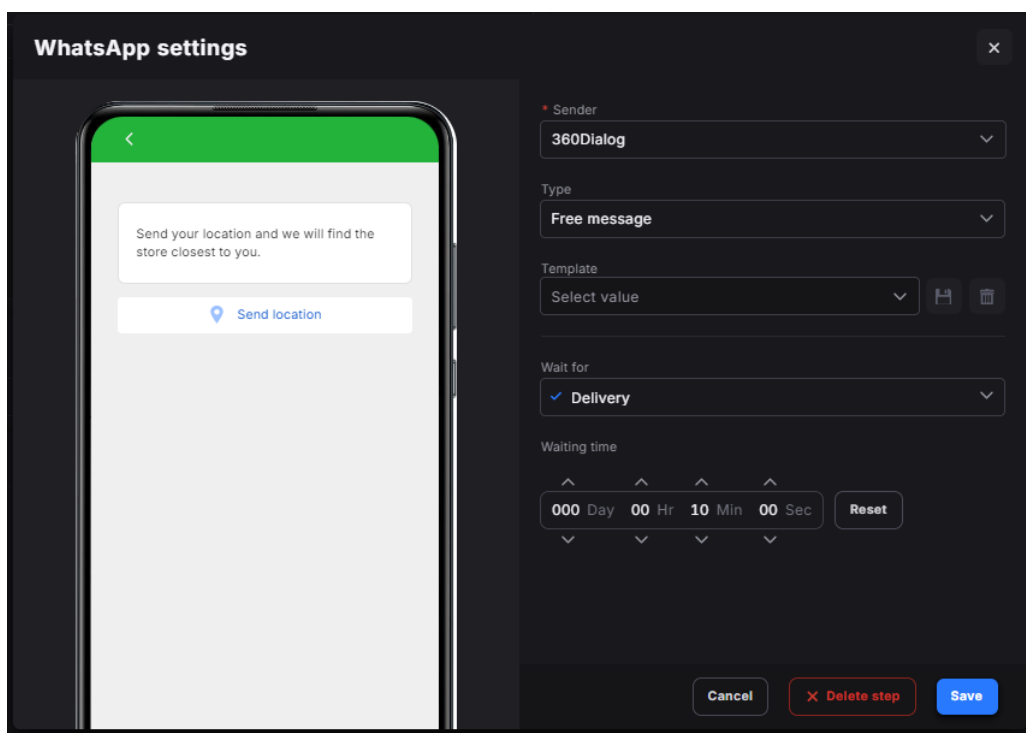


WhatsApp File message settings (continued)

1. Select the Sender ID.
2. Configure the channel-independent message parameters.
3. Save the message to run or schedule broadcasts. Click *Delete step*  to delete this step from the fallback chain or *Cancel*  to cancel the changes in the message settings.

5. Request location

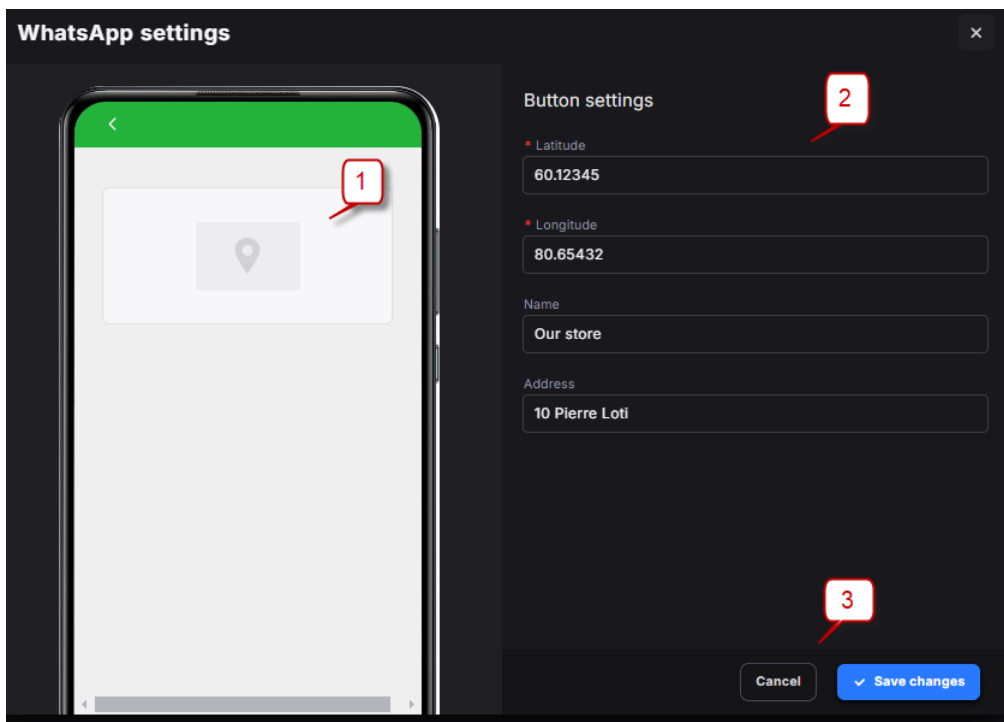
This message type serves to request the user to send their location. Enter the message text, configure the channel-independent message parameters and save the message.



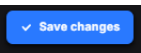

WhatsApp Send location message settings

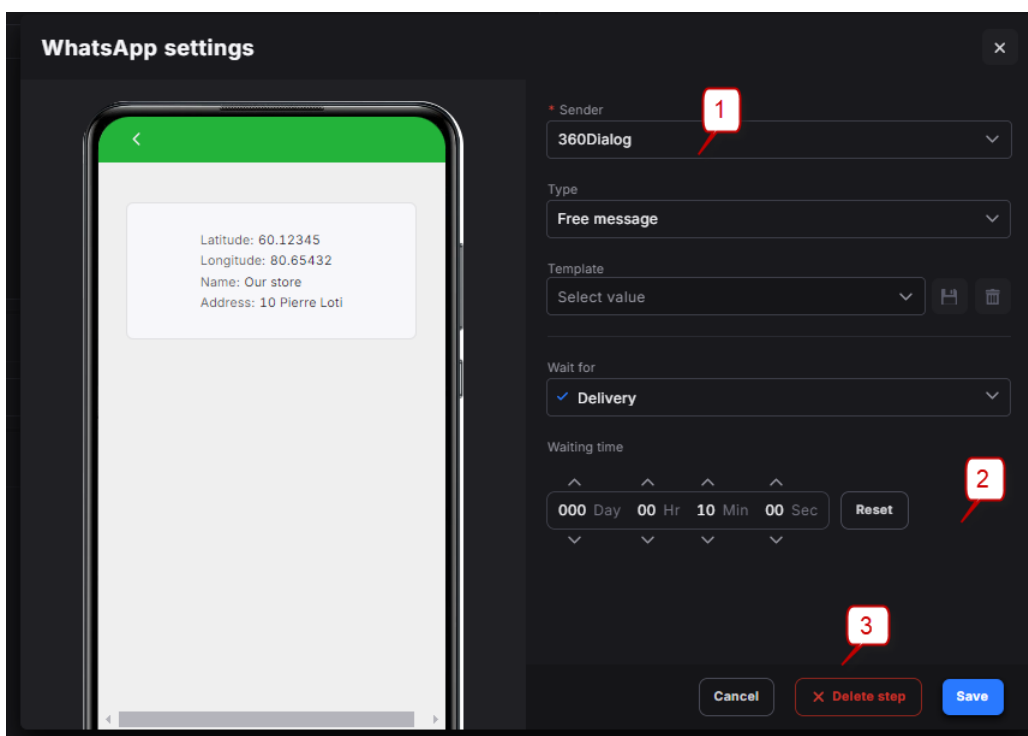
5. Send location

This message type serves to send the user a location by coordinates.



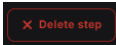
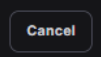
WhatsApp Get location message settings

1. Click to open location settings.
2. Enter the latitude and longitude, name and address.
3. Click *Save changes*  to apply settings or *Cancel*  to discard the changes.



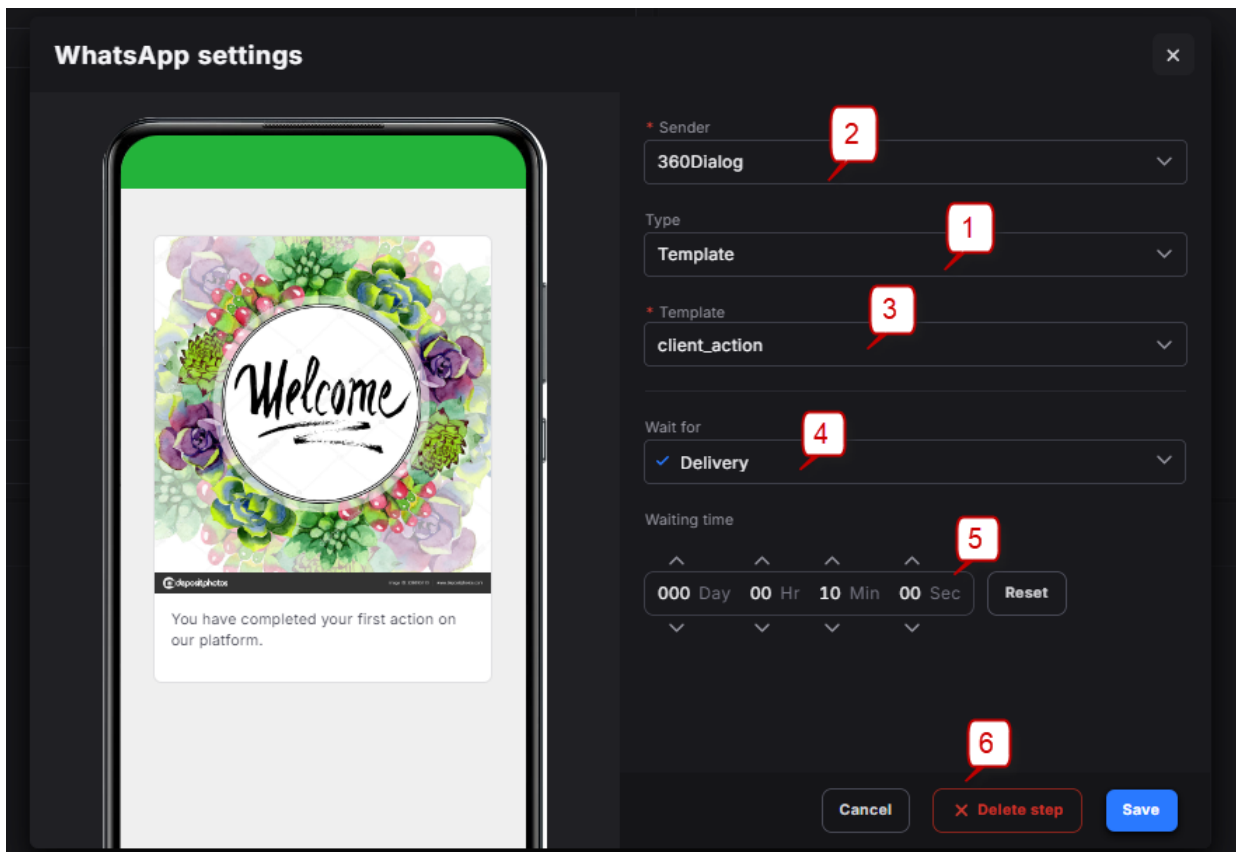
WhatsApp Get location message settings (continued)

1. Select the Sender ID.

2. Configure the channel-independent message parameters.
3. Save the message to run or schedule broadcasts. Click *Delete step*  to delete this step from the fallback chain or *Cancel*  to cancel the changes in the message settings.

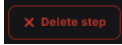

7.4.4.2 Template

This message type utilizes pre-approved message templates configured at [Assets\WhatsApp templates](#)¹⁶⁰. To create a template-based message, follow the instructions below. For more detail on WhatsApp templates refer to [Assets\WhatsApp templates](#)¹⁶⁰.



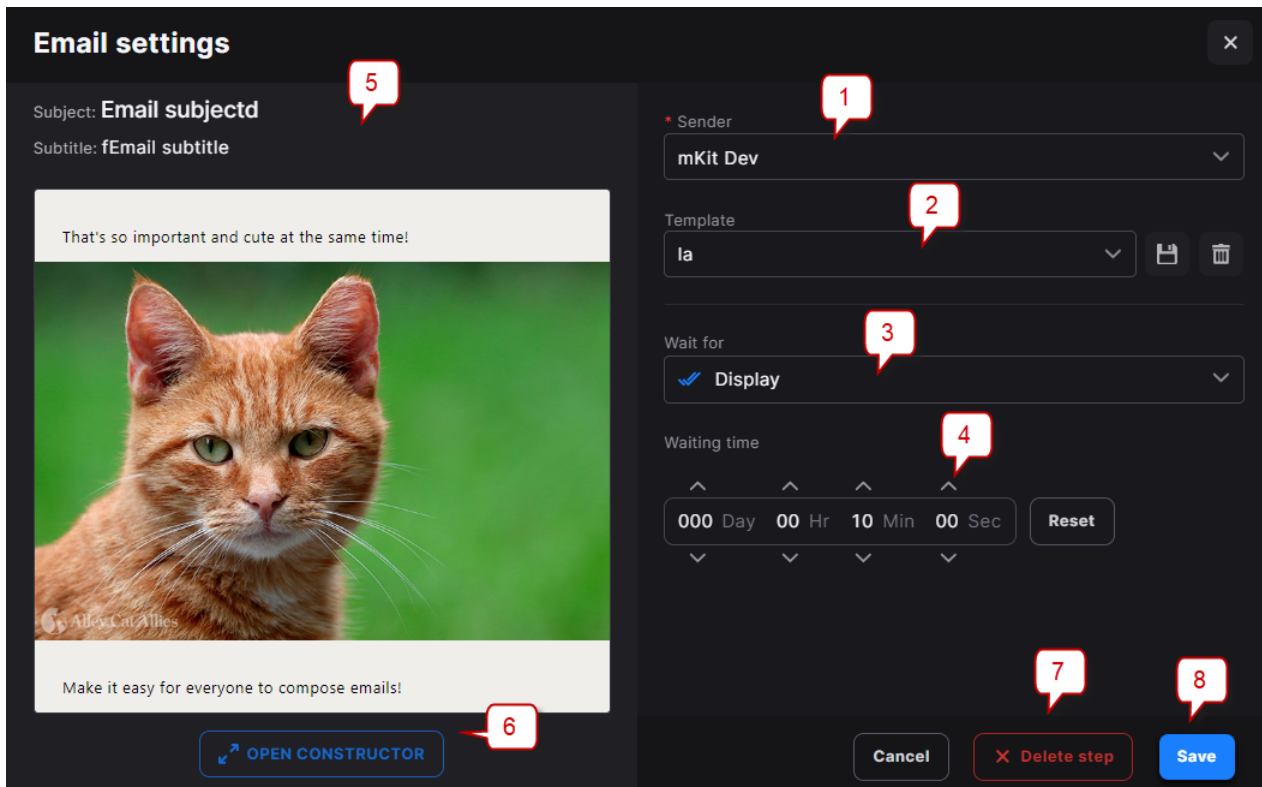
Template-based message

1. Select *Template* as the message type.
2. Select the Sender ID.
3. Select the template (only those with the *Approved* status are available).
4. Choose the criterion for the message success. Possible values are:
 - a. *Delivery*: the message is considered successful if it has been delivered to the recipient's device (the "delivered" DLR report has been received for it).
 - b. *Submit*: the message is considered successful if it has been submitted (a successful submit_sm_response has been received from the vendor).
 - c. *Display*: the message is considered successful if it was opened on the recipient device (the "displayed"/"display success" DLR report has been received for it).



5. Specify the waiting time. If it expires before the message sending is considered successful (based on (4) in the figure above), the System will attempt sending it through the next-in-line channel.
6. Save the message to run or schedule broadcasts, click *Delete step*  to delete this step from the fallback chain or *Cancel*  to cancel the changes in the message settings.

7.4.5 Email message settings

The Email message settings are illustrated in the figure below.



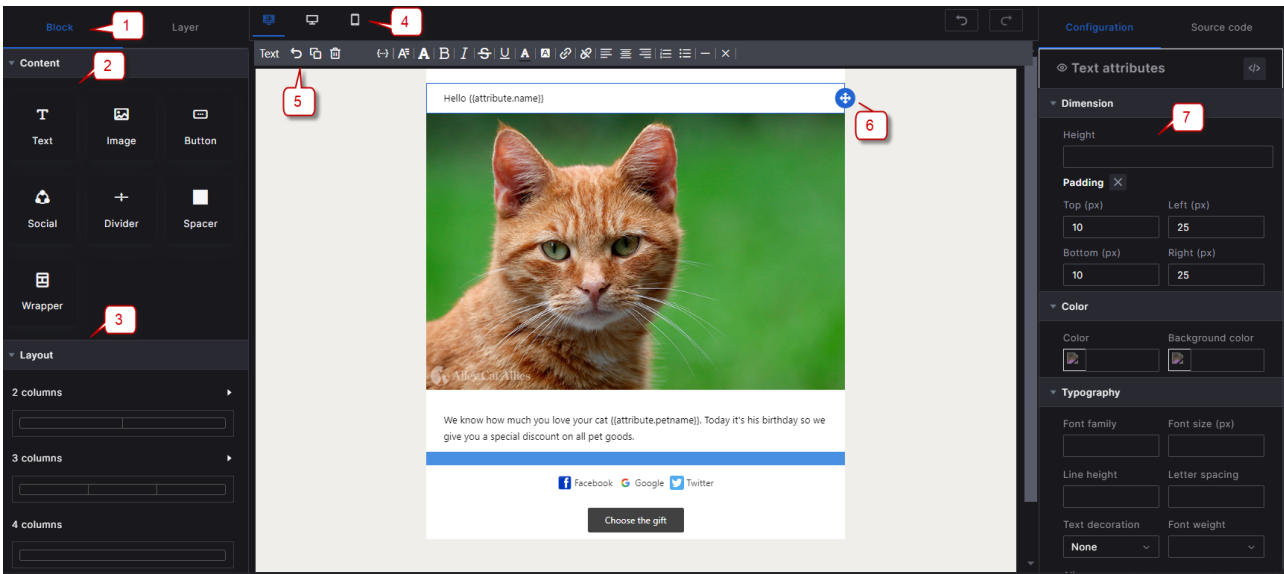
Email settings

1. *Sender*: select the Sender ID on behalf of which the message will be sent. The parameter is mandatory for the broadcast you are going to run or schedule. It is optional for templates.
2. *Template*: select an existing template or create a new template. Name the message and save it as a template. It will be available for use in further broadcasts. Click  to save the template or  to clear the edit box.
3. *Wait for*: choose the criterion for the message success. Possible values are:
 - a. *Delivery*: the message is considered successful if it has been delivered to the recipient's device.
 - b. *Display*: the message is considered successful if it has been displayed on the end-user device.
 - c. *Submit*: the message is considered successful if it has been submitted.
4. *Waiting time*: specify the waiting time. If it expires before the message sending is considered successful (based on (3) in the figure above), the System will attempt sending it through the next-in-line channel.
5. Enter the message subject and subtitle.

6. Click *Open constructor* to personalize the message in the message constructor (see [Email message constructor](#) ⁷⁴).
7. Click *Delete step* to delete the email message as a channel to deliver the message.
8. Click *Save* to save the message.

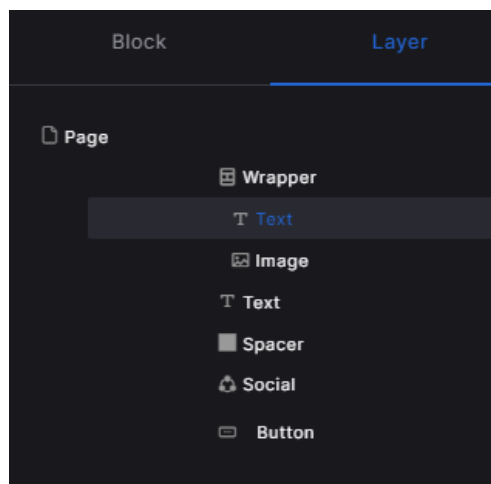
7.4.5.1 Email message constructor

The email message constructor allows configuring the message content and layout.








Email message constructor


1. Select *Block* to configure the email message elements, or *Layers* to view the list of elements and switch between them as shown below.



Layers

2. *Content*: drag&drop an element to add it to the message. The following elements are available:
 - a. *Text*;
 - b. *Image*;
 - c. *Button*: a button with text and link;

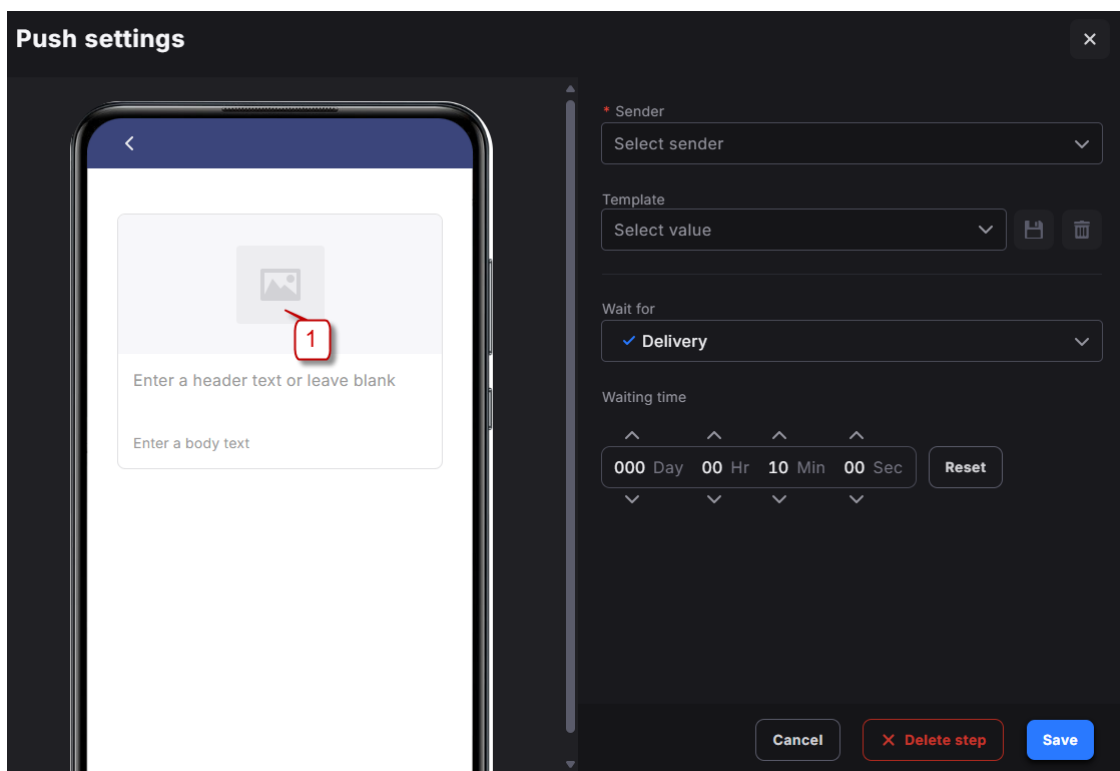
- d. *Social*: links to social media;
 - e. *Divider*: a line that separates the message blocks;
 - f. *Spacer*: a rectangular shape that separates the message blocks;
 - g. *Wrapper*: a marked out section in the message that can contain any of the above elements.
3. *Layout*: choose the number of columns to organize the message into.
 4. See how the message is displayed on different screens. Click  for a regular screen,  for a wide screen and  for a smartphone screen.
 5. Use the toolbar to edit the formatting of text elements. Click  to personalize the message with data from the user profile in the [Contacts](#) database.
 6. Drag&drop the  control to move the message element.
 7. Configure the properties of the message element as appropriate.

Click  in the top right corner to close the constructor and return to the broadcast.


7.4.6 Push message settings

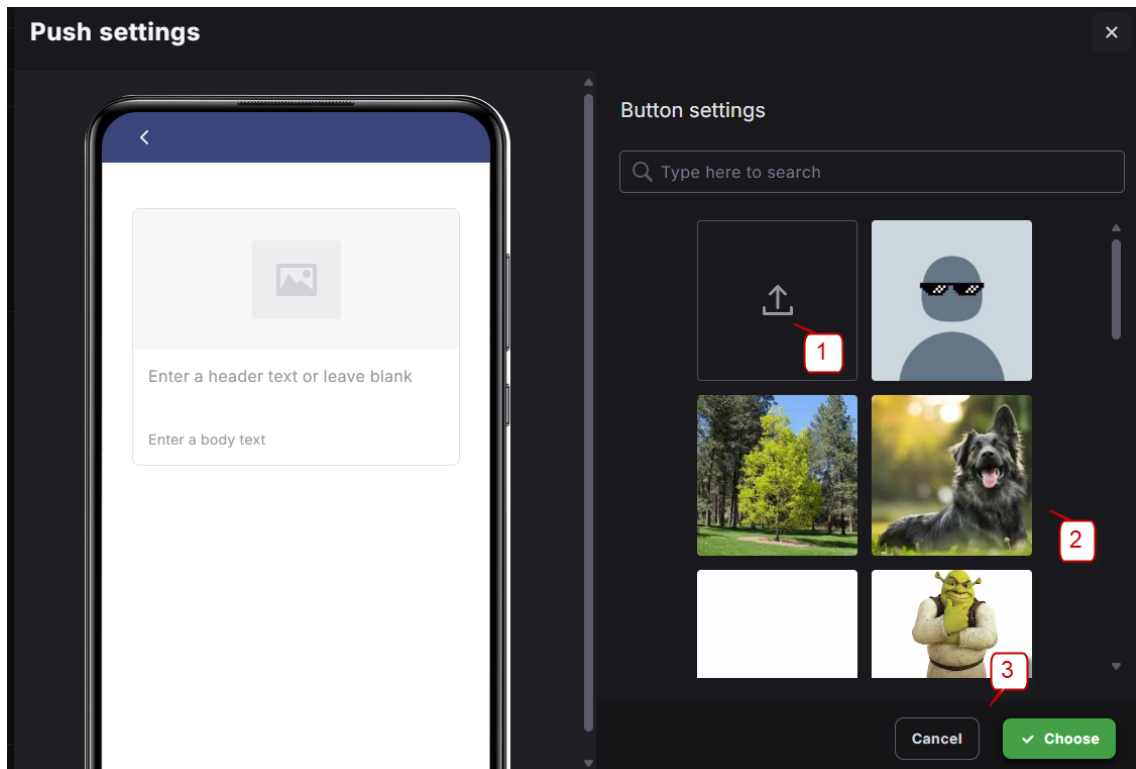
The *Push* channel serves to send standard push notifications to the contacts's device. Push notifications are pop-up notifications on the phone informing contacts about services, promotions, news and updates.

The Push message settings are illustrated in the figure below.






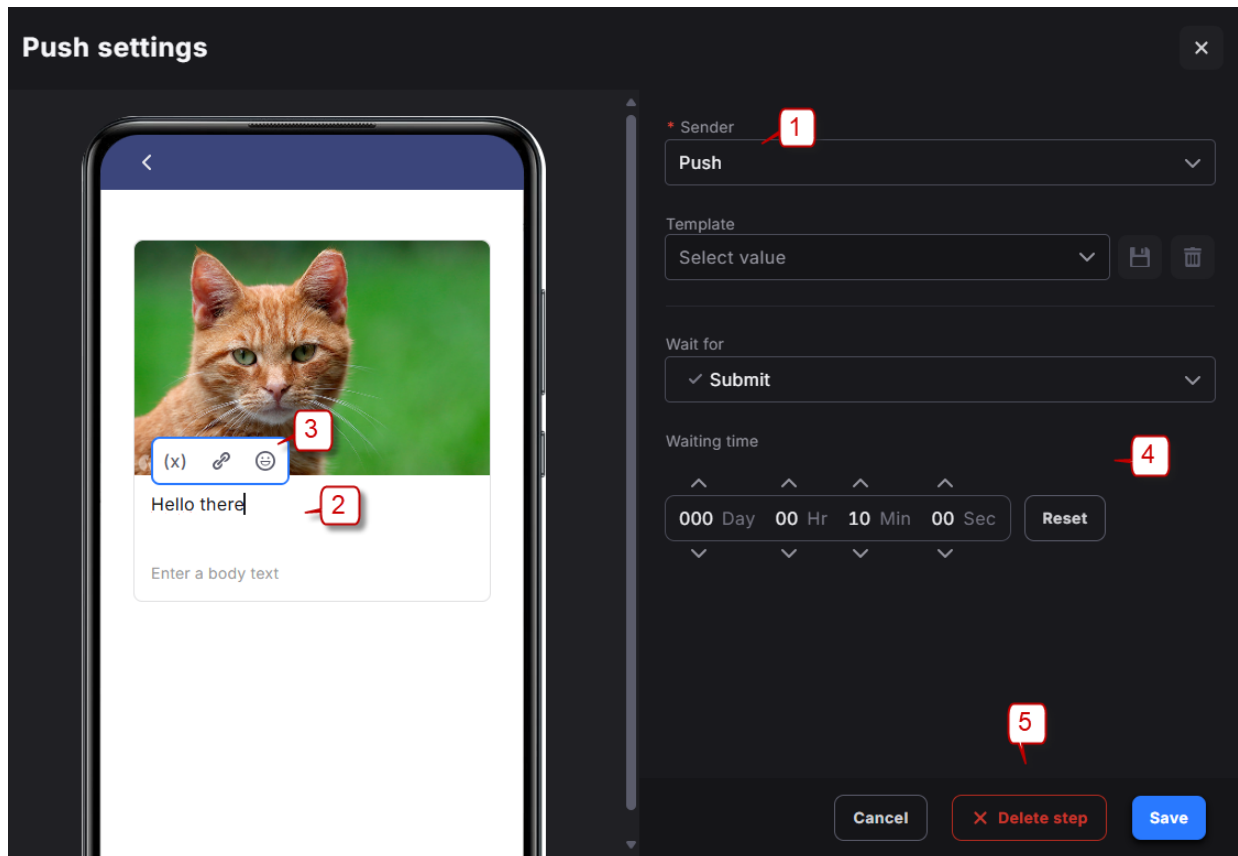
Push settings (1)

1. Click  to upload a picture from your device or to add a picture from the [Media content database](#). Proceed as follows.



Push settings (2)

1. Click  to upload a file from your device. It will be saved for the message and in the [Media content database](#) ¹⁴²¹ as well. OR
2. Select a picture from the [Media content database](#) ¹⁴²¹.
3. Click *Choose*  to choose the file or *Cancel*  to discard the changes.



Push settings (3)

1. Select the Sender.
2. Type the header and message text.

NOTE: When creating Push messages configure at least one of the blocks (picture, header or message body).

3. Personalize the message with data from the user profile in the [Contacts](#) database.
 4. Configure the channel-independent message parameters.
-

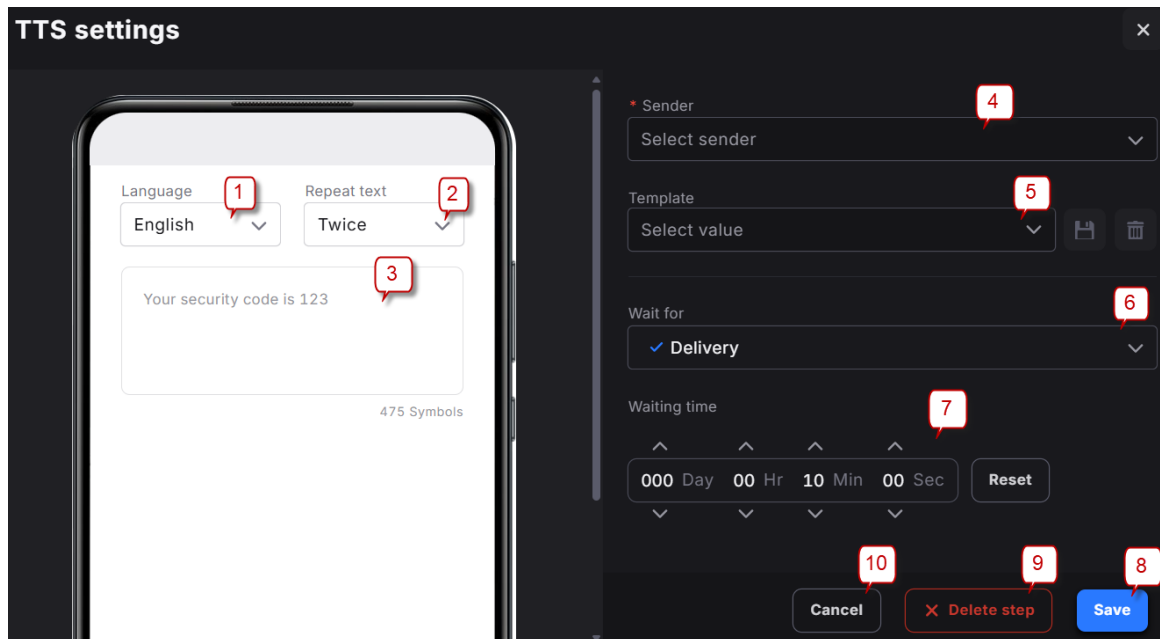
NOTE: *Delivered* status is not available for the Push channel, that is why the *Wait for* parameter should be set to *Submit*.

5. Save the message to run or schedule broadcasts. Click *Delete step* to delete this step from the fallback chain or click *Cancel* to cancel the changes in the message settings.

7.4.7 TTS message settings

The *TTS* (Text-To-Speech) channel serves to convert text messages into a voice call.



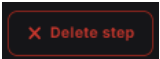
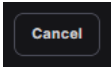
The *TTS* message settings are illustrated in the figure below.



TTS message settings

1. Select the text language (English or Spanish).

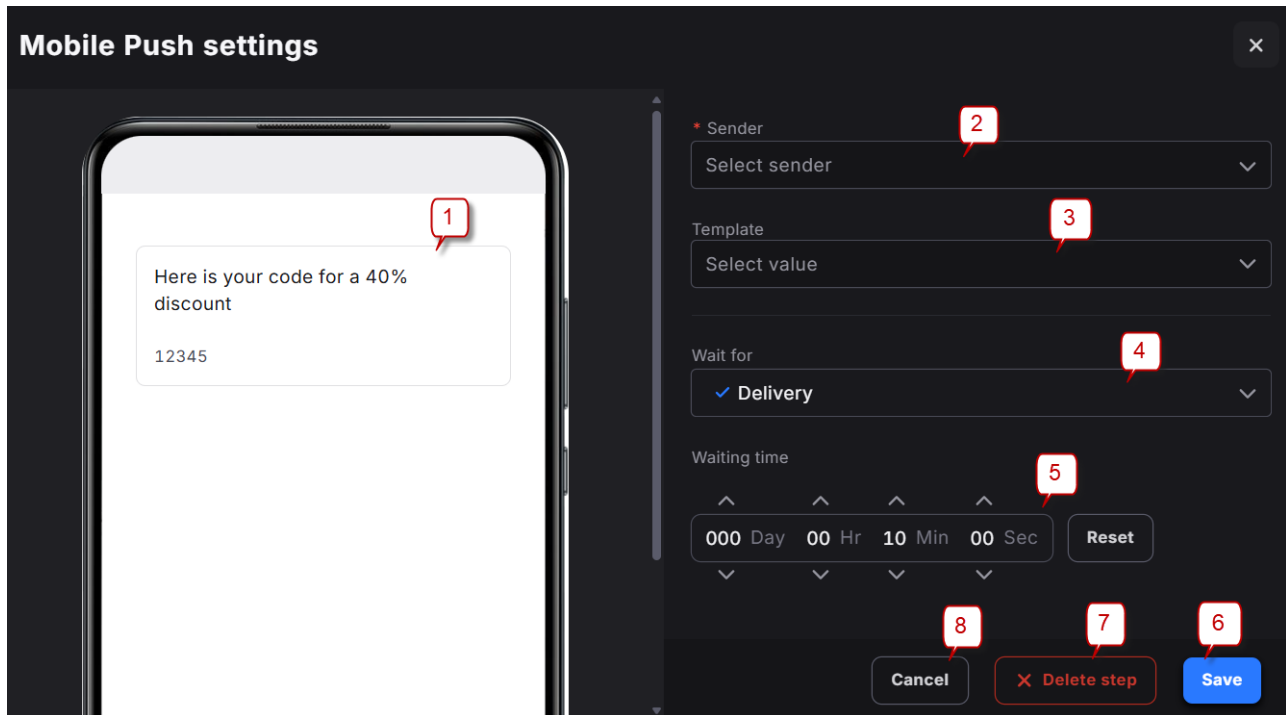
NOTE: Use the same language specified in the control to write the message text.

2. Select how many times the text will be repeated to the client (Once, Twice or Three times).
3. Type the message text.
4. Choose a Sender. The parameter is mandatory for the broadcast you are going to run or schedule. It is optional for templates.
5. Select an existing template or create a new template. Name the message and save it as a template. It will be available for use in further broadcasts. Click  to save the template or  to clear the edit box.
6. Choose the criterion for the message success. Possible values are:
 - a. *Delivery*: the message is considered successful if it has been delivered to the recipient's device (the "delivered" DLR report has been received for it).
 - b. *Submit*: the message is considered successful if it has been submitted (a successful submit_sm_response has been received from the vendor).
 - c. *Display*: the message is considered successful if it was opened on the recipient device (the "displayed"/"display success" DLR report has been received for it).
7. Specify the waiting time. If it expires before the message sending is considered successful (based on (6) in the figure above), the System will attempt sending it through the next-in-line channel.
8. Save the message to run or schedule the broadcast.
9. Click *Delete step*  to delete this step from the fallback chain.
10. Click *Cancel*  to cancel the changes in the message settings.

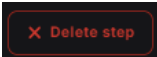
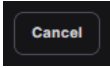
7.4.8 Mobile Push message settings

The *Mobile Push* channel serves to send messages to a third-party mobile app and get the delivery status of the sent message.

The Mobile Push message settings are illustrated in the figure below.



Mobile Push message settings

1. Type the header and body text. Both header and body shall not be left empty.
2. Choose a Sender ID.
3. Select template if appropriate.
4. Choose the criterion for the message success. Possible values are:
 - a. *Delivery*: the message is considered successful if it has been delivered to the recipient's device (the "delivered" DLR report has been received for it).
 - b. *Submit*: the message is considered successful if it has been submitted (a successful submit_sm_response has been received from the vendor).
 - c. *Display*: the message is considered successful if it was opened on the recipient device (the "displayed"/"display success" DLR report has been received for it).
5. Specify the waiting time. If it expires before the message sending is considered successful (based on (6) in the figure above), the System will attempt sending it through the next-in-line channel.
6. Save the message to run or schedule broadcasts.
7. Click *Delete step*  to delete this step from the fallback chain.
8. Click *Cancel*  to cancel the changes in the message settings.

8 Contacts

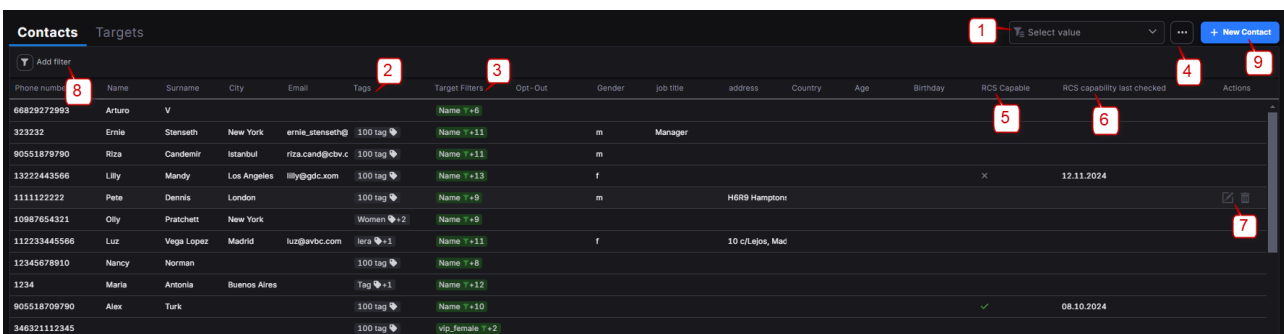
The *Contacts* section serves to store and manage contact details of recipients (also referred to as contacts or end-users). It contains three sub-sections (pages): [Contacts](#)^[80], [Import contacts](#)^[94] and [Opt-out words](#)^[99].

8.1 Contacts page

The *Contacts* page serves to manage contacts: add, edit and import contacts, assign attributes to them and create target selections of contacts (contact lists) that can be used in broadcasts. The page consists of two tabs: *Contacts* and *Targets*.

8.1.1 Contacts

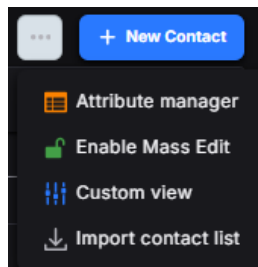
The figure below illustrates the *Contacts* tab and its capabilities.



Phone number	Name	Surname	City	Email	Tags	Target Filters	Opt-Out	Gender	Job title	address	Country	Age	Birthday	RCS Capable	RCS capability last checked	Actions
6689272993	Arturo	V				Name ?+6										
323232	Ernie	Stenseth	New York	ernie_stenseth@100 tag		Name ?+11		m	Manager							
90551879790	Riza	Candemir	Istanbul	riza.cand@cbvc 100 tag		Name ?+11		m								
1322443566	Liby	Mandy	Los Angeles	liby@gdc.com 100 tag		Name ?+13		f					x	12.11.2024		
111112222	Pete	Dennis	London	100 tag		Name ?+9		m		HBR9 Hampton						
10867654321	Olly	Pratchett	New York	Women ?+2		Name ?+9										
112233445566	Luz	Vega Lopez	Madrid	luz@avbc.com 1era ?+2		Name ?+11		f		10 c/Lajos, Mac						
12345678910	Nancy	Norman		100 tag		Name ?+8										
1234	Maria	Antonia	Buenos Aires	Tag ?+1		Name ?+12										
905518709790	Alex	Turk		100 tag		Name ?+10							✓	08.10.2024		
346321112345				100 tag		vip_female ?+2										




Contacts

- Panel that serves to manage targets - selections of contacts that can be used in broadcasts.
- Tags assigned to a contact (during contact import or contact editing).
- A list of target filters assigned to a contact (click on the filter to unfold the list).
- Extra contact management options (see figure below):
 - *Attribute manager*: serves to add attributes to contacts and edit them. See [Attribute Manager](#)^[86] for more detail.
 - *Enable Mass Edit*: select contacts for mass editing.
 - *Custom view*: select columns to display.
 - *Import contact list*: the button that leads to the [Import contacts](#)^[94] page.



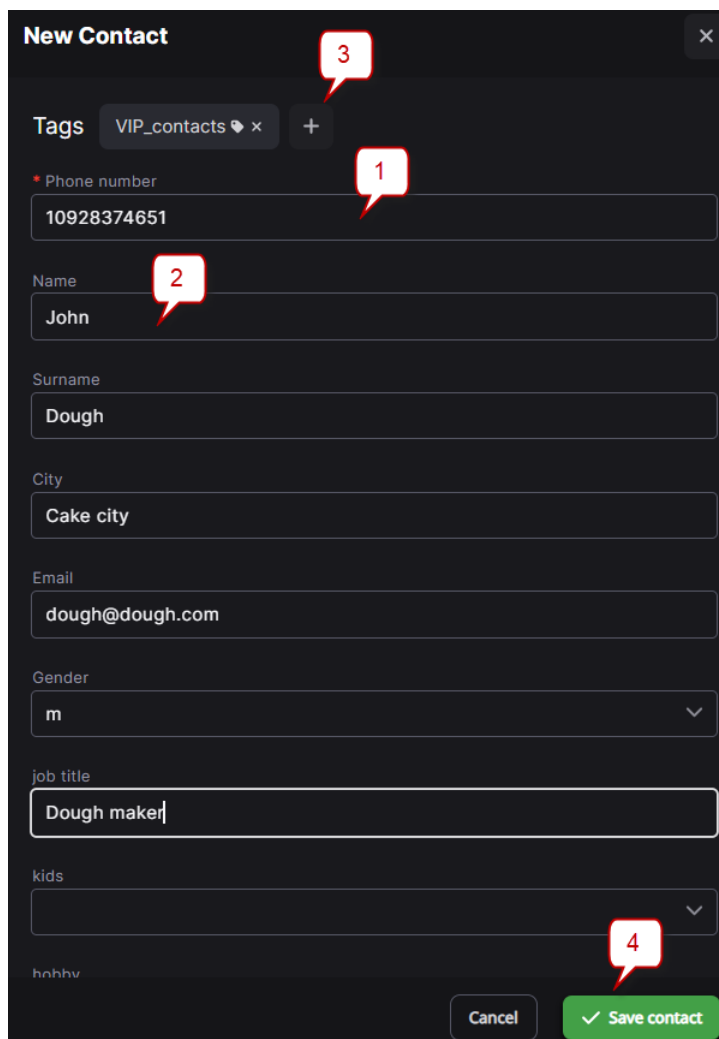
Extra options

- RCS capable*: the column that reflects the RCS capability of the contact.

6. *RCS capability last checked*: the column that shows the last date when the RCS capability of the contact was checked.
7. *Actions*: Click  to edit or  to delete a contact.
8. Click to expand the filtering panel with the list of all existing filters.
9. *New contact*: the button that serves to [add a new contact](#) .

8.1.1.1 Adding new contacts

To add a new contact, click .



New Contact [Close]

Tags VIP_contacts x +

* Phone number
10928374651

Name
John

Surname
Dough

City
Cake city

Email
dough@dough.com

Gender
m



job title
Dough maker

kids

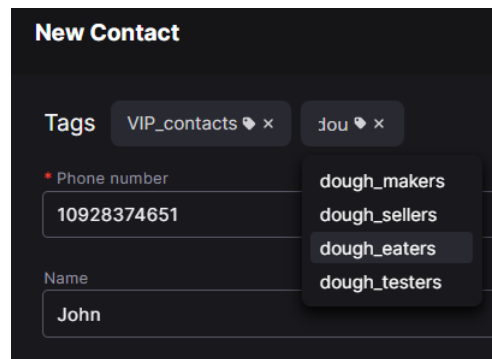
hhhv

Cancel Save contact


Adding a new contact

1. Enter the phone number. It is the only required field in the form.
2. Complete other fields as appropriate.
3. Assign tags to the contact (for details on what is a tag see the **NOTE** below):
 - a. Click  to open the tag selection form .
 - b. Click on the form to unfold the list of tags. Select a tag or start entering the tag name to filter them by name as shown in the figure below.

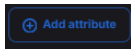
- c. Click  next to the tag name to remove association of the tag with the contact.




Selecting a tag

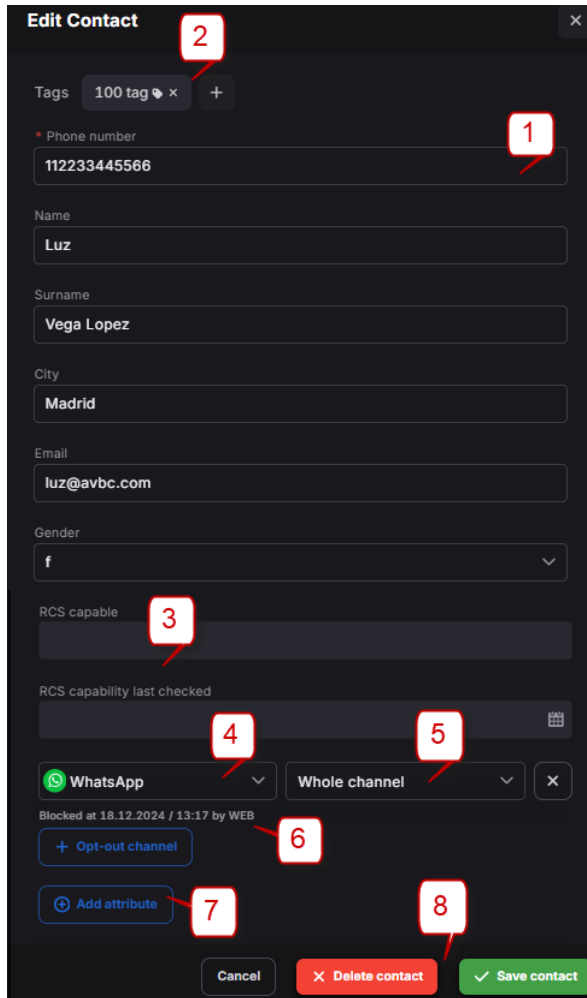
- 4. Click *Save contact* .

NOTE: A tag is a mark assigned to contacts that have a common attribute - for example, contacts that made a purchase in the past three days. Unlike [Targets](#)^[90] that provide a dynamic selection of contacts and whose output depends on the actual state of the contact database (and may change when the database is modified), tags are linked to specific contacts, and the number of contacts having a tag will not change unless the user specifically assigns the tag to more contacts (or removes it from them).

The bottom of the *Add contact* form also contains the *Add attribute* button  that serves to add new fields to the form. If the contact has any extra data that must be added to the Contact database, new attributes can be created right from this section. See [Attribute manager](#)^[86] for details.

8.1.1.2 Editing contacts

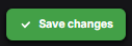

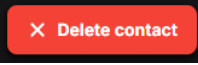
To edit a contact, click on it or on the  icon next to it.



Edit contact


In the *Edit contact* form that appears, proceed as follows:

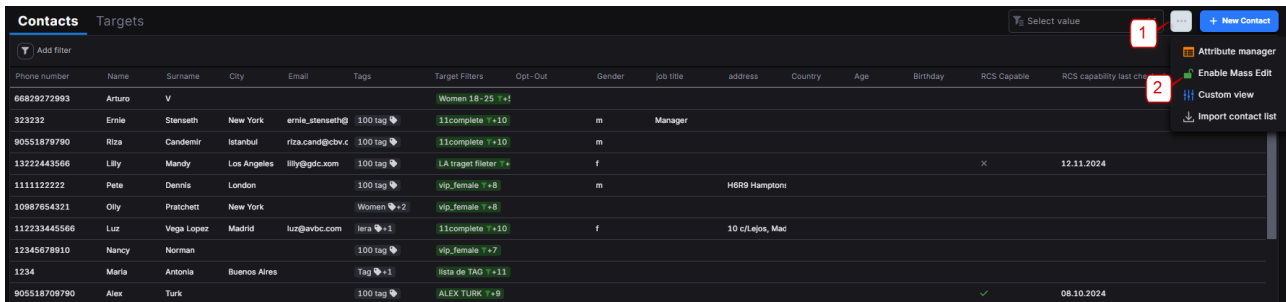
1. Edit the contact fields as appropriate.
2. Add or remove the contacts' tags.
3. The contacts' RCS capability and the date of the last RCS capability check are displayed in the form.
4. Edit the contact's opt-out channel (that is, a channel from which the contact will receive no messages).
5. Select the channel's specific Sender ID from which the contact will receive no messages.
6. Opt-out date, time and user are displayed below the *Opt-out channel* field.
7. Add or edit attributes.

8. Click *Save changes*  to save the changes or *Cancel*  to discard the settings. Click *Delete contact*  to remove the contact.

The System also allows editing multiple records at one go. It is convenient when there is a need to edit some attributes of a target group (for example, a tag) or remove an entire group.

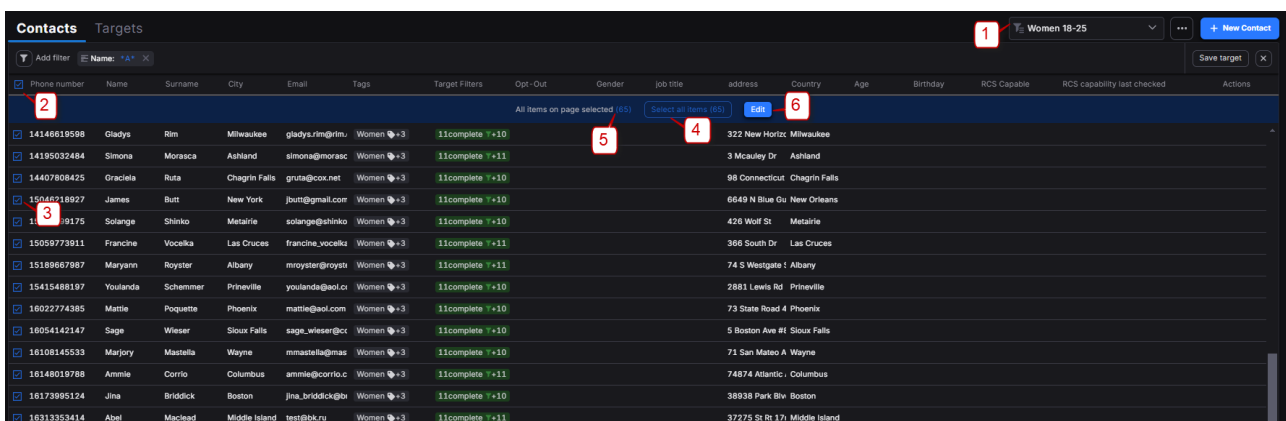
NOTE: Mass removal of all contacts is not allowed.

Click  in the top right corner ((1) in the figure below) and select *Enable mass edit* (2) as illustrated in the figure below.




Enable mass edit

The following operations are possible (see below).



Selecting records for mass editing

1. Select a target group for mass editing.
2. Select all records in the current page.
3. Select or deselect a specific record.
4. Click to select all records (the counter shows the total number of selected records).
5. View the number of records selected on the current page.
6. Click *Edit*  to mass edit the selected records.

Contacts Targets

Add filter Name: [x] [x]

Phone number	Name	Surname	City	Email	Tags	Target Filters	Doi/Stat	Gender	job title	address	Country	Age
14146619598	Gladys	Rim	Milwaukee	gladys.rim@rim	Women	+3	11complete	+10		322 New Horor, Milwaukee		
14195032484	Simona	Morasca	Ashland	simona@morasc	Women	+3	11complete	+11		3 McAuley Dr Ashland		
14407808425	Graciela	Ruta	Chagrin Falls	gruta@cox.net	Women	+3	11complete	+10		88 Connecticut Chagrin Falls		
15040218927	James	Butt	New York	jbut@gnail.com	Women	+3	11complete	+10		6648 N Blue Du New Orleans		
15049799175	Solange	Shinko	Metairie	solange@shinko	Women	+3	11complete	+10		426 Wolf St Metairie		
15059773911	Francine	Vocelka	Las Cruces	francine_vocelka	Women	+3	11complete	+11		366 South Dr Las Cruces		
15189867987	Maryann	Royster	Albany	mroyster@roya	Women	+3	11complete	+11		74 S Westgate Albany		
15415488197	Youtanda	Schemmer	Prineville	youtanda@aol.c	Women	+3	11complete	+10		2881 Lewis Rd Prineville		
18022774386	Mattie	Poquette	Phoenix	mattie@aol.com	Women	+3	11complete	+10		73 State Road 4 Phoenix		
18054142147	Sage	Wieser	Sioux Falls	sage_wieser@cc	Women	+3	11complete	+10		5 Boston Ave #1 Sioux Falls		
18108145533	Marjory	Mastella	Wayne	mmastella@mas	Women	+3	11complete	+10		71 San Mateo A Wayne		
18148019788	Annme	Corrio	Columbus	annme@corrio.c	Women	+3	11complete	+11		74874 Atlantic Columbus		
18173995124	Jina	Bridgick	Boston	jina_bridgick@bu	Women	+3	11complete	+10		38938 Park Blv Boston		
18313353414	Abel	Maclead	Middle Island	test@bk.ru	Women	+3	11complete	+11		37275 St Rt 17, Middle Island		
17156626764	Allene	Iturbide	Stevens Point	test@bk.ru	Women	+3	11complete	+11		1 Central Ave Stevens Point		
17326583154	Allaha	Shusarki	Middlesex	test@bk.ru	Women	+3	11complete	+11		3273 State St Middlesex		
17329247882	Albina	Glick	Dunellen	test@bk.ru	Women	+3	11complete	+11		4 Ralph Ct Dunellen		
17854637829	Kati	Rulapaugh	Abilene	test@bk.ru	Women	+3	11complete	+11		6880 Dorsett Rv Abilene		
18039255213	Sabra	Uyetaka	Columbia	test@bk.ru	Women	+3	11complete	+10		98839 Hawthor Columbia		
18058326163	Rozella	Ostrosky	Camarillo	test@bk.ru	Women	+3	11complete	+10		17 Morana Blvd Camarillo		
18586368749	Art	Venere	Bridgeport	test@bk.ru	Women	+3	11complete	+11		8 W Cerritos Av Bridgeport		
18072314722	Roxane	Campain	Fairbanks	test@bk.ru	Women	+3	11complete	+10		1048 Main St Fairbanks		

Edit selected items

Tags dog_owners [x] +

Phone number

Name

Surname

City

Email

Gender

job title

Kids


hobby

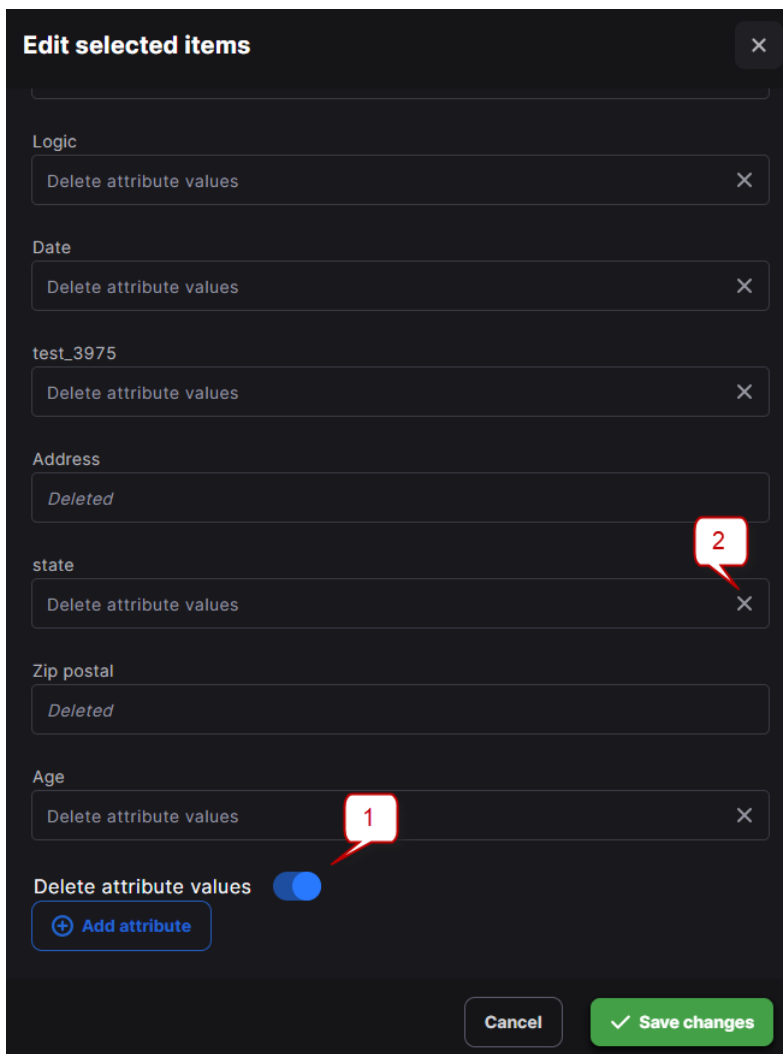
address

Country

Cancel Delete contacts Save contacts

Editing selected records

In the form that appears edit the attributes as appropriate (for example, tags or channels). Enable the switch *Delete attribute values* to clear the parameter values for selected contacts as shown in the figure below (1). Click  next to an attribute to remove its value for the selected records (2).



Delete attribute values

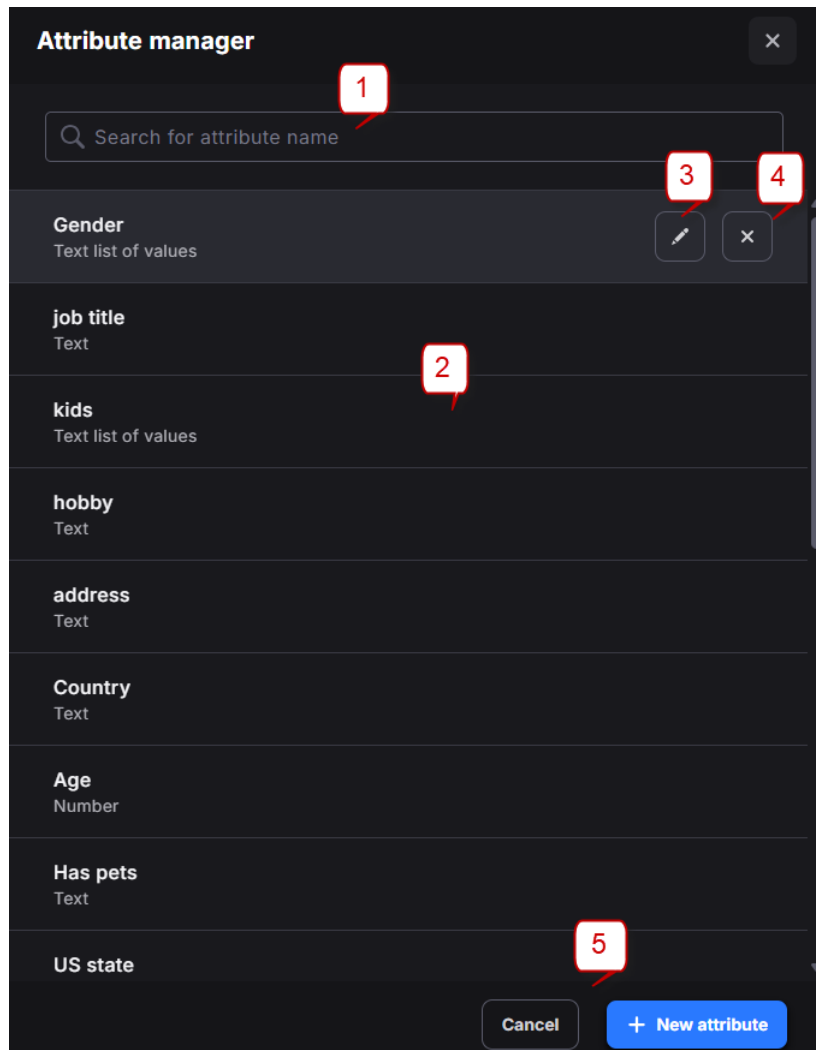
Click **Save contacts** to save the changes or **Cancel** to discard them. Click **Delete contacts** to remove the records.

NOTE: When all available contacts are selected, the **Delete contacts** button is not available. This is done to prevent erroneous removal of the entire contacts database.

To return to the regular contacts view and edit mode, click **...** in the top right corner of the page and select **Disable mass edit**.



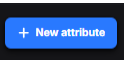

8.1.1.3 Attribute manager

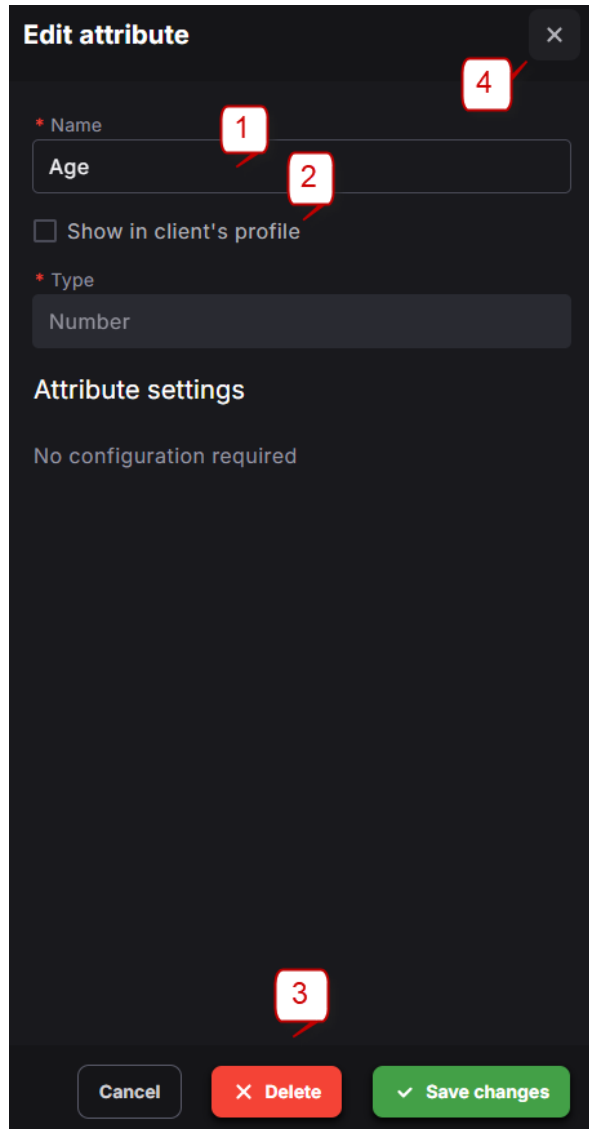
The *Attribute manager* serves to add, edit and remove contact fields (attributes). To open it, click **Attribute manager** on the *Contacts* page.



Attribute manager

The following operations are available:

1. Start typing the attribute name to quickly find it.
2. View the list of available attributes.
3. Click  to edit the attribute and proceed with the *Edit attribute* form as described below.
4. Click  to delete the attribute.
5. Click *New attribute*  to create a new attribute or *Cancel*  to discard the changes.

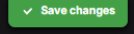





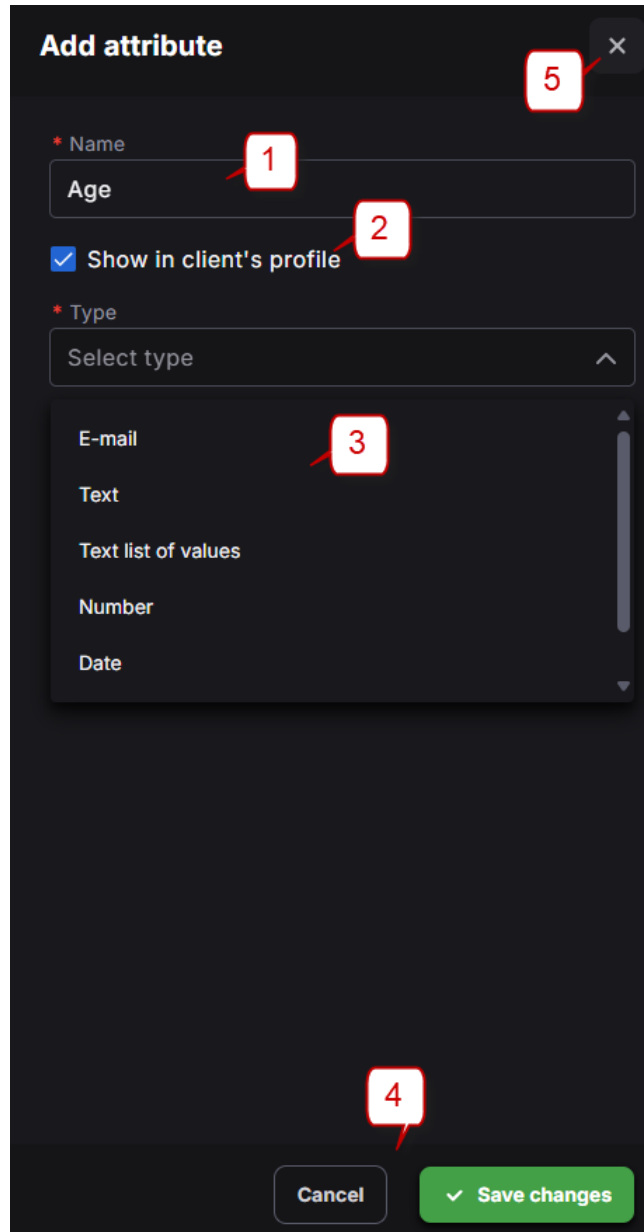
Edit attribute

To edit an attribute:

1. Edit the attribute name if necessary.
2. Check *Show in client's profile* the attributes to be displayed in the appropriate conversation in the Conversations section.

NOTE: The *Name* and *Opt-outs* contact attributes are displayed by default, so there is no need to check the *Show in client's profile* checkbox for these attributes. If these controls are empty, they are hidden in Conversations.

3. Click *Save changes*  to save the changes or *Cancel*  to discard the settings. Click *Delete*  to remove the contact.
4. Click  to close the form.



The screenshot shows a dark-themed dialog box titled "Add attribute" with a close button (X) in the top right corner. The dialog contains the following elements:

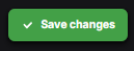

- 1**: A text input field labeled "* Name" containing the text "Age".
- 2**: A checked checkbox labeled "Show in client's profile".
- 3**: A dropdown menu labeled "* Type" with "E-mail" selected. The menu options are "E-mail", "Text", "Text list of values", "Number", and "Date".
- 4**: A "Cancel" button.
- 5**: A "Save changes" button with a green checkmark.

Add attribute

To create an attribute:

1. Supply the attribute name.
2. Select the *Show in client's profile* checkbox to display the attributes in the appropriate conversation in the Conversations section.
3. Select the type. Possible types are:
 - a. *E-mail*;
 - b. *Text*;
 - c. *Text list of values*;
 - d. *Number*;
 - e. *Date*;

f. Logical yes / no.

4. Click *Save changes*  to save the changes or *Cancel*  to discard the settings.

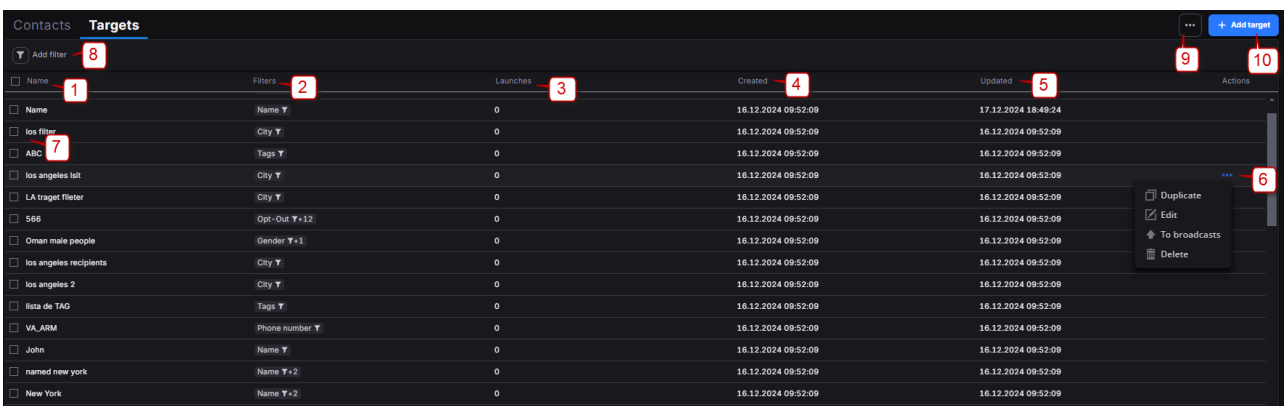
5. Click  to close the form.

NOTE: The only required attribute is *Phone number*. All other attributes can be removed.


8.1.2 Targets

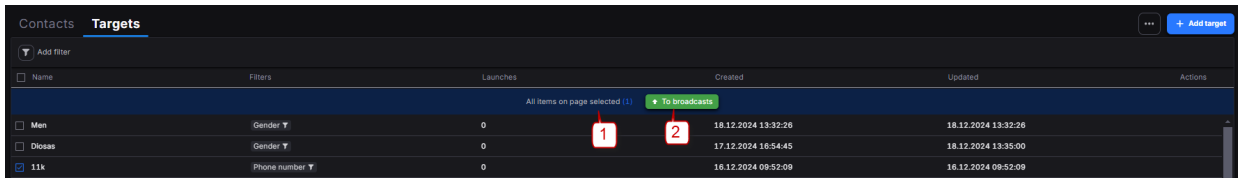
Targets are a set of filtering criteria that serve to select recipients possessing similar properties, for use in broadcasts (for example, women aged 18-25 living in Spain). When creating a broadcast, the user chooses Targets - that is, contacts that are selected with the help of Target filters.

The figure below illustrates the *Targets* tab and its capabilities.



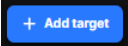
Targets

1. *Name*: the name of a target.
2. *Filters*: filters assigned to a target.
3. *Launches*: the number of the broadcast launches.
4. *Created*: the date when a target was created set as DD:MM:YYYY HH:MM:SS.
5. *Updated*: the date when a target was edited.
6. *Actions*:
 - *Duplicate*: click to duplicate the record.
 - *Edit*: click to edit the record.
 - *To broadcasts*: click to create a new broadcast as detailed in [Broadcasts\Creating a new broadcast](#)^[29].
 - *Delete*: click to delete the record.
7. Click to select a specific record or records. After you select a record the number of selected records (1) and *To broadcasts* button (2) will appear on top of the table as illustrated in the figure below. Click *To broadcasts*  to create a new broadcast as detailed in [Broadcasts\Creating a new broadcast](#)^[29].



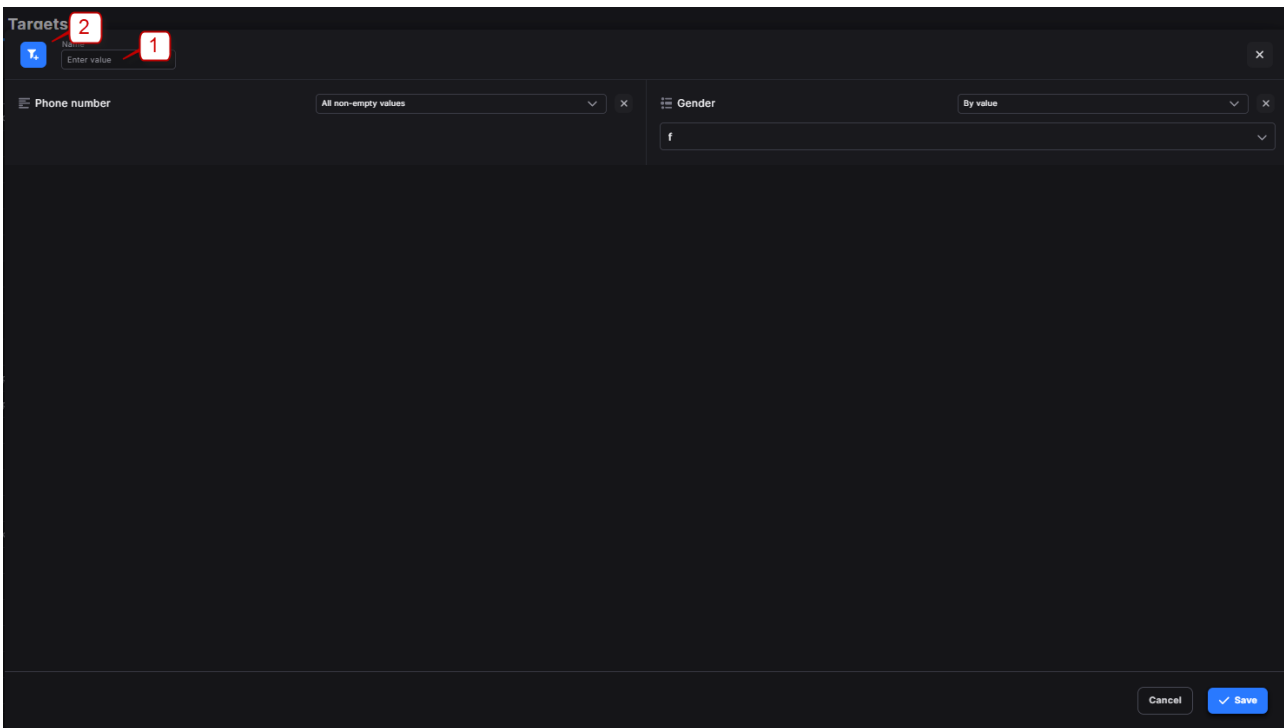
Name	Filters	Launches	Created	Updated	Actions
Men	Gender ♀	0	18.12.2024 13:32:26	18.12.2024 13:32:26	
Diosas	Gender ♀	0	17.12.2024 16:54:45	18.12.2024 13:35:00	
11x	Phone number ♀	0	18.12.2024 09:52:09	18.12.2024 09:52:09	

Selecting targets


8. Click to filter the records in the table.
9. Click to customize the display of columns.
10. Click *Add target*  to add a new target.

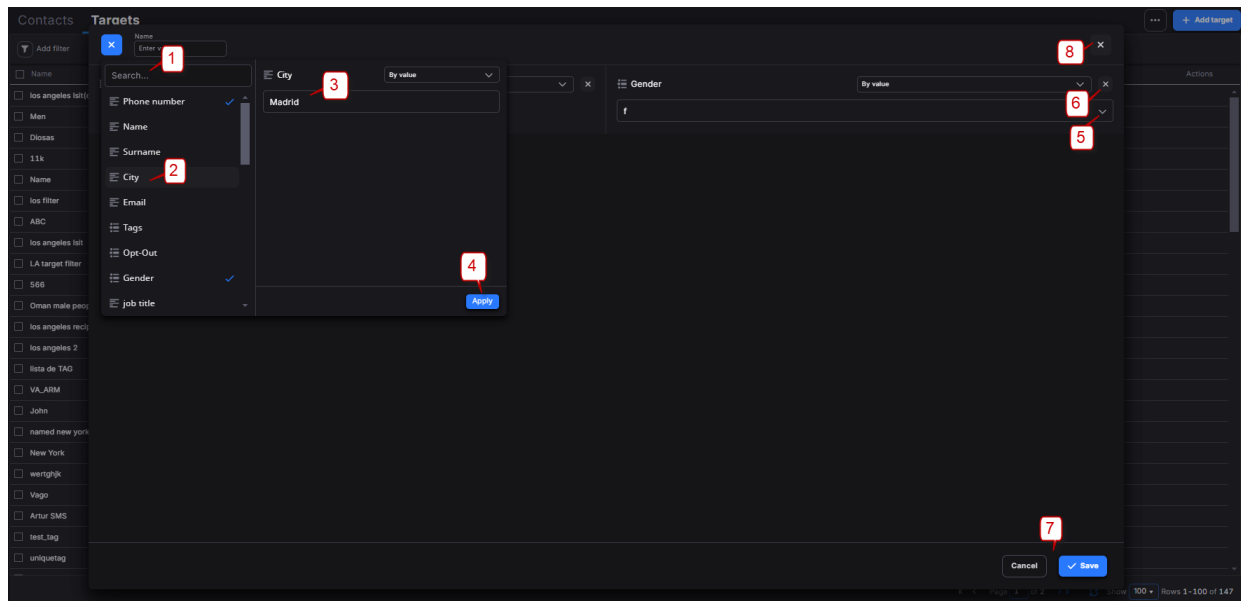
8.1.2.1 Adding new targets

To add a new target, click *Add target* .



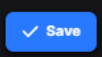




Adding a new target (1)

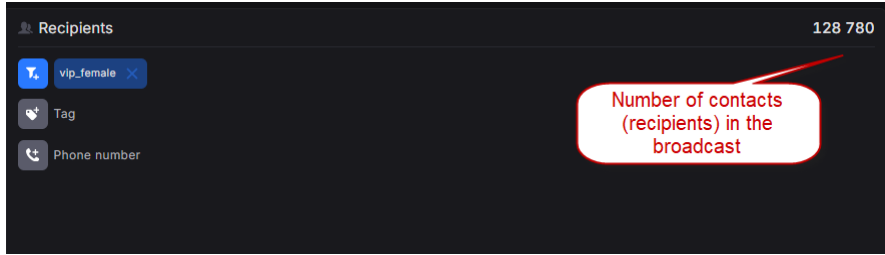
1. Enter the name of the target in the *Name* field.
2. Click  to expand the drop-down menu.



Adding a new target (2)

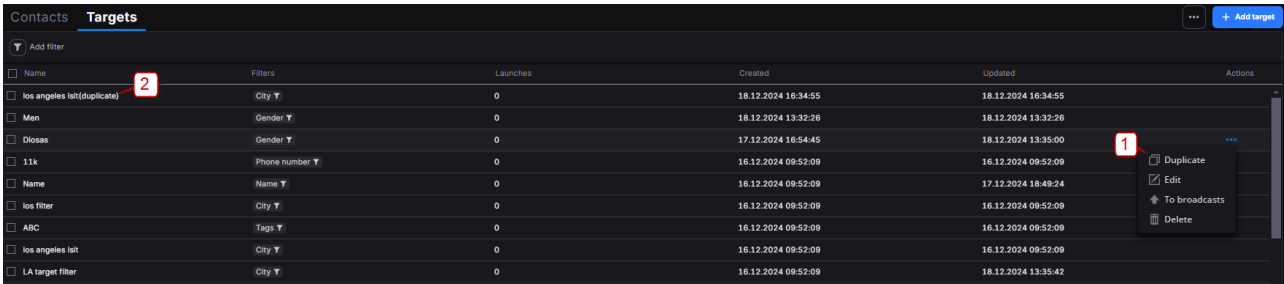
1. Start typing the name of the target filter in the *Search* field.
2. Or click on the target filter to open the filtering panel and select the criteria. Possible values are:
 - *By range*;
 - *By value*;
 - *Empty value*;
 - *All non-empty values*.
3. If *By value* is selected type in the name of the filter.
4. Click *Apply*  to apply the selected filter.
5. Click to expand the drop-down list and edit the filter.
6. Click  to clear filter.
7. Click *Save*  to save the target or *Cancel*  to discard the settings.
8. Click  to close the window.

NOTE: The content of Targets - that is, selection of contacts resulting from applying a filter - may change once the contact database is changed. **Example.** Suppose a user created a target that includes women aged 18-25, and the System selected 100 records that match the filter. Then the user imported some more contacts that also contained 10 women aged 18-25. Thus the number of records matching the filter has increased to 110 records. To avoid confusion, it is recommended to check the number of contacts (recipients) in the Target when creating a [broadcast](#)^[25] as illustrated in the figure below.



Checking the number of contacts during broadcast creation

8.1.2.2 Duplicating targets

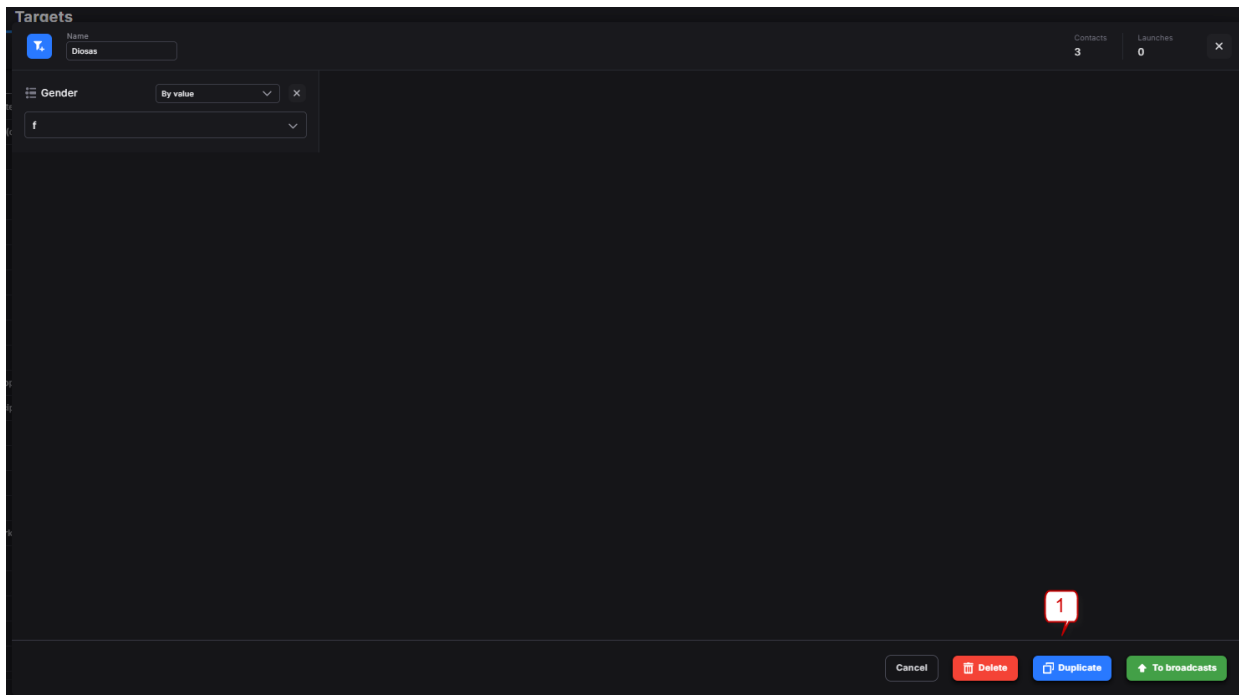


Duplicating a target

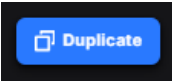
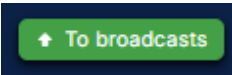
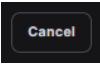
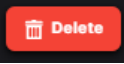
1. Click to duplicate a target.
2. The duplicate will appear in the table.

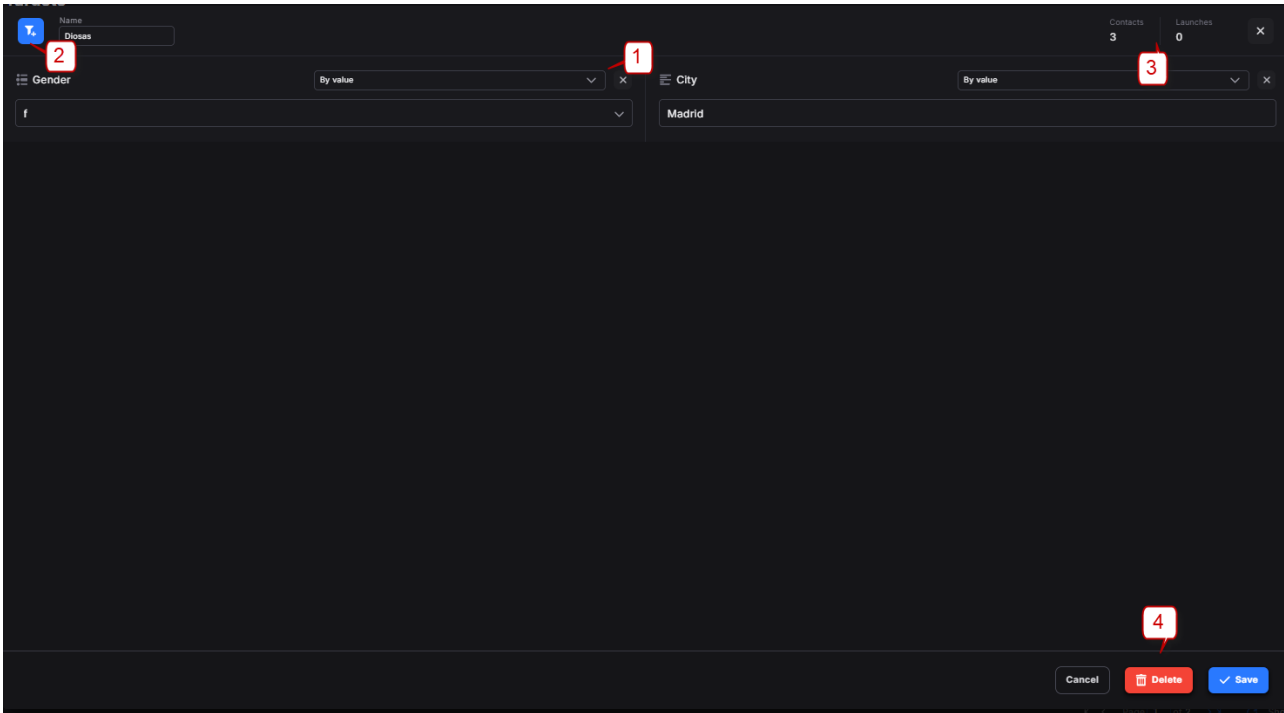
8.1.2.3 Editing targets

Click *Edit*  to open the record.



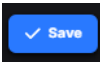

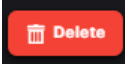
Editing a target (1)

1. Click *Duplicate*  to duplicate the target, *To broadcasts*  to proceed to broadcast settings, *Cancel*  to cancel editing or *Delete*  to remove the target.



Editing a target (2)

Start editing the target as appropriate:

1. Edit or remove the existing filters.
2. Add new filters.
3. Check the number of contacts in the target and the number of launches.
4. Click *Save*  to save the changes or *Cancel*  to discard the settings. Click *Delete*  to remove the target.

8.2 Import contacts

The *Import contacts* section allows importing contacts to the System.

Step 1. Upload the file



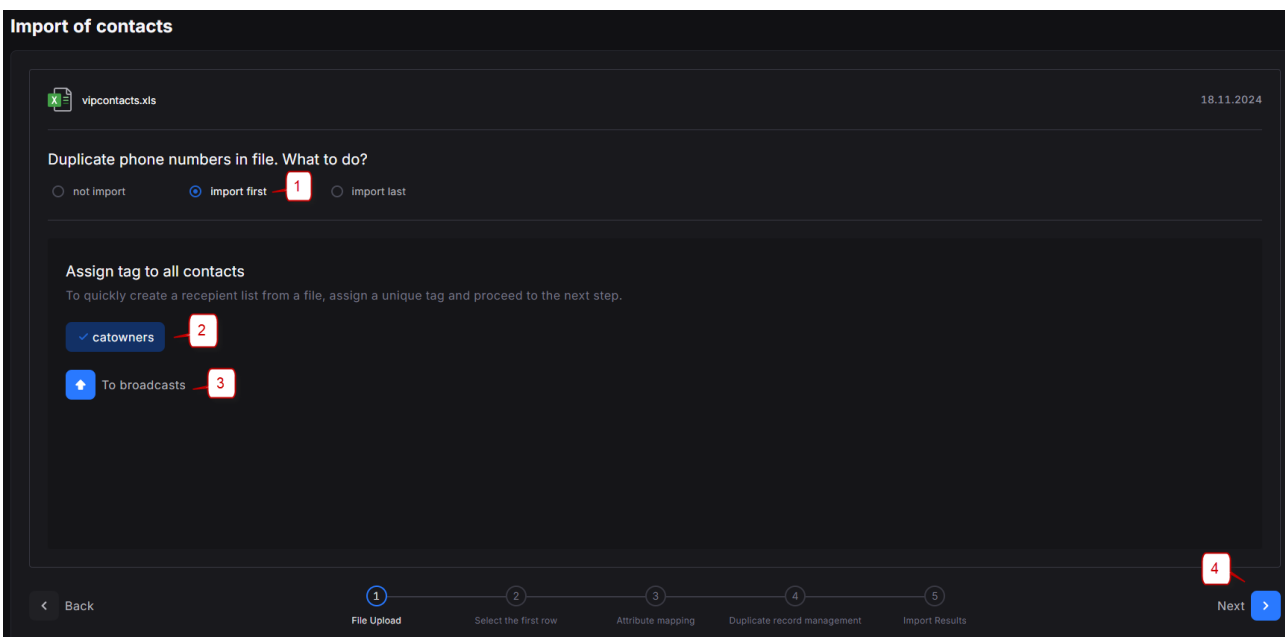
Step 1. Upload the file

1. Click **Select file** to choose the file for import or use drag&drop (.csv, .xls and .xlsx files are supported).
2. View the import history.

NOTE: The files are for viewing only, downloading is not available (five most recent files are shown).

3. View the import steps.

Step 1 (continued). Handle duplicates and assign tags

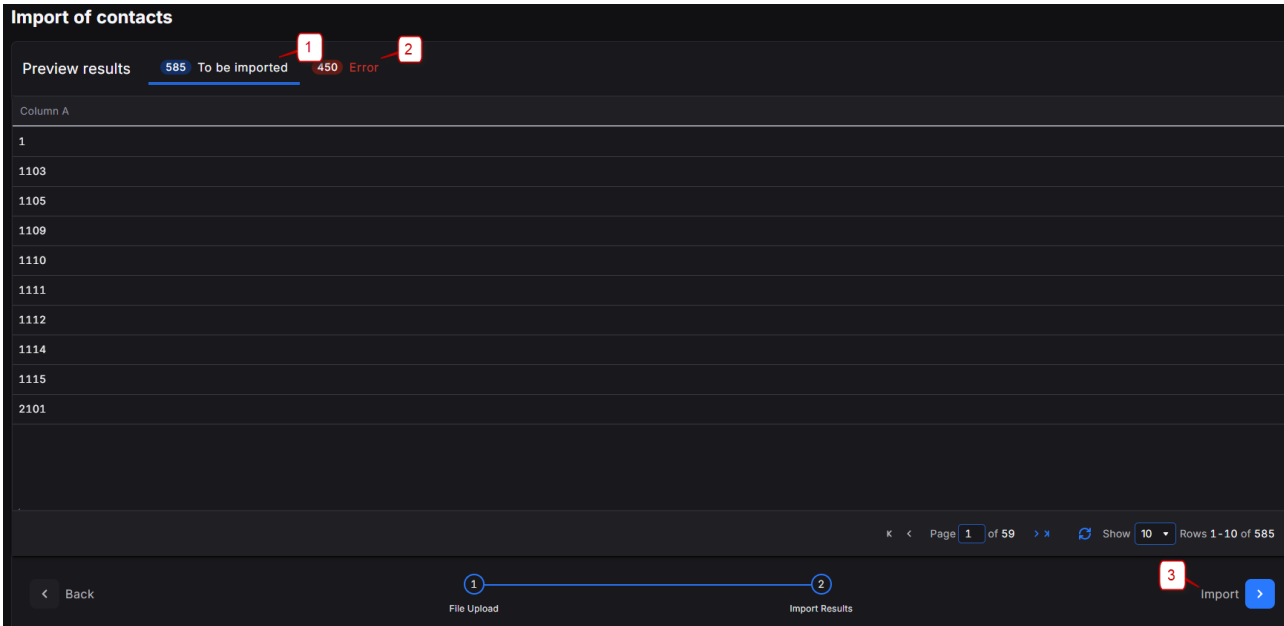


Step 1 (continued). Handle duplicates and assign tags

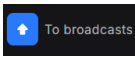
1. Tell the System what to do with duplicate records in the uploaded file.

2. Assign a tag to the contacts. Enter a unique tag name in the field. If the name is not unique, the newly imported contacts will be grouped with other contacts that have the same tag.

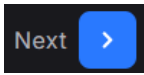
NOTE: A tag is a mark assigned to contacts that have a common attribute - for example, contacts that made a purchase in the past three days. Unlike Target filters (see [Filtering and sorting](#)^[34]) that provide a dynamic selection of contacts and whose output depends on the actual state of the contact database (and may change when the database is modified), tags are linked to specific contacts, and the number of contacts having a tag will not change unless the user specifically assigns the tag to more contacts (or removes it from them).



Quick import

3. Click  for quick import. The System will import the records (telephone numbers only) and open the [Broadcasts](#)^[25] section to create a broadcast for these numbers (see figure below):
 - 1) View records that will be imported.
 - 2) View records that contain errors.
 - 3) Click to import records and go to the [Broadcasts](#)^[25] section.

NOTE: For quick import, the file must contain only the column with phone numbers. Only XSL or CSV files are supported. If the file contains phone numbers that already exist in the database, the System will assign the tag to the respective database records and not import the duplicates.

4. To proceed with regular import, click .

Step 2. Select the first row

Import of contacts

Select the row to start with

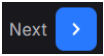
Column A	Column B	Column C	Column D	Column E	Column F
SIRA NO	VD KODU	İLİ	VERGİ DAİRESİ ADI		
1	01201	ADANA	CEYHAN VERGİ DAİRESİ		
	01203	ADANA	KOZAN VERGİ DAİRESİ		
	01205	ADANA	KARATAŞ VERGİ DAİRESİ		
	01251	ADANA	BEŞÖCAK VERGİ DAİRESİ		
	01252	ADANA	YÜREĞİR VERGİ DAİRESİ		
	01253	ADANA	SEYHAN VERGİ DAİRESİ		
	01254	ADANA	ZİYAPAŞA VERGİ DAİRESİ		
	01255	ADANA	ÇUKUROVA VERGİ DAİRESİ		
	02260	ADIYAMAN	ADIYAMAN VERGİ DAİRESİ		

Page 1 of 104 | Show 10 | Rows 1-10 of 1035

1 File Upload | 2 Select the first row | 3 Attribute mapping | 4 Duplicate record management | 5 Import Results

Next >

Step 2. Select the first row

1. Select the first row that contains contacts.
2. Click .

Step 3. Map the file column names and database column names

Import of contacts

Map the column names from the file to those in the database

Select value | Attribute manager

Column A	Column B	Column C	Column D	Column E	Column F	Column G	Column H	Column I	Column J	Column K
name	surname	Select att...	Select att...	Select att...	Select att...	Select att...	Select att...	Select att...	Select att...	Select att...
James	Butt	phoneNumber	New Orleans	Orleans	LA	70116	jbutt@gmail.co	yes		11/20/2018
Josephine	Darakij	city	Brighton	Livingston	MI	48116	josephine_dara	no		10/16/2019
Art	Venere	email	Bridgeport	Gloucester	NJ	08014	art@venere.org	yes		05/18/2018
Lenna	Paprocki	Gender	Anchorage	Anchorage	AK	99501	lpaprocki@hotr	yes		01/02/2015
Donette	Foller	jobtitle	Hamilton	Butler	OH	45011	donette.foller@	yes		03/14/2014
Simona	Morasca	kids	Mcauley Dr	Ashland	OH	44805	simona@moras	no		06/16/2015
Mitsue	Tollner	hobby	7 Eads St	Chicago	IL	60632	mitsue_tollner@	no		10/30/2019
Leota	Dilliard	address	7 W Jackson Blv	San Jose	CA	95111	leota@hotmail.	yes		07/21/2009


Page 1 of 6 | Show 10 | Rows 1-10 of 56

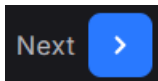
1 File Upload | 2 Select the first row | 3 Attribute mapping | 4 Duplicate data managing | 5 Import Results

Next >

Step 3. Map the file column names and database column names

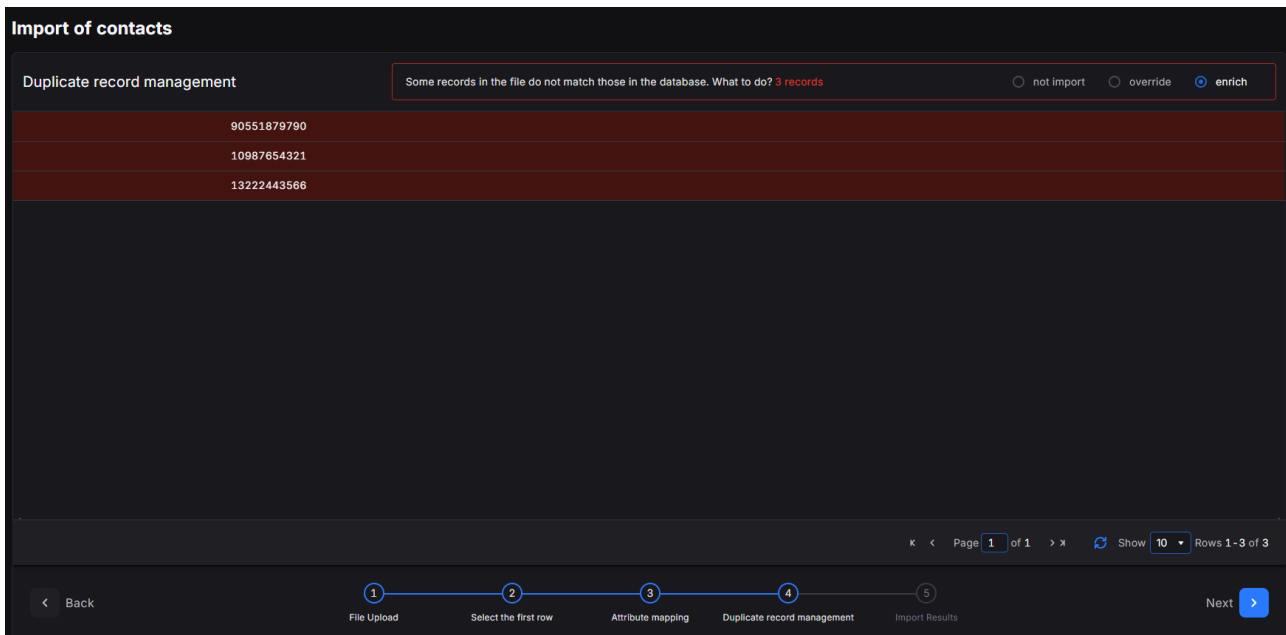
1. Match existing attributes with column names. The only required column is *phoneNumber*.
2. If necessary, go to [Attribute manager](#) and create new attributes. In this case, the import process will be reset and you will need to start from **Step 1**.

3. Select a preset or create a new one. Next time, when importing a file with a similar structure, select the preset and the attributes will be mapped to column names automatically. To create a new preset, type its name in the edit field and click .



4. Click  to proceed.

Step 4. Duplicate record management

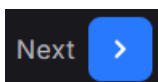


The screenshot shows the 'Import of contacts' interface. At the top, there's a section for 'Duplicate record management' with a message: 'Some records in the file do not match those in the database. What to do? 3 records'. Below this, there are three radio button options: 'not import', 'override', and 'enrich' (which is selected). A table below shows three rows of phone numbers: 90551879790, 10987654321, and 13222443566. At the bottom, there's a progress bar with five steps: 1. File Upload, 2. Select the first row, 3. Attribute mapping, 4. Duplicate record management (current step), and 5. Import Results. A 'Next' button is visible at the bottom right.

Duplicate record management

1. Select how the System should manage duplicate records:
 - not import*: do not import the duplicate record.
 - override*: replace the duplicate record.
 - enrich*: if the imported file has some extra information about the existing contact it will be added to the record.

NOTE: Duplicates are records that have the same phone number.



2. Click  to proceed.

Step 5. Preview results

Import of contacts

Preview results 452 To be imported 590 Error

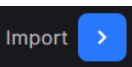
phoneNumber
01201
01203
01205
01251
01252
01253
01254
01255
02260
02261

Page 1 of 46 | Show 10 Rows 1-10 of 452

Back | 1 File Upload | 2 Select the first row | 3 Attribute mapping | 4 Duplicate record management | 5 Import Results | Import

Preview results

All records are available in the preview.

Click  to complete the import. You will be redirected to the [Contacts](#) page.

8.3 Opt-out words



Opt-out words are words that can be used by recipients in MO messages to stop receiving messages from the System. To configure them, go to *Contacts\Opt-out words*.

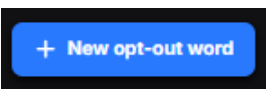
Opt-out words manager

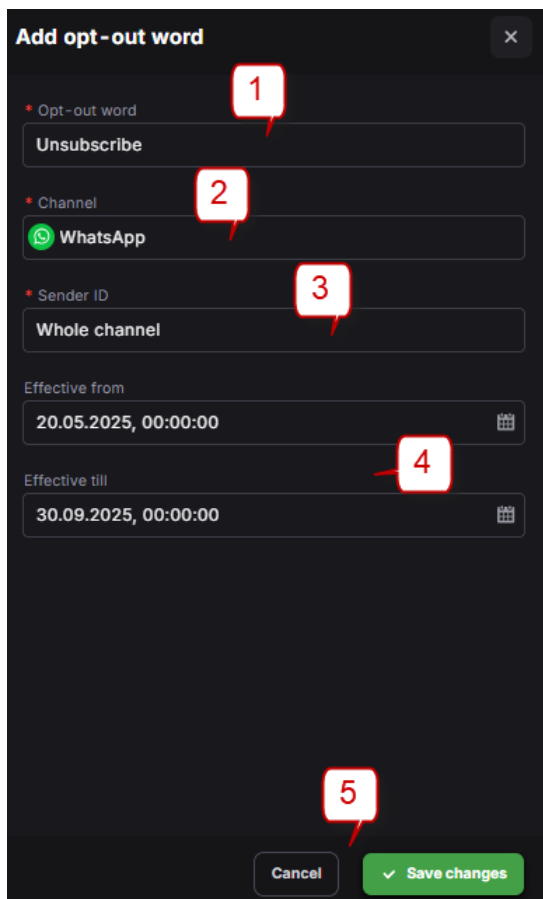
+ New opt-out word

Opt-out word	Channel	Sender ID Name	Effective from	Effective till	Actions
STOP	no		10.07.2024 00:00:00	11.07.2024 00:00:00	1
new_optout	no	DEMO ENV	22.06.2023 00:00:00	23.06.2023 00:00:00	
959556	no	Bottle	12.10.2022 00:00:00	11.10.2022 00:00:00	2
stop2	no		16.10.2022 00:00:00	18.10.2022 00:00:00	
STOP-1	no		15.10.2022 22:00:00	30.10.2022 22:00:00	
stop	no		23.10.2023 00:00:00		
stop	no		28.08.2022 00:00:00	30.09.2022 00:00:00	
no	no		18.09.2022 00:00:00	08.10.2022 00:00:00	
23456	no		12.10.2022 01:48:11	12.10.2022 00:00:00	
Stop	no		04.09.2022 00:00:00	12.09.2022 00:00:00	

Opt-out words manager

1. Click to add a new opt-out word (see below for details).
2. Click  to edit or  to delete a contact.
3. Click to customize the display of columns.

Click *New opt-out word*  to add a new record.



The screenshot shows a dark-themed form titled "Add opt-out word" with a close button (X) in the top right corner. The form contains the following fields and options:

- Opt-out word:** A text input field containing "Unsubscribe", marked with a red callout box labeled "1".
- Channel:** A dropdown menu showing "WhatsApp" with a green WhatsApp icon, marked with a red callout box labeled "2".
- Sender ID:** A dropdown menu showing "Whole channel", marked with a red callout box labeled "3".
- Effective from:** A date and time picker showing "20.05.2025, 00:00:00", marked with a red callout box labeled "4".
- Effective till:** A date and time picker showing "30.09.2025, 00:00:00", marked with a red callout box labeled "4".
- Buttons:** At the bottom, there are two buttons: "Cancel" and "Save changes" (with a green checkmark icon), marked with a red callout box labeled "5".

Add opt-out word

Configure the parameters illustrated in the figure above:

1. *Opt-out word:* enter an opt-out word.
2. *Channel:* select a channel from the drop-down list.
3. *Sender ID:* select a specific sender ID or choose *Whole channel* to apply the word to all channel's sender IDs.
4. *Effective from / Effective till:* set the opt-out word validity period (in the user's time zone as per Agreement).

5. Click  to save or  to discard the changes.

NOTE: After the recipient opted out of messaging, they still can opt back in by sending any MO message thus lifting the block from the channel and the Sender ID regardless of the channel type.

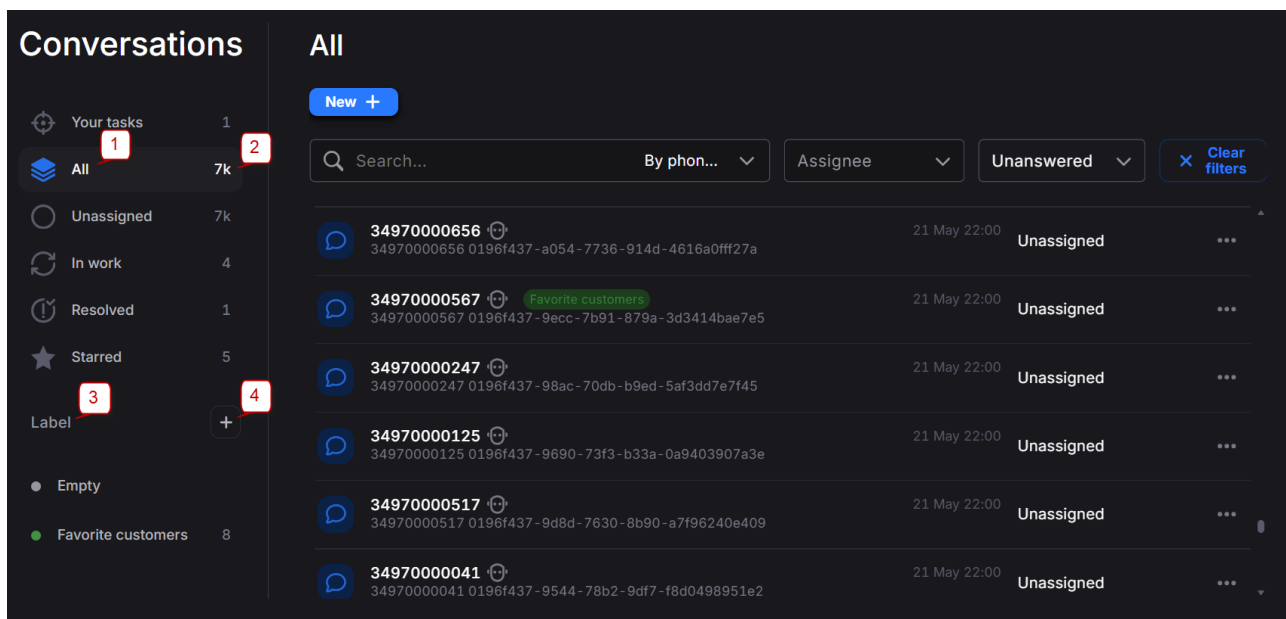
9 Conversations

9.1 Conversations

The *Conversations\Conversations* section allows human agents to start or continue any thread with any contact within the entire communication history. A thread is the communication history of a particular contact, including manual and chatbot conversations, as well as sent broadcasts.

NOTE: Only the conversations assigned to the user's department are displayed to the user on the *Conversations* page.

NOTE: *Admin* department users have access to all conversations.



The screenshot shows the 'Conversations' interface. On the left is a sidebar with filters: 'Your tasks' (1), 'All' (7k), 'Unassigned' (7k), 'In work' (4), 'Resolved' (1), 'Starred' (5), 'Label' (+), 'Empty', and 'Favorite customers' (8). The 'All' filter is selected. The main area shows a list of conversation threads under the 'All' filter. Each thread includes a phone number, a timestamp of '21 May 22:00', and the status 'Unassigned'. The first thread has a 'New +' button above it. The second thread is marked as 'Favorite customers'. The third thread has a '3' in a red box next to it. The fourth thread has a '4' in a red box next to it. The interface also features a search bar, a 'By phon...' dropdown, an 'Assignee' dropdown, an 'Unanswered' dropdown, and a 'Clear filters' button.

Conversations interface (1)


The *Conversations* interface contains the following elements and controls:

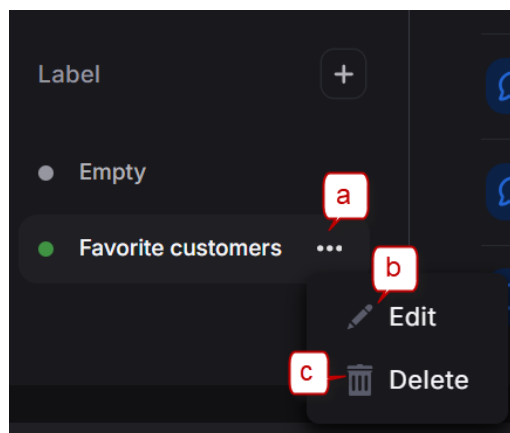
1. *Conversation groups*. These groups are preset filters. By default, the list displays the below conversation groups and the number of conversations in a group on the right (2):
 - *Your tasks*: the list of conversations that the user has as *Assignee*. When a new conversation is created, it is assigned to the user who created it, and by default it falls in the *Your tasks* group.
 - *All*: the full list of conversations (irrespective of the *Assignee*, if there are messages from the contact, etc.).
 - *Unassigned*: the list of conversations that don't have an *Assignee* (*Unassigned*). Conversations fall into this group if:
 - A contact sent a message in a *Resolved* conversation and it was not answered within a minute (timeout for a possible chatbot response);
 - The chatbot *hand over to human* script worked, given that the conversation's *Unassigned*.

NOTE: If a message is generated from the System (e.g. during a broadcast or chatbot initialization), the conversation doesn't fall to the *Unassigned* group.

- *In work*: the list of conversations that have an Assignee and are not marked as *Resolved*.
- *Resolved*: the list of conversations that have been marked as *Resolved* and have no new messages from the contact. When the conversation is marked *Resolved*, the *Assignee* is reset. The *Resolved* mark is removed when the contact replies, in this case the conversation is moved to the *Unassigned* group.
- *Starred*: the list of conversations added to the *Starred* list (marked with an asterisk) is customized personally by the user.

NOTE: When a group is selected, the conversations that correspond to the selected group are displayed in the table.

2. *The number of conversations in a group.*
3. *Labels*: the list of custom tags that can be applied to conversations and act as global filtering parameters. When multiple labels are selected, only those that belong to all selected labels should be displayed in the list of conversations (operates by logical AND that returns true only if both of its operands are true). The number of conversations with the selected tag is displayed on the right. When the first conversation is created manually, the *Empty* tag appears in the tag list. Hover over the tag and press  ((a) as shown in the figure below) to display the actions that can be performed on a label:





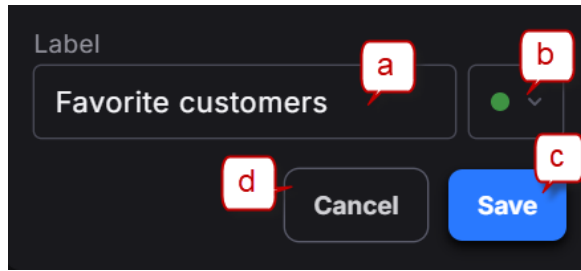
Actions with labels

- a. Click to open the *Actions with labels* menu.
- b. *Edit*: click to open the *Add/Edit label panel* and proceed as described below.
- c. *Delete*: click to delete the label.

Click outside to close the panel.

4. *Add/Edit label panel*: serves to add/edit a label. The panel can be opened in the add and edit modes.

In the *Add* mode the panel is opened by pressing the *Add label*  button. In the *Edit* mode the panel is opened by pressing the *Edit*  **Edit** button in the *Actions with labels* menu: the selected tag is displayed in the input control, and the color of the corresponding tag is displayed in the color drop-down list. The panel contains a form with the following controls:



Add/Edit label panel

a. Text input field.

NOTE: This field can't be left empty. In the *Add label panel* this field is empty by default.

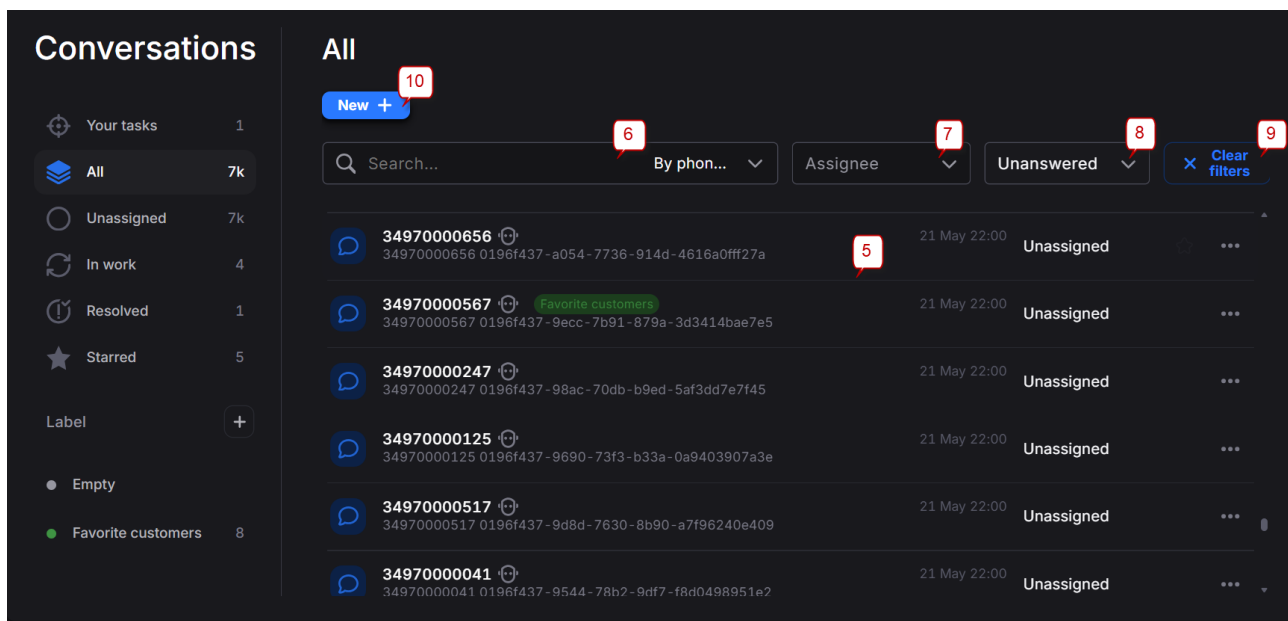
b. Drop-down label color selection list. Five colors are available: Grey, Red, Blue, Orange, and Green. The selected color will be used as the label color in the *Conversations* table.

NOTE: In the *Add label panel* the default label color is blue.

c. *Save*: the button used to update or save a label.

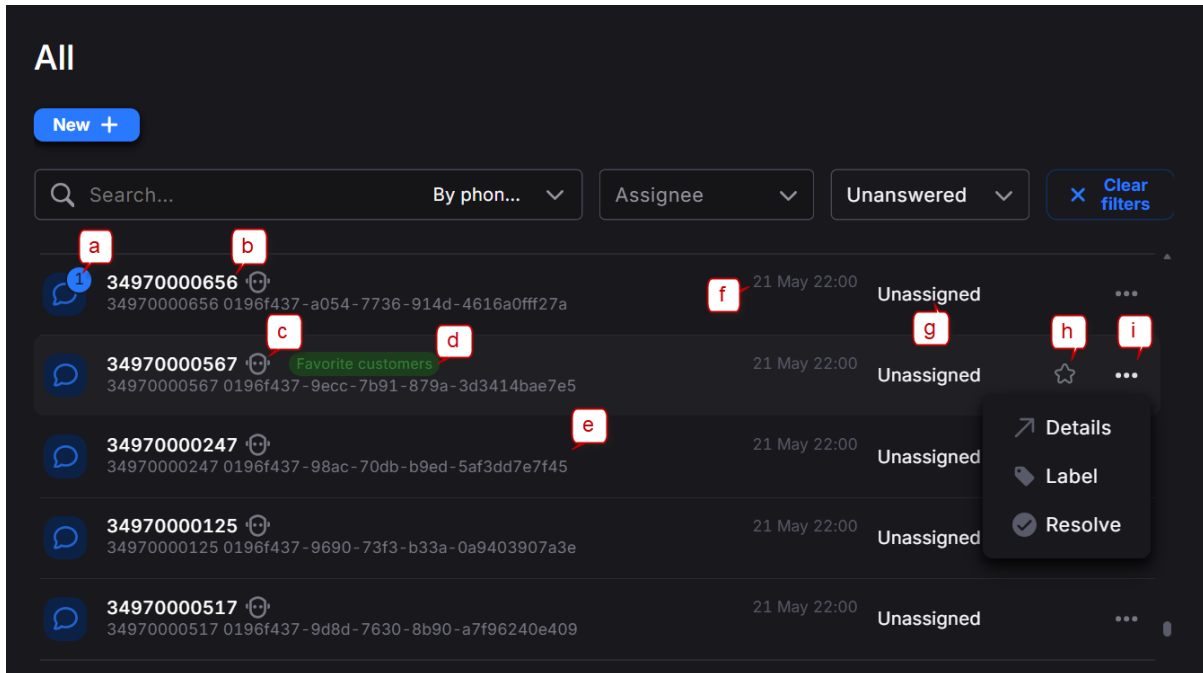
d. *Cancel*: the button used to discard changes and close the panel.

Click outside to close the panel.



Conversations interface (2)

5. *Conversations table* is a list of messages between the company's representative(s) and its potential and existing customer(s). The title of the table is the name of the group or label the user has selected. The sorting is applied from the latest to the oldest message, conversations with a *Star*, if any, are displayed above, then all other conversations. The table consists of the following unnamed columns:



Conversations table

- a. *Icon* that shows the number of unread MO messages. If there are > 99 messages, this number is displayed as 99+, if there are no unread messages, the number is not displayed. When the user opens the conversation, the counter of unread MOs is reset, when a new MO message is received, the number is increased accordingly to the number of new unread MOs.
- b. *Contact number*: displays the contact's first and last name (if any) and contact's number, WeChat ID or email.
- c. *Chatbot icon*: displayed for conversations that involved a chatbot.
- d. *Tag(s)* attached to the conversation.
- e. *Preview of the last message*. If the message does not fit in, the full preview is displayed when hovering over the text (with a 1 second delay).
- f. *Date and time of the last message*.
- g. *Assignee*: the user selected as assignee. *Unassigned* is displayed by default.
- h. *Star* emphasizes the importance of the conversation and is applied by a click from the user as appropriate.
- i. *Actions*:
 - *Details*: click to view the [Conversation page](#)¹⁰⁶.
 - *Label*: click to add one or more labels.
 - *Resolve*: click to remove *Assignee* and send the conversation to the *Resolved* list.

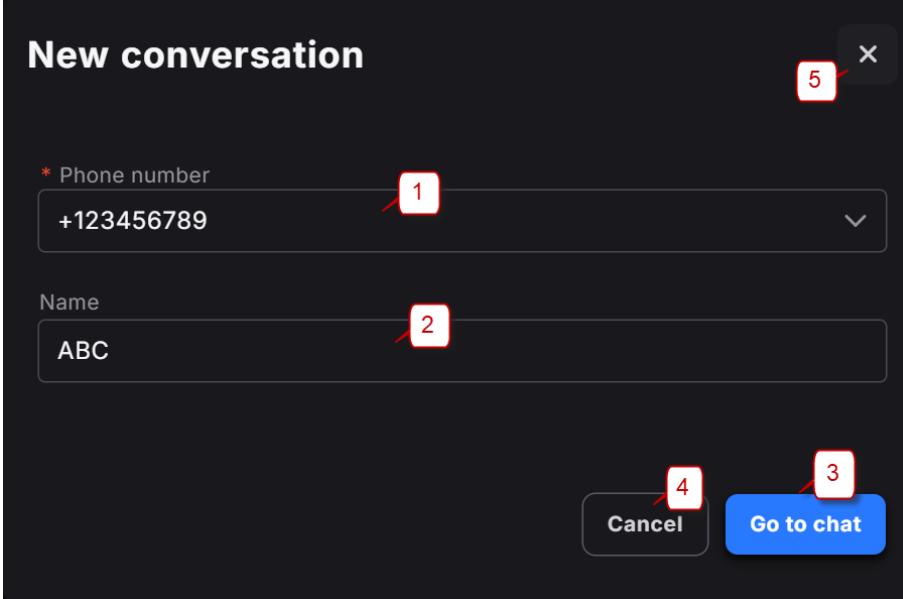
Click on the conversation in the table to view the conversation page.

- 6. *Search* serves to perform an end-to-end search within the selected category. The search is based on partial matches. By default, the search field is empty. It allows searching for a conversation by the following criteria:

- a. *By phone numbers*: by phone number (a substring or the exact match value can be entered). If the user types a number that is not registered in the System, the user can start a conversation, and the number will be saved in the [Contacts](#) database.
 - b. *By email*: by email address. Displays all the conversations with the matching email.
 - c. *By content*: by conversation text (a substring or the exact match value can be entered). All conversations that contain at least one match are displayed. The latest message is displayed in the conversation preview.
 - When *By content* search is selected *Pick a date filter* becomes available. It serves to perform additional filtering within the group by the date of sending/receiving a message or by the date range when the message was sent/received. The user can specify the date manually in the DD.MM.YYYY format, or use the calendar.
 - Clicking on a conversation opens a conversation page with all matching messages of the selected conversation listed in the search panel. The search bar in the right-hand panel contains the match value that the user specified.
 - d. *By WeChat ID*: displays all the conversations with the matching WeChat ID.
7. *Assignee* allows additional filtering within the group by the selected assignee. Filtering is based on the dropdown list of users. It is displayed only for *All* and *In work* groups. If displayed, the control is empty by default.
 8. *Unanswered messages filter*. Displayed for all groups except *Resolved*. Filtering is performed within the drop-down list:
 - All (selected by default);
 - Unanswered. If this option is selected, only those conversations that require a response from the user are displayed in the *Conversations* table.
 9. *Clear filters*. Click to reset all filters of the *Conversations* table to default values. The control is hidden by default and is displayed only if at least one filter has been applied.
 10. *New* button serves to add a new conversation. Click to add a new conversation and proceed as described below.

9.1.1 New conversation

Click *New* +  to add a new conversation and proceed as described below.



New conversation panel

Specify the following data:

1. *Number*: phone number of a contact (required).

NOTE: Use the "+" symbol (optional) and numbers. Minimum number of characters is 3, maximum - 20.

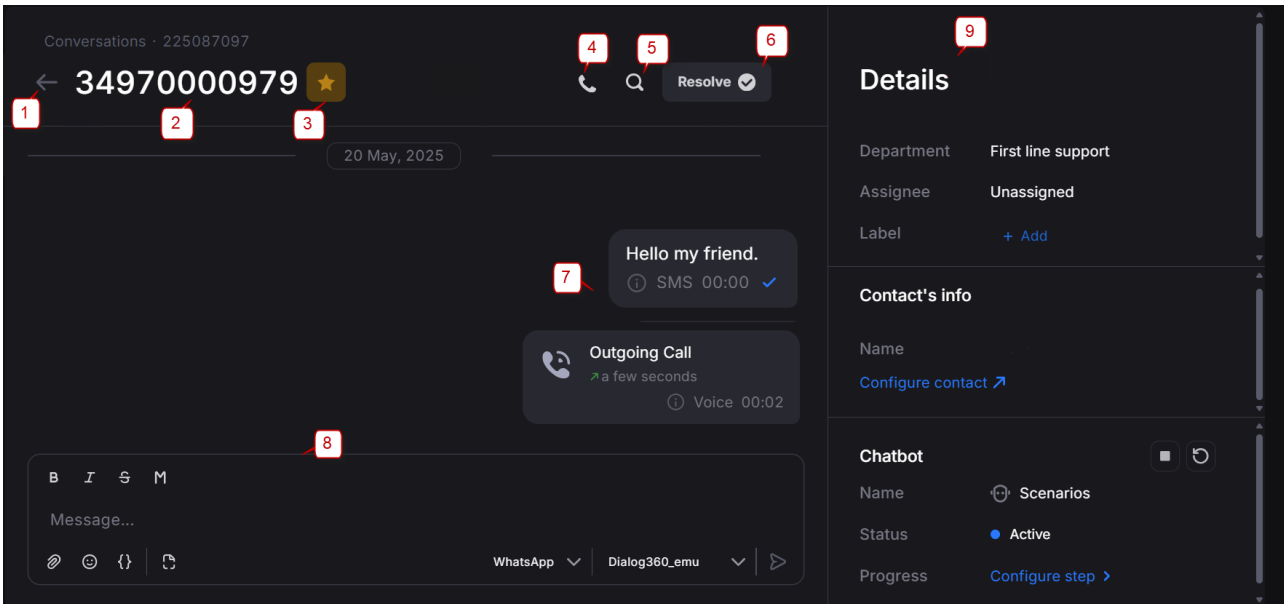
2. *Name*: contact name (optional).

NOTE: Use text to specify the name of the contact. Minimum number of characters is 1, maximum - 256.

3. *Go to chat* button. Click to save the contact to the database and open an empty conversation page. The new conversation is assigned to the user who created it and is saved in the *Your tasks* group with the *Empty* tag.
4. *Cancel* button. Click to discard the settings and close the panel.
5. Click to close the panel or click outside.

9.1.2 Conversation page

The *Conversation* page consists of two panels. The left panel is the chat panel where the company's representative and the contact communicate, and the right part is the *Details* panel that contains the conversation details and the *Contact's info*. The page contains the following data and controls:

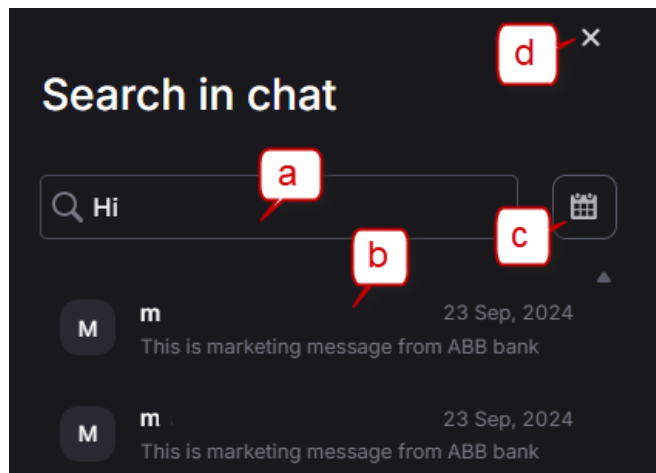


Conversations page (1)

1. *Back button*: serves to return the user to the *Conversations* interface.
2. *Contact*: displays the contact's first and last name (if any) and contact's number, WeChat ID or email.
3. *Star*: serves to add or remove a conversation from the *Starred* group. Click on the icon to apply.
4. *Voice call*: serves to select *Voice Sender ID* and make outgoing calls from the interface.

NOTE: In case no *Voice Sender ID* is available, the icon will not be displayed.

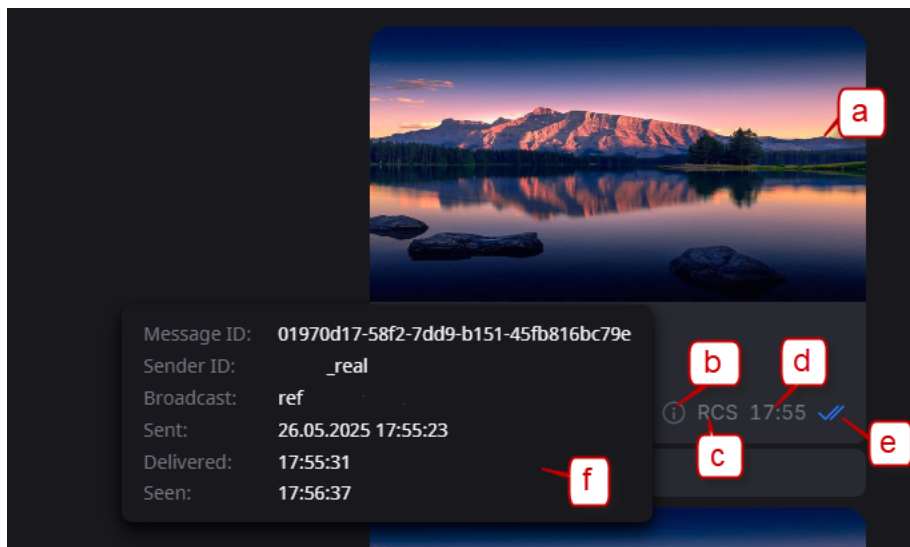
5. *Search*: serves to open the *Search in chat* panel that has the below controls.



Search in chat panel

- a. Enter the value in the search bar to perform a partial or full match search within the selected conversation.
- b. Click to select the message. All messages display the icon, the sender, the message preview and the date.
- c. Use the calendar to set the date for the search.
- d. Click to close the *Search in chat* panel.

6. *Resolve* button: serves to remove the *Assignee* and add the conversation to the *Resolved* group. The button is displayed for the conversations that have new messages from a contact. The button is hidden in the resolved conversations.
7. Messages in a conversation. Messages sent by a contact are displayed on the left, user messages are on the right. The chat panel can contain both text messages and media messages. Messages in the panel are displayed as a preview on the contact's device. If an error occurred when a user sent a message, an icon of this error will be displayed to the left of the corresponding message. Each message has the following elements:



Messages in a conversation

- a. Message content.

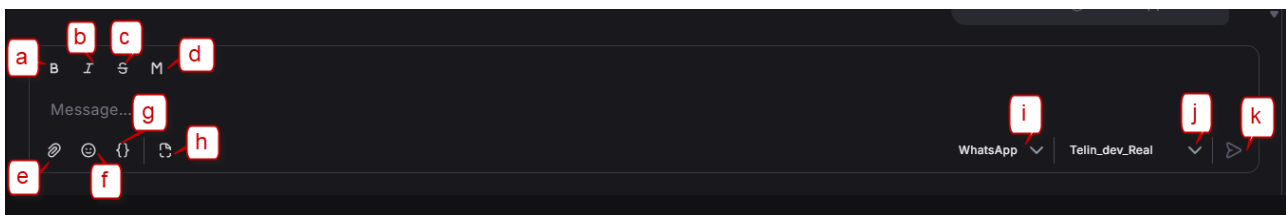
NOTE: WhatsApp messages can display reactions applied by a contact.

NOTE: In case a message was sent via Email, the subject of the message is displayed instead of the message content. If the message doesn't have a subject, Email (no subject) is displayed.

- b. Info icon. Hover over the icon to display the message details.
- c. The channel used to send the message.
- d. The time when message was sent.
- e. Message delivery status indicator.
- f. Info panel that displays the following message details.
 - *Message ID*;
 - *Sender ID*;
 - *Thread ID*: ID of the message thread. It is displayed for chatbot messages;
 - *Operator name*: name and surname of the user who replied to the message. Displayed for messages sent via the *Conversations* interface;
 - *Broadcast*: the name of message broadcast. Displayed for messages sent via the *Broadcasts* interface;
 - *Chatbot*: the name of the message chatbot. Displayed for chatbot messages;

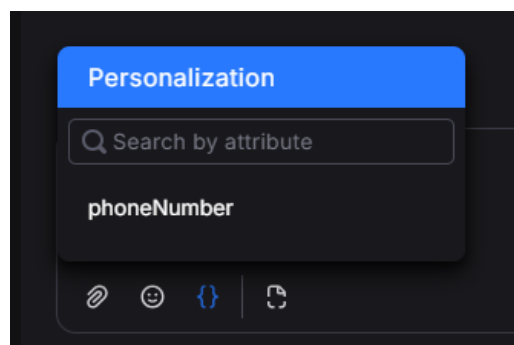
- *Sent*: the time the message was sent;
- *Delivered*: the time when the message was delivered. Displayed only for the messages that didn't return an error;
- *Seen*: the time when the message was seen. Displayed only for the messages that didn't return an error;
- *Error*: error text. Displayed only for messages that returned an error.

8. *Message edit panel*. Enter the message text in the edit box, and use the following controls as appropriate (please, note that the available controls differ based on the selected communication channel).



Message edit panel

- a. *Bold*. Available for Whatsapp Sender IDs.
- b. *Italics*. Available for Whatsapp Sender IDs.
- c. *Strikethrough*. Available for Whatsapp Sender IDs.
- d. *Monospaced text*. Available for Whatsapp Sender IDs.
- e. *Select file*. Available for Whatsapp, RCS, Viber, WeChat Sender IDs (for instructions on uploading files to the media database refer to [Assets\Media](#)^[142]).
- f. *Emoticon*. Available for all Sender IDs.
- g. *Personalization*. Available for all Sender IDs. The form serves to personalize the message using attributes. For more information on attributes refer to the [Attribute manager](#)^[86].



Personalization

- h. *Templates*. Available for all Sender IDs. In this case, the message text and formatting will be taken from the template. If attributes are used in the template, they will be replaced with the contact's personal data. The user can modify the message (both the text and formatting) that will override the template values. Templates are configured in [Assets\Conversations templates](#)^[174]. Click to open the panel and select the appropriate template as described in the [Conversation page\Templates](#)^[112] section.

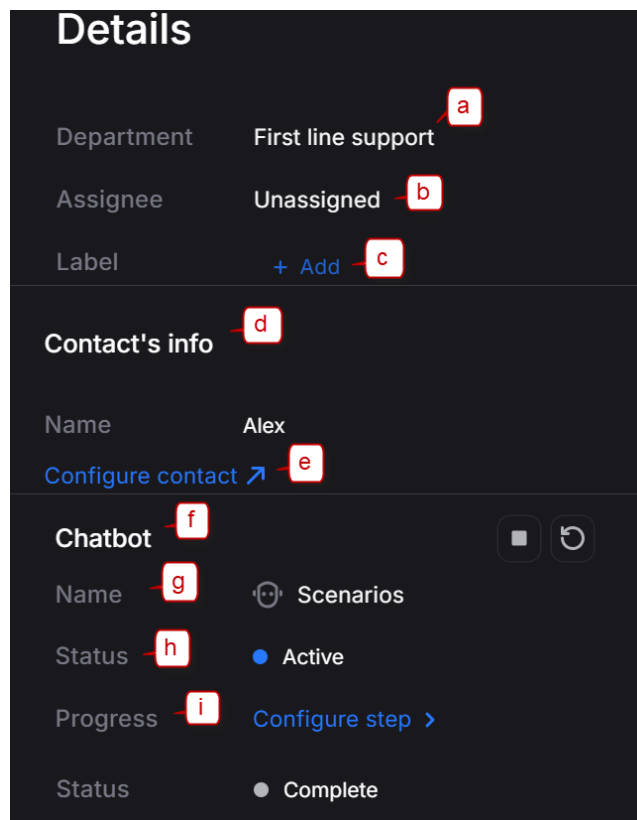
- i. *Drop-down channel list.* Click to choose the channels available for the selected conversation type. It is possible to switch between channels during the conversation.

NOTE: Due to RCS format limitations, when sending text with an attached image through the RCS channel, the text and image will be sent in two different messages.

- j. *Drop-down Sender IDs list.* Opens the list of available Sender IDs with *Active* status.
- k. *Send.* The button is inactive by default and becomes activated only when you type the message text.

NOTE: Sending messages in Email conversations is not supported.



- 9. *Details.* The panel consists of the following elements and controls:



Details panel

- a. *Department:* a drop-down list containing available departments.





NOTE: A thread can be assigned to another department. In this case the *Assignee* changes and the thread is not displayed to the previous *Assignee*.


- b. *Assignee:* a user to whom the conversation was assigned to. The value is *Unassigned* if the conversation is not assigned to any user. Click to change or select the *Assignee* from the list of the users. The search is performed by partial match.
- c. *Label:* tags that are attached to the conversation. Click  to delete the label. Click *Add*  to add a new label. Multiple additions of tags from the *Labels* list are available.
- d. *Contact's info:* parameters related to the contact's profile. The data is retrieved from the checked contact's attributes. The following information is displayed by default:

- *Name*: the contact's *Name* and *Surname* attributes. If these contact attributes are empty, the control is hidden.
- *Opt-outs*: the contact's opt-outs displayed in the format: <channel name>: <number of opt-outs for this channel>. If the contact has no opt-outs, the control is hidden. Hover over the channel to display the pop-up window that lists the channel senders, that the contact has opted out of, separated by commas. If a contact has opted out of the *Whole channel*, the pop-up window will display "*Whole channel*" - regardless of whether there are opt-outs for any channel sender.

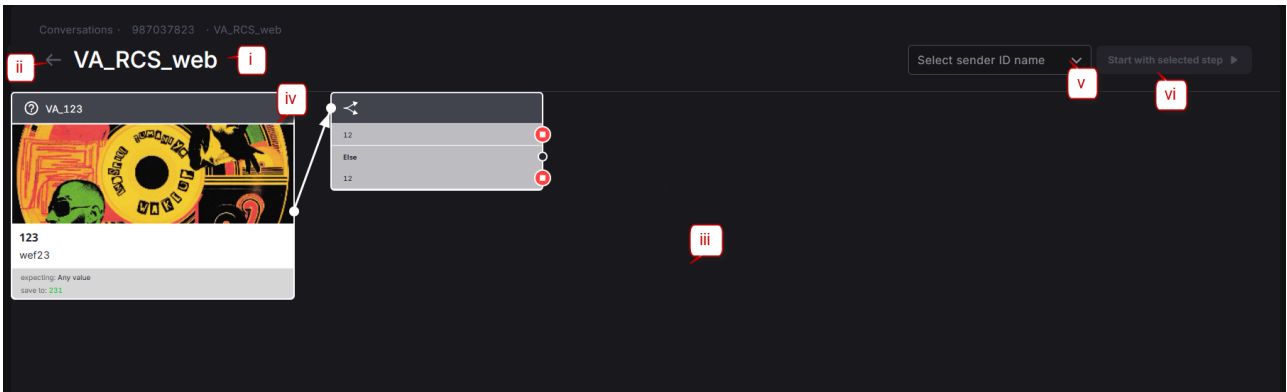
NOTE: If a contact has opted out of the *Whole channel*, the opt-outs will be displayed as "+1".

NOTE: If the contact has no attributes, "There are no attributes to display" notification is displayed.

- e. Click *Configure contact* to open the *Contacts* interface with the list of contacts filtered by the number.
- f. *Chatbot*: the chatbot that was last used in the conversation. The following controls are available:
 - Click *Stop*  to turn off the chatbot.
 - Click *Play*  to starts the chatbot from the current step. The button is hidden by default and appears after the chatbot is stopped.
 - Click *Restart*  to restart the chatbot from the start node.
- g. *Name*: the name of the last active chatbot. Click on a chatbot name to unfold the chatbot list and select another chatbot. The active chatbot is marked with  in the drop-down list. The search is done by partial match. Click on the name of another chatbot to open the chatbot panel.
- h. *Status*: chatbot status. Possible values:
 - *Error*: scenario execution is impossible due to an internal error;
 - *Active*: scenario execution is not completed;
 - *Complete*: scenario execution is completed;
 - *Timeout*: contact response timeout has expired;
 - *Stuck*: a conditional move to another step is expected, but the current event does not fit any of the possible conditions, and the thread is stuck;
 - *Handedover*: the communication has been handed over to the operator.

NOTE: If no chatbot has been employed at any stop of the conversation, only  button is displayed. Click on the button to add and initiate a chatbot. The chatbot is selected from the drop-down list of chatbots. The search is performed by partial match.

- i. *Progress*: contains a *Configure step* hyperlink that opens a preview panel of the current chatbot tree. The panel contains the following controls:



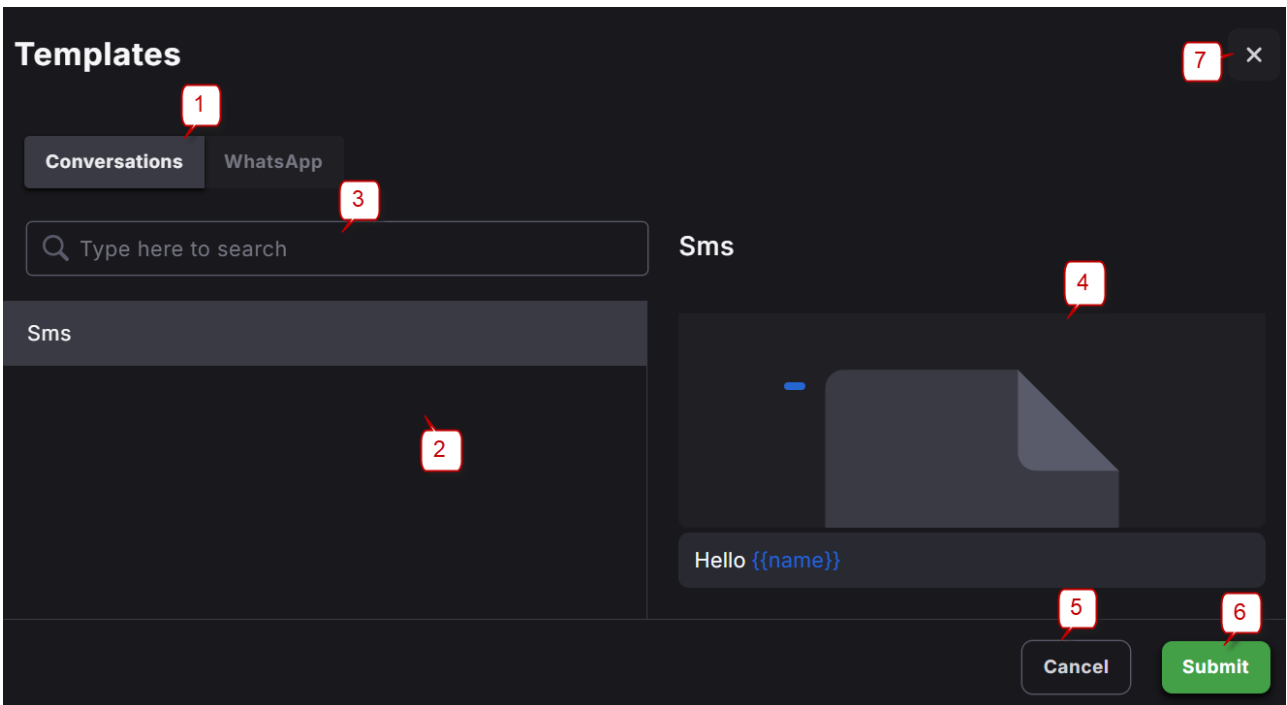
Chatbot panel

- i. The name of the chatbot.
- ii. The *Back* button that returns the user to the conversation panel.
- iii. Chatbot tree panel that displays the tree of the selected chatbot.
- iv. The node from which the chatbot will be started is highlighted. By default, the start node is selected.
- v. Select Sender ID name. Click to select the Sender ID and start with the selected step.
- vi. The *Start with selected step* button that initiates the current chatbot from the step selected in the chatbot tree panel. After starting the chatbot, the user goes to the conversation panel.

9.1.2.1 Templates

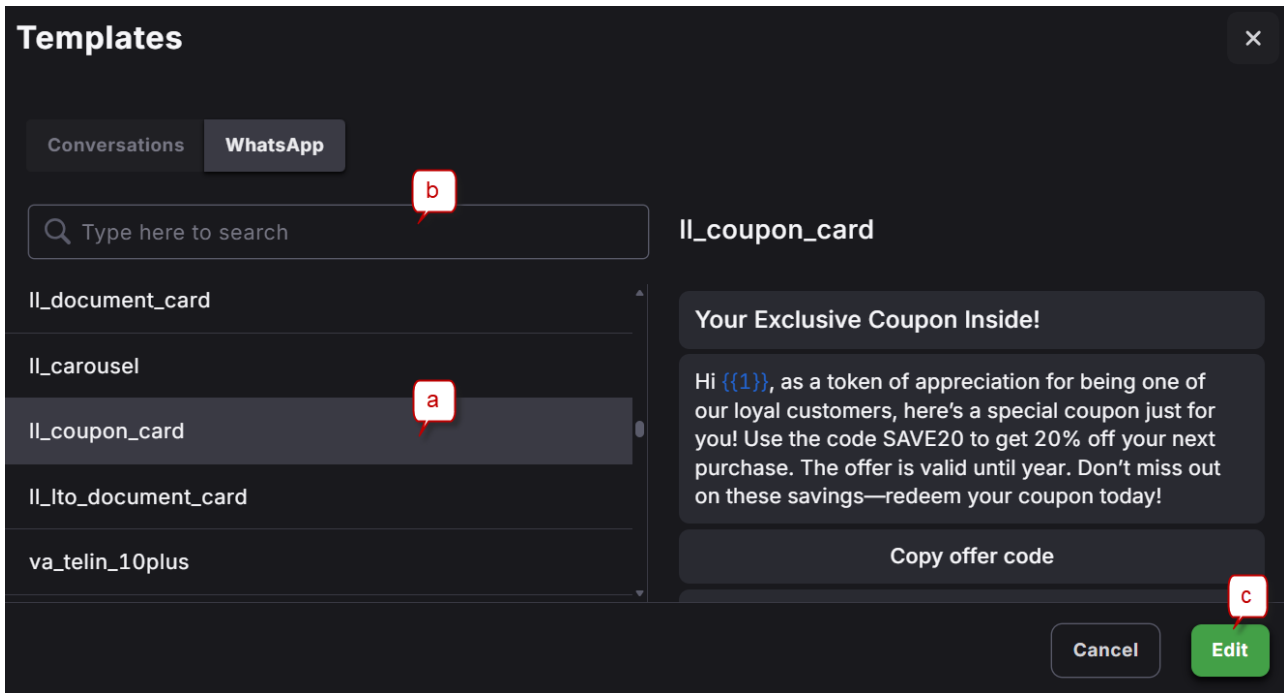


Click icon in the *Message edit panel* to select the appropriate template.



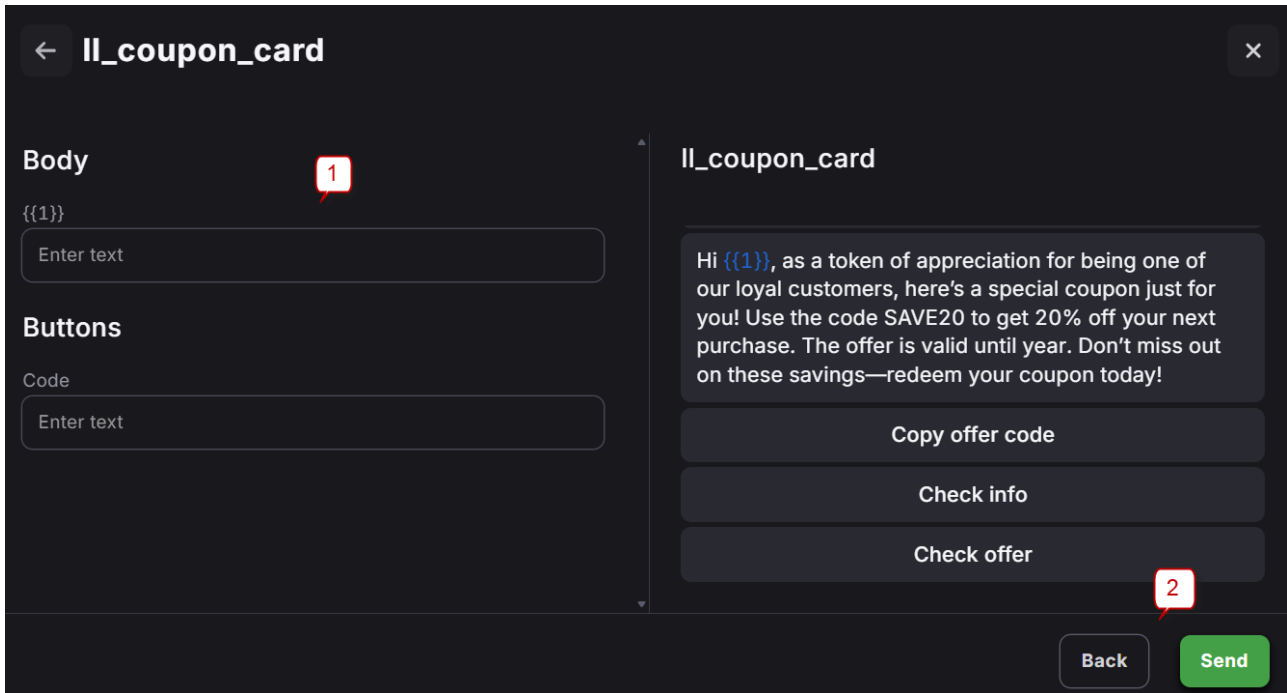
Templates panel (Conversations)

1. The *Templates* panel serves to select the appropriate template from the template database. If a WhatsApp Sender ID has been selected in the *Message edit panel*, the panel will consist of two tabs:
 - *Conversations*: conversation templates that are used only in the Conversations interface. When selected only conversation templates are displayed in the templates table. Selected by default.
 - *WhatsApp*: WhatsApp templates. When selected the templates table displays WhatsApp templates of the Sender ID selected in the *Message edit panel*.



Templates panel (WhatsApp)

- a. Click to select the template from the list.
- b. Or start typing the template name.
- c. Click to start editing the template.


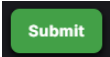


Templates panel (WhatsApp), continued

- a. Edit the content as appropriate.
- b. Click *Send* to send the message or *Back* to return to Templates.

NOTE: The *Edit* button is available for WhatsApp templates that need to be filled with content (variables, media, *Copy code* and *URL* buttons, location) before sending.

NOTE: If a Sender ID of any type other than WhatsApp has been selected in the *Message edit* panel, the WhatsApp tab is hidden and only conversation templates are displayed in the templates table.

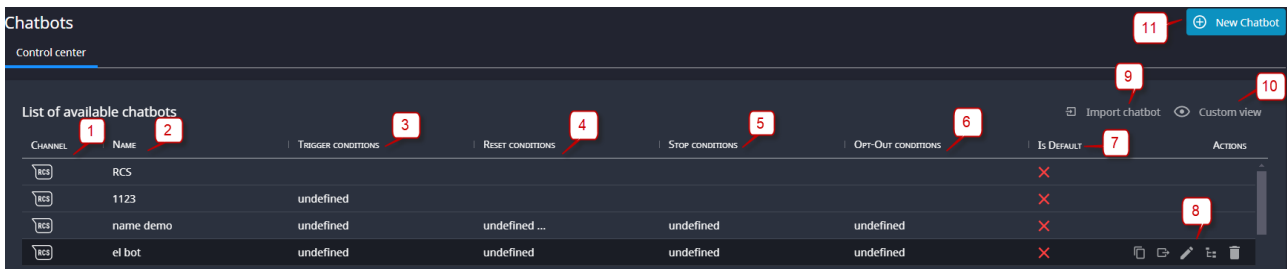
2. The table displays the available templates, filtered according to the selected tab with the list of templates (template names) available for selection on the left, and a preview of the message generated for the selected template on the right.
3. Type to search for the template.
4. Click on the template in the table to open the preview of the message generated for the selected template in the panel on the right. The message is displayed as the contact will view it on their device.
5. Click *Cancel*  to discard the changes and close the panel.
6. Click *Submit*  to submit the message and close the panel.
7. Click to close the panel.

9.2 Chatbots

The *Conversations\Chatbots* section serves to create automated two-way conversation scenarios (chatbots) with the help of a visual constructor.

The process of creation and launch consists of the following three steps:

1. Configure the general chatbot settings (as detailed in [Creating a new chatbot](#)^[116]).
2. Create a chatbot tree in the visual builder (as explained in [Configuring the chatbot in the visual editor](#)^[119]).
3. Launch the chatbot from the [Broadcasts](#)^[25] section.



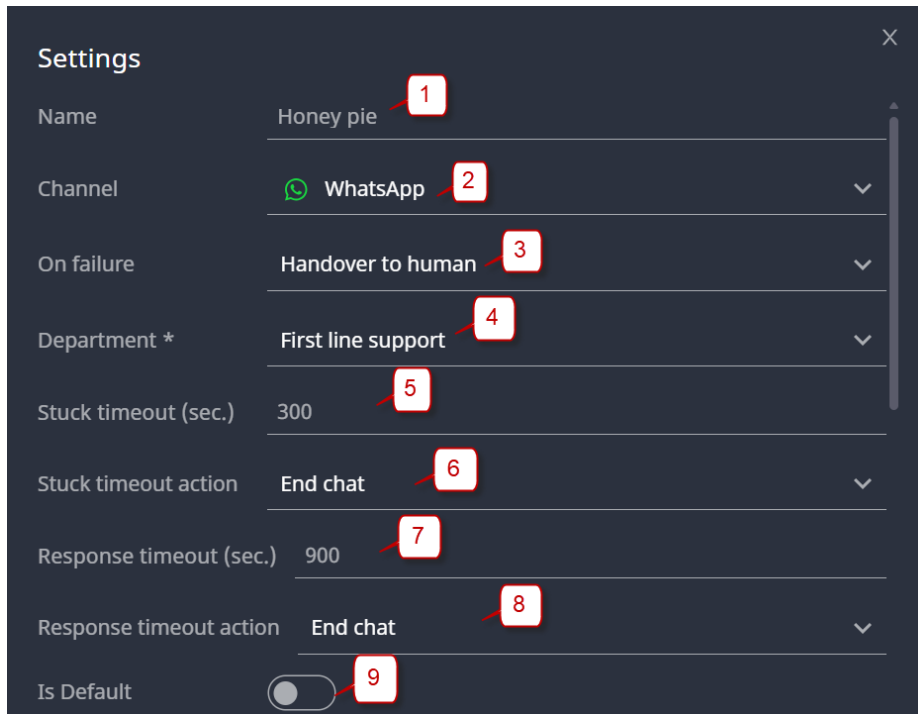
Chatbots page

The *Chatbots* page contains a table of available chatbots.

1. *Channel*: channel type (SMS, RCS, Viber or WhatsApp).
2. *Name*: chatbot name.
3. *Trigger conditions*: the word or regexp the recipient must send in an MO message to start a conversation with the chatbot.
4. *Reset conditions*: the word or regexp the recipient must send in an MO message to restart a conversation with the chatbot.
5. *Stop conditions*: the word or regexp the recipient must send in an MO message to stop a conversation with the chatbot.
6. *Opt-out conditions*: the word or regexp the recipient must send in an MO message to stop receiving messages from this chatbot.
7. *Is default*: the chatbot will run in case the MO message received from the recipient does not match any conditions of any chatbots enabled for that user.
8. *Actions*: hover to view the controls. Click  to copy the record; click  to export the chatbot; click  to edit; click  to open the visual builder; click  to delete the record.
9. Click to import a new chatbot.
10. Click to customize the display of columns.
11. Click to create a new chatbot.

9.2.1 Creating a new chatbot

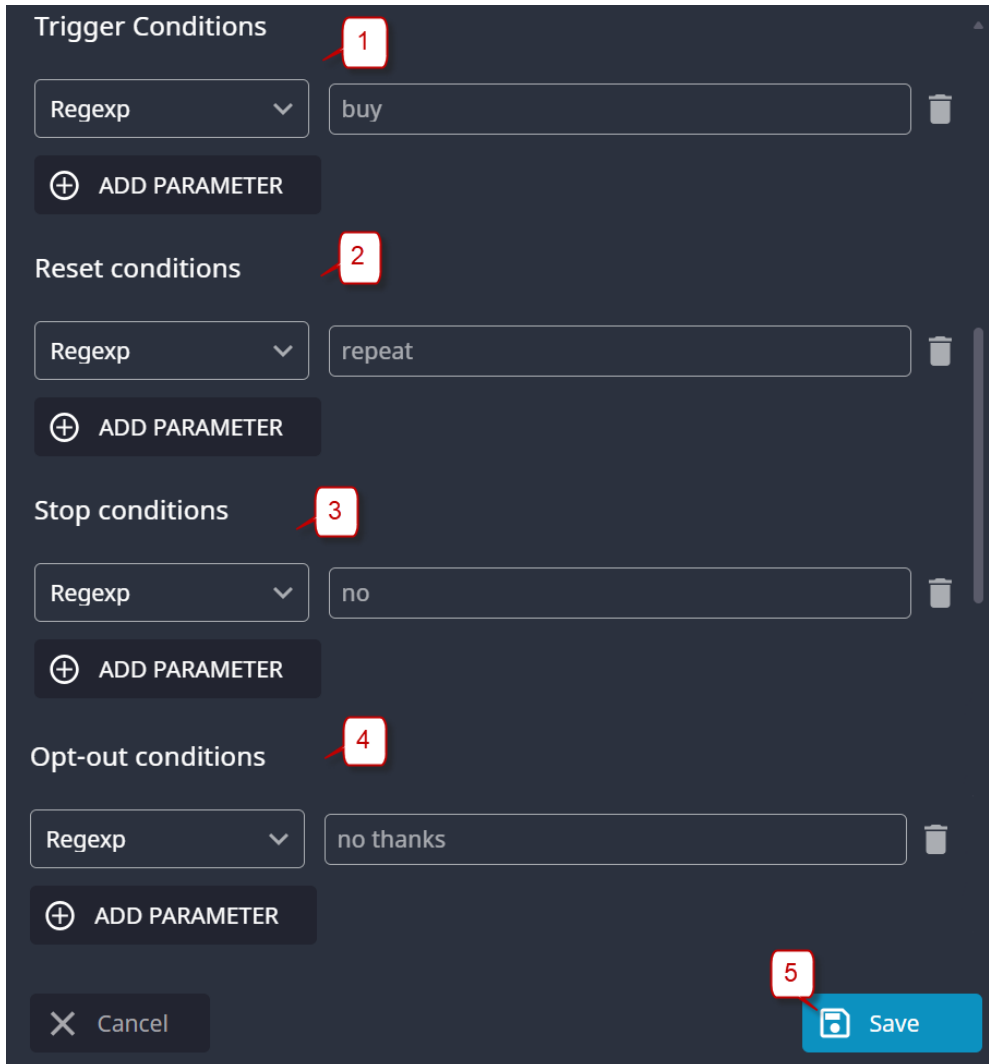
To create a new chatbot, click .



Chatbot settings, part 1

1. *Name*: enter the chatbot name.
2. *Channel*: select the channel (*SMS*, *RCS*, *Viber* or *WhatsApp*).
3. *On failure*: select the chatbot reaction on incorrect situations (for example, failure to deliver a message, code malfunction etc.). Possible values are:
 - a. *Continue*: repeat the step and continue.
 - b. *End chat*: stop the scenario for the user.
 - c. *Failover*: go to a special step programmed for this case in the scenario (the step is programmed in the [visual builder](#) ¹²⁰).
 - d. *Handover to human*: the scenario will be switched to a human agent. In the *Conversations* interface the thread that requires human response is marked with a special sign.
4. *Department*: becomes available when *Handover to human* is selected. The department that the human agent is assigned to.
5. *Stuck timeout*: period in which the chatbot can remain in the *stuck* status. This status occurs if the chatbot has not been configured properly and contains links that lead nowhere. When the timeout is over, the System goes to *Stuck timeout action*.
6. *Stuck timeout action*: select the chatbot reaction in case the *Stuck timeout* expires. Possible values are:
 - a. *End chat*: stop the scenario for the user.

- b. *Go to stuck_timeout step*: go to the *Stuck timeout* node that is activated on stuck timeout (see [Add action](#)^[120] for detail).
 - c. *Handover to human*: the scenario will be switched to a human agent. In the *Conversations* interface the thread with an expired timeout is marked as *Urgent*.
 7. *Response timeout*: period in which the user does not respond with text or any other action (clicking the link, button etc.). Select the timeframe in seconds. When it is over the System goes to *Response timeout action*.
 8. *Response timeout action*: select the chatbot reaction in case the *Response timeout* expires. Possible values are:
 - a. *End chat*: stop the scenario for the user.
 - b. *Go to response_timeout step*: go to the *Response timeout* node that is activated on response timeout (see [Add action](#)^[120] for detail).
 - c. *Handover to human*: the scenario will be switched to a human agent. In the *Conversations* interface the thread with an expired timeout is marked as *Urgent*.
 8. *Is default*: when enabled, the chatbot will run in case the MO message received from the recipient does not match any conditions of any chatbots enabled for that user.



The screenshot shows a configuration interface for chatbot settings. It is divided into four sections, each with a 'Regexp' dropdown menu and a text input field. A red box with a number highlights a specific element in each section: 1. Trigger Conditions: 'buy' in the input field. 2. Reset conditions: 'repeat' in the input field. 3. Stop conditions: 'no' in the input field. 4. Opt-out conditions: 'no thanks' in the input field. Below the sections are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a red box and the number 5.

Chatbot settings, part 2

The fields illustrated in the figure above serve to set the keywords that the recipient must send in an MO message to start a conversation with the chatbot.

Select the *Regexp* value (the other options are coming soon). Type a keyword or regular expression (MySQL regular expressions are supported). Only one word or expression per field are allowed. To add one more keyword, click **+** ADD PARAMETER. The number of keywords is unlimited.


1. *Trigger conditions*: configure word or regexp the recipient must send in an MO message to start a conversation with the chatbot.

NOTE: If the MO message matches the *Trigger conditions* of multiple chatbots, no chatbot is started.

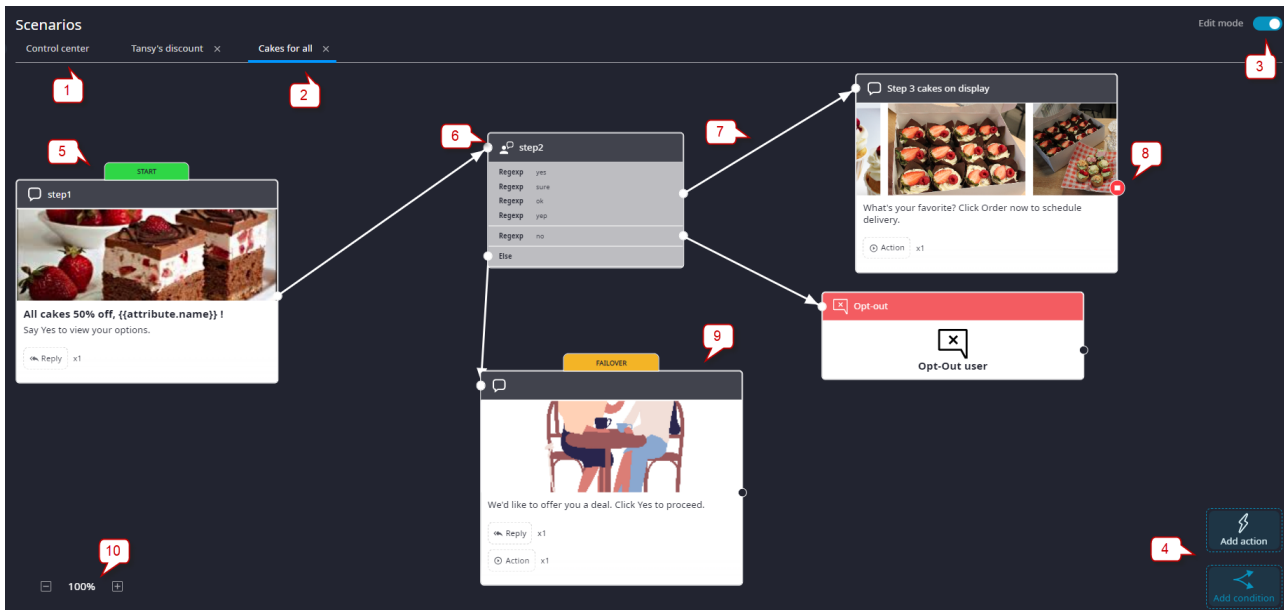
2. *Reset conditions*: configure the word or regexp the recipient must send in an MO message to restart a conversation with the chatbot.
3. *Stop conditions*: the word or regexp the recipient must send in an MO message to stop a conversation with the chatbot.
4. *Opt-out conditions*: the word or regexp the recipient must send in an MO message to stop receiving messages from this chatbot over this channel.
5. Click **Save** to save the chatbot.

The record will appear in the [table of chatbots](#) ¹¹⁴.

9.2.2 Configuring the chatbot in the visual editor

In the [table of chatbots](#) ¹¹⁴ hover over the newly created record and click  to open the visual chatbot builder. It allows building chatbot scenario trees.


A chatbot scenario tree is a sequence of the System's messages (actions) and user responses (conditions). The next action depends on the response given by the user on the previous step. Blocks programmed for cases of Failover, Opt-out, Stuck and Response timeouts are also part of the scenario.




Visual chatbot builder

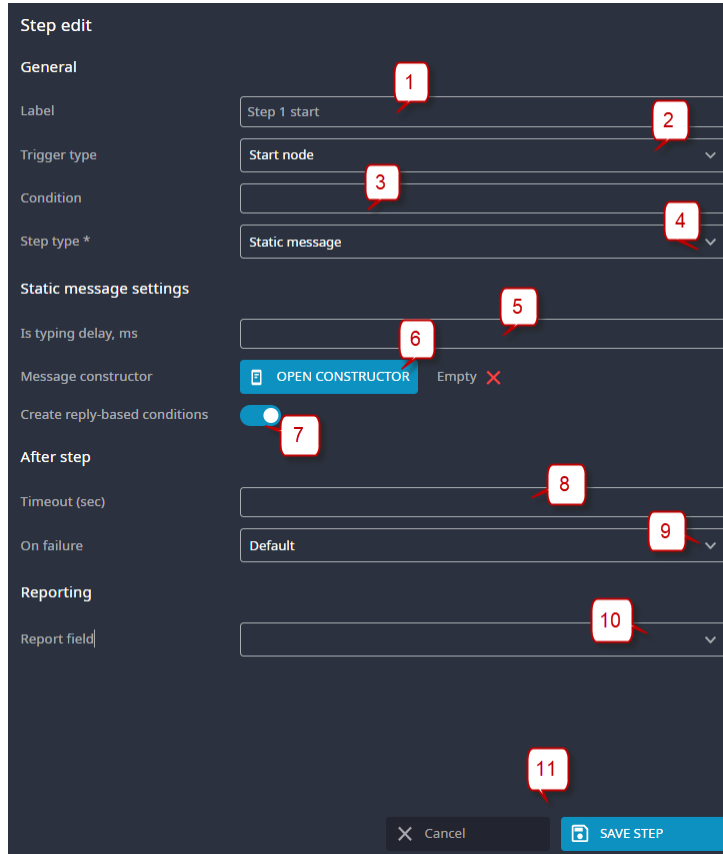
1. Click to open the [table of chatbots](#) ¹¹⁴.
2. Click to open the tab with the chatbot scenario tree in the visual builder.
3. Toggle the switch to the *Edit mode* to enable editing the tree.
4. Drag&drop *Add action* to the canvas to create a message from the System. *Action* nodes have a white background (see 5). Drag&drop *Add condition* to the canvas to create the user response. *Condition* blocks have a gray background (see 6).
5. The first *Action* node has the *Start* tab on top. It starts the scenario.

NOTE: The first *Action* node in the scenario must always be the *Start* node.

6. Add a connection between the nodes. The arrows point to where the scenario flows.
7. Start the arrow from the body of the node and stick it to the header of the node for linking action and condition nodes.
8. Mark the finish node of the scenario tree with  as shown in the figure above.
9. Add a Failover node that will be used in case of failure. It has the *Failover* tab on top. Add other types of *Action* nodes if necessary (*Failover node*, *Stuck timeout node*, *Opt-out node*). They are explained in [Add action](#) ¹²⁰.
10. Use the control to customize the view scale.

9.2.2.1 Add action

When you drag and drop the *Add action* block to the canvas, the editing panel opens. Set up the action there. Click  after editing is finished and the action node will appear on the canvas.



The screenshot shows the 'Step edit' dialog box with the following fields and callouts:

- 1: Label input field (containing 'Step 1 start')
- 2: Trigger type dropdown menu (set to 'Start node')
- 3: Condition input field
- 4: Step type * dropdown menu (set to 'Static message')
- 5: Is typing delay, ms input field
- 6: Message constructor button (labeled 'OPEN CONSTRUCTOR')
- 7: Create reply-based conditions toggle switch (turned on)
- 8: Timeout (sec) input field
- 9: On failure dropdown menu (set to 'Default')
- 10: Reporting dropdown menu (set to 'Report field')
- 11: SAVE STEP button

Action step editing

Configure the following parameters (those marked with an asterisk * are required):

1. *Label*: step name.
2. *Trigger type*: type of the node. Possible values are:
 - a. *Start node*: the first node in the chatbot scenario. A scenario must ALWAYS start with a start node.
 - b. *Failover node*: the node that will be activated in case of some incorrect situation (for example, failure to deliver a message, code malfunction etc.)
 - c. *Response timeout node*: the node that will be activated in case the recipient's *Response timeout* expires (configured in general chatbot settings, see [Creating a new chatbot](#)^[116]).
 - d. *Stuck timeout node*: the node that will be activated in case the recipient's *Stuck timeout* expires (configured in general chatbot settings, see [Creating a new chatbot](#)^[116]).
 - e. *Opt-out node*: a message that is sent if the recipient sends an opt-out word (configured in the *Opt-out conditions* parameter in general chatbot settings, see [Creating a new chatbot](#)^[116]).
 - f. *Regular node*: a regular message from the System.
3. *Condition*: when set, the node is only executed if the specified condition is true. If false, the step is not executed and the chatbot scenario moves to the next node. If not set, the node is always


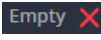

executed. A condition is a logical expression that includes variables employed in the chatbot thread (in its messages). All postgres variables can be used. Also, subexpressions can be grouped in parentheses and combined with the help of the logical AND and OR or NOT. An example of an expression:





```
length('{{attribute.name}}' >= 5 or ('{{attribute.city}}' = 'Chicago' and '{{attribute.Country}}' <= 3)
```

which means that the condition will be resolved as true if the *name* attribute is equal to or longer than 5 symbols, OR the *city* attribute is *Chicago* and the *Country* attribute is equal to or shorter than 3 symbols.

4. *Step type*: type of the message. Possible values include:
 - a. *Opt-out user*: select to unsubscribe the user from the Sender ID. Select the checkbox *Opt-out from whole channel* to unsubscribe the user from the entire channel.
 - b. *Static message*: a regular message that may or may not require a response from the user.
 - c. *Dynamic message*: a message the content of which is based on the recipient's response (for example, the recipient can request the nearest shop, and get a list according to their current location).
 - d. *Ask question*: replies that the recipient gives during the flow will be saved as variable value (specified in the field *Save response to*).
 - e. *Execute code*: the message gives a command for code execution, for example, place an order in a third-party system. Unlike the Dynamic message type, the result of the execution of the script is not displayed directly in the message.

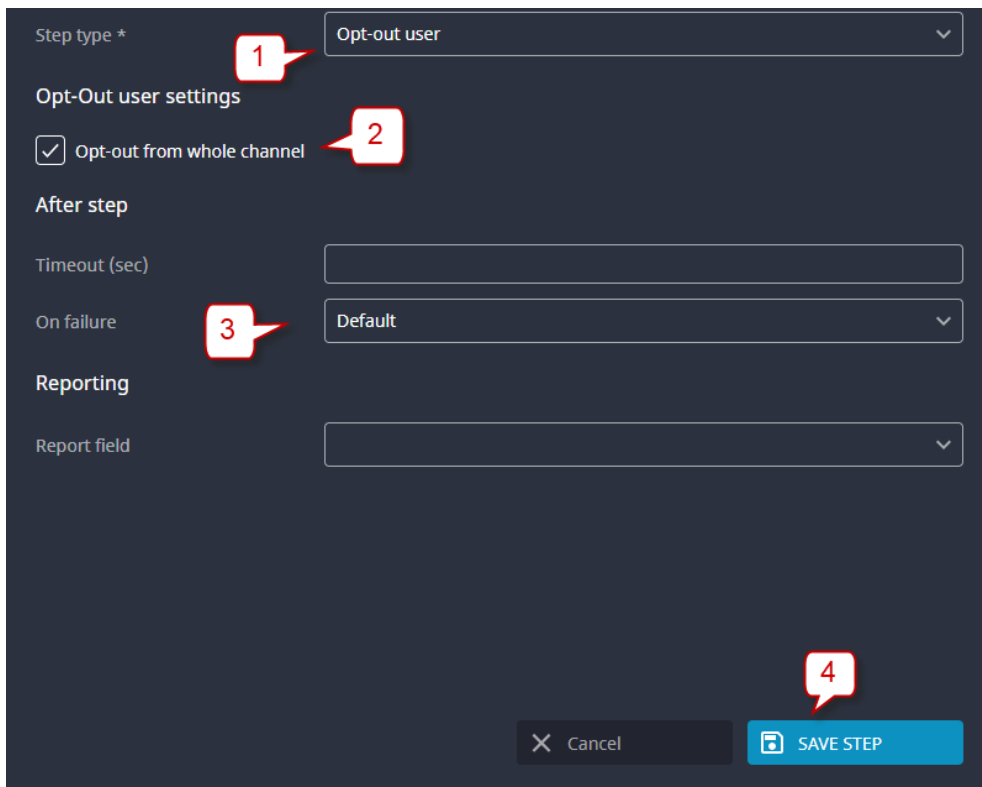
NOTE: If you need help writing the script, contact the technical support team of your System supplier.

- f. *Jump to...*: switch the user to another scenario, for example, payment or delivery when the purchase is complete. If the value is *Jump to...*, the checkbox *Pass context* appears. When selected, the new chatbot will be executed in the original thread, with all the variable values preserved. When deselected, the current thread will be closed after switching to the new chatbot, and a new thread will be opened; all variable values collected in the previous thread will no longer be available.
 - g. *Reset chat and start over*: start the chat from the beginning.
 - h. *Handover to human*: hand over the conversation to the human operator.
5. *Is typing delay, ms* (available if *Step type* = *Static message*, *Dynamic message*, or *Ask question*): a timeout before the chatbot's next message (to simulate the chatbot typing a response). If left empty, the chatbot sends the message immediately with no delay.
6. *Message constructor* (available if *Step type* = *Static message*, *Dynamic message*, or *Ask question*): serves to create the message for the node. Click  to open the Message constructor. Create a message according to the channel type chosen for this scenario in [Chatbot settings](#)^[116]. The indicator  shows that no message has been configured in the constructor. Otherwise, the indicator  is displayed.
7. *Create reply-based conditions*: switch it on to create an interactive message. The suggested replies configured within the message will be transformed into a condition step automatically.
8. *Timeout (sec.)*: the timeout allowed before going to the next step. If the step is not completed after the timeout, the System considers the chatbot as failed, and the chatbot proceeds to the action configured the *On failure* setting.


9. *On failure*: select the chatbot reaction in case the timeout is exceeded. Possible values include:
 - a. *Default*: switch to the chatbot marked as *Default*.
 - b. *Continue*: repeat the step and continue.
 - c. *End chat*: stop the scenario for the user.
 - d. *Failover*: go to a special step programmed for this case in the scenario (the step is programmed in the visual builder).
 - e. *Handover to human*: the scenario will be switched to a human agent. In the Conversations interface the thread that requires human response is marked with a special sign.
10. *Reporting*: select or create a field to include this step in the report in BackOffice. To create a new field, click on drop-down list. In the edit box that appears, enter the report field name and click  next to it.
11. Click *Save step*  **SAVE STEP**. It will appear on the canvas as illustrated in [Configuring the chatbot in the visual editor](#) . Click *Cancel*  **Cancel** to discard the settings.


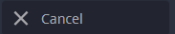
9.2.2.1.1 Step type: Opt-out user

If *Step type: Opt-out user* is selected the user will be unsubscribed from the Sender ID.



Step type: Opt-out user

1. Select *Step type* = *Opt-out user*.
2. Select the checkbox *Opt-out from whole channel* to unsubscribe the user from the entire channel.
3. Configure other parameters as appropriate (see [Add action](#)  for details).

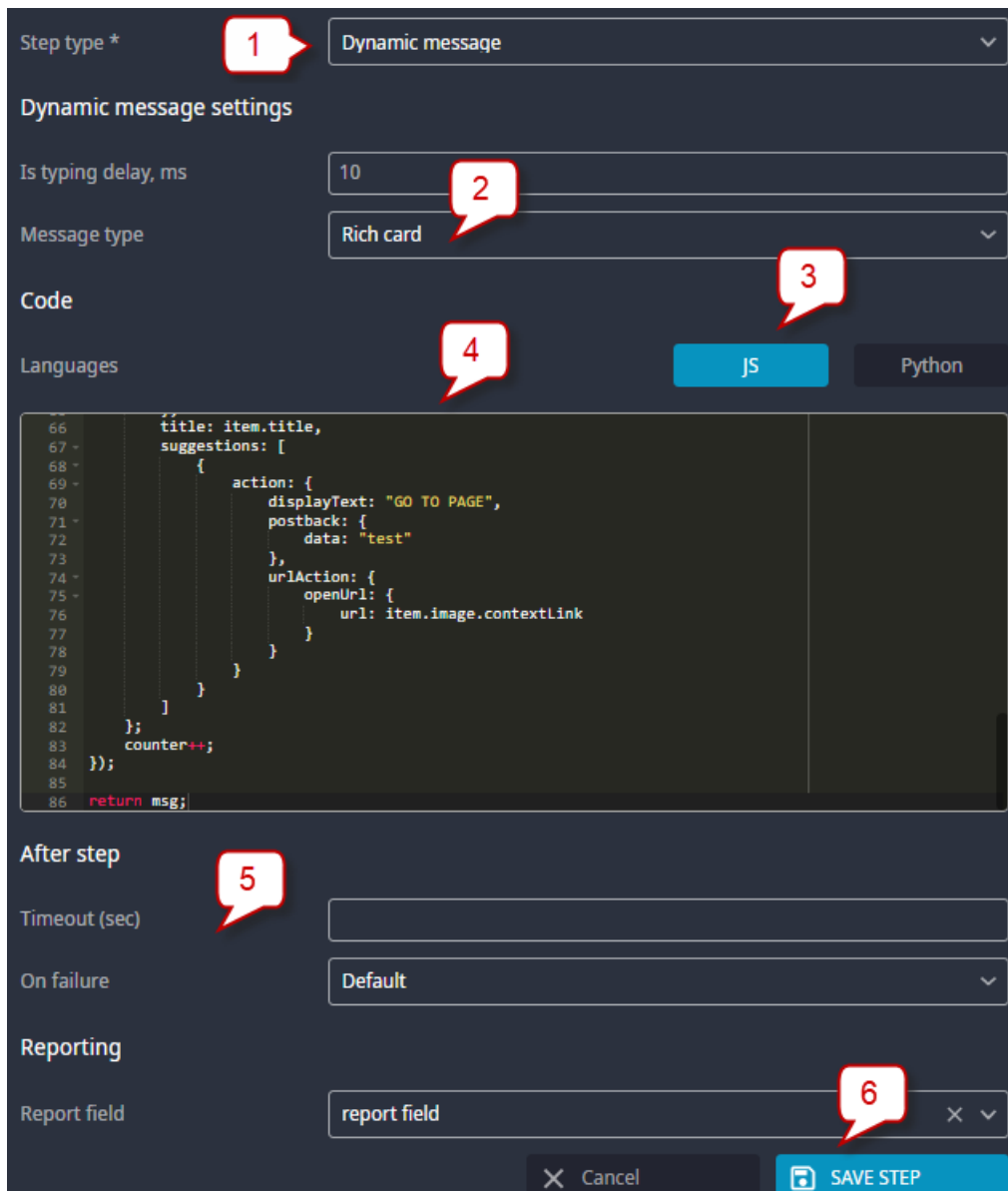
- Click Save step  , it will appear on the canvas as illustrated in [Configuring the chatbot in the visual editor](#)¹¹⁹. Click Cancel  to discard the settings.

9.2.2.1.2 Step type: Static message

A static message is a regular message that may or may not require a response from the user, based on the parameters configured in the Message constructor. Creation of a static message is illustrated in the section above ([Add action](#)¹²⁰).

9.2.2.1.3 Step type: Dynamic message

Dynamic messages are messages the content of which is based on the recipient's response (for example, the recipient can request the nearest shop, and get a list according to their current location).



Step type * **1** Dynamic message

Dynamic message settings

Is typing delay, ms **2**

Message type **3**

Code

Languages **4** JS Python

```

66     title: item.title,
67     suggestions: [
68       {
69         action: {
70           displayText: "GO TO PAGE",
71           postback: {
72             data: "test"
73           },
74           urlAction: {
75             openUrl: {
76               url: item.image.contextLink
77             }
78           }
79         }
80       }
81     ]
82   };
83   counter++;
84 });
85
86 return msg;
    
```

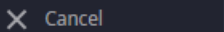

After step **5**

Timeout (sec)

On failure

Reporting

Report field **6**


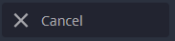
 

Step type: Dynamic message

- Select Step type = *Dynamic message*.
- Select the message type to display the result.

3. Select the language: *JS* (for JavaScript) or *Python*.
4. Paste the script.

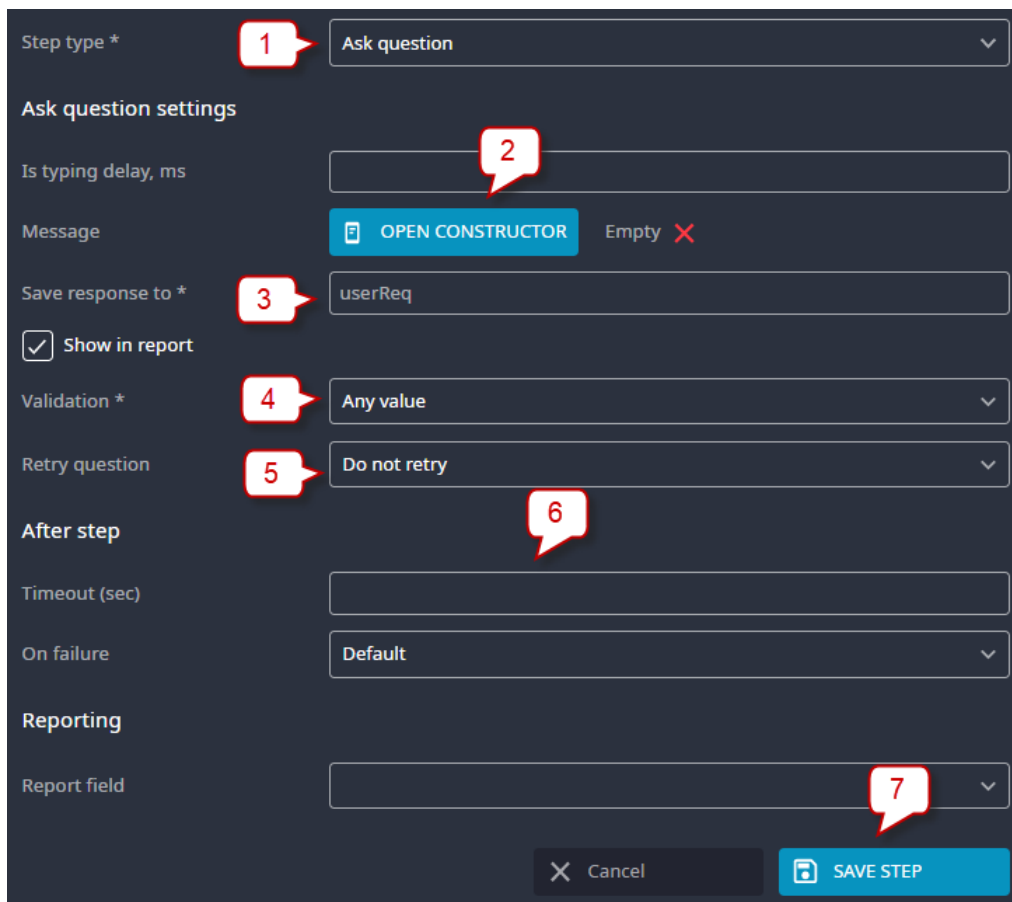
NOTE: If you need help writing the script, contact the technical support team of your System supplier.

5. Configure other parameters as appropriate (see [Add action](#)¹²⁰ for details).
6. Click *Save step* , it will appear on the canvas as illustrated in [Configuring the chatbot in the visual editor](#)¹¹⁹. Click *Cancel*  to discard the settings.

9.2.2.1.4 Step type: Ask question

If *Step type: Ask question* is selected, replies that the recipient gives during the thread will be saved as a variable value (in the *Save response to* field) that can then be used in the thread.

NOTE: After *Ask question* step, use *Condition* step, since *User response* step also implies a response from the user. Thus, the chatbot first waits for the response at *Ask question* step, and then waits for it again when moving on to *User response* step. *Ask question* step also saves user's response to thread variables. Additionally, after *Ask question* step, you should use *Condition* step, setting the transition conditions through thread variables. It will be logically correct and justifies the use of the *Ask question* step. Note that the recommended order of steps is: *Static Message* -> *User response*; *Dynamic Message* -> *User response*; *Ask question* -> *Condition*.




The screenshot shows the configuration interface for the 'Ask question' step. It includes the following fields and callouts:

- 1:** Step type * dropdown menu set to 'Ask question'.
- 2:** Is typing delay, ms input field.
- 3:** Save response to * input field containing 'userReq'.
- 4:** Validation * dropdown menu set to 'Any value'.
- 5:** Retry question dropdown menu set to 'Do not retry'.
- 6:** After step section containing Timeout (sec) and On failure dropdown menus.
- 7:** Reporting section containing Report field dropdown menu.


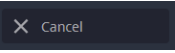
Other visible elements include an 'OPEN CONSTRUCTOR' button, a 'Show in report' checkbox (checked), and 'Cancel' and 'SAVE STEP' buttons at the bottom.

Step type: Ask question

1. Select *Step type* = *Ask question*.

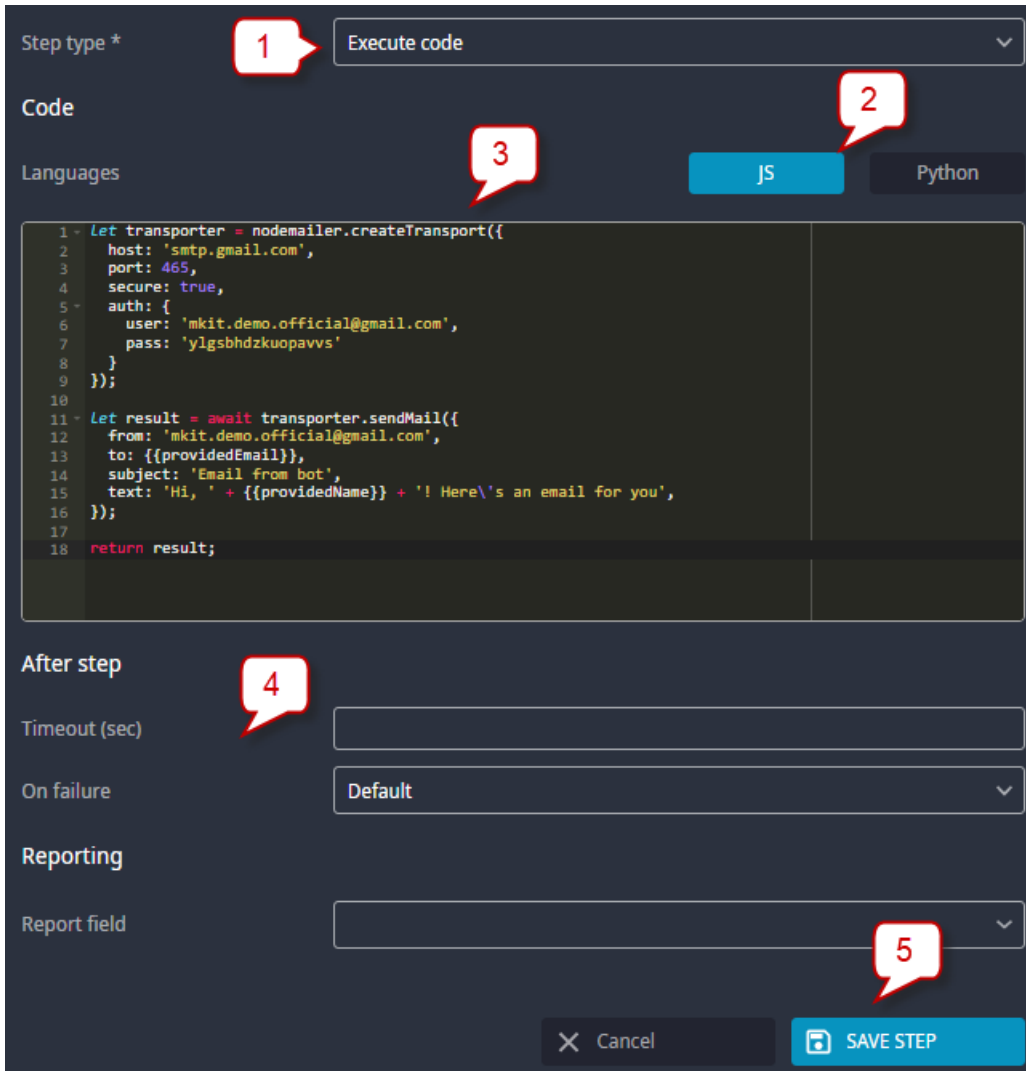
2. Click  to open the Message constructor and create a message according to the channel type chosen for this scenario in [Chatbot settings](#)^[116].
3. *Save response to:* specify the variable employed in the chatbot thread to which the response will be saved. This response can be then used in any step of the chatbot - for example, in message text, conditions or executable code. A variable is an arbitrary alphanumeric symbol or string that will be replaced by the user response wherever it is used in the chatbot. Variables used within a chatbot must be unique. The variable must be entered without the double curly brackets in this field.

NOTE: When the variable is used in message text, conditions or executable code, it must be enclosed in double curly brackets, for example `{{variable_name}}`. The variable can only be used in the current chatbot. Also, if this chatbot implies switching to another one while preserving the current thread, the variable will remain available. To find a variable, select the *Show in report* checkbox and execute the report. See [Reports](#)^[138] for more detail.

- a. *Show in report:* select to include the variables in the reports. This comes instrumental if the user wants to find the variables used in a chatbot.
4. *Validation:* select the value validation type. Possible values include:
 - a. *Email address;*
 - b. *Text only;*
 - c. *Credit card number;*
 - d. *Any value (recommended).*
5. *Retry question:* specify if the question must be repeated in case a response in an incorrect format was given. Possible values are:
 - a. *Do not retry;*
 - b. *Once;*
 - c. *2, 3, 4, or 5 times;*
 - d. *Until filled.*
6. Configure other parameters as appropriate (see [Add action](#)^[120] for details).
7. Click *Save step* , it will appear on the canvas as illustrated in [Configuring the chatbot in the visual editor](#)^[119]. Click *Cancel*  to discard the settings.

9.2.2.1.5 Step type: Execute code

If *Step type: Execute code* is selected, the message gives a command for code execution, for example, place an order in a third-party system. Unlike the Dynamic message type, the result of the execution of the script is not displayed directly in the message.



Step type * 1 Execute code

Code

Languages 3 JS Python 2

```

1- Let transporter = nodemailer.createTransport({
2-   host: 'smtp.gmail.com',
3-   port: 465,
4-   secure: true,
5-   auth: {
6-     user: 'mkit.demo.official@gmail.com',
7-     pass: 'ylgsbhdzkuopavvs'
8-   }
9- });
10
11- Let result = await transporter.sendMail({
12-   from: 'mkit.demo.official@gmail.com',
13-   to: {{providedEmail}},
14-   subject: 'Email from bot',
15-   text: 'Hi, ' + {{providedName}} + '! Here\'s an email for you',
16- });
17
18- return result;

```

After step

Timeout (sec) 4

On failure Default

Reporting


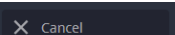
Report field 5

Cancel SAVE STEP

Step type: Execute code

1. Select *Step type* = *Execute code*.
2. Select the language: *JS* (for JavaScript) or *Python*.
3. Paste the script.


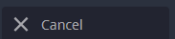
NOTE: If you need help writing the script, contact the technical support team of your System supplier.

4. Configure other parameters as appropriate (see [Add action](#)¹²⁰ for details).
5. Click *Save step* , it will appear on the canvas as illustrated in [Configuring the chatbot in the visual editor](#)¹¹⁹. Click *Cancel*  to discard the settings.

9.2.2.1.6 Step type: Jump to...

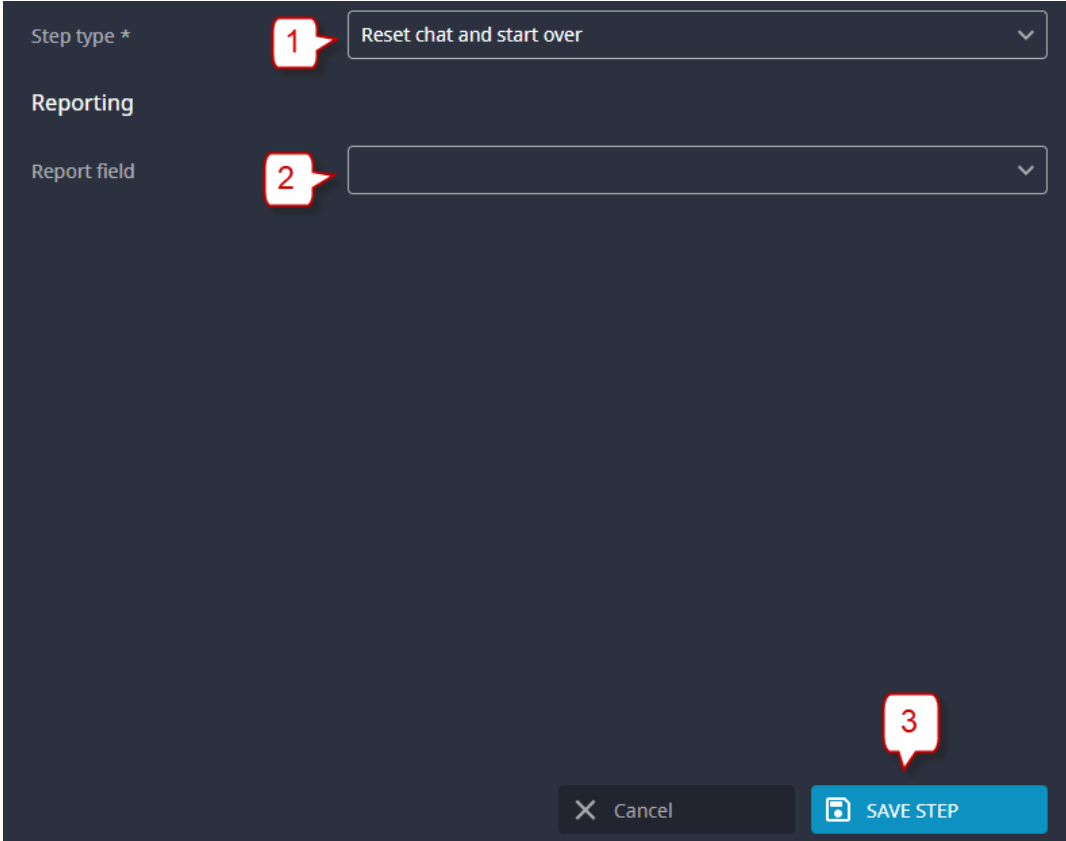
If *Step type: Jump to...* is selected, the user is switched to another chatbot.




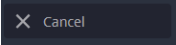
Step type: Jump to...

1. Select *Step type = Jump to...*
2. Select the new chatbot.
3. Select *Pass context* if you want the new chatbot to be executed in the original thread, with all the variable values preserved. When deselected, the current thread will be closed after switching to the new chatbot, and a new thread will be opened; all variable values collected in the previous thread will no longer be available.
4. Configure other parameters as appropriate (see [Add action](#)¹²⁰ for details).
5. Click *Save step* , it will appear on the canvas as illustrated in [Configuring the chatbot in the visual editor](#)¹¹⁹. Click *Cancel*  to discard the settings.

9.2.2.1.7 Step type: Reset chat and start over

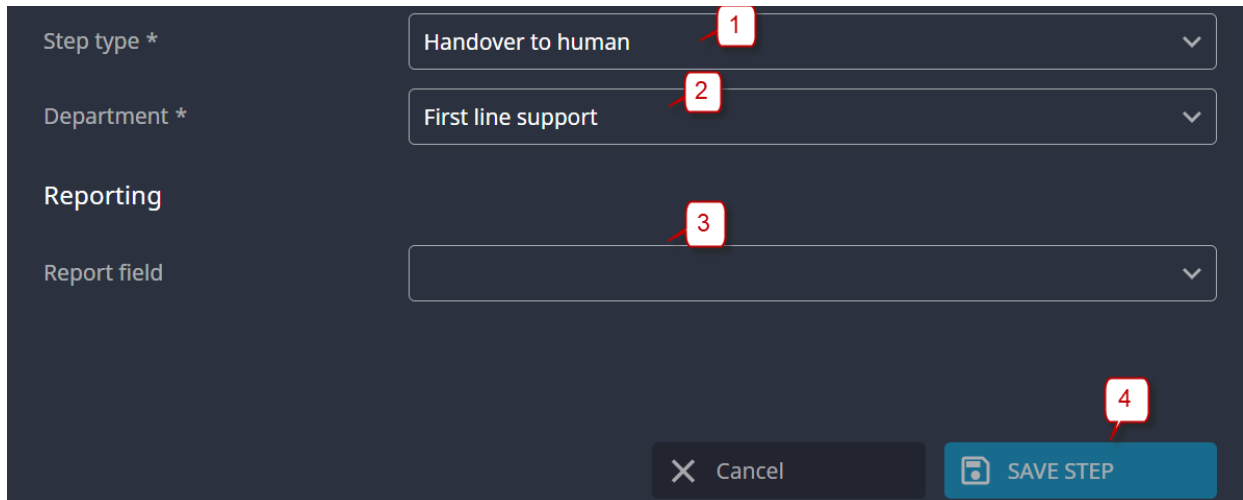
If *Step type: Reset chat and start over* is selected, the chat will start from the beginning.




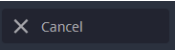
**Step type: Reset chat and start over**

1. Select *Step type* = *Reset chat and start over*.
2. *Report field*: select or create a field to include this step in the report in BackOffice. To create a new field, click on drop-down list. In the edit box that appears, enter the report field name and click  next to it.
3. Click *Save step* , it will appear on the canvas as illustrated in [Configuring the chatbot in the visual editor](#) . Click *Cancel*  to discard the settings.

9.2.2.1.8 Step type: Handover to human

If *Step type: Hand over to human* is selected, the conversation will be taken over by the human operator.


**Step type: Handover to human**

1. Select *Step type = Handover to human*.
2. Select the department that the conversation will be handed over to.
3. *Report field*: select or create a field to include this step in the report in BackOffice. To create a new field, click on drop-down list. In the edit box that appears, enter the report field name and click  next to it.
4. Click *Save step* , it will appear on the canvas as illustrated in [Configuring the chatbot in the visual editor](#) . Click *Cancel*  to discard the settings.

9.2.2.2 Add condition

A condition is a word or phrase the recipient must send in an MO message to start or continue a conversation with the chatbot.

Similar to *Add action*, when you drag and drop the *Add condition* block to the canvas, the editing panel opens.

Set up the condition there. Click  after editing is finished and the action node will appear on the canvas.

Step edit

General

Label 1

Trigger type 2

Type 3

⊕ ADD RESPONSE GROUP

Else





Label

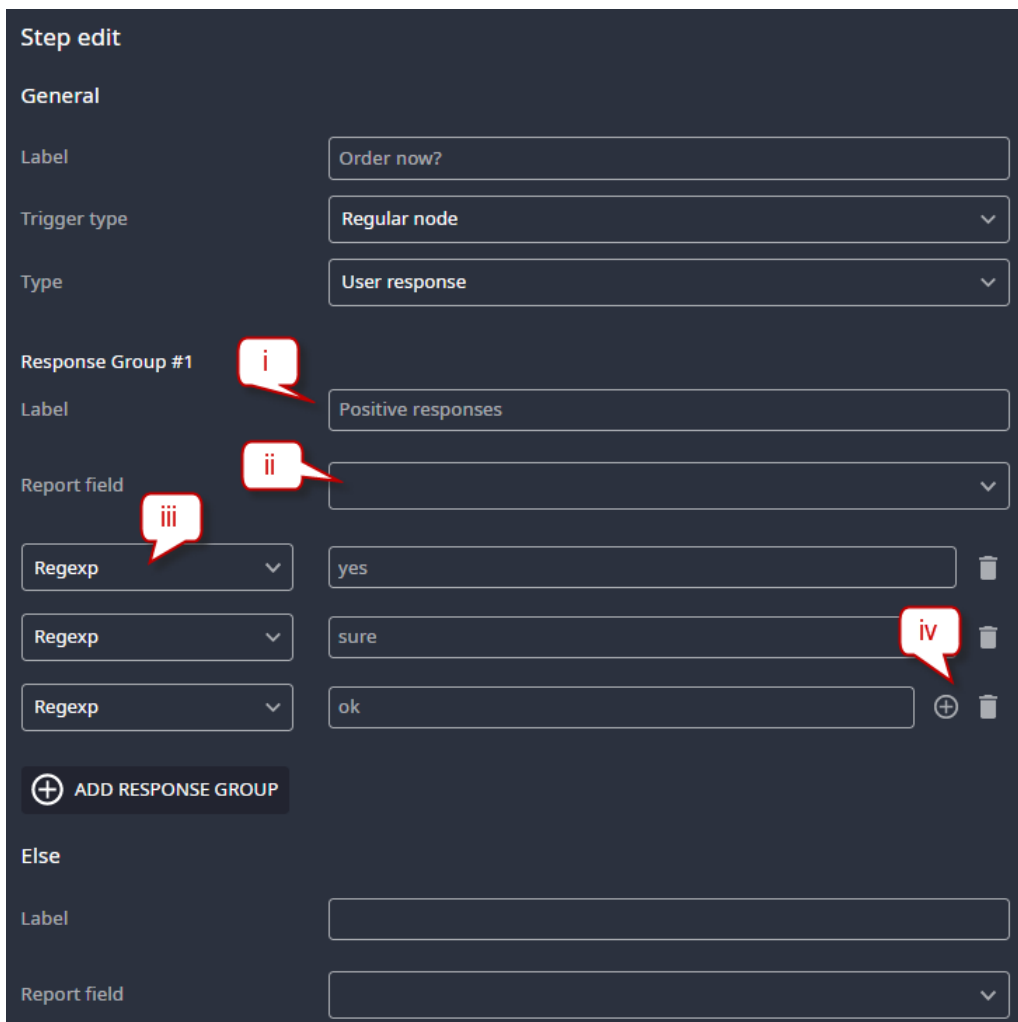
Report field

✕ Cancel
💾 SAVE STEP

Add condition

1. *Label*: step name.
2. *Trigger type*: type of the node. Possible values are:
 - a. *Start node*: the first node in the chatbot scenario. A scenario must ALWAYS start with a start node.
 - b. *Failover node*: the node that will be activated in case of some incorrect situation (for example, failure to deliver a message, code malfunction etc.)
 - c. *Response timeout node*: the node that will be activated in case the recipient's *Response timeout* expires (configured in general chatbot settings, see [Creating a new chatbot](#)^[116]).
 - d. *Stuck timeout node*: the node that will be activated in case the recipient's *Stuck timeout* expires (configured in general chatbot settings, see [Creating a new chatbot](#)^[116]).
 - e. *Opt-out node*: a message that is sent if the recipient sends an opt-out word (configured in the *Opt-out conditions* parameter in general chatbot settings, see [Creating a new chatbot](#)^[116]).

- f. *Regular node*: a regular message from the System.
- 3. *Type*: possible values include:
 - a. *User response*: when set, the node is only executed if the recipient provides predefined responses. Click  **ADD RESPONSE GROUP** to configure all possible responses from the recipient as shown in the figure below (multiple response groups can be added).
 - i. *Label*: add a name of the response group.
 - ii. *Report field*: select or create a field to include the responses in the report in BackOffice. To create a new field, click on drop-down list. In the edit field that appears, enter the report field name and click  next to it.
 - iii. Type a regexp of a possible response in the edit box.
 - iv. Click  to remove a response. Click  to add a new response.



Step edit

General

Label:


Trigger type:


Type:



Response Group #1


Label:

Report field:

Regex: 

Regex: 

Regex:  

 **ADD RESPONSE GROUP**

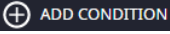
Else


Label:

Report field:

Add response group


- b. *Condition*: when set, the node is only executed if the specified condition is true. If false, the step is not executed and the chatbot scenario moves to the next node. If not set, the node is always executed. A condition is a logical expression that includes variables employed in the chatbot thread (in its messages). All postgres variables can be used. Also, subexpressions can be

grouped in parentheses and combined with the help of the logical AND and OR or NOT. Click  to configure a condition and configure the fields as explained below (multiple response groups can be added):

- i. *Label*: add a name of the condition.
- ii. *Report field*: select or create a field to include the responses in the report in BackOffice. To create a new field, click on drop-down list. In the edit field that appears, enter the report field name and click  next to it.
- iii. *Condition #1*: specify the condition. Example:

`length('{{attribute.name}}' >= 5 or ('{{attribute.city}}' = 'Chicago' and '{{attribute.Country}}' <= 3)`

which means that the condition will resolved as true if the *name* attribute is equal to or longer than 5 symbols, OR the *city* attribute is *Chicago* and the *Country* attribute is equal to or shorter than 3 symbols.

- iv. Click  to remove a condition.

Step edit

General

Label: Order now?

Trigger type: Regular node

Type: Condition

Label: Orders

Report field: [Empty]

Condition #1: length('{{attribute.name}}' >= 5)

+ ADD CONDITION

Else: 4



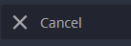
Label: Other answers

Report field: otter|

Cancel SAVE STEP

5

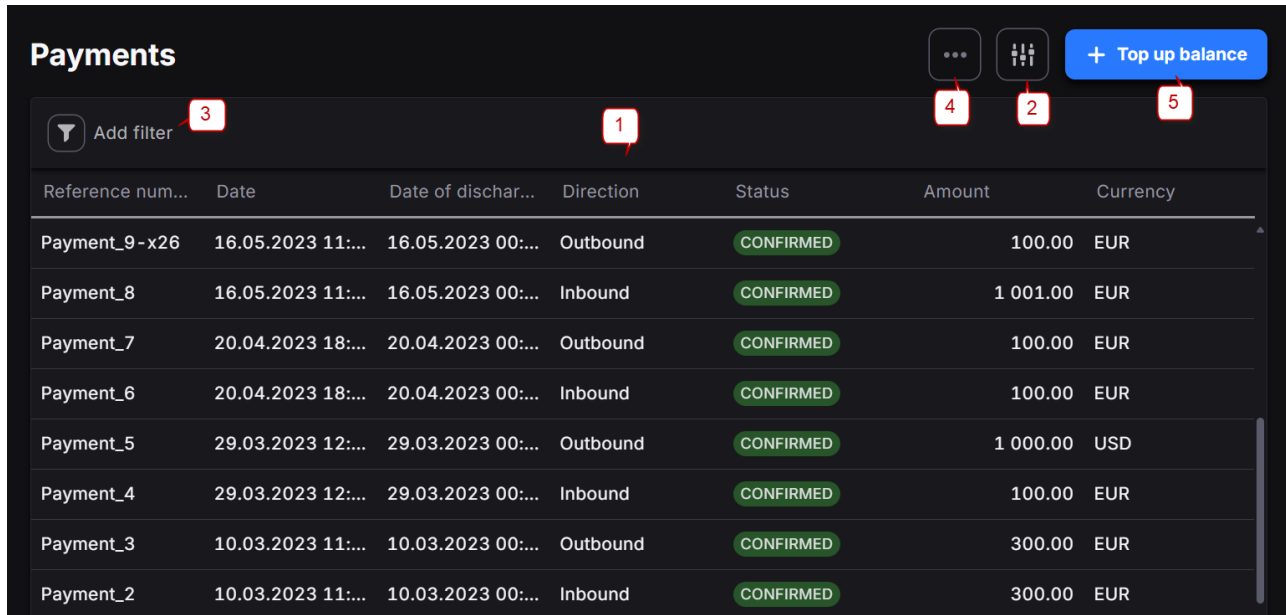
Add condition

4. *Else*: configure the report field to which the System will write all responses that do not match the conditions or responses defined above:
 - a. *Label*: add a collective name for the responses.
 - b. *Report field*: select or create a field to include the responses in the report in BackOffice. To create a new field, click on drop-down list. In the edit field that appears, enter the report field name and click  next to it.
5. Click  to complete. The condition will appear on the canvas. Click *Cancel*  to discard the settings.

10 Finance

10.1 Payments

The *Finance\Payments* interface serves to display payments registered in the System. Payments are either made by the System users through the *Top up balance* button or are added by the administrator through the admin interface (BackOffice).



Payments ... ☰ + Top up balance

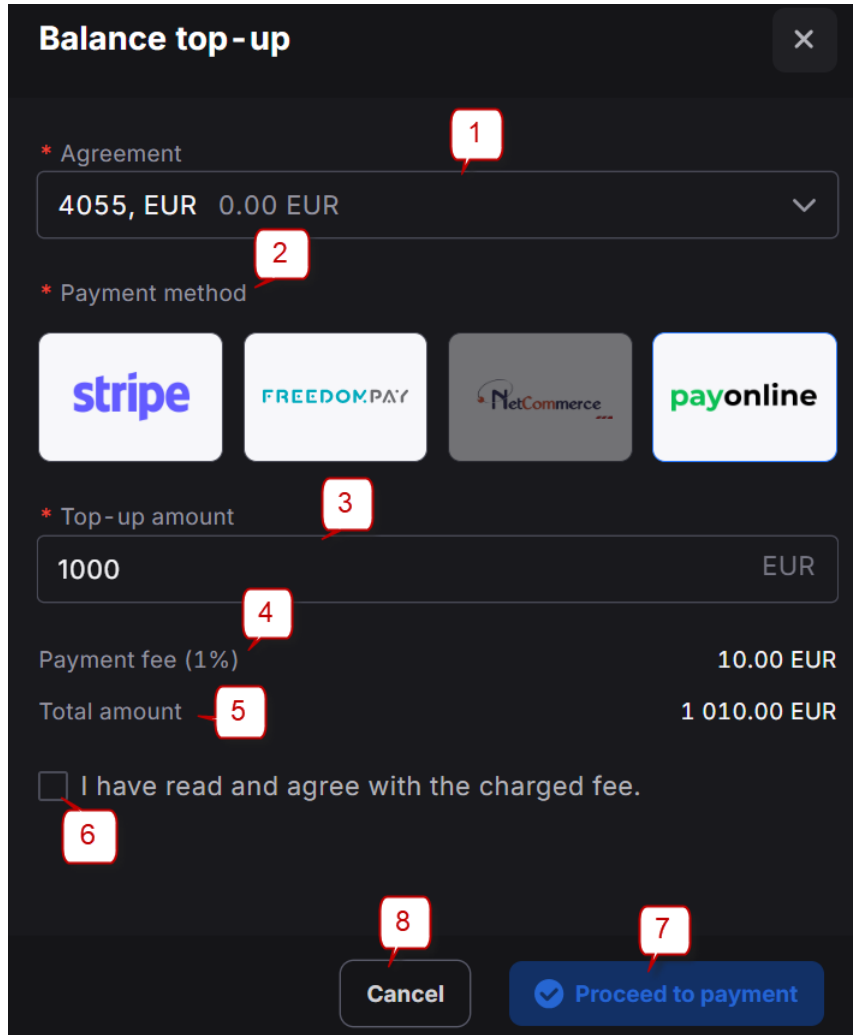
☾ Add filter 1 4 2 5

Reference num...	Date	Date of dischar...	Direction	Status	Amount	Currency
Payment_9-x26	16.05.2023 11:...	16.05.2023 00:...	Outbound	CONFIRMED	100.00	EUR
Payment_8	16.05.2023 11:...	16.05.2023 00:...	Inbound	CONFIRMED	1 001.00	EUR
Payment_7	20.04.2023 18:...	20.04.2023 00:...	Outbound	CONFIRMED	100.00	EUR
Payment_6	20.04.2023 18:...	20.04.2023 00:...	Inbound	CONFIRMED	100.00	EUR
Payment_5	29.03.2023 12:...	29.03.2023 00:...	Outbound	CONFIRMED	1 000.00	USD
Payment_4	29.03.2023 12:...	29.03.2023 00:...	Inbound	CONFIRMED	100.00	EUR
Payment_3	10.03.2023 11:...	10.03.2023 00:...	Outbound	CONFIRMED	300.00	EUR
Payment_2	10.03.2023 11:...	10.03.2023 00:...	Inbound	CONFIRMED	300.00	EUR

Payments

- The table contains the following information:
 - Reference number*: the number of the payment in the System.
 - Date*: the date when the payment was created.
 - Date of discharge*: the date when the payment was discharged.
 - Direction*: *Inbound* or *Outbound*.
 - Status*: payment status. Possible values are:
 - Confirmed*: the payment has been confirmed.
 - Not confirmed*: the payment has not been confirmed.
 - Canceled*: the payment has been canceled.
 - Expired*: the payment has expired.
 - Amount*: payment amount.
 - Currency*: payment currency.
- Click to customize the display of columns.
- Click to add filter.
- Click ☰ to import the payments in CSV or XLSX format.

5. Click *Top up balance* to make a new payment. Fill out the payment form as shown below, specifying agreement, and the sum to top-up, and select the payment platform. You will be redirected to the selected payment platform site. Make a corresponding payment on the payment platform site by any available method. Then you will be redirected back to the Client portal.



Balance top-up [Close]

* Agreement 1
 4055, EUR 0.00 EUR [Dropdown]

* Payment method 2
 stripe FREEDOMPAY NetCommerce payonline

* Top-up amount 3
 1000 EUR

Payment fee (1%) 4 10.00 EUR

Total amount 5 1 010.00 EUR

I have read and agree with the charged fee. 6

8 Cancel 7 Proceed to payment

Balance top-up

1. *Agreement*: select the relevant agreement.
2. *Payment method*: select the payment System (currently *Stripe*, *PayOnline*, *NetCommerce* and *FreedomPay* systems are available).

NOTE: If there are no available payment systems, the following information will be displayed under the control: *There are no available payment systems. Please, contact your platform administrator.*

3. *Top-up amount*: enter the amount in the agreement currency.
4. *Payment fee*: payment system may charge a payment processing fee when topping up the balance. If this is the case then the payment fee amount is displayed in the form.

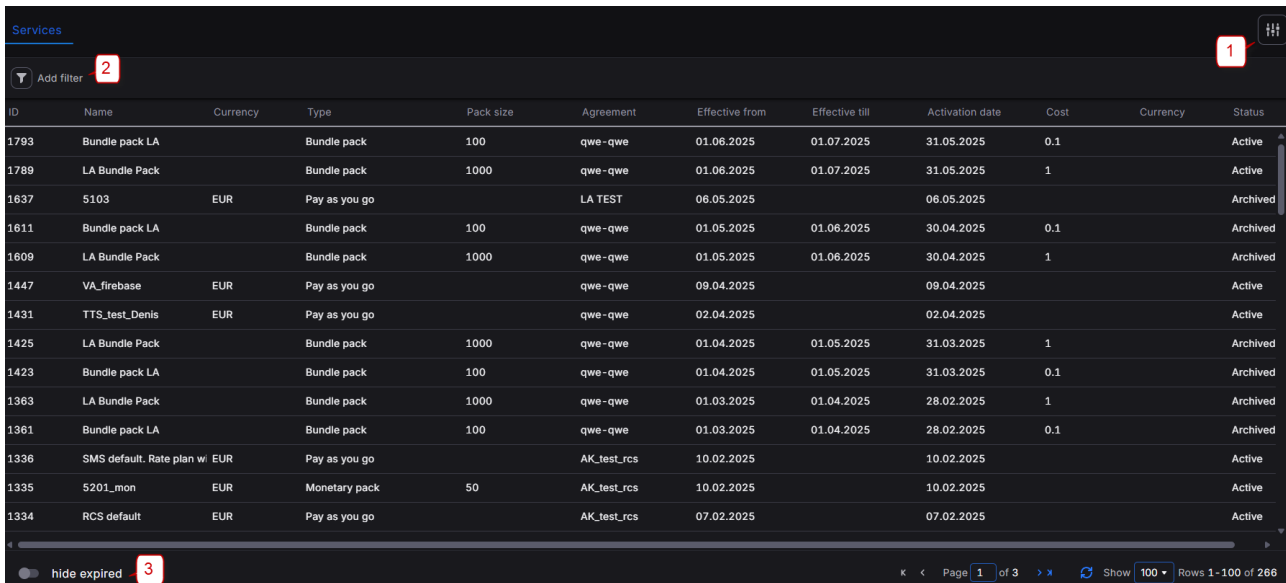
NOTE: If the exact amount of the fee is unknown, the following information will be displayed under the *Top-up amount* control: *Please note the final amount credited to your balance will be less than the initially specified top-up amount due to payment fee.*

5. *Total amount*: top-up amount with payment fee.

6. *I have read and agree with the charged fee*: checkbox to confirm that the user agrees to the fee charged.
7. *Proceed to payment*: click to open the payment system form to complete the operation. After the payment is complete, it appears in the table.
8. *Cancel*: click to discard the settings.

10.2 Services

The *Finance\Services* interface serves to view rate plans offered to clients.

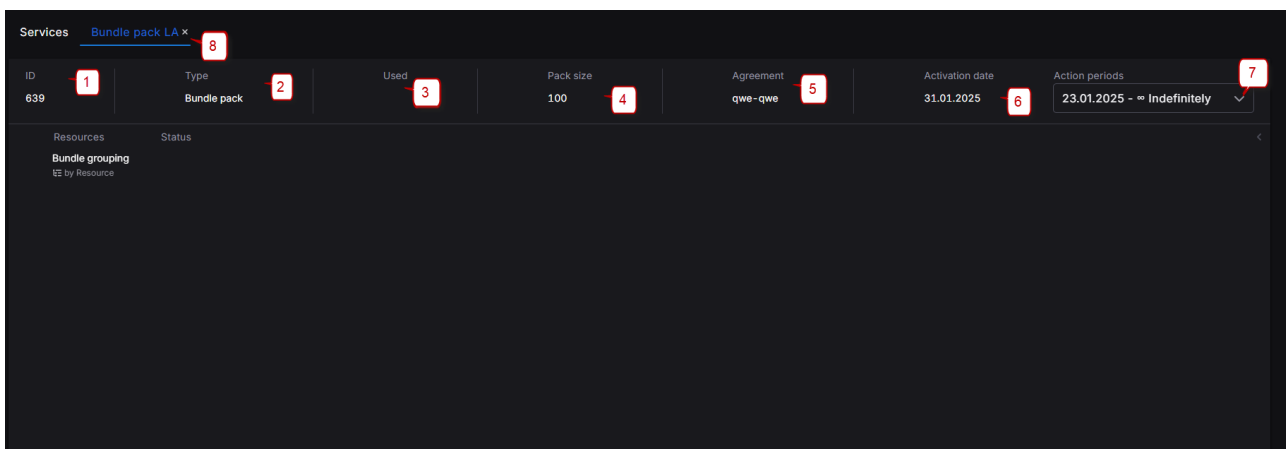


ID	Name	Currency	Type	Pack size	Agreement	Effective from	Effective till	Activation date	Cost	Currency	Status
1793	Bundle pack LA		Bundle pack	100	qwe-qwe	01.06.2025	01.07.2025	31.05.2025	0.1		Active
1789	LA Bundle Pack		Bundle pack	1000	qwe-qwe	01.06.2025	01.07.2025	31.05.2025	1		Active
1837	5103	EUR	Pay as you go		LA TEST	06.05.2025		06.05.2025			Archived
1811	Bundle pack LA		Bundle pack	100	qwe-qwe	01.05.2025	01.06.2025	30.04.2025	0.1		Archived
1609	LA Bundle Pack		Bundle pack	1000	qwe-qwe	01.05.2025	01.06.2025	30.04.2025	1		Archived
1447	VA_firebase	EUR	Pay as you go		qwe-qwe	09.04.2025		09.04.2025			Active
1431	TTS_test_Denis	EUR	Pay as you go		qwe-qwe	02.04.2025		02.04.2025			Active
1425	LA Bundle Pack		Bundle pack	1000	qwe-qwe	01.04.2025	01.05.2025	31.03.2025	1		Archived
1423	Bundle pack LA		Bundle pack	100	qwe-qwe	01.04.2025	01.05.2025	31.03.2025	0.1		Archived
1363	LA Bundle Pack		Bundle pack	1000	qwe-qwe	01.03.2025	01.04.2025	28.02.2025	1		Archived
1361	Bundle pack LA		Bundle pack	100	qwe-qwe	01.03.2025	01.04.2025	28.02.2025	0.1		Archived
1336	SMS default. Rate plan w/	EUR	Pay as you go		AK_test_rcs	10.02.2025		10.02.2025			Active
1335	5201_mon	EUR	Monetary pack	50	AK_test_rcs	10.02.2025		10.02.2025			Active
1334	RCS default	EUR	Pay as you go		AK_test_rcs	07.02.2025		07.02.2025			Active

Services

1. Click to customize the display of columns.
2. Click to add filter.
3. Click *hide expired* to hide services with expired validity periods.

Click on a record to view the service structure. It will open in a separate tab.



ID	Type	Used	Pack size	Agreement	Activation date	Action periods
639	Bundle pack		100	qwe-qwe	31.01.2025	23.01.2025 - ∞ Indefinitely

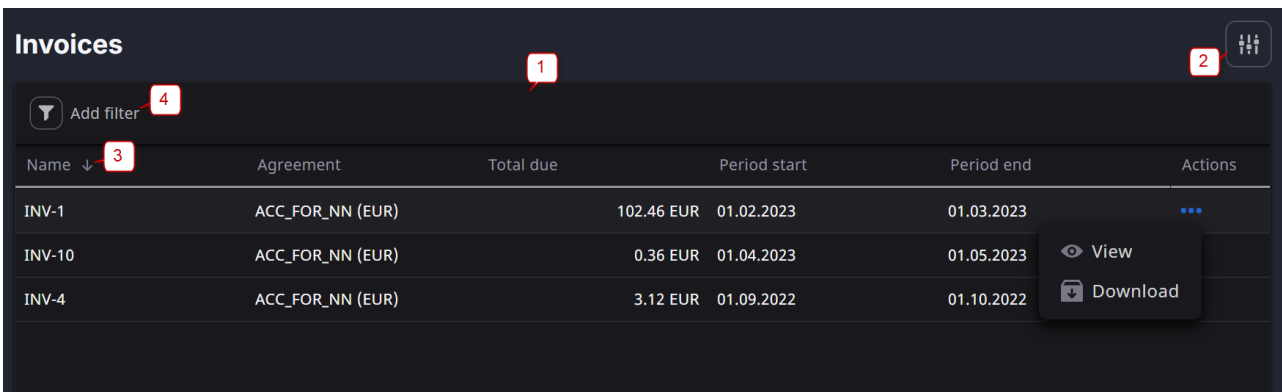
Service structure

1. *ID*: service ID.

2. *Type*: service type.
3. *Used*: bundle pack unit counter that serves to view the used bundle pack units.
4. *Pack size*: total number of units in a pack.
5. *Agreement*: the agreement that the service is associated with.
6. *Activation date*: the date when the service has been activated.
7. *Action periods*: service validity period.
8. Click to close the tab and return to the table of services.

10.3 Invoices

The *Finance\Invoices* interface serves to display all invoices that have been confirmed by an upper-level partner (reseller) and allows the user to track and download all invoices.



Name	Agreement	Total due	Period start	Period end	Actions
INV-1	ACC_FOR_NN (EUR)	102.46 EUR	01.02.2023	01.03.2023	...
INV-10	ACC_FOR_NN (EUR)	0.36 EUR	01.04.2023	01.05.2023	View
INV-4	ACC_FOR_NN (EUR)	3.12 EUR	01.09.2022	01.10.2022	Download

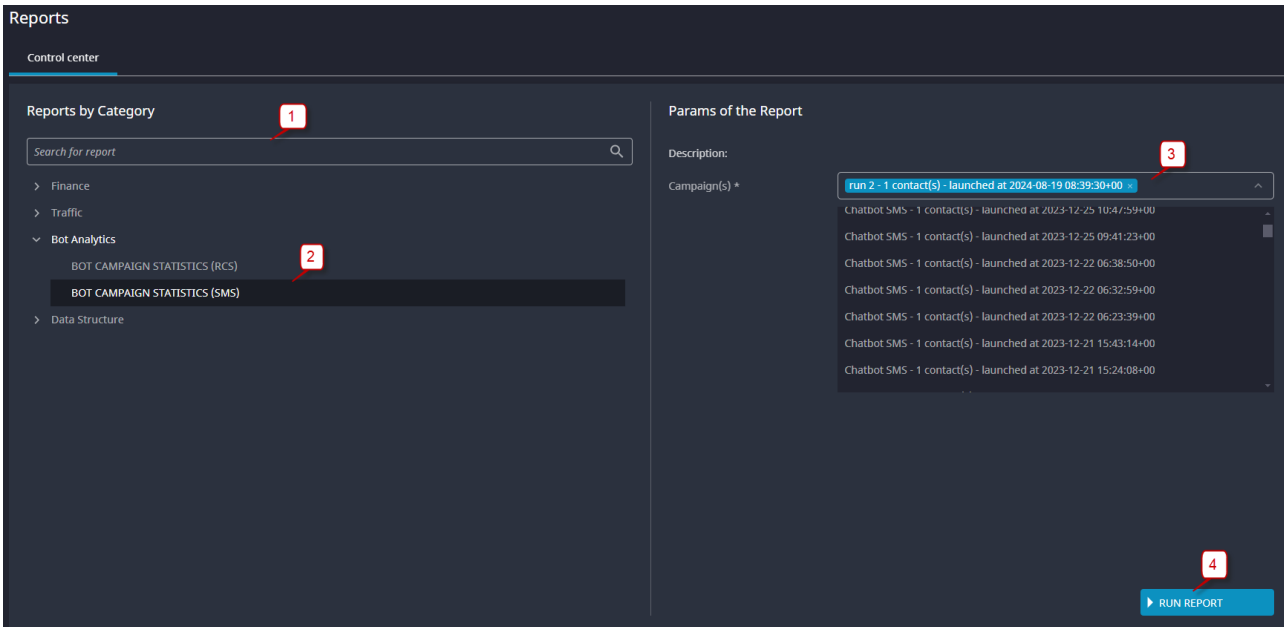
Invoices

1. The table contains the following information:
 - a. *Name*: invoice identifier.
 - b. *Agreement*: name of the agreement that is associated with the invoice.
 - c. *Total due*: total amount of the charge in the specific currency.
 - d. *Period start*: the start date of the invoice generation period in the agreement timezone.
 - e. *Period end*: the end date of the invoice generation period in the agreement timezone.
 - f. *Issue date* (hidden by default): the date of the invoice receipt in the agreement timezone.
 - g. *Due date* (hidden by default): the date when the invoice falls due in the agreement timezone.
 - h. *Actions*:
 - *View*: click to display the invoice in a new browser tab and download it in pdf if necessary.
 - *Download*: click to download the archive with invoice and charges in .zip format.
2. Click to customize the display of columns.
3. Click to apply sorting (ascending or descending).
4. Click to add filter.

11 Statistics

11.1 Reports

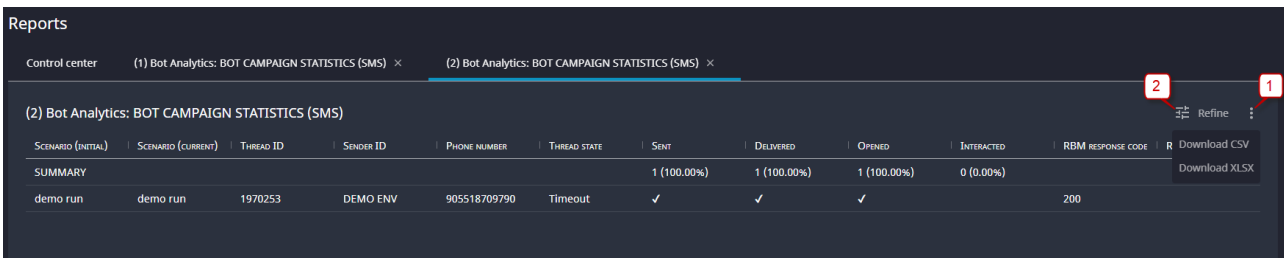
The *Statistics\Reports* interface enables running reports on the main System functions and data. The report templates are configured by the System owner. The interface displays the following elements and controls.



Reports interface

1. Use the edit box to search for a report.
2. View the available report categories and reports. Click **>** to unfold the list of reports available in the category. Select the report that you wish to run.
3. View the report description and set the report parameter values.
4. Click *Run report* to execute the report with the parameters specified in (3).

The report will open in a separate tab as illustrated below.

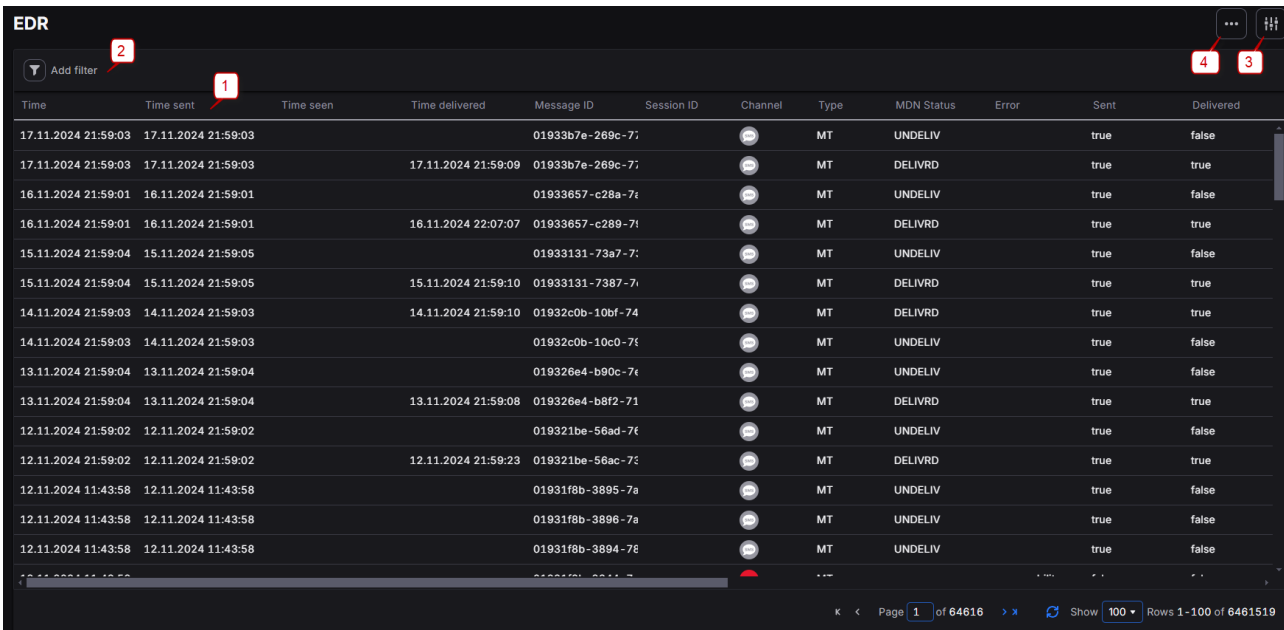


Report

1. Click **⋮** to export the report in a CSV or XLSX file.
2. Click *Refine* to return to the *Control center* tab, update the report parameter values and run the report again.





11.2 EDRs

The *Statistics\EDRs* interface allows viewing and exporting EDRs.

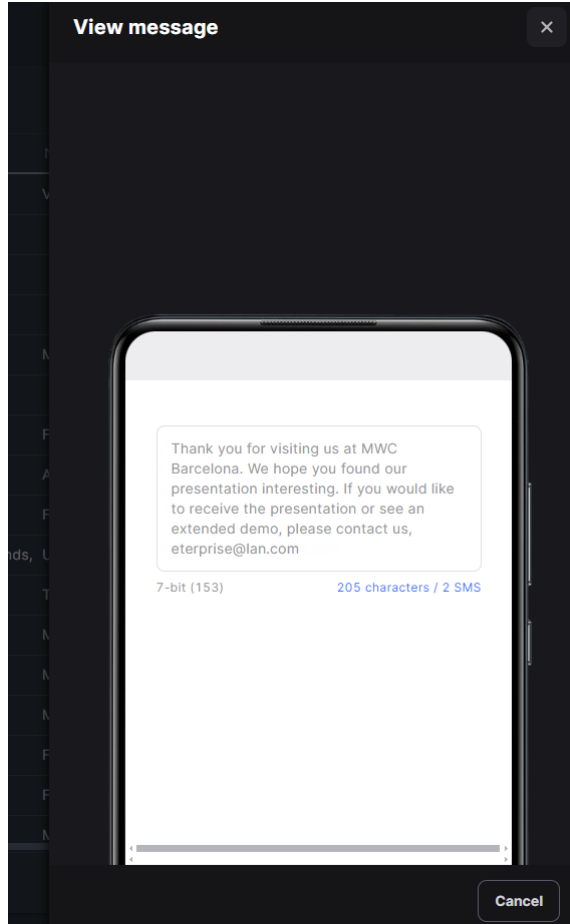


Time	Time sent	Time seen	Time delivered	Message ID	Session ID	Channel	Type	MDN Status	Error	Sent	Delivered
17.11.2024 21:59:03	17.11.2024 21:59:03			01933b7e-269c-7f			MT	UNDELIV		true	false
17.11.2024 21:59:03	17.11.2024 21:59:03		17.11.2024 21:59:09	01933b7e-269c-7f			MT	DELIVRD		true	true
16.11.2024 21:59:01	16.11.2024 21:59:01			01933857-c28a-7f			MT	UNDELIV		true	false
16.11.2024 21:59:01	16.11.2024 21:59:01		16.11.2024 22:07:07	01933857-c289-7f			MT	DELIVRD		true	true
15.11.2024 21:59:04	15.11.2024 21:59:05			01933131-73a7-7f			MT	UNDELIV		true	false
15.11.2024 21:59:04	15.11.2024 21:59:05		15.11.2024 21:59:10	01933131-7387-7f			MT	DELIVRD		true	true
14.11.2024 21:59:03	14.11.2024 21:59:03		14.11.2024 21:59:10	01932c0b-10bf-7a			MT	DELIVRD		true	true
14.11.2024 21:59:03	14.11.2024 21:59:03			01932c0b-10c0-7f			MT	UNDELIV		true	false
13.11.2024 21:59:04	13.11.2024 21:59:04			019326e4-b90c-7f			MT	UNDELIV		true	false
13.11.2024 21:59:04	13.11.2024 21:59:04		13.11.2024 21:59:08	019326e4-b8f2-7f			MT	DELIVRD		true	true
12.11.2024 21:59:02	12.11.2024 21:59:02			019321be-56ad-7f			MT	UNDELIV		true	false
12.11.2024 21:59:02	12.11.2024 21:59:02		12.11.2024 21:59:23	019321be-56ac-7f			MT	DELIVRD		true	true
12.11.2024 11:43:58	12.11.2024 11:43:58			01931f8b-3895-7a			MT	UNDELIV		true	false
12.11.2024 11:43:58	12.11.2024 11:43:58			01931f8b-3896-7a			MT	UNDELIV		true	false
12.11.2024 11:43:58	12.11.2024 11:43:58			01931f8b-3894-7f			MT	UNDELIV		true	false

EDRs

1. Each column in the table is an EDR field.
2. Click *Add filter*  to open the filtering panel and select the criteria. Click  to filter the column values.
3. Click  to customize the display of columns.
4. Click  to import the EDRs in CSV or XLSX format.

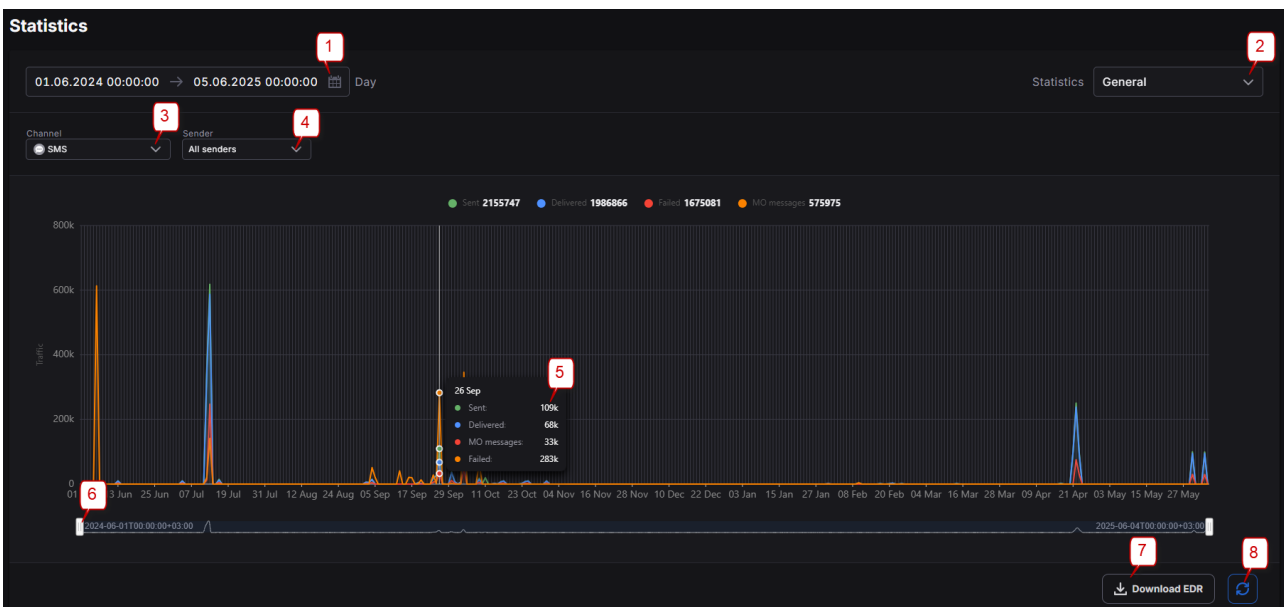
Click *Show constructor* in the *Constructor* column to view the message as illustrated below.




View message

11.3 Statistics

The *Statistics\Statistics* interface allows viewing details on messages in user-friendly charts. All statistics are based on EDRs.



Statistics

1. Select the period for which the statistics must be displayed.
2. *Statistics*: select the data type that must be shown. Possible values are:
 - a. *General*: show all data.
 - b. *By operator*: sent and delivered messages by operator.
 - c. *By country*: sent and delivered messages by country.
3. *Channel*: select the communication channel.
4. *Sender*: select *All senders* or the Sender ID.
5. Hover over the chart to display the stats for the specific date.
6. Use the slider to zoom in on a shorter time-frame within the period set in step 1.
7. Click *Download EDR* to download the EDR for the specified period.
8. Click  to refresh the chart.

12 Assets

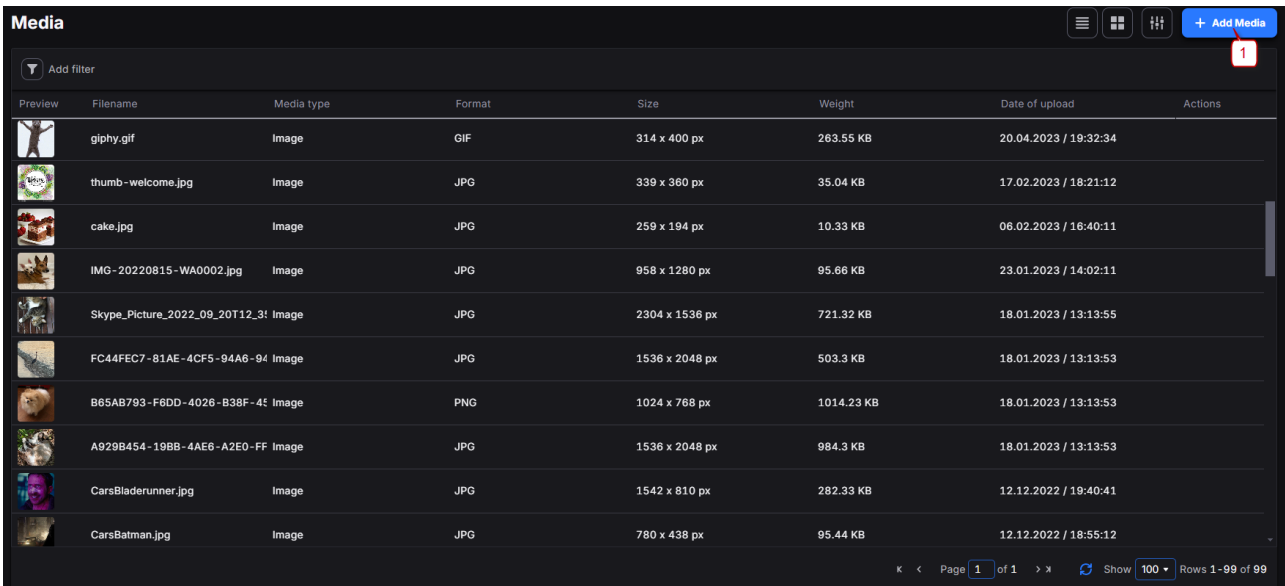
The Assets section contains the following subsections:

- *Media*: serves to manage all media files (images, video, documents etc.) uploaded to the System.
- *Sender IDs*: contains a table with Sender IDs for all channels, which are used in broadcasts and scenarios. It also allows submitting Sender IDs for registration in BackOffice.
- *Content templates*: serves to create and store message templates for the *SMS*, *RCS*, *Viber*, *WhatsApp*, *Email*, *Push*, *TTS* and *Mobile Push* channels.
- *WhatsApp templates*: serves to create and store message templates for the WhatsApp channel.
- *Conversations templates*: serves to create and store message templates for Conversations.

12.1 Media

The *Media* subsection serves to manage all media files (images, video, documents etc.) uploaded to the System. Media content added from the user's device can be used in broadcasts and for chatbot scenarios. Media files (pictures, gif, video, audio or documents) can be in any media or document format (max. 500 MB).

To add new media proceed as illustrated in the figures below.

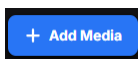


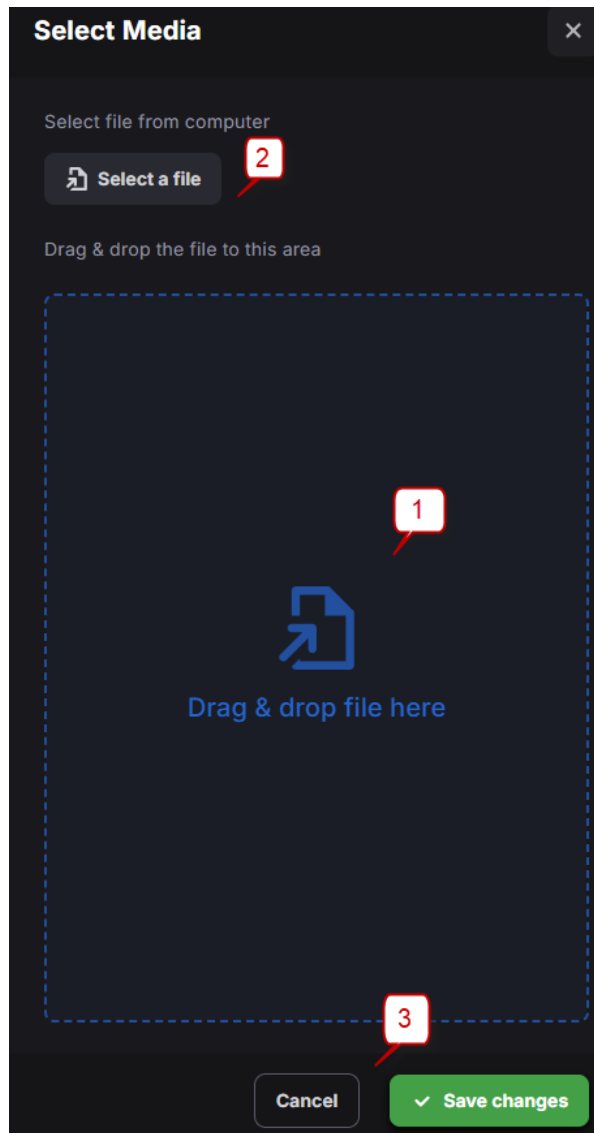
The screenshot shows the 'Media' section of the system. At the top right, there is a '+ Add Media' button with a red notification badge '1'. Below the header, there is a table with the following columns: Preview, Filename, Media type, Format, Size, Weight, Date of upload, and Actions. The table contains 10 rows of media files, all of which are images. The bottom of the interface shows pagination controls: 'Page 1 of 1', 'Show 100', and 'Rows 1-99 of 99'.

Preview	Filename	Media type	Format	Size	Weight	Date of upload	Actions
	giphy.gif	Image	GIF	314 x 400 px	263.55 KB	20.04.2023 / 19:32:34	
	thumb-welcome.jpg	Image	JPG	339 x 360 px	35.04 KB	17.02.2023 / 18:21:12	
	cake.jpg	Image	JPG	259 x 194 px	10.33 KB	06.02.2023 / 16:40:11	
	IMG-20220815-WA0002.jpg	Image	JPG	958 x 1280 px	95.66 KB	23.01.2023 / 14:02:11	
	Skype_Picture_2022_09_20T12_3! Image	Image	JPG	2304 x 1536 px	721.32 KB	18.01.2023 / 13:13:55	
	FC44FEC7-81AE-4CF5-94A6-94 Image	Image	JPG	1536 x 2048 px	503.3 KB	18.01.2023 / 13:13:53	
	B65AB793-F6DD-4026-B38F-4 Image	Image	PNG	1024 x 768 px	1014.23 KB	18.01.2023 / 13:13:53	
	A929B454-19BB-4AE6-A2E0-FF Image	Image	JPG	1536 x 2048 px	984.3 KB	18.01.2023 / 13:13:53	
	CarsBladerunner.jpg	Image	JPG	1542 x 810 px	282.33 KB	12.12.2022 / 19:40:41	
	CarsBatman.jpg	Image	JPG	780 x 438 px	95.44 KB	12.12.2022 / 18:55:12	

Adding new media

1. Click *Add Media*





Adding files from a device

Add files from your device as illustrated in the figure above:

1. Drag and drop the selected files from the device gallery.
2. OR click *Select a file* on the right panel.
3. Click *Save changes* to save media or *Cancel* to discard the changes.

The figure below explains management of media files in table view.




Media ☰ ☰ ☰ + Add Media

☿ Add filter 1

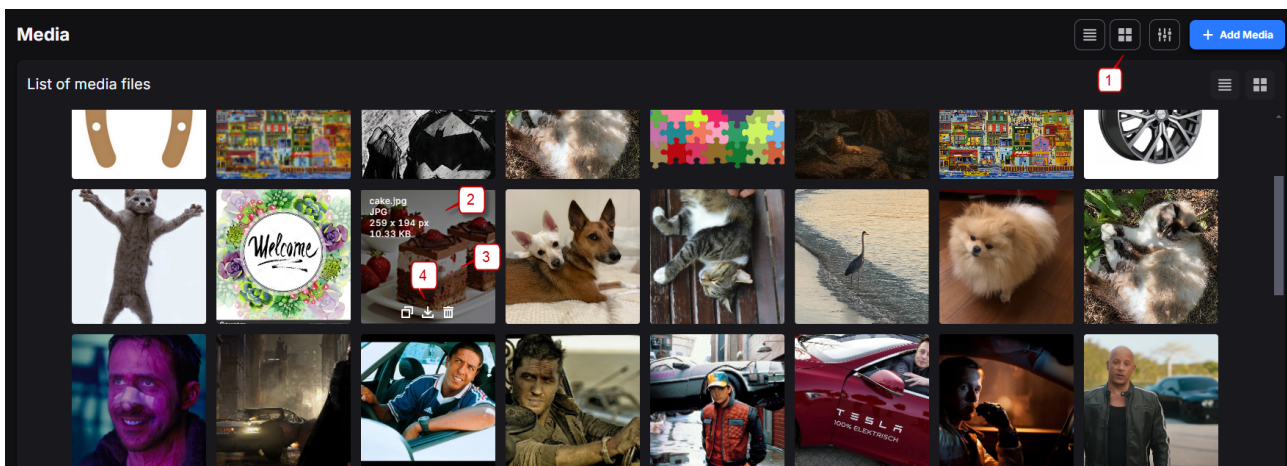
Preview	Filename	Media type	Format	Size	Weight	Date of upload	Actions
	CarsDrive.jpg	Image	JPG	1082 x 720 px	69.95 KB	12.12.2022 / 18:55:10	
	CarsDiesel.jpg	Image	JPG	1280 x 720 px	480.22 KB	12.12.2022 / 18:55:10	
	CarsBond.jpg	Image	JPG	1200 x 900 px	81.23 KB	12.12.2022 / 18:55:10	
	7days.jpg	Image	JPG	1280 x 720 px	61.78 KB	12.12.2022 / 11:39:03	
	ringBoromir.jpg	Image	JPG	980 x 404 px	52.23 KB	06.12.2022 / 16:46:20	☐ ⬇️ 🗑️
	glassesMib.jpg	Image	JPG	2560 x 1368 px	322.96 KB	06.12.2022 / 16:46:20	
	glassesMorpheus.jpg	Image	JPG	1400 x 1050 px	127.57 KB	06.12.2022 / 16:46:20	
	glassesPotter.jpg	Image	JPG	640 x 359 px	23.34 KB	06.12.2022 / 16:46:19	
	glassesProfessor.jpg	Image	JPG	1422 x 750 px	260.29 KB	06.12.2022 / 16:46:19	
	glassesVegas.jpeg	Image	JPG	1920 x 1080 px	317.41 KB	06.12.2022 / 16:46:19	

⏪ < Page 1 of 1 > ⏩ Show 100 Rows 1-99 of 99

Media management, table view

1. Switch between the table view and card view modes when necessary.
2. Click to add filter.
3. In the table view mode, hover on the row to select a media file from the media table.
4. Click the media for bigger view (applicable only to images and GIFs).
5. Click  to copy a media; click  to download a file to your device; click  if you want to delete media from the System.

The figure below explains management of media files in card view.



Card view

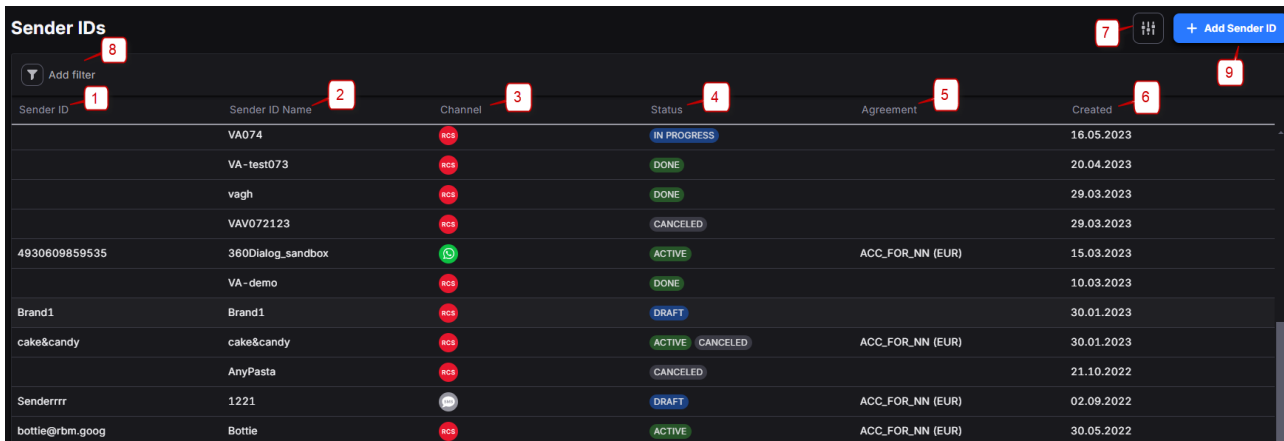
1. Switch to the card view mode.
2. Hover on the row to select a media file.
3. Click the media for bigger view (applicable only to images and GIFs).

4. Click  to copy a media; click  to download a file to your device; click  if you want to delete media from the System.

12.2 Sender IDs

The *Assets\Sender IDs* subsection serves to view, edit and register Sender IDs. Sender IDs are alphanumeric identifiers on behalf of which System users send their messages in broadcasts and conversations. Currently the interface allows registering only SMS and RCS Sender IDs. Sender IDs for other channels (*Viber, WhatsApp, WeChat, Email, Telegram Gateway, Push, TTS, Voice and Mobile Push*) are registered in BackOffice (contact the System owner for registration).

The *Sender IDs* page contains a table with Sender IDs for all channels.





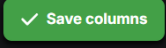

Sender ID	Sender ID Name	Channel	Status	Agreement	Created
VA074		RCS	IN PROGRESS		16.05.2023
VA-test073		RCS	DONE		20.04.2023
vagh		RCS	DONE		29.03.2023
VAV072123		RCS	CANCELED		29.03.2023
4930609859535	360Dialog_sandbox	RCS	ACTIVE	ACC_FOR_NN (EUR)	15.03.2023
	VA-demo	RCS	DONE		10.03.2023
Brand1	Brand1	RCS	DRAFT		30.01.2023
cake&candy	cake&candy	RCS	ACTIVE CANCELED	ACC_FOR_NN (EUR)	30.01.2023
	AnyPasta	RCS	CANCELED		21.10.2022
Senderrrr	1221	RCS	DRAFT	ACC_FOR_NN (EUR)	02.09.2022
botttie@rbm.goog	Bottle	RCS	ACTIVE	ACC_FOR_NN (EUR)	30.05.2022

Sender ID table

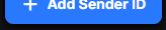
The table contains the following information:

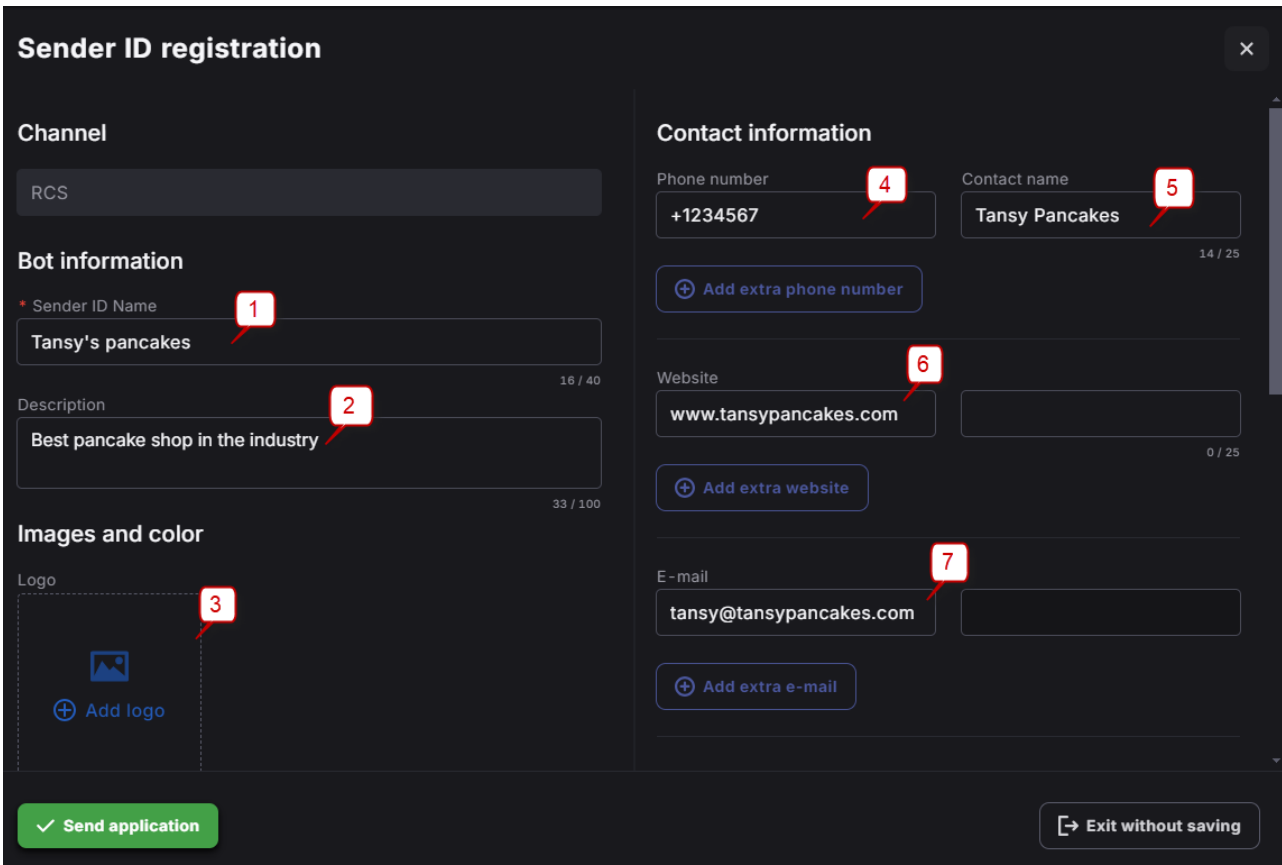
1. *Sender ID*: the alphanumeric sender identifier (assigned automatically by the telecom operator).
2. *Sender ID name*: the sender name displayed in messages.
3. *Channel*: the channel for which the Sender ID is used.
4. *Status*: the Sender ID status. Possible values are:
 - a. *Active*: the Sender ID is successfully registered and is fully operative.
 - b. *In progress*: the registration request is being processed in the BackOffice.
 - c. *Submitted*: the registration request has been submitted.
 - d. *Draft*: the Sender ID is saved as draft.
 - e. *Canceled*: the Sender ID has been canceled by the System owner.
 - f. *Testing*: the Sender ID is being tested by the System owner.
 - g. *Blocked*: the Sender ID has been blocked by the System owner.
 - h. *Done*: the registration request has been processed by the System owner.
 - i. *Rejected*: the registration request has been rejected by the System owner.
5. *Agreement*: the Sender ID agreement.
6. *Created*: date when the registration request is created.

7. Click  to open the *Columns to show* tab and customize the display of columns. Type the name of the column in the search bar or select the column you want to display from the list and click *Cancel*

 to discard the changes or *Save columns*  to save them. Click  to close the tab.

8. Click to add filter.

To create a new registration request, click  ((9) in the figure above) and select a channel (*SMS* or *RCS*).



Sender ID registration


Channel
RCS

Bot information

* Sender ID Name **1**
Tansy's pancakes 16 / 40

Description **2**
Best pancake shop in the industry 33 / 100

Images and color

Logo **3**



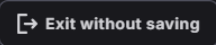
Contact information

Phone number **4**
+1234567 14 / 25

Contact name **5**
Tansy Pancakes

Website **6**
www.tansypancakes.com 0 / 25

E-mail **7**
tansy@tansypancakes.com

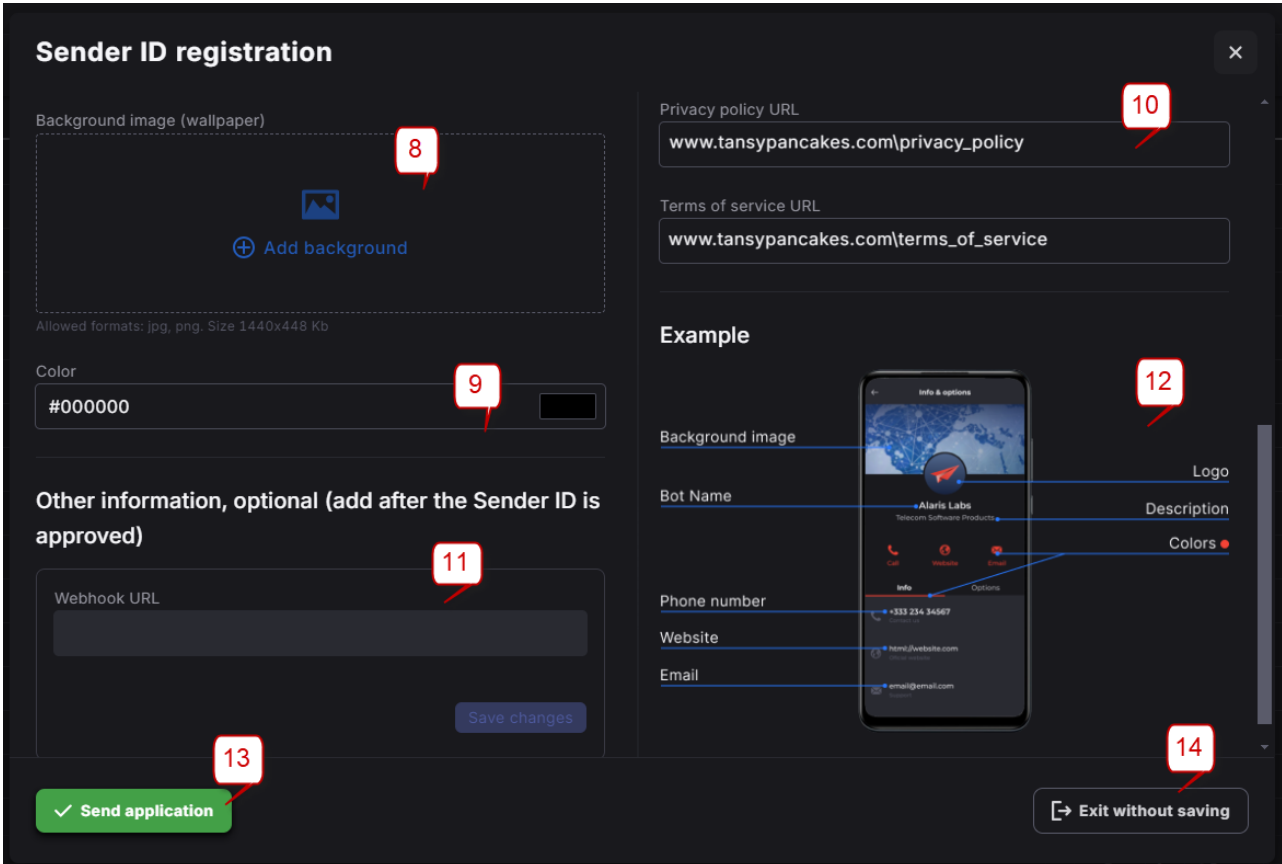
Buttons:
 

Sender ID registration form

Configure the following details:

1. Enter the Sender ID name as will be seen by recipients (the actual Sender ID will be assigned automatically by the telecom operator).
2. Add a description that will be shown in the Sender ID profile under its name (see the figure below for an example).
3. Click to add a profile picture or logo (the allowed formats are: jpg, png, and size 240x240 90 Kb)
4. Add a phone number and button text (max 2 numbers are allowed - click *Add extra phone number* to add another one).
5. Supply the contact name.

6. Add a website address and button text (max 2 website addresses are allowed - click *Add extra website* to add another one).
7. Provide an email address and button text (max 2 email addresses are allowed - click *Add extra e-mail* to add another one).



Sender ID registration

Background image (wallpaper) 8

Allowed formats: jpg, png. Size 1440x448 Kb

Color 9

#000000

Other information, optional (add after the Sender ID is approved) 11

Webhook URL

Save changes

Privacy policy URL 10

www.tansypancakes.com/privacy_policy

Terms of service URL

www.tansypancakes.com/terms_of_service

Example 12

Background image

Bot Name

Phone number

Website

Email

Logo

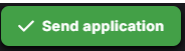
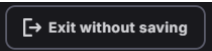
Description

Colors

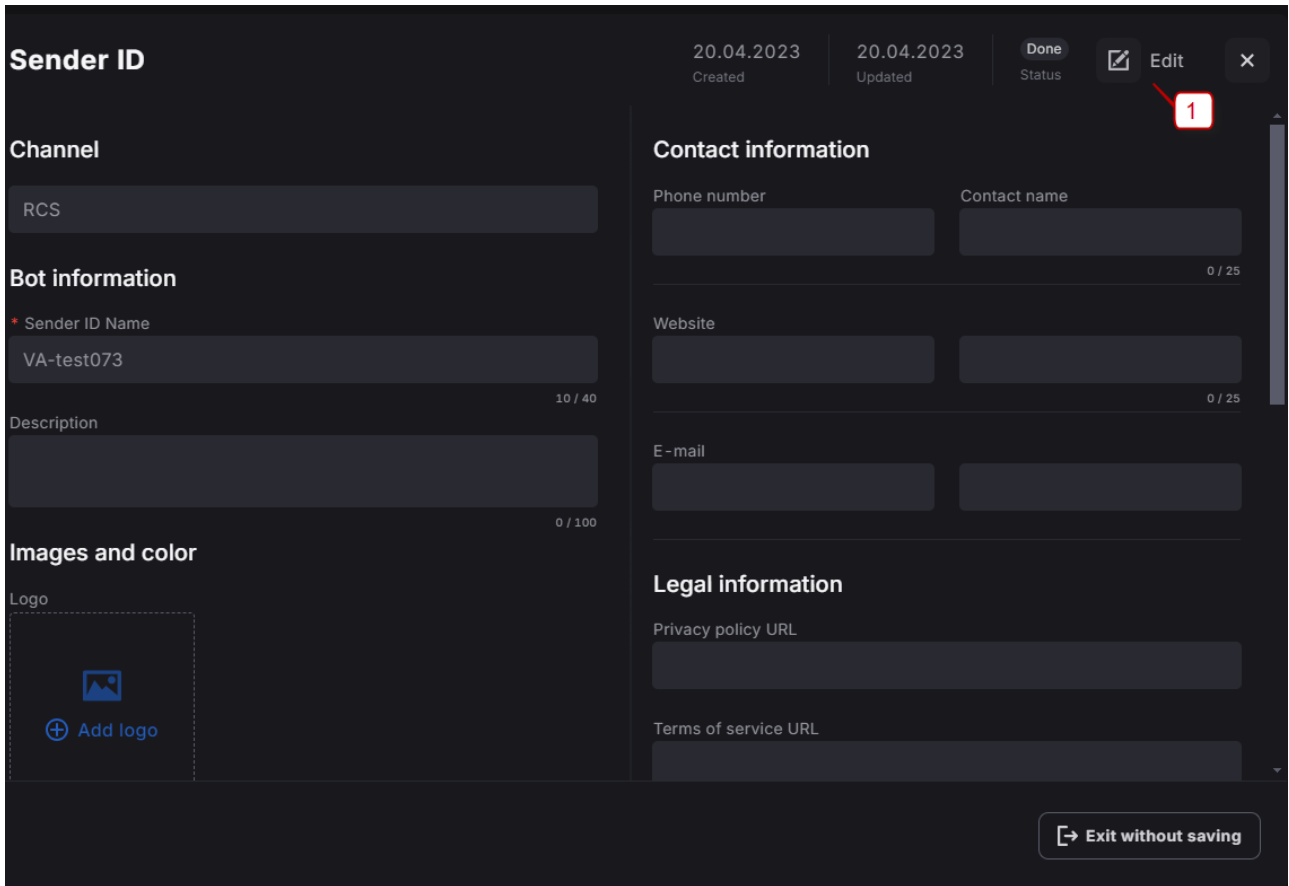
Send application 13

Exit without saving 14

Sender ID registration form (continued)

8. Click to add a background image (the allowed formats are: jpg, png, and size 1440x448 120 Kb).
9. Select the profile color (if not selected, the black color will be used by default).
10. Specify the link to the company's privacy policy and terms of service.
11. Provide additional information if necessary (after the Sender ID is approved):
 - *Webhook URL*: a URL for sending user responses to a third-party system.
12. View how the parameters filled in this form are displayed on a recipient device.
13. Click  to submit the application.
14. Click  to discard the settings and close the form.

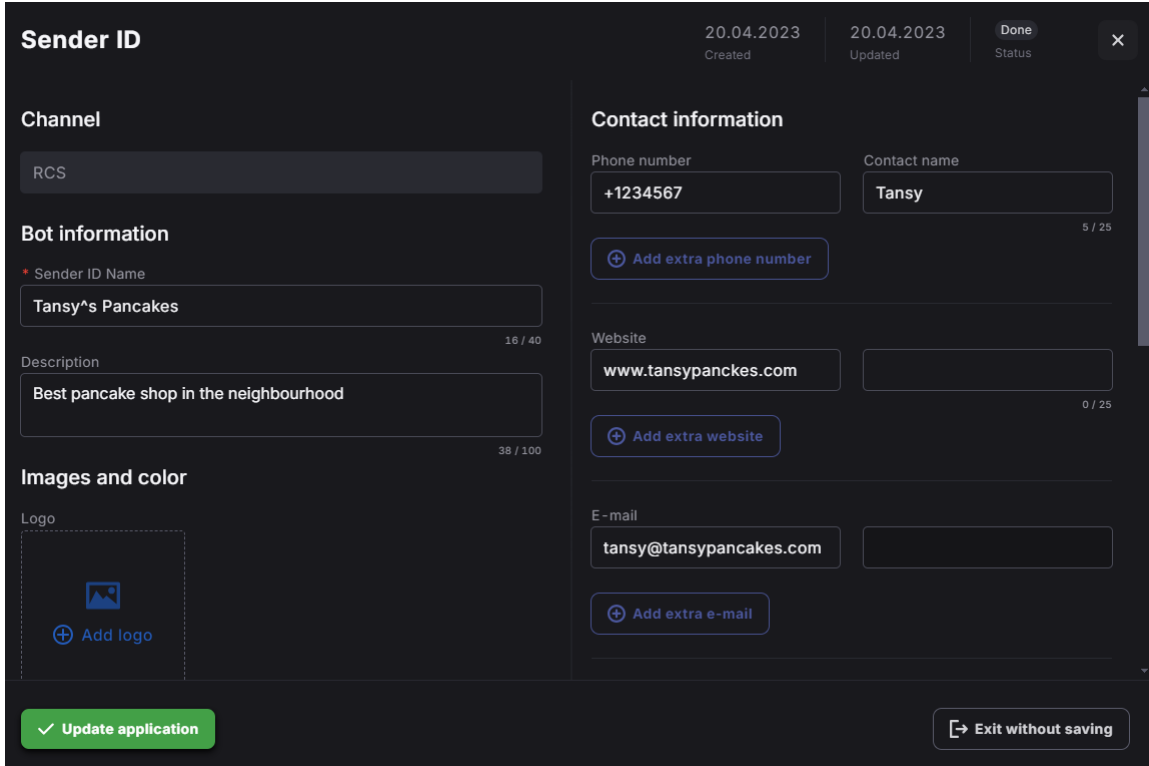
Once the user has submitted the application, it appears in the table with the *Submitted* status. Click on a record to view it.



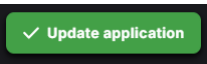
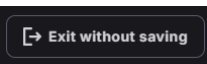
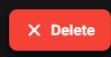
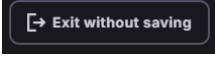
Viewing a Sender ID registration form

1. Click  Edit to edit the form.

NOTE: Only applications with the *Submitted*, *Done* or *Active* status can be edited.




Editing a Sender ID registration form

Edit the parameters and click . Click  to cancel the registration request. In this case, the  button becomes available that allows removing the record from the System. Click  to close the form. The application status will be changed to *Canceled*.



12.3 Content templates

The *Assets\Content templates* subsection serves to create and store message templates for the *SMS*, *RCS*, *Viber*, *WhatsApp*, *Email*, *Push*, *TTS* and *Mobile Push* channels. Content templates can also be configured in [Broadcasts\Message content editor](#)^[35] and [Conversations\Chatbots](#)^[114] interfaces. All of them are stored in *Assets\Content templates*.

The *Templates* page contains a table of message templates for *SMS*, *RCS*, *Viber*, *WhatsApp*, *Email*, *Push*, *TTS* and *Mobile PushEmail* channels.

Content templates 5  [+ New Template](#)



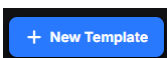
1 7 2 3 4 8

ID	Template Name	Channel	Last Modified	Actions
78	campaign autumn22	RCS	21.10.2022 11:23:37	
76	wert	RCS	17.10.2022 13:51:36	
75	Cakes for all	TS	18.10.2022 14:37:29	
74	12345	RCS	14.10.2022 17:59:39	
72	Tasty cake	TS	14.10.2022 09:36:02	6
71	Discount 90%	TS	11.07.2023 17:21:58	 
69	Your bonus	RCS	07.10.2022 10:50:38	
68	Best name contest	RCS	13.10.2022 15:58:52	
66	Super dill	RCS	13.10.2022 15:56:28	
64	Super will	RCS	13.10.2022 15:56:41	
63	Power pill	RCS	13.10.2022 15:56:51	
62	Don't tell me what to do	RCS	13.10.2022 15:57:06	
61	Wish you could get it	RCS	13.10.2022 15:57:21	
59	Dog lovers only	RCS	17.10.2023 16:57:40	
58	Cat owners only	RCS	13.10.2022 15:57:40	
56	Love this	RCS	13.10.2022 15:58:02	

Page 1 of 1 Show 100 Rows 1-57 of 57

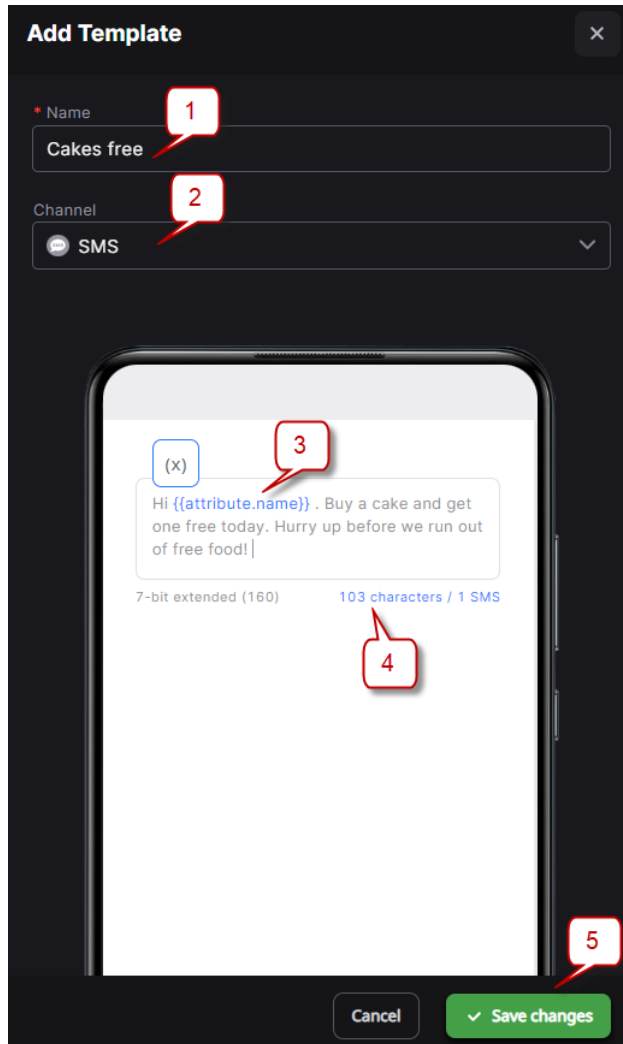
Templates page

The page contains the following details and features:

1. *Template ID.*
2. *Template name.*
3. *Channel (SMS, RCS, Viber, WhatsApp, Email, Push, TTS or Mobile Push).*
4. *Last modified:* the date of the last edit of the template.
5. *Custom view:* click to customize the display of columns.
6. Click  to edit or  to delete the template. Hover over the record to view the controls.
7. Click to add filter.
8. Click  to add a new template.

The process of adding content templates is detailed in [Broadcasts\Message content editor](#)^[35]. However, in this section the interface is slightly different. It is briefly illustrated below. For detailed instructions refer to [Broadcasts\Message content editor](#)^[35].

1. SMS



Add Template

* Name
Cakes free

Channel
SMS

(x)
Hi {{attribute.name}}. Buy a cake and get one free today. Hurry up before we run out of free food!

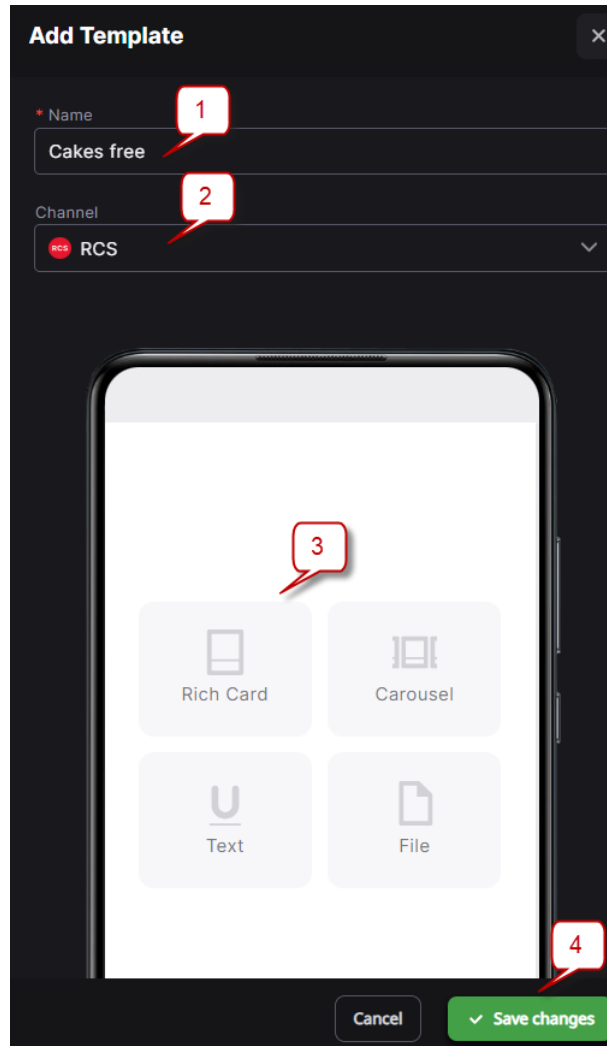
7-bit extended (160) 103 characters / 1 SMS

Cancel Save changes

SMS template

1. Name the template.
2. Select the channel (SMS).
3. Type the message text and personalize the message with data from the user profile in the [Contacts](#) database.
4. See the number of symbols in the message and the number of parts it contains.
5. Save the template or discard the changes.

2. RCS



Add Template [X]

* Name **1**
Cakes free

Channel **2**
RCS

3

Rich Card Carousel
Text File

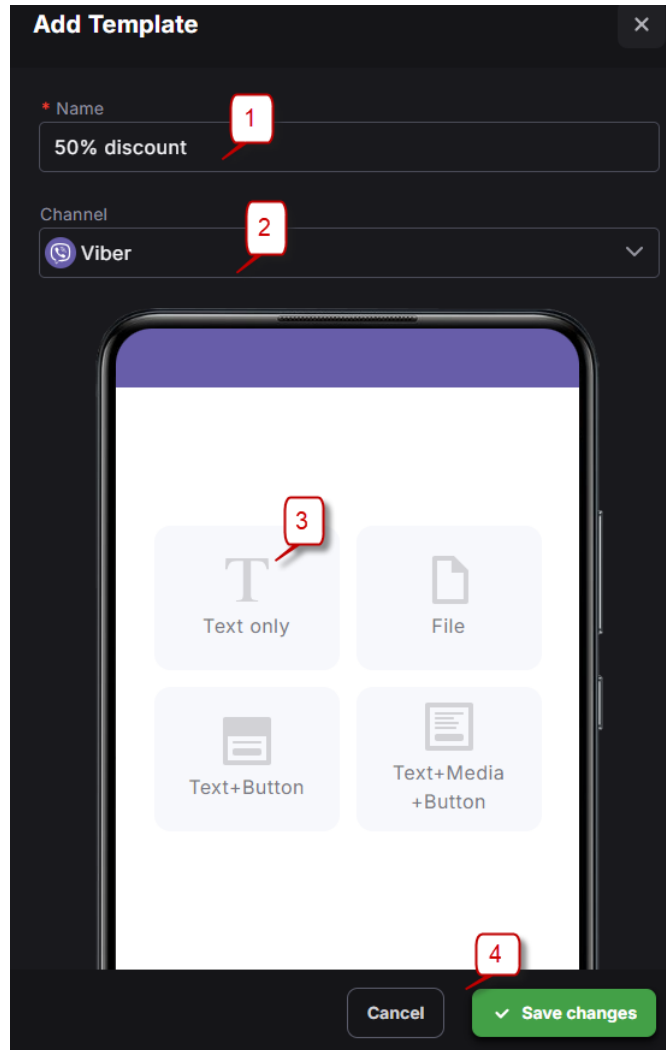
4

Cancel Save changes

RCS template

1. Name the template.
2. Select the channel (RCS).
3. Select the message type (*Rich Card*, *Carousel*, *Text* or *File*) and configure the message as detailed in [RCS message settings](#)³⁷.
4. Save the template or discard the changes.

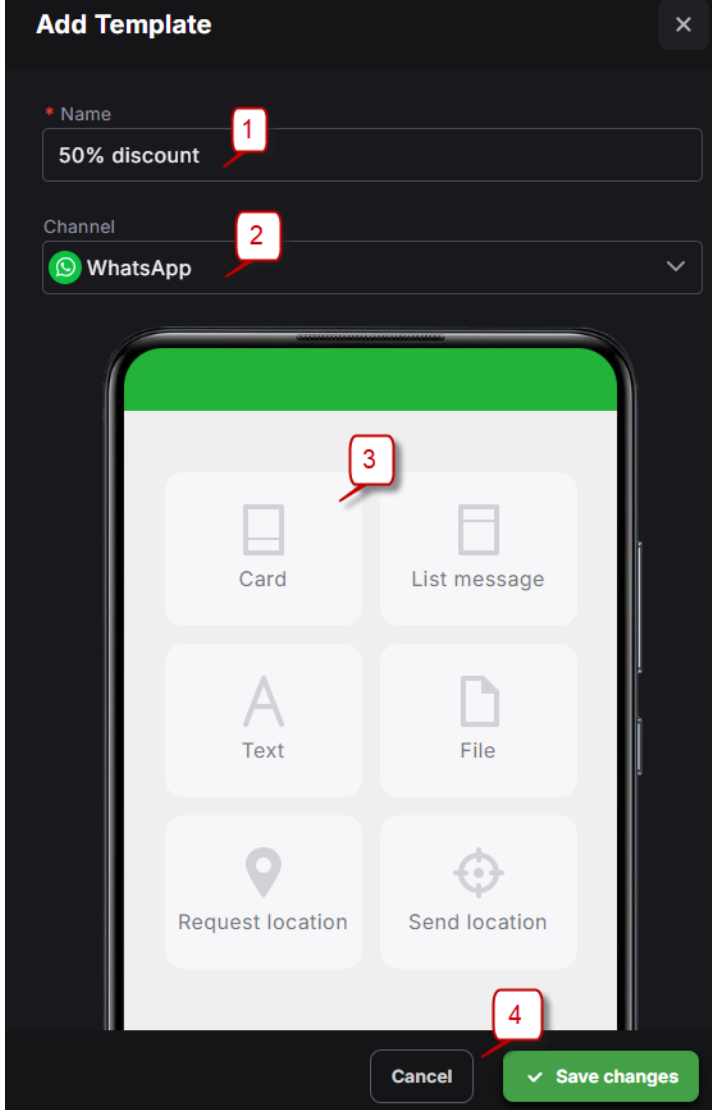
3. Viber



Viber template

1. Name the template.
2. Select the channel (Viber).
3. Select the message type (*Text only*, *File*, *Text + Button* or *Text + Media + Button*) and configure the message as detailed in [Viber message settings](#)⁵⁵.
4. Save the template or discard the changes.

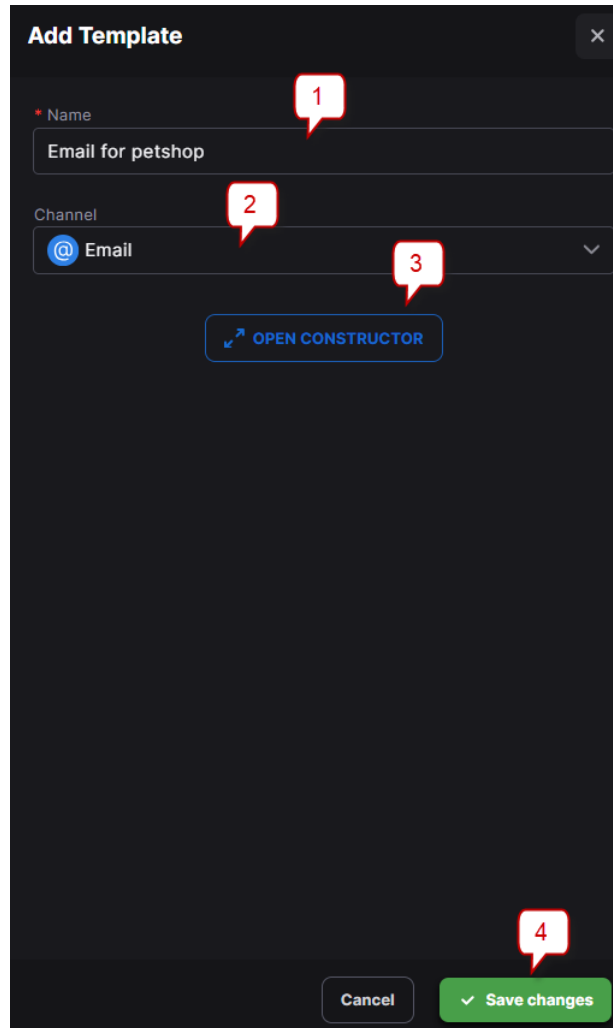
4. WhatsApp



WhatsApp template

1. Name the template.
2. Select the channel (WhatsApp).
3. Select the message type (*Card*, *List message*, *Text*, *File*, *Request location* or *Send location*) and configure the message as detailed in [WhatsApp message settings](#).^[63]
4. Save the template or discard the changes.

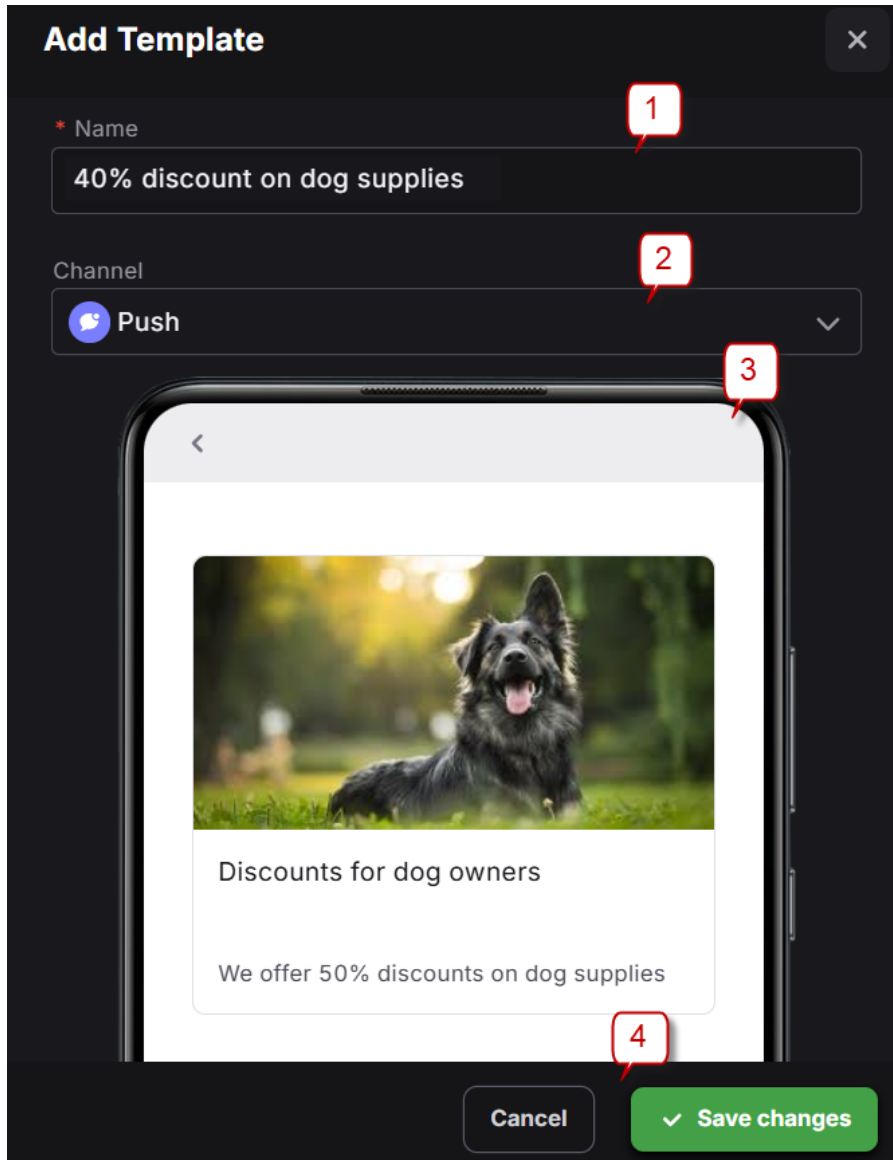
5. Email



Email template

1. Name the template.
2. Select the channel (*Email*).
3. Click *Open constructor* to personalize the message in the message constructor (see [Email message constructor](#)^[74]).
4. Click *Save changes* to save the template or *Cancel* to discard the changes.

6. Push



Add Template [Close]

* Name 1
40% discount on dog supplies

Channel 2
Push [Dropdown Arrow]

3

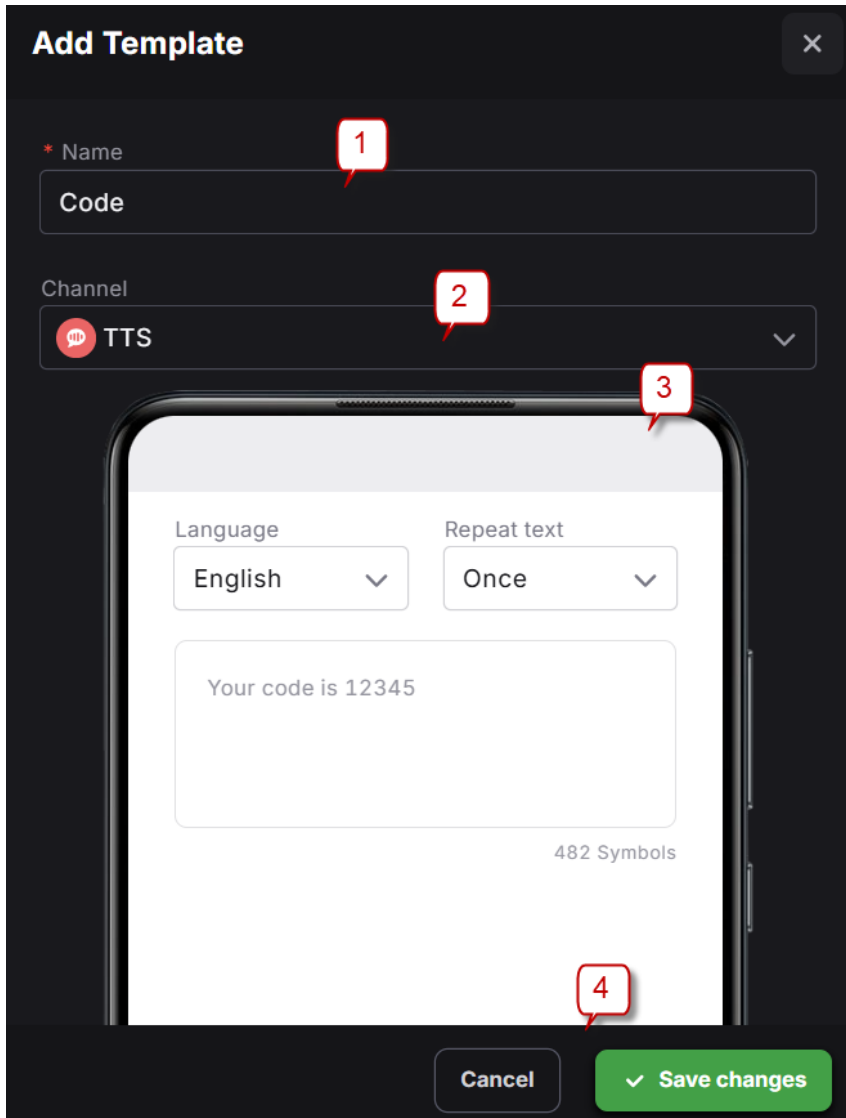
4

Cancel [Save changes]

Push template

1. Supply the name for the template.
2. Select the channel (*Push*).
3. Configure the message in as described in [Push message settings](#) ⁷⁵.
4. Click *Save changes* to save the template or *Cancel* to discard the changes.

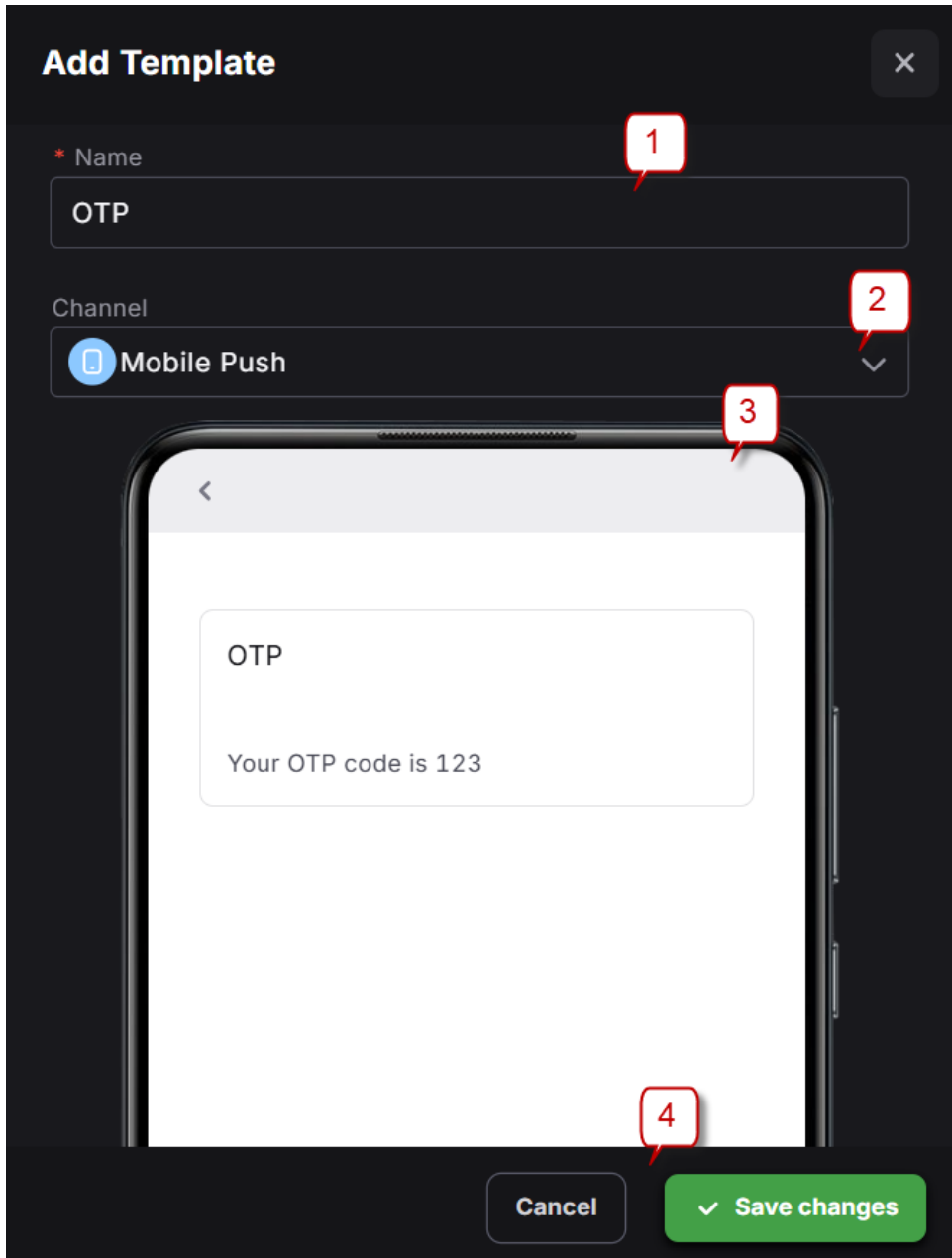
7. TTS



TTS template

5. Name the template.
6. Select the channel (*TTS*).
7. Configure the message in as described in [TTS message settings](#)⁷⁷.
8. Click *Save changes* to save the template or *Cancel* to discard the changes.

8. Mobile Push



Mobile Push template

1. Supply the name for the template.
2. Select the channel (*Mobile Push*).
3. Configure the message in as described in [Mobile Push message settings](#)⁷⁹.
4. Click *Save changes* to save the template or *Cancel* to discard the changes.

NOTE: Content templates can be sent via Omni API. See [Assets\Content templates\Sending Content templates via Omni API](#)¹⁵⁸ for more detail.

12.3.1 Sending Content templates via Omni API

The body of the API requests `/api/v1/messages` and `/api/v1/omnimessages` was modified by adding a new parameter `template`.

The parameter is obligatory if it is required to send a message via template and if an arbitrary message is to be sent parameter payload has to be used.

In case the template does not contain any variables you need to send empty array inside params parameter {}.

12.3.2 Request samples

Sending a message via RCS:

```
curl --location 'https://<APIendpoint>/api/v1/messages' \  
--header 'Content-Type: application/json' \  
--header 'X-API-Key: <APItoken>' \  
--data-raw '{  
"contact": "<dnis>",  
"webhook": "<webhookURL>",  
"channel": 2,  
"senderId": "<senderID>",  
"template": {  
"id": <templateID>,  
"params": {  
"attribute.phoneNumber": "112332",  
"attribute.name": "test-name"  
}  
}  
'
```

Sending a message with the fallback RCS->SMS:

```
curl --location 'https://<API-endpoint>/api/v1/omnimessages' \  
--header 'Content-Type: application/json' \  
--header 'X-API-Key: <API-token>' \  
--data-raw '{  
"contact": "<dnis>",  
"webhook": "<webhookURL>",  
"messages": [  

```

Assets

```
{
"channel": 2,
"senderId": "<senderID>",
"template": {
"id": <templateID>,
"params": {
"attribute.phoneNumber": "112332",
"attribute.name": "test-name"
}
}
},
{
"channel": 1,
"senderId": "<senderID>",
"payload": {
```

12.3.3 Parameters

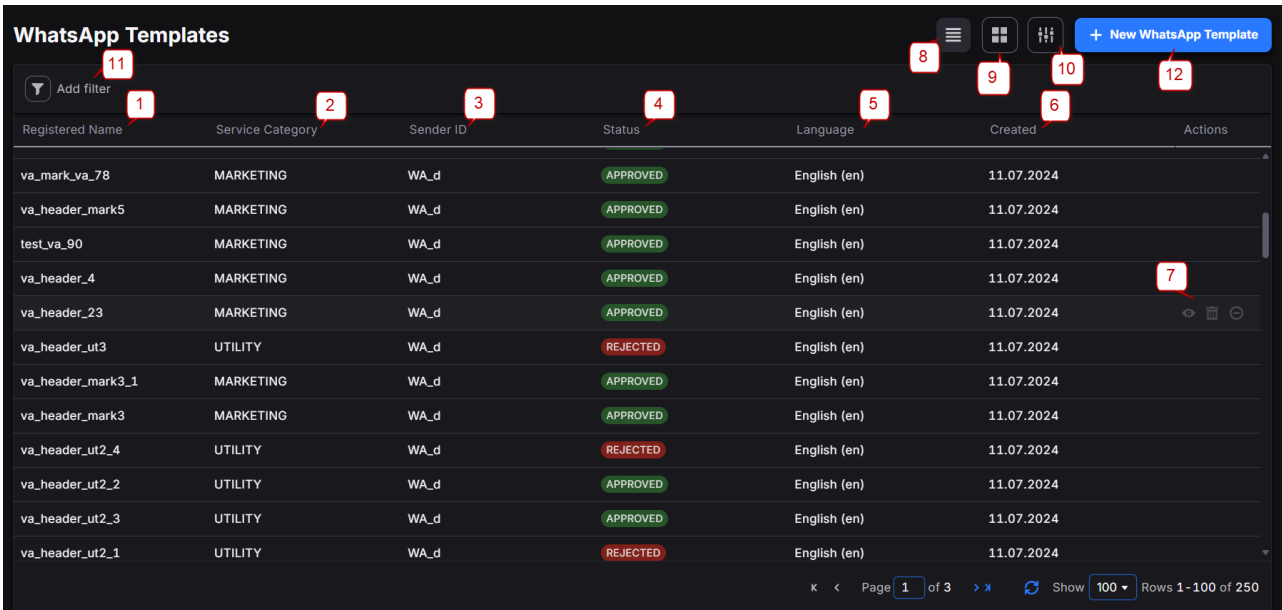
Parameter name	Placeholder	Comment
X-API-Key	<APIToken>	API token which can be generated in the System interface "API connections" <a href="https://<Client-portal-domain>/api-accesses">https://<Client-portal-domain>/api-accesses
contact	<dnis>	Receiving number
webhook	<webhookURL>	URL webhook which will receive status updates and delivery reports
channel	<channelID>	Delivery channel: 1 - SMS, 2 - RCS, 3 - Viber, 4 - WhatsApp, 5 - WeChat, 6 - Email, 7 - Telegram Gateway, 8 - Push, 9 - TTS, 10 - Mobile Push
senderId	<senderID>	Sender ID (registered sender IDs can be found in the interface of Assets->Sender IDs <a href="https://<Client-portal-domain>/media/sender-ids">https:// <Client-portal-domain>/media/sender-ids)
Template id	<templateID>	Template ID which may be found in the interface of Assets->Templates <a href="https://<Client-portal-domain>/media/content-templates">https:// <Client-portal-domain>/media/content-templates
params	n/a	The template attributes should be placed here

12.4 WhatsApp templates

The *Assets\WhatsApp templates* subsection serves to configure WhatsApp templates that allow businesses to initiate direct conversations with recipients or reply to any message initiated by them. Configured

WhatsApp templates shall be submitted to WhatsApp for approval. An unlimited number of templates can be created for each Sender ID.

The *Assets\WhatsApp templates* page contains a table of WhatsApp templates.



Registered Name	Service Category	Sender ID	Status	Language	Created	Actions
va_mark_va_78	MARKETING	WA_d	APPROVED	English (en)	11.07.2024	
va_header_mark5	MARKETING	WA_d	APPROVED	English (en)	11.07.2024	
test_va_90	MARKETING	WA_d	APPROVED	English (en)	11.07.2024	
va_header_4	MARKETING	WA_d	APPROVED	English (en)	11.07.2024	
va_header_23	MARKETING	WA_d	APPROVED	English (en)	11.07.2024	
va_header_ut3	UTILITY	WA_d	REJECTED	English (en)	11.07.2024	
va_header_mark3_1	MARKETING	WA_d	APPROVED	English (en)	11.07.2024	
va_header_mark3	MARKETING	WA_d	APPROVED	English (en)	11.07.2024	
va_header_ut2_4	UTILITY	WA_d	REJECTED	English (en)	11.07.2024	
va_header_ut2_2	UTILITY	WA_d	APPROVED	English (en)	11.07.2024	
va_header_ut2_3	UTILITY	WA_d	APPROVED	English (en)	11.07.2024	
va_header_ut2_1	UTILITY	WA_d	REJECTED	English (en)	11.07.2024	





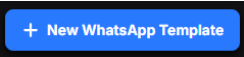

WhatsApp templates

The table contains the following information and controls:

1. *Registered name*: the template name that will be registered on WhatsApp (it is an internal name that recipients will not see).
2. *Service category*: the WhatsApp conversation category that determines its purpose. The following options are available:
 - *Marketing*: promotional offers, announcement of new products and other business-related marketing conversations. There are four types of templates in this category: *Card*, *Carousel*, *Coupon code* and *Limited-time offer*. For more detail on configuration of these templates see [Creating a WhatsApp template](#).
 - *Utility*: conversations directly related to transactions such as order or post-purchase or order notifications, billing statements etc. You can configure *Card* template for this category.
 - *Authentication*: conversations that provide users with authentication codes.
3. *Sender ID*: Sender ID for which the template is created.
4. *Status*: the template status. Statuses are either received from the WhatsApp API or WhatsApp business provider. It means that they may differ depending on the business provider with which the System owner works. Statuses either indicate the template approval (*Submitted*, *Pending*, *Approved*, *Rejected* and *In appeal*), its removal state (*Pending for deletion*, *Deleted*), or show the template quality rating (*Disabled*, *Paused*, *Limit exceeded*). The only internal System status is *Draft* which shows that the template has been saved in the System but not submitted to WhatsApp for approval.

NOTE: For more detail on specific statuses refer to WhatsApp or appropriate WhatsApp business provider.

5. *Language*: language selected for the template.
6. *Created*: date when the template was created.

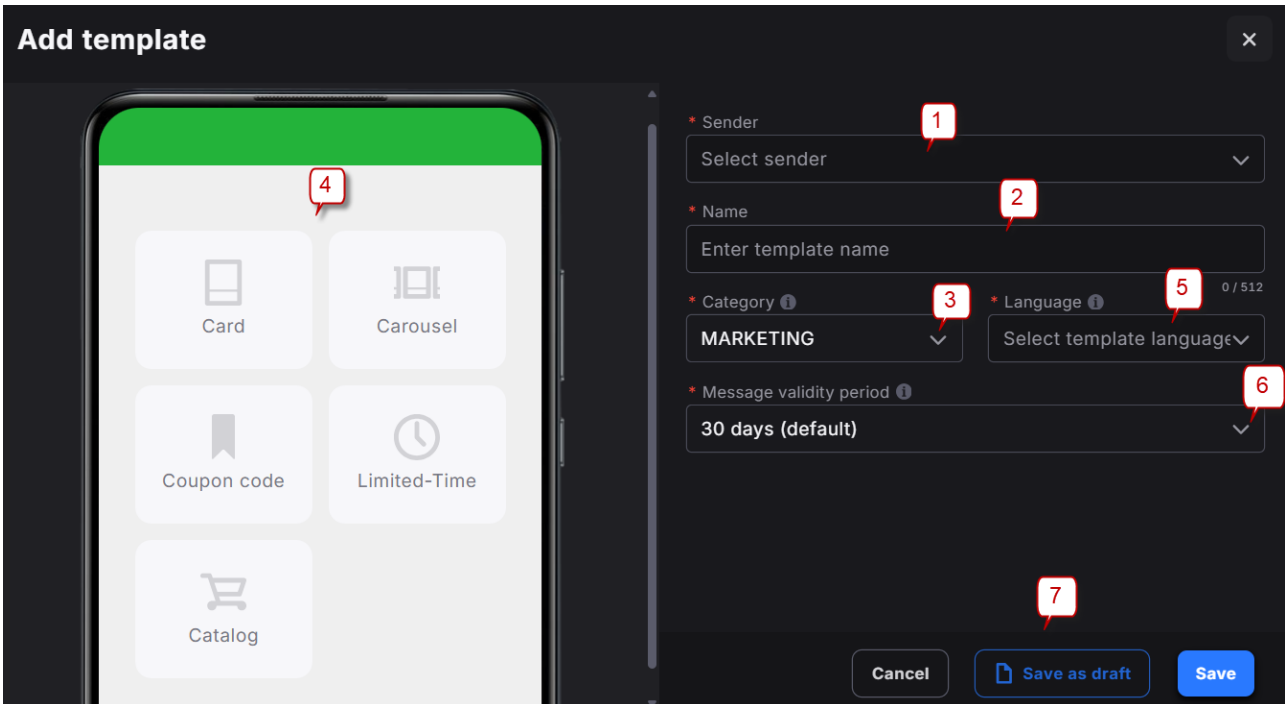
7. *Actions*: hover over the record to view the controls. Click  to view the template,  to delete it from both the System and the WhatsApp platform (the template will be removed from the interface), or  to delete it from the WhatsApp platform and let it stay in the System (the template status in the System will be changed to *Deleted*). To resubmit a template, create a new one with the same properties.
8. Click to select list view. List view is selected by default.
9. Click to select card view. The tile view provides a preview of WhatsApp templates.
10. Click  to customize the display of columns.
11. Click to add filter.
12. Click *New WhatsApp Template*  to create a new template.
 - *General*: select to open *Add template* window and create a template from scratch.
 - *Pre-Approved*: select to open the [Pre-Approved templates](#)  page and create a template based on a pre-approved one from the template library.

Configure the template as explained below.




12.4.1 Creating a WhatsApp template

The following WhatsApp templates can be created:

1. Marketing category:
 - *Card*;
 - *Carousel*;
 - *Coupon code*;
 - *Limited-time offer*;
 - *Catalog*.
2. Authentication:
 - *Authentication*;
3. Utility:
 - *Card*.



Add template

1. Select the Sender ID.
2. Supply the template name. It can only contain lowercase alphanumeric characters and underscores (_). To speed up the approval process and streamline navigation between templates in the System, it is recommended to use descriptive, self-explanatory names.
3. Select the conversation category (explained earlier in this section).
4. Configure the template. For details on different types of templates see below.
5. Select the language.
6. Select *Message validity period* i.e. how long a provider should attempt to deliver the message. It is 30 days by default.
7. Click *Save as draft*  to save the template as draft; click *Save*  to save the template in the System; click *Cancel*  to discard the changes.

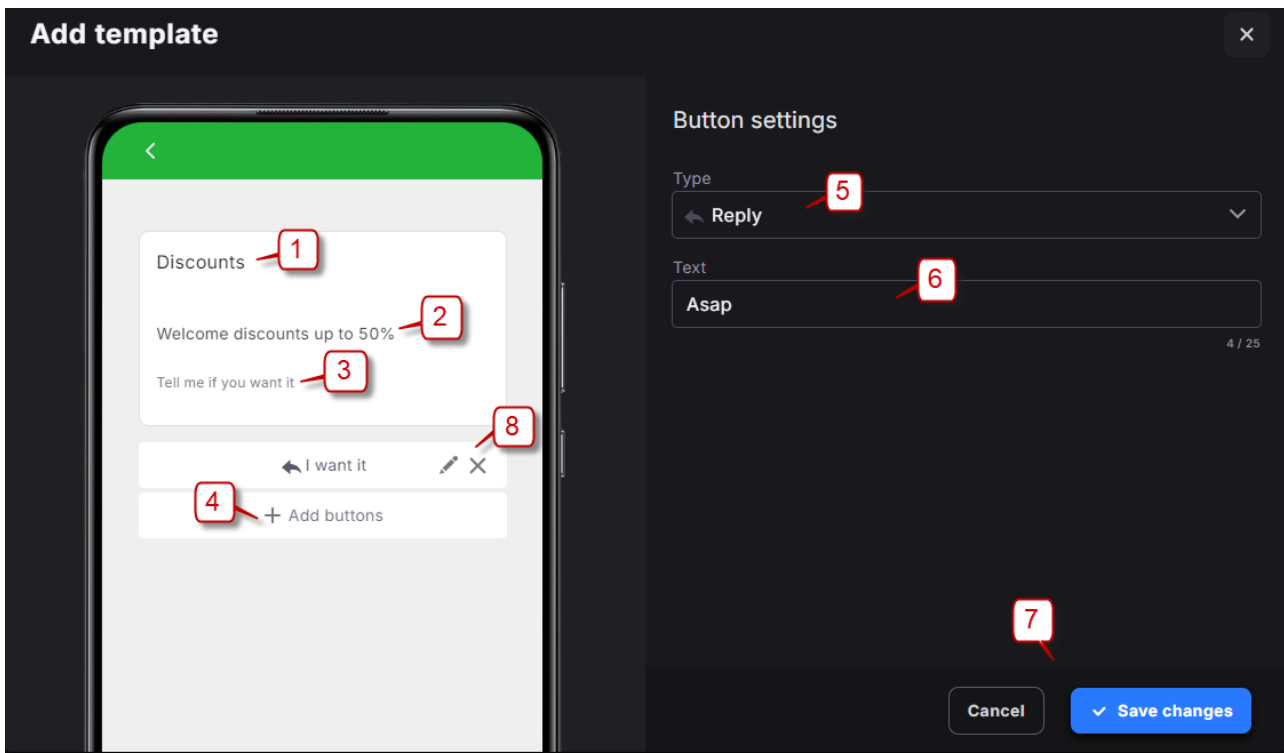
NOTE: Images, videos and documents are used in the template as an example and will be replaced by images and videos as appropriate. All text fields in the template can use variables. Variables must be numeric and enclosed in double curly brackets, for example {{1}}. Supply the variable description in the edit box that appears below the text field containing a variable.

NOTE: If no template type or an unsupported template type is specified, an error is returned prompting to select a template type.

NOTE: Certain parameters apply for each button while submitting the WhatsApp template:

- Button variables: If the button uses variables, all variables shall be set to a custom value. If at least one variable value is empty, the System will return an error.
- Copy button: Copy buttons shall contain a code. If no code is specified, an error is returned.

12.4.1.1 Add a new Card template



Add Card template

1. Configure the template header (maximum 50 symbols). Enter the message text in the edit box, load an image from your device or from the [Media content database](#) or leave it blank.

NOTE: If the format of the header is an image, video, or document, the appropriate link will be checked after you submitted the template for validation. If there is no link an error will be returned.

NOTE: The header can contain only one variable. If there is more than one variable, the System will return an error. This variable shall be filled in.

NOTE: If the format of the header is *Location*, all parameters (address, latitude, longitude, and place name) are applied. If at least one of these parameters is missing, the System will return an error.

2. Configure the template body (maximum 550 symbols and up to 10 emojis). Enter the message text in the edit box.

NOTE: Message body always contains text. If there is no text, an error is returned.

NOTE: If the header or body contains variables, their keys shall be unique. If the variable keys are repeated, an error is returned.

NOTE: If variables are present, all of them shall be set to a custom value. If at least one variable is empty, the System will return an error.

3. Configure the template footer (maximum 60 symbols). Enter the message text in the edit box or leave it blank.
4. Add buttons to the template. You can add up to 10 buttons.
5. Select the button type. Possible options include:

- Reply (for example, Yes or No).
- URL: contains *Url* (open a link).

NOTE: If *URL* is selected, choose URL, specify the button text (*Text* field), and provide the URL in the URL field. If *Reply* is selected, specify the button text in the *Text* field.

NOTE: Maximum allowed number of buttons with an URL is 2. If there are more than 2 buttons, the System will return an error.



NOTE: The button URLs are unique. If at least one URL is duplicated, an error will be returned.

6. Enter the button text in the edit box.

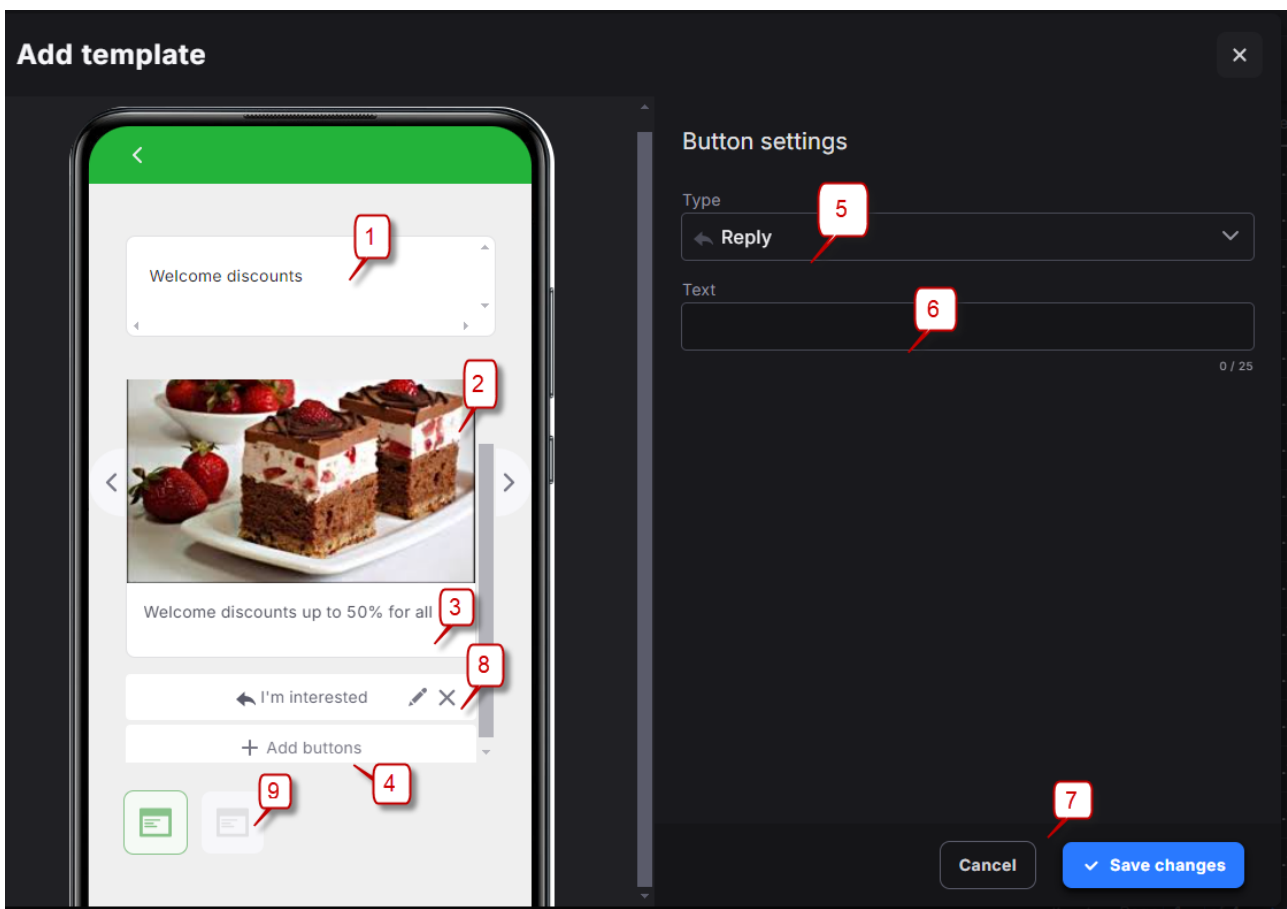
NOTE: Each button has a unique text. If the button text is duplicated, the System will return an error.

NOTE: If variables are present, all of them shall be set to a custom value. If at least one variable is empty, the System will return an error.

7. Click *Save changes*  to add button or *Cancel*  to discard the changes.

8. Click  to edit the button or  to delete it.

12.4.1.2 Add a new Carousel template



Add Carousel template

1. Configure the card header. Enter the message text in the edit box, load an image from your device or from the [Media content database](#) ¹⁴²¹ or leave it blank.

NOTE: Each card must have a header with an image, video, or document. If the header is missing, the System will return an error (containing the card number).

NOTE: The header format (image, video or document) of all cards shall match. If the formats are different, an error is returned.

2. Configure the template body (maximum 550 symbols and up to 10 emojis). Enter the message text in the edit box.
-

NOTE: Message body shall contain text. If there is no text, an error is returned.

NOTE: If the card body contains variables, their keys shall be unique and all variables shall be populated and contain values. If keys are repeated or variables are empty, an error is returned.

3. Configure the template footer. Enter the message text in the edit box or leave it blank.
 4. Add buttons to the template.
-

NOTE: Each card shall have minimum one and maximum 10 buttons. If there are no buttons, the System will return an error.

5. Select the button type. Possible options include:
 - *Reply* (for example, Yes or No). Up to two buttons can be added.
 - *URL*: contains *Url* (open a link). Only one button can be added.
-

NOTE: If *URL* is selected, choose *URL*, specify the button text (*Text* field), and provide the URL in the *URL* field. If *Reply* is selected, specify the button text in the *Text* field.

NOTE: Button URLs are unique. If at least one URL is repeated, an error will be returned.

6. Enter the button text in the edit box.
-

NOTE: Each button has a unique text. If the button text is duplicated, the System will return an error.

NOTE: If variables are present, all of them shall be set to a custom value. If at least one variable is empty, the System will return an error.

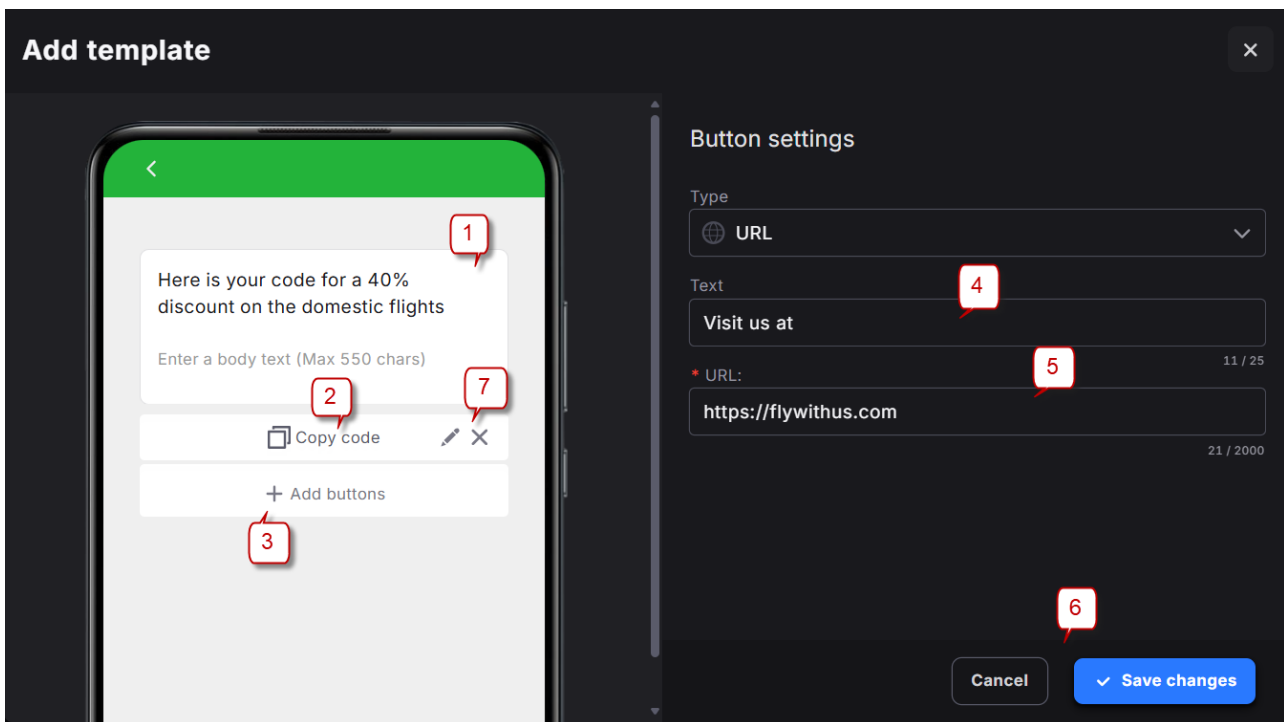
7. Click *Save changes*  to add button or *Cancel*  to discard the changes.

8. Click  to edit the button or  to delete it.

9. Add a new card as described above. You can configure up to 10 cards.
-

NOTE: There shall be at least two cards in the carousel. If there are less than 2 cards, an error is returned.

12.4.1.3 Add a new Coupon Code template



Add Coupon Code template

1. Configure the template body (maximum 550 symbols and up to 10 emojis). Enter the message text in the edit box.

NOTE: Message body shall contain text. If there is no text, an error is returned.

NOTE: If the header or body contains variables, their keys shall be unique. If the variable keys are repeated, an error is returned. If variables are present, all of them shall be set to a custom value. If at least one variable is empty, the System returns an error.

2. Add *Copy code* button to the template. Enter code in the *Code* field and click *Save changes*.

NOTE: If the template doesn't contain *Copy code* button an error will be returned by the System.

NOTE: Only one *Copy code* button can be added. If there is more than one such button, an error will be returned.

3. Add one or several *URL* buttons that contain Url (open a link).

NOTE: Button URLs are unique. If at least one URL is repeated, an error will be returned.



4. Enter the button text in the edit box.

NOTE: Each button has a unique text. If the button text is duplicated, the System will return an error.

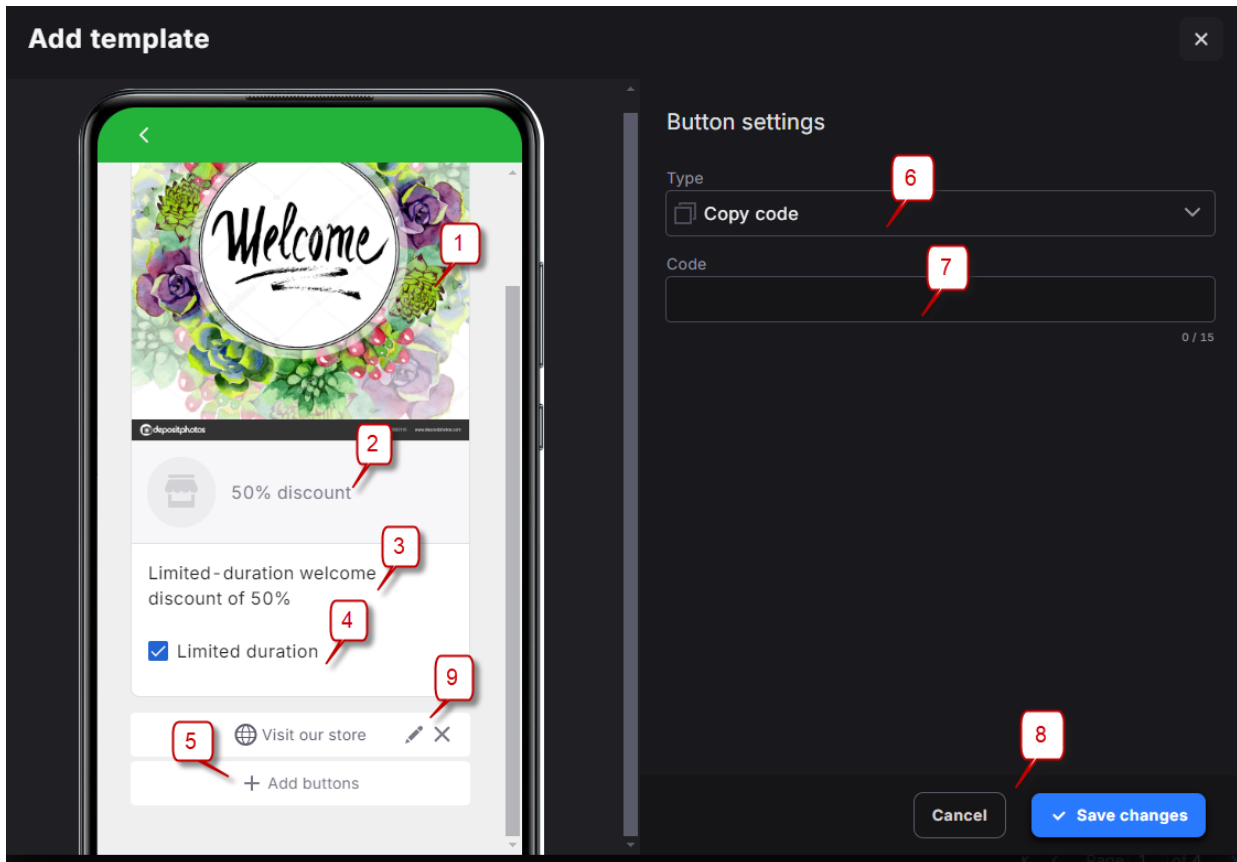
NOTE: If variables are present, all of them shall be set to a custom value. If at least one variable is empty, the System will return an error.

5. Provide the URL in the *URL* field.

6. Click *Save changes*  to add button or *Cancel*  to discard the changes.

7. Click  to edit the button or  to delete it.

12.4.1.4 Add a new Limited-time offer template



Add Limited-time offer template

1. Configure the template. Load an image from your device or from the [Media content database](#)¹⁴².

NOTE: The header always contains an image. If the header is missing or the format of the header is not an image, an error will be returned.

2. Enter the offer text (Maximum 16 characters).
3. Enter the body text. (Maximum 550 characters and up to 10 emojis).

NOTE: The message shall contain text and offer text. If either of these is missing, an error is returned.

NOTE: If the header or body contains variables, their keys shall be unique. If the variable keys are repeated, an error is returned. If variables are present, all of them shall be set to a custom value. If at least one variable is empty, the System returns an error.

4. Select *Limited duration* if the offer is valid for a limited period of time.

NOTE: If the offer has limited duration, it is important that an end date is applied. If no date is specified, an error will be returned.

5. Click to add buttons and go to the settings.
6. Possible options include:
 - *Copy code*. Only one button can be added.

- *URL*: contains *Url* (open a link).

NOTE: Template shall contain at least one *URL* button. If no *URL* button is added, an error is returned.

7. Enter the code in the edit box.

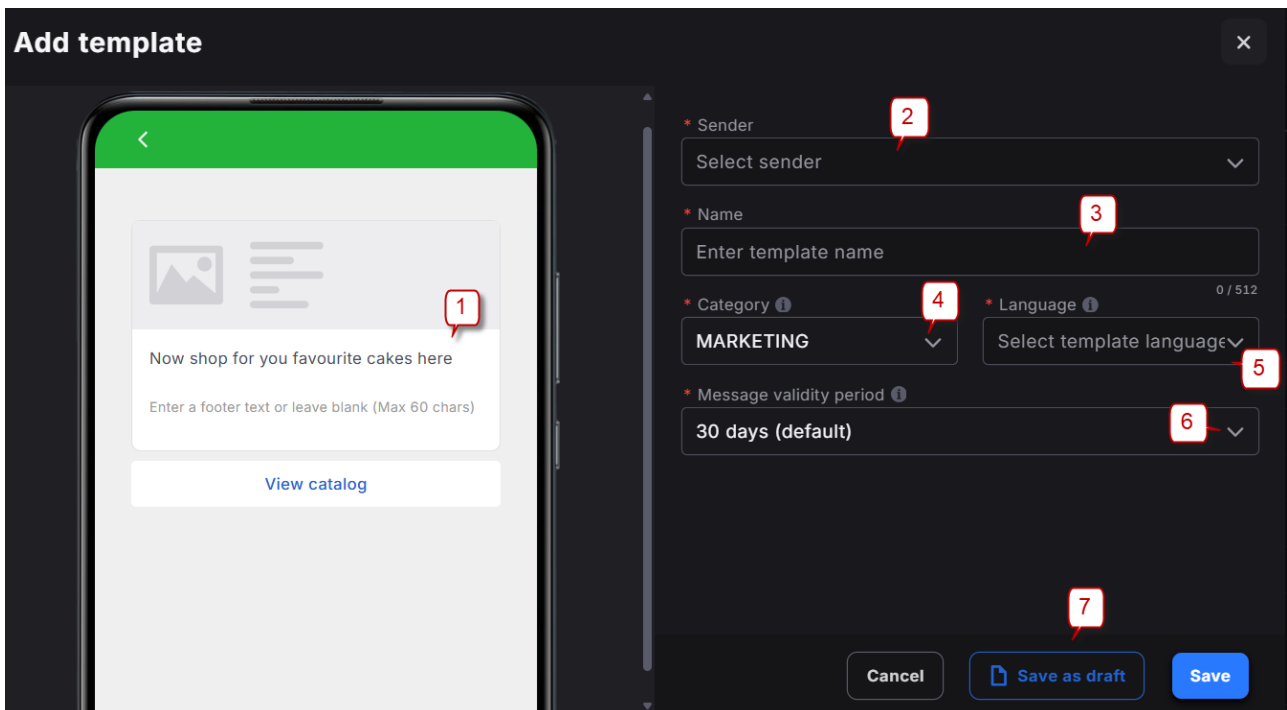
8. Click *Save changes*  to add button or *Cancel*  to discard the changes.

NOTE: Each button has a unique text. If the button text is duplicated, the System will return an error.

NOTE: If variables are present, all of them shall be set to a custom value. If at least one variable is empty, the System will return an error.

9. Click  to edit the button or  to delete it.

12.4.1.5 Add a new Catalog template



Add Catalog template

1. Configure the template body (maximum 550 symbols and up to 10 emojis) and footer (maximum 60 symbols).

NOTE: Message body shall contain text. If there is no text, an error is returned.

NOTE: If the body or footer contains variables, their keys shall be unique. If the variable keys are repeated, an error is returned. If variables are present, all of them shall be set to a custom value. If at least one variable is empty, the System returns an error.

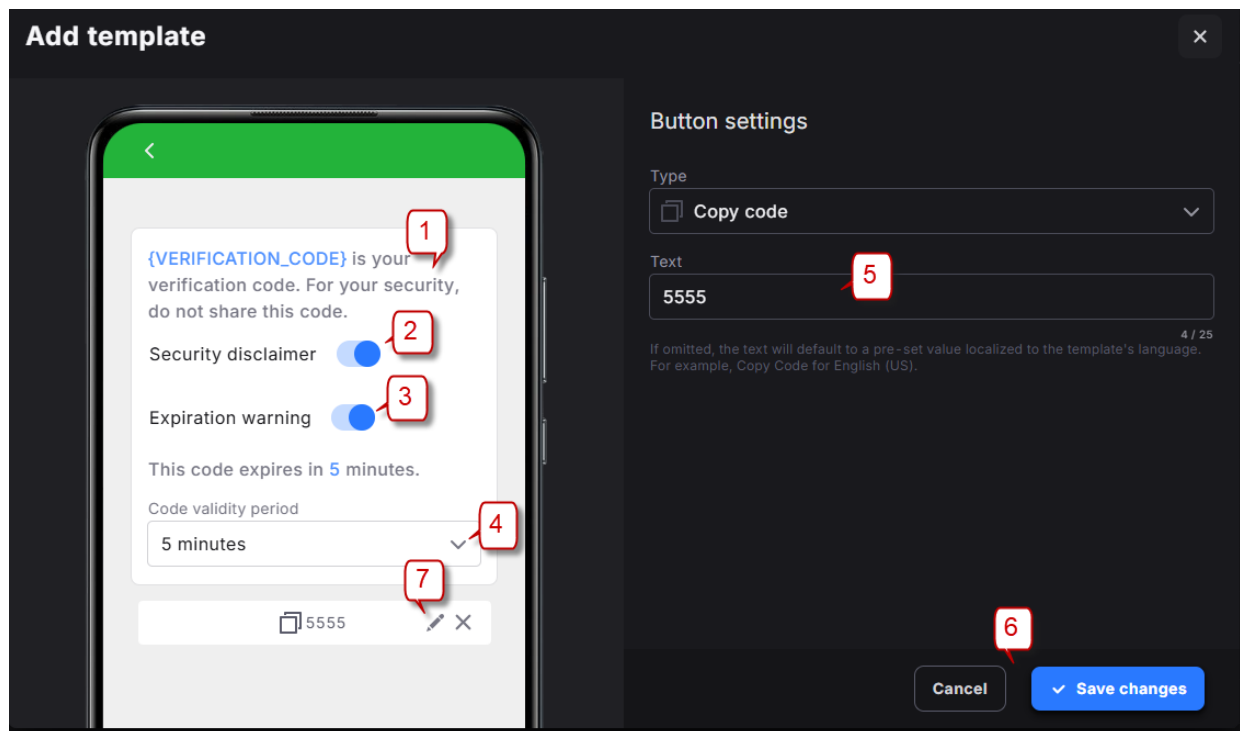
2. Select the Sender ID.
3. Supply the template name.
4. Select the conversation category (*Marketing*).
5. Select the language.

6. Select *Message validity period* i.e. how long a provider should attempt to deliver the message. It is 30 days by default.

7. Click *Save changes*  to add button or *Cancel*  to discard the changes.

NOTE: To send a catalog on WhatsApp create a *Catalog* template in the Client portal, then create a catalog in the Meta interface and populate it with appropriate content.

12.4.1.6 Add a new Authentication code template



Add Authentication code template

1. The message body is preconfigured.
2. Select to add *Security disclaimer*. "For you security don't share this code" message will appear in the message body.
3. Select to add *Expiration warning*.

NOTE: If *Expiration warning* is selected but no expiration time is specified, an error is returned.

4. Provide a variable in the *Code validity period* field. This field appears only if the *Expiration warning* toggle is switched.
5. Add *Copy code* button. Only one button can be added. Provide code in the *Text* field.

NOTE: The template shall contain at least one *Copy code* button. If there is no button, an error is returned.

6. Click *Save changes*  to add button or *Cancel*  to discard the changes.

NOTE: If there is no text in the *Copy code* button, WhatsApp will provide the default text "*Copy code*".

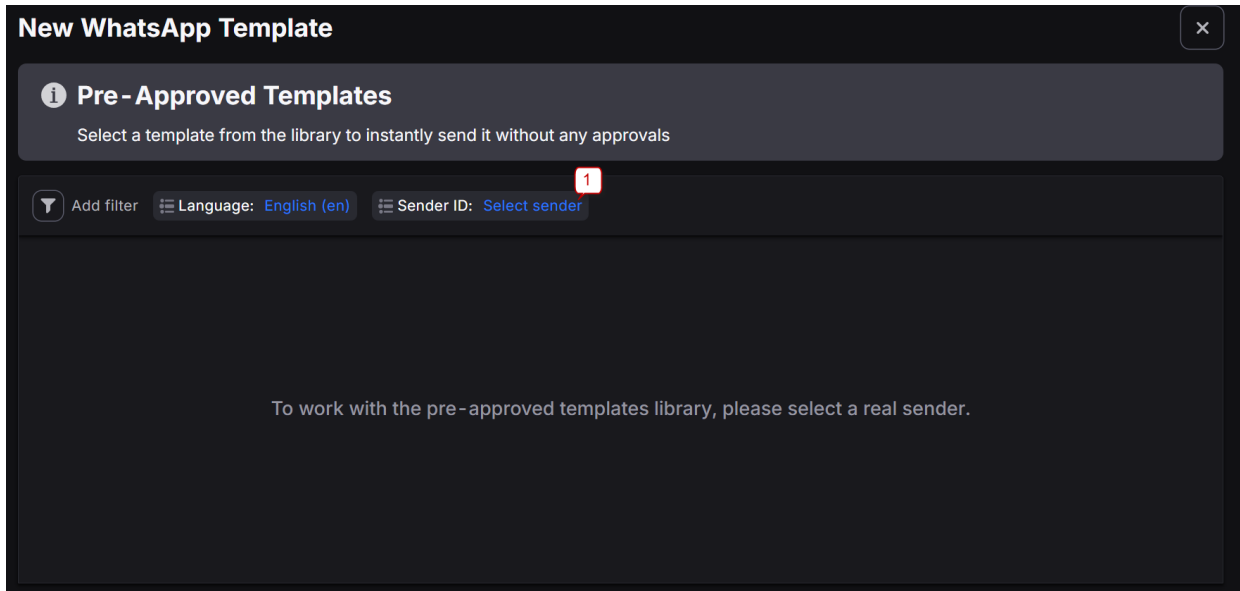
7. Click  to edit the button or  to delete it.

NOTE: Each button has a unique text. If the button text is duplicated, the System will return an error.

NOTE: If variables are used, all of them shall be set to a custom value. If at least one variable is empty, the System returns an error.

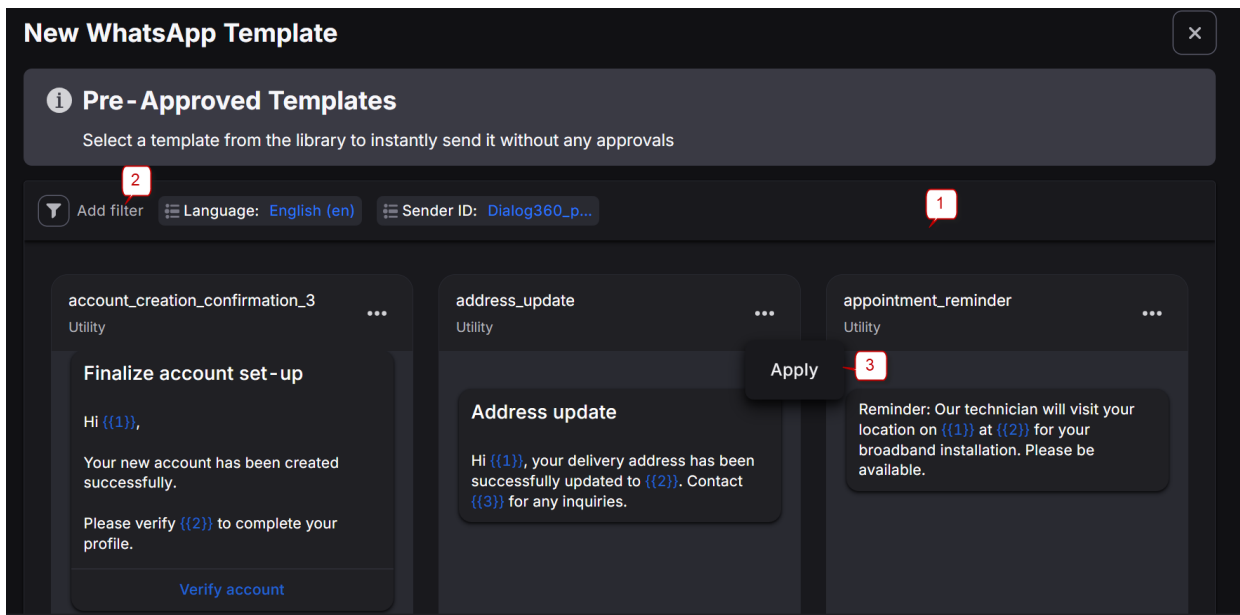
12.4.1.7 Pre-Approved Templates

Creating a template based on a pre-approved template helps streamline the process of adding templates and coordinating their status with Meta, as such templates quickly obtain the *Approved* status.



Pre-Approved templates page

1. Select a sender with the *Active* status from the drop-down list to start working with the pre-approved templates library.



Pre-Approved templates library

The page contains the following elements and controls:


1. WhatsApp template library: a card view of pre-approved WhatsApp templates list. Each card contains the name of the template, its category and text.

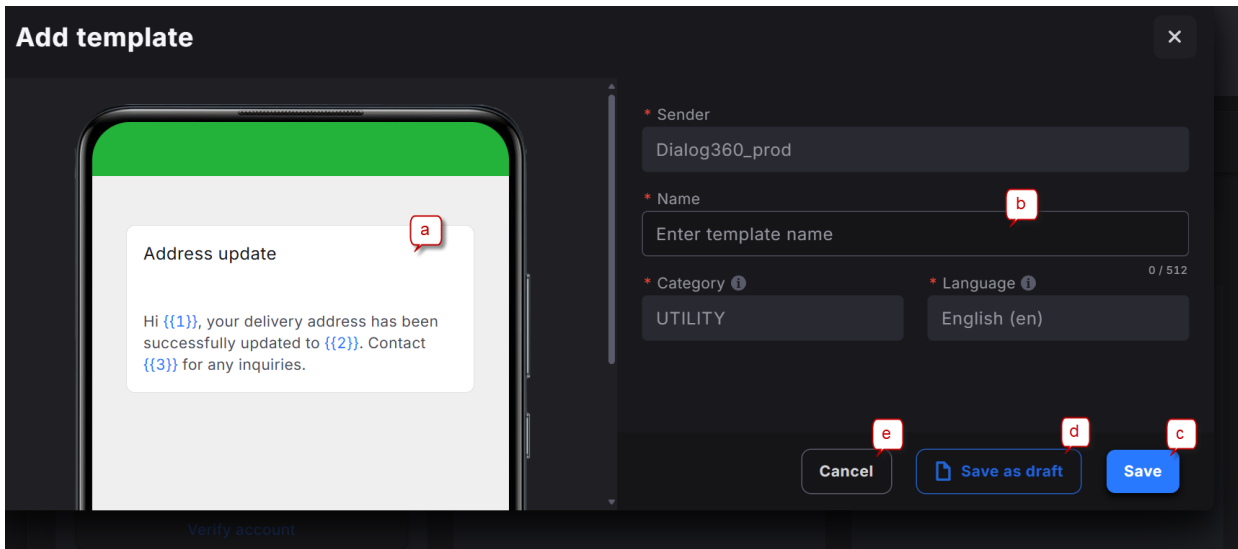
NOTE: Sorting and pagination are not available for the pre-approved templates library.

2. Click to add filter. Filtering is available by value: *Registered Name, Use case, Industries, Topics, Sender ID, Language*.
 - *Registered name* filter serves to filter templates by the name registered with the provider.
 - *Use case* filter serves to filter templates according to the usage option. Possible values are:
 - Account Creation Confirmation.
 - Feedback Survey.
 - Shipment Confirmation;
 - Return Confirmation;
 - Order Pick-up;
 - Order Delay;
 - Order or Transaction Cancelled;
 - Order Action Needed;
 - Delivery Update;
 - Order Confirmation;
 - Delivery Failed;
 - Delivery Confirmation;
 - Statement Available;
 - Transaction Alert;
 - Receipt Attachment;
 - Statement Attachment;
 - Payment Scheduled;
 - Payment Due Reminder;
 - Payment Overdue;
 - Payment Rejected / Failed;
 - Payment Confirmation;
 - Payment Action Required;
 - Low Balance Warning;
 - Fraud Alert;
 - Auto Pay Reminder.


- *Industries* filter server to filter templates based on the industry that they are used in. Possible options are:
 - E-commerce;
 - Financial.
- *Topics* filter serves to filter templates by the topic. Possible options are:
 - Account updates;
 - Customer feedback;
 - Order management;
 - Payments.
- *Sender ID* filter serves to select the sender which will be used to request the pre-approved templates library from the provider.
- *Language* filter serves to filter templates by the language which will be used when sending the template to the contact.

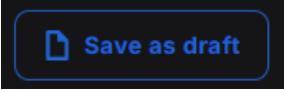
NOTE: All templates in the library are displayed in the language selected in the *Language* filter field.

3. Click *Apply*  to display the *Add template* panel that serves to customize the template and save it in the "own" template list.



Add pre-approved template

- a. Text preview.
- b. Type the template name.
- c. Click *Save*  to add the template to the "own" templates list with the *Approved* status. It will be available for sending to contacts without additional approvals from Meta.



- d. Click *Save as draft* to save the template in the "own" templates list with the *Draft* status. Its further use will be available only after verification by Meta.

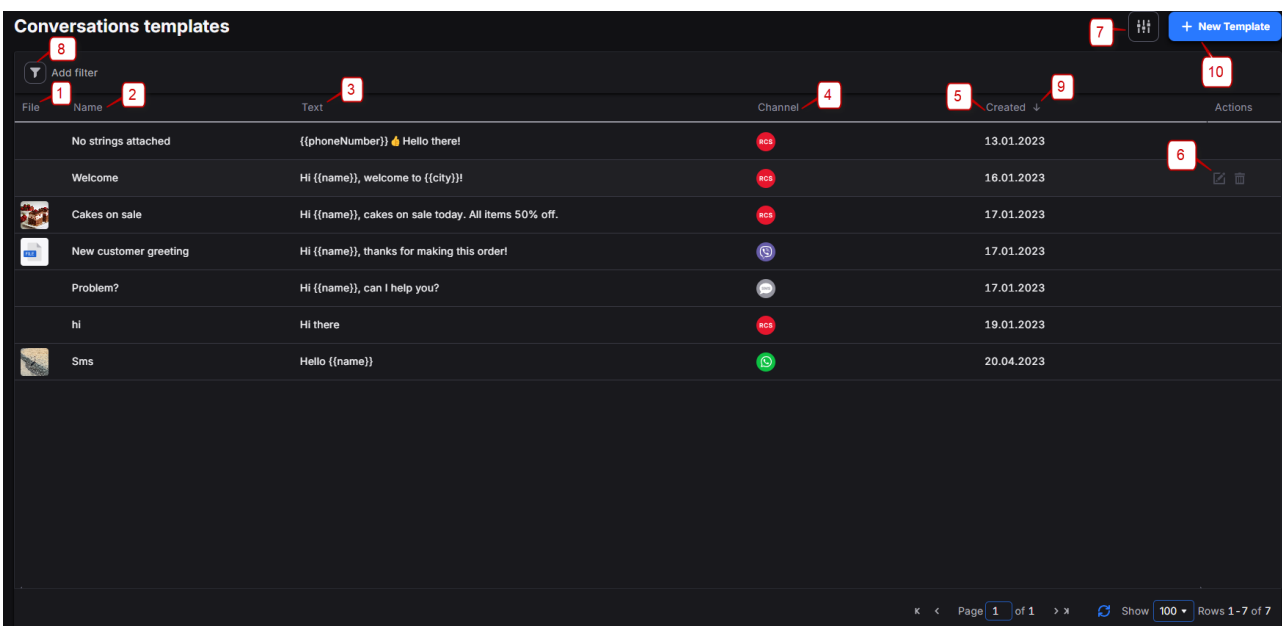


- e. Click *Cancel* to discard the changes.

NOTE: Some pre-approved template parameters are not customized.

12.5 Conversations templates



The *Assets\Conversations templates* subsection serves to create and store message templates for the [Conversations\Conversations](#) interface. Such templates can also be created directly in the [Conversations\Conversations](#) interface.

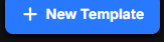


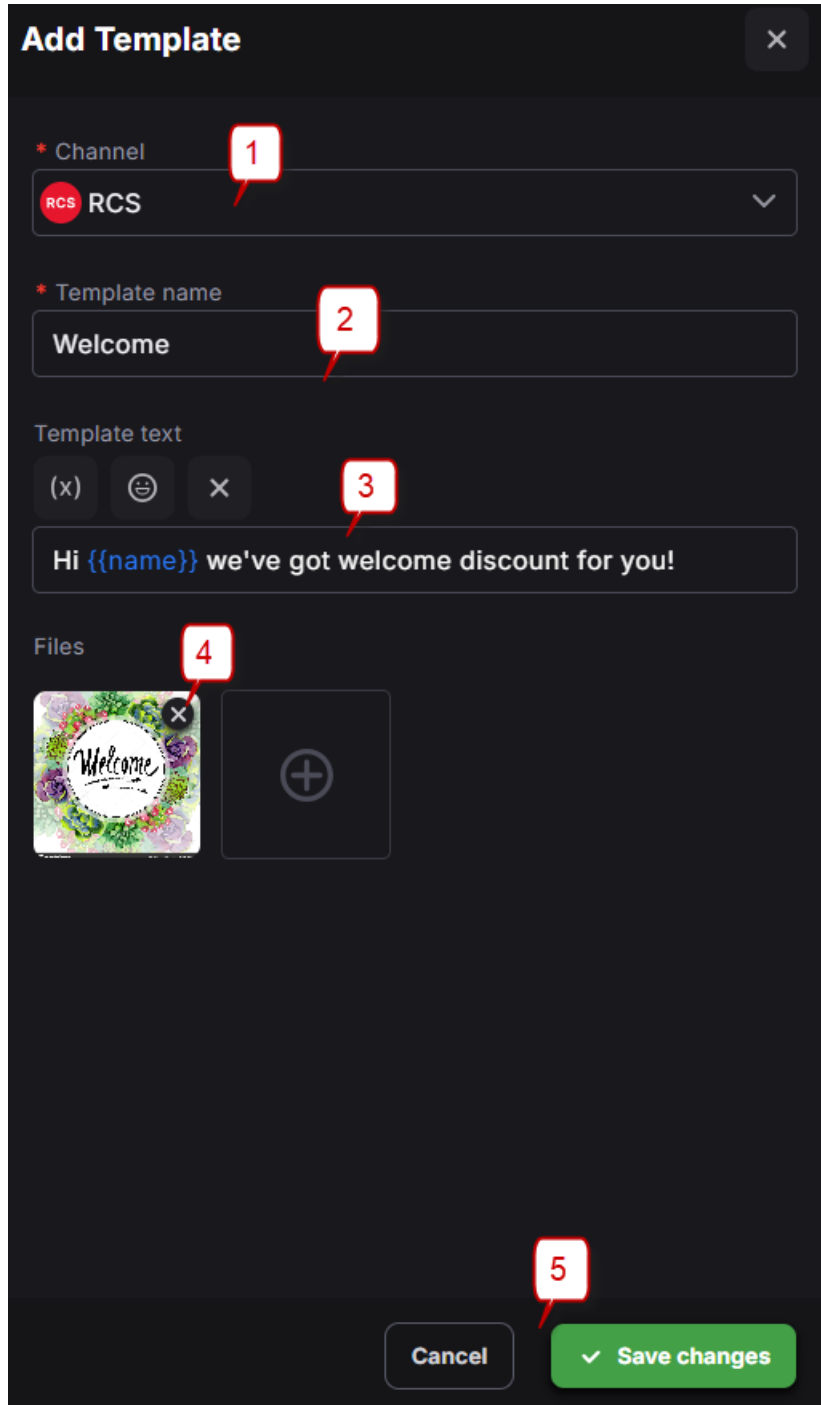
File	Name	Text	Channel	Created	Actions
No strings attached		{{phoneNumber}} Hello there!	RCS	13.01.2023	
Welcome		Hi {{name}}, welcome to {{city}}!	RCS	16.01.2023	
Cakes on sale		Hi {{name}}, cakes on sale today. All items 50% off.	RCS	17.01.2023	
New customer greeting		Hi {{name}}, thanks for making this order!		17.01.2023	
Problem?		Hi {{name}}, can I help you?		17.01.2023	
hi		Hi there	RCS	19.01.2023	
Sms		Hello {{name}}		20.04.2023	

Conversation templates

The page contains the following details and features:

- File*: attached files.
- Name*: template name.
- Text*: message text.
- Channel* (RCS, SMS, WhatsApp, Viber, Email, Push, TTS, Mobile Push).
- Created*: template creation date.
- Actions*: click  to edit or  to delete the template. Hover over the record to view the controls.
- Custom view*: click to customize the display of columns.
- 1.13.0 Click to add filter.
- Click to apply sorting (descending or ascending).

10. Click  to add a new template.



The screenshot shows a dark-themed 'Add Template' dialog box. It contains the following elements:

- 1**: A dropdown menu for 'Channel' with 'RCS' selected.
- 2**: A text input field for 'Template name' containing 'Welcome'.
- 3**: A text input field for 'Template text' containing 'Hi {{name}} we've got welcome discount for you!'. Above the field are icons for text formatting: (x), a smiley face, and a close (x) icon.
- 4**: A 'Files' section showing a preview of a 'Welcome' image with a floral border and a plus icon for adding more files.
- 5**: A green 'Save changes' button with a checkmark icon, next to a 'Cancel' button.

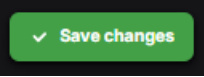
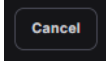
Add template

Configure the following details:

1. Select the channel.
2. Enter the template name.
3. Supply the template text. Use the text formatting controls if necessary (they are explained in [Conversations\Conversations](#) ^[101]).

NOTE: Due to RCS format limitations, when sending text with an attached image through the RCS channel, the text and image will be sent in two different messages.

4. Click to attach a file from the media database (for instructions on uploading files to the media database refer to [Assets\Media](#)^[142]).

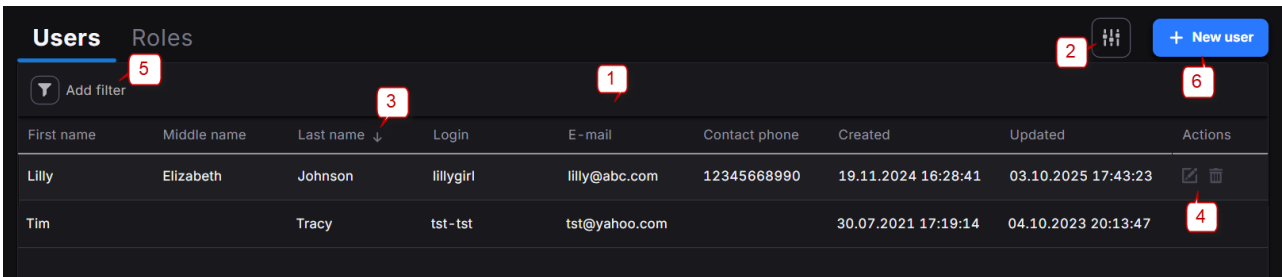
5. Click *Save changes*  to save the template or *Cancel*  to discard changes.





13 Users

The *Users* interface serves to create and manage BackOffice and Client portal users and their roles. It consists of two tabs: *Users* and *Roles*.



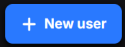
13.1 Users

The *Users* tab serves to create new users and edit their records.



First name	Middle name	Last name ↓	Login	E-mail	Contact phone	Created	Updated	Actions
Lilly	Elizabeth	Johnson	lillygirl	lilly@abc.com	12345668990	19.11.2024 16:28:41	03.10.2025 17:43:23	 
Tim		Tracy	tst-tst	tst@yahoo.com		30.07.2021 17:19:14	04.10.2023 20:13:47	 

Users tab

- The table contains the following parameters:
 - First name*: user's first name.
 - Middle name*: user's middle name (if applicable).
 - Last name*: user's last name.
 - Login*: user's login.
 - E-mail*: user's e-mail.
 - Contact phone*: user's contact phone.
 - Created*: date when user was created set as DD:MM:YYYY HH:MM:SS.
 - Updated*: date of the last update set as DD:MM:YYYY HH:MM:SS.
 - Actions*: hover over the record to view the controls.
- Click to customize the display of columns.
- Click to apply sorting (descending or ascending).
- Click  to edit the record, and  to delete the record.
- Click to add filter.
- Click *New user*  to create a new user.

13.2 Adding users

The *User* panel contains two tab sheets: *General* for user settings and *Role* for defining the user's rights and permissions.

User ✕

General
Role

*** First name** 1

*** Last name** 2

Middle name 3

*** Department** 4

First line support
▾

*** Language** 5

English
▾

*** Login** 6

*** Password** 7

*** E-mail** 8

Contact phone 9

Two Factor Authentication 10

Enabled 11

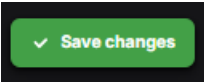
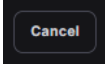
Cancel
✓ Save changes

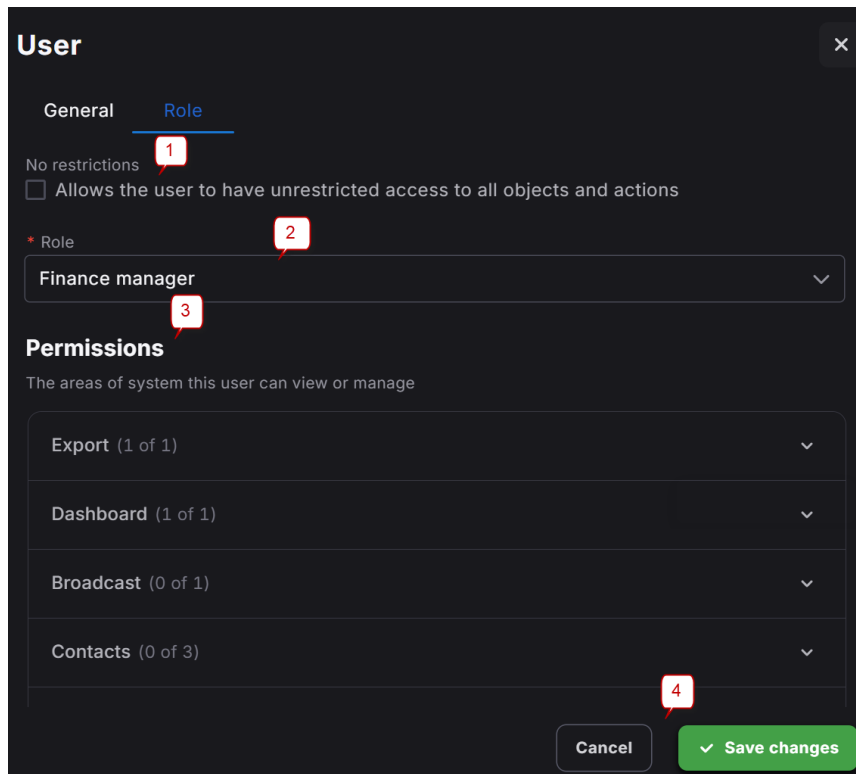
User: General

1. *First name*: provide user's first name.
2. *Last name*: specify user's last name.
3. *Middle name*: if applicable type in user's middle name.
4. *Department*: user's department within the company. Depending on the department the user belongs to, the conversations in the *Conversations* interface will be restricted/available to the user. The following departments are available by default:
 - *Admin*: administrative department can access all conversations.
 - *First line support*: technical support department deals with all new conversations.

NOTE: To create a new department, enter a unique value in the *Department* field and click *Create new* + Create new button that appears. New departments are created by an *Admin* user.

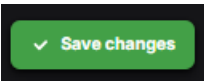
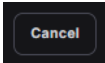
5. *Language*: select interface language (English or Spansih)
6. *Login*: provide user's login.
7. *Password*: provide user's password.
8. *E-mail*: specify user's e-mail.
9. *Contact phone*: specify user's contact phone.
10. Toggle the switch to enable Two Factor Authentication.
11. Switch to activate the user.

12. Click *Save changes*  to save the settings or *Cancel*  to discard the changes.




User: Roles

1. *No restrictions*: select to assign the *Admin* role (which has no restrictions) to the user.
2. *Role*: select available role that will be assigned to the user.
3. *Permissions*: list of permissions that are included in the selected roles.

4. Click *Save changes*  to save the settings or *Cancel*  to discard the changes.

NOTE: Once a role is added to a user, that user must log out and log in for the role to take effect.

13.3 Editing user records

To edit a record, click  next to it.

User

×
General Role 1
* First name: Lilly * Last name: Johnson
Middle name: Elizabeth
* Department: First line support
* Language: English
* Login: lillygirl Password:
* E-mail: lilly@abc.com Contact phone: 12345668990
 Two Factor Authentication
 Enabled
Cancel Delete Save changes

Editing user record: General

In the form that appears:

1. Edit general user properties as appropriate and proceed to the role.

User
✕

General
Role

No restrictions

Allows the user to have unrestricted access to all objects and actions 1

* Role

Broadcast manager
▾

Permissions

The areas of system this user can view or manage

Export (0 of 1) ▾

Dashboard (1 of 1) ▾

Broadcast (1 of 1) ▾

Contacts (3 of 3) ▾
2

Cancel

✕ Delete

✓ Save changes

Editing User record: Role

1. Edit user role as appropriate.

2. Click *Save changes* ✓ Save changes to save the settings, *Delete* ✕ Delete to delete the record or *Cancel* Cancel to discard changes.

NOTE: Once a role is added to a user, they shall log out and log in for the role to take effect.

13.4 Roles

The *Roles* tab serves to view and configure user roles and permissions. The System implements a role model, which implies that each user is assigned a role or a set of roles that includes certain permissions. The System allows to use system roles marked with the *System* label, as well as to create new roles for users.

Users **Roles** 2 6 + New role

5 Add filter 1

3 Name ↓ 4

Name ↓	Permissions	Actions
Admin · System	Export Entities View Dashboard Manage Broadcasts +24	
Broadcast manager · System	View Dashboard Manage Broadcasts Manage Contacts +13	4
Finance manager · System	Export Entities View Dashboard Manage Payments +4	
NOC engineer · System	Export Entities View Dashboard View Chatbots +11	

Roles tab

- The table contains the following parameters:
 - Name*: role name.
 - Permissions*: permissions associated with the role.
 - Actions*: hover over the record to view the controls.
- Click to customize the display of columns.
- Click to apply sorting (descending or ascending).
- Click to edit the role, and to delete the record.
- Click to add filter.
- Click *New role* to create a new role.

13.5 Adding roles

Role ✕

* Name 1
Key Account Manager 19 / 40

Description 2
Support of key customers

Template 3
Finance manager ▼

* Permissions 4
Select the areas of system this user can view or manage

Export (1 of 1)	▼
Dashboard (1 of 1)	▼
Broadcast (0 of 1)	▼
Contacts (0 of 3)	▼

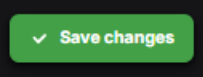
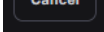
Cancel ✓ Save changes

New role

1. *Name*: specify the name of the role.
2. *Description*: provide role description.
3. *Template*: template role, used to create a new role. When selected, the permissions section is filled in automatically. The following System roles are available by default:
 - *Admin*: user with full access to all interfaces and System functionality.
 - *Broadcast manager*: user that manages broadcasts.
 - *Finance manager*: user that is in charge of financial transactions.
 - *NOC engineer*: user that monitors, maintains and supports the System.

NOTE: Custom role can be selected as a template role as well.

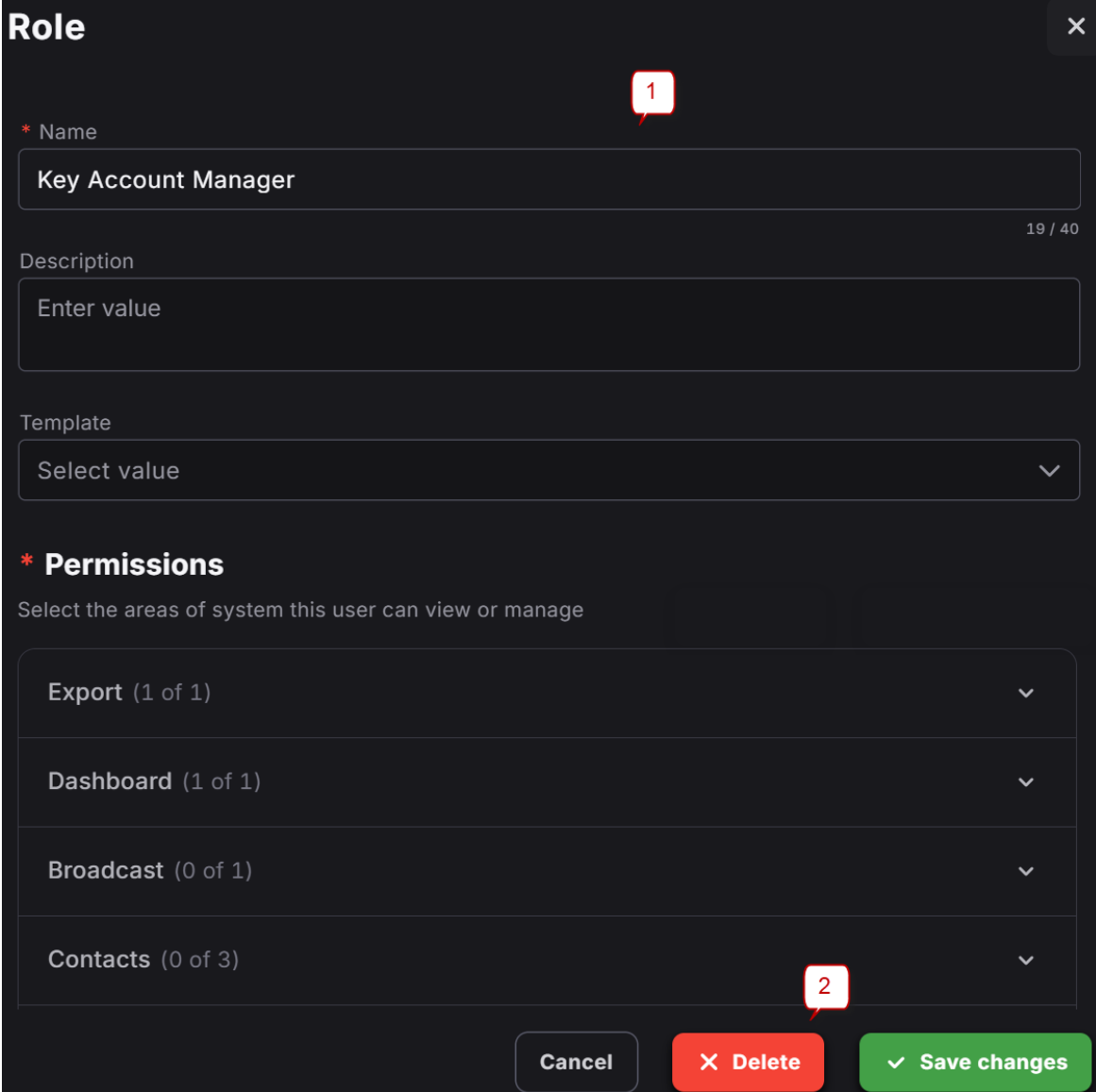
4. *Permissions*: section with the permissions that will be assigned to the user role.

5. Click *Save changes*  to save the settings or *Cancel*  to discard the changes.

13.6 Editing roles

To edit a role, click  next to it.

NOTE: System roles are not editable.

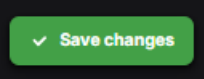
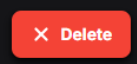
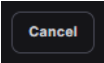


The screenshot shows a dark-themed 'Role' editing form. At the top left is the title 'Role' and a close button 'X'. A red callout box with the number '1' points to the 'Name' field, which contains 'Key Account Manager' and has a character count of '19 / 40'. Below it is a 'Description' field with the placeholder 'Enter value'. The 'Template' field is a dropdown menu with 'Select value' and a downward arrow. A section titled '* Permissions' follows, with the instruction 'Select the areas of system this user can view or manage'. It contains four rows, each with a label and a dropdown arrow: 'Export (1 of 1)', 'Dashboard (1 of 1)', 'Broadcast (0 of 1)', and 'Contacts (0 of 3)'. A red callout box with the number '2' points to the 'Delete' button at the bottom right. The bottom of the form has three buttons: 'Cancel', 'X Delete', and '✓ Save changes'.

Editing role

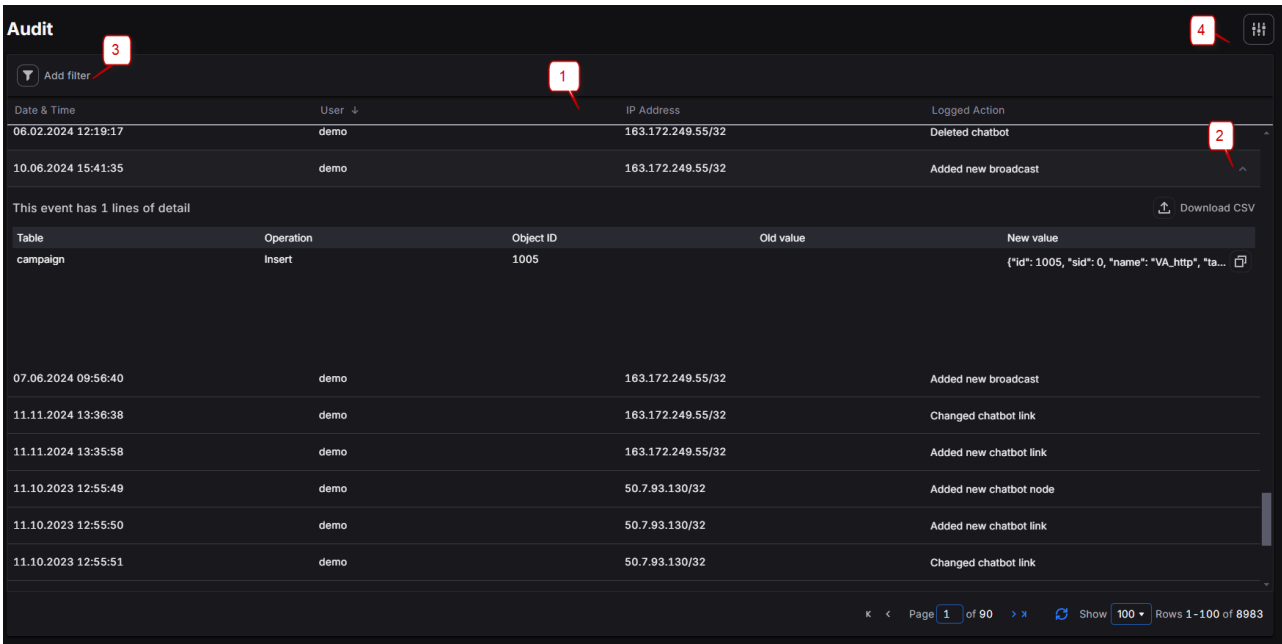
In the form that appears:

1. Edit role as appropriate.

2. Click *Save changes*  to save the settings, *Delete*  to delete the record or *Cancel*  to discard changes.

14 Audit

Audit is the activity log of System users.



The screenshot shows the Audit interface with the following elements:

- 1**: A dropdown arrow next to the 'Add filter' button.
- 2**: A dropdown arrow next to the 'Deleted chatbot' action in the first row of the table.
- 3**: The 'Add filter' button.
- 4**: A hamburger menu icon in the top right corner.

Date & Time	User	IP Address	Logged Action
06.02.2024 12:19:17	demo	163.172.249.55/32	Deleted chatbot
10.06.2024 15:41:35	demo	163.172.249.55/32	Added new broadcast

This event has 1 lines of detail

Table	Operation	Object ID	Old value	New value
campaign	Insert	1005		{"id": 1005, "sid": 0, "name": "VA_http", "ta..."}

07.06.2024 09:56:40 demo 163.172.249.55/32 Added new broadcast

11.11.2024 13:36:38 demo 163.172.249.55/32 Changed chatbot link

11.11.2024 13:35:58 demo 163.172.249.55/32 Added new chatbot link

11.10.2023 12:55:49 demo 50.7.93.130/32 Added new chatbot node

11.10.2023 12:55:50 demo 50.7.93.130/32 Added new chatbot link

11.10.2023 12:55:51 demo 50.7.93.130/32 Changed chatbot link

Page 1 of 90 Show 100 Rows 1-100 of 8983

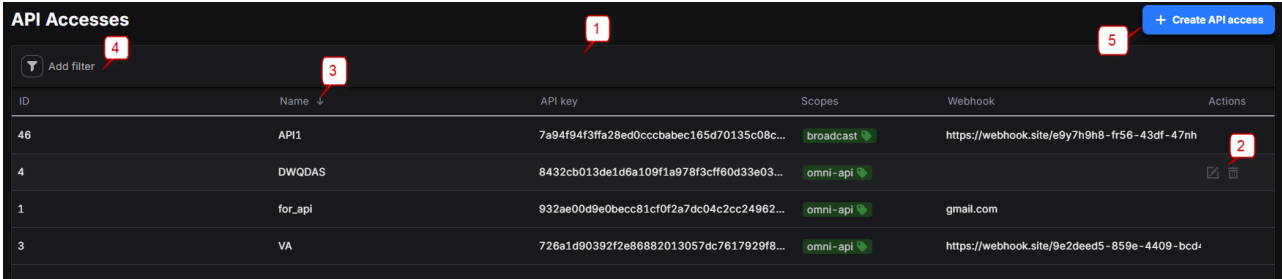
Audit

- The table contains the following parameters:
 - Date and time.*
 - User.*
 - IP address.*
 - Logged action.*
- Click to see the details and download CSV.
- Click to add filter.
- Click to customize the display of columns.

NOTE: It is important that each Client portal user has their own login credentials. Otherwise it may be problematic to track user activity to a specific person.



15 API Accesses

The *API Accesses* interface serves to generate API keys to enable interconnection with third-party systems - for example, for message sending.

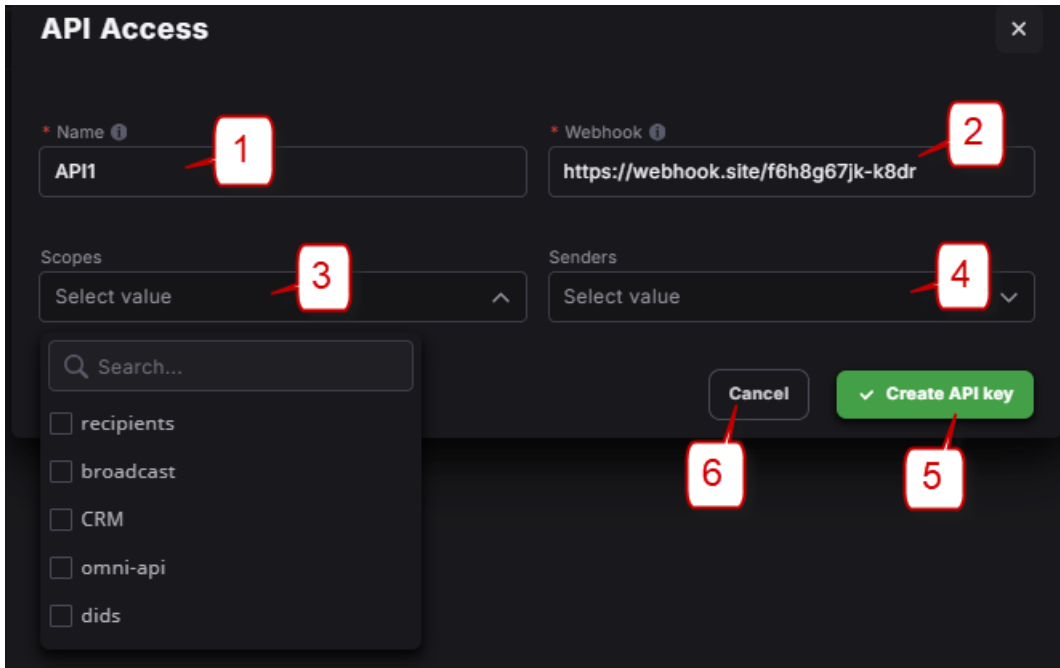


ID	Name	API key	Scopes	Webhook	Actions
46	API1	7a94f94f3ffa28ed0cccabec165d70135c08c...	broadcast	https://webhook.site/e9y7h9h8-fr56-43df-47nh	
4	DWQDAS	8432cb013de1d6a109f1a978f3cff60d33e03...	omni-api		[Edit] [Delete]
1	for_api	932ae00d9e0becc81cf0f2a7dc04c2cc24962...	omni-api	gmail.com	
3	VA	726a1d90392f2e86882013057dc7617929f8...	omni-api	https://webhook.site/9e2deed5-859e-4409-bcd4	

API Accesses

- The table contains the following parameters:
 - ID: the System identifier.
 - Name*: The name of access permission. Under this name you will be able to see the statistics on sending codes in reports.
 - API key*: is a code used to identify an application or user and is used for authentication in computer applications.
 - Scopes*: Available access scopes. Possible values are *Recipients*, *Broadcasts*, *CRM*, *omni-api*.
 - Webhook*: URL to which statuses and response messages will be sent.
 - Actions*: Hover over the record to view the controls.
- Click  to edit the record or  to delete the record.
- Click to apply sorting.
- Click to add filter.
- Click *Create API access* to generate a new API key.

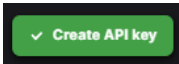
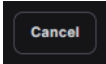
15.1 API key generation



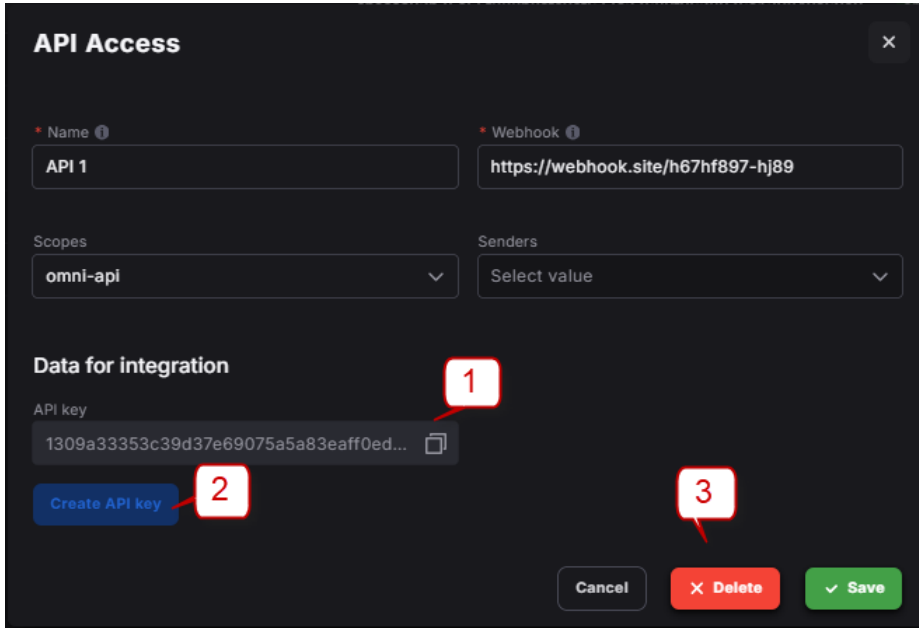
The screenshot shows the 'API Access' form with the following fields and controls:

- 1**: Name field containing 'API1'.
- 2**: Webhook field containing 'https://webhook.site/f6h8g67jk-k8dr'.
- 3**: Scopes dropdown menu showing options: recipients, broadcast, CRM, omni-api, and dids.
- 4**: Senders dropdown menu.
- 5**: 'Create API key' button (green).
- 6**: 'Cancel' button (grey).


API key generation

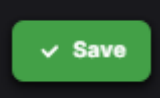
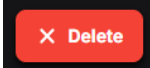
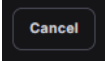
1. *Name*: enter the API key name to be displayed in the table.
2. *Webhook*: provide a URL to which statuses and responses to messages will be sent.
3. Select *Scopes*.
4. Select *Senders*.
5. Click *Create API key*  to generate a key. The key will appear in the window as shown below.
6. Click *Cancel*  to discard changes.

15.2 API key



API key

1. Click  to copy the API key to the clipboard.
2. Click *Create API key* to generate a new key.

3. Click *Save changes*  to save the template, *Delete*  to delete the record or *Cancel*  to discard changes.

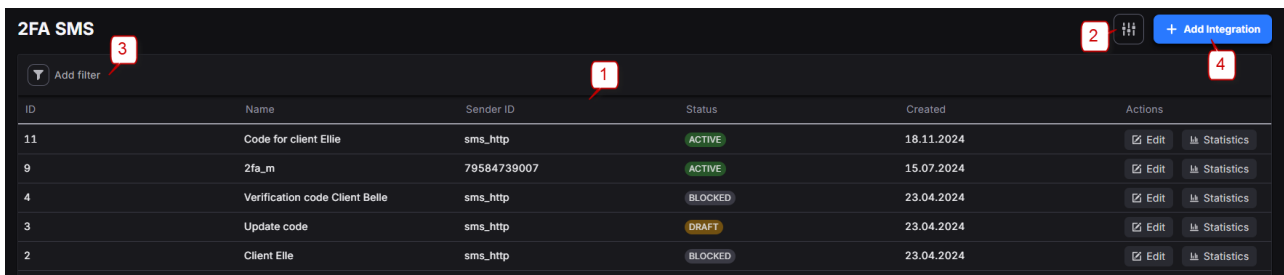
16 2FA service

The *2FA service* interface serves to configure two-factor authentication services that the System owner can offer its clients (System users). Such two-factor authorization can be integrated in client websites, portals and other services.

NOTE: For the setup and authorization of the two-factor authentication in the System, contact the technical support team of your System supplier.

16.1 2FA SMS

The *2FA service* 2FA SMS interface serves to configure two-factor authorization by SMS.



ID	Name	Sender ID	Status	Created	Actions
11	Code for client Ellie	sms_http	ACTIVE	18.11.2024	Edit Statistics
9	2fa_m	79584739007	ACTIVE	15.07.2024	Edit Statistics
4	Verification code Client Belle	sms_http	BLOCKED	23.04.2024	Edit Statistics
3	Update code	sms_http	DRAFT	23.04.2024	Edit Statistics
2	Client Elle	sms_http	BLOCKED	23.04.2024	Edit Statistics

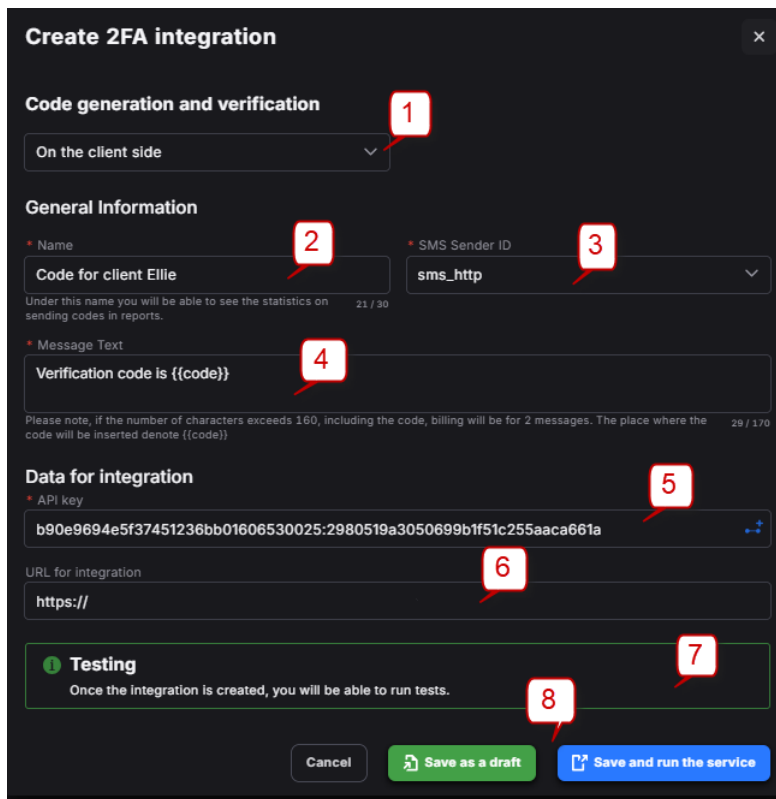
Two-factor authentication

1. The table contains the following parameters:
 - a. *ID*: the record ID in the System.
 - b. *Name*: the record name.
 - c. *Sender ID*: the sender ID that is used for sending SMS messages with authentication codes.
 - d. *Status*: record status. Possible values include:
 - i. *Active*: the record is operative.
 - ii. *Draft*: the record is not activated.
 - iii. *Blocked*: the record is blocked.
 - e. *Created*: the record creation date.
 - f. *Actions*: contains the *Edit* and *Statistic* buttons explained in [Editing a new 2FA integration](#)^[192] and [Viewing statistics on 2FA messages](#)^[193] below.
2. Click *Custom view* to customize the display of columns.
3. Click to add filter.
4. Click *Add Integration* to add a new 2FA integration record.

NOTE: 2FA Messaging API Workflow is detailed in [Appendix 3](#).^[205]

16.1.1 Adding a new 2FA integration (SMS)

Click *Add Integration* and proceed as follows.

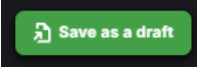
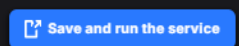



The screenshot shows a 'Create 2FA integration' form with the following sections and callouts:

- Code generation and verification** (1): A dropdown menu set to 'On the client side'.
- General Information**
 - Name** (2): A text input field containing 'Code for client Ellie'.
 - SMS Sender ID** (3): A dropdown menu set to 'sms_http'.
 - Message Text** (4): A text input field containing 'Verification code is {{code}}'.
- Data for integration**
 - API key** (5): A text input field containing a long alphanumeric string.
 - URL for integration** (6): A text input field containing 'https://'.
- Testing** (7): A section with a green header and a note: 'Once the integration is created, you will be able to run tests.' (8)

At the bottom of the form are three buttons: 'Cancel', 'Save as a draft', and 'Save and run the service'.

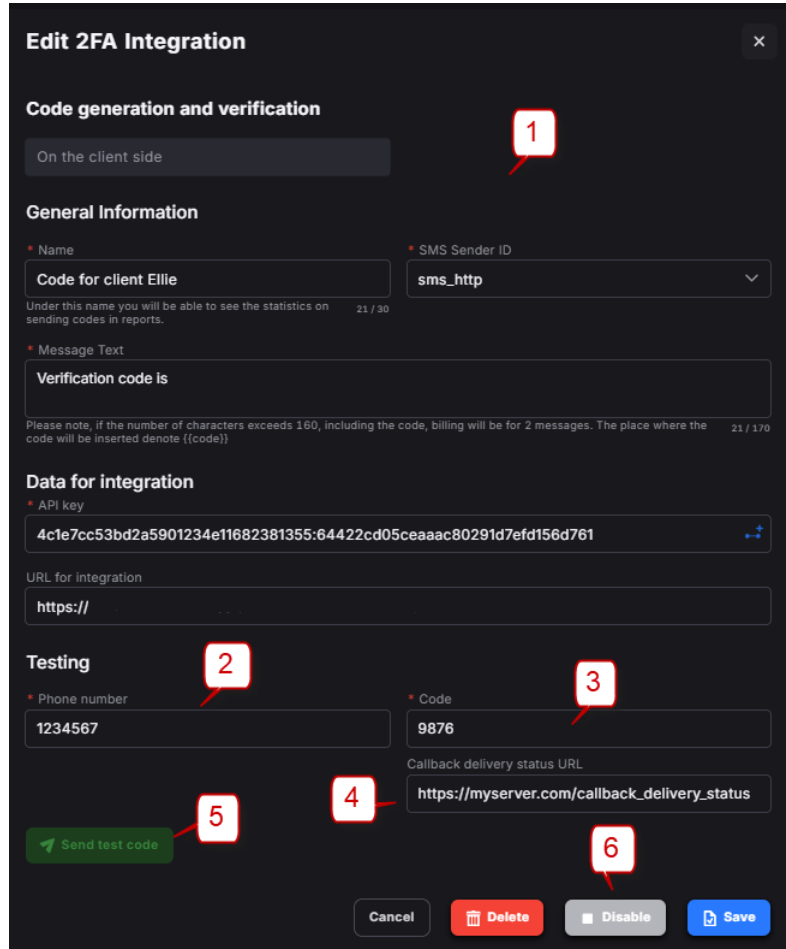
Create 2FA integration (Part 1)

1. *Code generation and verification*: select on which side the code will be generated and verified. Possible values include:
 - a. *On the platform side*: the code is generated and verified by the System.
 - b. *On the client side*: the code is generated and verified on the side of the website\service.
2. *Name*: enter the record name.
3. *SMS Sender ID*: select the Sender ID that will be used for sending SMS messages with authentication codes.
4. *Message text*: text of the message in which the code is sent. The code placeholder must be specified as {{code}}.
5. *Data for integration: API key*. Click to generate the API key for integration.
6. *Data for integration: URL for integration*.
7. *Testing*: once the integration is created you will be able to run tests.
8. Click *Save as a draft*  to save the record in the System, the record will have the status *Draft*. Click *Save and run the service*  to make the record operative, the record will have the status *Active*. Click *Cancel*  to discard the changes.

NOTE: Once the integration is created, you will be able to run tests.

16.1.2 Editing a 2FA integration

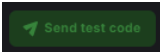

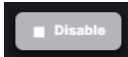
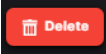

To edit a record, click *Edit* in the table and proceed as follows.



The screenshot shows the 'Edit 2FA Integration' form with the following fields and callouts:

- 1:** 'Code generation and verification' section, specifically the 'On the client side' dropdown.
- 2:** 'Phone number' field in the 'Testing' section.
- 3:** 'Code' field in the 'Testing' section.
- 4:** 'Callback delivery status URL' field in the 'Testing' section.
- 5:** 'Send test code' button in the 'Testing' section.
- 6:** 'Enable' button at the bottom right of the form.

Edit 2FA integration


1. Edit the details as appropriate.
2. *Phone number*: type in the phone number that will be used for testing.
3. *Code*: type in the test code.
4. *Callback delivery status URL*: set up a callback URL to receive the delivery status of the messages.
5. Click *Send test code*  to send the test code.
6. Click *Enable*  to make the record operative (if the record was in the *Draft* or *Blocked* status). If the record was in the *Active* status, the button is replaced with *Disable*  that changes the status to *Blocked*. Click *Delete*  to remove the record. Click *Save*  to save the changes and close the form.

16.1.3 Viewing statistics on 2FA messages


Select a record in the table and click *Statistic* to view the statistics on the delivery of two-factor authentication messages for this integration.

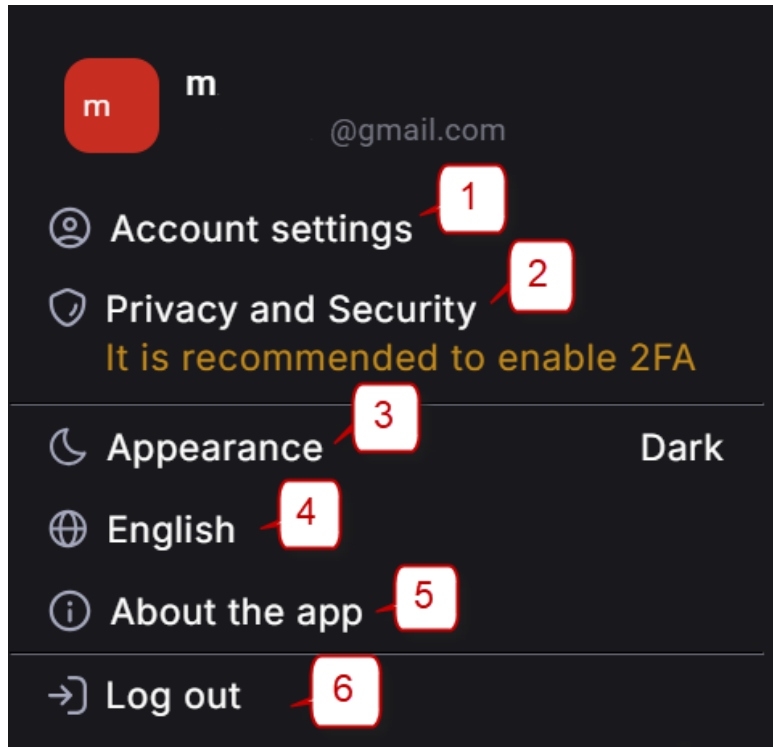


Statistics

1. Select the period for which the statistics must be displayed.
2. Select the data that must be shown. Possible values are:
 - a. *General*: sent messages, delivered messages and the average delivery time.
 - b. *By operator*: sent and delivered messages by operator.
 - c. *By country*: sent and delivered messages by country.
3. Use the slider to zoom in on a shorter timeframe within the period set in step 1.
4. Click *Download EDR* to download the EDR for the specified period.
5. Click  to refresh the chart.

17 My account

Click on the avatar  in the lower left corner of the screen to display account settings interface.



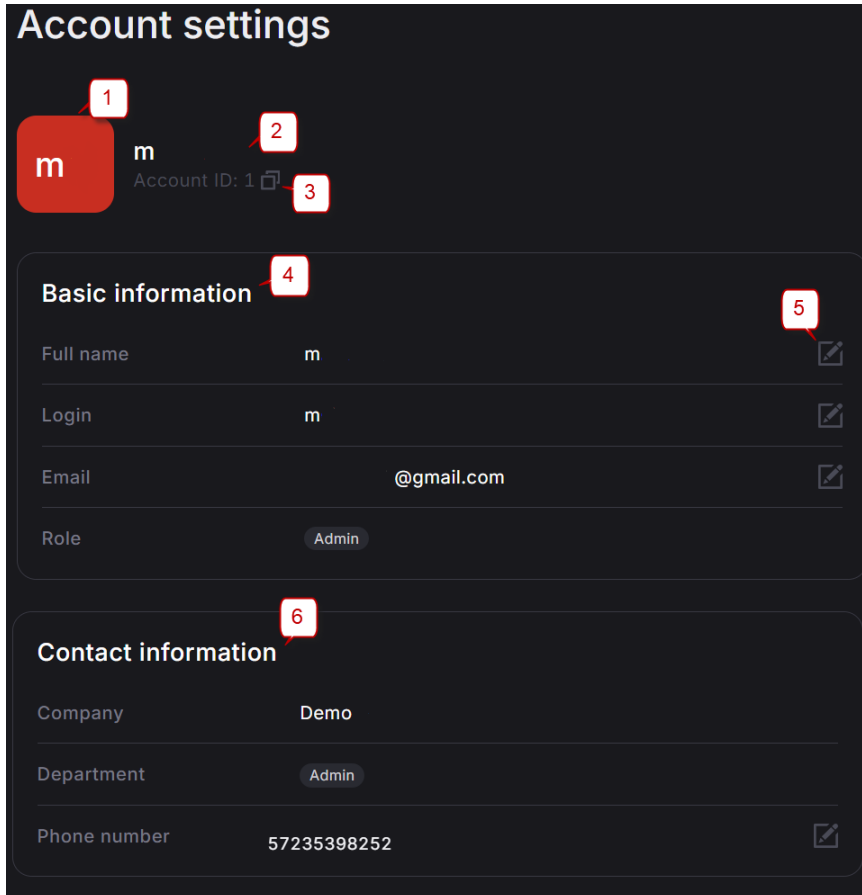
My account

It consists of:

1. *Account settings*: click to proceed to the [Account settings](#)¹⁹⁵ interface.
2. *Privacy and Security*: click to proceed to the [Privacy and Security](#)¹⁹⁶ interface.
3. *Appearance*: select the color theme. When you hover over the Appearance bar on the right, a pop-up window appears with the following themes:
 - *Light theme*.
 - *Dark theme*.
 - *System settings*.
4. *Language*: select the System language (*English* or *Español*).
5. *About the App*: click to display a brief technical summary of the System version.
6. *Log out*: click to log out of the System.

17.1 Account settings

The *Account settings* interface serves to configure parameters that store personal user information.

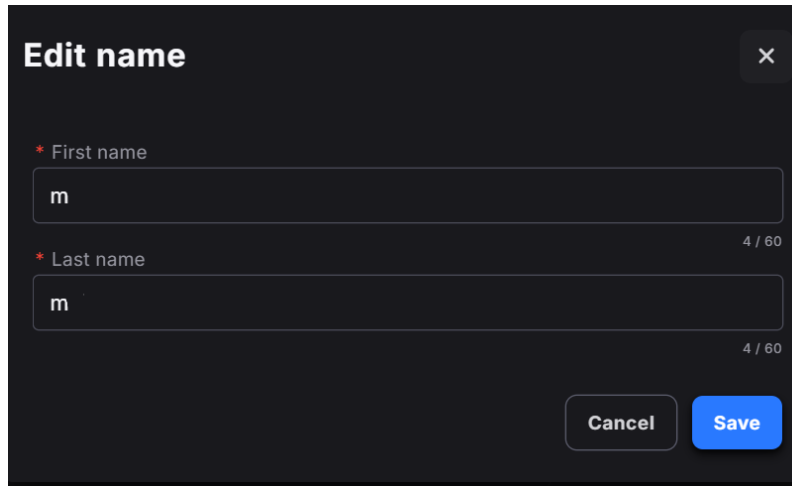


The screenshot shows the 'Account settings' interface. At the top, there is a header 'Account settings'. Below it, there is a profile section with an avatar (1), a name 'm' (2), and an 'Account ID: 1' (3). Below this is a 'Basic information' section (4) with fields for 'Full name' (m), 'Login' (m), 'Email' (@gmail.com), and 'Role' (Admin). Below that is a 'Contact information' section (6) with fields for 'Company' (Demo), 'Department' (Admin), and 'Phone number' (57235398252). Each field has an edit icon (5) to its right.

Account settings

The interface consists of the following elements:

1. *Avatar*: click on the avatar to upload a picture. If the user does not have an avatar set, the first letters of the user's first name and last name will be displayed in the avatar.
2. *Name*: user's first and last name.
3. *Account ID*: identification number of the user's account in the System.
4. *Basic information*:
 - *Full name*: user's first and last name.
 - *Login*: user's login.
 - *Email*: user's email.
 - *Role*: roles assigned to the user.
5. Click to start editing info in the form that appears:

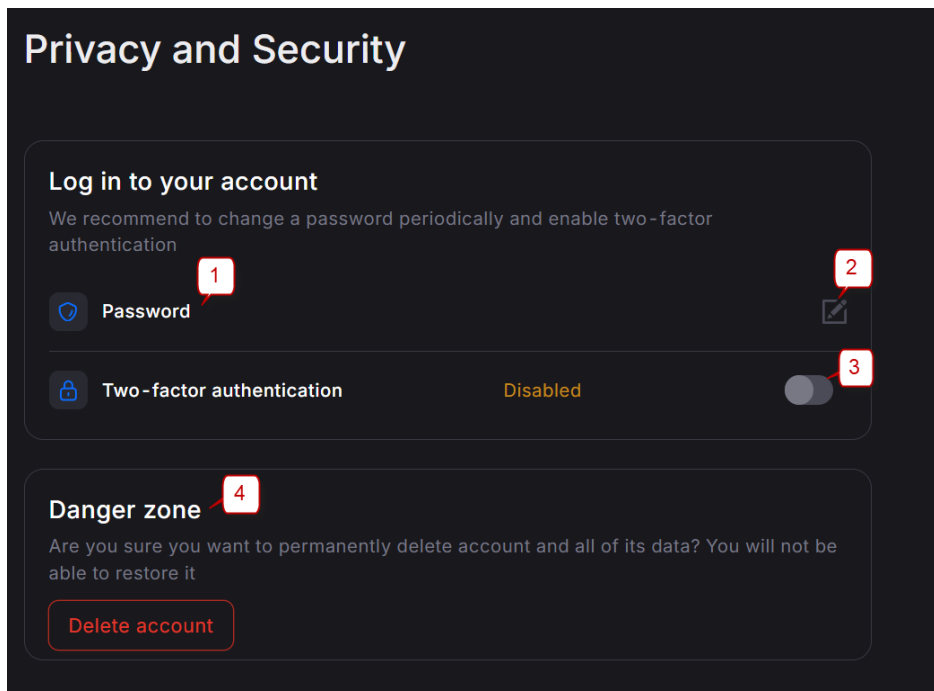


Edit form

- a. Edit the data as appropriate.
 - b. Click *Save* to save the settings or *Cancel* to discard the changes.
6. Contact information:
- *Company*: company the user is associated with.
 - *Department*: company department that the user is assigned to.
 - *Phone number*: user's contact number.

17.2 Privacy and Security

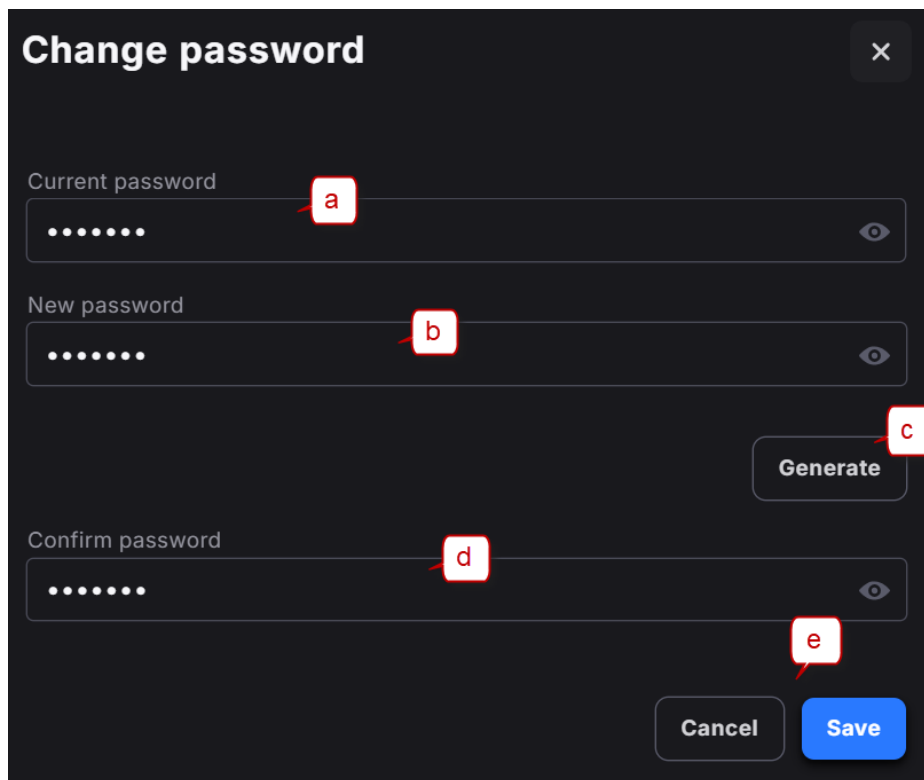
The *Privacy and Security* interface serves to configure security settings.



Privacy and Security

The interface consists of the following elements:

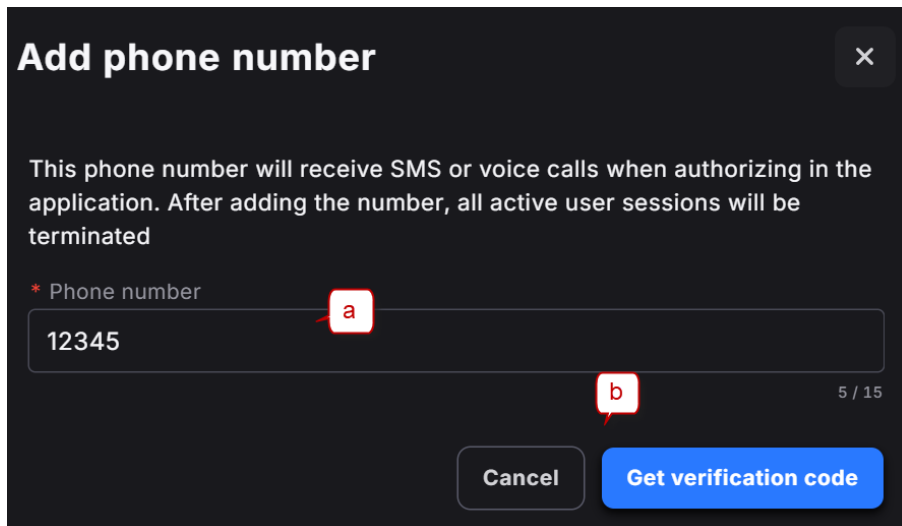
1. *Password*: user's password.
2. Click to change password.



The screenshot shows a dark-themed 'Change password' dialog box. It contains three password input fields: 'Current password', 'New password', and 'Confirm password'. Each field has a red callout box with a letter: 'a' for 'Current password', 'b' for 'New password', and 'd' for 'Confirm password'. To the right of the 'New password' field is a 'Generate' button with a red callout box 'c'. At the bottom right are 'Cancel' and 'Save' buttons, with a red callout box 'e' pointing to the 'Save' button. A close button (X) is in the top right corner.

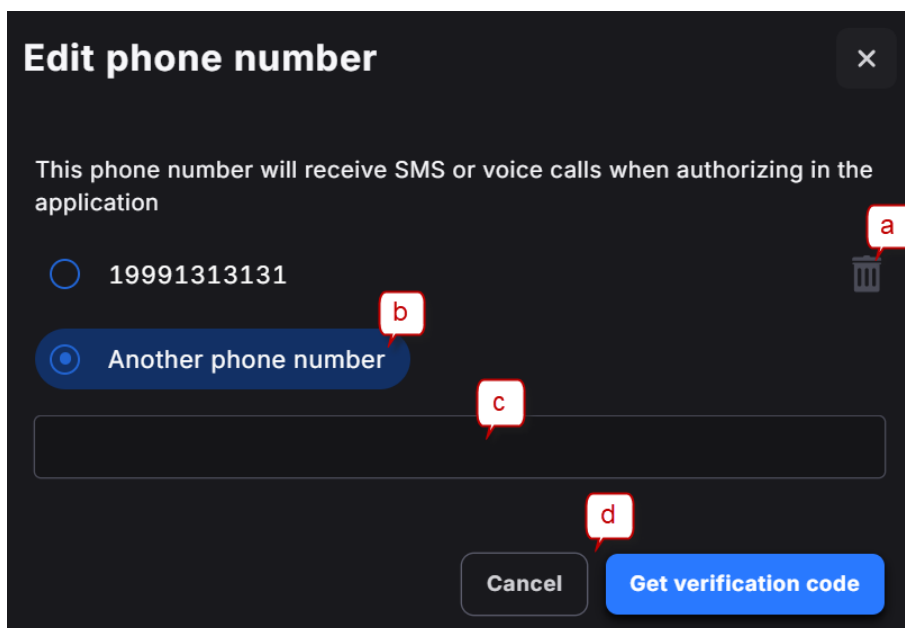
Change password

- a. *Current password*: type in the password you would like to change.
 - b. *New password*: type in your new password, or
 - c. Generate a new strong password.
 - d. *Confirm password*: confirm your new password.
 - e. Click *Save* to save the settings or *Cancel* to discard the changes.
3. Select to enable *Two-factor authentication*. Add your phone number to get verification code in the form that appears or edit phone number if the *Two-factor authentication* has already been enabled.



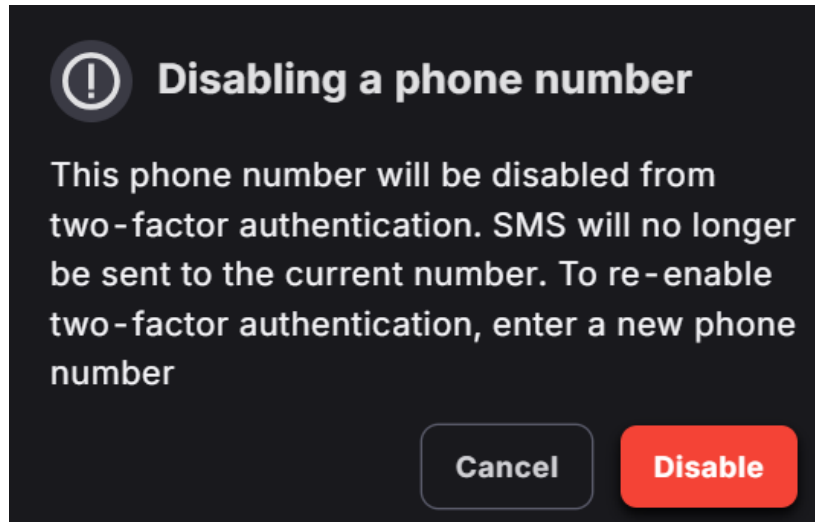
Add phone number

- a. *Phone number*: type in your phone number to get one-time verification code.
- b. Press *Get verification code* to save the phone number and get one-time code or *Cancel* to discard the settings.



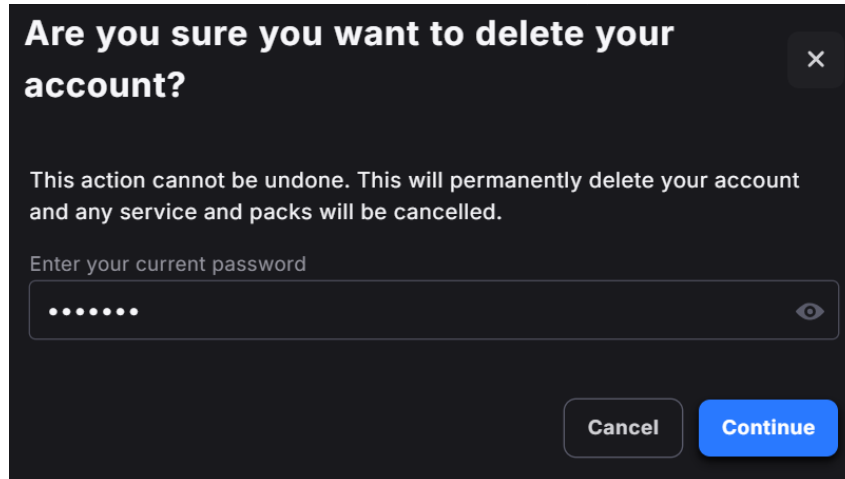
Edit phone number

- a. Click to disable the phone number from two-factor authentication. In the form that appears press *Disable* to confirm the action or *Cancel* to close the form.



Disabling a phone number

- b. Select to enter another phone number that one-time codes will be sent to.
 - c. Type in the new phone number.
 - d. Press *Get verification code* to save the phone number and get one-time code or *Cancel* to discard the settings.
4. *Danger zone*: press *Delete account* to permanently delete the account. Type in your current password In the *Delete your account* form that appears and press *Continue*.



Delete your account (1)

Type in *delete-account* in the corresponding field to confirm the deletion and press *Delete* to permanently delete your account or *Cancel* if your thought better.


Are you sure you want to delete your account? ✕

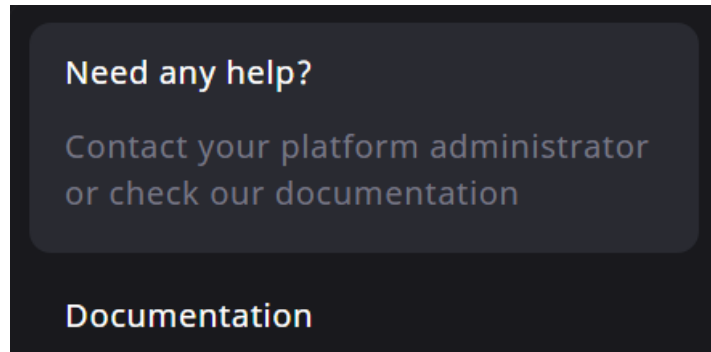
Are you sure you want to delete your account? To confirm, please type **delete-account** in the field below.

Cancel Delete

Delete your account (2)

18 Help window

Click on the  icon in the lower left corner to display the *Help* window. It serves to access the user documentation and contact the technical support team.



The Help window

The pop-up window contains the following elements and controls:

1. *Need any help?* prompt: *Contact your platform administrator or check our documentation.*
2. *Documentation*: click to access the user documentation.

19 Appendix 1. Delivery error troubleshooting guide

This section details the most common delivery errors and their troubleshooting instructions.

Error code	Error text example	Situations in which it appears	What caused the error and how to fix it
401	Error sending: Error sending RCS GSMA: error getting transit API access token: Error updating access token: Expected transit response status to be 200 OK, but got: 401, with body: <pre>{"timestamp":"2022-10-11T14:41:26.522+00:00", "status":401, "error":"Unauthorized", "path":"/rcs/v1/auth"}</pre>	When sending a message from the <i>Conversations</i> interface	Probably, an incorrect vendor URL is specified in BackOffice (transit, GRBM, Nexmo etc.) Contact the Technical support team of your System supplier to fix it.
404	Error sending: Error sending RCS GSMA: Transit status_code 404 with body: <pre>{"errorMessages": [{"message": "NOT_FOUND", "code": 404, "description": "Requested entity was not found."}], "statusCode": "404"}</pre>	When sending a message from the <i>Conversations</i> or <i>Broadcasts</i> interface	The recipient has not activated RCS on their phone. To activate it, the recipient must open the <i>Messages</i> application, go to <i>Settings</i> and check that the chat functions are enabled and the status is <i>connected</i> .
400	Error sending: Error sending RCS GRBM: Google status_code 400 (with retries=0 of 3) with body: { "error": { "code": 400, "message": "User phone number is not of a valid format.", "status": "INVALID_ARGUMENT" } }	When sending a message from the <i>Conversations</i> interface	Identify the recipient phone number. Check that the number has correct <i>Country</i> and <i>Network</i> values associated with it.
NA	Error: traffic: set sender options: sender info not found in redis	When sending a message from the <i>Conversations</i> interface	Contact the System supplier's Technical support team.
NA	SMS broadcast is IN PROGRESS but the column Channel engagement shows 0	When sending a message from the <i>Conversations\Chatbots</i> or <i>Broadcasts</i> interface	1. Check the thread in conversations searching by the recipient's phone number. If the conversations thread contains a failed message with an error, identify the error and eliminate it. If there is no failed message in the

Error code	Error text example	Situations in which it appears	What caused the error and how to fix it
	SMS. No SMS appeared in conversations.		<p>conversations thread, go to the next step.</p> <ol style="list-style-type: none"> 2. Try to send the message manually from the operator's window in the conversations thread. It is important to select the same Sender ID and keep the same channel. Check the thread if the attempt to send the message was successful. If there is a failed message in the conversations thread with an error, identify the error and eliminate it. If there is a successfully sent message in the conversations thread, go to the next step. 3. Check that you configured the scenario correctly: each scenario must begin with a start node.
NA	Traffic error: Error defining RCS mode (GRBM/GSMA): sender_id is not cached in pipeline	When sending a message from the <i>Conversations\Chatbots</i> or <i>Broadcasts</i> interface	Contact the System supplier's Technical support team.

20 Appendix 2. Password policy

To ensure the System security, the following password policy has been implemented in the Client portal interface.

1. The minimum password length is 8 symbols.
2. The password must contain at least three of the following groups of symbols: upper-case and lower-case letters, digits and special characters.
3. The current password must not coincide with at least seven previous passwords.
4. The maximum password validity period is 60 days. To change the period, contact your System owner. Once the password has expired, the user is prompted to change it before accessing the System.

NOTE: The user cannot change its own password within 24 hours after changing it. However, a System admin can change its own password and the password for a regular System user at any time.

5. Upon the first login to the System, the user is prompted to change its default password, otherwise the System cannot be accessed.
6. If a System user has not accessed the System for over 30 calendar days, its account is blocked (this does not apply to admin users). To unblock it, contact your System owner.
7. If a user has been inactive for over 60 minutes, the user is automatically logged out.

21 Appendix 3. 2FA Messaging API Workflow

The System user software is expected to utilize two different types of workflow depending on the particular 2FA integration kind used: *on the client side* or *on the platform side*.

21.1 2FA Client side integration

This type of integration implies that the System will only be used for premade message sending, OTP code generation and verification is performed by the System user software.

For OTP code message sending use the following pattern:

```
$ curl -X POST <URL for integration field value> -u <API key field value> -d number="<target user DNIS>" -d code="<OTP code>"
```

Successful response format

In case of successful processing, the status in the header of the HTTP response is 200 OK. Response body contains the requestId.

Sample of a response in JSON format:

```
HTTP/1.1 200 OK
```

```
Content-Type: application/json
```

```
{  
"requestId": "wp9RPWDGZkskBrVeTc4lgNCc4e79fc65"  
}
```

21.2 2FA Platform side integration

This type of integration implies that System user software works in tandem with the platform where System user software initiates OTP message sending to the recipient DNIS and verifies OTP code with the platform which generates OTP code and sends it to the recipient.

For OTP code message sending use the following pattern:

```
$ curl -X POST <URL for integration field value> -u <API key field value> -d number="<target user DNIS>"
```

Successful response format

In case of successful processing, the status in the header of the HTTP response is 200 OK. Response body contains the requestId.

Sample of a response in JSON format:

```
HTTP/1.1 200 OK
```

```
Content-Type: application/json
```

```
{  
"requestId": "wp9RPWDGZkskBrVeTc4lgNCc4e79fc65"  
}
```

After that the System generates OTP code locally and sends it to the recipient. Once the recipient enters received OTP code in System user software it will verify it with the System using the query in below format:

```
$ curl -X POST https://<Client portal domain name>/api/v1/2fa/verify -u <API key field value> -d  
requestId=<requestId value received at the previous step> -d code=<OTP code user input in the System user  
software >
```

Successful response format

In case of successful processing, the status in the header of the HTTP response is 200 OK. Response body contains the number and verifiedAt fields.

Response sample in JSON format:

```
HTTP/1.1 200 OK
```

```
Content-Type: application/json
```

```
{  
"number": "19602323332",  
"verifiedAt":1676444956  
}
```

21.3 Request checking

System API allows checking OTP requests based on the present requestId value. For that execute a query in below format:

```
$ curl https://<Client portal domain name>/api/v1/2fa/requests/<requestId value> -u <API key field value>
```

Successful response format

In case of successful processing, the status in the header of the HTTP response is 200 OK. Response body contains queried request related array of data.

Sample of a response in JSON format:

```
{  
"id": "<requestId value>",  
"number": "<target user DNIS>",  
"rate": 0.0248,  
"billable": null,  
"status": "SUBMIT",  
"sender": "<integration configured Sender ID>",  
"goals": ["NUMBER_VERIFIED"],  
"createdAt": 1676444893067,  
"payload":{  
"number": "<target user DNIS>"  
}  
}
```

21.4 Receiving 2FA integration callbacks

In case URL, to send the result of verification field value is specified during 2FA integration configuration, said URL will receive callbacks containing JSON array in the following format:

```
{  
  "requestId": "wp9RPWDGZkskBrVeTc4lgNCc4e79fc65",  
  "number": "19602323332",  
  "status": "SENT",  
  "timestamp": 1656666364  
  "billable": true  
}
```

"timestamp" above indicates the time of a request received by the System for which requestId was generated.

22 Appendix 4. Using Zero-Tap

This section provides instructions on how to set up Zero-Tap on the Client portal side and run WhatsApp OTP Sample App without a server.

The procedure involves the following stages:

1. Setting up and running of the official *WhatsApp OTP Sample App* to get the *Signature Hash* and *Package Name* values.
2. Creating a WhatsApp Zero-Tap *Authentication* template on the Client portal side and specifying the received *Signature Hash* and *Package Name* in it.
3. Sending test OTP through API (<host>) to check if the application automatically receives the code.

22.1 Setting up and running the app

To setup and run the app follow the steps below.

1. Get the official demo app:

Download sample code from the [official Meta website](#). The repository contains:

- Android and iOS examples;
- Node.js test server (not used in serverless mode);
- SDK implementation for Zero-Tap authorization.

2. Open the project:

- a. Open Android Studio.
- b. Select **Open** and specify the folder name: `WhatsApp-OTP-Sample-App/Android`.
- c. Wait for Gradle synchronization to complete.

3. Get App Package Name:

- a. Open the following in Android Studio:

```
app/  
  src/  
    main/  
      AndroidManifest.xml
```

- b. Find the following line at the top of the file:

```
<manifest  
  xmlns:android="http://schemas.android.com/apk/res/android"  
  package="com.whatsapp.otp.sample.app">
```

- c. Copy the package attribute value which is the App Package Name.

Sample: `com.whatsapp.otp.sample.app`

4. Get Signature Hash:

- a. Run the app on an emulator or a real device.
- b. On the start screen, under the Request OTP button, find the line:

```
Signature:  
K8a/AINcGX7
```

- c. Copy the value under the word 'Signature'. This value is the Signature Hash. Sample:
K8a/AINcGX7

22.2 Disabling server calls in the app

To run the app without a server clear all network requests.

In this mode, the app only:

- sends the code to WhatsApp;
- receives code via SDK;
- considers the code correct without server validation.

To prevent the app from accessing the server and go straight to the code entry screen, follow the steps below:

1. Open the following file:

```
app/src/main/java/com/whatsapp/otp/sample/app/otp/WhatsAppOtpIntentHandler  
.java
```

2. Find the `public void sendOtp()` method.
3. In the method you found replace part of the code as described below:

Before:

```
whatsappOtpHandler.sendOtpIntentToWhatsApp(context);  
otpService.sendOtp(phoneNumber, onSuccessHandler, onFailureHandler);
```

After:

```
whatsappOtpHandler.sendOtpIntentToWhatsApp(context);  
// Skip server call - user will send OTP manually  
WA_LOGGER.info("OTP intent sent to WhatsApp. Waiting for user to send OTP  
manually.");  
onSuccessHandler.run();
```

To simplify SDK performance testing, ensure that any OTP value is considered correct:

1. Open the following file:

```
app/src/main/java/com/whatsapp/otp/sample/app/otp/service/SampleServerOtpS  
ervice.java
```

2. Find the `public void validateOtp(...)` method.
3. In the method you found replace part of the code as described below:

Before:

```
executorServiceForNetworkRequest.submit(() -> {
    try {
        CloseableHttpResponse response = doPost(phoneNumber, code);
        int statusCode = response.getCode();
        if (statusCode == HttpStatus.SC_OK) {
            onRequestCompletedHandler.accept(OtpServiceInterface.OtpStatus.VALID);
        } else {
            onRequestCompletedHandler.accept(OtpServiceInterface.OtpStatus.INVALID);
        }
    } catch (Exception e) {
        onRequestFailureHandler.accept("Unable to validate otp");
    }
});
```

After:

```
executorServiceForNetworkRequest.submit(() -> {
    WA_LOGGER.info("Validating OTP without server - always returning VALID");
    onRequestCompletedHandler.accept(OtpServiceInterface.OtpStatus.VALID);
});
```

To prevent the app from accessing a non-existent server, perform the following steps:

1. Find the below line in the project:

```
public static final String SERVER_URL = "http://10.0.2.2:3000";
```

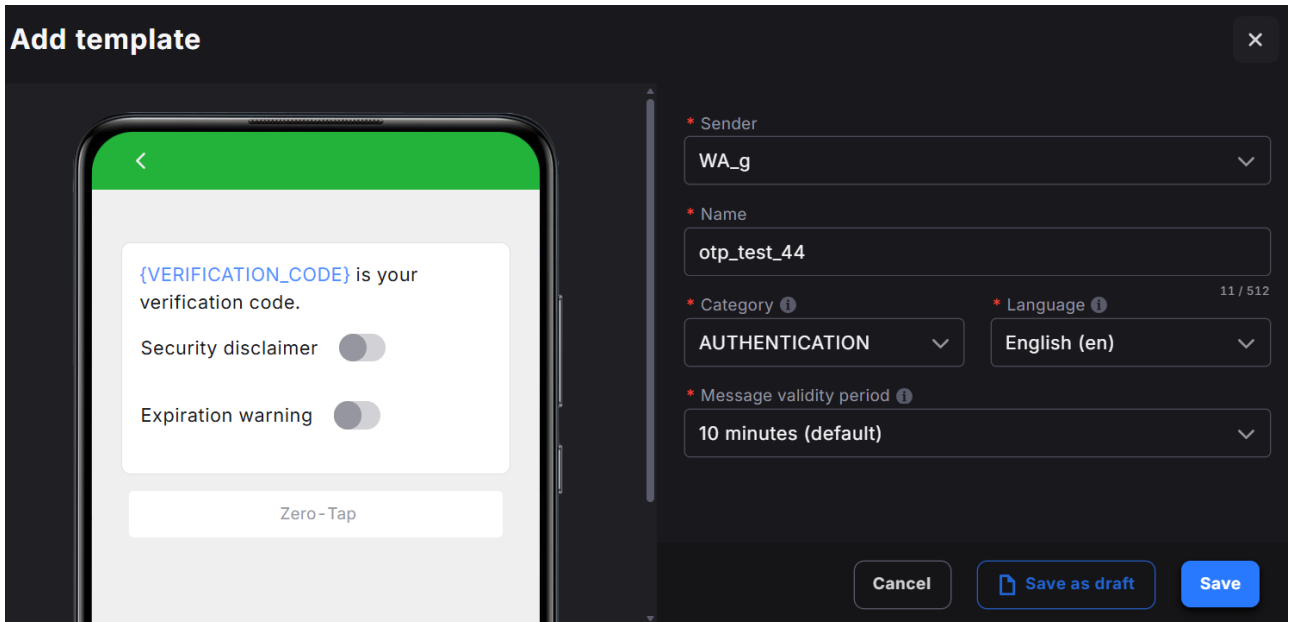
2. If this line is present, comment it out or replace it with the following line:

```
public static final String SERVER_URL = "";
```

22.3 Creating a Zero-Tap WhatsApp template in the Client portal

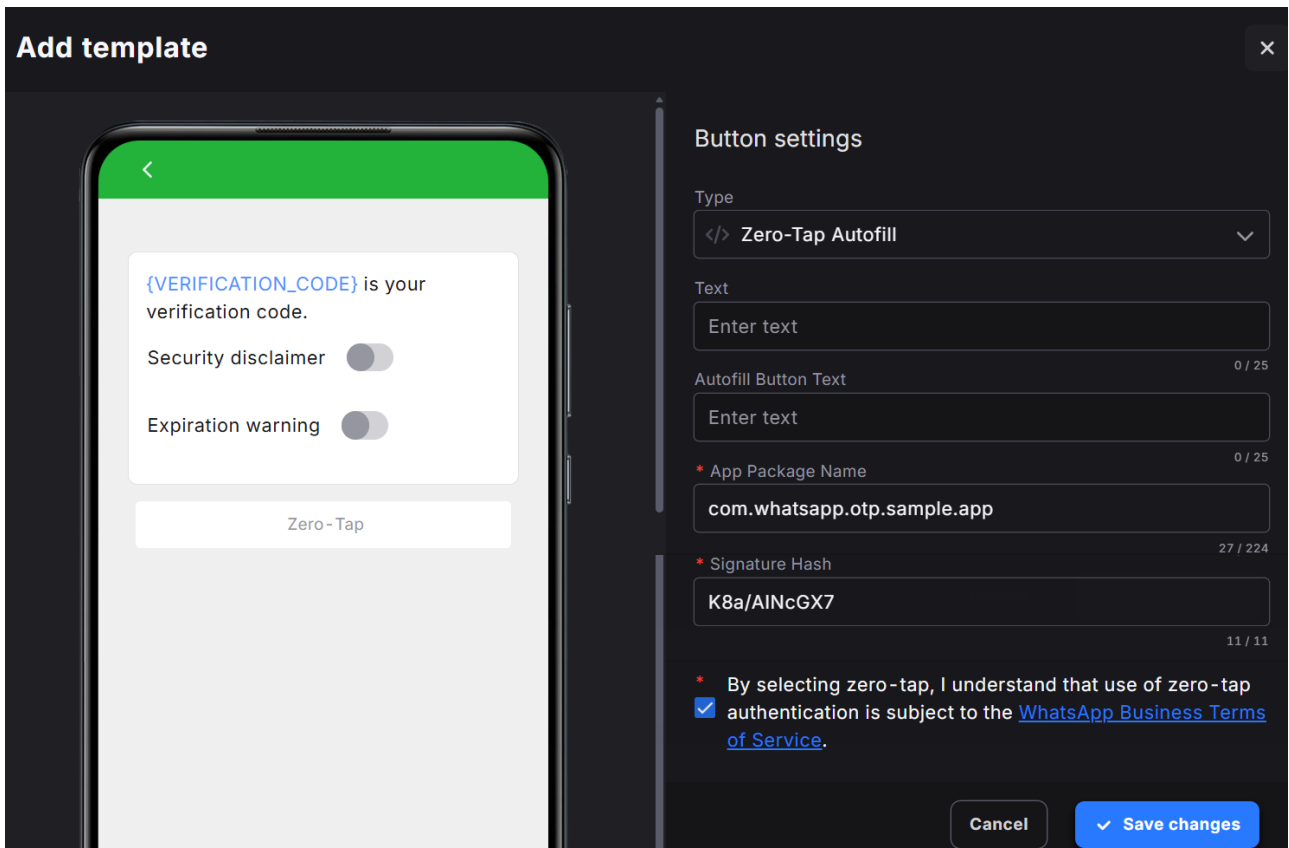
After running the app and getting the *Signature Hash*, create a Zero-Tap WhatsApp template on the Client portal side following the steps below:

1. Open the Client portal.
2. Go to the [Assets\WhatsApp templates](#) ¹⁶⁰ interface.
3. Click *New WhatsApp Template* and select *General*.



Zero-Tap Template (1)

4. Configure *Sender*, *Name*, *Language* and *Message validity period* fields.
5. Select *Authentication* for *Category*.



Zero-Tap Template (2)

6. Add a button with the Zero-Tap Autofill type.
7. Specify *App Package Name* and *Signature Hash* as detailed in [Setting up and running the app](#) ²⁰⁸.

8. Check the box to agree to WhatsApp Business Terms of Service.
9. Save the template and wait for WhatsApp approval.

Before testing the Zero-Tap workflow, make sure that:

- WhatsApp app (not Business app) is installed on the device.
- The user is logged into the WhatsApp with the phone number (account) that the OTP was sent to.
- The phone number in the request matches the phone number of the device.

22.4 Sending OTP through API

This page provides sample code to help you send OTP through API after the template is approved by Meta.

URL:

```
https://<host>/api/v1/messages
```

Method: POST

Headers:

```
Content-Type: application/json  
Authorization: Bearer <your_API_token>
```

Example request body:

```
{  
  "contact": "<recipient_number>",  
  "channel": 4,  
  "payload": {  
    "type": "template",  
    "template": {  
      "namespace": "<namespace>",  
      "language": {  
        "policy": "deterministic",  
        "code": "en"  
      },  
    },  
    "name": "<name>",  
    "components": [  
      {  
        "type": "body",  
        "parameters": [  
          { "type": "text", "text": "<otp_code>" }  
        ]  
      },  
      {  
        "type": "button",  
        "sub_type": "url",  
        "index": 0,  
        "parameters": [  
          { "type": "text", "text": "<otp_code>" }  
        ]  
      }  
    ]  
  },  
  "senderId": "<sender_number>",  
  "createRecipient": false  
}
```

22.5 Testing Zero-Tap workflow

To test Zero-Tap workflow perform the steps as detailed below:

1. Select a Zero-Tap WhatsApp template that has:
 - The *App Package Name* value matching the attribute from the `AndroidManifest.xml` file ([Setting up and running the app\Get App Package Name](#)^[208]);
 - The *Signature Hash* value matching the one displayed when the app is launched ([Setting up and running the app\Get Signature Hash](#)^[208]).
2. Send a test OTP using the selected template through API (`<host>`).
3. Make sure that WhatsApp is installed on the device and authenticated with the phone number to which the OTP was sent.
4. If everything was done correctly, the app will automatically receive the code and substitute it into the code input field.

22.6 WhatsApp Zero-Tap support guide

Full Meta documentation is available at [Zero-Tap Authentication Templates — Meta Developer Docs](#).

The document provides detailed information on:

- creating Authentication templates;
- setting up the Zero-Tap button;
- using *Package Name* and *Signature Hash*;
- automatically receiving OTP on Android.