twixor

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Welcome to Twixor EnCaps

Welcome! We are happy to have you here. To help you to use the Twixor EnCaps Platform, we've prepared this series of guides for you.

What is Twixor EnCaps?

Twixor EnCaps is a platform that makes it possible to extend your customer communication to higher grounds. With its user-friendly drag and drop Engagement Capsule designer, you can engage your customers with multi-channel marketing.

What can you do with Twixor EnCaps?

For most of the businesses, marketing campaigns are the primary method for interacting with their marketplace to strengthen their position in the customer minds, and for acquiring new customers and re-engaging their existing customers.

While most of the organizations can't spend multi-million funds to promote their products, they can make powerful and unforgettable campaigns and broadcast them across various channels like SMS, Twitter, Whatsapp, Messenger, etc.

Using Twixor, EnCaps you can design creative campaigns, use various media, and track successful results in a matter of seconds.

You can also:

• Store, Create, Update, and Launch your campaigns without trouble

• Customize your campaign workflows with simple drag and drop feature

• Broadcast your campaigns through multiple channels to reach your customers

Who can use Twixor EnCaps?

Any business across any sector who want to design successful and cost-effective campaigns to hit their marketing goals with high ROI can use **Twixor EnCaps**.

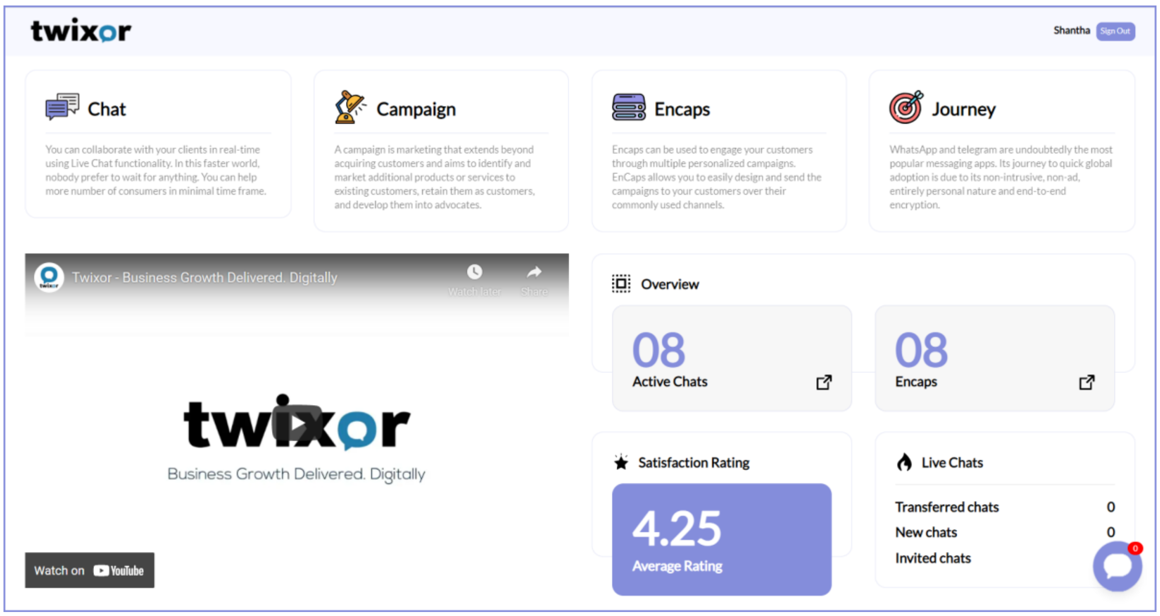
• Small to Medium businesses who want to overtake their competitors, while staying within their budget.

• Large companies who wish to attain higher loyalties and engagements from existent customers.

Dashboard

A dashboard used for enterprise is a visual display of key metrics and trends for records in your organizations.

Twixor EnCaps integrates an awesome dashboard to monitor chat activity and this can be viewed by any user registered with the enterprise.



Dashboard Components

In theory, all the components of the dashboard tell a coherent story to the users, which they can act on. Below listed are the elements contained in Twixor's Dashboard.

Chats

You can collaborate with your clients in real-time using Live Chat functionality. In this faster world, nobody prefer to wait for anything. So, by using this widget you can make the consumers to purchase your product proactively by providing instant response to their problems.

Campaign

In Campaign module, you can use the approved message templates to create a campaign, it is a strong resource for sharing important and timely notifications about your product updates.

Encaps

A campaign is marketing that extends beyond acquiring customers and aims to identify and market additional products or services to existing customers, retain them as customers, and develop them into advocates.

Journey

WhatsApp is undoubtedly one of the most popular messaging apps globally. Its journey to quick global adoption is due to its non-intrusive, non-ad, and entirely personal nature. With the addition of end-to-end encryption, business messaging is as secure as it gets with WhatsApp Business API.

Active Chats

Presents the total number of chats attended by the agents.

Satisfaction Rating

You can ask your customers to rate their satisfaction for the chat support service by star rating.

Live Chats

Displays the total number of chats transferred, new chats and invited chats attended by the agents.

Using this data, you can improve your chat activity so as to provide fabulous chat support for your customers.

Live Agent Chat

Twixor EnCaps allows you to chat in **Progressive Web App**.

What's the inner dig?

You can collaborate with your clients in real-time using Live Chat functionality. In this faster world, nobody prefer to wait for anything. So, by using this widget you can make the consumers to purchase your product proactively by providing instant response to their problems. In addition to that, you can help more number of consumers in minimal time frame, and hence the ecstasy will be scattered around.

Relish the Customers

You can engross the enterprise customers using Live Chat functionality, that lets the technical support representative to:

- Positively involve with clients throughout and after they purchase your products/services
- Interact with clients rapidly and instantaneously
- Outreach using chat for instant support
- Analyze the browsing history of clients to offer assistance

Subsequent Phases

Using live chat, it is possible to anticipate consumer needs and in turn you can enhance the overall customer satisfaction.

> **Info!** Live Chat can be enabled in **Manage Users** page

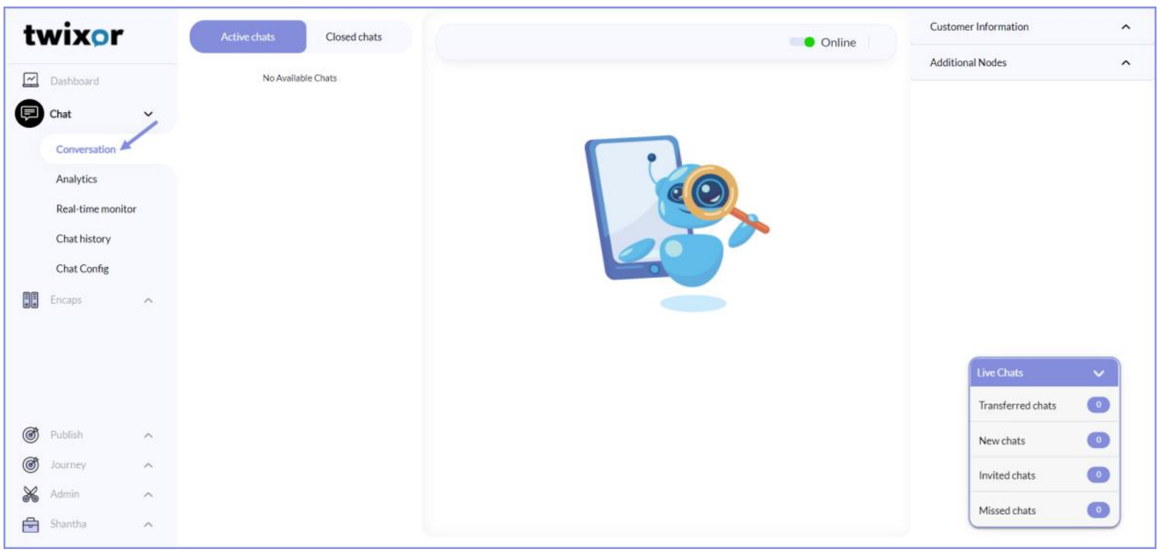
Chat Interface

With Twixor EnCaps's Progressive live chat, you can talk with your consumers from any place. Start chatting with your clients by using the chat interface and change them into your promoter.

It won't let you worry about any jumble and allows you to concentrate only on customers and conversations. Twixor's chat functionality aids you to solve cases better.

The interface is designed in such a way that it allows you to chat with several customers even if you are busy with other activities. Your work can be made easier using Artificial Intelligence-powered with actionable click buttons for conversational messaging.

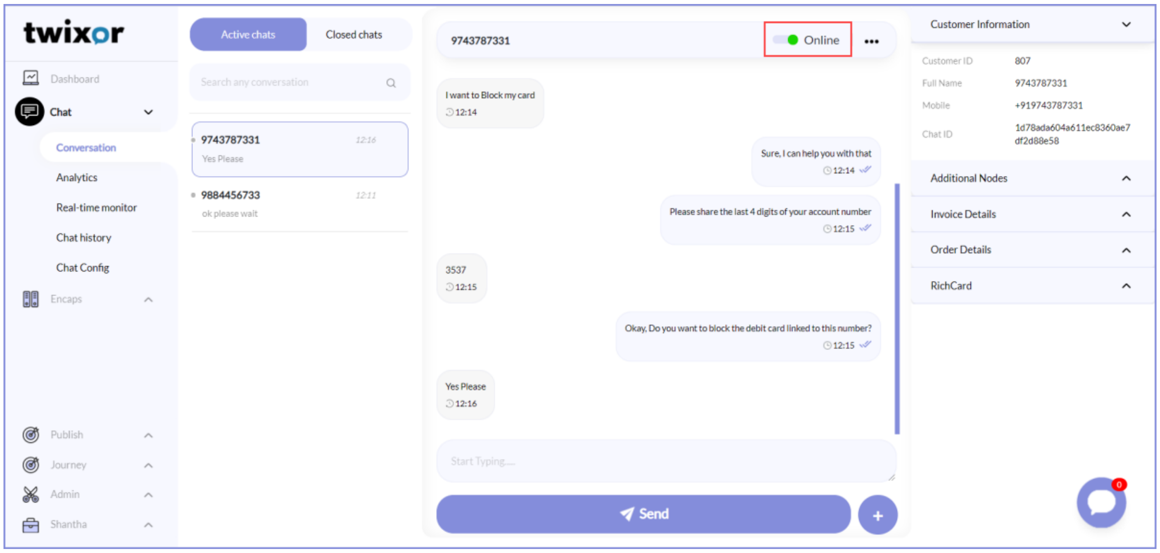
Below shown is the chat interface of Twixor EnCaps.



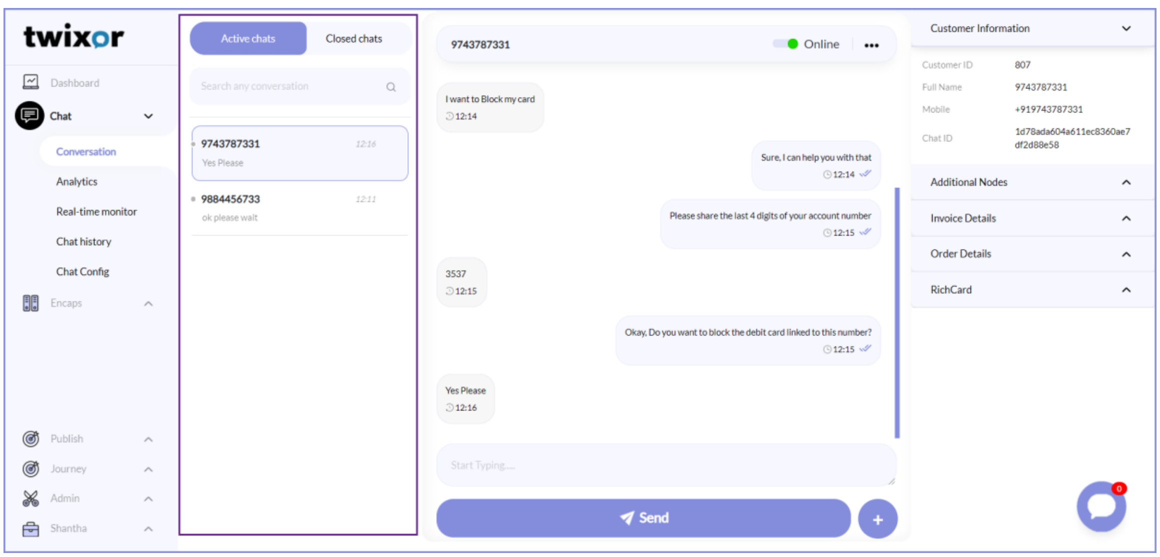
Use the Chat interface through these steps:

1. Navigate to Chats -> Conversation.

2. Enable Toggle button **(Online)** to accept chats or disable it, **(Offline)** if you don't want to receive chats.

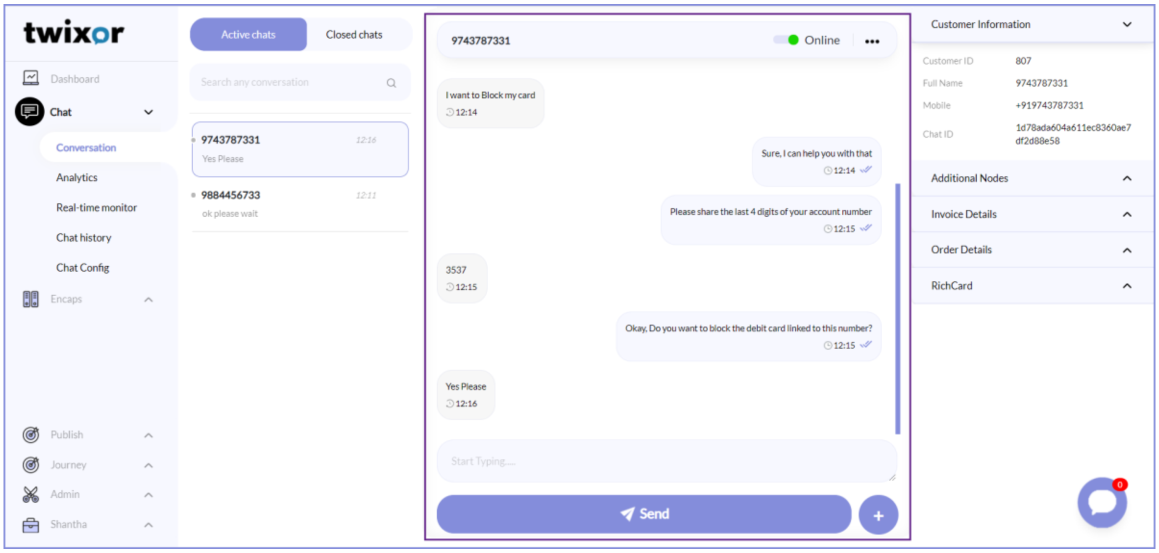


3. The customer's conversations will be available in the left pane of the Chat Interface.



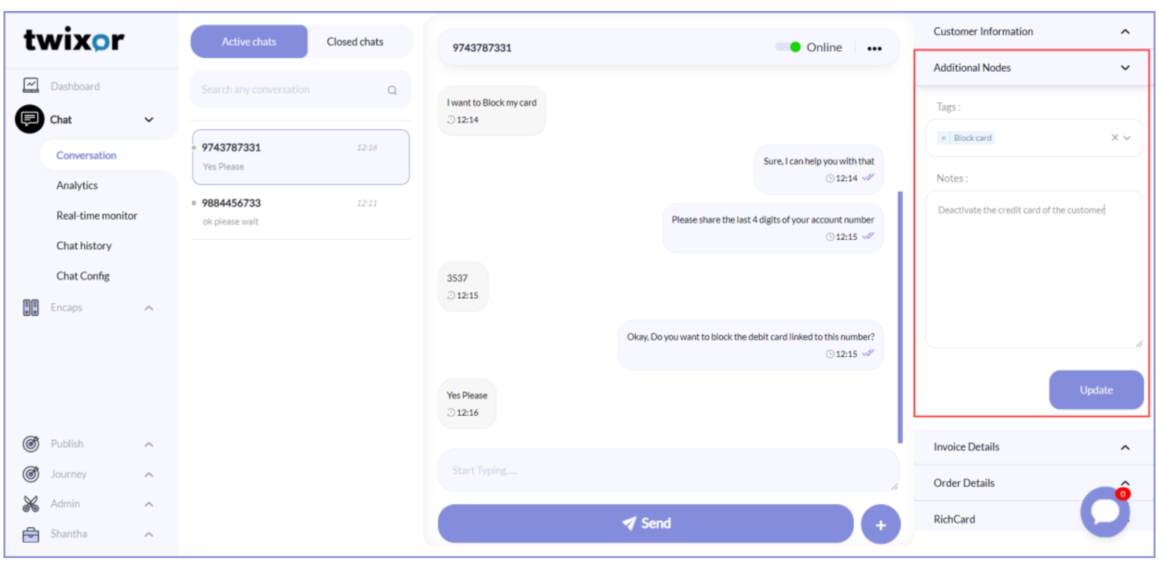
Info! "No Available Chats" message will be displayed if none of the customers are available for chat

4. In the left section of this interface, click on the respective chat to respond to the corresponding conversation. Then enter the response in **Start Typing** in the middle section and click **Send**.



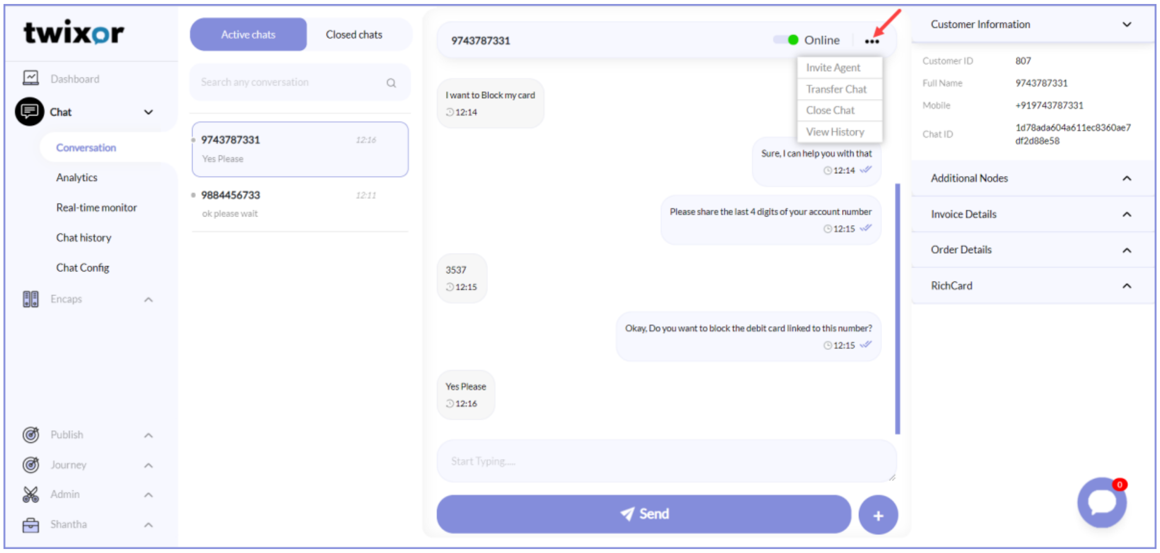
5. In the right panel of the interface, Customer information (Customer ID, Full Name, Mobile number and Chat ID), Invoice details, Order Details and Rich card details will be displayed.

In **Additional notes**, select the tag name or marker for the customer in **Tags** and type the description in **Notes**. In the example given above, if the customer is a potential client, the agent handling the chat can **tag** this customer as "Prospective Customer" so that the other agents can view the important details of the customer when they chat with them in future. A detailed description of the tag can be provided in **Notes**.

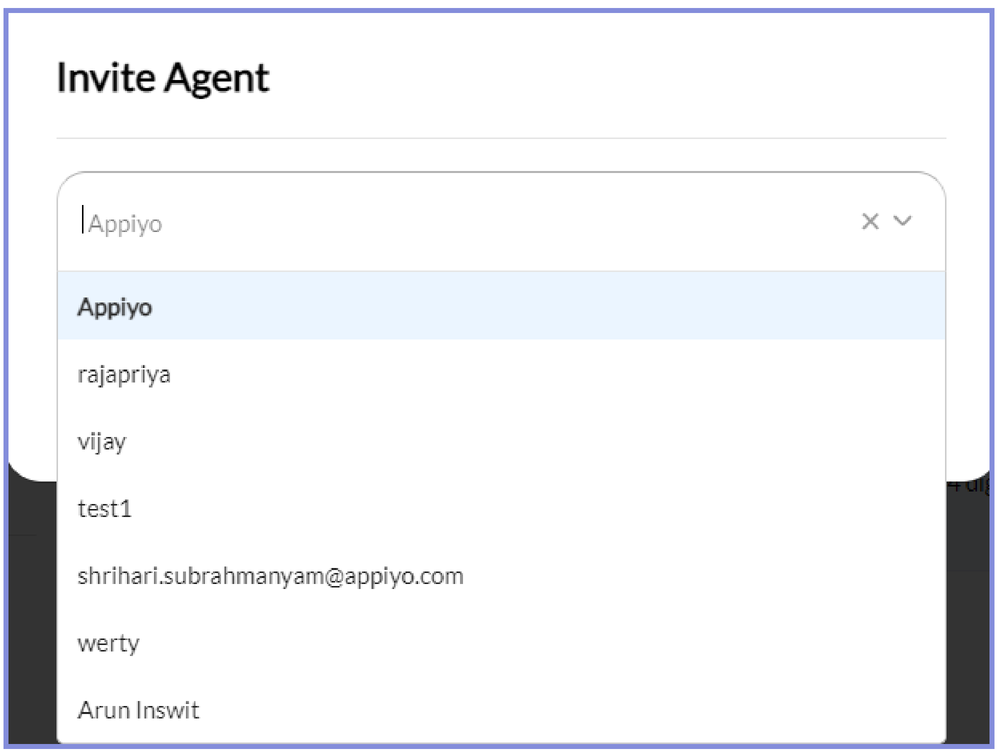


Info! The **Tag name** given here can be used to search the customer in **Chat History**

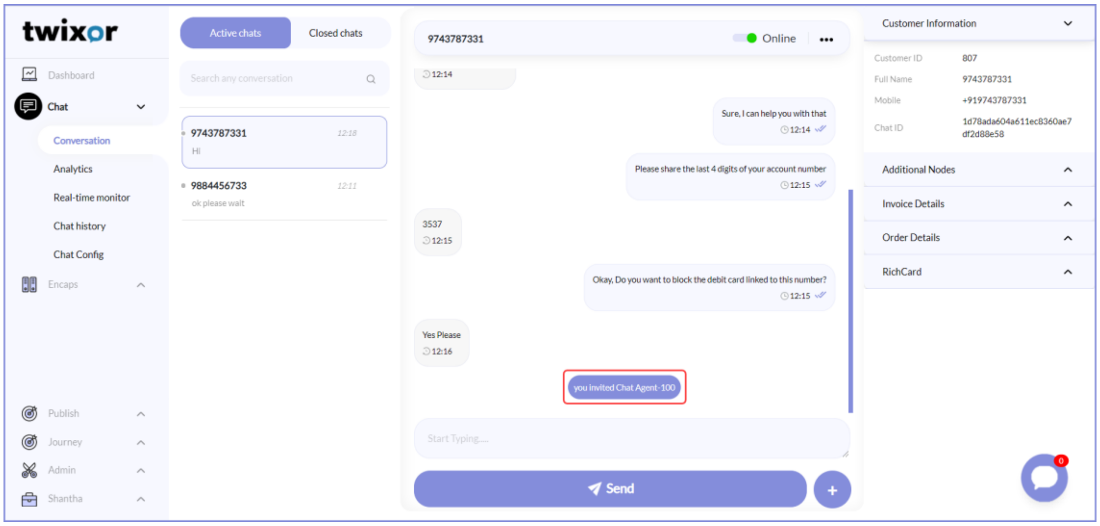
6. Click option next to Online or Offline status to view additional chat provisions.



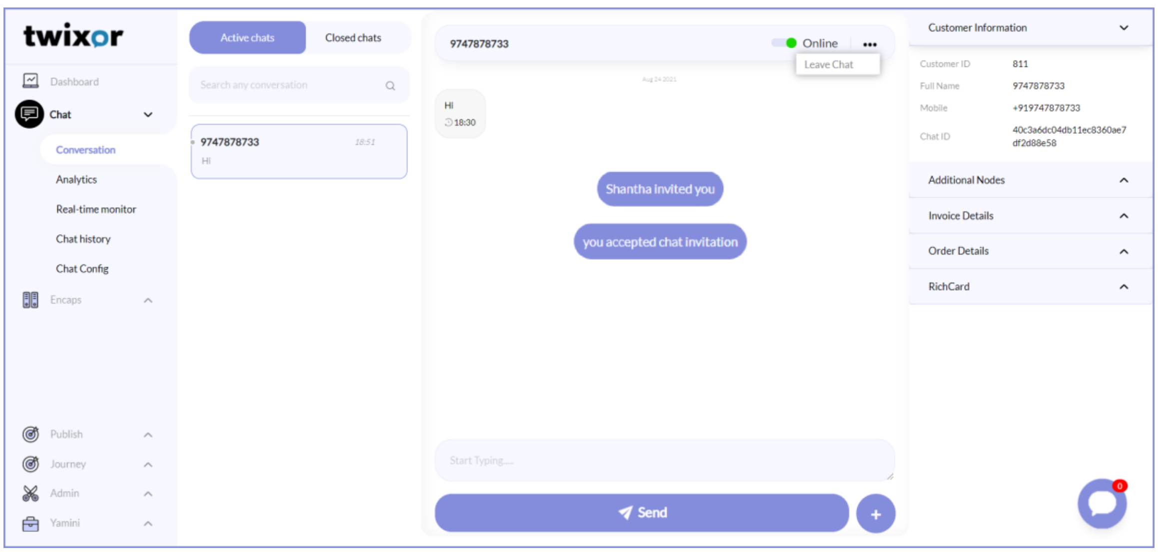
- Select **Invite Agent** to express the interest to invite a specific agent to join the conversation.
  - Click **Invite agent** option under ••• and select an agent name from the drop-down list.



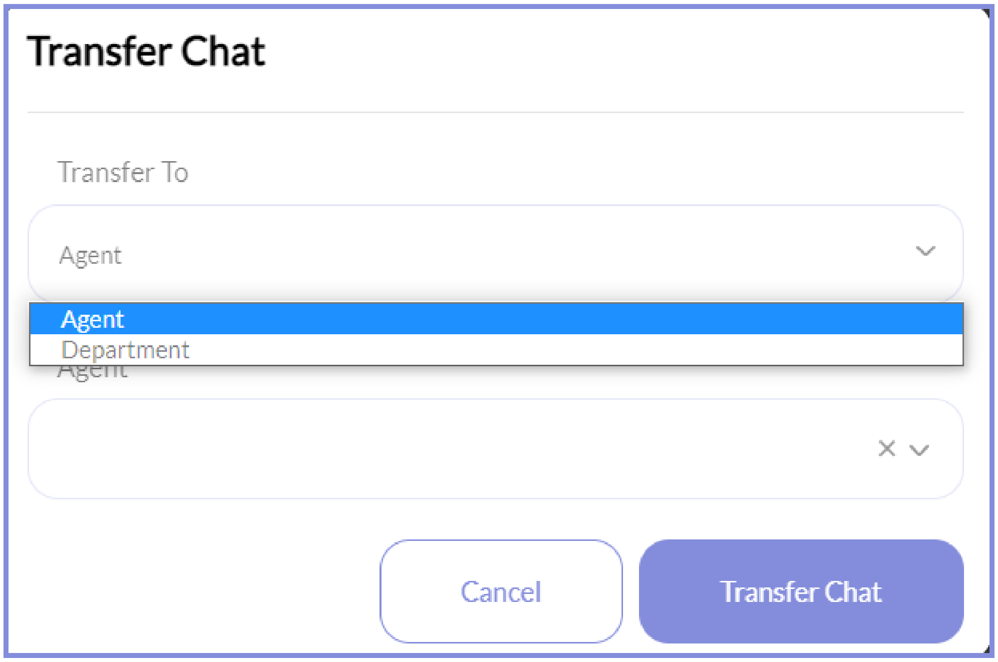
  - Click **Invite Agent** to invite them to join the active chat. In this example, we've invited the agent Chat Agent-100. You will view a message "You invited (Chat Agent Name)" in the interface as shown below.



- If the agent has accepted the invitation, they can leave the chat anytime by clicking  and selecting the **Leave Chat** option.



- The **Transfer Agent** option transfers the conversation to another agent or department if he/she doesn't belong to the concerned department or not able to resolve the query asked by that particular customer.



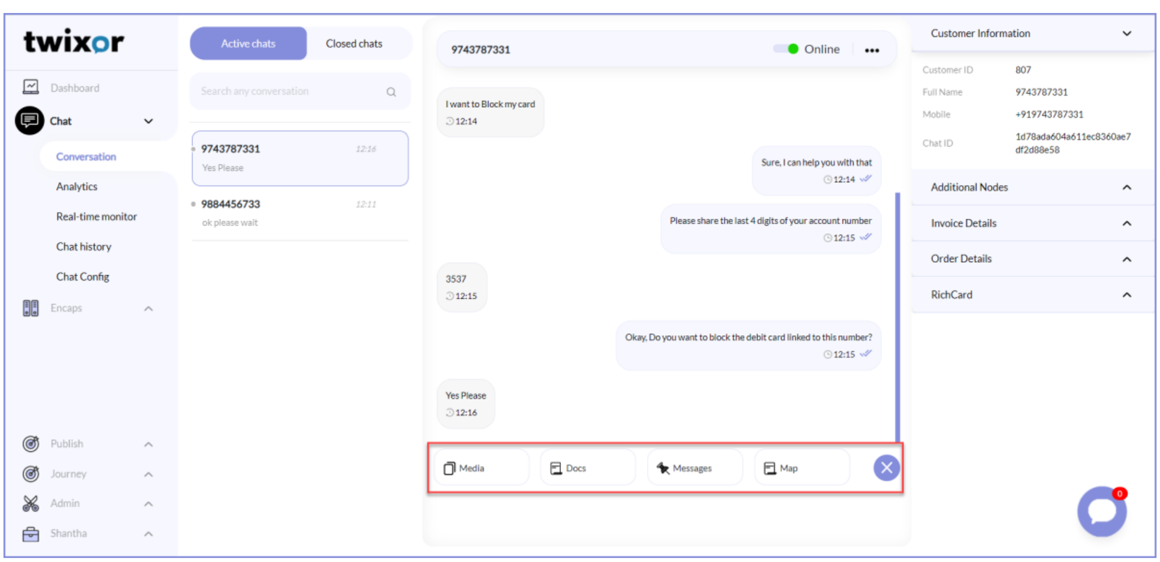
- Click either **Agent** or **Department** option from **Transfer To** drop-down list to transfer the chat to the Agent or Department, respectively.
- Select the **Agent** or the **Department** name in the below drop-down.

- Click **Close Chat** to end the conversation with the customer.

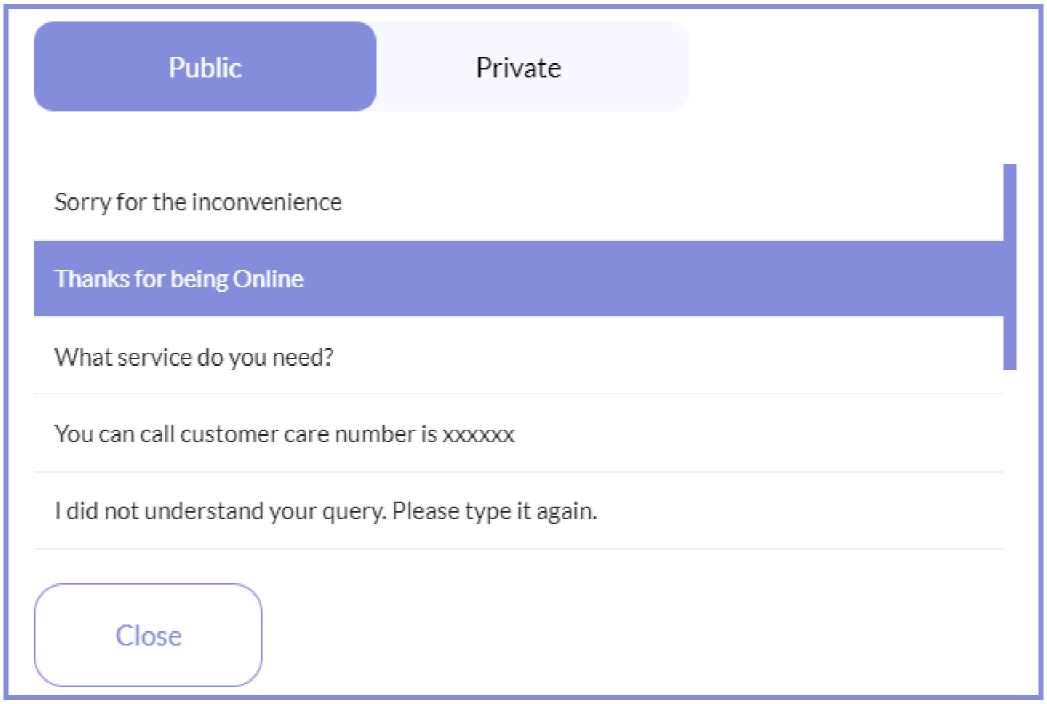
7. Click **Update** to save the data.

Attach and send Media

You can attach the rich media (**Media**, **Documents**, **Messages**, **Map**) and canned messages in your chat flow to encourage and engage your customers.



- Click icon to attach the **Media**, **Docs**, **Messages**, and **Map** for transforming the customer conversations into rich and interactive experiences.
- **Info!** These artifacts (Media, Documents, Messages, and Map) can be added in the **Departments** page
- Click to attach the documents and media files from your local device. The file open dialogue box appears. Select the relevant file and click **Open**.
- You can preset the group of messages called **Canned Messages** to send it to the customers. So you don't need to retype the same message again. Click Messages to send the canned message.



Info! You can add these private and public canned messages in the **Departments** page

Refer **Manage Departments** guide to add the **rich media artifacts** and **canned messages** that will be attached and sent to the customers.

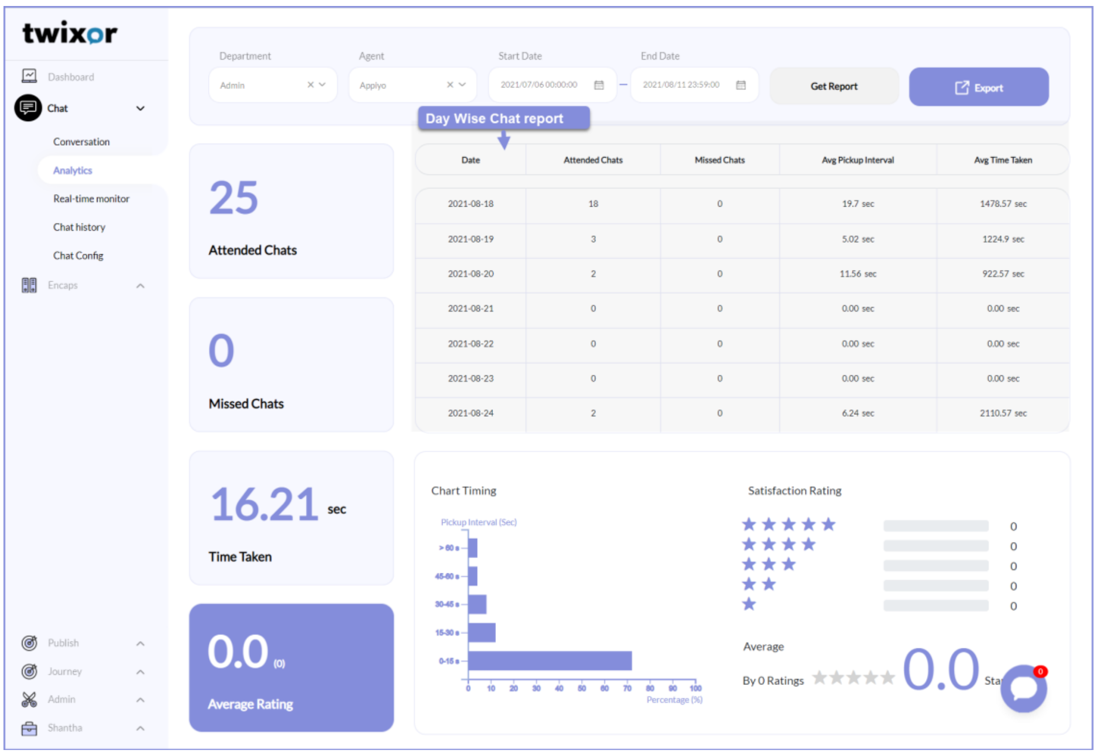
You can also view chat reports, monitor chats, observe chat history, and configure the chat widget respectively from the topics **Analytics**, **Monitor**, **Chat History**, and **Chat Config**.

Chat Analytics

While looking for the ways to improve customer engagement, Chat Analytics plays an important role.

Tracking the areas of your customer support that needs enhancement can be easily done in Twixor EnCaps by the built-in analytics feature, which traces the essential chat metrics.

Find the Twixor EnCaps **Chat Analytics** Dashboard here:



In this page, we'll describe the most important live chat metrics used in Twixor EnCaps that will turn your customer agents into a crew of support champions. I believe that you'll find these ways painless to employ in your business too!

To view the way the chat utilization impacts the measurements like average **Chat Timings**(how long the visitor is participating in the chat session), **Day Wise Chat Report** (Number of chats taken place per day) and **Satisfaction Rating** (What is the level of user satisfaction for this particular chat session), you can use this feature.

Learn about how you can use in inbuilt **Analytics** to get detailed insights on how you can improve your customer satisfaction and engagement.

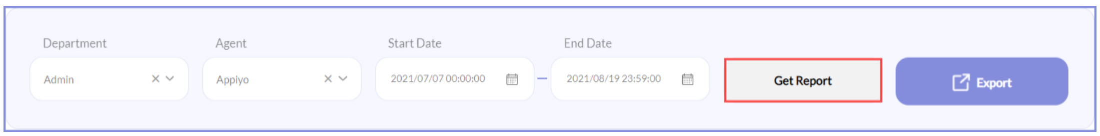
1. Head to **Chats->Analytics**.

2. Select the **Start Date** and **End Date** from the Calendar to view the chat report in between the selected days.

3. Every organization has multiple departments and each department is responsible for performing their own duties. For example, chat regarding payments will be handled by Accounts department. Select the **Department** to filter the chats attended by them.

4. Choose the name of the **Agent** to restrain the chats handled by that particular agent.

5. Click **Get Report** to view the report based on the selected criteria.



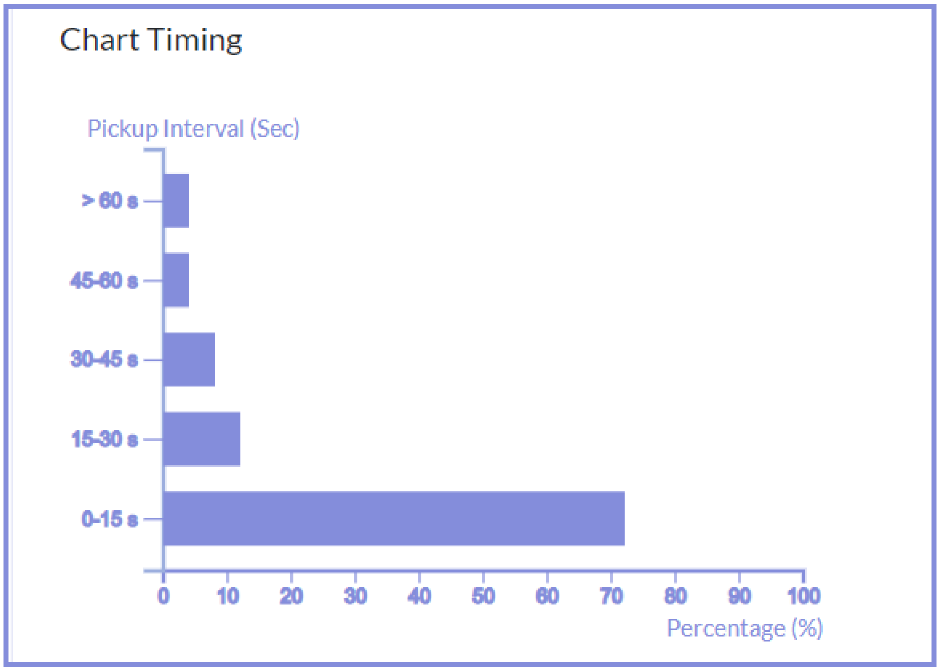
Day Wise Chat Report

This is the most interesting and important aspect of the reporting portion. This report gives you a pictorial representation of your customer service actions on daily basis. This data helps you to track the reason and time period during which the chats are missed.

Date	Attended Chats	Missed Chats	Avg Pickup Interval	Avg Time Taken
2021-07-27	0	NA	0.00 sec	0.00 sec
2021-07-28	0	NA	0.00 sec	0.00 sec
2021-07-29	0	NA	0.00 sec	0.00 sec
2021-07-30	0	NA	0.00 sec	0.00 sec
2021-07-31	0	NA	0.00 sec	0.00 sec
2021-08-01	0	NA	0.00 sec	0.00 sec
2021-08-02	2	0	309.14 sec	1800.46 sec
2021-08-03	0	NA	0.00 sec	0.00 sec

Chat Timings

It allows you to trace the time frame taken by each call agent to support consumers and here you can view in-depth insight of the total help desk accomplishment.



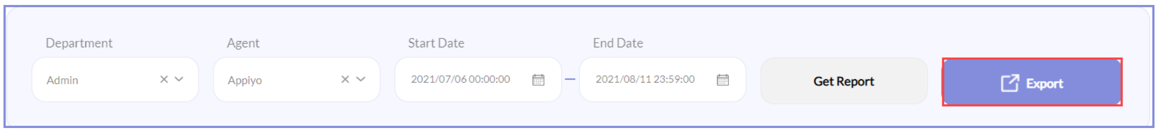
Satisfaction Rating

This displays how self-satisfied your consumers are towards your assistance. All evaluations collected while chats are summarized and uttered as a simple measurement namely the **customer satisfaction** level. Greater it is, the finer customer support.

Export the Chat Analytics

To export the underlying data of the chat analytics report to an Excel file for further analysis, do the following:

- Go to **Chats** and select the **Analytics** menu.
- Click **Export** in the filters section. You can also use filters to export the report based on criteria like **Start Date**, **End Date**, Name of the **Department** the agent belongs to, and **Agent** Name.



- After clicking Export, the Chat Analytics report will be exported to an excel file.

The Information available in the Chat Analytics Report

Date – Date and Timestamp when a chat was attended by the agents

No of Chats Picked – Total number of chats attended by the agents

No of Chats Missed – Total number of chats missed by the agents

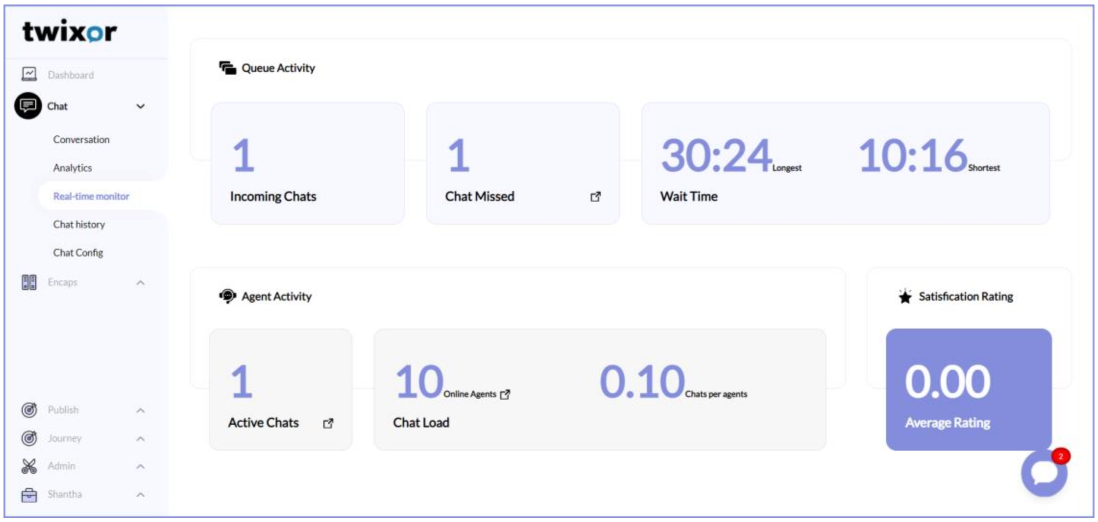
Avg Pickup Time (in Sec) – Average time taken by the agents to pick up on the chat requests

Avg Time Taken (in Sec) – Average time taken by the agents to complete the chat.

Chat Monitor

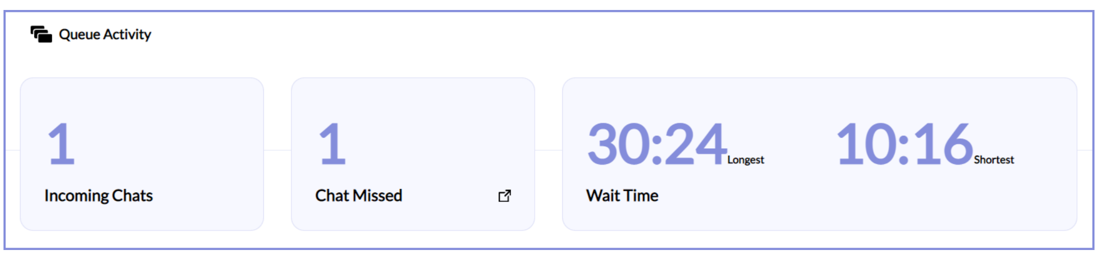
In Twixor EnCaps, you can monitor live chats at real-time by analyzing call queue, agent actions, and satisfaction rating through a single dashboard!

By monitoring your live chat, you can improve the efficiency and performance of your call agents.



Queue Activity-

Managing call queues is essential for offering excellent customer support. If an enterprise does not hone the call queue properly, they end up dissatisfying consumers.



Incoming Chats

It displays the number of chats initiated by the EnCap visitors.

Wait Time

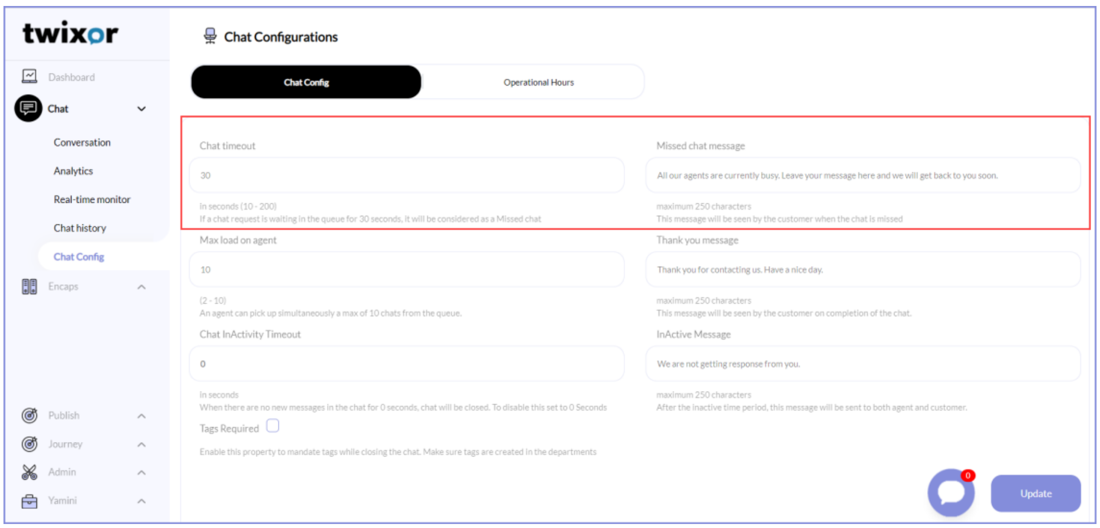
Here you can inspect the **longest and shortest wait time** in the call queue and estimate the constituents that are imparting them.

View Missed Chats

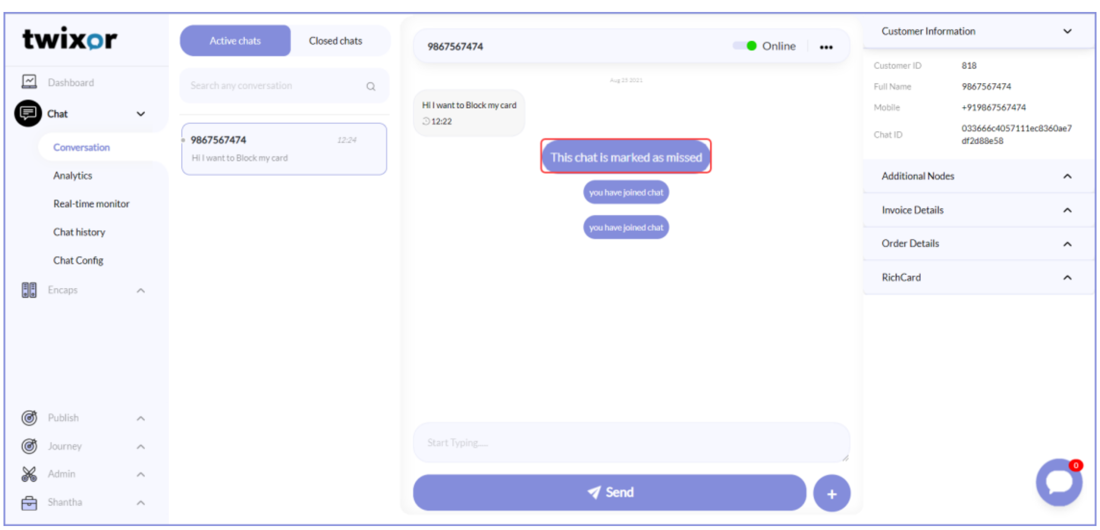
By monitoring the missed chats, you can also find out the appropriate staffing needs for not missing out the important customer chats.

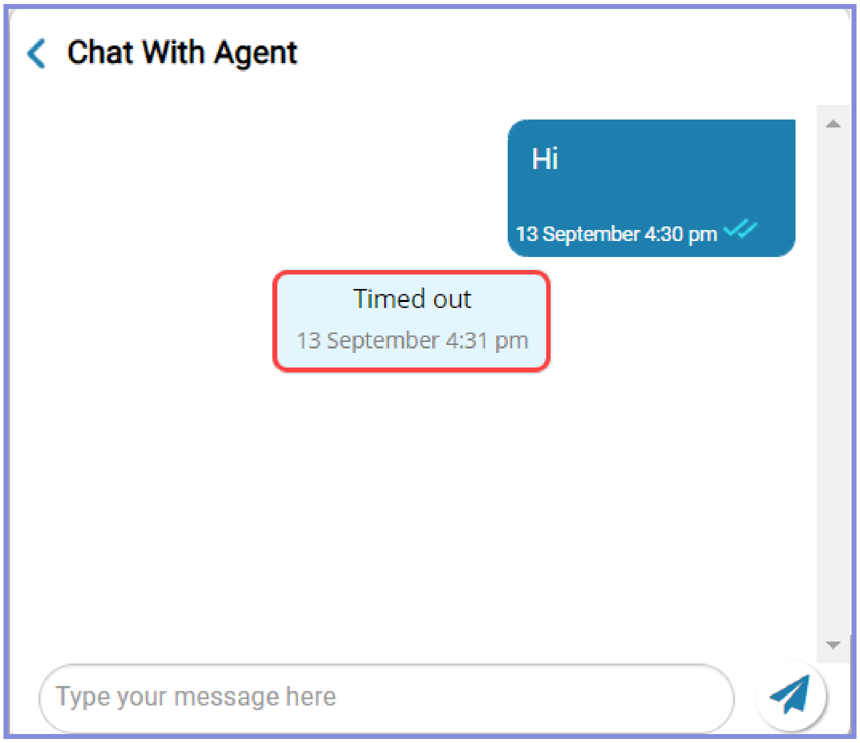
You can reopen and resume the existing conversations. Customers get frustrated if they don't get the answers when they reach out to support. By using this feature, double your chances of converting missed leads and improve customer satisfaction.

If a request to connect with an agent is on the queue for more than a specified time, it will be considered as Missed Chat. You can configure this time in the **Chat Config** Module under **Chat Timeout**.



Additionally, you can also set **Missed Chat message** that will be shown to the customer whenever there is a timeout as in the screenshot below.

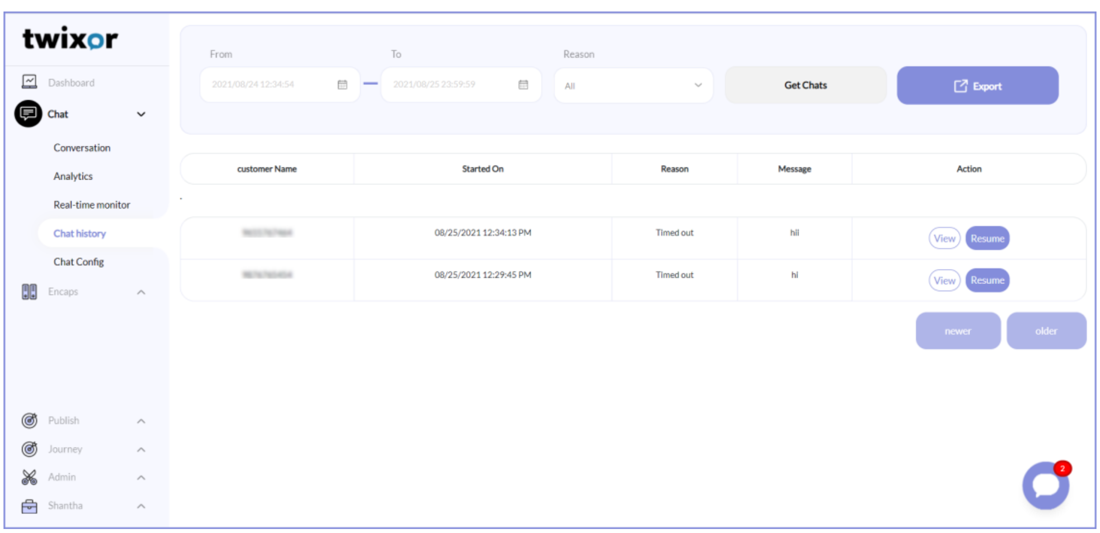




To monitor missed chats

Follow these steps to view the missed chats:

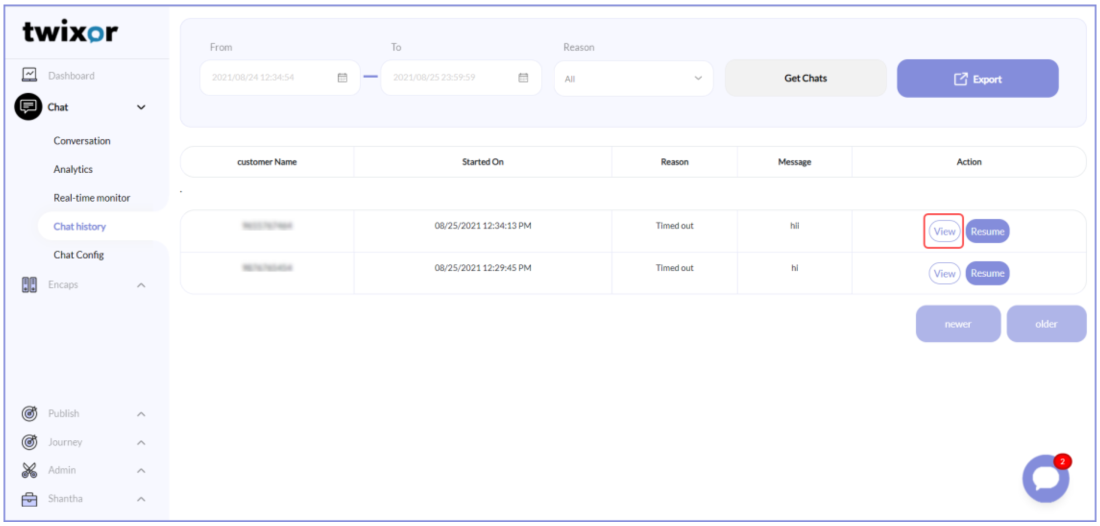
- In the **Chat Missed** section of the **Real Time Monitor dashboard**, click to view the Missed Chats.
- Select the **From Date** and **To Date** from the **calendar**, select the **Reason** and click **Get Chats** to view the details of the chats missed between these dates.



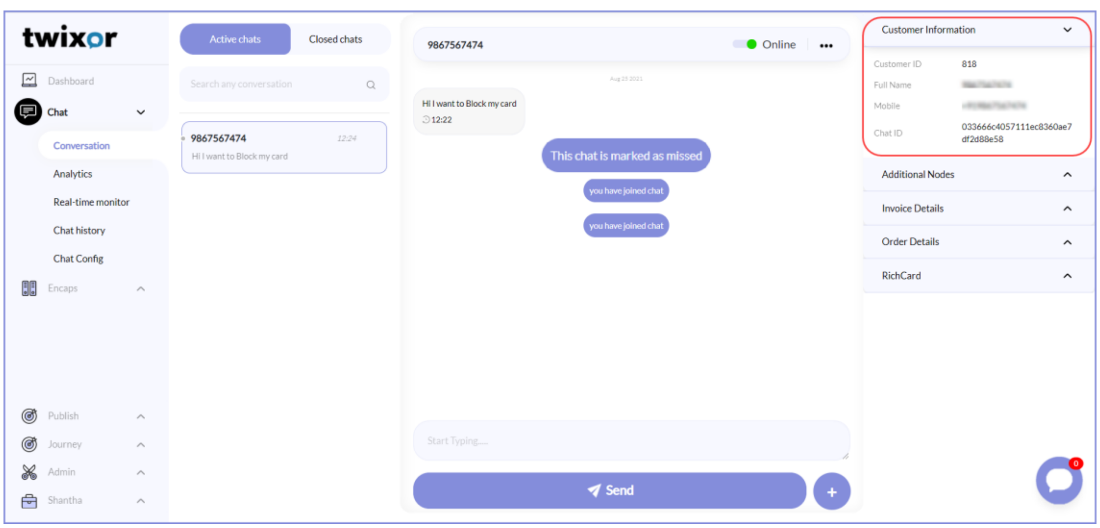
- The details like **name of the customer** who have initiated the chat, **Date** on which the chat has been **started**, for which **reason** the chat has been missed and the chat **message** will be displayed in this page.
- Select any one of the **Actions** given below.

View the details of the missed chats

- Click **View** to view the details of the missed chats.

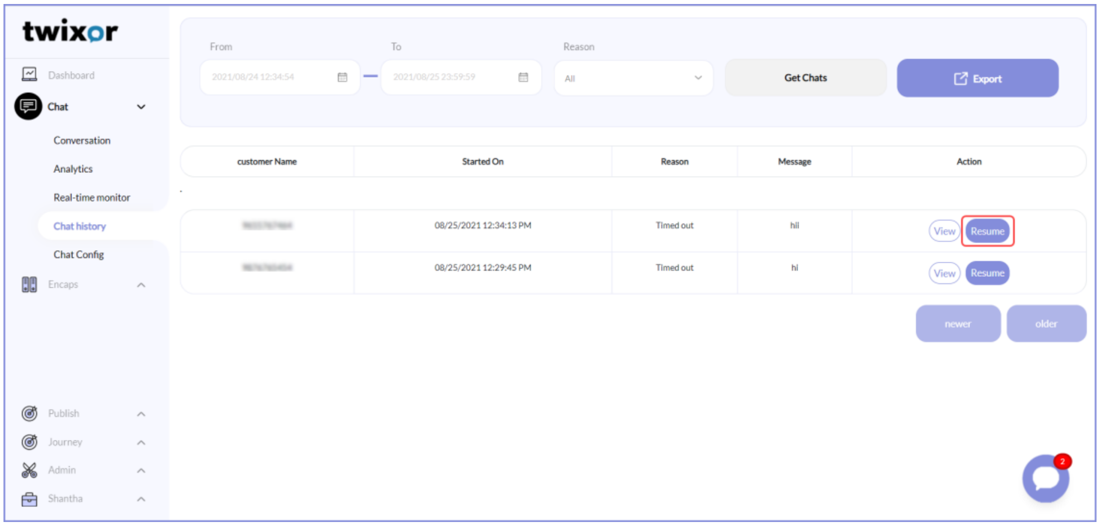


- The customer details like Customer ID, Name, Mobile Number and Chat ID will be displayed in this **View Chat** screen.

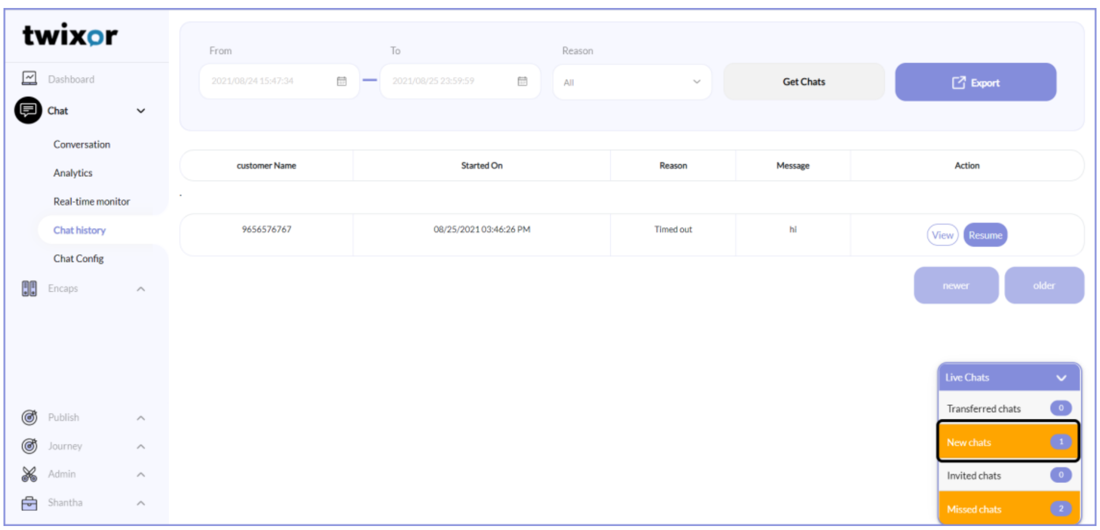


Resume the missed chats

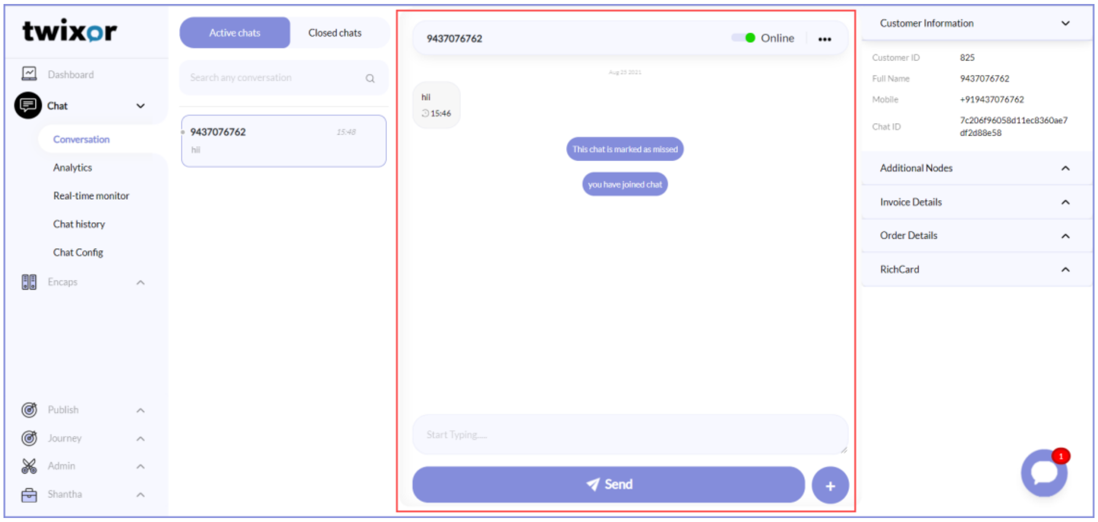
- Click **Resume** button to reopen the missed chats and resume the chats.



Once you click on the **Resume** button, the chat will be resumed as shown in the minimized chat window.



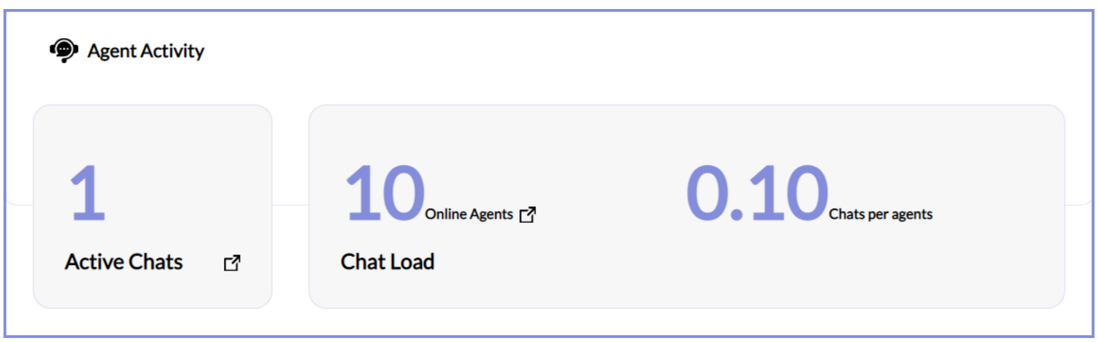
Agent can resume the missed chat in the chat interface as given below.



Agent Activity-

By observing the conversational activities of all the call agents, you can easily track down the number of chats that are currently active (**Active Chats**) and total number of chats (**Chat load**) handled by an individual agent.

Click **Online Agents** to view the status of each agent (Online/Offline) as well as their total number of current chats.



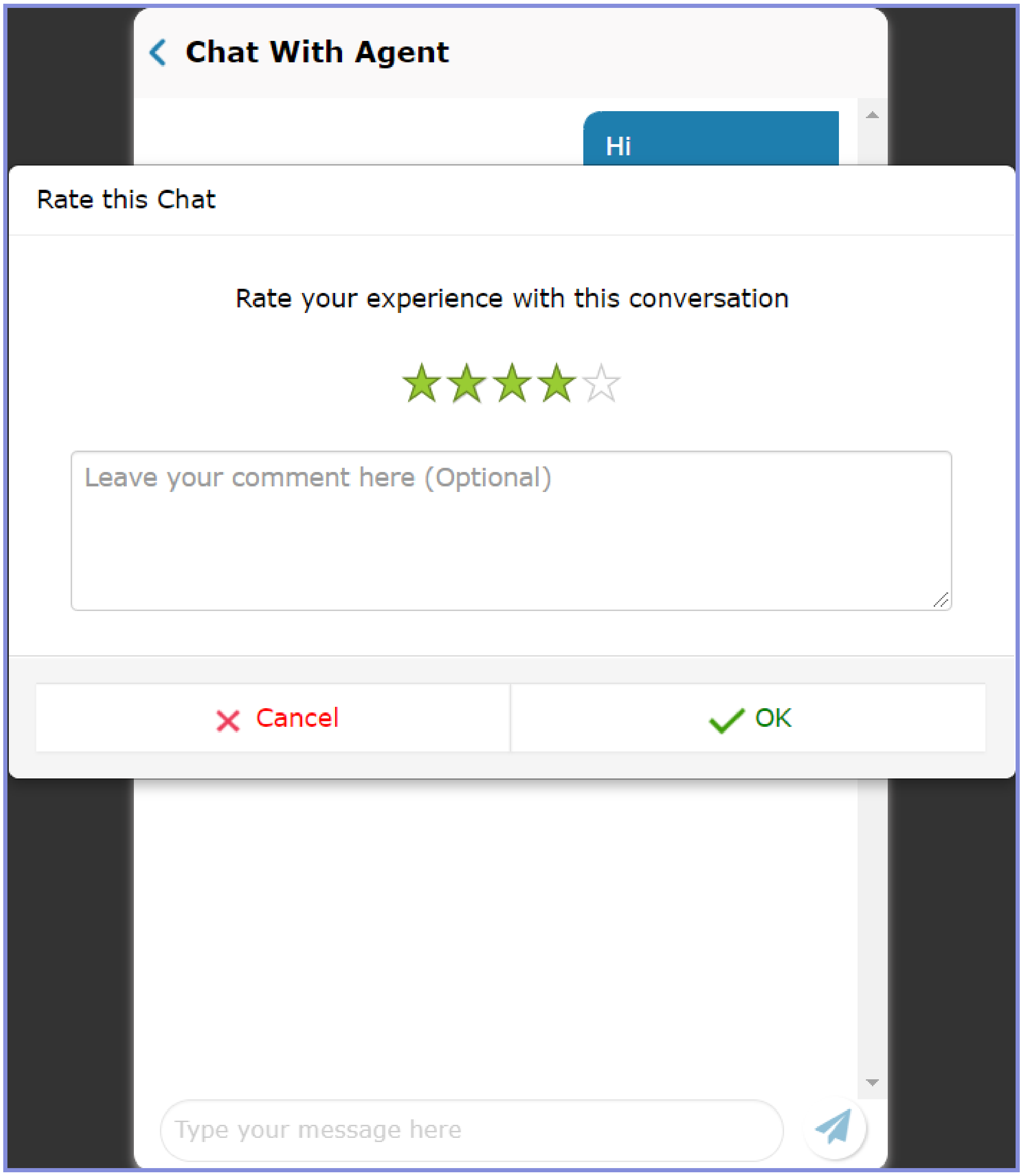
Total number of active chats is the foremost chat metric that must be monitored closely. It is not only information regarding the chats your team dealt with, merely it explains you two extra aspects.

• When you must think about including live chat agents to have extra conversations? and

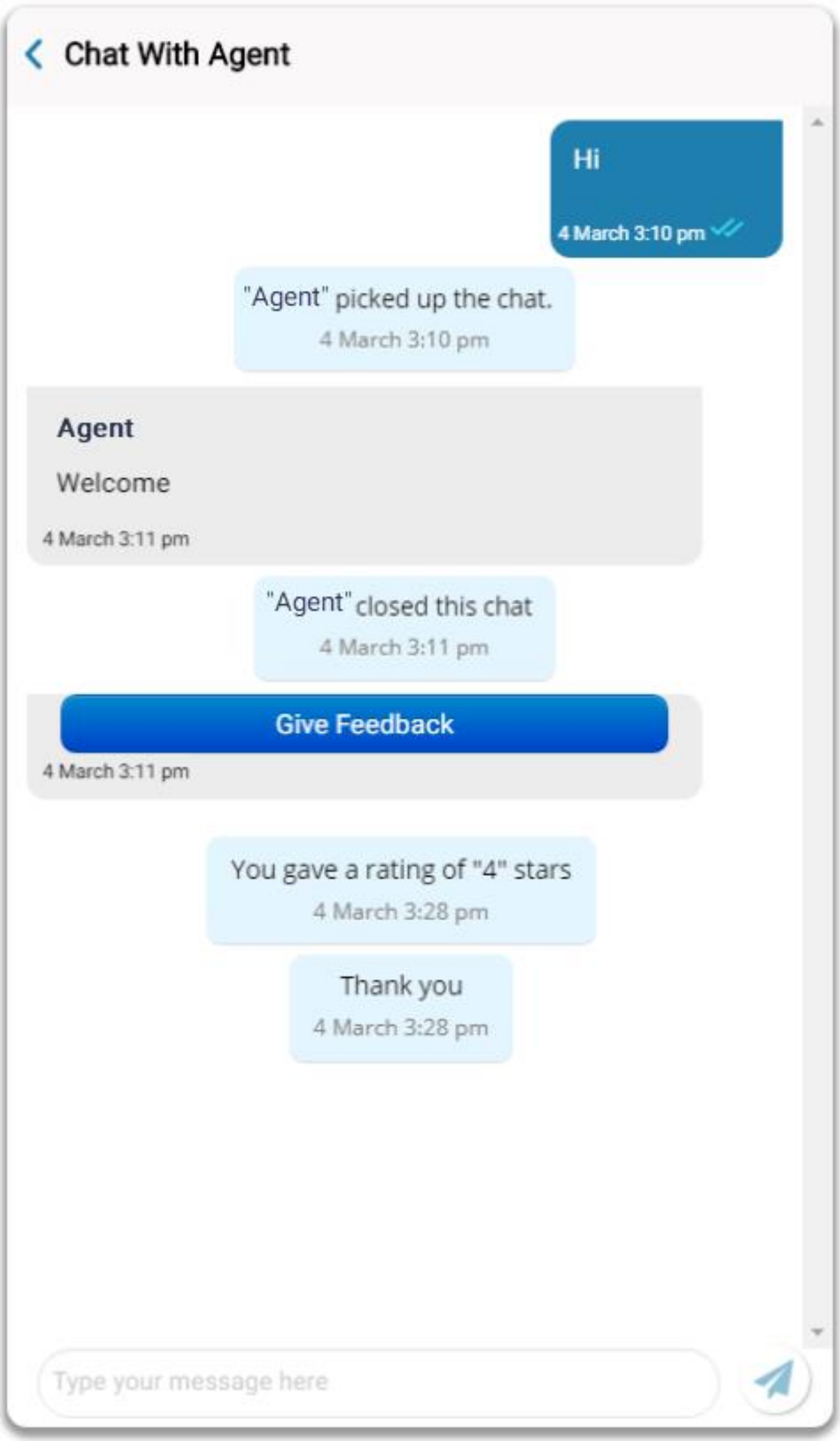
• Total number of chats handled by your department.

Satisfaction Rating-

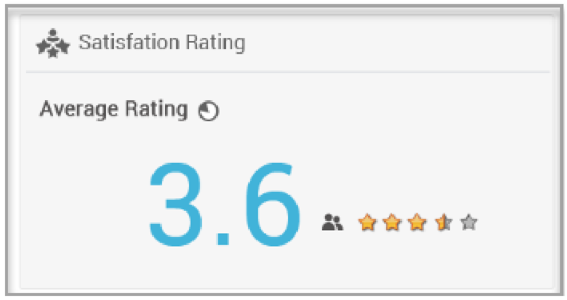
When the chat is closed, the customers are asked to provide the star rating and comments for the chat from their mobile device by clicking the **Give Feedback** button.



After providing the rating, a "Thank you" message will be displayed to the customer as shown below.


Chat With Agent
Hi
4 March 3:10 pm
"Agent" picked up the chat.
4 March 3:10 pm
Agent
Welcome
4 March 3:11 pm
"Agent" closed this chat
4 March 3:11 pm
Give Feedback
4 March 3:11 pm
You gave a rating of "4" stars
4 March 3:28 pm
Thank you
4 March 3:28 pm
Type your message here

In this **Satisfaction Rating** section of the "Chat Dashboard", you can view the number of definite tickets that are rated positively and the number of chats that left a bad impression. This will also show you whether your customers are satisfied with the received service.

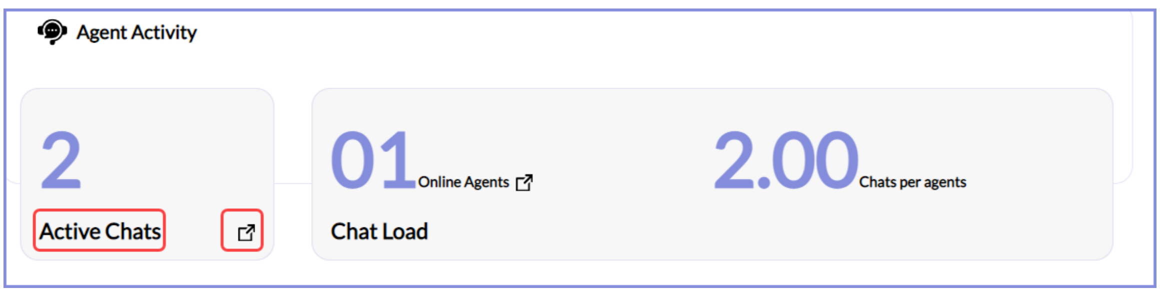


Monitor ongoing chats

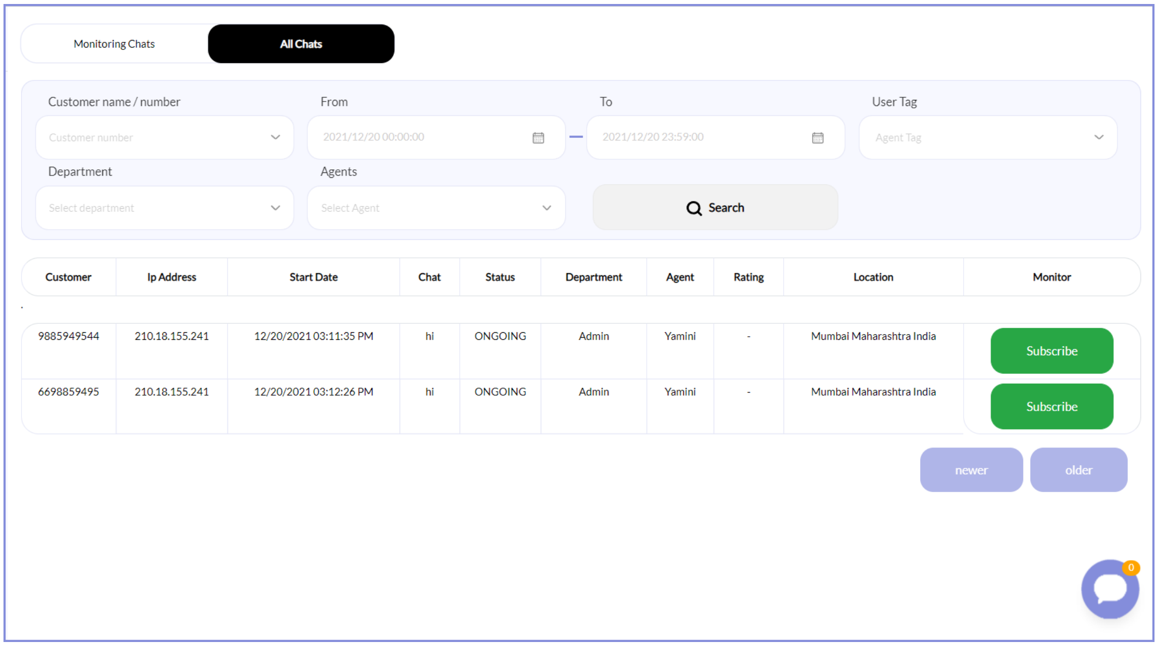
Monitor chat feature allows the admin to supervise the ongoing chats handled by other agents/admin.

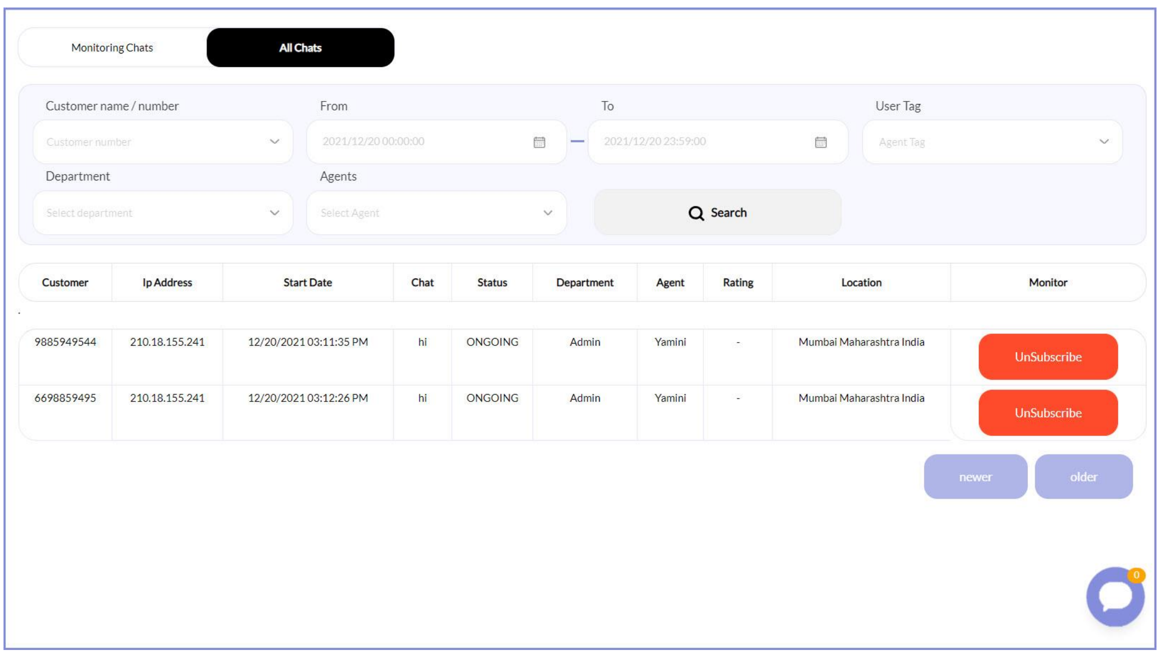
Follow these steps to monitor the chats:

- Click to view Ongoing Chats in **Active Chats** section.



- Tap **All Chats** tab and click **Subscribe** button to monitor the ongoing chats of the selected agent.





- After clicking the subscribe button, navigate to **Monitoring Chats** tab to monitor the subscribed chat.

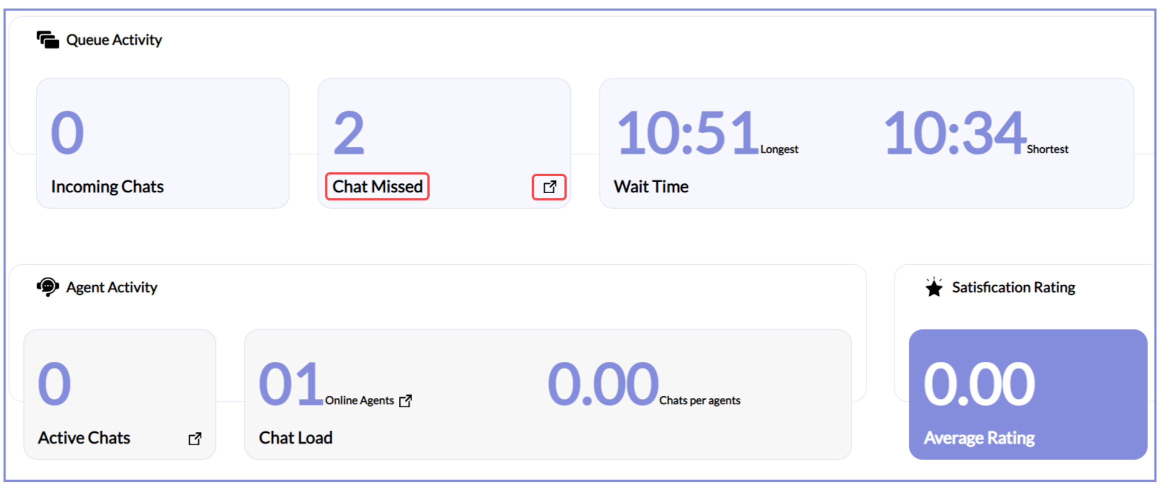
Export Missed Chats as a file

You can export the missed chats to a standard Excel file that can be viewed on any device.

> **Info!** Aside from missed chats, you can also export **Chat Analytics**

To export the missed chats to an excel file,

- On the Real time monitor page, click under **Chat Missed** section.



- Select **From Date** and **To Date** from the dropdown to view the chats missed between these dates.
- Choose the reason for an agent not to respond to the chats.
  - Select **All** to view all the missed chats.
  - Select **Timeout** to view the timed-out chats.
  - Select **Out of Working Hours** to view the chats missed when the agent is not in the working hours.
- Click Export on the Missed Chats page to export the missed chats to the standard excel file for future reference.

The Information available in the Chat Monitor Report:

Customer - Mobile number of the Customer chatting with the Agent

IP Address - IP Address of the customer's device using which he is conversing with the agent

Started Date - Date and Timestamp when the conversation has been started

Chat - First message sent by the customer

Missed Date - Date on which the chats are missed by the agents is revealed here

Status - Current status of the chat. For example, the chat status will be MISSED when the chat is not attended by the call agent

Department - Name of the Department which is handling the chat.

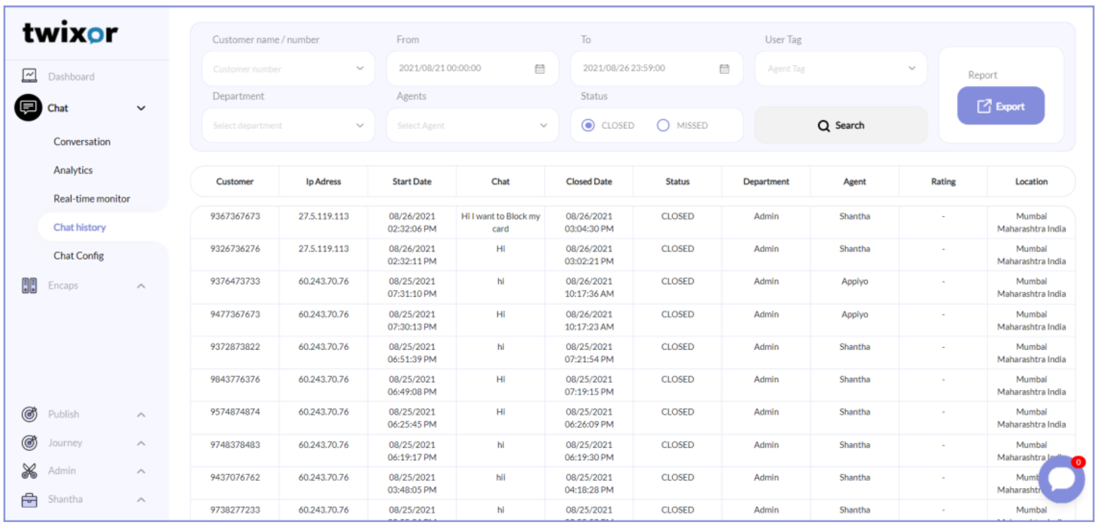
Location - Current location of the customer.

Chat History

Effective customer support is like machinery in good condition. So every part of it should operate together perfectly to prepare a flawless process.

By giving a detailed analysis of the chats handled by the specific agent on a particular day for a certain time frame and customer rating, you will be able to know how the customer is contented by the support offered by that agent.

Look out the **Chat History** page of Twixor EnCaps that provides you the elaborated record of chats.



To filter chats:-

You can filter out the chat history records by selecting any/all of the search criteria listed below and clicking **Get Chats**.

- **Customer Name/Phone Number** - Mobile number and Name of the customer chatting with the Agent
- **Started and End Date** - Starting and ending date/time of the chat conversation
- **Agent** - Agent who is **mapped with the selected department** and handling the chat
- **Status** - Current status of the chat. For example, the chat status will be **CLOSED** if the chats are closed after resolving the queries asked by the customers or **MISSED** when the chat is not attended by the call agent
- **Department** - Name of the department which is handling the chat. In the chat history example given above, the chats are handled by the Support Team department

- **User Tag** - Tag assigned to the user in **Chat Interface**

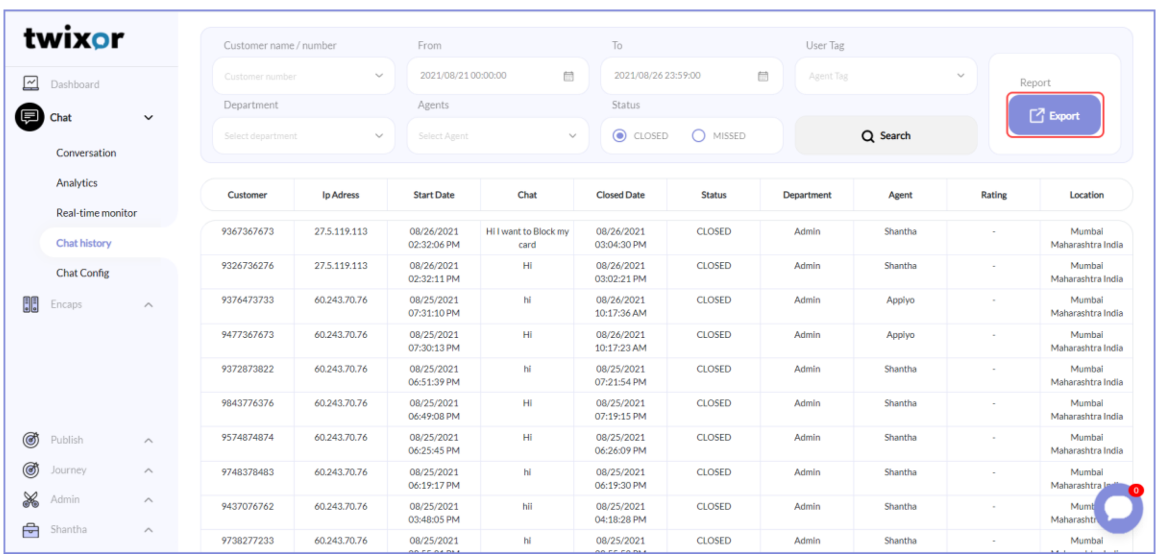
The following records will be filtered and displayed based on the selected criteria given above.

- **IP Address** - IP Address of the customer's device using which he is conversing with the agent
- **Closed Date** - Date on which the chats are closed. This data will be displayed if you select the **CLOSED** option from the **Status**
- **Missed Date** - Date on which the chats are missed by the agents is revealed here
- **Chat** - The actual conversation between the customer and the agent
- **Rating** - Customer rating for the live chat support service
- **Location** - Current location of the customer

Export Chat History

Here you can export all the valuable information from the past conversations or from the specific conversations based on the search results explained in the topic above. It helps you to track the issues or document the support requests.

To export the underlying data of the chat history to an Excel file for further analysis, click the **Export** button.



Chat Configuration

You can now configure your custom chats and customer details using Twixor EnCaps. Fabricate your chat interface as a section of your enterprise portal by using tailored options.

Chat Widget Configuration

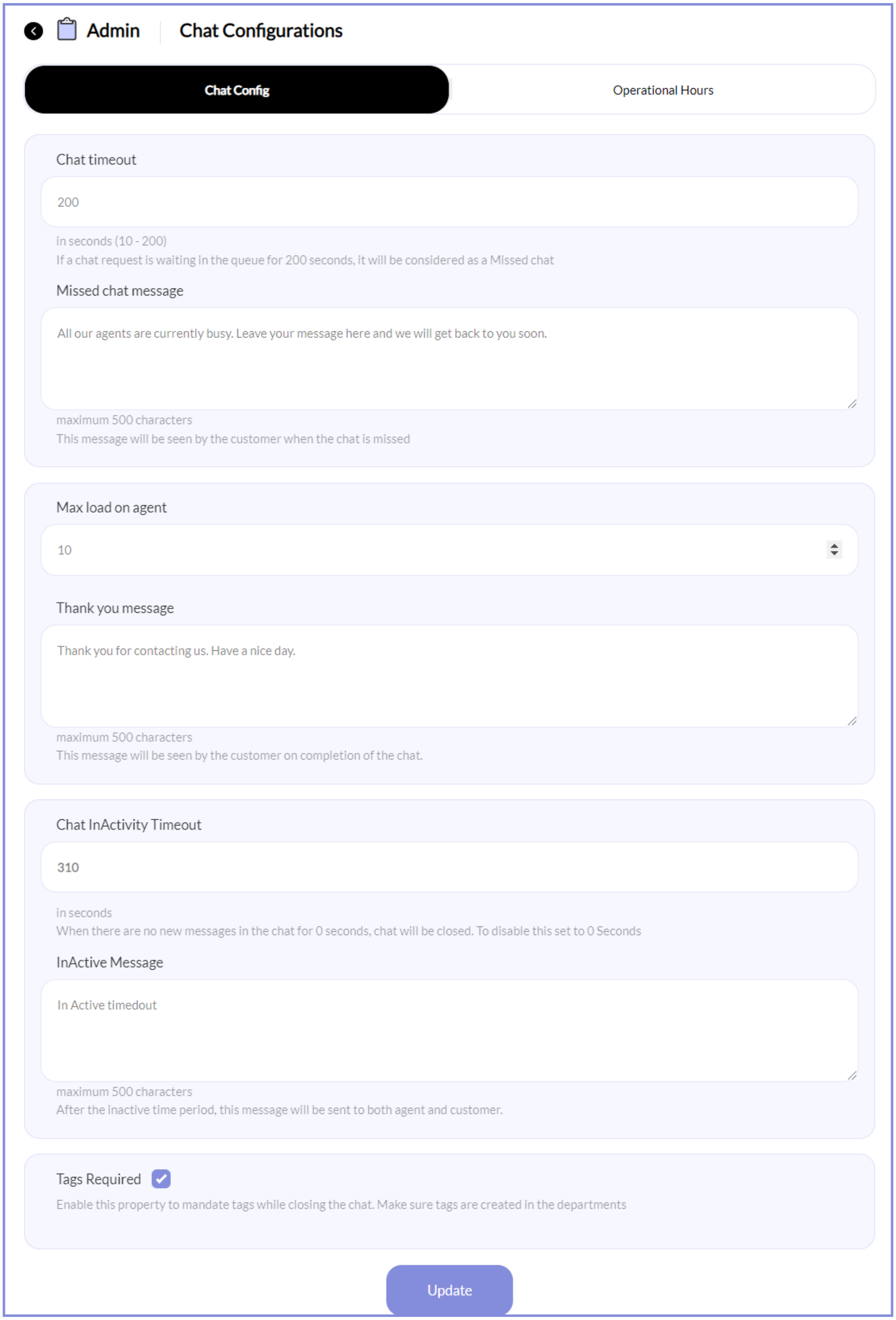
Follow these steps to configure the chats.

1. First head to **Admin -> Chat Config**.

2. To configure the custom chats, tap **Chat Config** option.

- Specify the time limits for which the customer should wait in the call queue in **Chat timeout**. If they are staying in the queue more than the specified time frame, the chat will be considered as a **Missed chat**. For example, if you set the Chat timeout as 20 seconds, chat request waiting in the chat queue for more than 20 seconds will be missed out.

- In **Missed chat message**, enter the message to be seen by the customer if their chat is lost.


Admin
Chat Configurations
Chat Config
Operational Hours
Chat timeout
200
in seconds (10 - 200)
If a chat request is waiting in the queue for 200 seconds, it will be considered as a Missed chat
Missed chat message
All our agents are currently busy. Leave your message here and we will get back to you soon.
maximum 500 characters
This message will be seen by the customer when the chat is missed
Max load on agent
10
Thank you message
Thank you for contacting us. Have a nice day.
maximum 500 characters
This message will be seen by the customer on completion of the chat.
Chat InActivity Timeout
310
in seconds
When there are no new messages in the chat for 0 seconds, chat will be closed. To disable this set to 0 Seconds
InActive Message
In Active timedout
maximum 500 characters
After the inactive time period, this message will be sent to both agent and customer.
Tags Required
Enable this property to mandate tags while closing the chat. Make sure tags are created in the departments
Update

- Key in the maximum number of chats an agent can pickup simultaneously from the queue in **Max load on agent**.
- In **Thankyou message**, type in the pleasing message to be displayed after a chat is completed.
- Enter the **Chat InActivity Timeout** (in seconds) to make the chat inactive and close a chat after a predefined amount of time if the agent has not replied for some time.
- Type the **InActive message** sent to both the agent and the customer after the set inactive period.
- Enable **Tags Required** check box to make the **tags** mandatory (in Additional notes) while closing the chat. This property will help you search your customer in chat history.

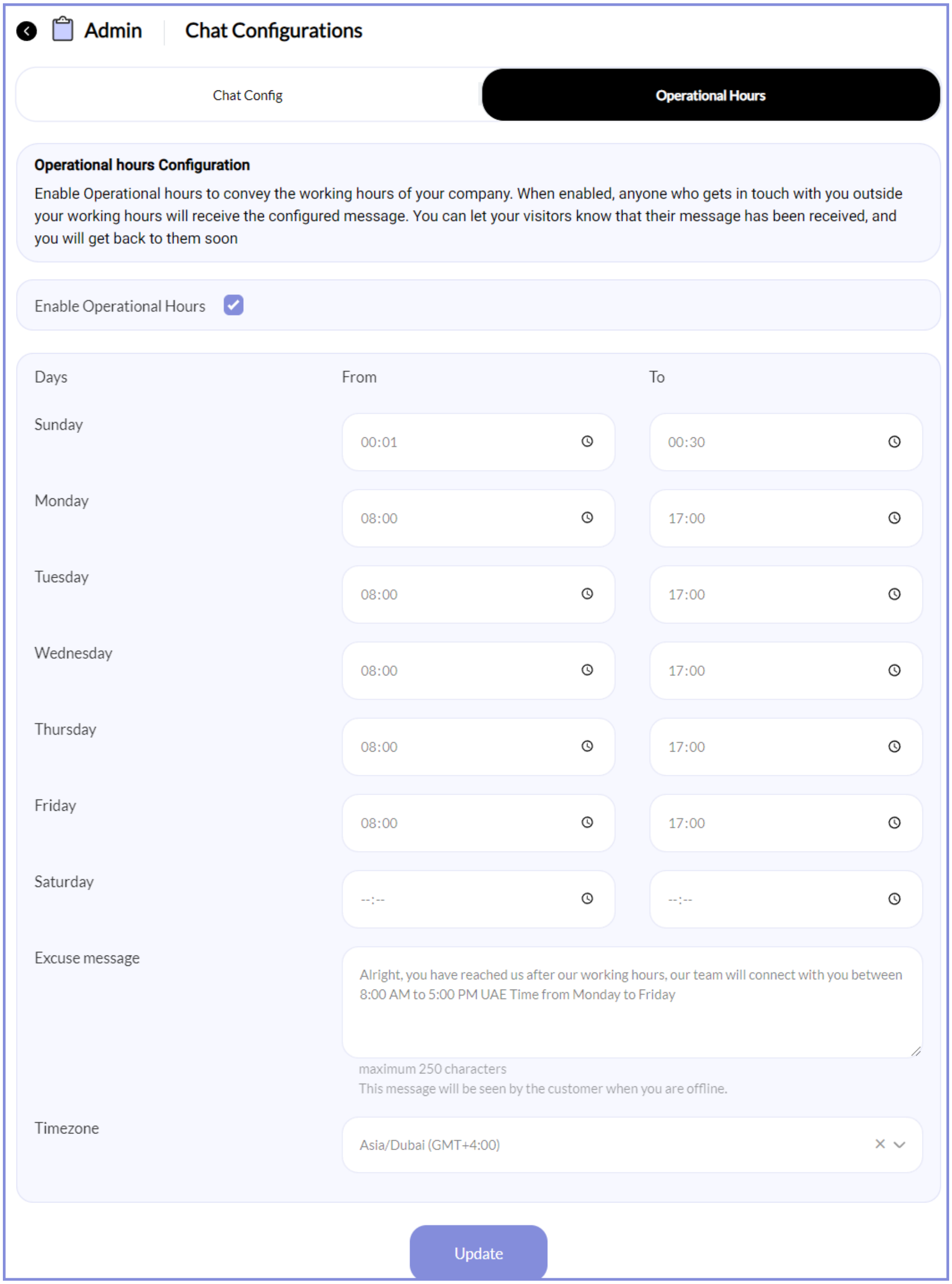
> **Info!** Create your tags in **Admin -> Departments** section.

Operational Hours Configuration

Customers need to be informed when your agents go offline or when your business is closed. This feature allows agents to configure specific working hours and chats requests that fall post operational hours will automatically be rejected.

Follow these steps to set the variable working hours for the agent:

- Click the **Operational Hours** tab under **Chat Configurations**.
- Tap **Enable Operational Hours**.
- Enter the variable work timings the agents work in a week from **Sunday** to **Saturday**.



- Enter the **start** and **end working time** respectively in **From** and **To**.
- Type the **Excuse message** that will be displayed to the customers if the chats are initiated before or after the pre-set operational hours.

- Select the **timezone** from the list of available zones across the world.

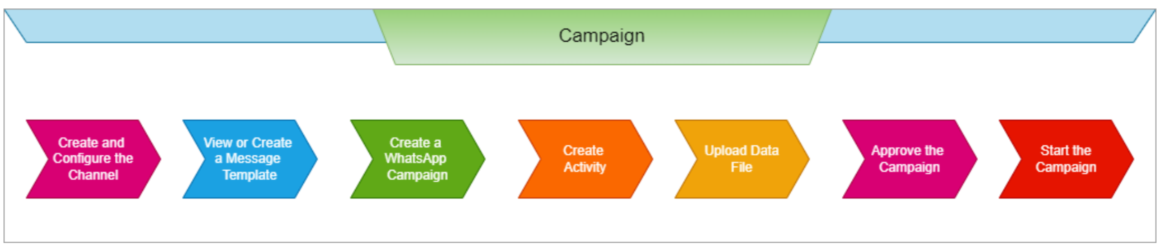
Campaign Module

Overview

WhatsApp is undoubtedly one of the most popular messaging apps globally with over 1.5 billion users. It is a simple, secure, and reliable channel for medium to large businesses to reach customers all over the world. Its journey to quick global adoption is due to its non-intrusive, non-ad, and entirely personal nature. With the addition of end-to-end encryption, business messaging is as secure as it gets with WhatsApp Business API. In Campaign module, you can create a campaign using the template, it is a strong resource for sharing important and timely notifications about your product updates.

Getting Started with Campaign Module

Have you just started to create the Campaign Module? Don't be puzzled. The links available in this section illustrate the steps to create the Campaign for WhatsApp journey.



Message Templates

Before creating the message template, create and configure the WhatsApp Channel (Refer **Create WhatsApp Channel** to form new WhatsApp channels), so that you can directly fetch the approved templates from Facebook portal or Karix server using the Template Id (Waba Id) (refer "To View the Message Templates" on page 47**) or you can create your own message template if it is not an approved template (refer "How to Create a Message Template"** on page **48**).

Users can utilize the templates to keep track of any changes or offers to their orders or accounts.

To View the Message Templates

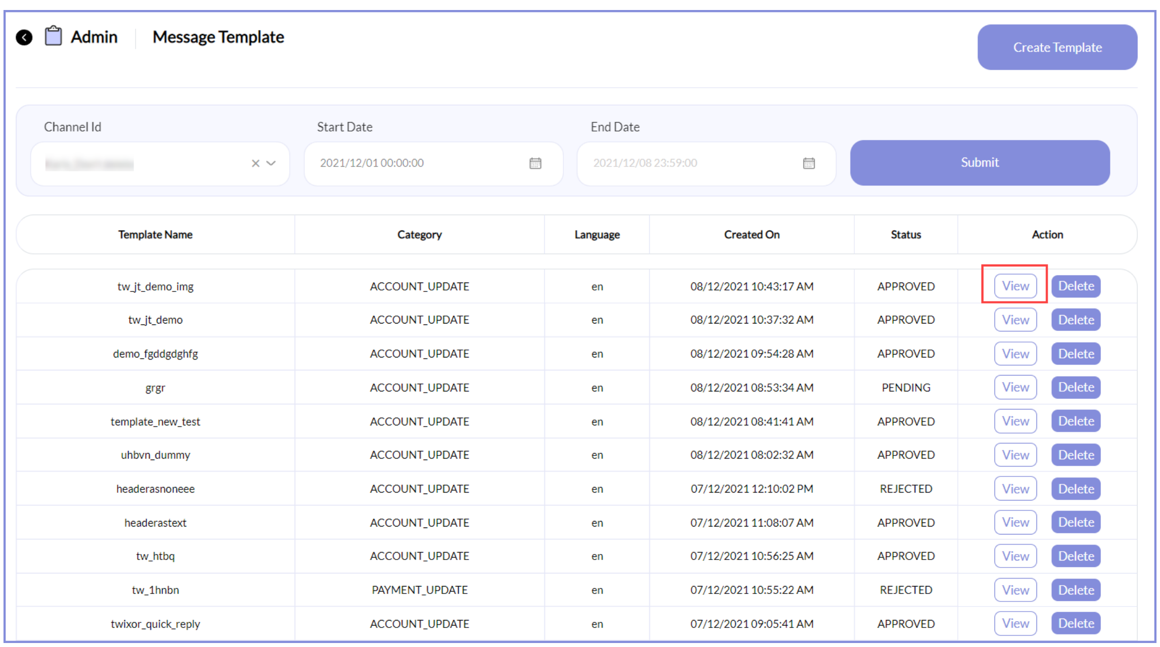
After configuring your WhatsApp channel, you can view the list of templates created using the Channel Id.

Navigation: **Admin -> Message Template**

1. Select the **Channel Id** which you have configured in Create Channel page.

2. Choose the Start Date to view the list of templates were created on and shows the approved message templates from Facebook portal.

3. And, click **View** button to preview the message.



Template Name	Category	Language	Created On	Status	Action
tw_jt_demo_img	ACCOUNT_UPDATE	en	08/12/2021 10:43:17 AM	APPROVED	View Delete
tw_jt_demo	ACCOUNT_UPDATE	en	08/12/2021 10:37:32 AM	APPROVED	View Delete
demo_fgddgdghfg	ACCOUNT_UPDATE	en	08/12/2021 09:54:28 AM	APPROVED	View Delete
grgr	ACCOUNT_UPDATE	en	08/12/2021 08:53:34 AM	PENDING	View Delete
template_new_test	ACCOUNT_UPDATE	en	08/12/2021 08:41:41 AM	APPROVED	View Delete
uhbvn_dummy	ACCOUNT_UPDATE	en	08/12/2021 08:02:32 AM	APPROVED	View Delete
headerasnoneee	ACCOUNT_UPDATE	en	07/12/2021 12:10:02 PM	REJECTED	View Delete
headerastext	ACCOUNT_UPDATE	en	07/12/2021 11:08:07 AM	APPROVED	View Delete
tw_htbq	ACCOUNT_UPDATE	en	07/12/2021 10:56:25 AM	APPROVED	View Delete
tw_1hnbn	PAYMENT_UPDATE	en	07/12/2021 10:55:22 AM	REJECTED	View Delete
twixor_quick_reply	ACCOUNT_UPDATE	en	07/12/2021 09:05:41 AM	APPROVED	View Delete

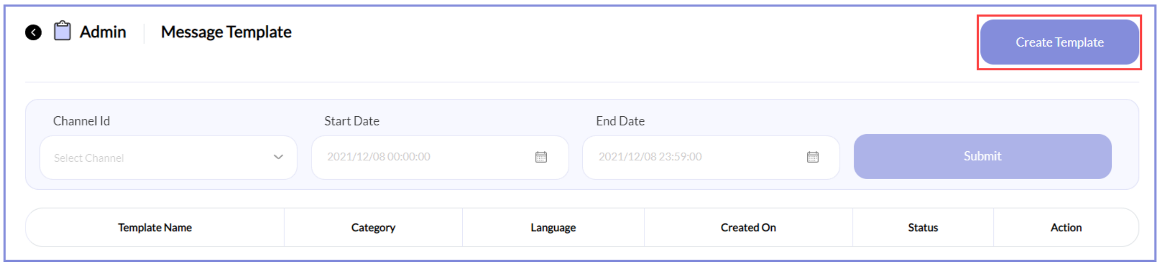
How to Create a Message Template

You can create templates for transactional and to trigger the campaign.

Here, you can create a message template and send it to Facebook portal for approval.

Navigation: **Admin -> Message Template.**

1. Click **Create Template** to create a new template.



2. Select the configured Channel Id from the drop-down.

3. Enter the unique **Name**

4. Choose the Language as **English**.

5. Select the given Category from the list;

Account Update - used to report updates or changes to customer accounts.

Payment Update - used to notify customers about their payment.

Personal Finance Update - used to notify customers about changes in their account balance.

Shipping Update - used to inform customers about updates on customer orders.

Reservation Update - used to confirm, remind, or otherwise update customers' reservations.

Issue Resolution - used to answer questions or get customer feedback about your business.

Appointment Update - used to confirm, remind, or other updates about customer appointments.

Transportation Update - used to send information about the delivery status of orders.

Ticket Update - used to send information about tickets or updates.

Alert Update - used for important updates or news.

Auto-Reply - used to automatically reply to customers when a company representative is offline or not ready to reply immediately.

6. Select the Header file type from the drop-down and add title to use in header.

> **Info!** Images, Documents and Video files chosen here will be uploaded in **Create Campaign** page.
>
> Variables {{Var}} is not allowed in headers.

7. Enter the body text for the template. You can insert emoji and variables in the message as {{1}}, {{2}}, {{3}}. When sending a campaign using a template, you can replace the variable numbers with the required variable names.

> **Info!** Make sure the variables in Body text starting from {{1}}, {{2}}, …

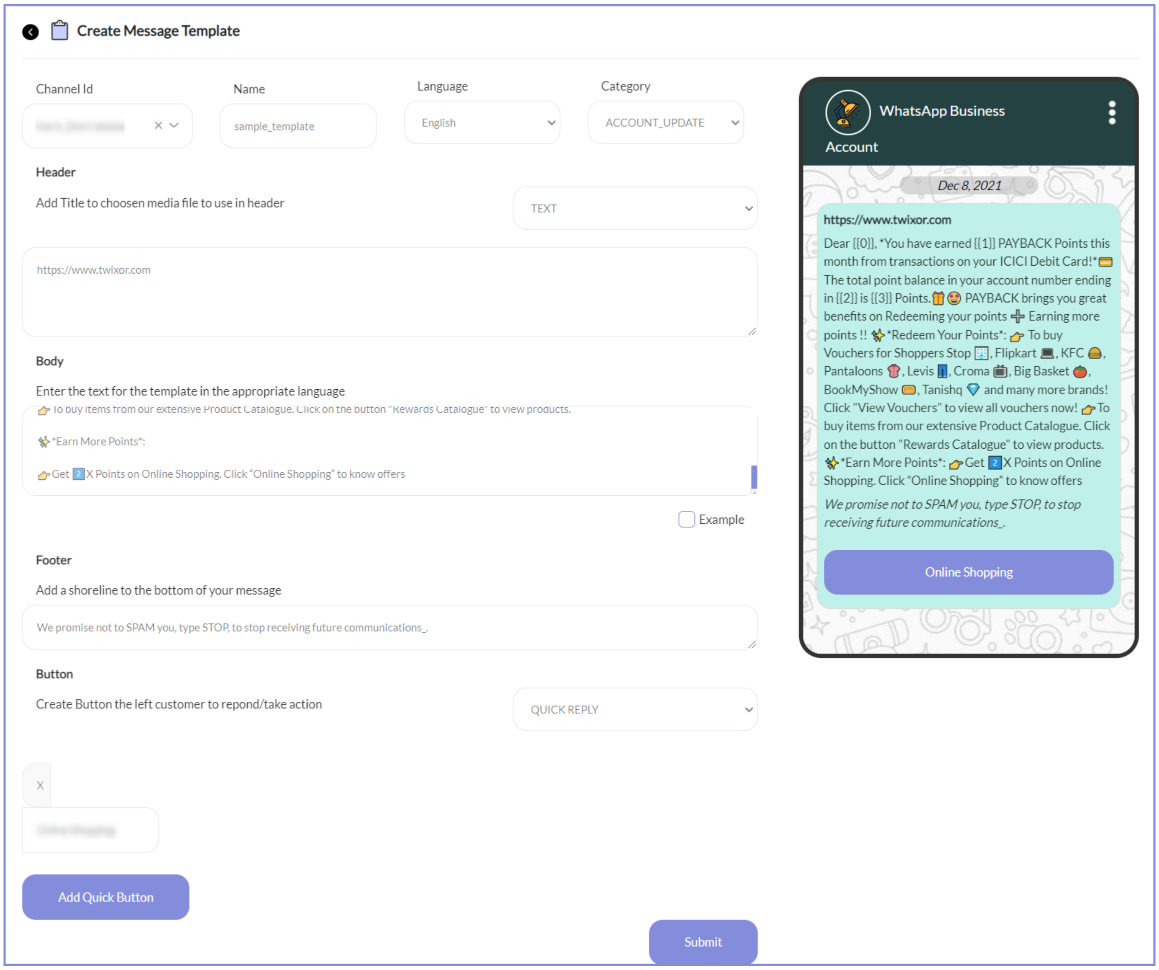
8. Add the footer text to be displayed in the bottom of your message.

Example: We promise not to SPAM you, type STOP to stop receiving future communications.

> **Info!** Variables {{Var}} is not allowed in footers

9. To add a button, click **Add Quick Button** so when the user clicks on the button, a trigger flow will be launched for the specified word.

10. After filling out all the information, click **Submit** to save the Message Template.



Create Message Template
Channel Id
Name
sample_template
Language
English
Category
ACCOUNT_UPDATE
Header
Add Title to choosen media file to use in header
TEXT
https://www.twixor.com
Body
Enter the text for the template in the appropriate language
To buy items from our extensive Product Catalogue. Click on the button "Rewards Catalogue" to view products.
Earn More Points:
Get 2X Points on Online Shopping. Click "Online Shopping" to know offers
Example
Footer
Add a shoreline to the bottom of your message
We promise not to SPAM you, type STOP, to stop receiving future communications_.
Button
Create Button the left customer to repond/take action
QUICK REPLY
X
Add Quick Button
Submit
WhatsApp Business Account
Dec 8, 2021
https://www.twixor.com
Dear {{0}}, *You have earned {{1}} PAYBACK Points this month from transactions on your ICICI Debit Card!* The total point balance in your account number ending in {{2}} is {{3}} Points. PAYBACK brings you great benefits on Redeeming your points Earning more points !! *Redeem Your Points*: To buy Vouchers for Shoppers Stop, Flipkart, KFC, Pantaloons, Levis, Croma, Big Basket, BookMyShow, Tanishq and many more brands! Click "View Vouchers" to view all vouchers now! To buy items from our extensive Product Catalogue. Click on the button "Rewards Catalogue" to view products. *Earn More Points*: Get 2X Points on Online Shopping. Click "Online Shopping" to know offers
We promise not to SPAM you, type STOP, to stop receiving future communications_.
Online Shopping

Create WhatsApp Campaign

A template can be used to design a campaign for your WhatsApp chatbot's complete audience. Maintain contact with your customers, informing them of key events or changes to their order statuses, and reminding them of scheduled activities for which they have signed up.

1. Navigate to **Campaigns -> Campaigns**

2. Click **Create Campaign**.

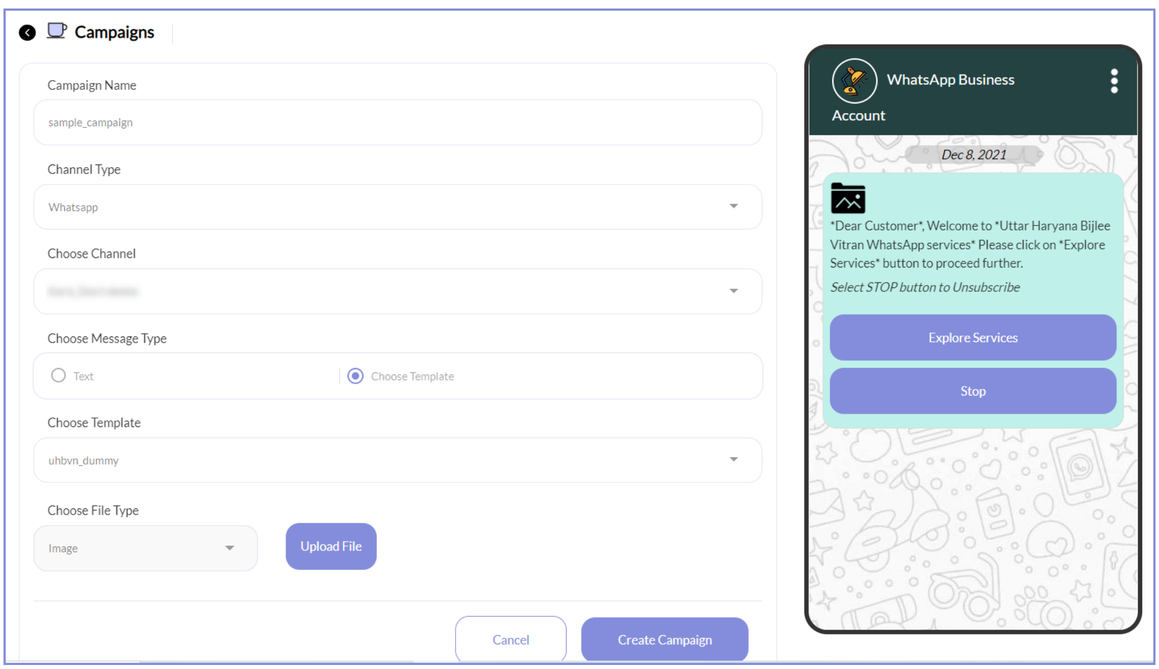
3. Enter the unique Campaign Name.

4. Choose the Channel Type as **WhatsApp**.

5. Select the Channel which you have already created and configured with approved message templates.

6. In **Choose Template**, you can choose the approved template from the list in the specified Channel.

7. After filling out the information, click **Create Campaign** to create a new Campaign.



Create Activity

After creating the Campaign, it will be directed to **Activity** page.

1. Click **Create New Activity** button and enter the Activity name.

2. Click **Upload** button to upload the base excel file. Refer Editing the Base file section before uploading.

Info! Upload and run the test file before running the actual file to make sure all the data is captured like, sent, delivered, failed, read and the button clicks. If any of the above is not captured then please get all the events enabled from the respective person who has raised the campaign request.

3. Then, the total records present in the excel will be fetched and displayed shown in the **Record Count**.

4. Select the TPS (Transaction Per Second) to send the message.

Info! By approximate, it will take around 9 minutes to send the message for 50,000 people. Maximum time seconds in TPS is 100 sec.

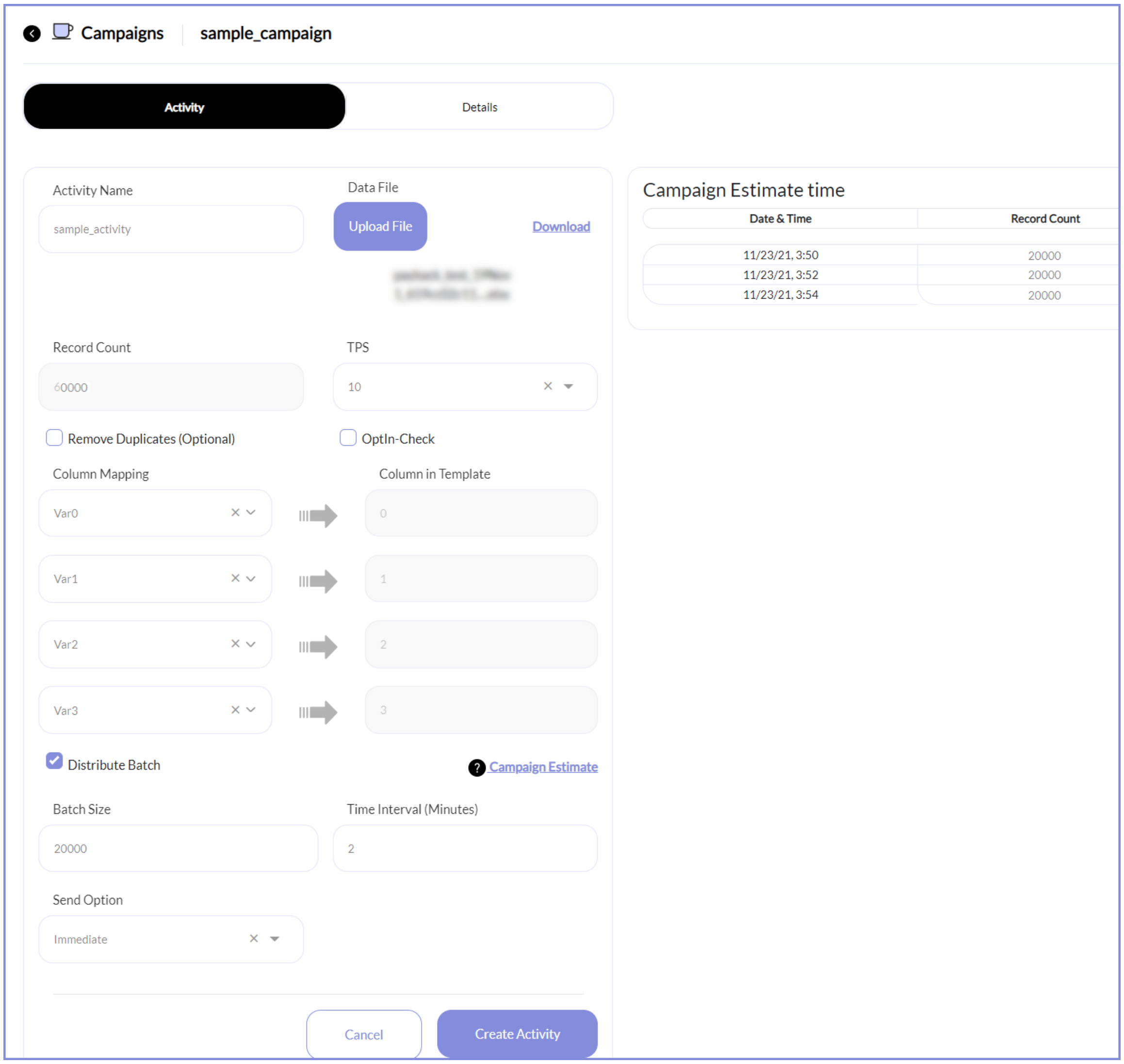
5. Map the variables we have given in the base file as Var0 = 0, Var1 =1 in Column Mapping and Column in Template.

6. Enable **Distribute Batch** check box and enter the batch size (number of peoples in each batch) and time interval to send messages for each batch.

7. Choose the **Send option** when to send the campaign: immediately or at the scheduled time.

8. After filling out the information click **Create Activity.**

Info! Click Campaign Estimate to view the estimation time and record counts for each batch.


Campaigns
sample_campaign
Activity
Details
Activity Name
sample_activity
Data File
Upload File
Download
Campaign Estimate time
Date & Time
Record Count
11/23/21, 3:50
20000
11/23/21, 3:52
20000
11/23/21, 3:54
20000
Record Count
60000
TPS
10
Remove Duplicates (Optional)
OptIn-Check
Column Mapping
Column in Template
Var0
0
Var1
1
Var2
2
Var3
3
Distribute Batch
Campaign Estimate
Batch Size
20000
Time Interval (Minutes)
2
Send Option
Immediate
Cancel
Create Activity

Editing the Base file

1. Check the specified base file size before uploading. The maximum size of the data file that can be uploaded in Campaign Activity is 15 MB. If the file size is too large, divide it in half and upload the activity as separately.

2. Change the header name in the given excel sheet as shown below.

phoneNumber

	A	B	C	D	E	F
1	Mobile Number	Var1	Var2	Var3	Var4	
2	919844473238	John	50	1802	11870	
3	919844423238	Abinav	50	1802	11870	
4	919553785298	Vinay Singh	50	8308	3504	
5	917473483842	James	50	3707	1952	
6	918438755575	Vimal	50	4204	514	
7	919439893948	Robert	50	2602	282	
8						
9						
10						
11						

3. The phoneNumber should contain the country code (+91) with prefix "+" symbol before mobile numbers for all the records otherwise the activity will not be executed.

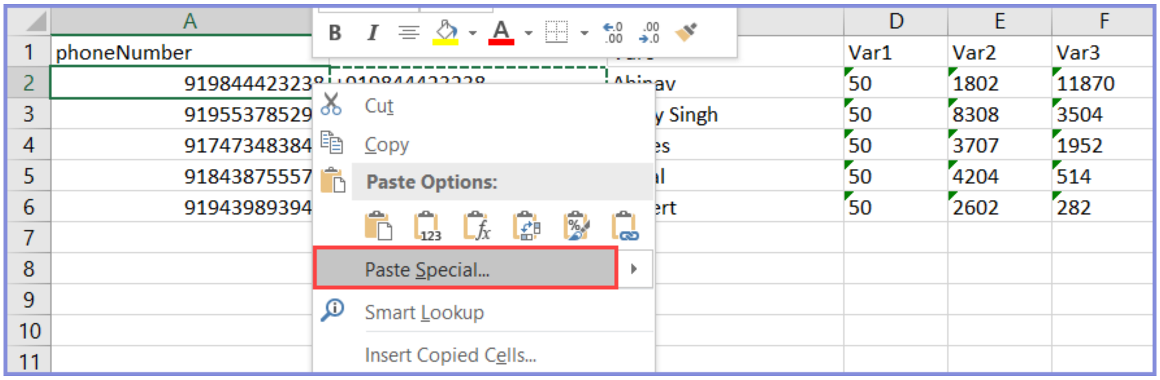
To add "+", follow the below steps,

Step 1: Insert one column next to the phoneNumber

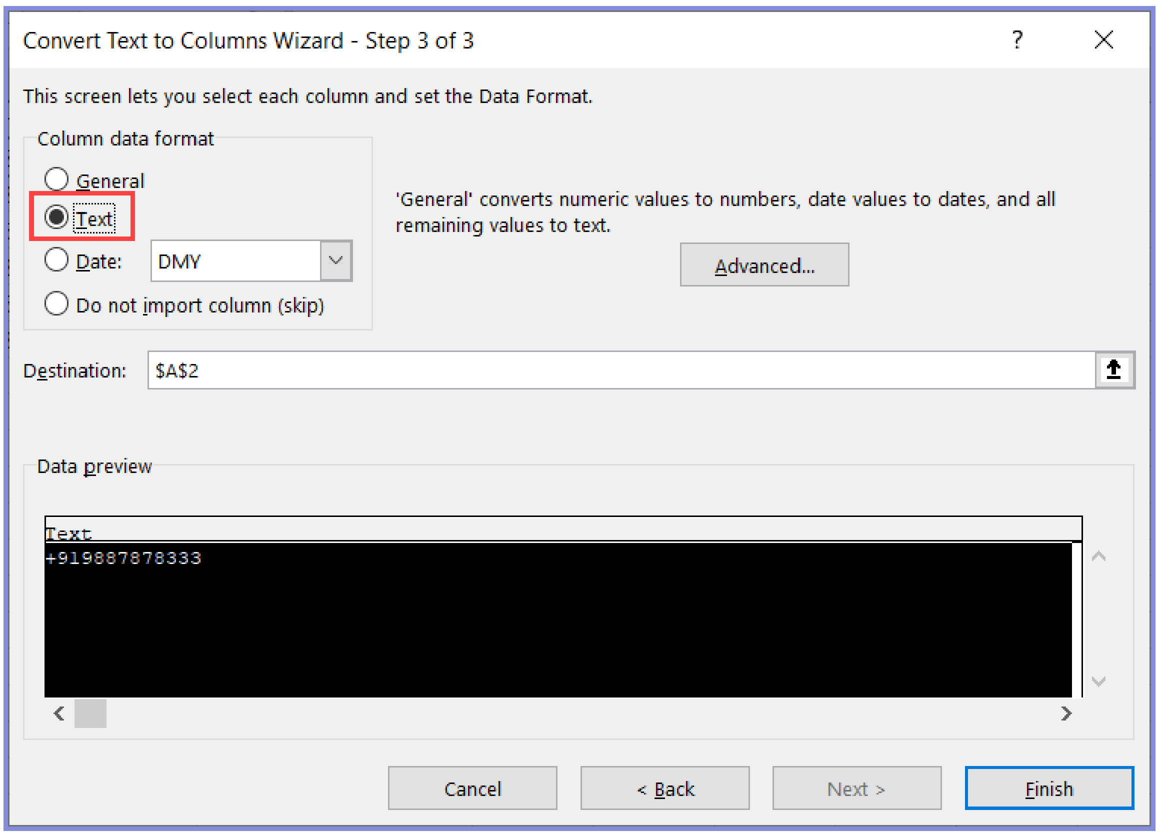
Step 2: Enter the formula **="+"&A:A** and double click to apply the formula for all records.

	A	B	C	D	E	F
1	phoneNumber		Var0	Var1	Var2	Var3
2	919844423238	="+"&A:A	Abinav	50	1802	11870
3	919553785298		Vinay Singh	50	8308	3504
4	917473483842		James	50	3707	1952
5	918438755575		Vimal	50	4204	514
6	919439893948		Robert	50	2602	282
7						
8						

Step 3: Copy the entire row and click **paste special** in the phone number column and remove the column which you have added the formula.



Step 4: Change all the numbers to Stored as text. To do that, Select the entire column and go to Data -> Text to Columns -> Delimited (Next) -> Tab (Next) -> **Text** (Finish).

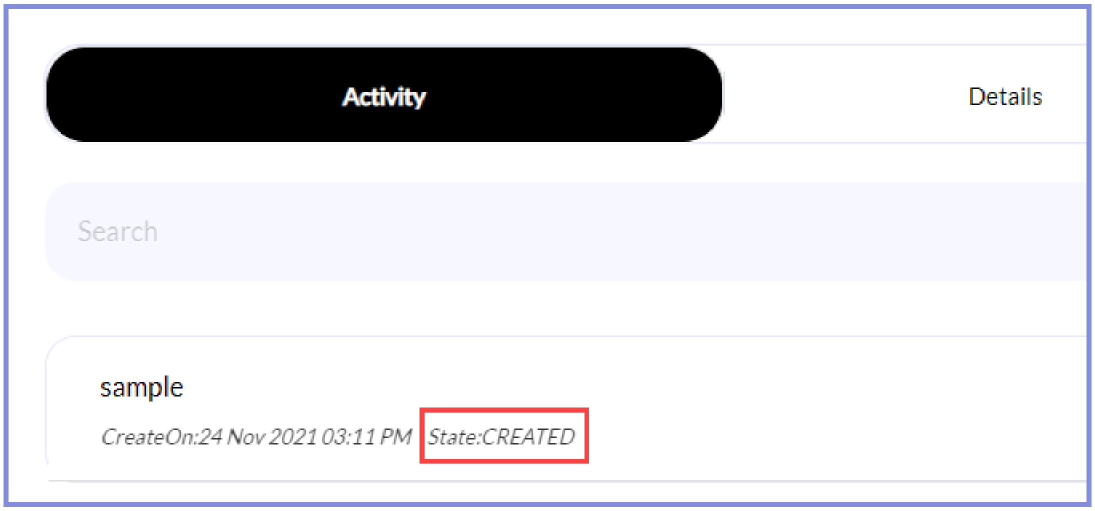


Please make sure that numbers in a sheet are being stored as text, Excel lets you know by placing a green triangle in the cell. If not stored as a text, the output in the variable will be like “You have got 50.0 points in your wallet”. To avoid this .0, we need to store all the numbers as text.

+919887878333
+919844423238
+919553785298
+917473483842
+918438755575
+919439893948

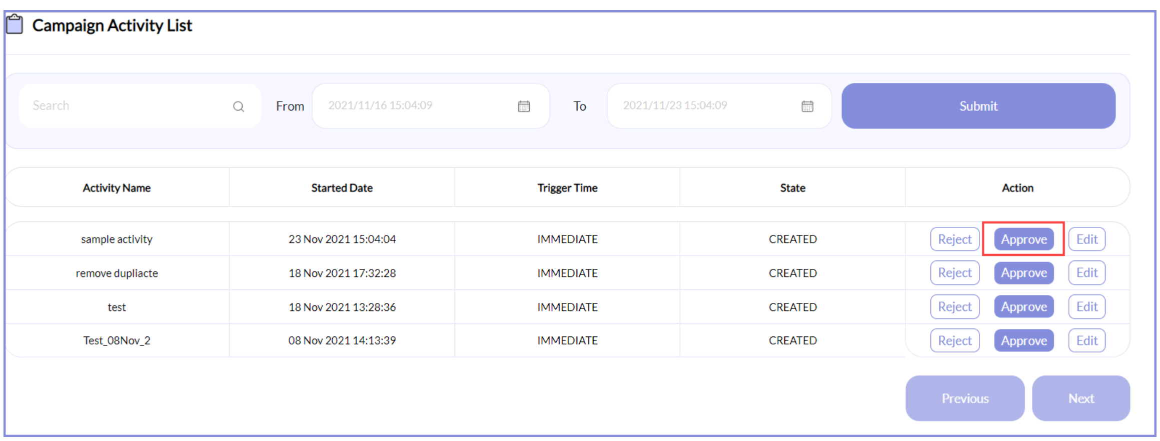
Approve the Campaign

> **Info!** It will take some time to create the activity to update the state to **CREATED** based on the file size, meanwhile it will show as **CREATING**.



Once the campaign created, navigate to **Campaigns -> List.**

From the activity list, click **Approve** button to approve the created campaign.

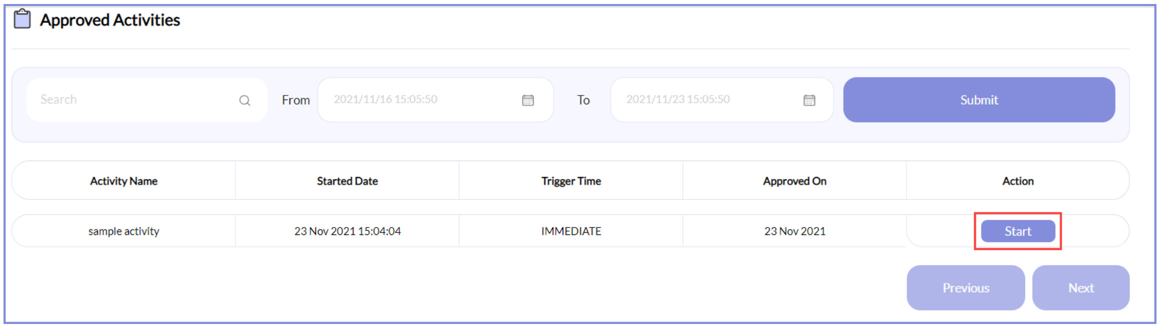


Click **Yes** to approve the campaign.


Approve Campaign
Do You want to Approve the Campaign ?
No
Yes

Start the Campaign

Then, navigate to **Campaigns -> Approved** and click **Start** button to start the campaign.

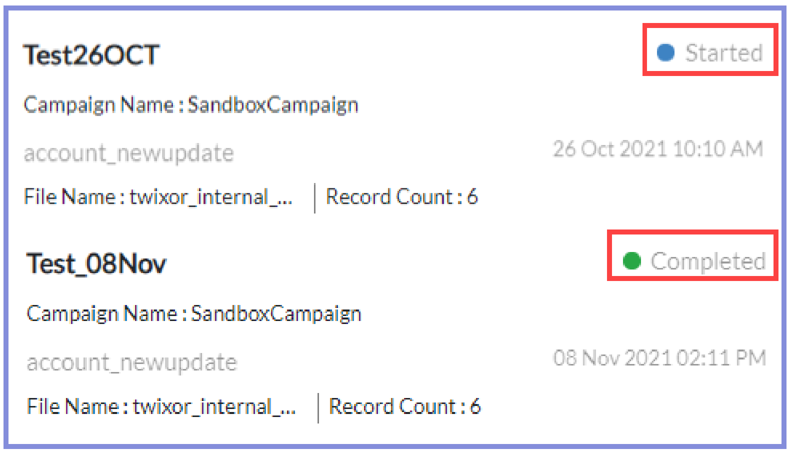


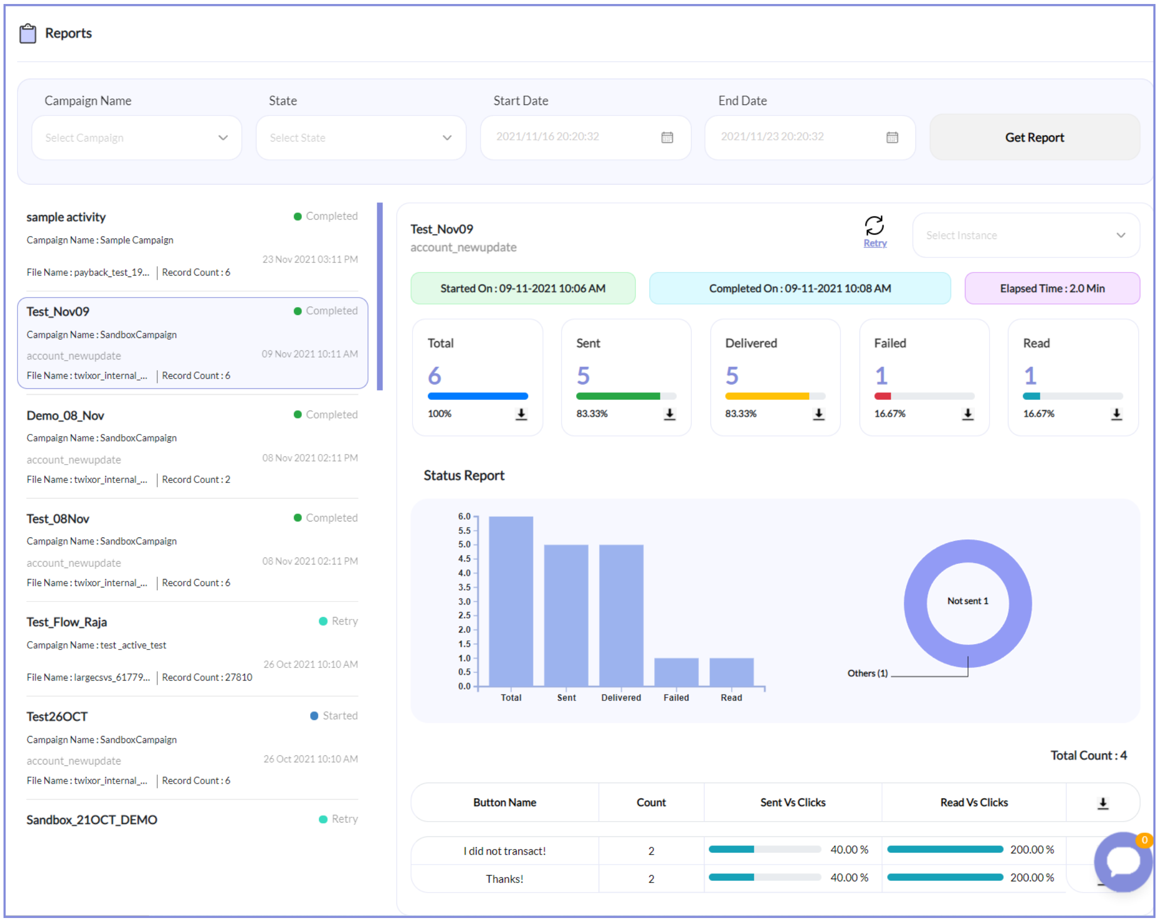
Campaign Reports

You can view the campaign reports based on their status and duration. Select the Campaign name, status of the campaign which you want to view the report.

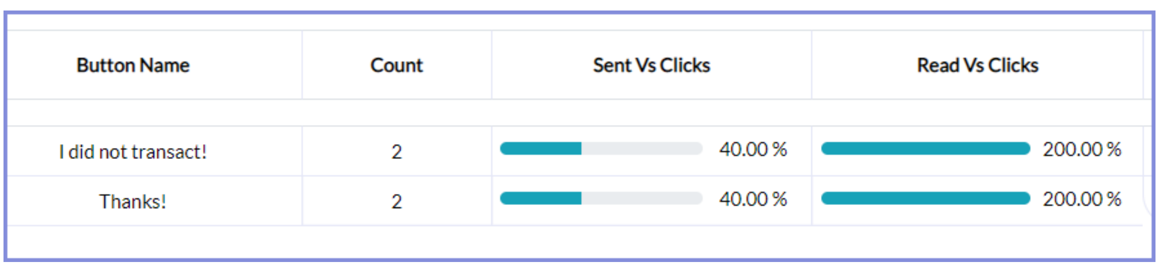
You can analyze the total number of messages, number of messages sent, number of messages delivered, number of messages failed and number of read messages with the status report.

While the campaign is running you will see the status as Started, once it finishes sending the messages to the entire batch, it will be changed to Completed. You can see the status changed to completed after the estimate end time.



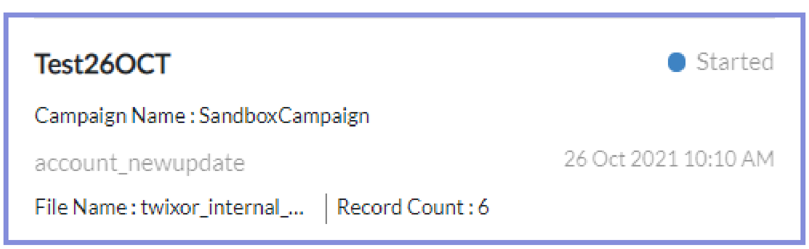


Here, the number of users who clicks the button will be displayed.



Button Name	Count	Sent Vs Clicks	Read Vs Clicks
I did not transact!	2	40.00 %	200.00 %
Thanks!	2	40.00 %	200.00 %

Info! To refresh, click on the activity name to reload/ refresh the count.



EnCaps

Overview

What do we mean by customer engagement? In most cases, you will be providing a product or a service to a customer. You might have observed that you are not the only business that can solve a customer's problem. There are many other businesses that can solve the same problem that you are solving, better or as well as you. So why would a customer choose to come to you? This is where customer engagement plays a very important role in your business. Customers will generally go to the business that first comes to their mind to solve a problem. The higher a businesses' engagement with a customer, the higher the probability that particular customer will come to that particular business when in need. So, it makes sense for you as a business to be very well engaged with your customer so that the customer keeps coming back to you to solve their problem.

Many businesses understand the need to be the first choice to solve a problem. And they do it through advertising. But with many businesses advertising, how do you get the customer to think of your business in the time of need? This is where customer engagement comes into the picture.

So what is customer engagement? Customer engagement is the emotional connection between a customer and a brand. Highly engaged customers buy more, promote more, and demonstrate more loyalty.

How do we at Twixor help with customer engagement? We enable you to design and launch campaigns that reach out to your customer. If your campaign is interesting enough to your customer, he can interact with your brand via a customized interaction that you can build and customize for each of your customers.

What is a campaign? A campaign is marketing that extends beyond acquiring customers and aims to identify and market additional products or services to existing customers, retain them as customers, and develop them into advocates.

From the name Engagement Capsule (EnCaps), it's obvious Twixor EnCaps can be used to engage your customers through multiple personalized campaigns. Twixor EnCaps allows you to easily design and send the campaigns to your customers over their commonly used **channels** to make them aware of the awesome offers, services, and product discounts provided by you.

Let's see the steps to create, launch and run a successful marketing campaign (EnCaps) in subsequent topics.

Manage EnCaps

If you are looking out for the next big for the next marketing trend and engage with your customers, get ahead of the game now with **Progressive Web Apps** powered by Twixor EnCaps. **Progressive Web Apps** (or PWAs) are a way for you to give your customers an app-like experience without getting your customers to install a dedicated mobile app. PWAs remove the hassle of asking your customers to go to the App Store / Play Store, search for your app and install it. It will open in your customers' phone's web-browser, no matter what phone they are using, and since it is delivered from the Web directly, you can modify the App as many times as you want without the customer needing to update a dedicated app every time.

In addition to this, Twixor EnCaps is also backed up with a powerful automation engine with which you can delight the customers by sending EnCaps through any channel of your choice.

This page explains the assorted activities associated with the creation and termination of EnCaps. Go through these techniques, it will help you create and delete EnCaps.

Create, Search, and Delete EnCaps

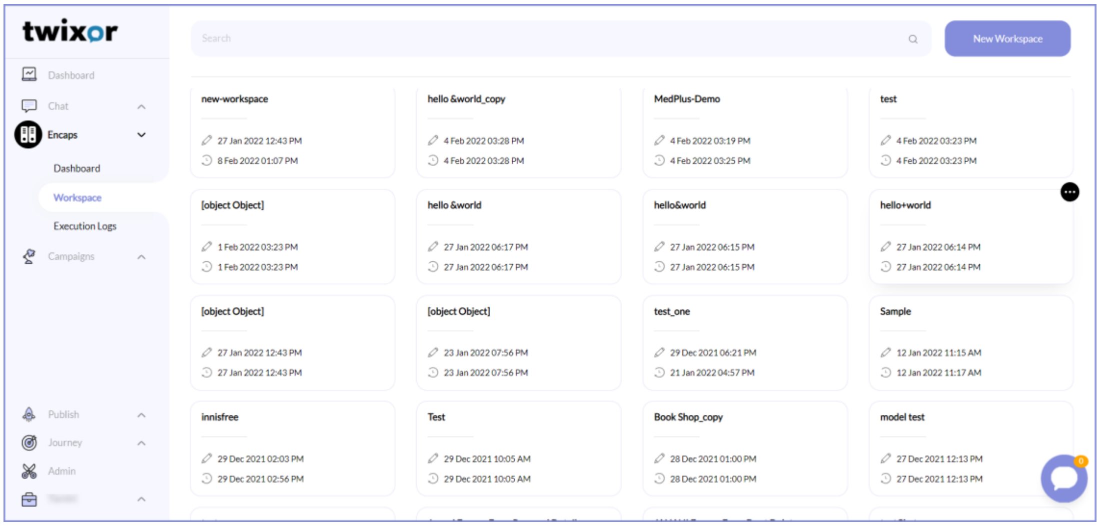
Create an EnCap

In this page, you can create as many EnCaps as you need to engage with your customers to generate as many customer interactions as you need. And, existing EnCaps can also be searched based on the name of EnCap.

Pursue the steps below to create, search, and delete the EnCaps.

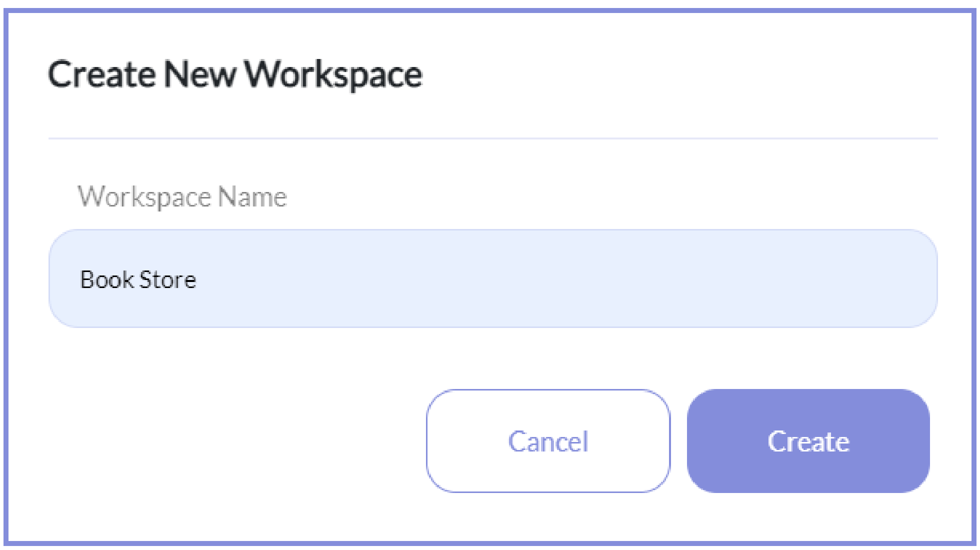
1. Head to **Encaps -> Workspace**.

In this page, you can view the list of already created EnCaps.



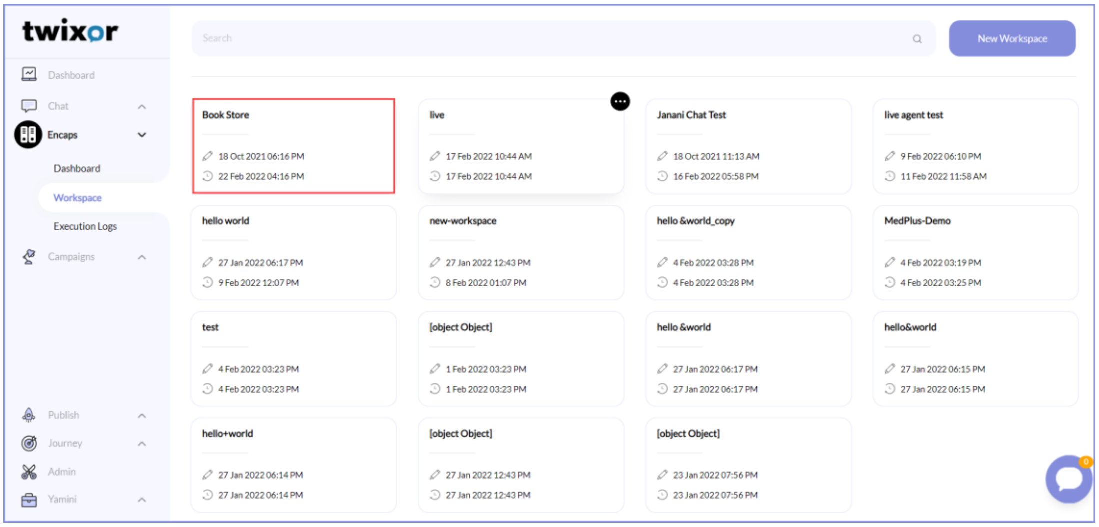
2. Click **New Workspace -> Create** button to create a new EnCap.

3. Go ahead and enter the name of the EnCap as **Book Store** in **Workspace Name** column.



4. Click **Create** to create a new EnCap or **Cancel** to invalidate the action. Congratulations! you have created an EnCap for Book Store.

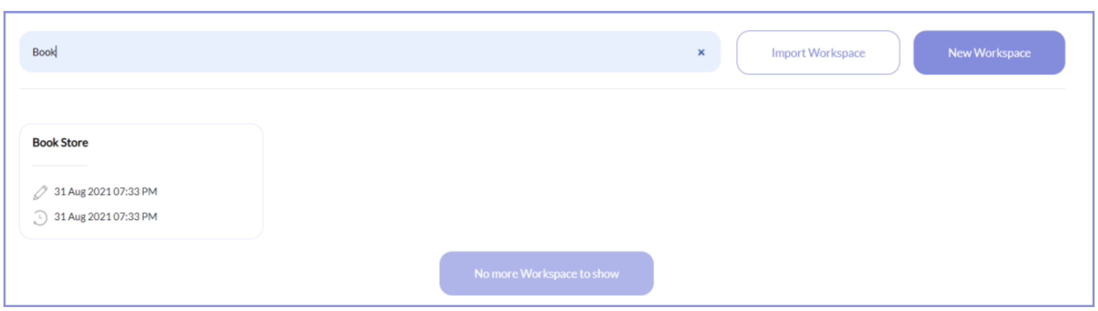
And the **Book Store** EnCap will be displayed in the list of created EnCaps.



5. After the successful creation of EnCap, you can able to design the EnCap work flow by clicking **Open Designer** that will be discussed in the topic **Design Workflow using EnCap Designer**.

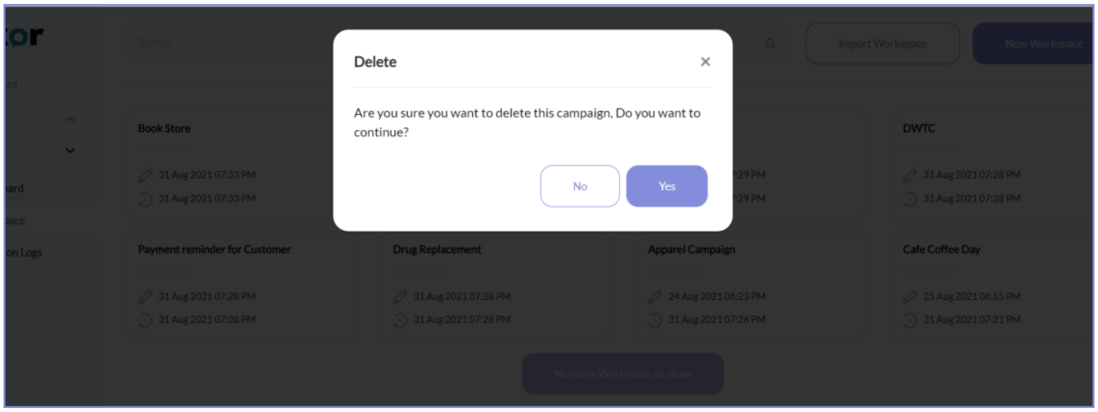
Search the desired EnCap

If you know either a certain portion or full name of the EnCap, you can explore it by entering the EnCap name in the search box.



Delete EnCap

If you don't want the EnCap anymore, delete it by clicking and delete button next to the name of the EnCap. A confirmation message "**Are you sure to want to delete this campaign, Do you want to Continue?**" for deactivating the EnCaps will be displayed. Click **Yes** to delete the EnCap.

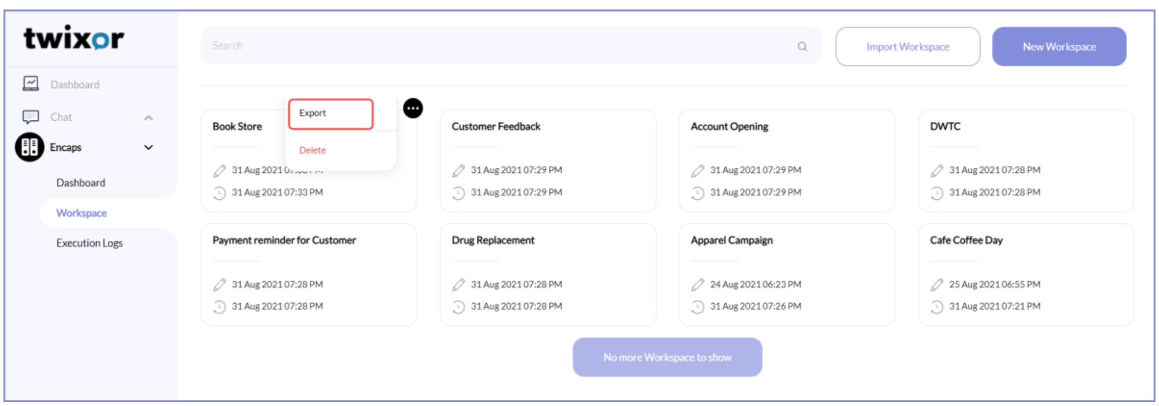


Import/Export the EnCaps

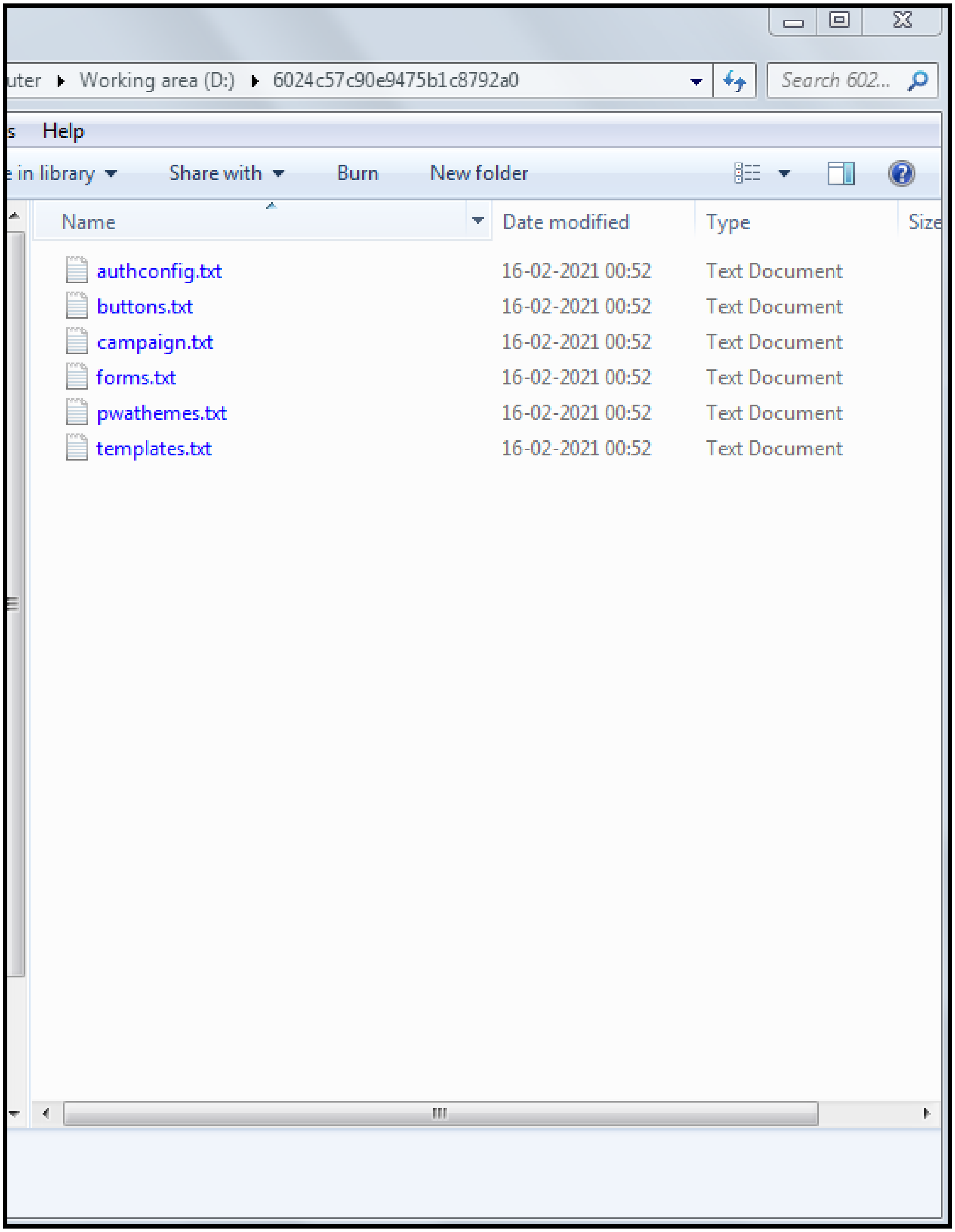
How to export the EnCap

You can also export your EnCap to a .zip file. Since the EnCap backup generates a .zip file, they can be accessed on any device, as long as you have an application capable of accessing them.

- Navigate to **Encaps -> Workspace** main menu and select **EnCaps**.
- Click the icon and Export button next to the EnCap you wish to export.



- You'll view the EnCaps exported to the .zip file containing all the portions of the EnCap - authconfig, buttons, campaigns, forms, pwa themes, and message templates JSON files.

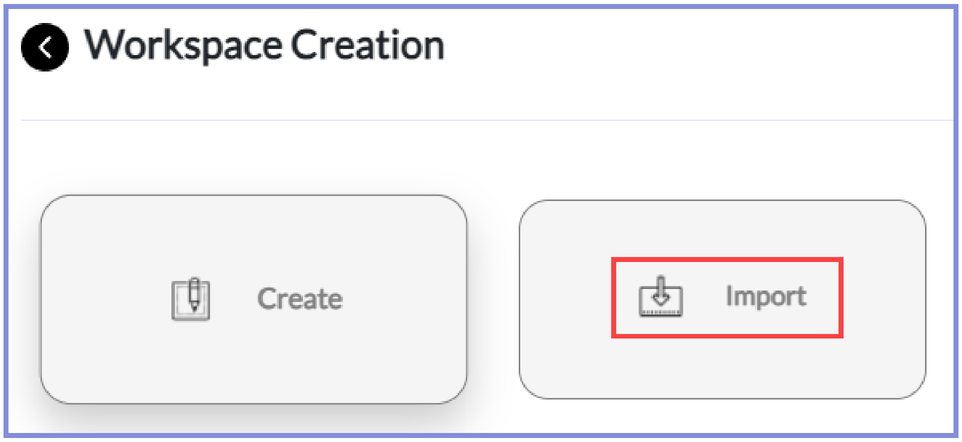


Import your EnCap from the EnCap exports to quickly get started with an EnCap in Twixor.

How to Import EnCaps

- Navigate to **Encaps -> Workspace** main menu and select **Encaps**.

- Click **New Workspace -> Import** button to import the EnCaps.
- Click **Upload a file**, choose the exported **Zip file** you wish to import.



- Click **Import** button to import the EnCap exported in Twixor.

Configure Web hook

Twixor EnCaps offers something that could save your valuable time.

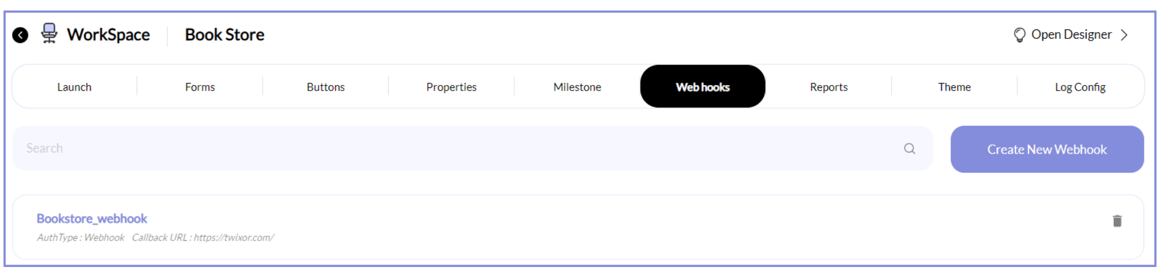
Web hooks are "**user-defined HTTP callbacks**". They are usually triggered by some event, such as a button press or entering some data into a form. When that event occurs, the source site calls URL configured for the web-hook. Basically, what it means is that once the user performs a particular action like pressing a button, you can make sure that a predefined follow on action of calling on another website is performed automatically. For Example, if your campaign has a button to give driving directions be it your business location, on pressing that driving button, Google maps linked to your store address automatically opens up.

Basically, Web hooks allow you to configure your campaign to cause events to trigger a particular behavior on another site. The action taken may be anything. Common uses are to trigger the payment options, to trigger Google maps or to trigger event modules.

To Create new Web hook Configurations

Here are the steps to create web hook configurations to hook either Appiyo or an URL (to trigger an external service) for use in Twixor EnCaps.

1. Tap **Web hooks** from EnCap page. It displays the list of configured web-hooks. Click the particular web hook name to edit the property of web hook or to delete it if you don't want it from here on out. The screen-shot shown below displays the web hook called "Bookstore_webhook" configured for Bookstore EnCap.



2. Click **Create New Webhook** to create a new web hook.

3. To create a new web hook configuration, follow these steps:

- Select the **Auth type** to choose the type of authorization done either through Appiyo or Web hook.

In Twixor EnCaps, you can configure web hooks to callback an URL or execute an event associated with the button when you click an API button.

Appiyo is an external extension of Twixor EnCaps platform. It enables the outside world to interact with Twixor EnCaps. If you want to know more about how to get an Appiyo account and how to use it in your web hook, please reach-out to info@twixor.com and we will be happy to help you.

Create Webhook Configurations to hook Appiyo

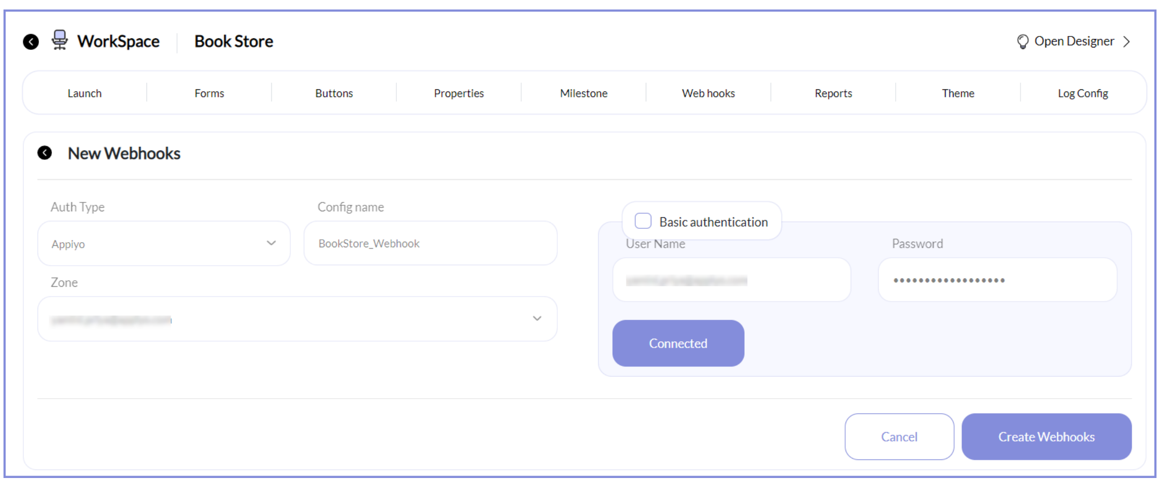
Let us configure a new web-hook for Book Store EnCap using Appiyo.

- If you want to hook Appiyo for, use , select the **Auth Type** as **Appiyo**.
- Enter a name to remember the Appiyo configuration in **Config name**.
- Type the Appiyo user id and keyword in **User Name** and **Password** to authorize your Appiyo account.

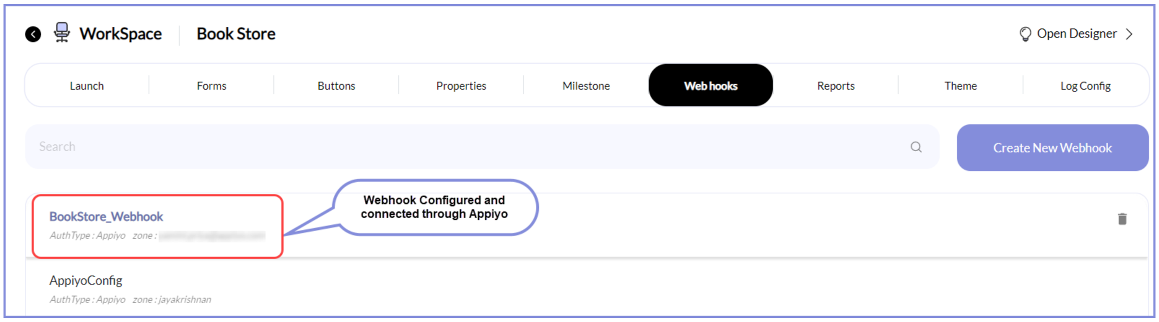
> **Info!** Join Appiyo by creating an Appiyo account before connecting it. If you need help, please write to info@twixor.com and we will be glad to help you

- Click **Connect to Appiyo** to access the Appiyo account. Appiyo will be connected only when you provide valid login credentials.

- Choose the **Zone** organized in Appiyo. Zones are the powerful feature in Appiyo and delimited virtual organizations on the cloud.



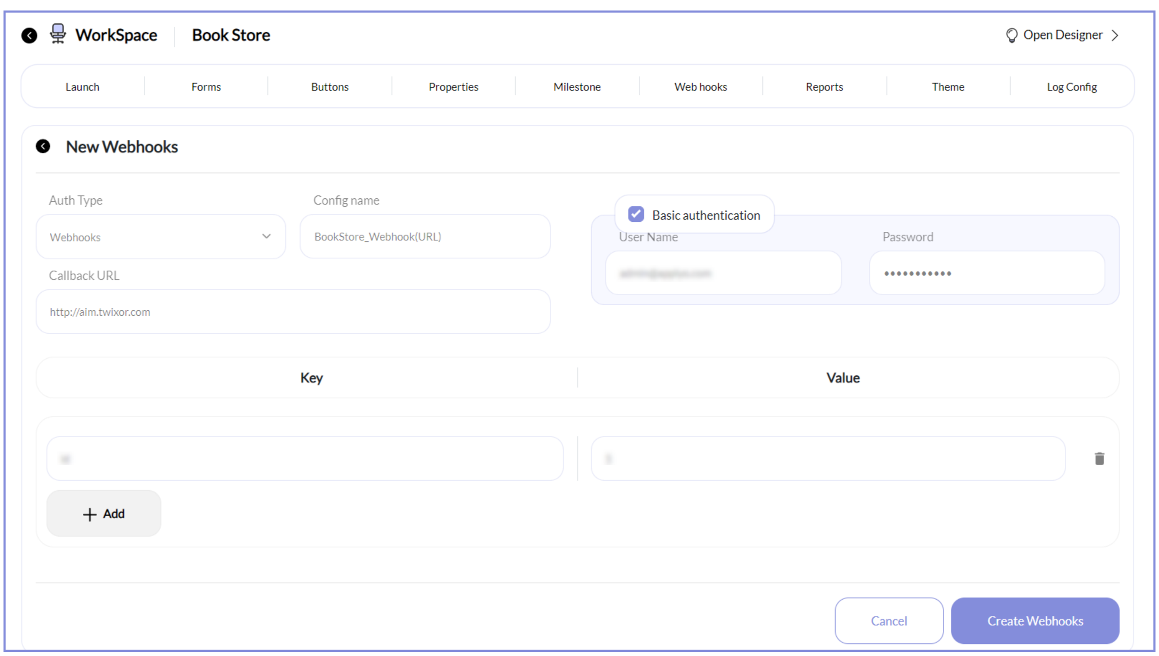
- Click **Create Webhooks** to create the configuration. Appiyo configuration called BookStore_Webhook is created and displayed in the list as shown in the figure below:



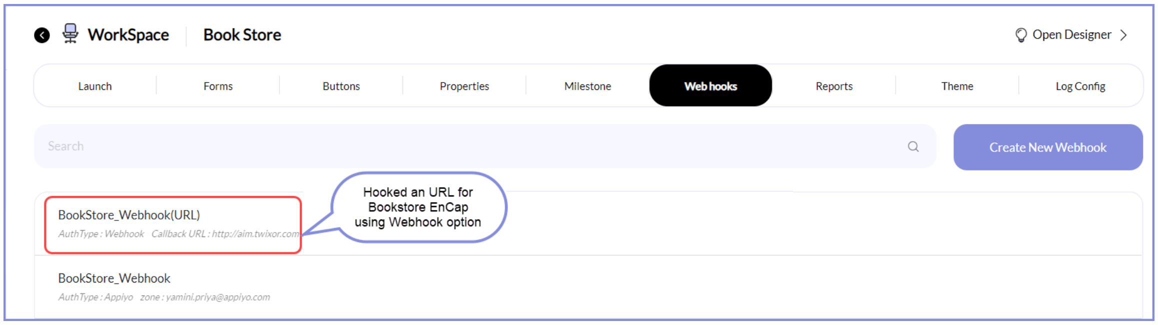
Hook an URL through Web Hook

Let us hook an URL through **Web hook** option.

- If you want to hook a callback URL, select **Auth Type** as **Web hooks**.
- Enter the name for the Web hook.
- Type the URL to be called if an event has occurred in **Callback URL**.
- Provide the authorization credentials for an URL to be called in **Basic Auth**. Click + Add to add a row for key and value parameters to be included in the HTTP post. Click to delete the selected **Key Value pair**.
- Provide the **Key** and **Value** to be posted in the **HTTP callback**.
- After inputting all the values in the corresponding fields, Click **Create Webhooks** to create a new Web hook configuration.



- In the figure shown below, a web hook configuration called **Bookstore_Webhook(URL)** is created and displayed in the list of configured Web hooks.



Create and Delete Forms in EnCaps

Every EnCap needs an actionable form. It lets your customers to share information with you or contact you directly through the loaded buttons embedded within it. Twixor EnCaps comes with built-in controls to create a form with all the required fields.

Let us help you discover that how painless it is to create dynamic forms with Twixor EnCaps using these steps.

Navigation: EnCaps-> Workspace -> Select the EnCaps Name

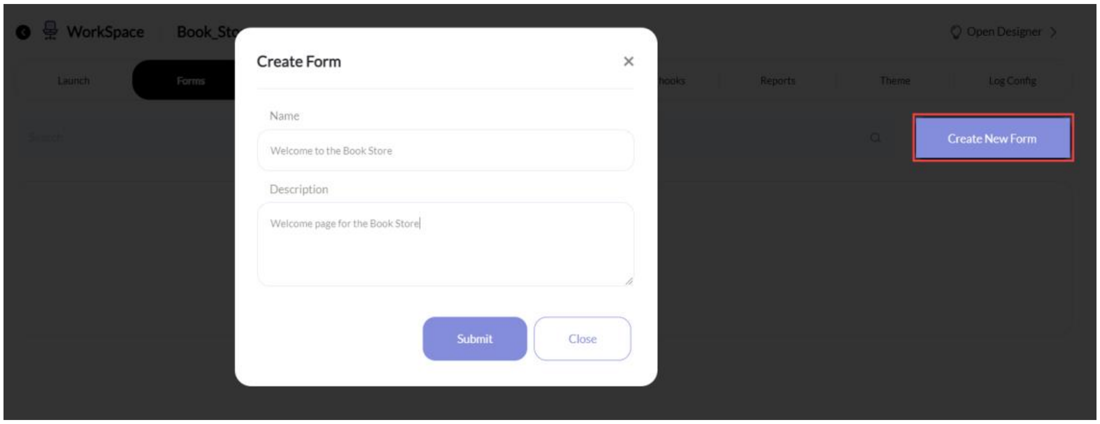
This will open the **Launch History** page of the selected EnCaps.

1. Click **Forms** tab. It displays the list of forms created under the selected EnCaps. You can also cancel the form by clicking option available next to the form name.

2. Click **Create New Form** to create new forms for the selected EnCap.

3. In **Create Form** page, type the form name and description of the form respectively in **Name** and **Description**. Let us create forms for the EnCap "Book Store". It's important to create a landing or welcome page for discussing the single focused objective of the campaigns.

By way of example, a welcome page called "**Welcome to the Book Store**" is created for the "Book Store" EnCap.



4. Click Submit to create a new form. You should view a created form in the list of forms if the form is created successfully.

5. Subsequently, design the form with text, selection, typed, date/time, and other controls like Section, Hidden, File Upload and Rich text controls provided in the palette by **dragging and dropping them** in the work area.

Text Controls

Customers interact with EnCap forms through different types of controls. Text controls here can be used to create text fields like **Text**, **Text Area**, and **Email**.

Text	Field for obtaining plain text input
Text Area	Multi-line input field
Email	Field for obtaining ID of your mail account. **Warning!** If an incorrect Email Id is provided by the user, an error message "Invalid email address" will be displayed

Selection Controls

Using these controls, you can allow the users to complete tasks that involves making choices from a set of statements.

Check box	Tick box field to modify a background or to reply
Select box	Control to enable the selection in drop down list
Radio box	Field to prompt the user to select a single option which is similar to Check box control
Img Choice	Control for letting the users to select an image
Rating	Field to employ user assessment by means of ratings in numbers
Seekbar	Drag-gable thumb control
Multiple Choice	Control that allows the user to give multiple inputs
Checkbox Grid	Grid to group a series of Checkbox questions (Rows) and options (Columns)
Radio Grid	Control for grouping a series of questions and options in radio buttons

Typed Controls

If you want to get numerical input from the user, then use the typed controls. If you provide input other than numbers in **Value** property, it will be marked in yellow color.

Number	Control to get numerical value
Mobile Number	Use this control to obtain the Mobile Number from the user An error message "Invalid mobile number" will be displayed if a user attempts to give an illegitimate phone number

Date/Time Controls

For receiving date/timestamp input from the users, you can use this control.

Date	To get input in Day-Month-Year format
Date Time	Place this control to get both date and time

Other Controls

You can also include other controls like **Section**, **Hidden Control**, and **File Upload**.

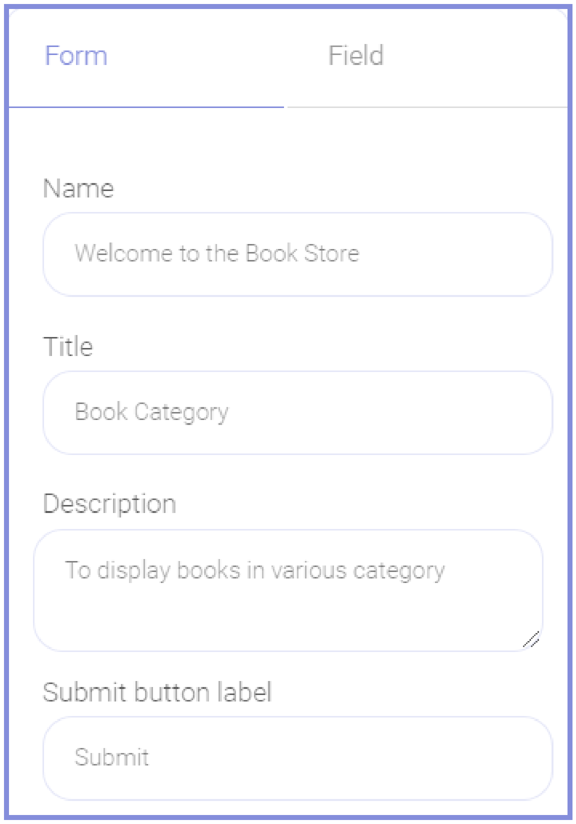
Section	To include different sections in a form
File Upload	Files can be uploaded by using this control
Hidden Control	Used to save the database data that must be updated when an EnCap form is submitted. **Info!** This control cannot be seen or altered by the user
Rich Text	Field for obtaining rich text input

You have to set the form and field properties for every control you create.

In the properties window, click either **Form** or **Field** to edit or view the attributes associated with the selected control.

Configure Form Properties

1. Click **Form** to view the properties of Form. Figure shown below is the properties configured for the Form "Welcome to the Book Store".



2. Form **Name** and **Description** provided while creating form will be displayed in **Name** and **Description** . Give the title for the form in **Title**.

Info! You can also change the Name, Description, and Title for the form anytime

Configure Field Properties

1. Click **Field** to view the attributes of all fields.

2. Click the respective field to view or edit its properties.

Common Properties

Fields incorporated in all the form controls share the common dimensions cataloged below.

Field Name	Description
Label	Display name for the controls
Name	Unique name given to all the controls

Type	Field type and this cannot be changed since it is automatically selected when you choose any field
Hint	Intimation about the field
Value	Enter the value for the controls, which if provided, will be submitted through the form.
Label Alignment	Alignment of the field label. Select any position from the list - Inherit, Top, Left, Right to place the label in the selected alignment
Disable	If you choose this option, the field will be disabled and you won't to able to add value to it
Validation Required	Enable this option to mark the field as mandatory **Info!** If you select this option, * mandatory symbol will be displayed right after the label of the chosen field in the launched EnCap. And, if the input is not given by the EnCap user for this particular field, the warning message "Required" will be showed.

Individual Properties

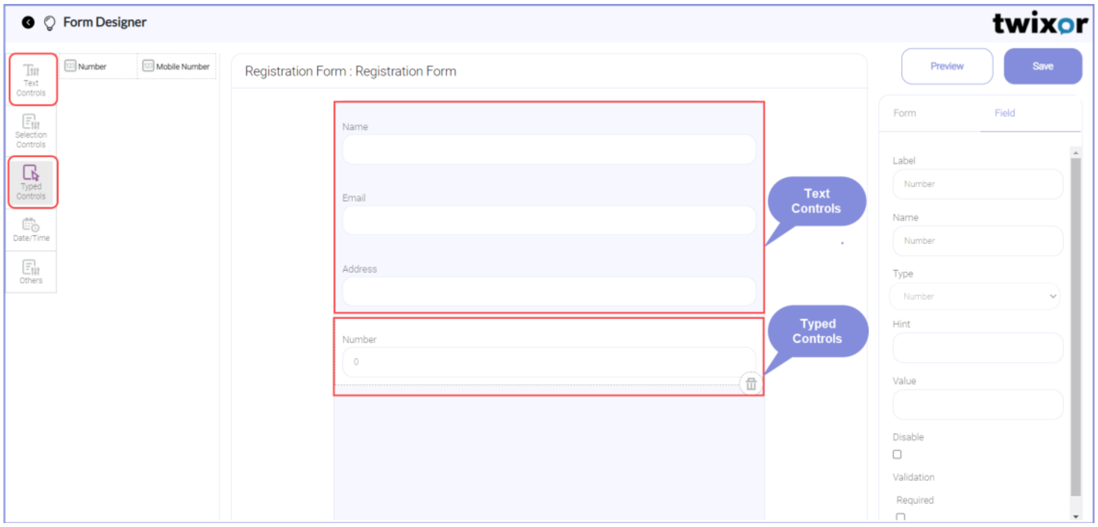
Some fields have unique properties associated with the selected control. These properties are listed here:

Field Name	Control Name	Description
Capitalize Text at	Text Box	This property can be used for changing the case of text (From lower case to UPPER CASE) either at the beginning of a sentence or word or all the characters of the word/sentence
Field Layout	Radio Box	This dimension comprises three choices to design the radio box: **Single Column** displays the radio button choices in one column, **Two column** for dual columned radio choices, and **Three column** for presenting the radio options in three columns

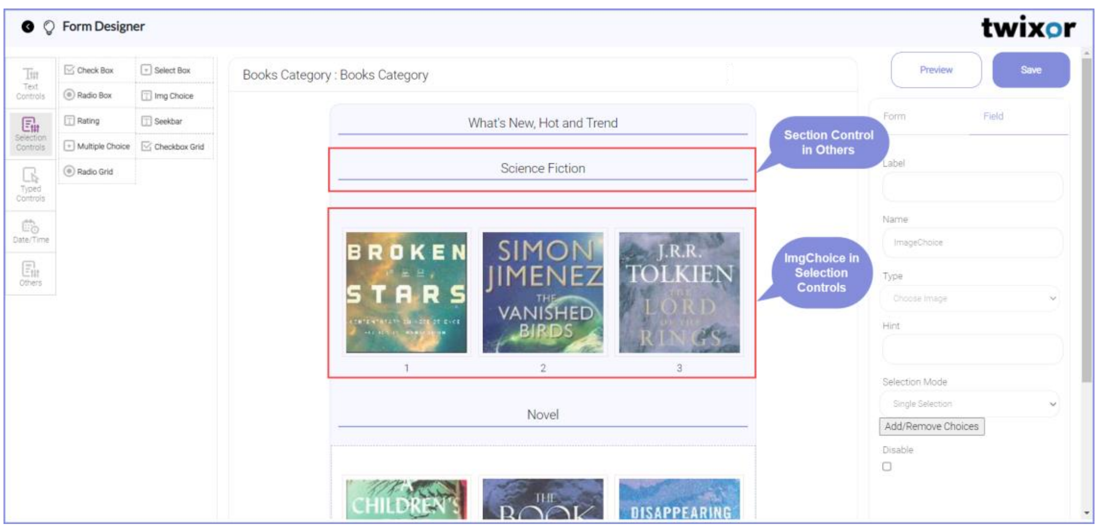
Options	Select Box and Multiple Choice	In this attribute, you can enter the options to be displayed in **Select Box** and **Multiple Choice**
Image Choice	Img Choice	This attribute is for setting the mode for images. **Single Selection** option allows you to select one image whereas **Multiple Selection** is for facilitating the user to select more than one image
Add/Remove Choices	Img Choice	**Img Choice** property allows you to include or remove the image options. Paste the URL of the image here to fetch that particular image from its source
Range	Rating	Range property is for obtaining user **rating** in numbers
Value	Seekbar	This property is for extending the drag-gable thumb/**Seekbar** to a given value
Min and Max	Seekbar	Minimum and Maximum extension of **Seekbar** can be provided using this attribute
Step	Seekbar	To set the **Seekbar** interval, use this property
Result Label	Seekbar	This is to assign a label for the **Seekbar**
Rows	CheckboxGrid and RadioGrid	This property is for framing the questions in **checkbox and radiobox grids**
Columns	CheckboxGrid and RadioGrid	This is for providing the answers/options for the selected questions defined in **checkbox and radiobox grid controls**

Example:

Let us create forms for the EnCap **Book Store** using the controls provided in the palette. For example, the **Registration Form** for registering the new customers can be created with the text and typed controls as shown below:

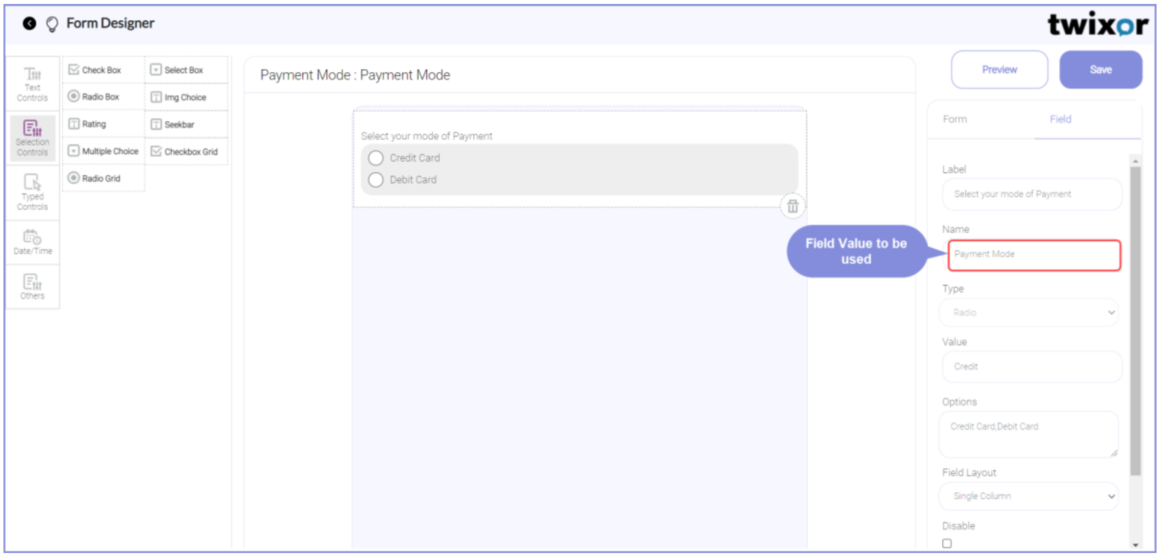


Another form called **Books Category** can also be created to allow the users to browse the books by genre. Below shown is the Books Category form created by dragging and dropping the **Section** and **Selection** controls.

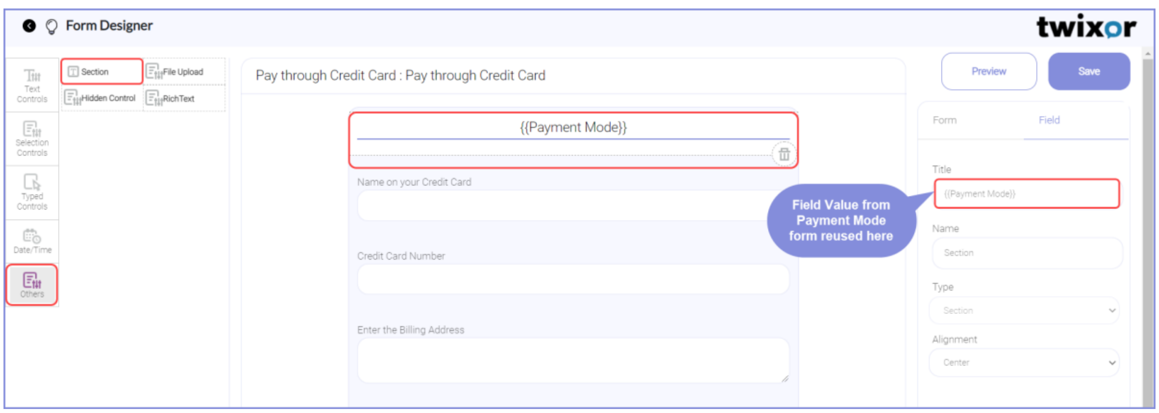


Set Values in Form Fields

You can easily reuse the form fields value from one form to another form by giving the name of the data key within double curly brackets {{Data key name}}. For an instance let's take the form called **Payment Mode** from Book Store EnCap. This form enables the user to select the mode of payment like Credit Card or Debit Card.



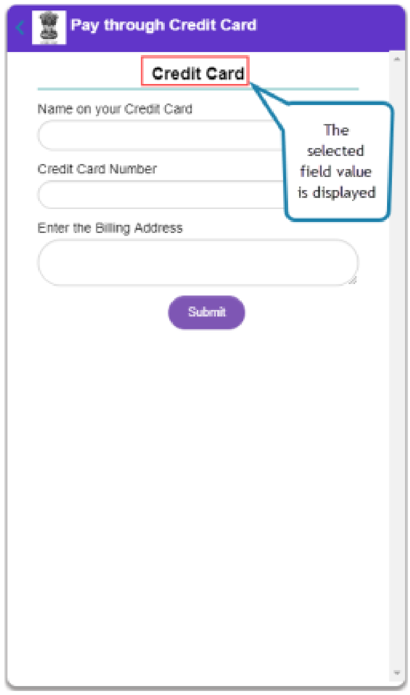
The radio control field name **Payment Mode** can be reused in other form called **Pay through Credit Card**.



A new section control is added and its label is set as the field value from **Payment Mode** form.

Output:

When you click credit card option, the corresponding option will be displayed as the label for the **Payment through credit card** form in the EnCap launch.



After creating the forms, you have to create **Buttons** for using them in EnCap forms since buttons are required to change the action of the forms when they are clicked.

Create Buttons

Overview

Are your customers are bored of typing in a small window in the campaigns they receive? Twixor EnCap's loaded button feature which comes built-in in the Actionable Instant Messaging will enable them to choose what they want to do. For example take a case where you are requesting payment from your customers for the service provided by you. If you send a message regarding payment, they have to sign in into third party website and make the payment. This is an indirect and time consuming process.

In order to solve this issue to an extent, Twixor EnCaps allows you to embed a button in the messages you send. In the above mentioned case of requesting payments, when your customers press this transaction enabled button "Pay", the device will perform a logical operation related to payment as programmed within the button inside a EnCap. The forms associated with the buttons will be enforced instantly.

Configuring Buttons

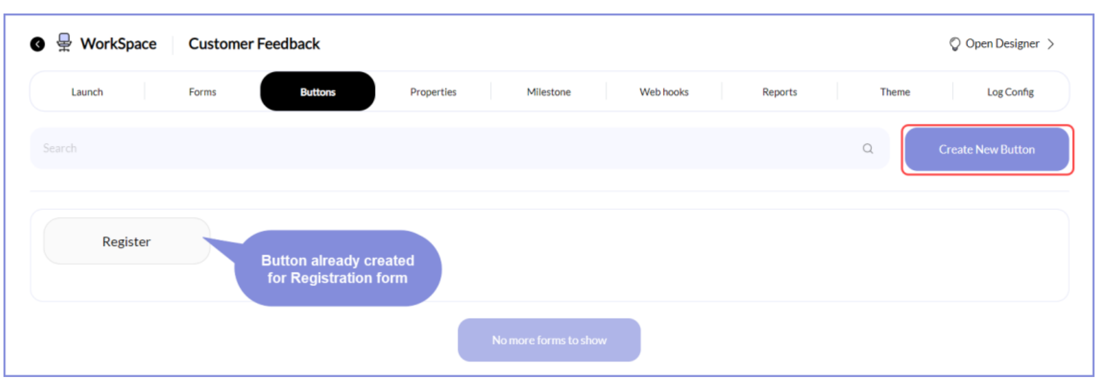
Here we'll create the buttons required for the EnCap Forms.

Perform the steps below to create a loaded and actionable button for use in forms.

1. Select an EnCap to which you want to create and configure the button. For example, select the **BookStore** EnCap created by us.

2. Click **Buttons** tab. This will open the list of the buttons used in the selected EnCap "Book Store".

3. Click **Create New Button** to create a new button for the chosen EnCap.



Create a New Button

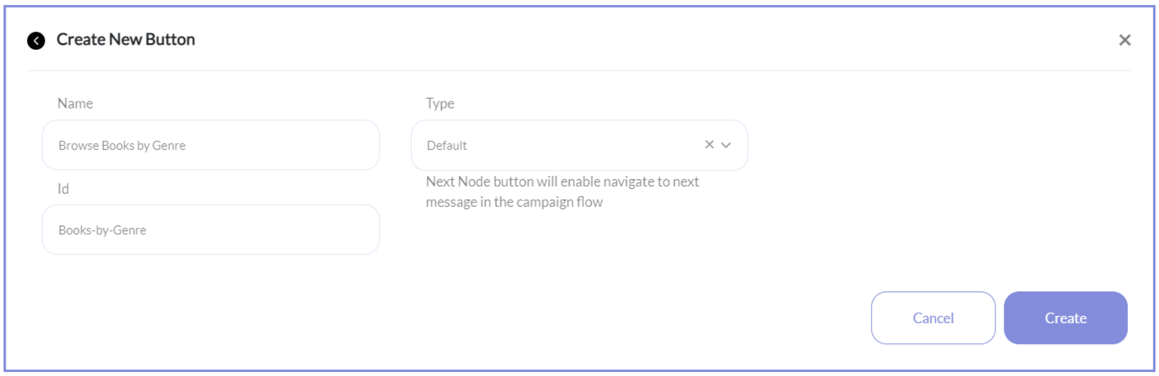
Creation of a new button involves the following steps:

1. After clicking the **Configure Button** option, enter an identity for the button in **Name**.

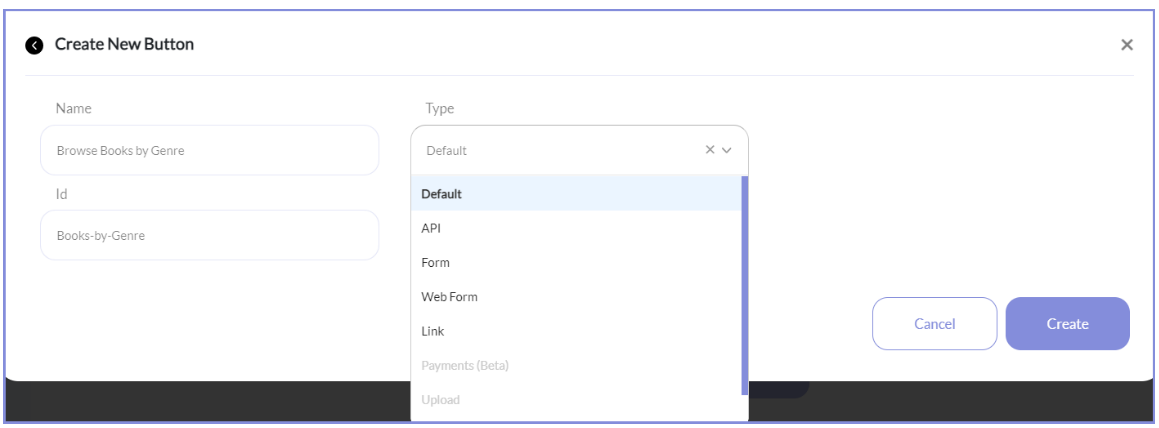
Let us give a name for the button as **Browse Book by Genre**

2. Provide an unique description for the button in **Identifier**.

Warning! The button identifier should be at least 1 to 25 characters and must start with an alphabet



3. Select the type of the button from **Type**.



The button type and its characterization available in the current version is enlisted in the table below:

Button Type	Description
Default	Button to go to the next page

API	Button to make API calls
Form	Button for opening Forms created in Twixor EnCaps
Web Form	Button to open external web form
Link	Button to load the URL

Creating different types of button involves different types of configurations:

Default Button

The default button type is **Default**. Click **Default** option if you want to use **Next** button for navigating to the next page in the campaign flow.

API type Button

Selecting **API** button allows you to call an API when you click it.

If you want your button to call an API, you have to first connect the API to a data source. Follow these steps to connect the API to Appiyo or Web hook data source.

To know the ways to hook either Appiyo or other URL, you should read our guide on Web-hook Configurations.

Data-sources refer to any system that can provide or receive data required for a workflow.

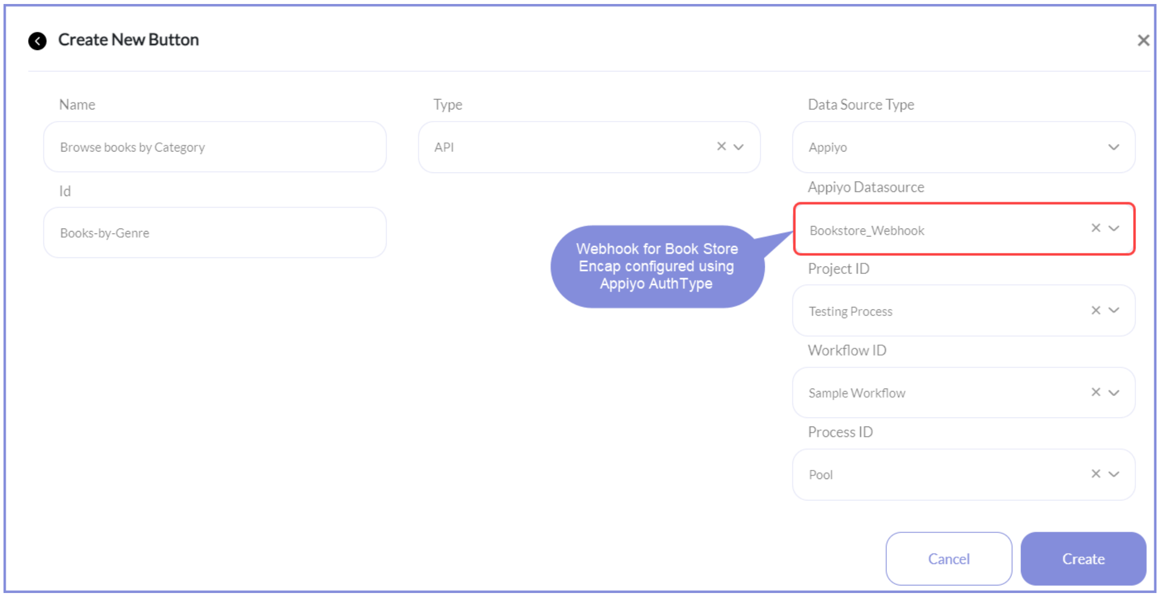
To connect to an Appiyo Data source

If you select the Datasource Type as **Appiyo**, follow these steps:

- The datasource name can be selected from **Appiyo Datasource**.
- **Project Id** denotes the identification for the selected project where the work flow for the button (in Twixor EnCaps) is defined in Appiyo.
- Select the unique work flow id for the button under the chosen project from **Workflow** Id.
- Choose the action executed when the button is clicked for the selected workflow from **Process Id**.

Note! The button action (process) will be defined in the **Script task** within the pool.

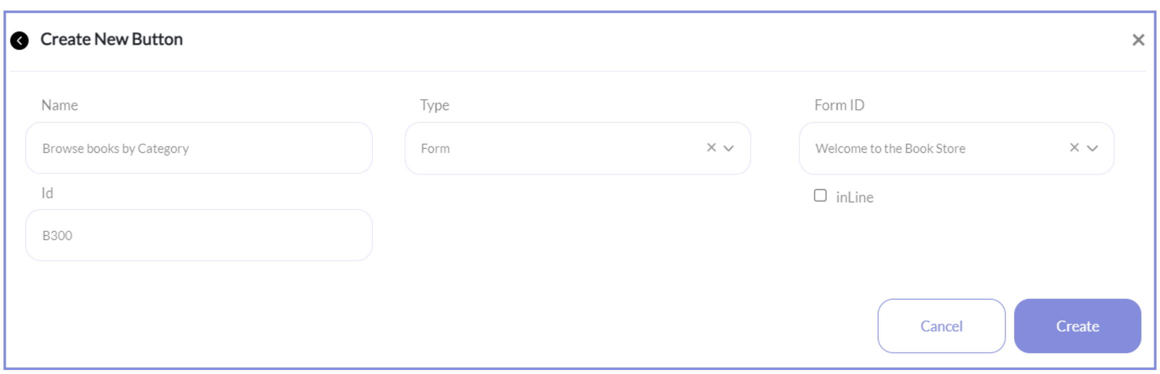
For example if you want to use **Appiyo** Datasource for Book Store EnCap, select the Datasource Type as **Appiyo**. The option to select the Appiyo Data source will be enabled automatically. For Book Store EnCap, we have configured a webhook called **BookStore_Webhook1** using Appiyo.



Form Button Type to open EnCap Forms

Select **Form** to choose the forms designed using Twixor EnCaps and enter the Id of the form to be executed in **Form Id**.

- If you want the form to be displayed within the same page, enable **Is Inline** option.

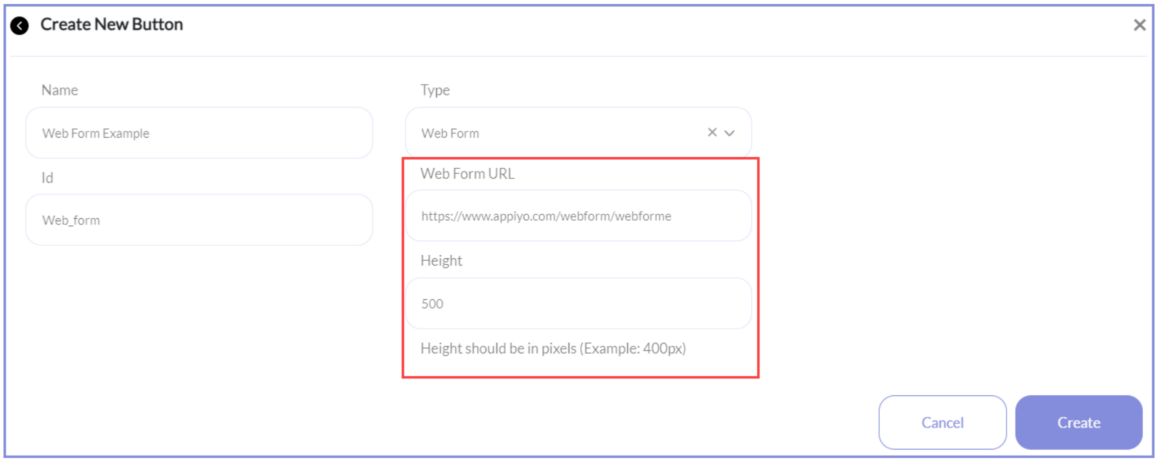


Web Form Button

Click **Web Form** type to open an external Web Form or HTML form within the EnCap.

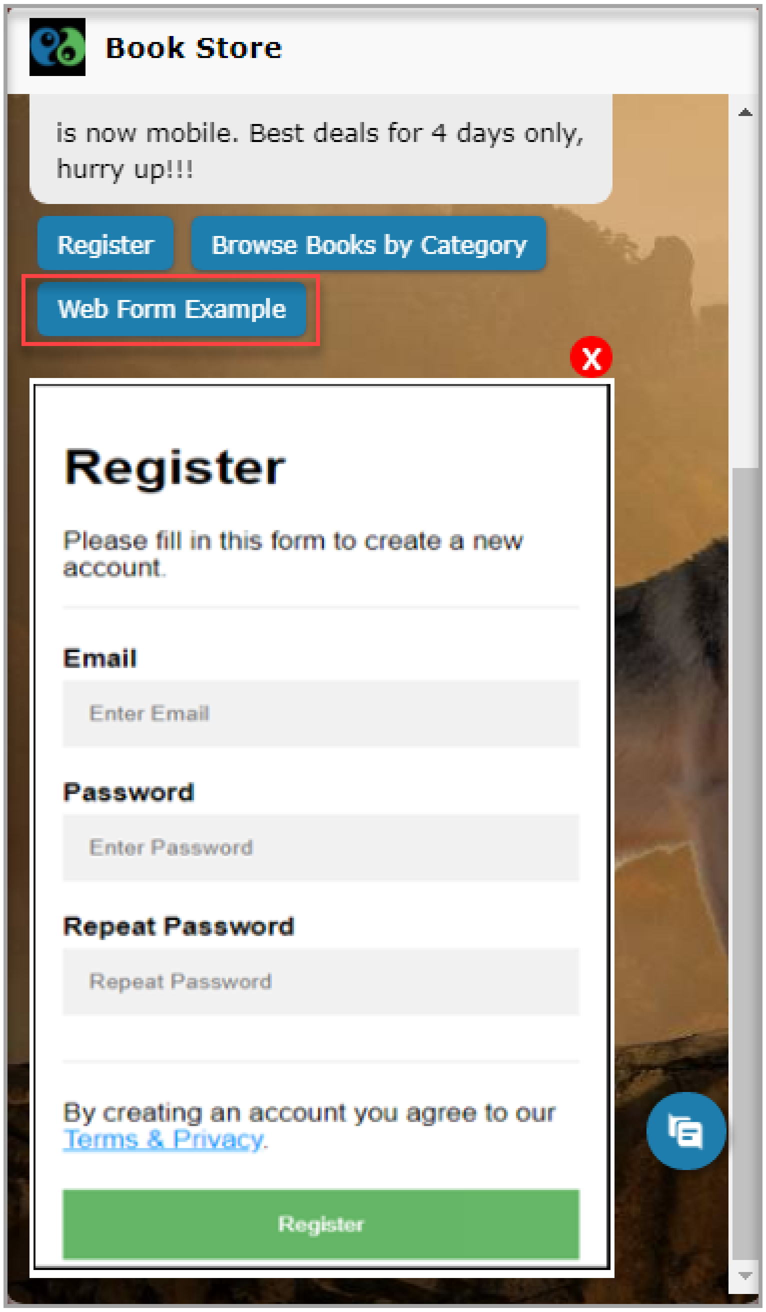
For example, let's call an external Web Form that can be used to register a new customer.

To do so, provide the URL to fetch the web form in **Web Form URL** and **Height** of the web form as given below:

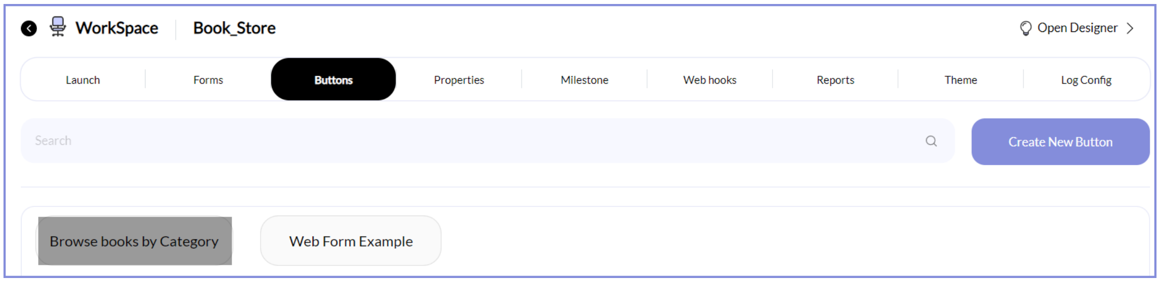


In this example, we've used the HTML to open the registration webform.

When you click this **Web Form Example** button we created here, the EnCap output will look like:



4. Finally click **Save** to create a new button or **Cancel** to demolish the button creation process. **Browse Books by Category button** is created and displayed on the list as shown below.



5. In similar manner, create **Pay** and **Provide Payment Details** buttons for the Book Store EnCap to enable payment.

6. You can also edit and delete the selected button configuration by clicking ->

.

7. Search the buttons by entering its name in **Search** field.

Design Work Flow using EnCap Designer

Before starting the topic on creating work flow for Twixor EnCaps, let us first dig the importance of EnCap work-flows. The workflow's prime objective is to aid the businesses in preparing and automating trade campaigns. Moreover, it allows you to effortlessly design even the complicated campaigns in seconds.

Make your customers to adore your campaigns. This can be accomplished by launching the **EnCap Designer** incorporated in **Twixor EnCaps**. With this feature, you can structure the campaign flow within few minutes.

1. After creating an EnCap, you will be prompted to design the work flow for the created EnCap.

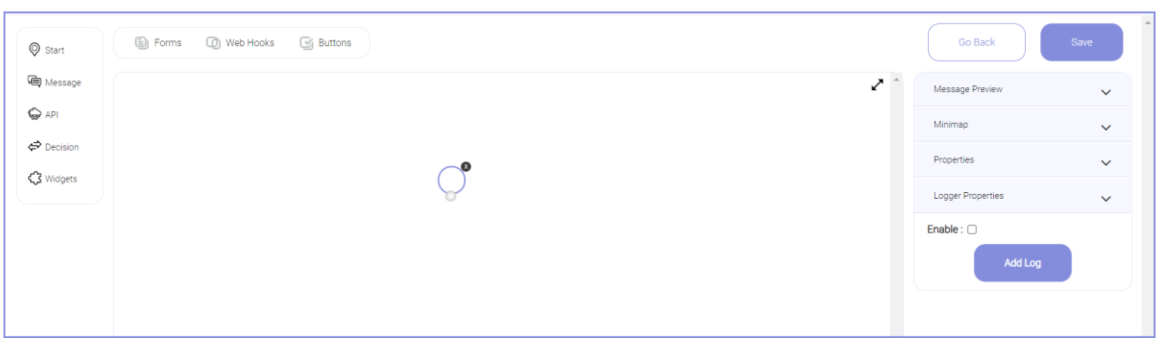
2. Configure webhooks, design the EnCap forms, and create the buttons before designing the work flow for EnCaps.

3. Click **Open Designer**.

4. Drag and Drop the required nodes from the design palette for scheming the activity flow of EnCap.

5. Let us now design a work-flow for the Bookstore EnCap.

6. First, start designing the EnCap by dragging and dropping the **Start** node in the design area.



Warning! An alert will be displayed if you try to place two start nodes in single EnCap design

7. After that, drag and drop the message node to the design area. Connect the **Start** and **Message** nodes by an arrow. This can be done by clicking and dragging the end point of the start node.

> **Info!** This message node placed after the start node act as a welcome message for the EnCaps

This process is explained in the video below:

> **Info!** The relationship between the two nodes is indicated by an arrow

Create message templates for the EnCap by following the steps illustrated in the guide **Creating Message Templates for EnCap**.

Creating Message Templates for EnCap

Follow the steps below to create the message templates required for scheming the activity flow of EnCaps.

- Click in **Message** node to create a new message template.
- In **Create message template** page, enter an unique identifier for the message in **Message Identifier**.

> **Info!** Message Identifier is the name given to the message

- Type the **message** to be displayed in the welcome page of the EnCap. Whether you're creating the EnCaps for a booking reminder, delivery update, or a Black Friday offer, short and sweet is the recipe for success. Create the message that is short, succinct and well within 160 characters. As a rule of thumb, 100 characters is the optimum amount.

  The message can be a rich text, plain text, image, any media, or cards.

Message Template	**Description**
Text	Plain Text Message
Rich Text	Message with different font and formatting styles **Rich Text Options** - Apply bold effect to your text - Make the text Italic - Insert hyperlink to text - To add code snippets to your text - Option to add quotations to the text that span multiple times - Displays the text in unordered (bulleted) list - Lists the text in numbers

 - Expand this option to add multilevel headings (h1, h2, and h3) to the text

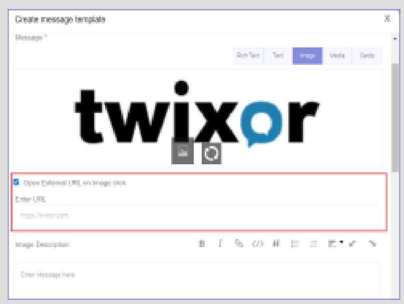
- Used to reverse the text in its older state

- Option to redo the text over again

Image

Message comprising Image with its description. You can click **Add Image here** to browse the location of the image and to insert it here

Info! Click **Open External URL on Image click** option if you want to open an URL when you click an image. Enter the URL to be opened in **Enter URL** field.



Media

Diverse sets of media inclusive of videos, audios, etc.

Select **Upload** option to load the media from your local drive or you can upload the video from You-tube using **From YouTube** option by giving its URL in **YouTube URL**.

Info! You can click **Add Media here** under **Upload** option to insert the media from its location

Cards

Attach Rich photos, media, and description.

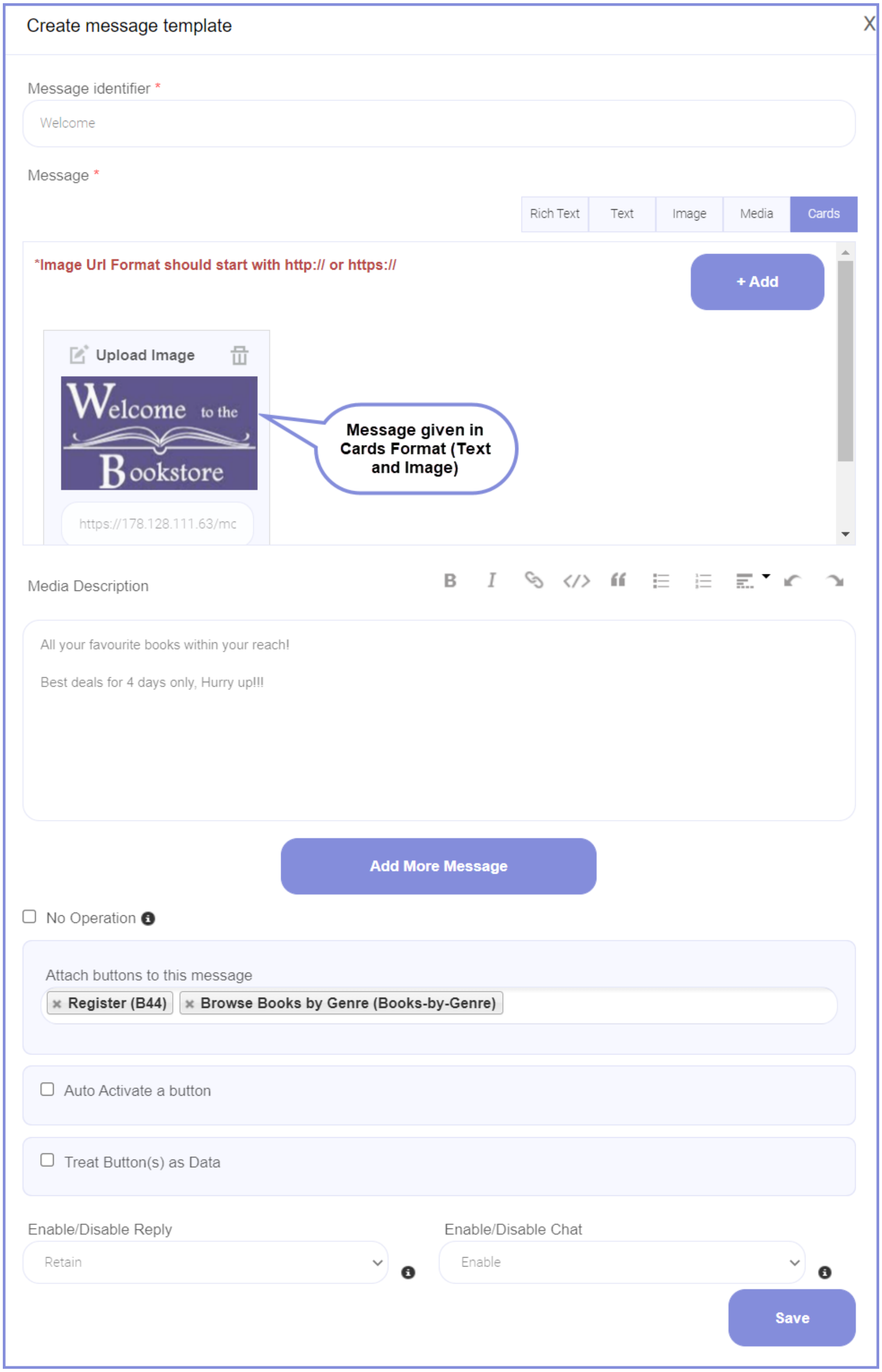
Click **Upload Image** to pass the image from your drive. You can also edit and delete the card image by clicking its appropriate icons and .

Give URL of the image in **Enter Image URL** to load the image from web.

Enter the URL to be hyper-linked with the image in **Enter Link url**

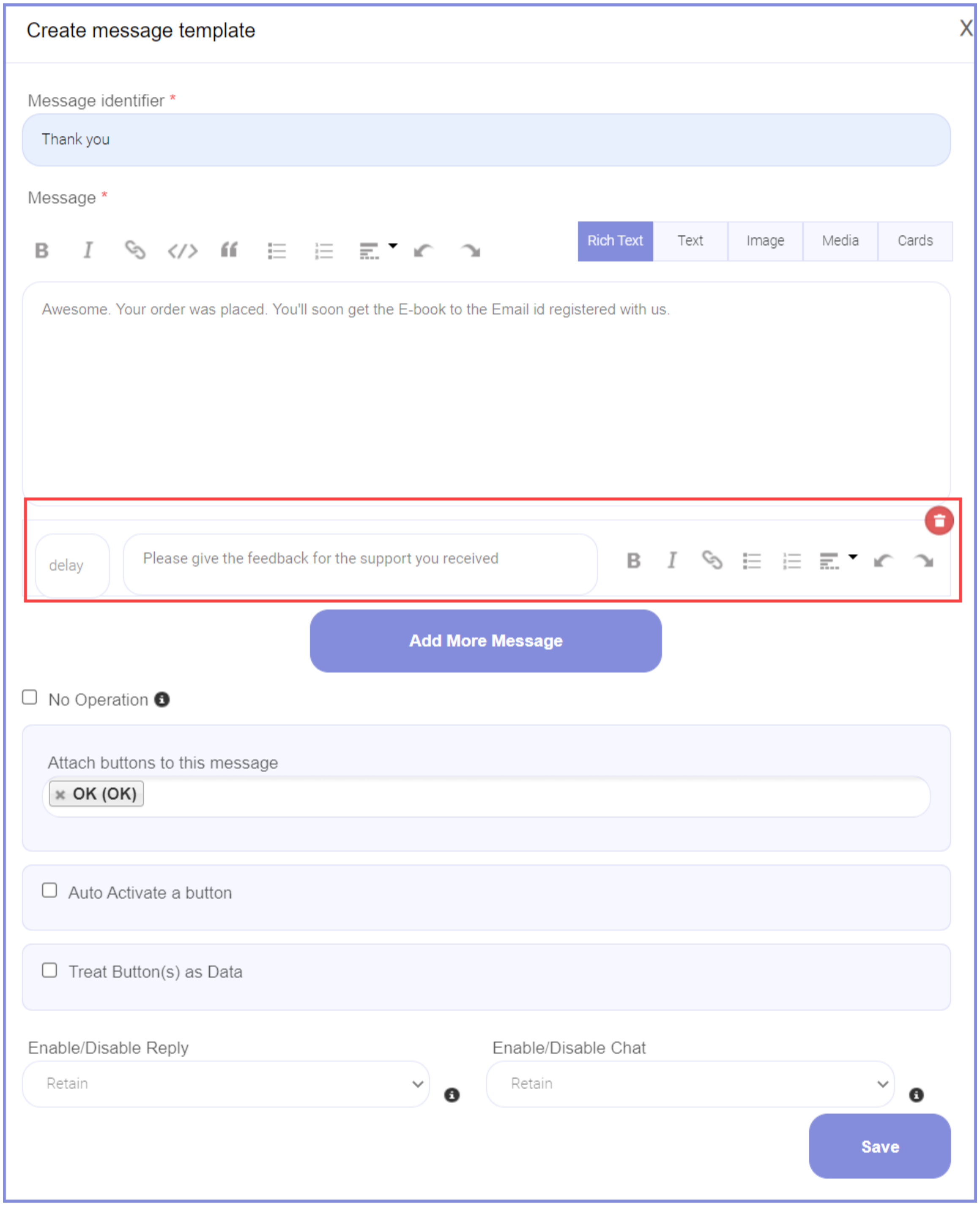
Warning! Image URL Format should start with http:// or https://

Begin by creating a welcome message for the Book Store EnCap as a **Card**. To do this, click **Cards** option to create the welcome message containing both image and text.


Create message template
X
Message identifier *
Welcome
Message *
Rich Text
Text
Image
Media
Cards
*Image Url Format should start with http:// or https://
+ Add
Upload Image
Welcome to the Bookstore
https://178.128.111.63/mc
Message given in Cards Format (Text and Image)
Media Description
All your favourite books within your reach!
Best deals for 4 days only, Hurry up!!!
Add More Message
No Operation
Attach buttons to this message
Register (B44)
Browse Books by Genre (Books-by-Genre)
Auto Activate a button
Treat Button(s) as Data
Enable/Disable Reply
Retain
Enable/Disable Chat
Enable
Save

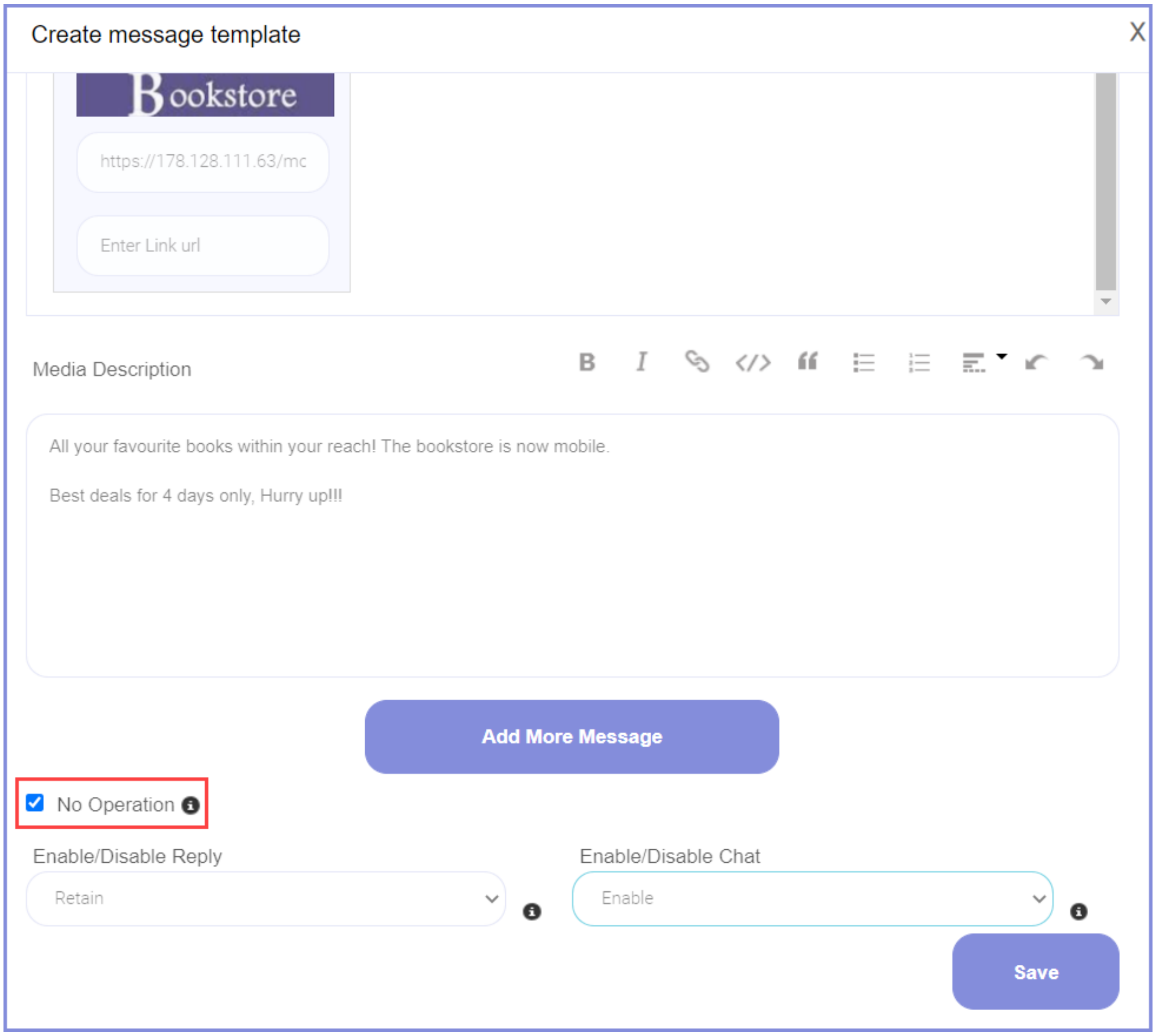
Add More Messages

- Click **Add More Messages** to display any information in addition to the main message. Provide the **delay** in seconds to display the additional message after a certain set time.



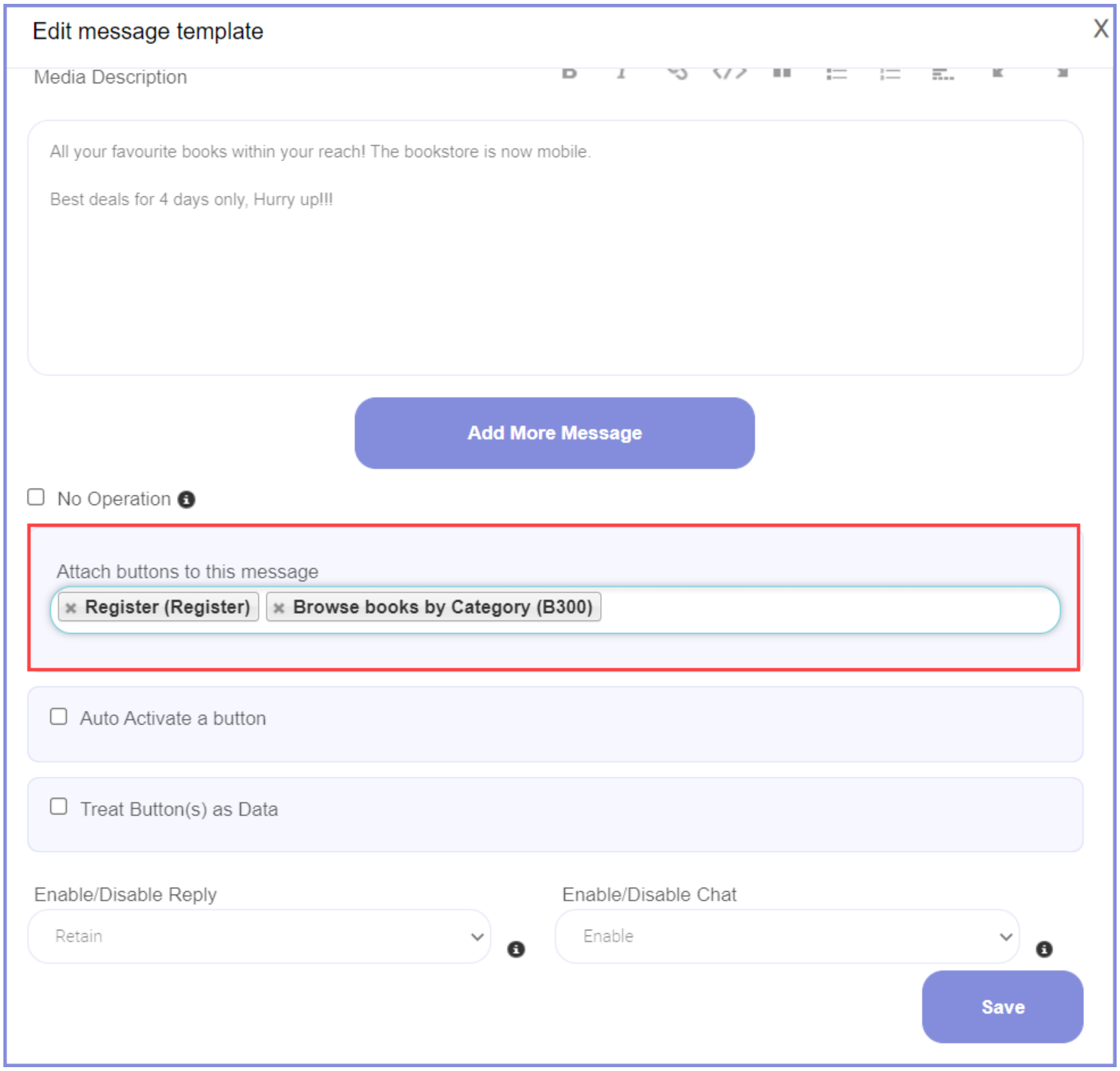
No Operation

You can select **No Operation** option if you don't want the user to do any action in EnCap. If you select this option, you cannot attach any buttons to this message and the conversation will move on to the next message without any user interaction.



Attach Buttons to this message

- Click on the **Attach buttons to this message** field to attach the buttons for this message. Here we have included two buttons namely **Register** and **Browse Books by Category**. These buttons belong to **Form** button type about which you can refer to **Create Buttons** guide.



Auto-Activate a Button

Do you want to activate a button automatically when the page loads? You can do this by employing the **Auto-Activate button** feature that allows you to add the auto-click button in your message at the selected period.

- Enable **Auto Activate a button** checkbox and attach a button that can be executed automatically.

- You may set a **delay** (in seconds) if you want to auto-click the button after a pause.

Treat Button as Data

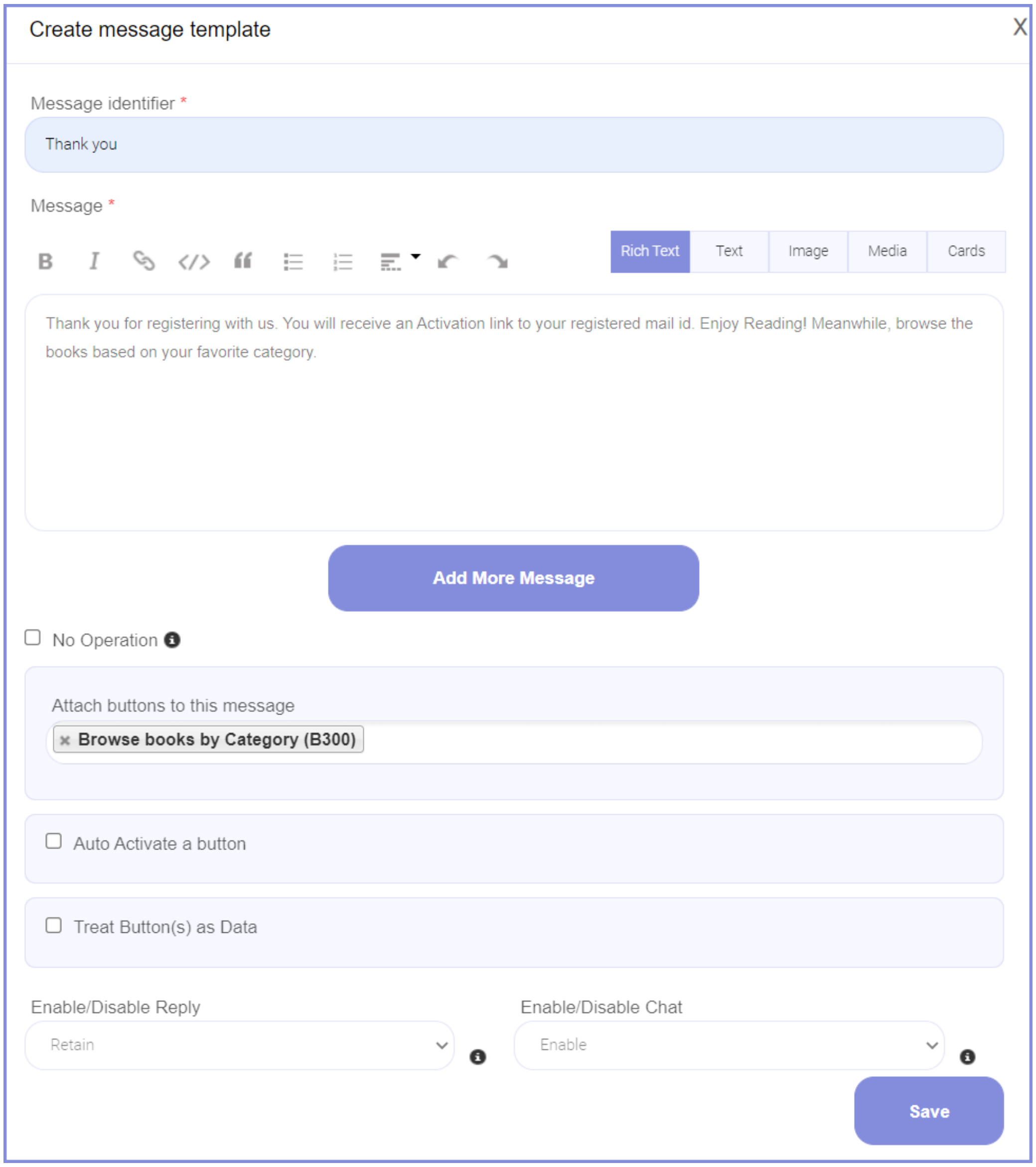
- Click **Treat Button(s) as Data** to save the button as data. It should be noted that the **Message Identifier** given for this template will be taken as the **Key** for this data.

> **Info!** This data will be displayed in the **Form Report** for reference

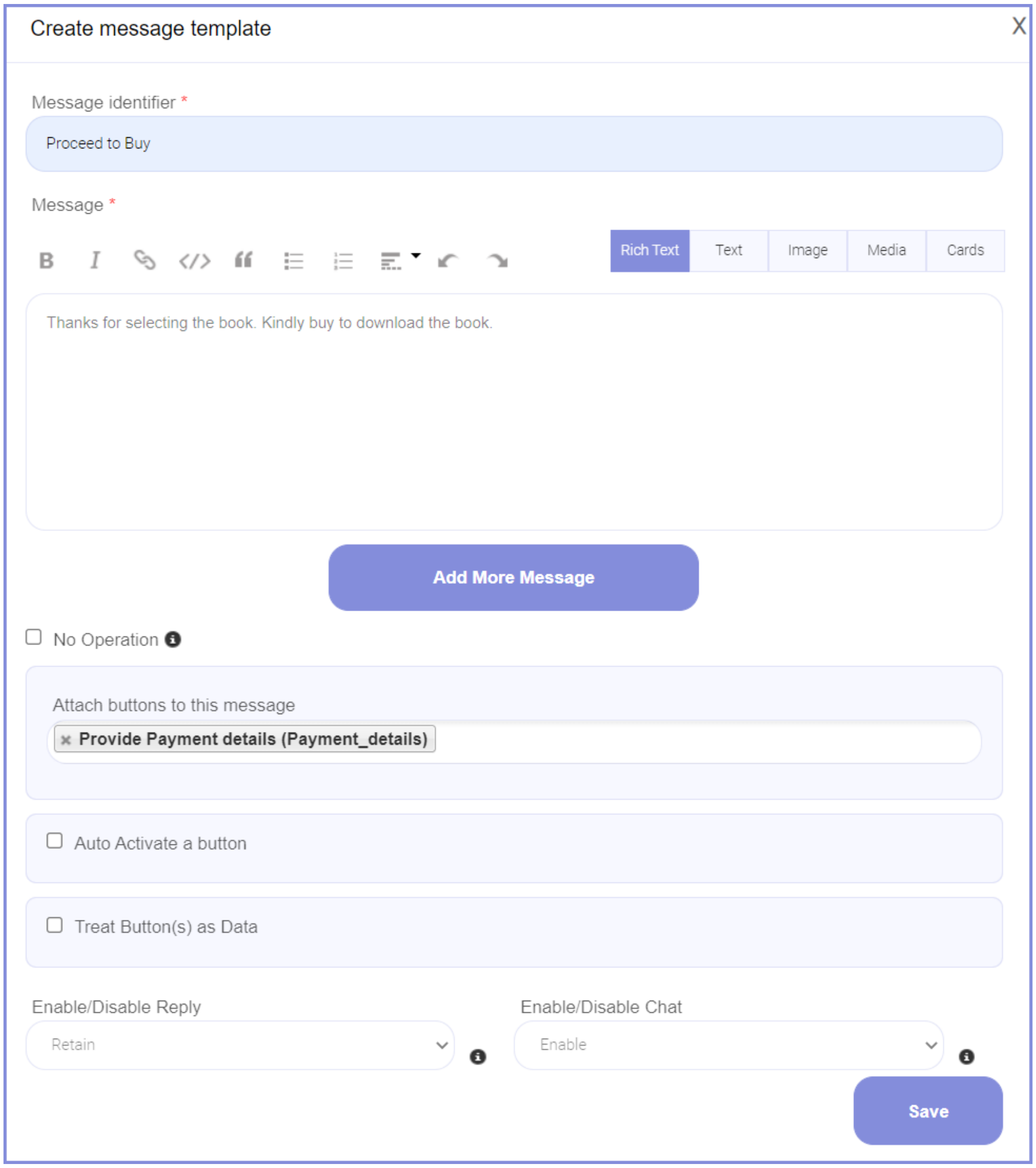
- From the **Retain/Enable/Disable reply box**, select the options to configure the reply box.
  - Select **Retain** to bear the existing state of the reply box
  - Choose **Enable/Disable** options to either enable or disable the reply box from the PWA message respectively
- To **Retain/Enable/Disable chat icon** from the message, select any one of the options given below.
  - Choose **Retain** option to hold the existing state of the chat icon
  - Select either **Enable/Disable** option to open or close the chat icon from the message
- Click **Save** to save the message template.

In the same manner, create templates for other messages used in the EnCap.

Below shown is the **Thank You** message template that will be displayed after the registration.



Below displayed is the **Proceed to Buy** template to ask the customers to pay for the books they selected by clicking the **Pay** button.



If you want to take any decision based on certain conditions, you can do it by placing the **Decision Node** in the workflow as explained in the **next** guide.

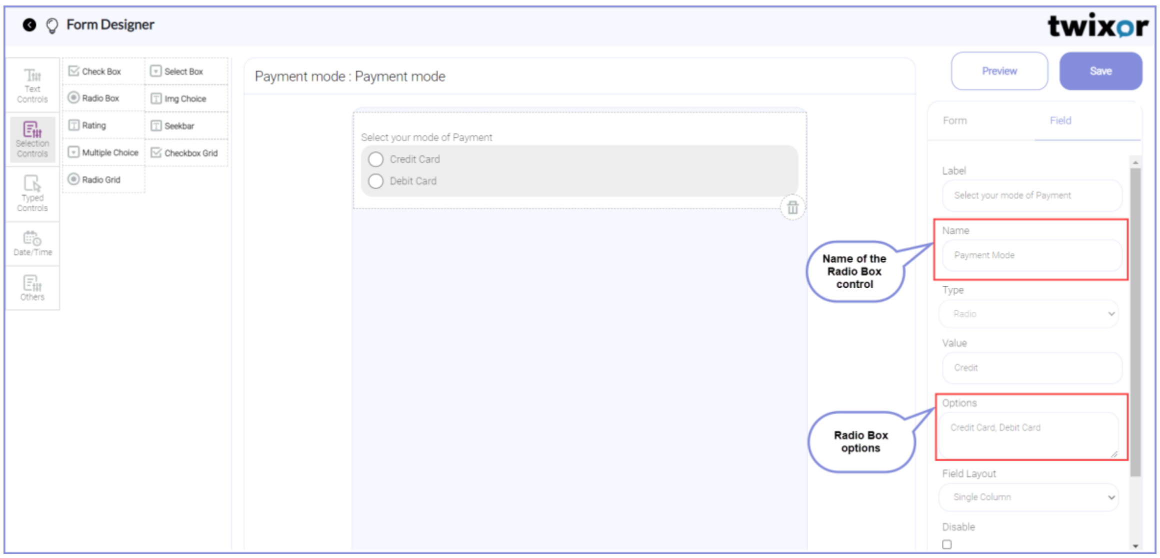
Decision Node

Different decisions can be made and different branches can be taken based on certain conditions using **Decision Nodes**.

For example, in the Book Store EnCap, you can give the options to your customer to select their mode of payment after their precedence to buy the books using a **Decision Node**.

Click in decision node to add a new condition.

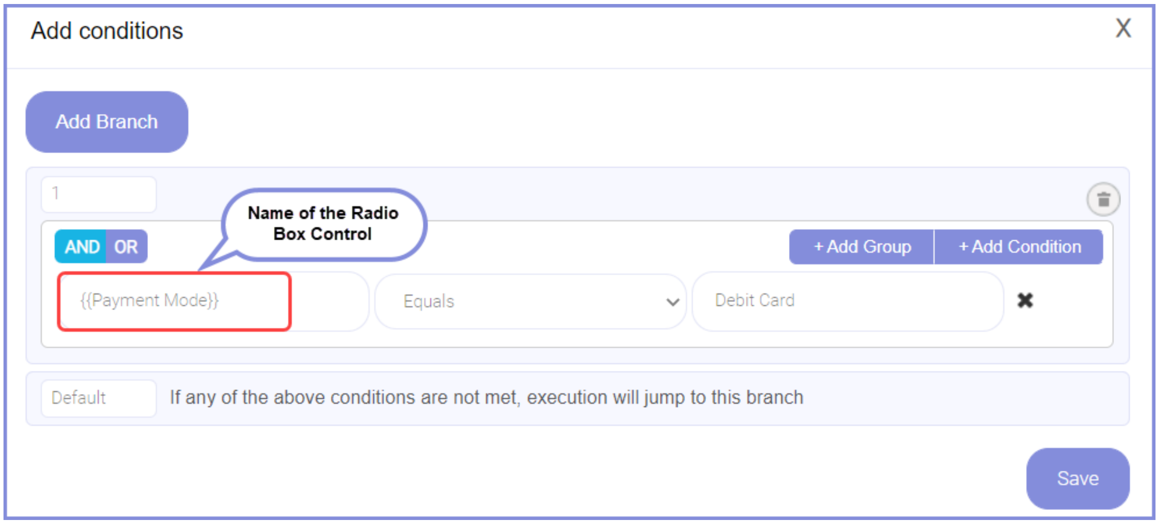
First, create a form called Payment Mode with radio buttons to provide Payment Mode options.



Then add the conditions to take different branches based on the field names given in the forms.

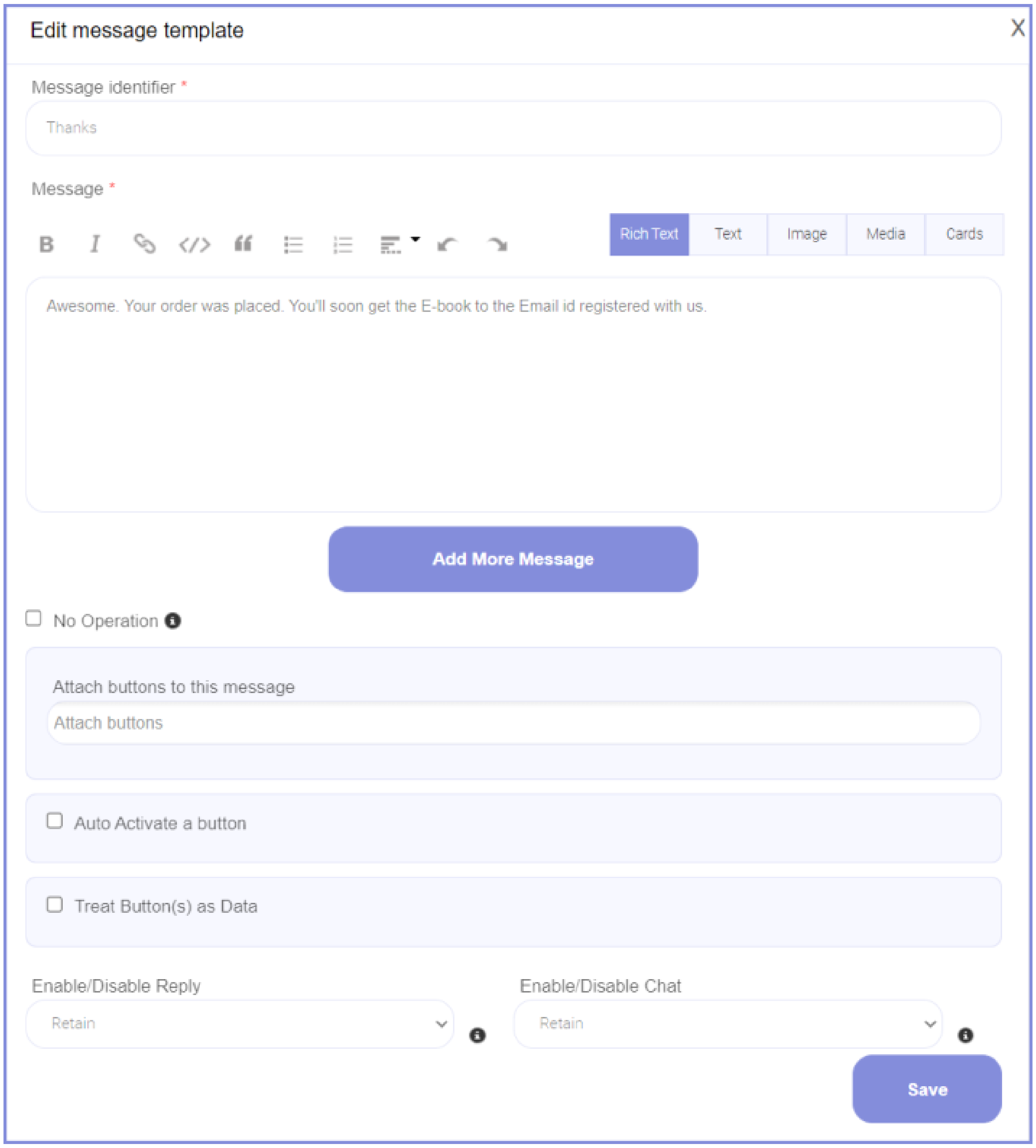
Info! While adding the conditions, give the name of the control within {{}}.

In this simple example, a condition is made to display two forms namely **Pay through Credit Card** and **Payment through Debit Card** based on the payment mode selected by the user.



When the user selects the **Debit Card** option, a form will be displayed to obtain the debit card details from the customer. By default, if the **Payment Mode** is not equal to **Debit Card**, the execution will be jumped to the **Credit Card** Branch.

Template to say **Thank you** after receiving the payment from the customers is shown below:



Next guide **API Node** illustrates the steps to consume **Twixor Compute** or Custom **REST APIs** in your application.

API Node

In most of the applications or services we use today, API takes the main responsibility that makes two applications to intercommunicate among themselves.

In Twixor EnCaps, there is a provision of the **API node** that lets you use the third-party services in your application.

If you need to act upon information either using **Twixor Compute** (Appiyo) or **another system** and if that system provides **REST APIs** for that particular event, you can consume the third party REST APIs within Twixor EnCaps by employing the **API Node**.

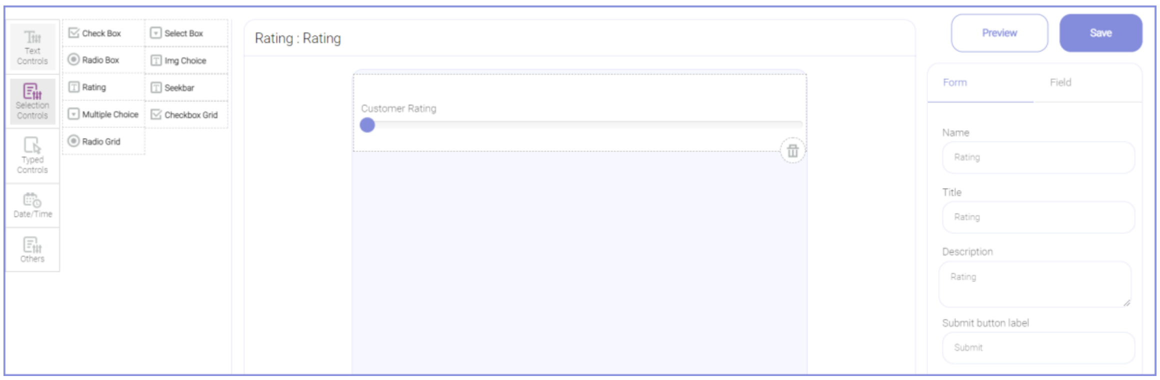
Using Twixor Compute

When you want to perform any computations in your campaigns using Twixor EnCaps, like performing calculations based on the value given by the customers in EnCap forms, you can call the Twixor Compute engine (**Appiyo**) using **API Node**.

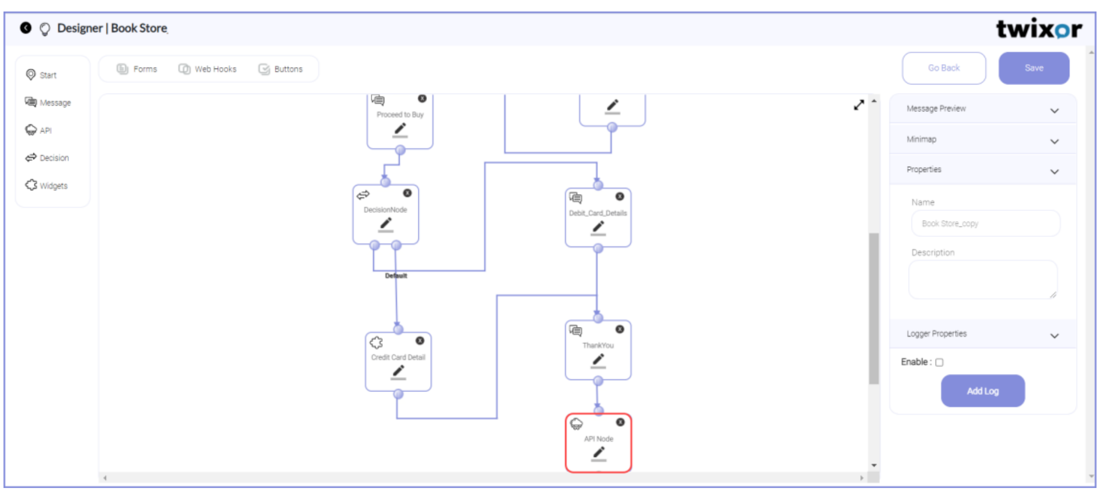
Let's use the **API Node** in the BookStore EnCap for fetching and displaying the details of the customer based on their feedback from the Twixor's BPM engine(i.e. from **Appiyo**).

For this, let us create and use the button **Get Feedback** in **Thank You** message template to get the feedback from the customer.

Then **Rating** form can be used to get the customer's feedback using **Seekbar**.



Now place the **API Node** after the **Thank You** message template as shown below:



Click  in the API node to configure the properties of the API node.

1. Give a name for the API node in **Node Name**. This name will be used to fetch the result variable from **Appiyo**.

2. Select the **type** of **API**. Choose **Twixor Compute** API if you want to use the Appiyo data source.

3. Choose the **Appiyo data source** option.

For this example, let's use the web hook configuration (Connected to Appiyo) called **API Node** to connect to the Appiyo Data source. To create and configure web hook configurations, refer **Webhook Configuration** guide.

4. Select the **Project** created in **Appiyo** and select the process associated with it.

Creating Process in Appiyo

To create a process in Appiyo for fetching the feedback from the customers, follow the steps below.

1. Go to **Appiyo.com**.

2. Select your **Zone** and choose your **Project** or **Process Repository**. In this example, a process repository called **Process Store** is selected.

Refer **Create Process Repository** section of the **Appiyo User Guide** to get a detailed view on creating a new process repository.

3. Then select the required process modules from the list. For this example, select a module called **User Actions**.

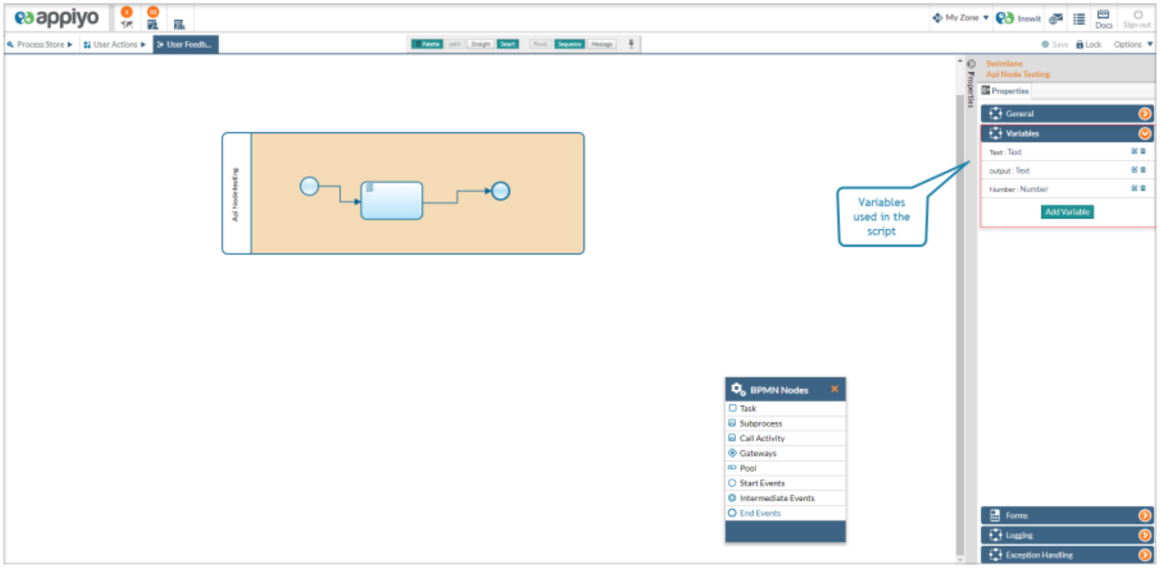
Follow the steps illustrated in **Modules** topic of the **Appiyo User Guide** to get an assistance on creating Appiyo work flow modules.

4. After the selection of the module, the workflow(s) associated with the project will be rendered in a list.

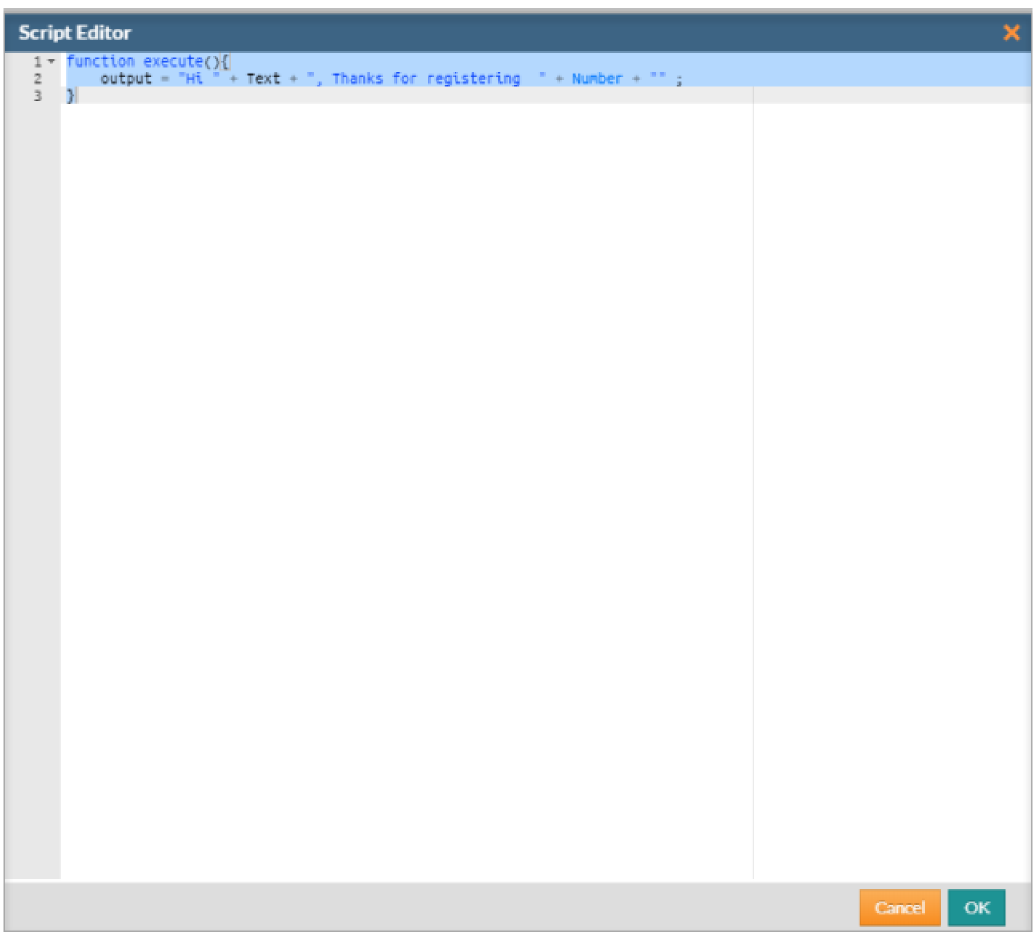
Create Workflow section will give you a clear idea on creating a new work flow.

Create and select the **User Feedback** work flow and create a pool or process called **Api Node Testing**.

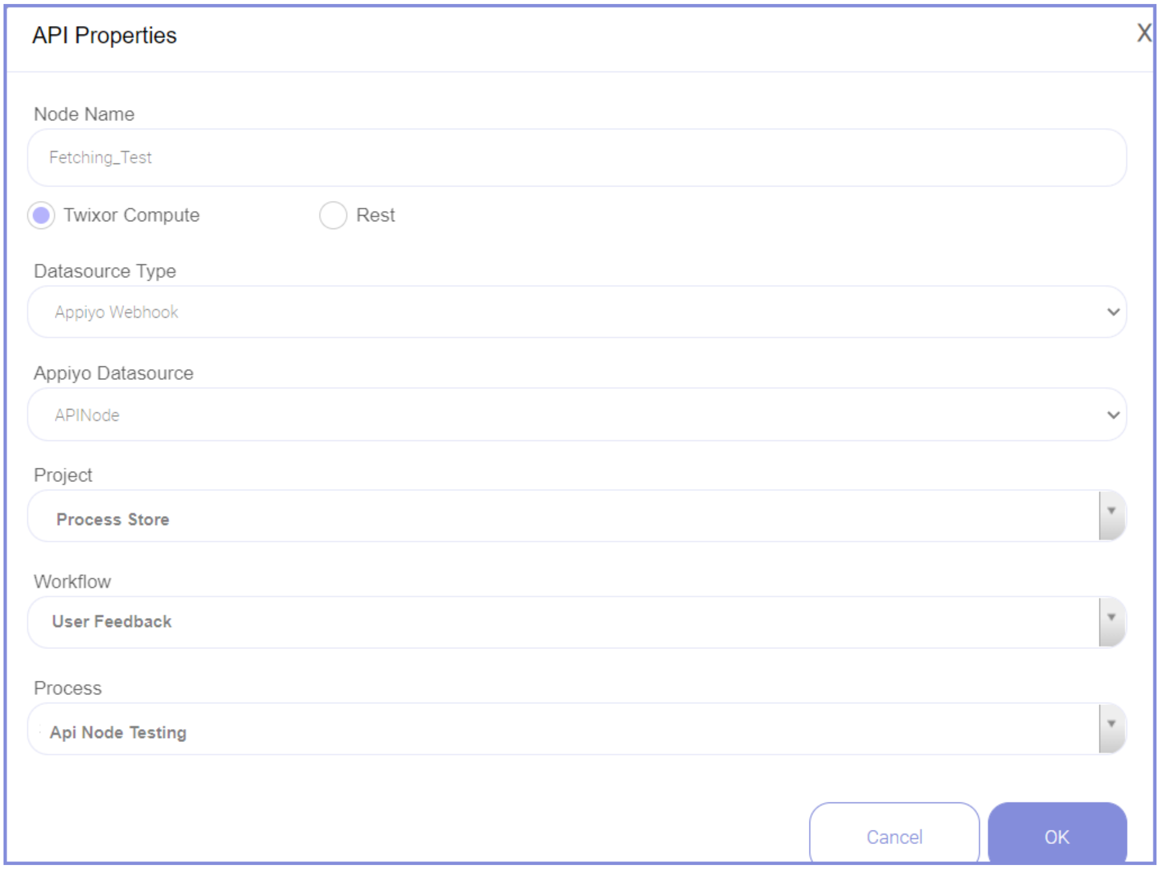
Select **Task** from BPMN Nodes palette and choose Script task option. And then write the script to get the feedback from the customer using Twixor EnCaps.



Let's write a simple script for fetching and displaying the name and phone number of the customers who are giving the feedback through EnCap Forms. Input variables should be same as the field name of the EnCap form controls through which the input is received.

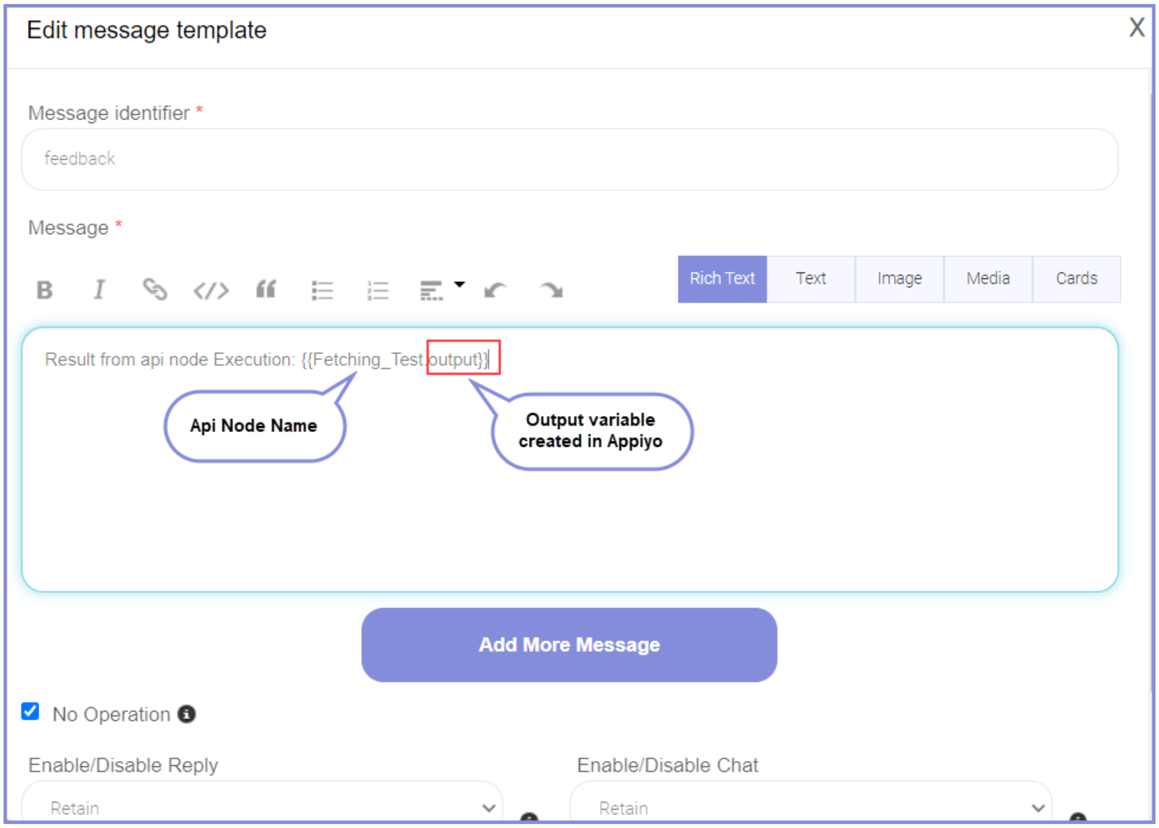


5. After creating the process in Appiyo, go to **Twixor EnCaps** application and choose the associated **Process** and **Workflow** created for the Appiyo **Project** or Process Repository in the **API Node Properties**.

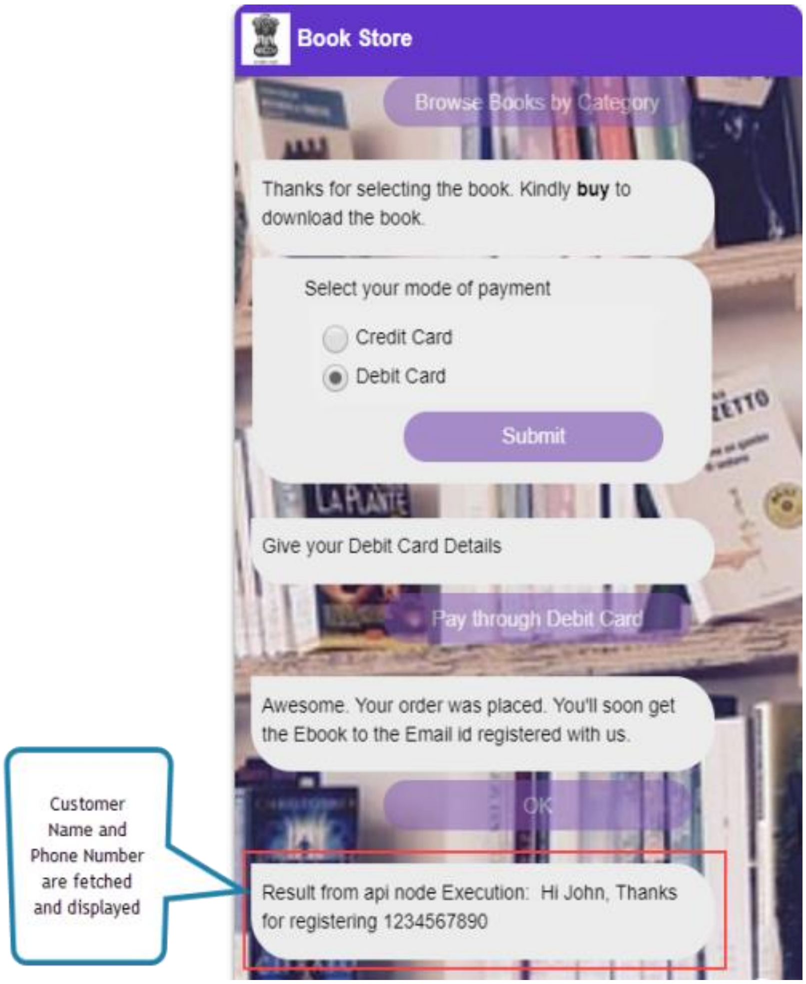


6. In order to display the executed result, create a message template called **Feedback**. The computation **output** can be retrieved by giving the API node name and output variable scripted in Appiyo in the following format:

{{API node name. output variable}}



After launching the Book Store EnCaps by following the steps depicted in the **Launch Configuration**, the result obtained from the API node is given below:



In the output shown above, the result statement is fetched and displayed from the **output** variable defined in Appiyo.

To know more about Appiyo **Zones** and **BPMN Nodes**, please refer **Appiyo user guide**.

Refer **Consume Rest APIs** guide to consume third-party Rest APIs from your application.

Consume Rest APIs

For some applications, it is required to consume third-party REST APIs to retrieve certain data, get the response, and transfer that API response to the end user interface.

Sometimes, you don't want to expose all the API data and you need only certain fields of the API response.

Here we'll show you the steps to either transform the whole API response or certain fields of the API response to the resource in your application easily using Twixor EnCaps.

1. Select **Rest** to consume third-party Rest API in your application.

2. Next, select the **HTTP method** from the list of available HTTP Verbs(**GET**, **POST**, **PUT**, and **DELETE**).

An **API request** allows you to contact with a server in order to do some action. These actions are termed as **HTTP methods**.

GET	Method used to retrieve the data. It doesn't impose any other effect on that particular data.
POST	Send away the data to the server by means of HTML forms.
PUT	Replace an existing resource or data in the server
DELETE	Delete the data from the target resource specified by the request URI

3. **Enter** the **Request URI** in the input field provided. **Request URI** refers the resource upon which the HTTP request is applied.

4. **HTTP header** fields are used to give the information regarding the **HTTP Request** or **Response**, or about the data sent in the message body.

Click the **Header** tab to provide the appropriate header fields for the API request. This will open a key-value editor. Give the **Key** and **Value** for the header manually in this editor.

Generally, there are four types of **HTTP Headers**.

> **General Header:** This header can be used for describing both the request and response messages. Examples are Cache-Control, Transfer-Encoding, Trailer, Upgrade, etc.

Server Response-Header: This header is applicable to response messages alone. Age, Location, Etag, Set-Cookie are some examples of Server Response-Header.

Client Request-Header: Header fields like Accept, Accept-CharSet, Authorization, Cookie, etc. are for defining request messages.

Entity-Header: These headers describe the meta-data about the object's body or the resource denoted by the HTTP Request. Some frequently used entity headers are Content-Type, Content-Length, Content-Location, Content-Range, etc.

Provide the header based on the body of the HTTP request.

> **Info!** For **x-www-form-urlencoded** body type, Twixor EnCaps voluntarily binds the suitable **Content-Type** header so that you don't want to set it manually. The Raw header is set automatically as soon as you provide the data format, for example, JSON.

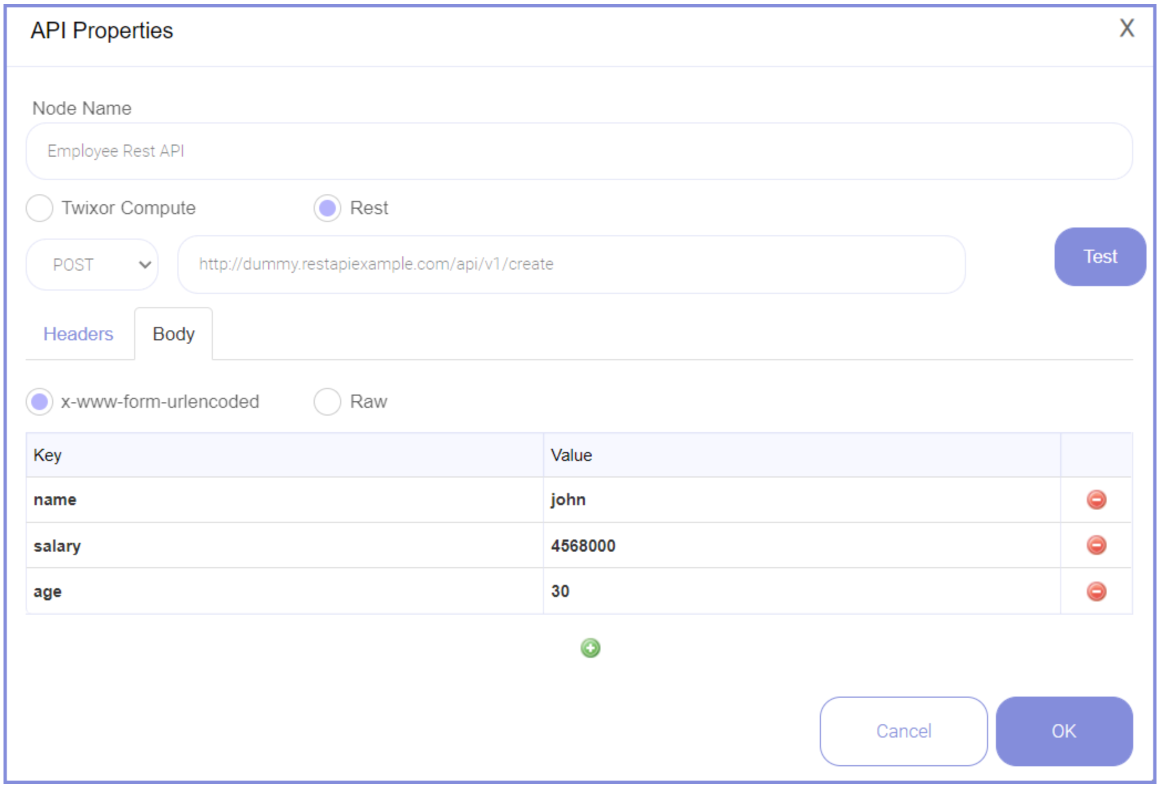
HTTP Body Data

x-www-form-urlencoded

Select the body **Content Type** (**x-www-form-urlencoded** or **Raw**) while sending the form data as a **POST Request**.

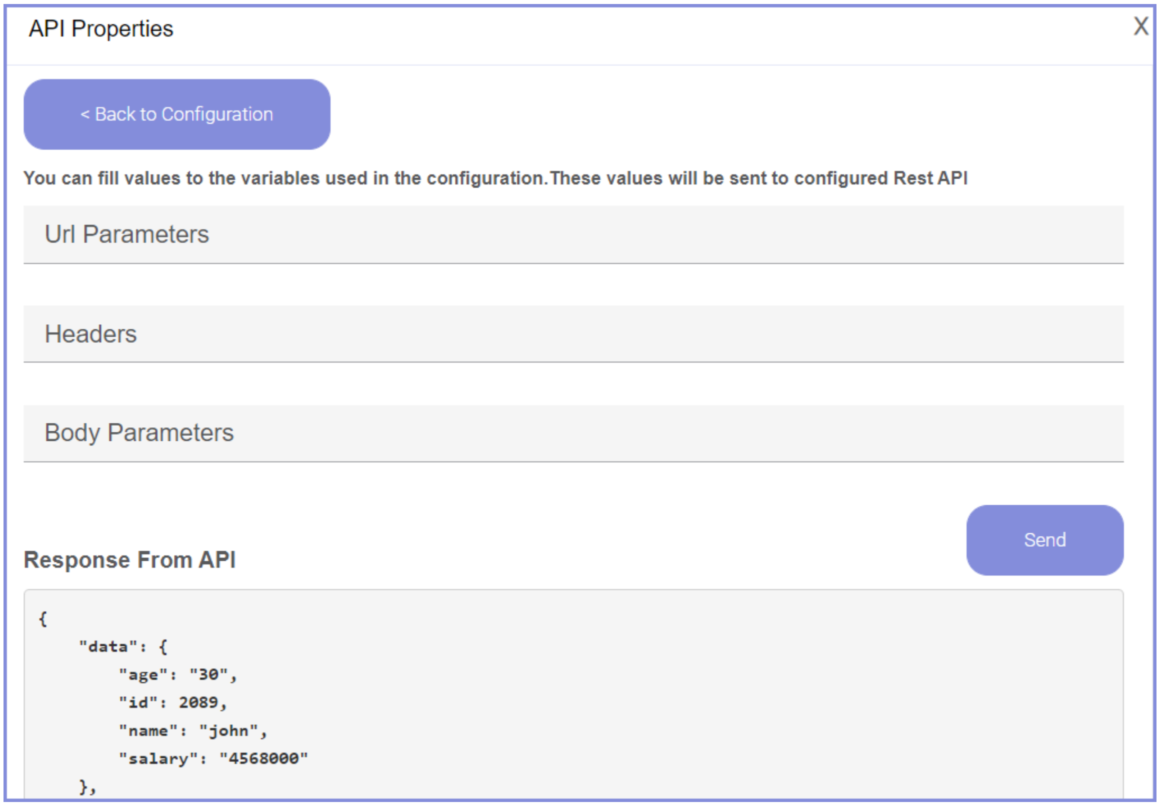
Use **x-form-www-urlencoded** type if you want to provide simple text or ASCII information. You have to just type the list of keys and values in the key-value editor. Twixor EnCaps will cipher it the right way.

Here let's use a dummy REST API as an example to provide **form-urlencoded** data to create an employee.



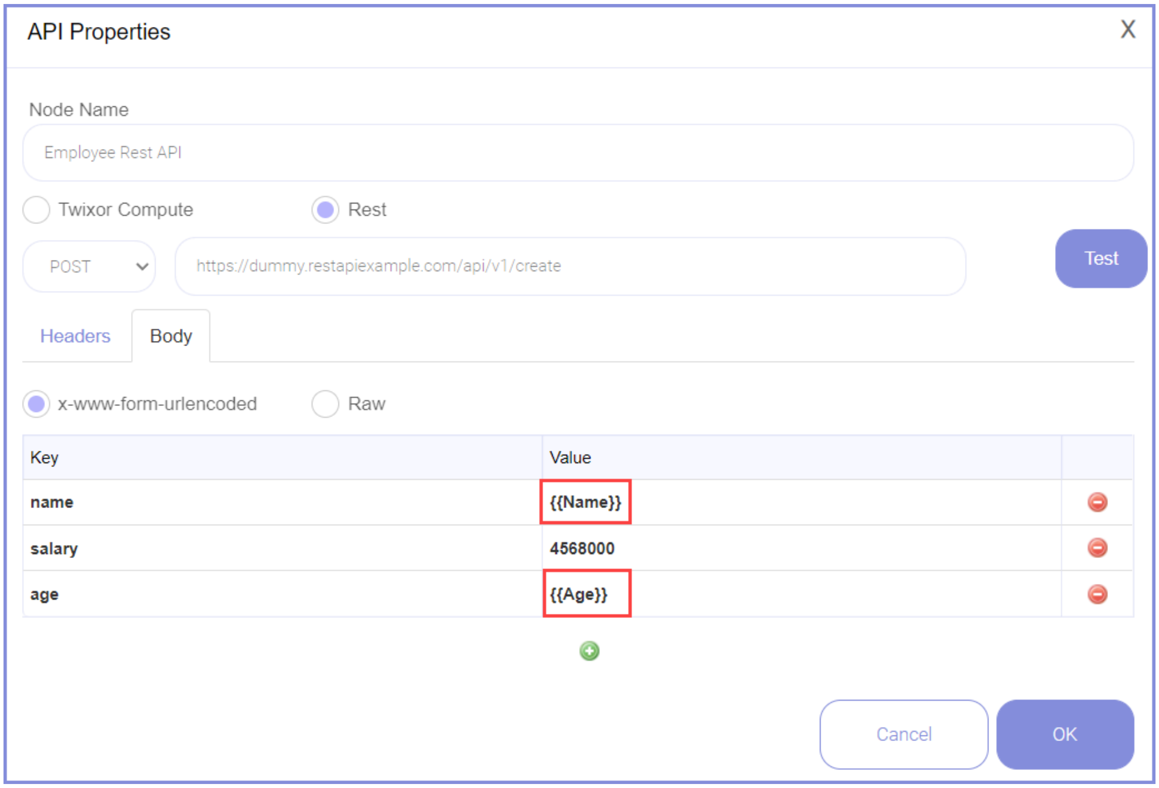
- Use the **POST** method and give the request URL.
- Select the **x-www-form-urlencoded** option to send **plain text data** to the Restful API server.
- Then, give the employee details (**name, salary, age**) in the **Key-Value editor**.
- Click **Test** to view the API response for this request.

Below shown is the **API response** for this POST request. An employee data is created and a unique employee id is returned in the response.

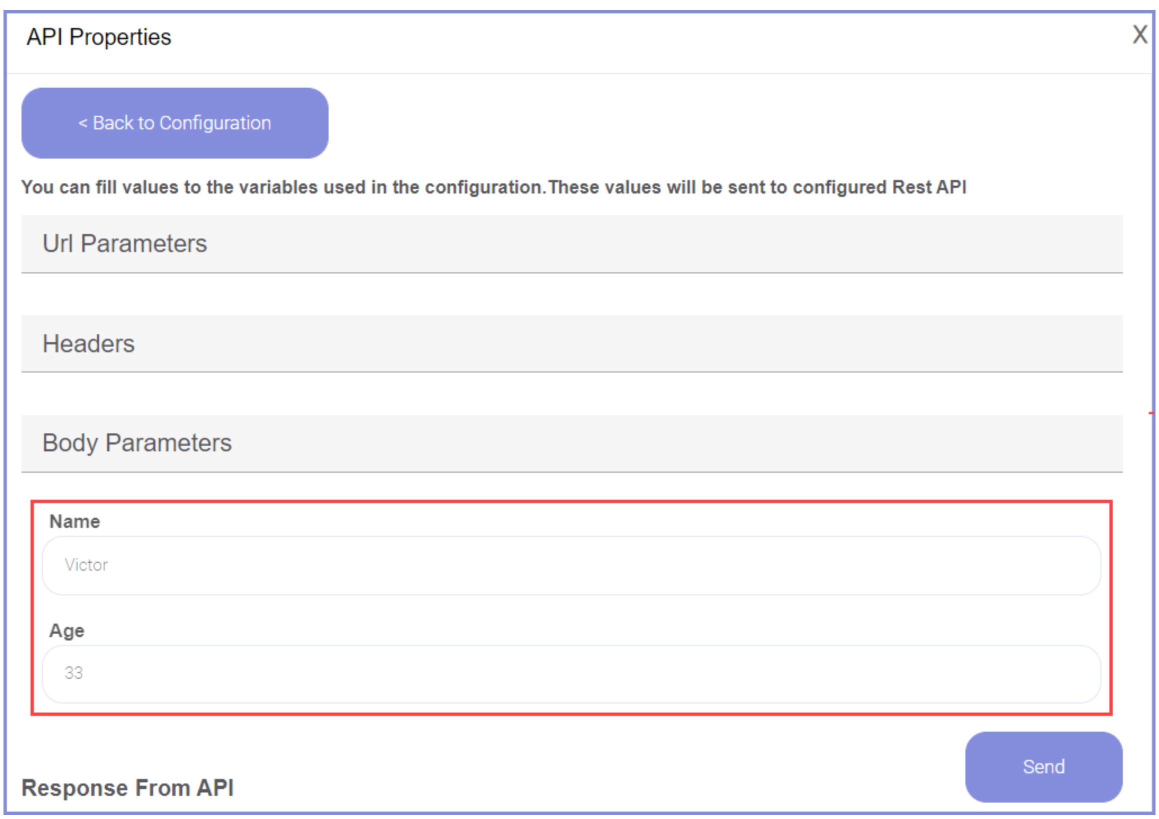


Here you also have the option to fill the values to the **URL Parameters**, **Headers**, and **Body Parameters** used in this request.

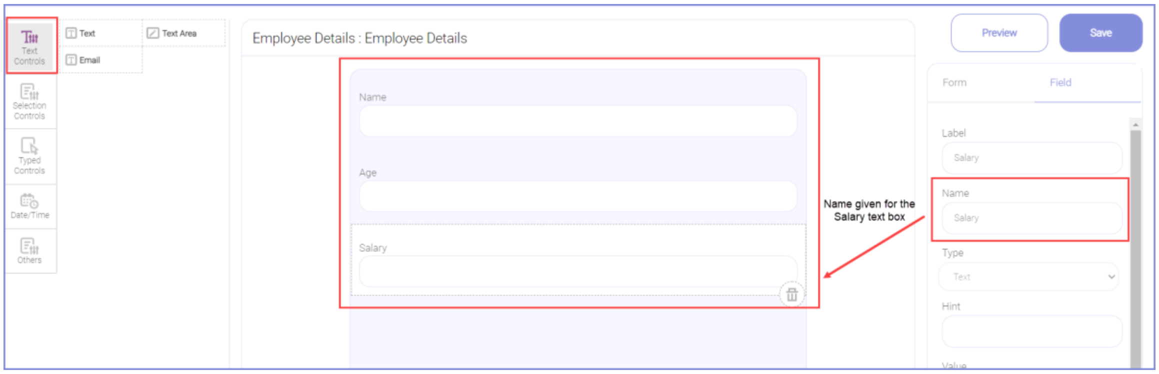
- To fill the values, enter the custom **Variable Name** within double curly braces in the key-value editor as shown below.



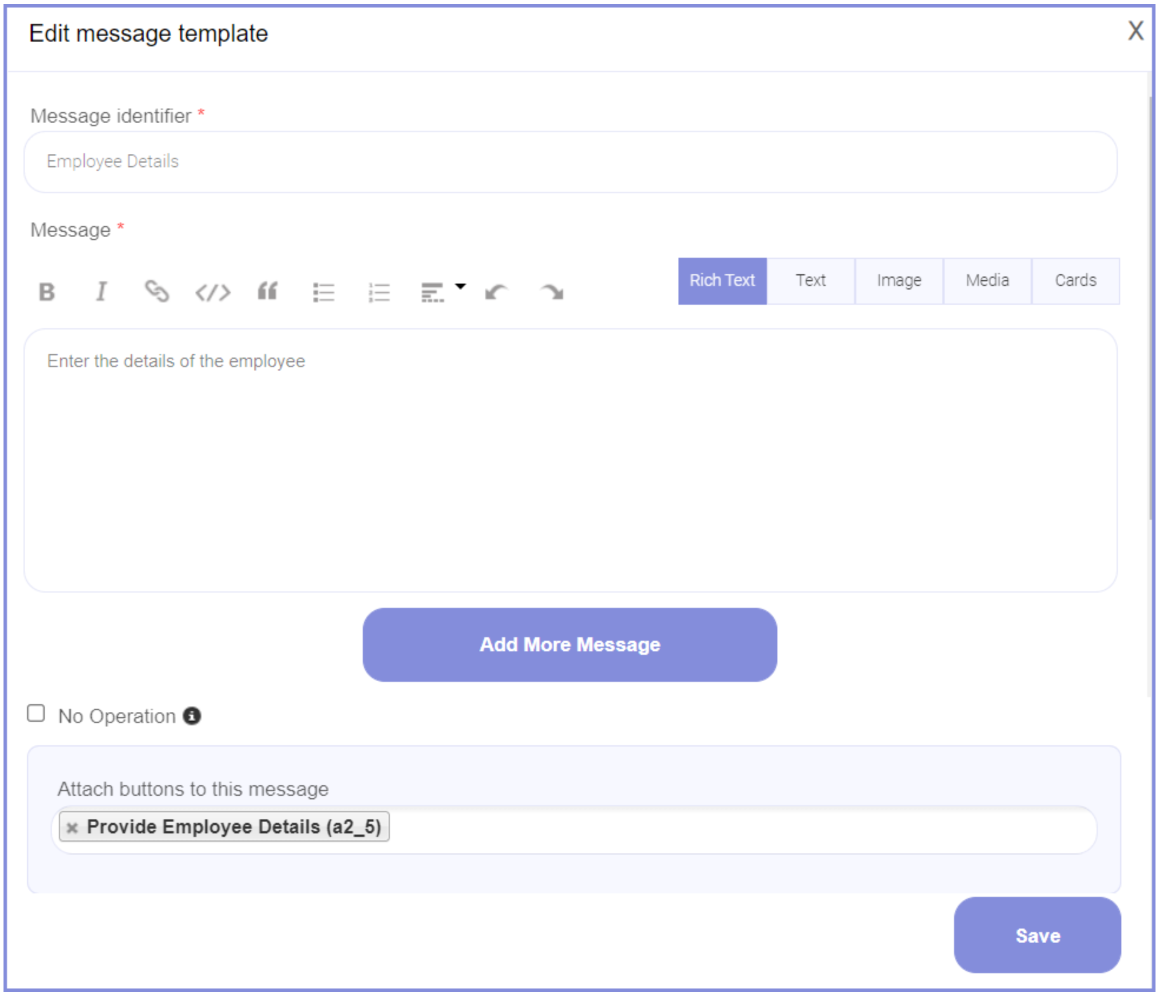
- Click **Test** to dynamically fill the values.



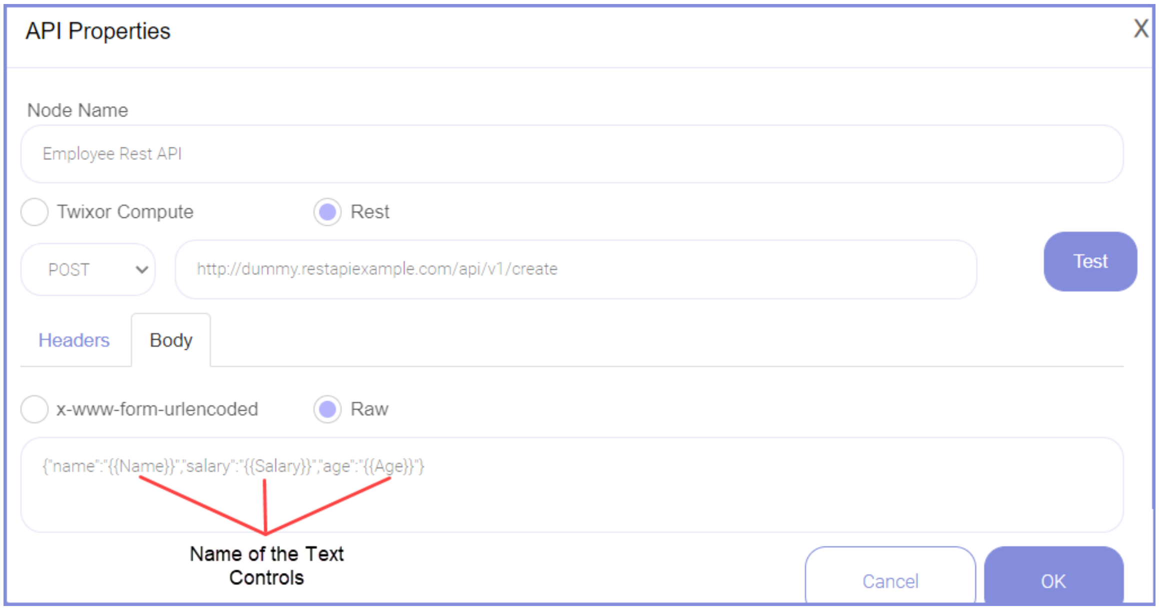
- Then hit **Send** to send these values to the configured Rest API.
- You may also send away these values from EnCap Forms to the organized Rest API. To do this, create a form **Employee Details** with three text controls to get the name, age, and salary details of an employee.



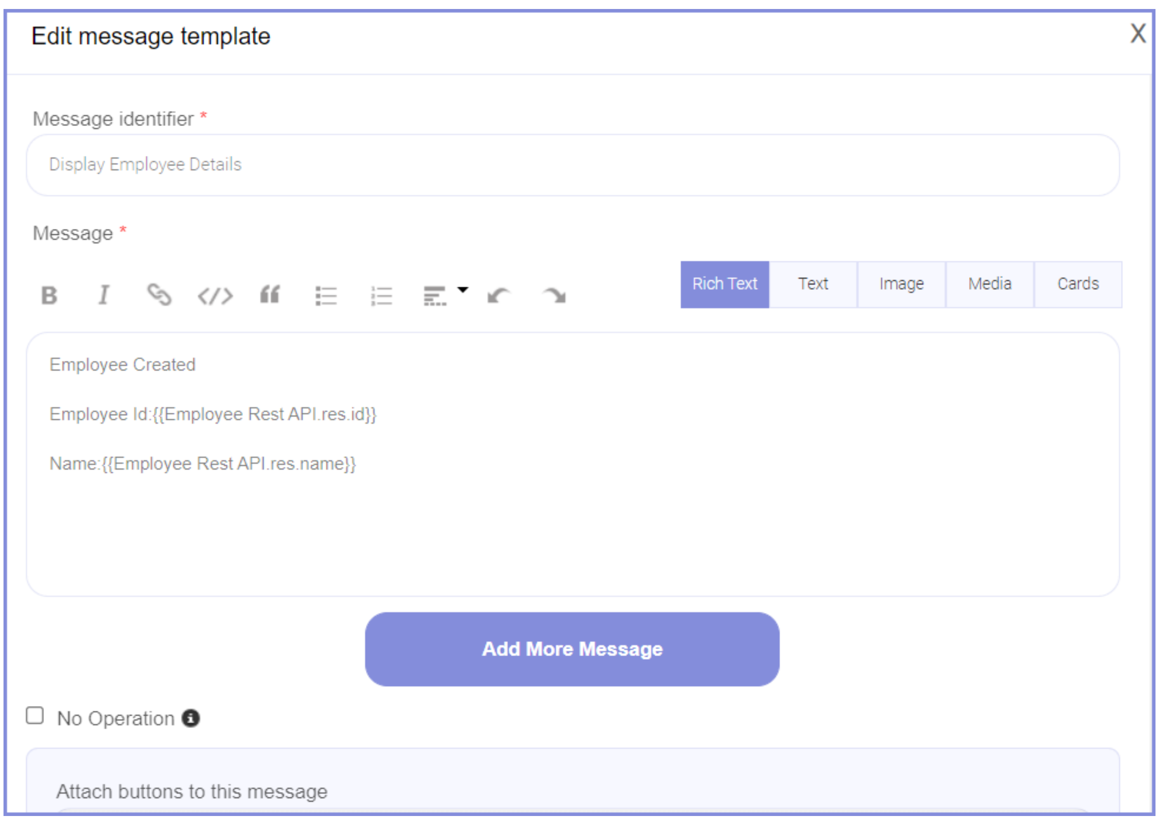
- Then create a new button namely **Provide Employee Details** of form button type to call the Employee Details form made by us.
- After creating the form and button, draft and place the message template before the API Node. And, don't forget to use the **Provide Employee Details** buttons in the message template to call the Employee Details form.



- Refer the Name of the text controls within double curly brackets while passing the body parameters for the Rest API as given below. For example, the name given for the Salary text box is Salary.

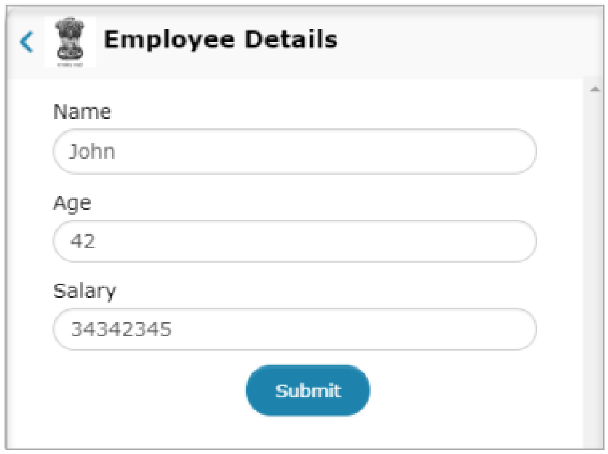


- We can then fetch and display the employee data created using the values given in the EnCap forms by employing another message template. Note that this message template will be placed next to the API node.

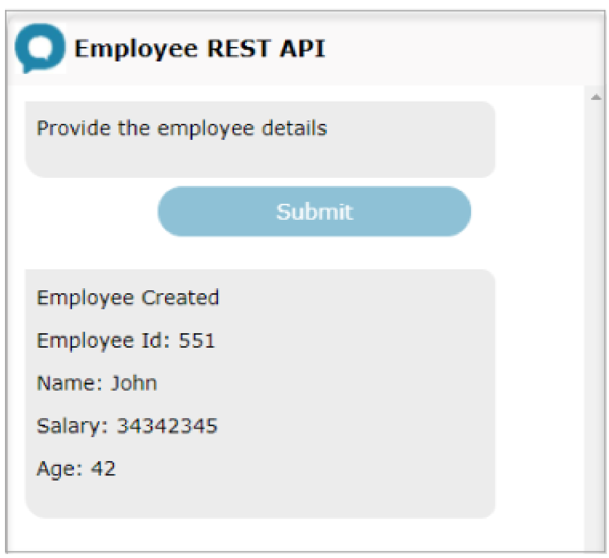


- In the message template shown above, use the format illustrated in **Fetching and Displaying the fields of API Response** section to retrieve and present the employee data.

Give the employee data in the EnCap Form as shown below:



This employee data will be created and stored in the configured REST API server as shown below.

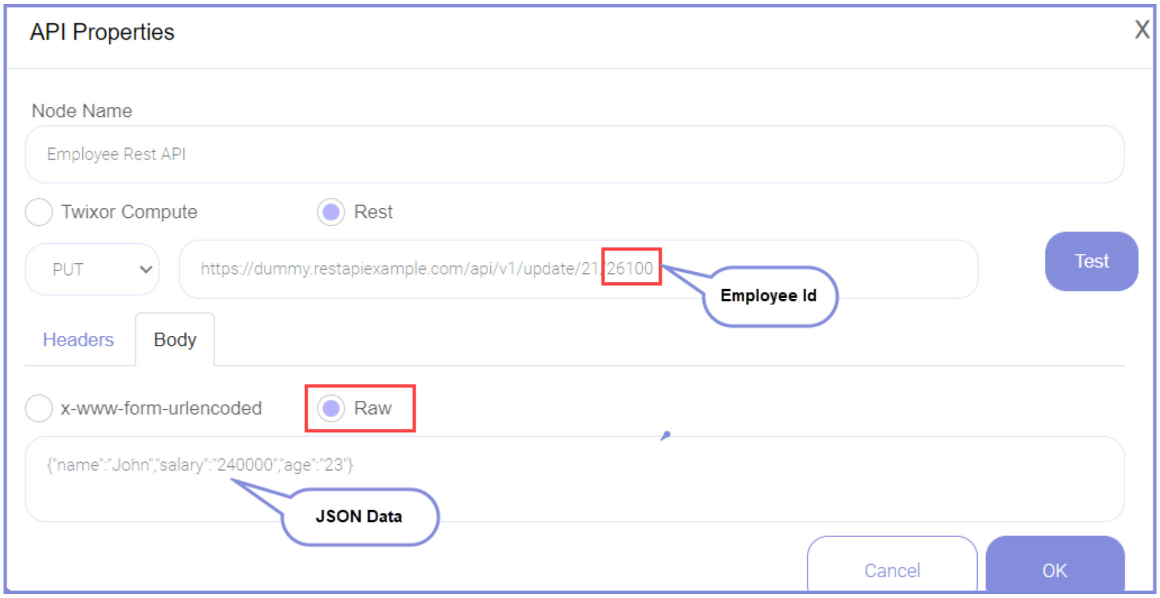


Raw

The **Raw** input contains almost any type of data like **Plain Text**, **JSON**, **Javascript**, **XML**, and **HTML**.

Let's update the details of an employee created by us using **PUT** method (By giving **raw JSON** input).

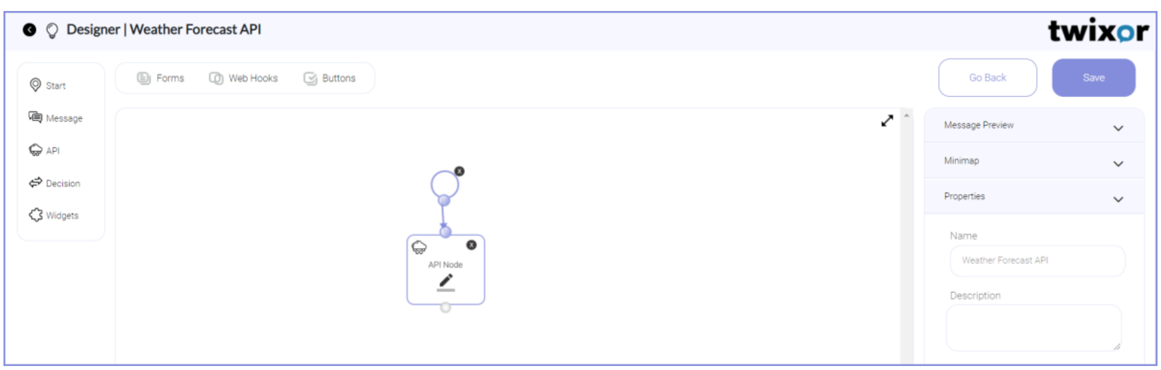
- Select **PUT** method and enter the **Request URL**.
- Give the **Raw** JSON data in the input editor to update the details of the employee.



REST API Request and Response Example:

Rest API Request:

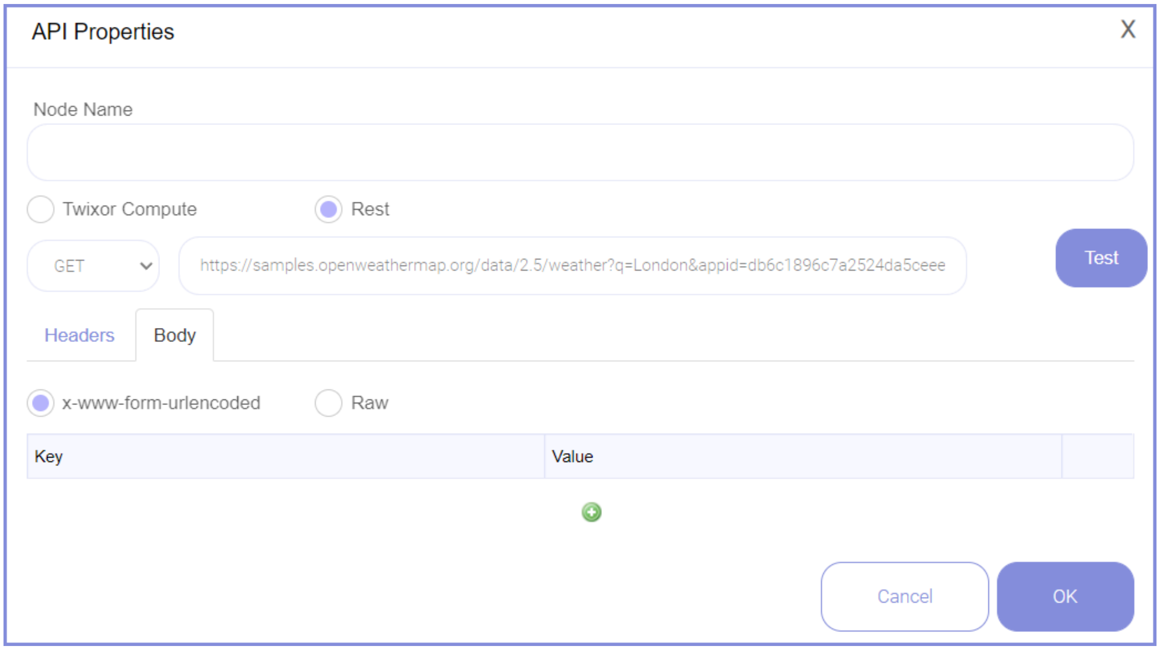
For illustration, let us make a call to a Weather API to fetch and display the weather forecast from API Response. For this purpose, create an EnCap called **Weather Forecast API**. Then drag and drop an **API Node** from the palette in **EnCap Designer**.



Then, configure the Rest API properties as given below:

- Give a name for the API node in **Node Name**. Let's give the API Node name as REST API.
- Select **Rest** option to access the Rest Resources.
- Select an **HTTP method** to perform the desired action on an acknowledged resource. In this example, choose the **Get** Method to retrieve the weather data.

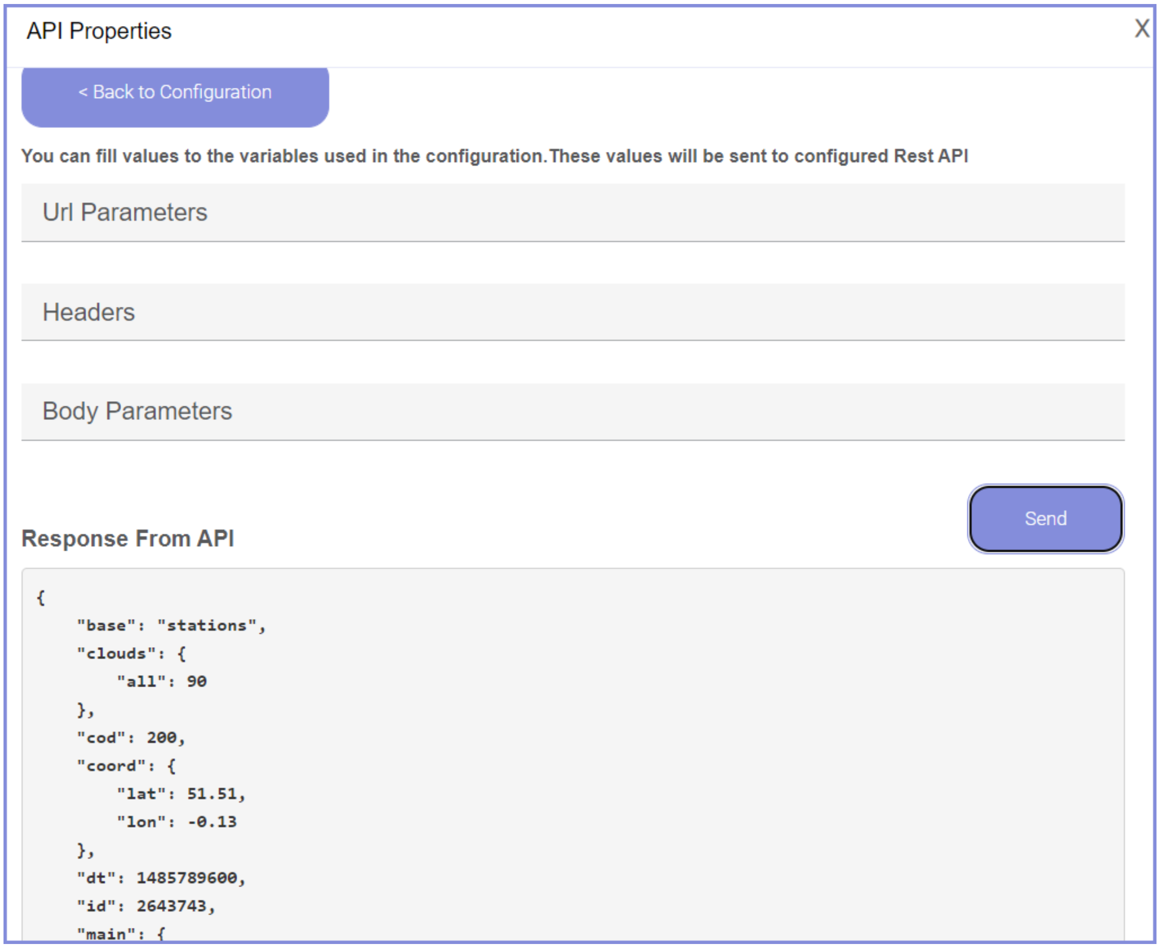
- Type the unique identifier of the resource **(URL)** upon which the request is applied. Here provide the URL for fetching the weather data from Weather API.



- Click **OK** to save the data.
- Click **Test** to test the rest API and view the response.

Rest API Response:

After hitting the **Test** button, you'll be able to view the **API response** for the request given.

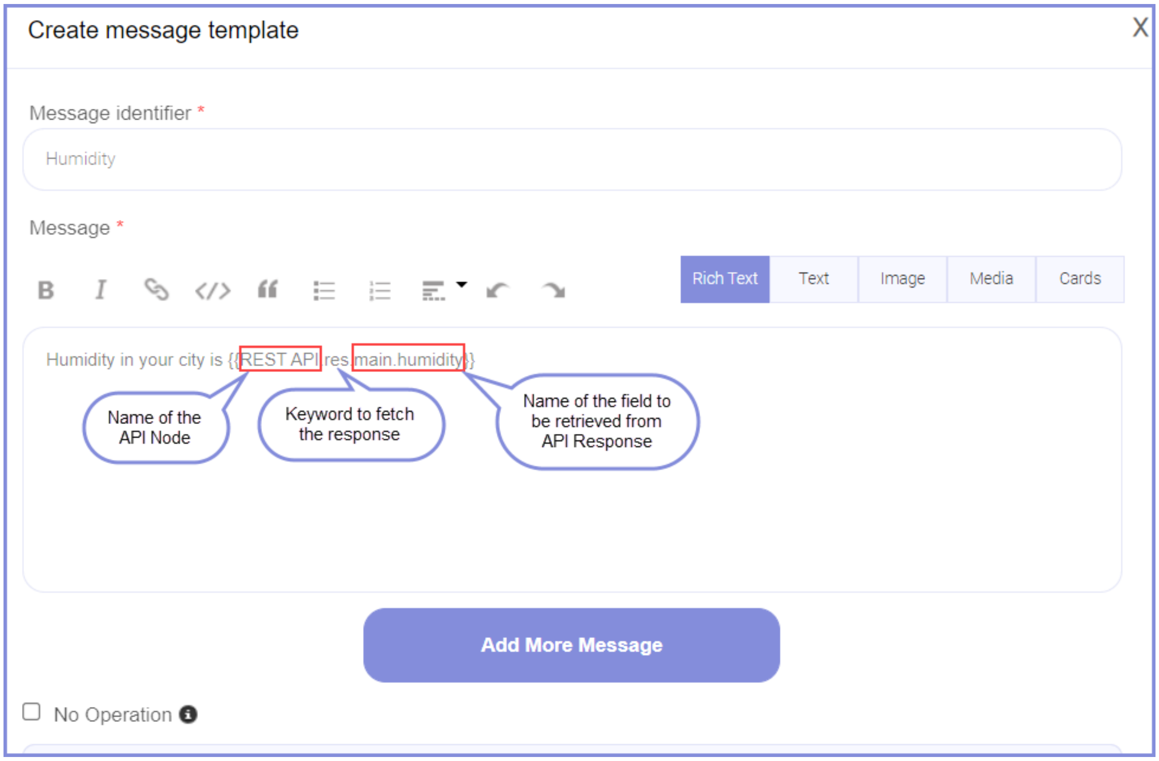


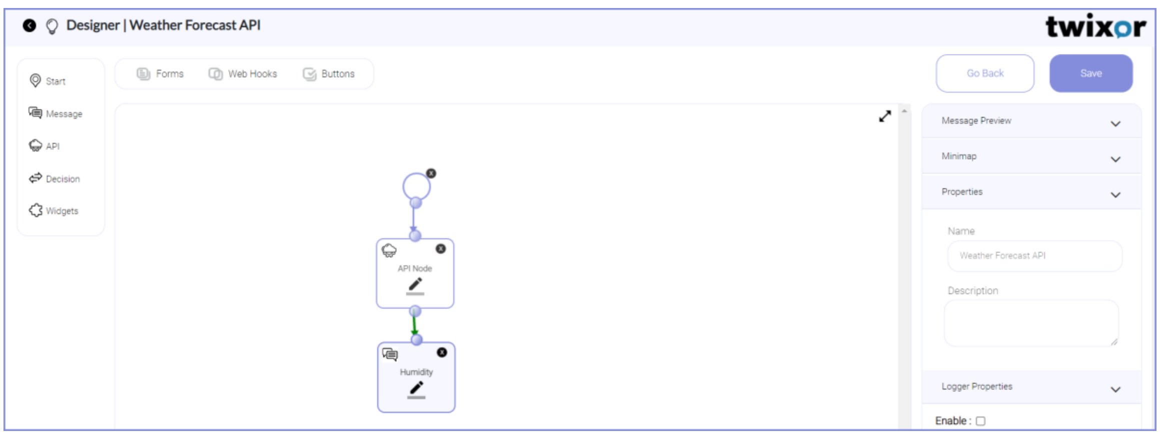
Fetching and Displaying the fields of API Response

You can display the data fetched from the API response in your EnCap message to the end user as shown below.

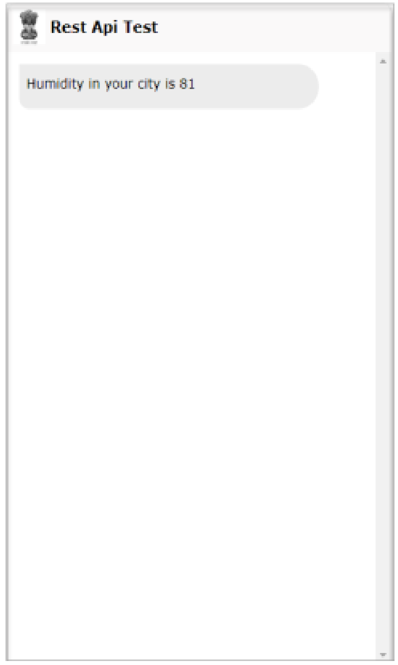
{**{API Node Name.res.Field Name to be fetched from the API response}}** is the tag for fetching the Response data from the Rest API server.

In this Weather API example, let's fetch and display the **humidity** data from the API response given above. For this, create a message template by dragging the **Message** node to display the humidity data.





Below shown is the **output** of the weather forecast API launch.


Rest Api Test
Humidity in your city is 81

Widgets

Widgets act as a miniature application that provides/gets the information to/from the user respectively. This user input can also be used in the subsequent steps of EnCap Workflow.

Typical widgets that you may use in Twixor EnCaps are **Geolocation**,**Cards**, and **Rich Cards**.

Geo Location Widget

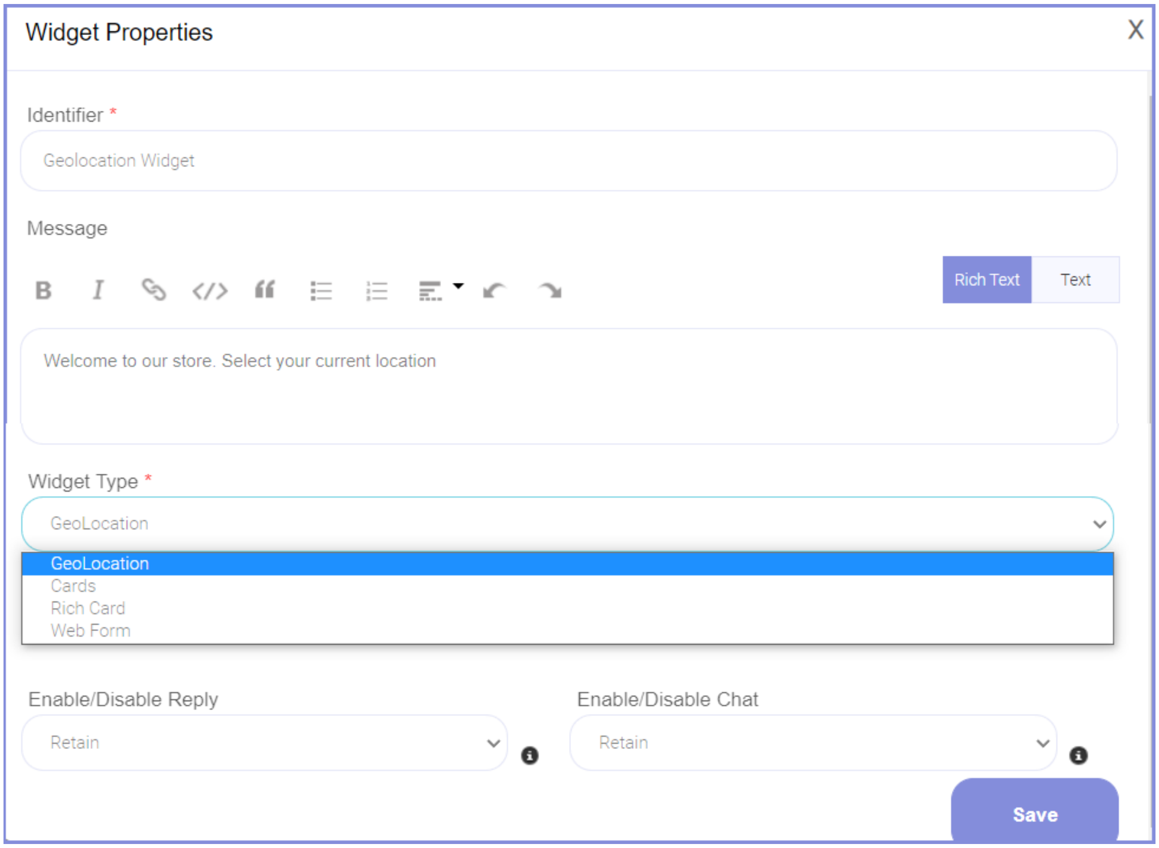
This widget is used to track the user's current geographical location on a map. This location information can then be used to

- Find the user's nearest physical location in order to enhance the user's experience.
- Shape the information according to their location. For example, you can suggest the exciting offers in the nearby stores based on their location.

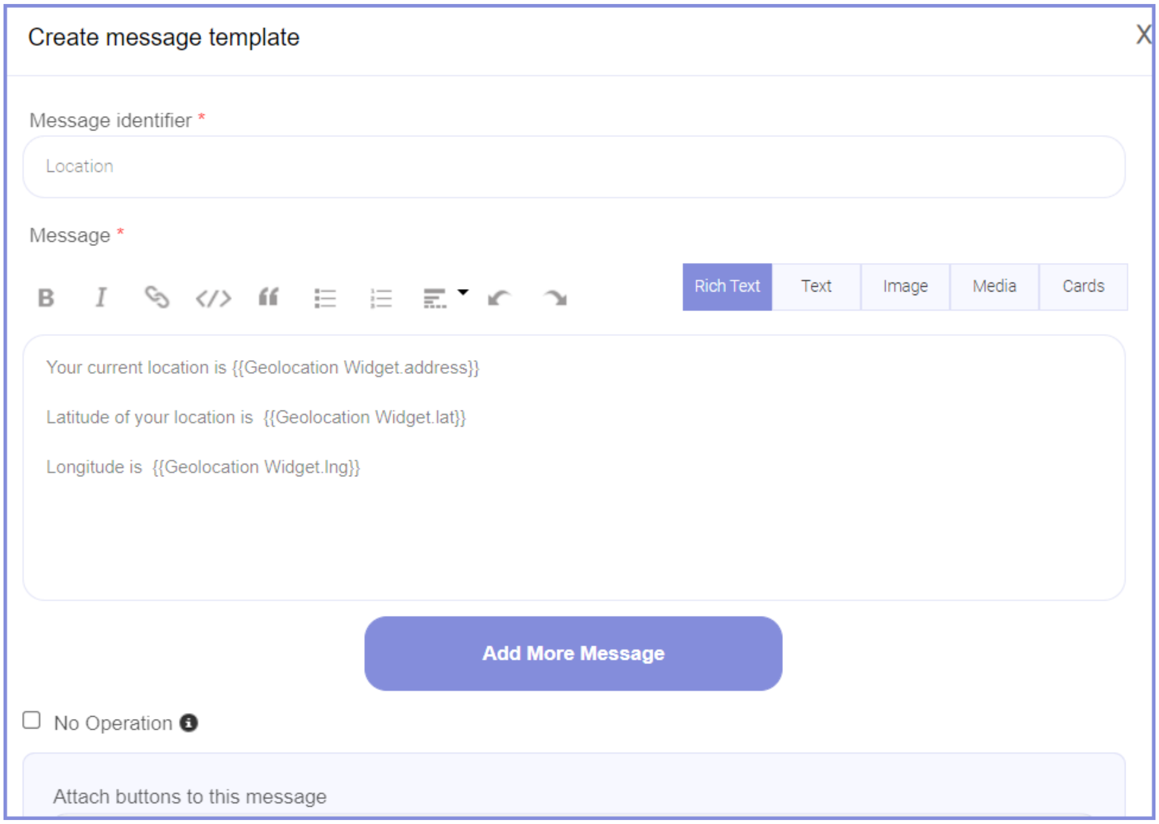
For example, let us create an EnCap called "**Geolocation Widget**" to explore about **Geolocation** widgets.

- Drag and Drop the **Widgets node** from the palette.

- Click  in **Widget** node to create a new Widget message.
- Configure the widget properties as given below:

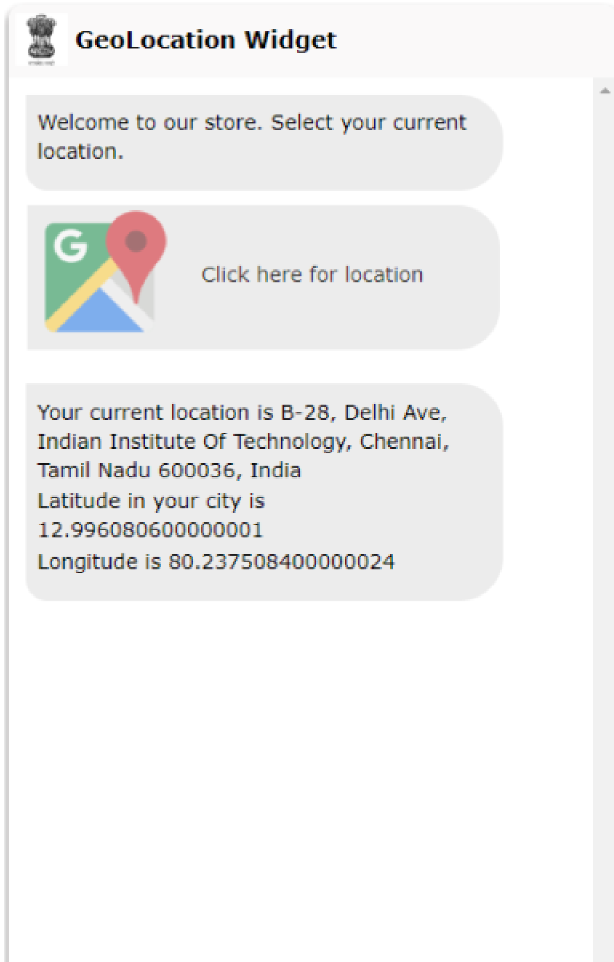


- Give a unique **Identifier** and enter the **Message** to ask the user to select their current location.
- Select the **Widget Type** as **GeoLocation** if you want to use location tracking (GeoLocation) widget.
- Click **Save** to save the created geolocation widget.
- You can also fetch and display the **address**, **latitude**, and **longitude** information of the user's current location in a message by creating a message template as shown below:



The default parameter to extract the **Address**, **latitude**, and **longitude** data is **address**, **lat**, **lng** respectively. For fetching the address, the **format** is **{{Geolocation widget id.address}}**. This format applies for both the latitude and longitude parameters.

Output:



Cards

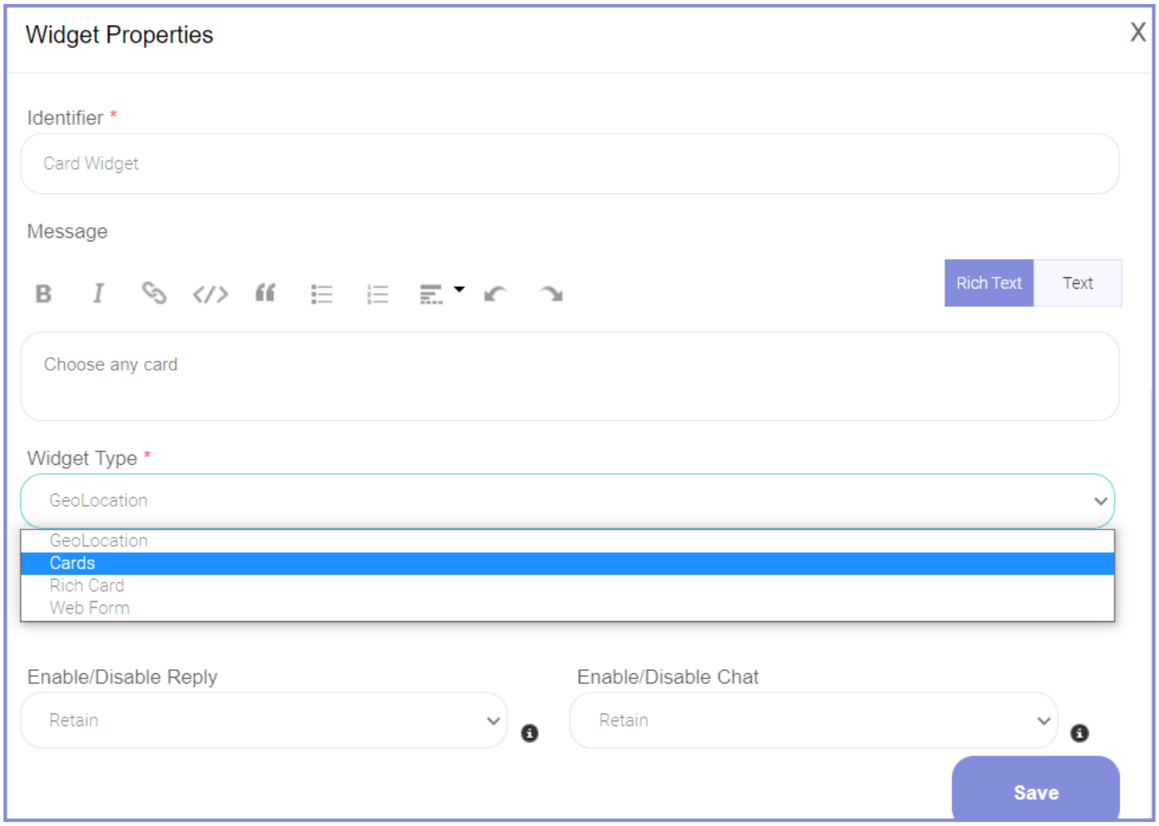
Want to use a wide range of content and responsive images in your EnCap? For this purpose, Twixor EnCaps offers you an elegant container called **Card Widget**. The Cards can be used to grant your customers with an exact set of information that guides them to their next best experience on your EnCap.

Based on the need of your target audience, you can engage your customers by designing the EnCap message with horizontally scrollable carousel.

To use **Cards widget** in your EnCap, follow these steps:

- Create an EnCap called **Cards Widget**.
- Begin the flow with the **Start** node.
- Then, drag and drop the **Widgets node** from the palette.

- Click  in **Widget** node to create a new message related to **Cards**.
- Configure the **Card Widget Properties** as given below:
- Enter an **Identifier** and type the **Message** to describe the card.
- Select the **Widget Type** as **Cards**.



The cards may contain multiple images and each Image can have **Image URL**, **Value**, **Description**, and **Footer**.

These parameters can be either static one or dynamically referred from a variable.

Configure Cards using Static Parameters

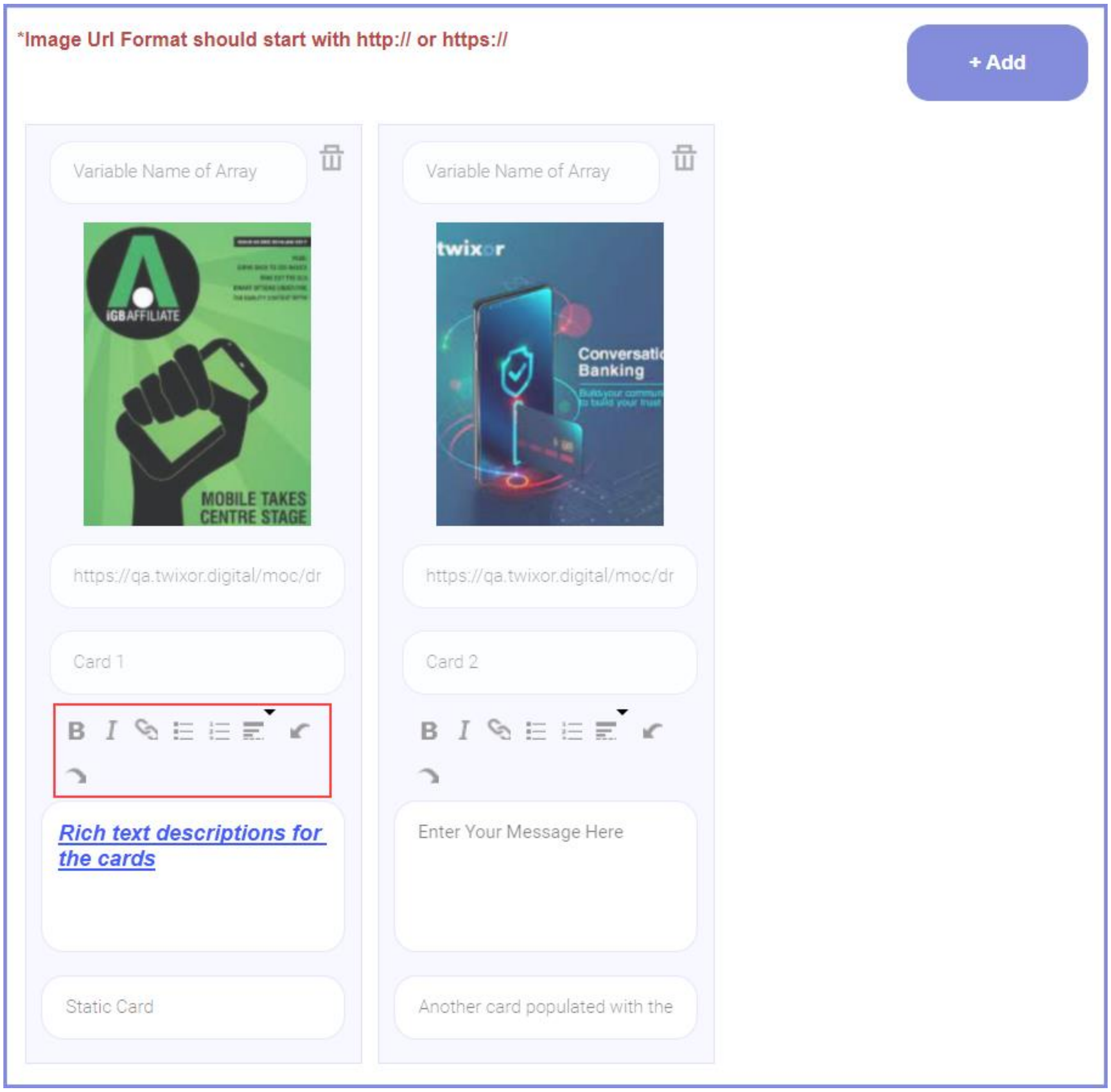
Let's create a card for an example by providing its parameters directly in the appropriate fields.

1. **Select** an **Url** for an **image** by clicking on the default image. After selecting an image, its URL will be automatically placed in the **Image Url** field.

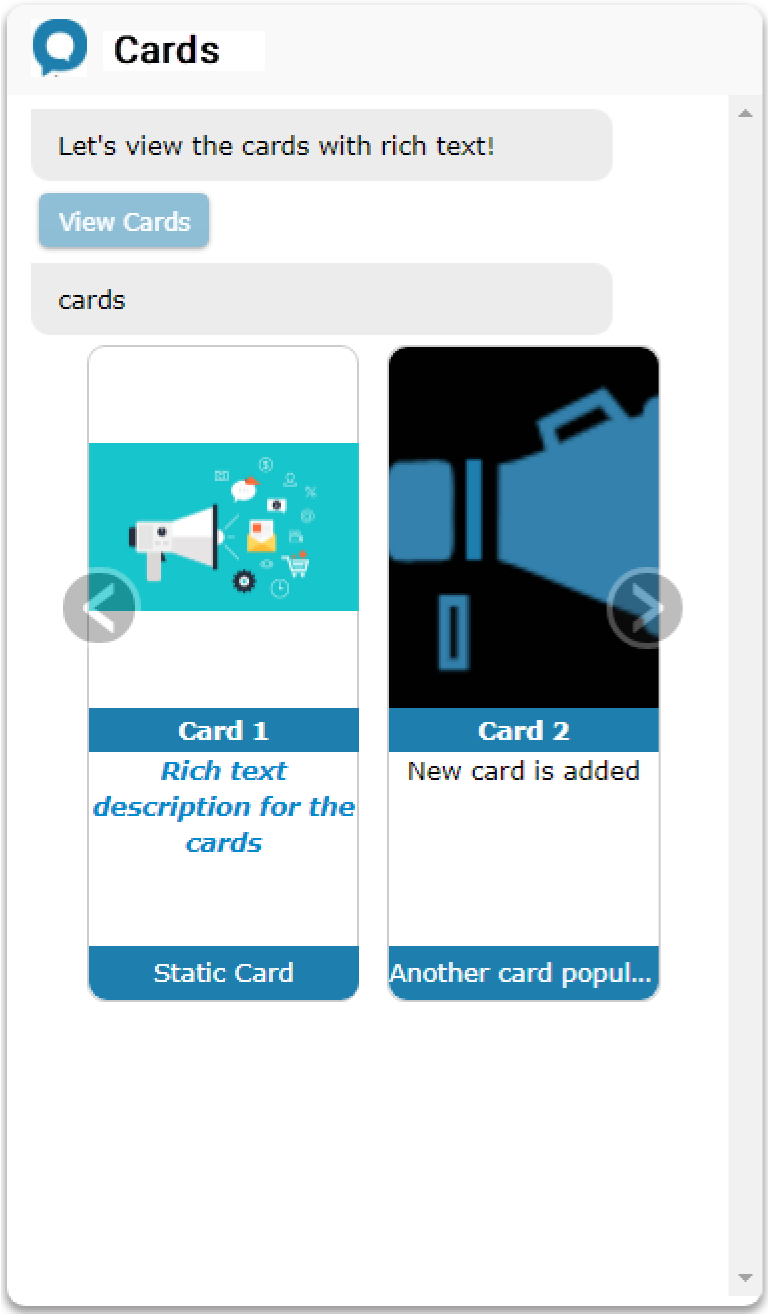
2. Enter the **Value** which is the short lead to the additional content in card.

3. Give a longer **Description** for the actionable images placed on the card.

4. You can also give the rich text description for the cards. Click **+Add** button to add a new card that will be displayed in the horizontally scrollable carousel as shown below:



Below shown are the cards with rich text formatting styles. In this example, we've applied the bold and Italic formatting and provided the hyperlink to the card description.



4. Then include an optional **footer** within the card.

Create Cards using Dynamic Variables from Appiyo

Let we also use the external variables defined in Appiyo in our card widget created in Twixor EnCaps. In order to refer the variables dynamically from Appiyo, first, define the variables in Appiyo. The card parameters like ImageUrl, Value, Description, and Footer can also be referred dynamically from an external variable.

Defining Variables in Appiyo

Steps given below shows you the way to define the variables in Appiyo.

1. Go to **Appiyo.com** and **Sign In** using your Appiyo credentials.

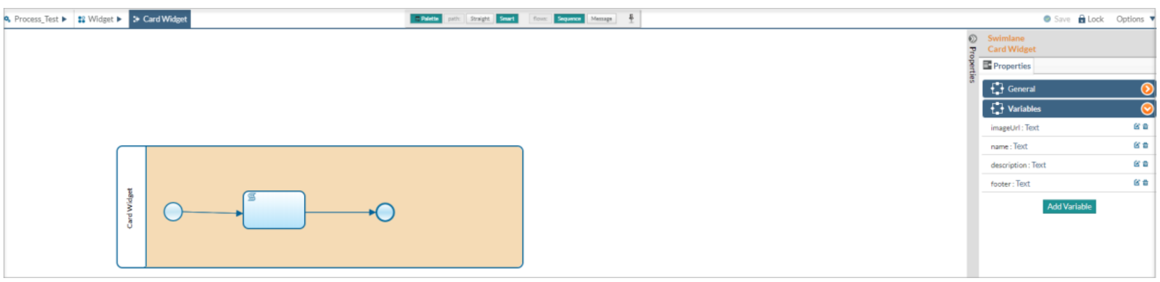
2. Create a pool called **Card Widget** under **Widget Workflow** in Appiyo by following the steps illustrated in the **Creating Process** section of **API Node** guide.

3. Then create and define the variables for using them in card widget.

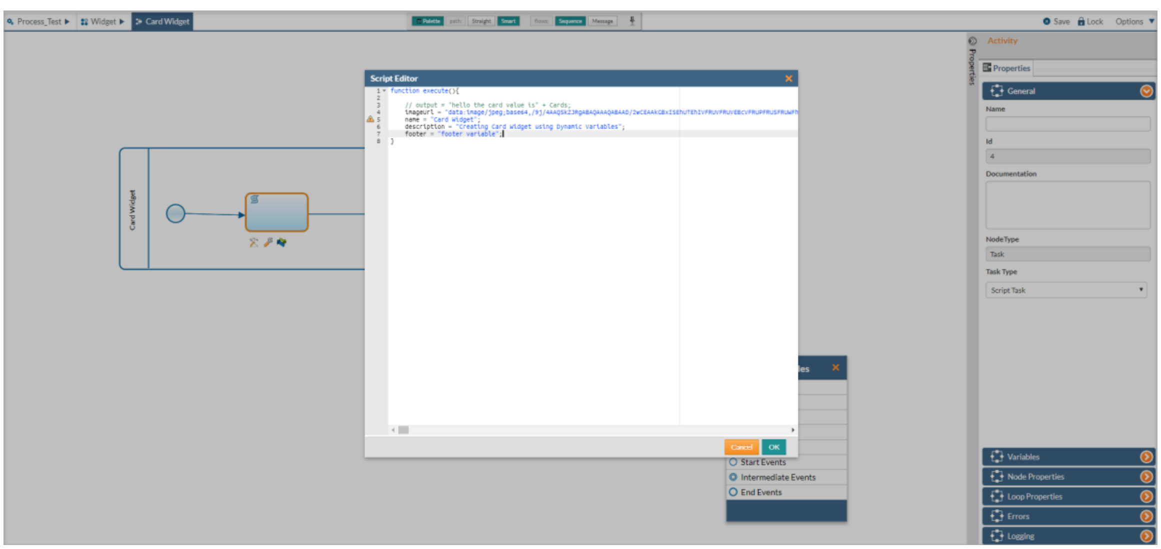
4. Select the **Card Widget** pool and click **Add Variable** to add the associated variable.

5. Add the variables for the Card parameters by using the steps described in the **Variables** section of the **Appiyo User Guide**.

The variables added in the Card Widget is given below.



6. Then write a script to give the values for these parameters as given below:

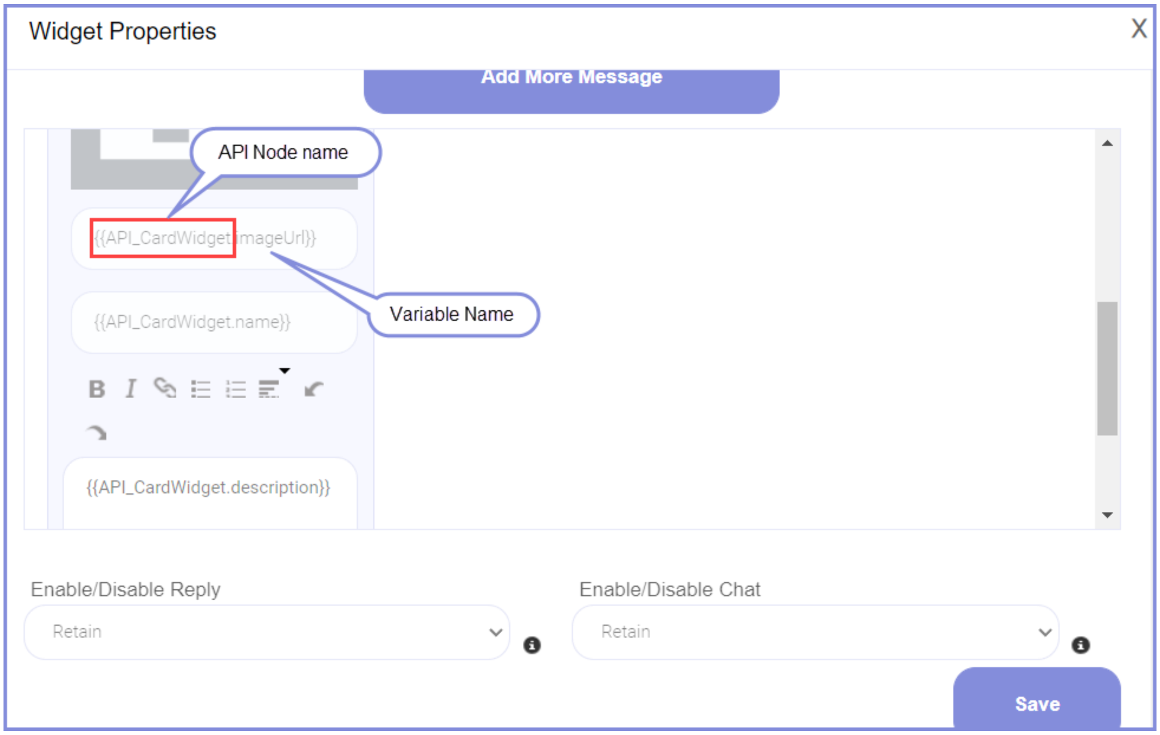


7. Click **Save** and **Deploy** to save and deploy the workflow successfully.

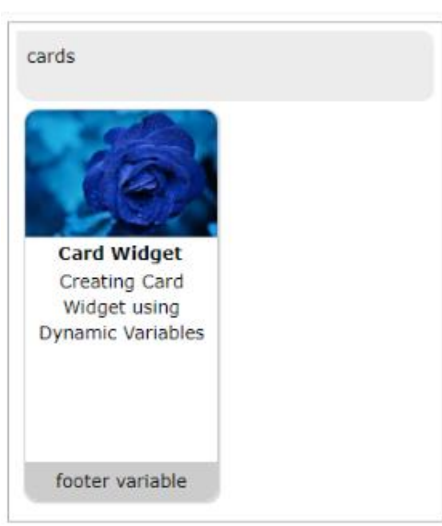
8. These variables can then be accessed within the card widgets.

Using Appiyo Defined Variables in Card

You can dynamically call and use the variables (imageUrl, name, description, footer) defined in Appiyo in the card widget as shown below:



The card in the output launch be like:

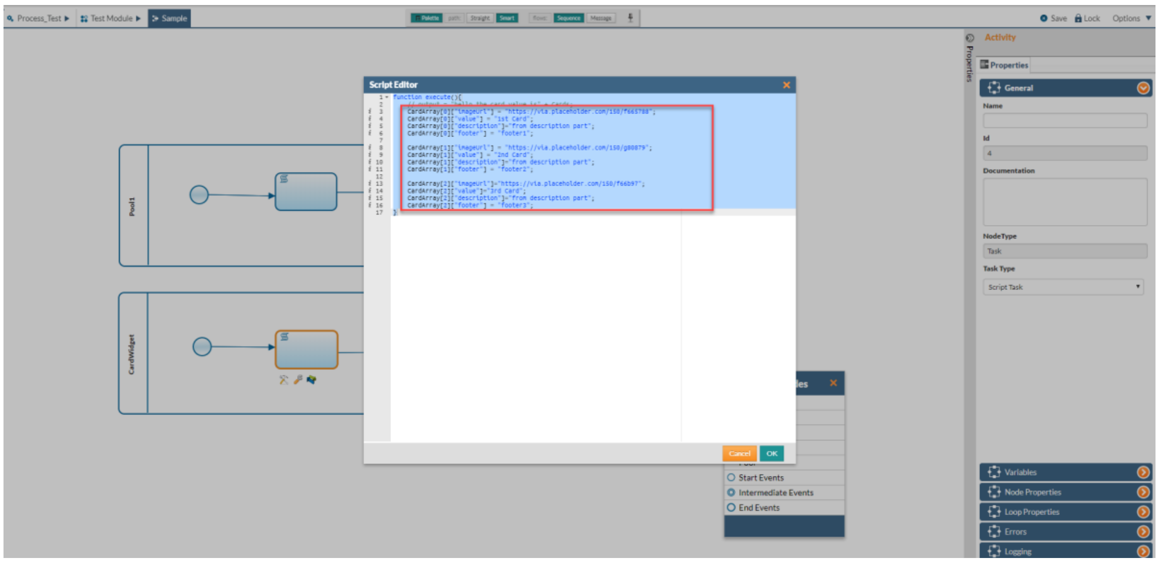


Next feature **Message Preview** allows you to view the messages you have created in message templates.

Render Multiple Cards at Run-time

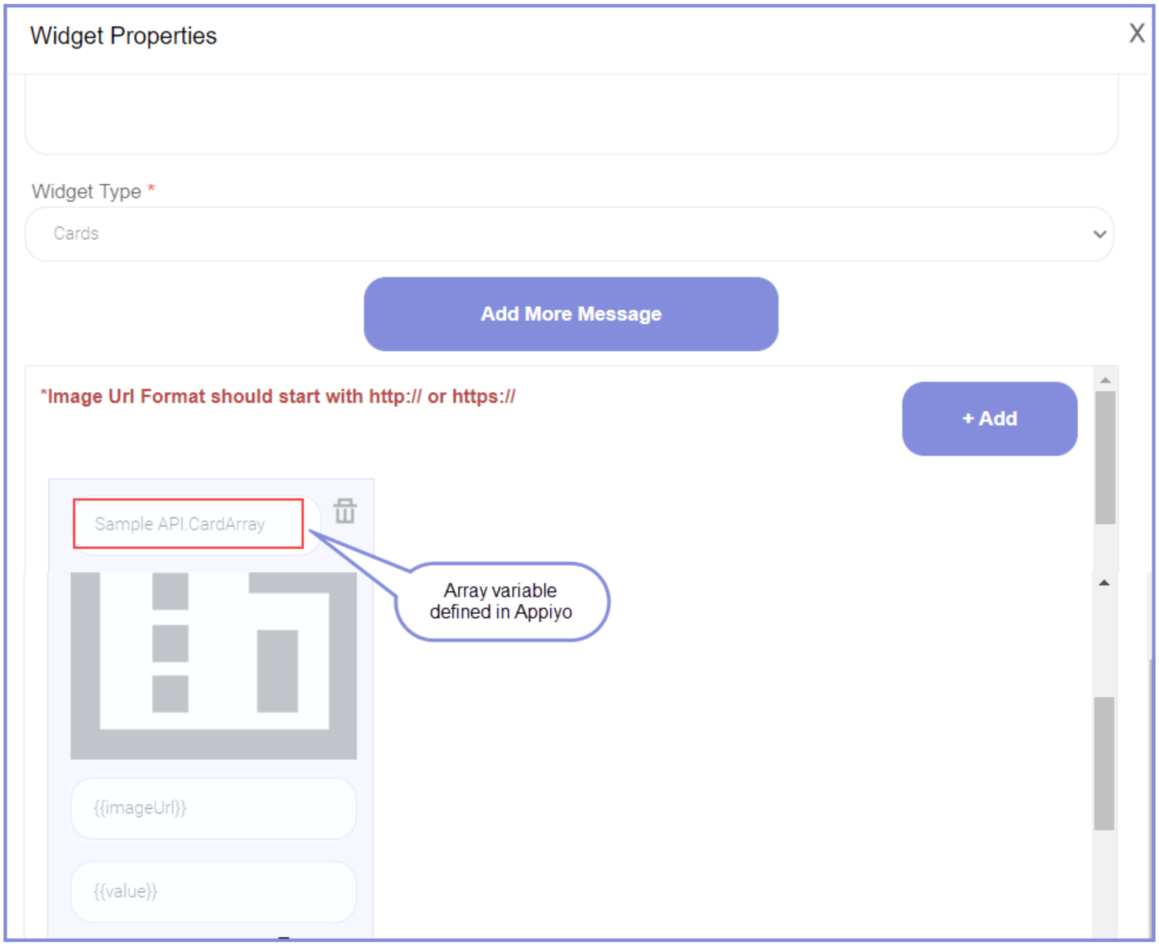
Multiple cards can be rendered at run-time using the array variable.

Define an array variable called **CardArray** and assign them the values in a script task within Appiyo as you can see below:



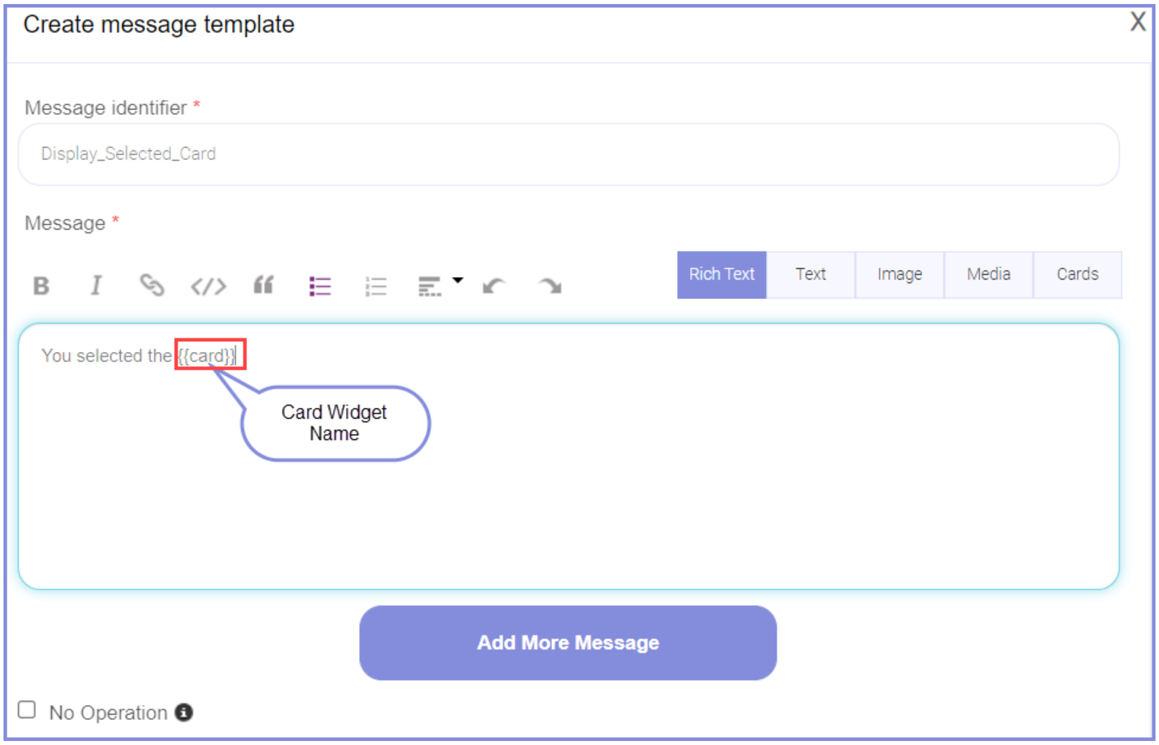
Remember to place the API node before the card widget. Then call the work-flow (In this example, Sample) and process (CardWidget) associated with this card widget using Twixor Compute option.

Below diagram shows the properties of the card widget that can be used to render the array variable.

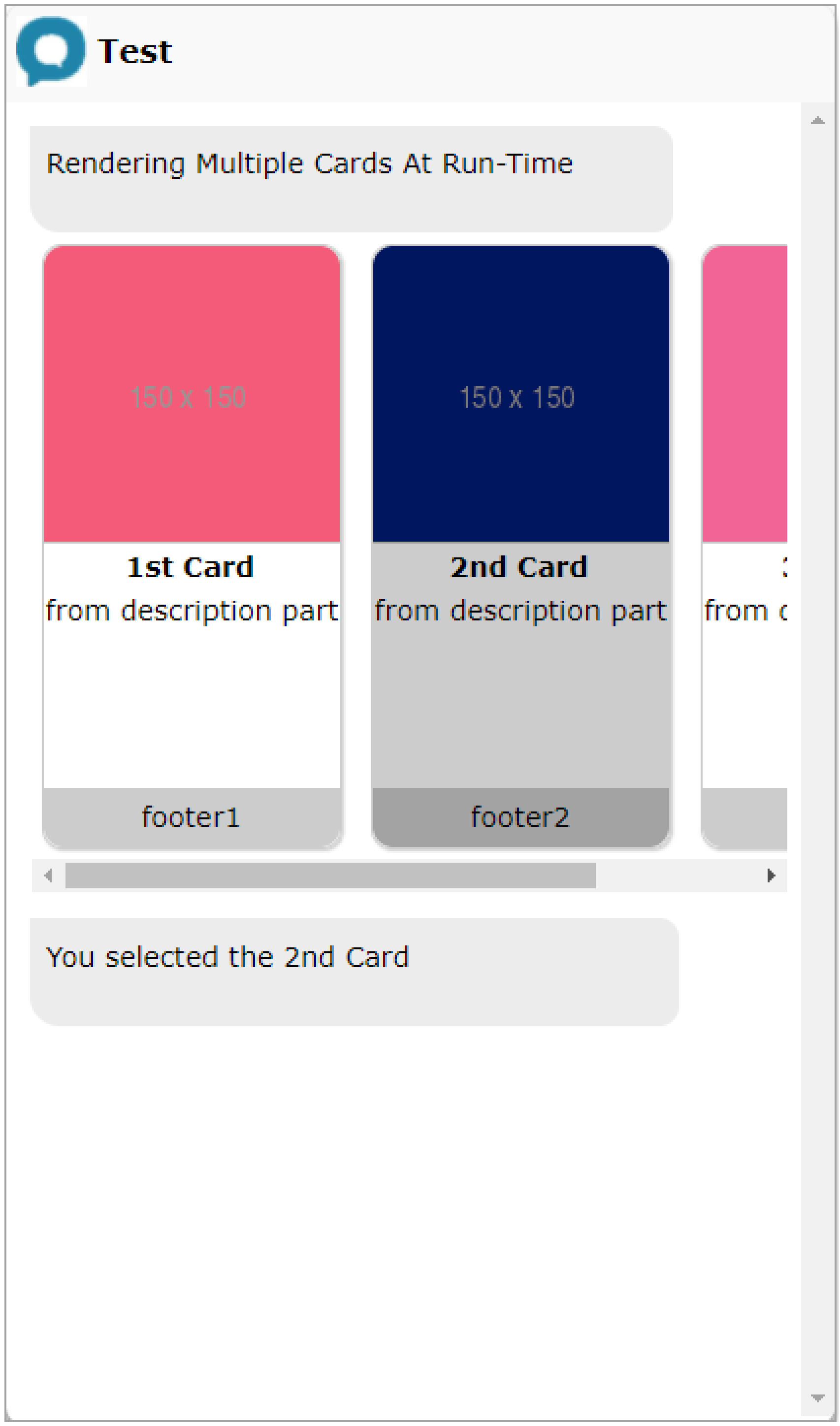


And other variables **imageUrl**, **value**, **description**, and **footer** are given within **double curly brackets** in order to fetch the associated values assigned in Appiyo.

You can also notify the users about the cards selected by them. To do so, place a message template after the card widget.



Launch this EnCap so that you will be able to view multiple cards rendered at run-time.

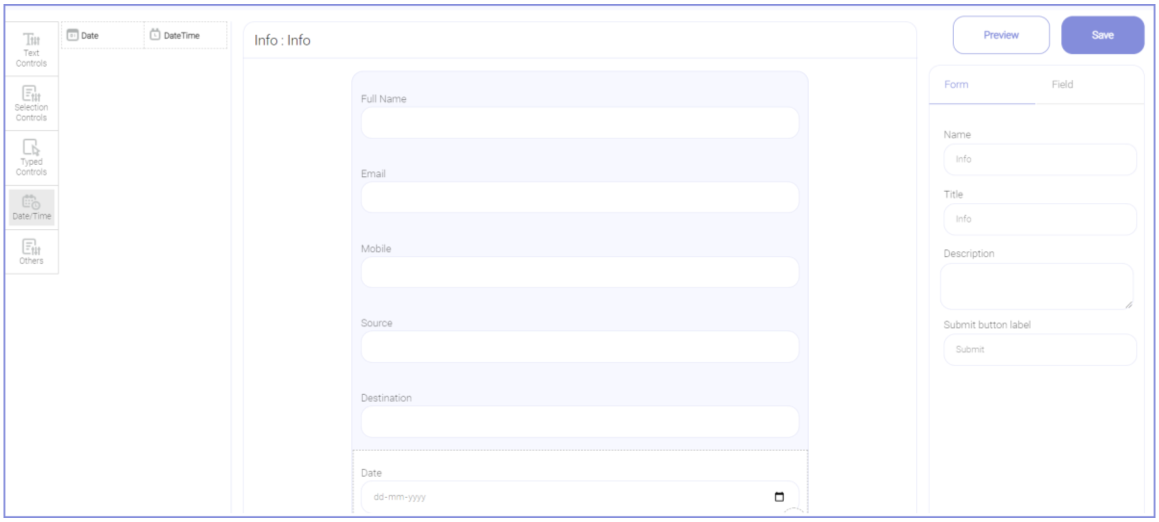


Rich Cards

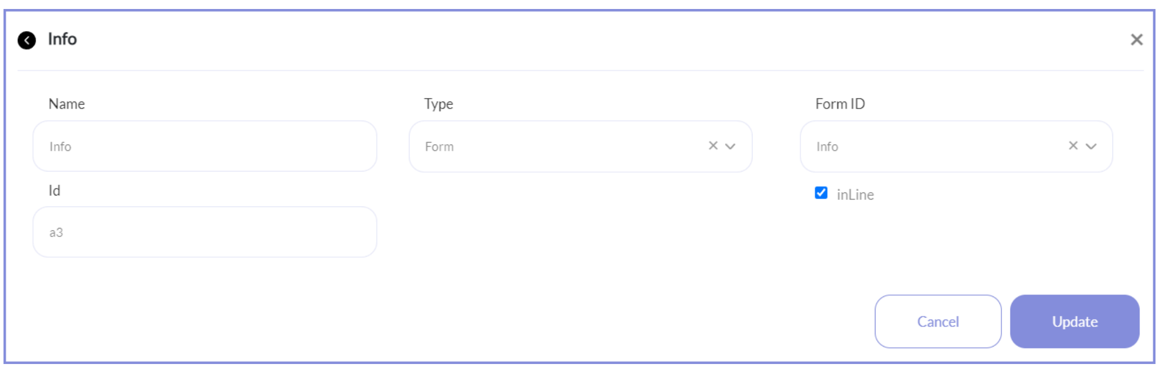
Nowadays most of the users are demanding visually appealing images rather than a plain text while searching for any content. That's why we have incorporated the Rich Cards feature to enhance the user experience without trans-coding your message.

Let's take an example of the Airline use case and create a rich card for Acme Airlines.

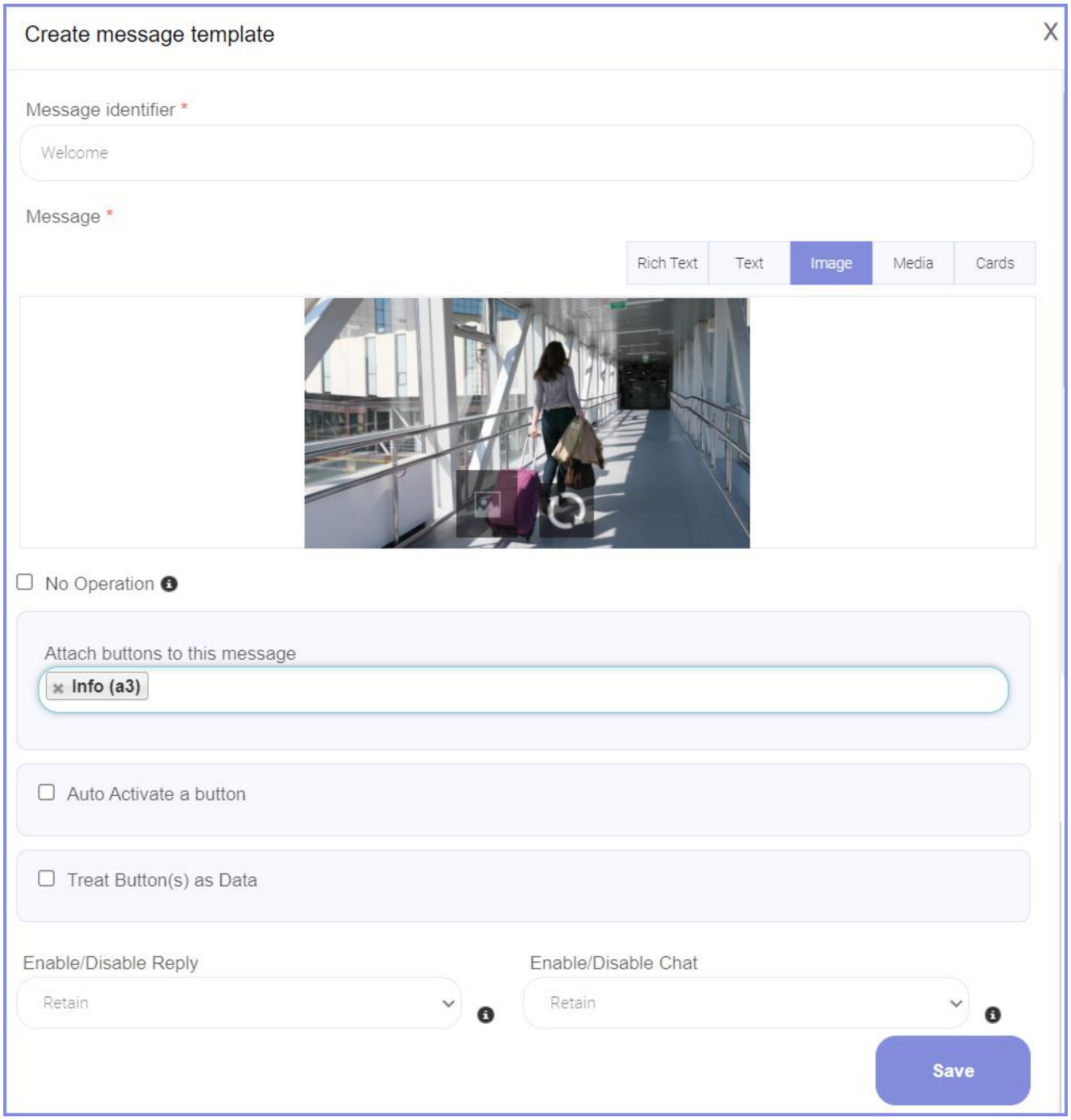
- To begin with, let' create a new EnCap called **Rich Card** and an inline form called **Info** to get the boarding details of the customer. To create a form, refer to Create and Delete Forms in EnCaps guide.



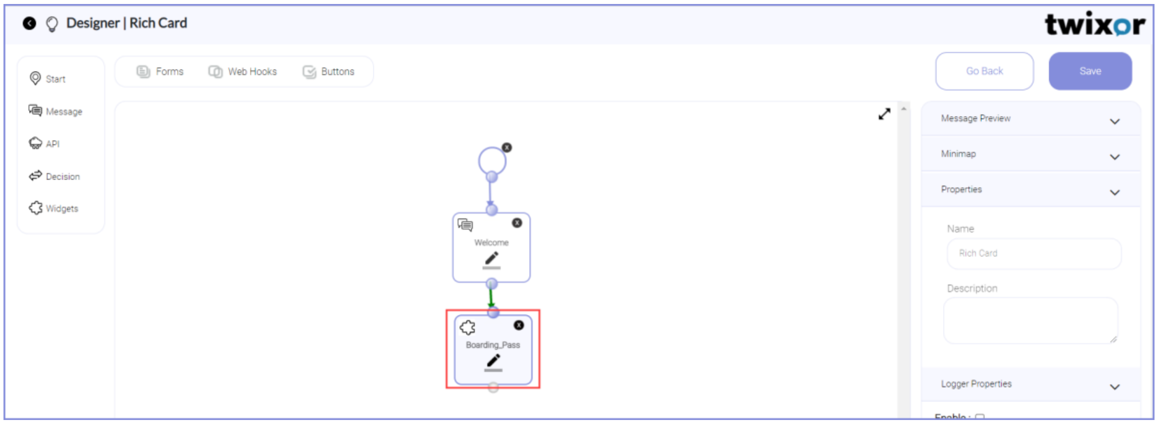
- Then create a button called **info** to call the info form created in the previous step.



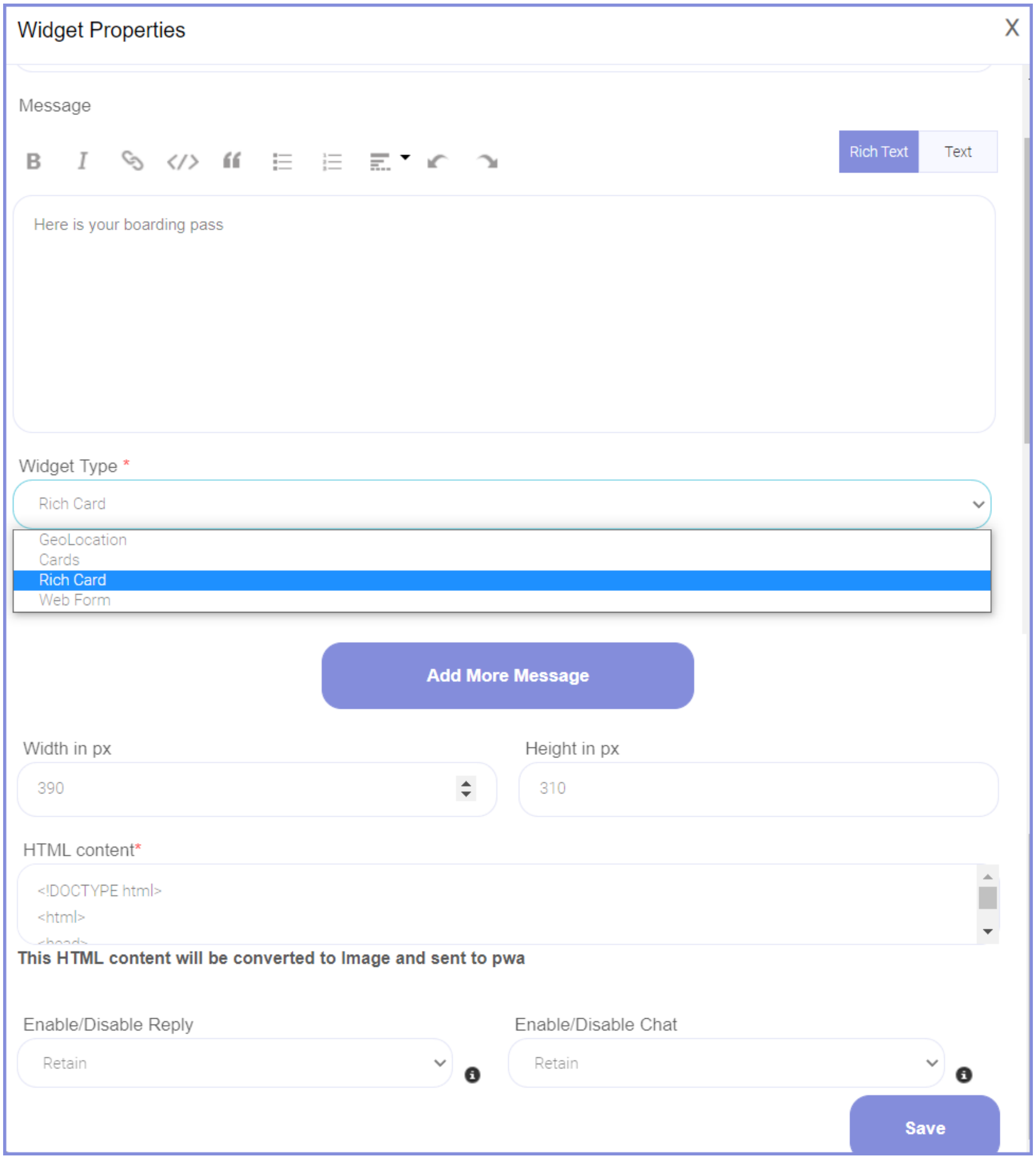
- After creating the form and button, drag and drop the **Message** node and create a message template to welcome the customer. To create a new message template, refer to the Creating Message Templates for EnCap guide.



- Drag and drop the **Widgets** node and select the Widget type as **Rich Card**.



- Give the **Height** and **Width** of the rich card in pixels.
- Place the HTML content that will be converted to image (with embedded QR Code) and sent to PWA.



- Click **Save** to save the rich card. When this EnCap is launched using the steps given in the Launch Configuration guide, the output of the rich card will be:

Rich Card

Welcome to Acme Airlines

Please fill the below information to proceed further.

Full Name *

Carson

Email

carson@gmail.com

Mobile

23434343434

Source *

HAM

Destination *

MAD

Date

24-Jan-2020

Submit

Acme Airlines

Flight

634

PRIORITY

Passenger

HAM ✈ MAD

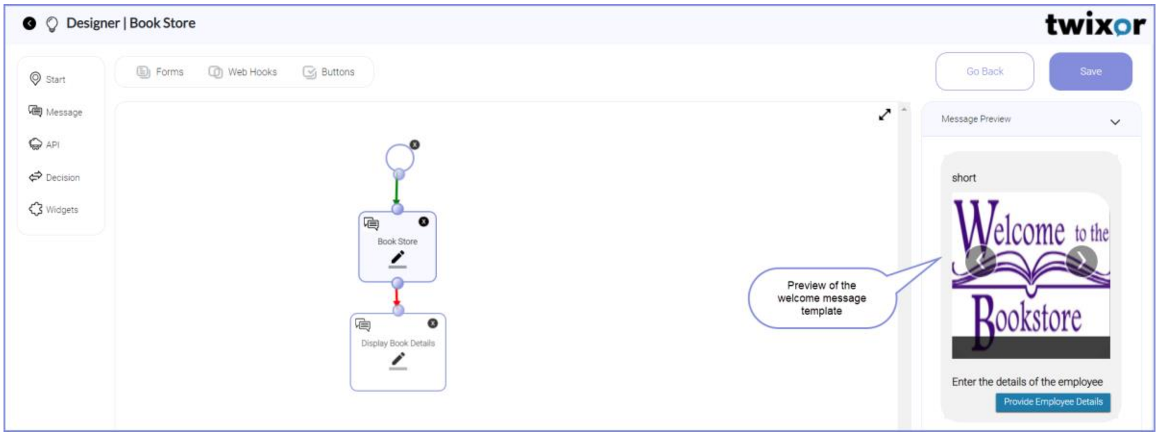
Boarding	Depart	Terminal	Gate	Seat
5.50PM	6.20PM	G2	B42	4A

Here is your boarding pass

Message Preview

You can view the way your message gets displayed in **Message Preview** section. Message Preview section will be available on the right side of the **EnCap Designer** page.

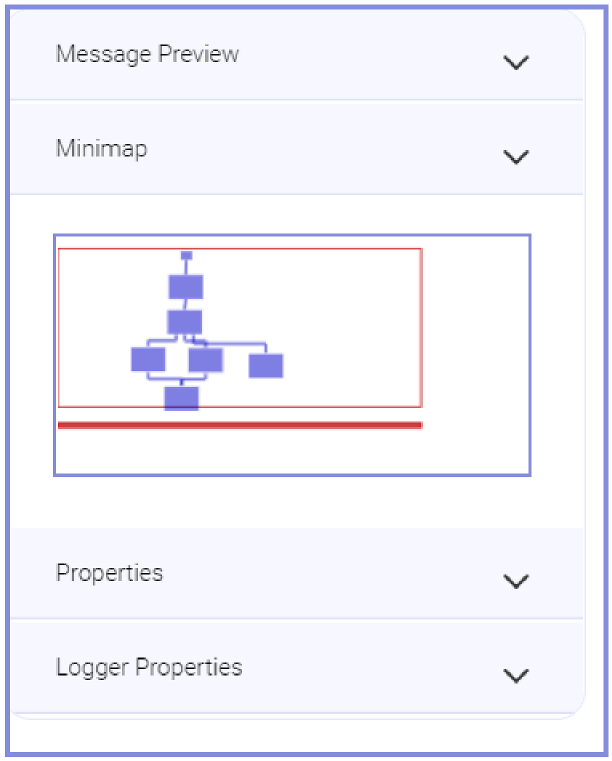
For example, click the Welcome message template to preview it on the right side.



Minimap lets you orient yourselves within the entire work flow.

Minimap

Minimap is to give a miniature overview of the entire EnCap workflow. The entire workflow will be reflected in Minimap as shown below:

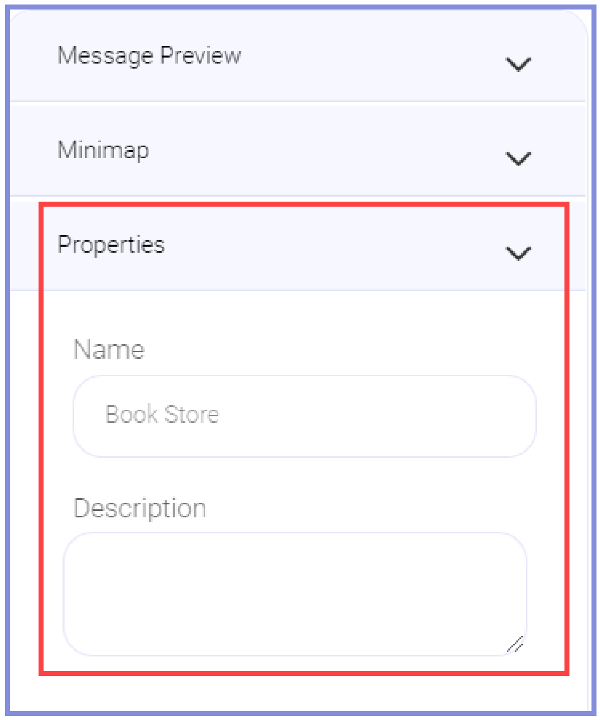


Point to any part of the minimap to view the selected region in the main workflow.

View an overview of the message templates from **Message Properties**.

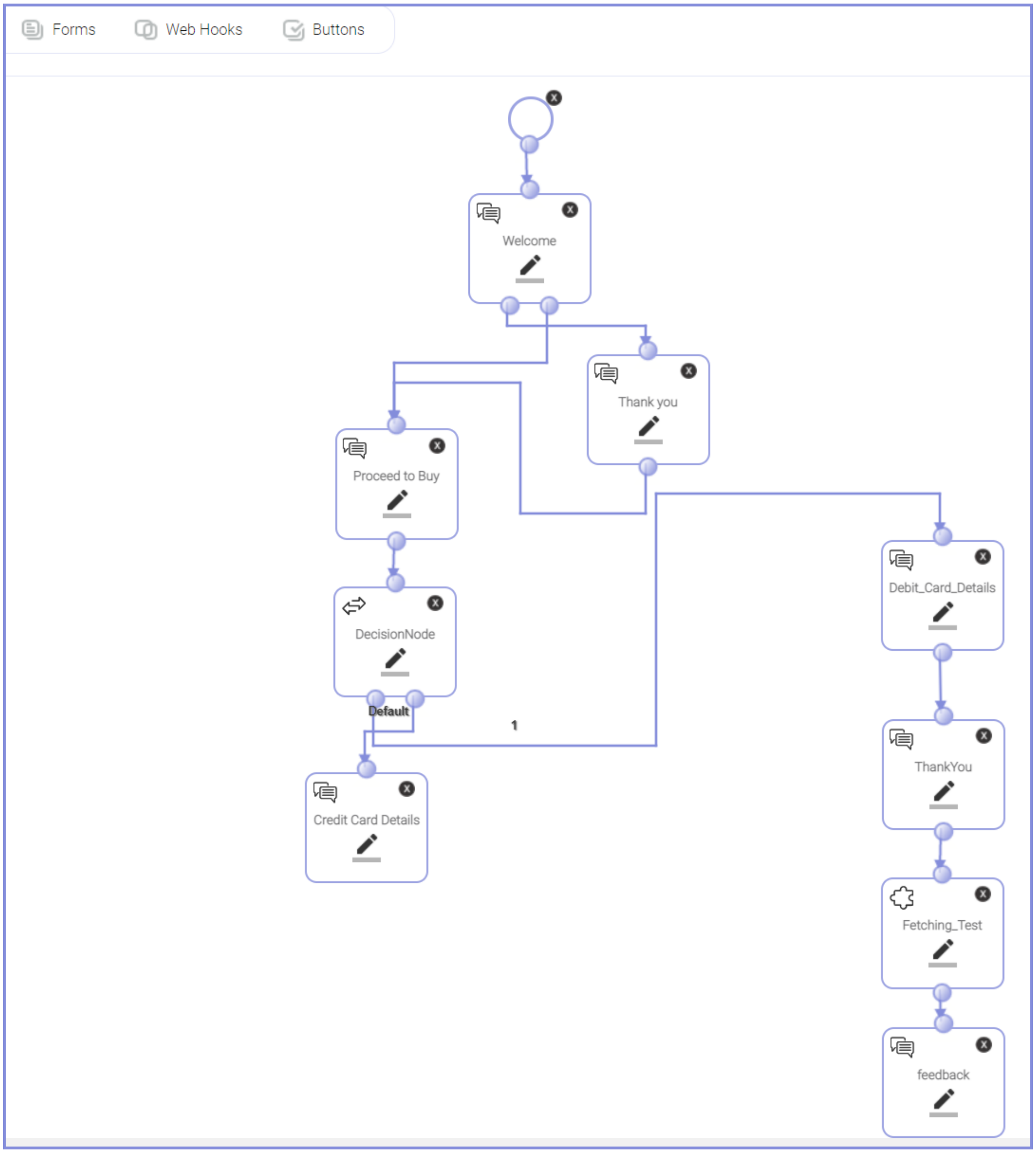
Message Properties

Properties section reflects the **Name** and **Description** properties of the EnCap. By default, **Name** field will be the name of the EnCap given during its creation. You can alter the Name and Description for the EnCap here.



Final EnCap WorkFlow

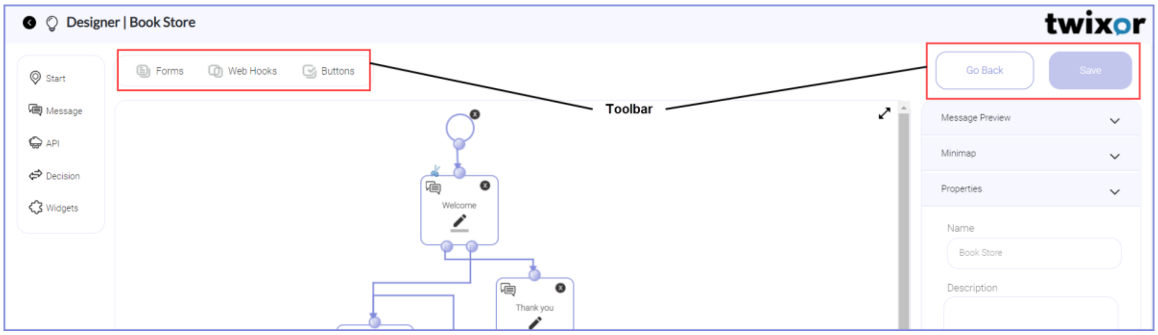
After connecting all the nodes in the workflow by an arrow, the final workflow of the Book Store look like this:



After designing the workflow for the EnCaps, launch the EnCaps by following the steps illustrated in **Launch Configuration** guide.

Toolbar

A Toolbar for navigating to Forms, Web Hooks, and Buttons is also added to the EnCap flow builder. If you want to view or configure any forms, webhooks, or buttons while designing the EnCap workflow, you can use this toolbar.

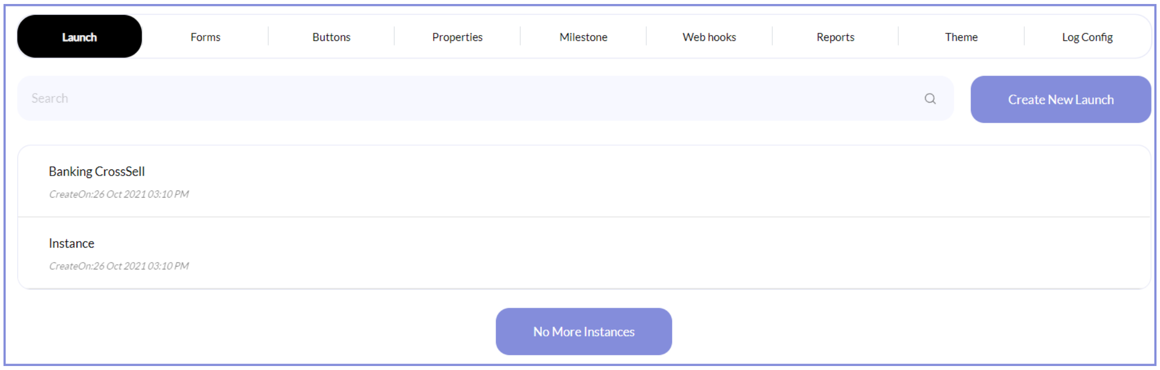


You can navigate to "**Launch History**" page by clicking **Go Back** button. Click **Save** to save the EnCap WorkFlow.

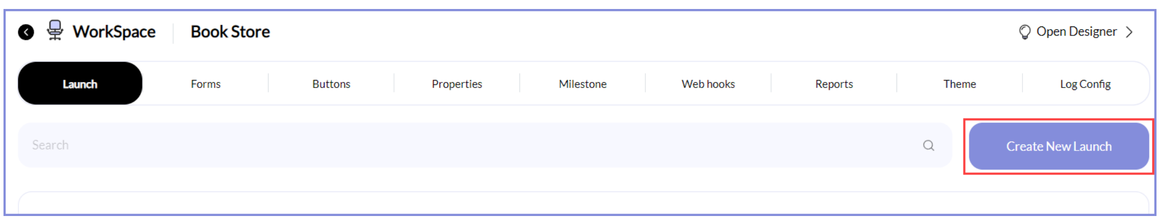
Configure Launch

To create a launch for an EnCap, click the EnCap name for which you want to create the launch and follow the steps below:

1. You will find the history of existing launches for the selected EnCap in **Launch History** page. Click to alter the launch configuration and to delete the selected launch.



2. If you want to create a new a new launch for the selected EnCap, Click **Create Launch** button. For example, if you want to launch the BookStore EnCap, select the Book Store EnCap and click **Create Launch** button.



> **Info!** If you don't have any other launches for the selected EnCap, you can also create the launch by clicking **"Create Launch"** in the message **Create your first Launch "Create Launch"**

3. This will open **Launch Configuration** page. Configure the new launch in this page by giving the following inputs.

4. Enter the **Name** for the new launch.

5. You can launch your EnCap by selecting any one of the three modes namely **Bulk**, **API**, and **Link Only** from **Launch Mode**.

6. Choose the broadcasting medium from the list of available channels to promote the selected EnCap launch from **Select Channel** option. You can select either SMS, WhatsApp, Twitter, or Messenger option.

Info! SMS channel is available in the current version of Twixor EnCaps

7. Select the appropriate channel configuration from **Select Channel Config**. New channels can be configured by creating new channel in **Channel** page that will be illustrated in the **Create Channel** guide.

8. Enter the introduction message for the EnCap in **Message** in the format **Your Welcome Message {{url}}**.

Info! {{url}} is the placeholder for the EnCap URL

9. You can upload the list of customer details through an Excel file using **Upload using Excel File** option. The Excel file must contain the customer details like Customer Name, Customer Mobile Number, Address, etc.

Info! Upload using Excel file option will be enabled only in **Bulk** mode. And, the Excel file should contain **phoneNumber** as the mandatory column

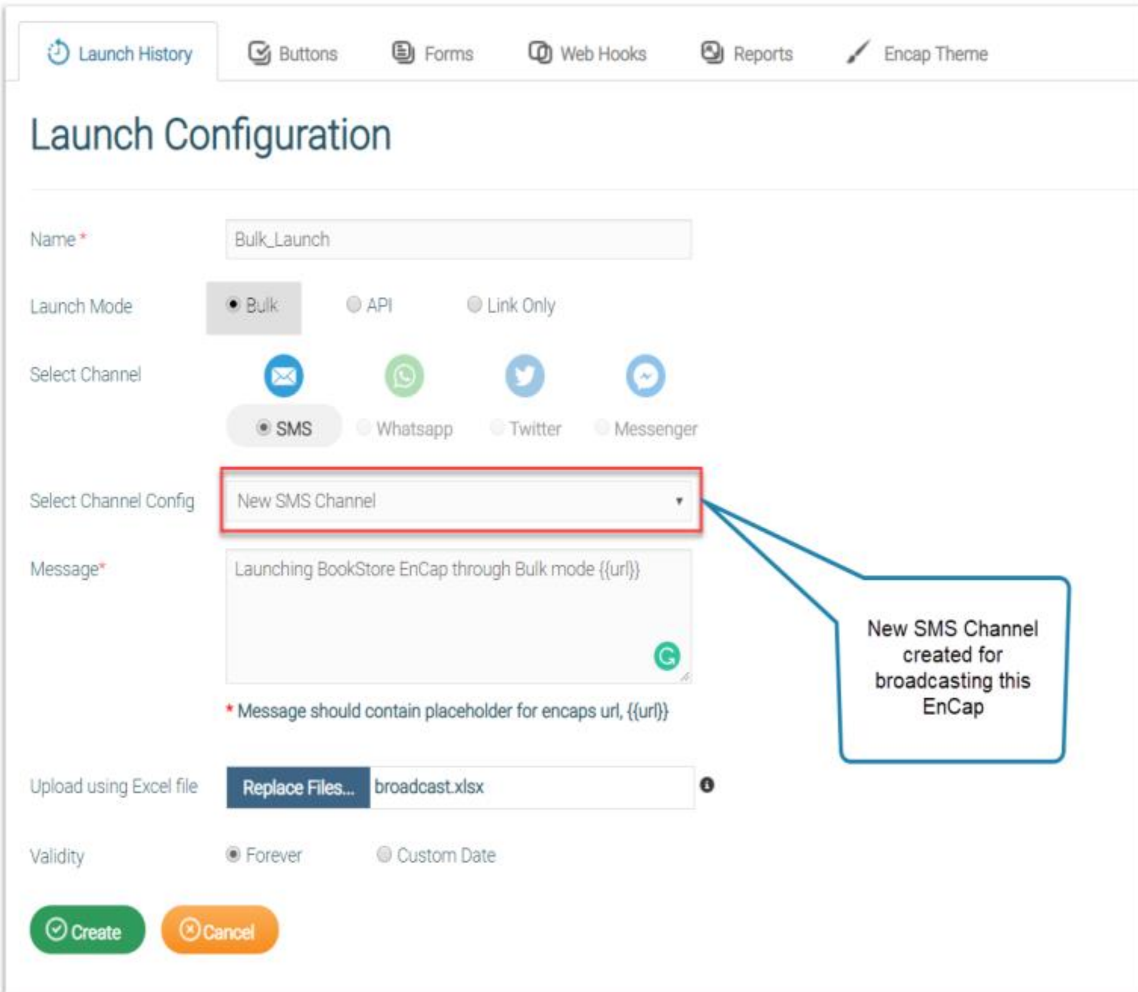
10. Pick the expiry date of the EnCap from **Validity**.

- Choose **Forever** for never ending EnCaps.
- Select the **Custom Date** option to choose expiry date of the EnCaps from **Expiry Date**.

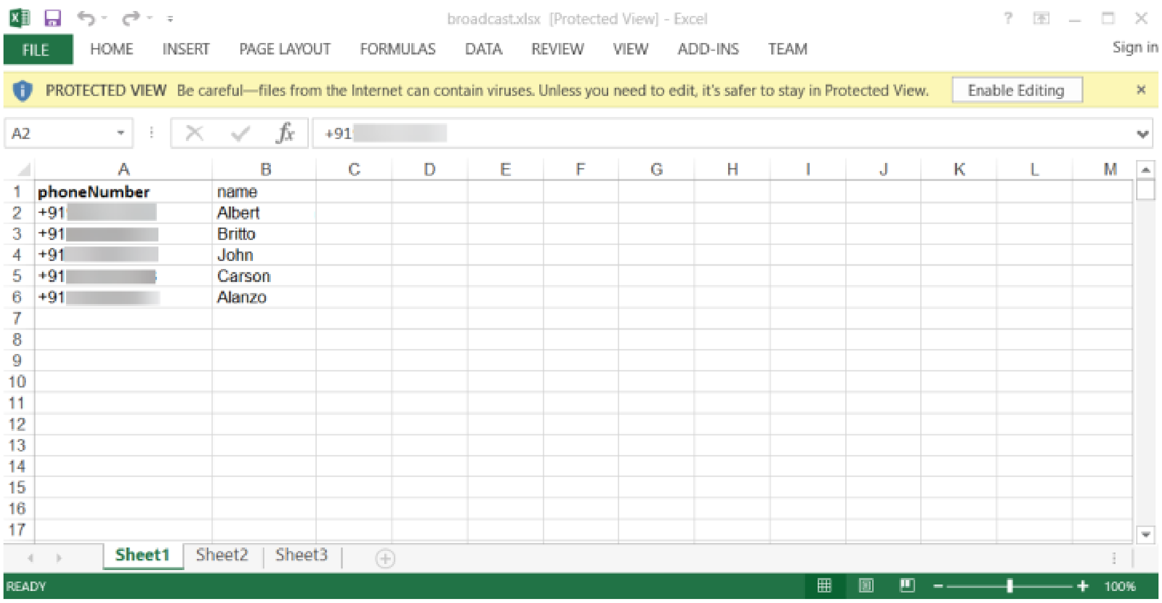
11. Finally, click **Create** to configure the launch.

Launching the EnCap through Bulk Mode

If you want to send the EnCaps to a group of customers, you can use **Bulk** mode. Give the inputs in the appropriate columns.

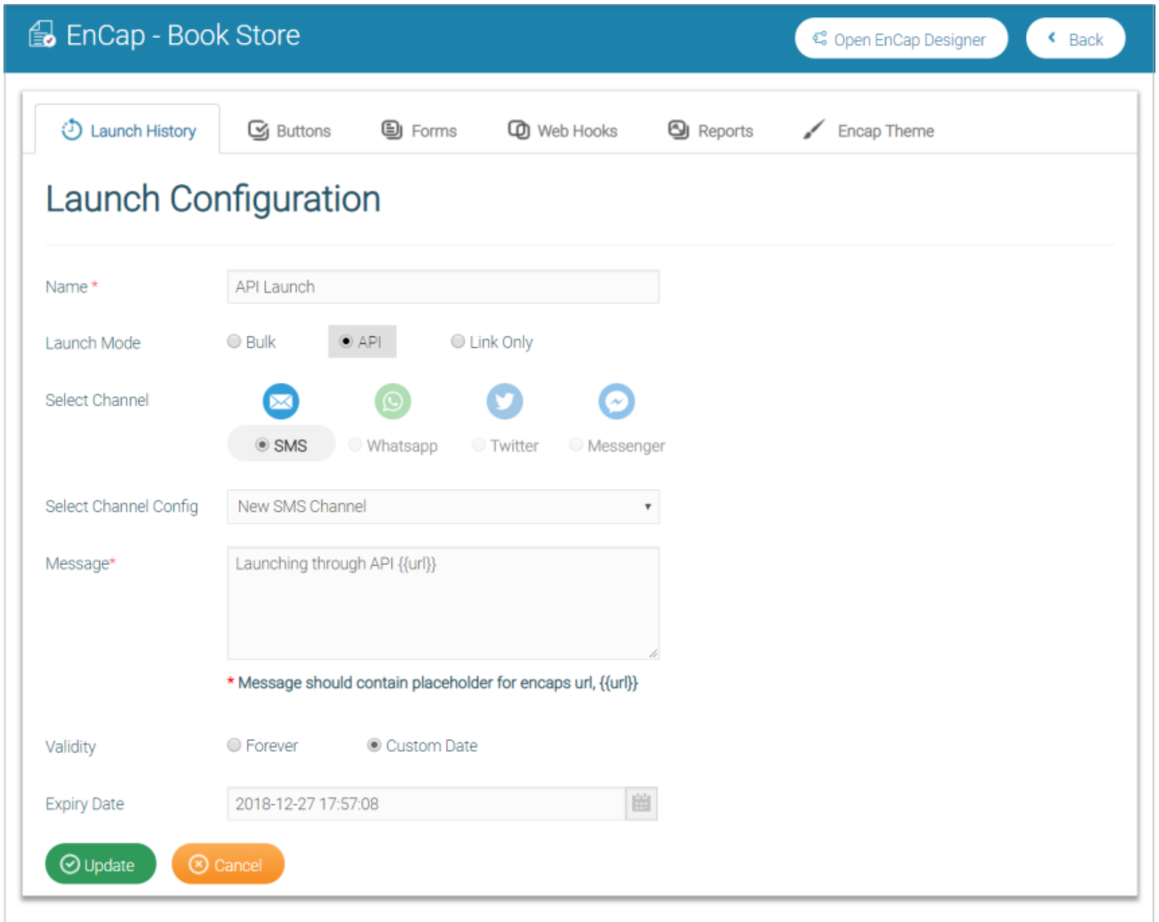


Broadcast.xlsx file is uploaded to send the selected Launch to a bulk of customers. The Broadcast Excel file contains the phone number of the customers to whom the EnCaps are to be sent.



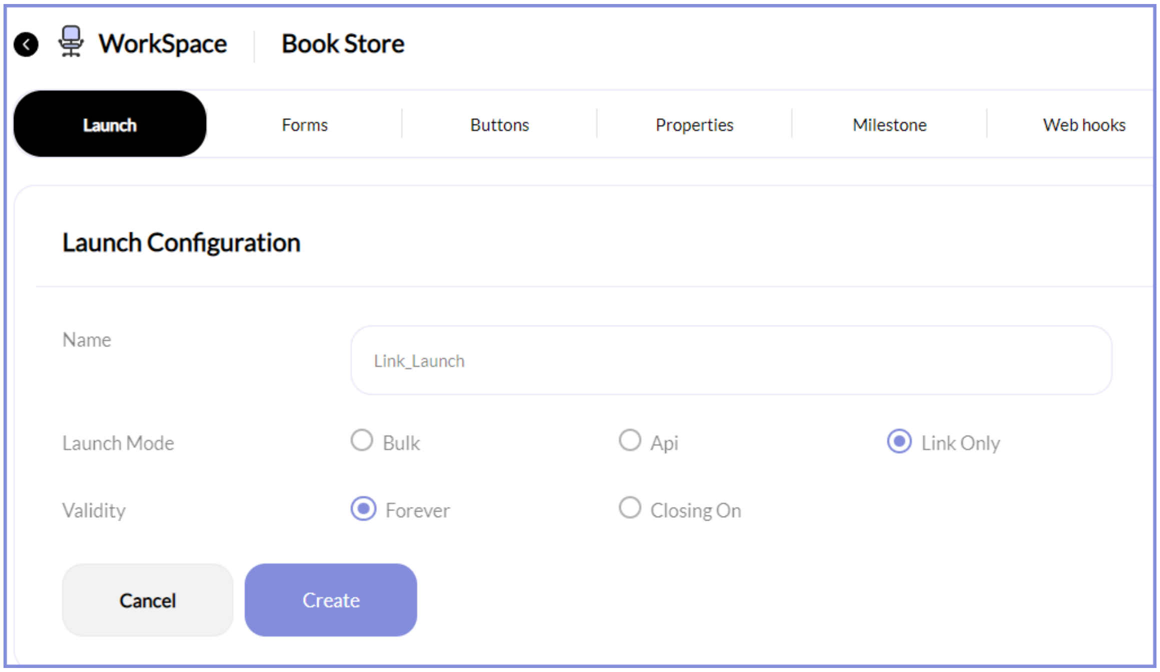
Launching the EnCap through API Mode

With this mode, you can automatically send one EnCap to many persons rapidly responding to an API call. Launch configuration using API mode can be shown in the figure below:



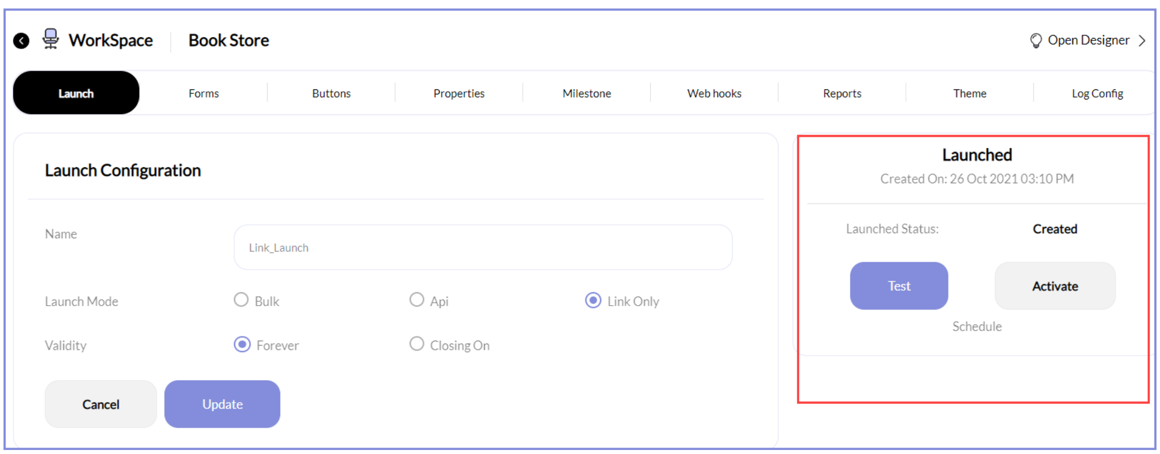
Launching the EnCap as Link

You can send the EnCap as a Link using this mode.



Status of Launched EnCaps

In the right side of the **Launch Configuration** page, status of the instance will be shown.



It displays the following information:

- Total number of **Launched** instances.
- Total number of messages sent in **Total Message**.
- Date on which the launch was created in **Created on**.
- Current status of the instance in **Instance Status**. It can be either Created, Started, or Stopped.

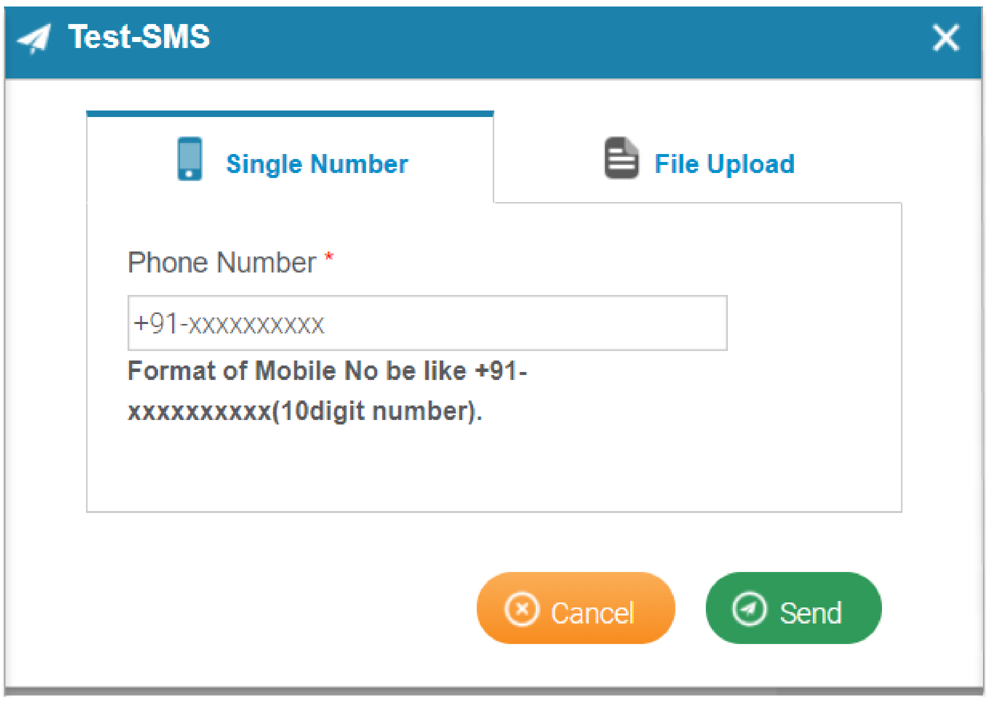
Testing the Launch Configuration

Prior to launching the EnCaps, you can test it here for any errors.

For testing Bulk and API Launch

1. Click **Test** button.

2. Select the **Single Number** tab if you want to send the EnCap SMS to a single mobile number. Enter the test **Phone number** to be which the EnCap is to be sent.



> **Info!** The Phone Number should be +91-xxxxxxxxxx(10digit number)

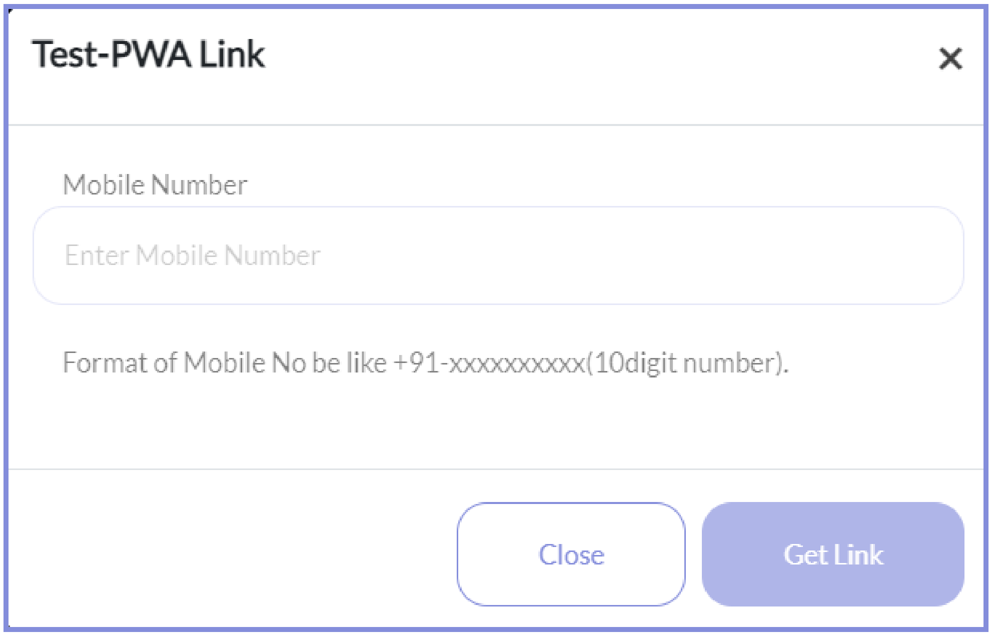
3. Click **File Upload** to test the launch by sending Bulk SMS. Click **Add File** to upload the excel file containing customer details.

4. Click **Send** to send the created launch to a single number or a group of numbers.

For Testing PWA Link

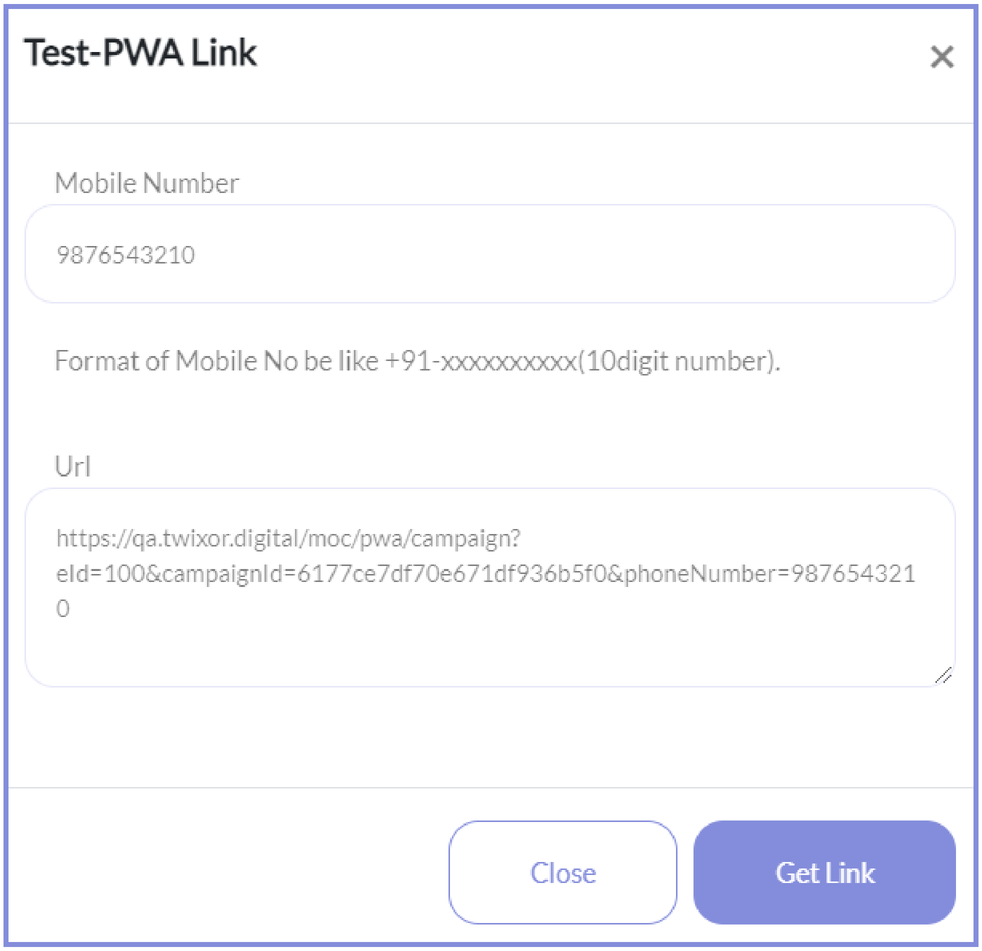
1. Click **Test** button.

2. Select the **Single Number** tab if you want to send the PWA link to a single mobile number. Enter the test Phone number to be which the EnCap link is to be sent.



3. Click **Generate Url** to generate the test URL for Link Only Launch Mode. You can check this URL in any of your devices.

The Url is generated as shown below:



Passing Parameters in URL

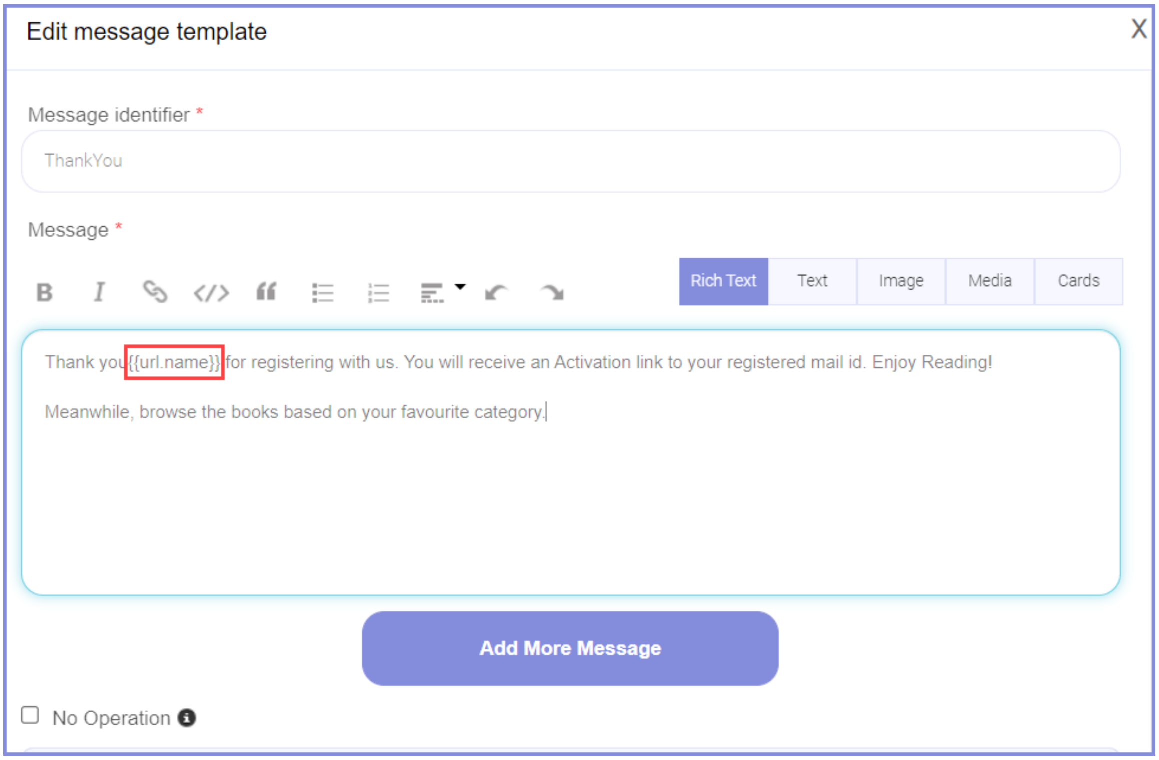
Twixor EnCaps also allows you to **pass** the additional **text** and **numeric parameters** in the **URL** that can be **referred** anywhere in your **EnCap flow**.

For an example, let us pass the **name** parameter in the generated **URL** as given below:

> https://aim.twixor.com/pwa/campaign?eId=103&campaignId=5bfbe8e6f5c0ae73cfefdd&phoneNumber=1234567891&**name=John**

This parameter can be given in the **{{URL.ParameterName}}** format in order to access it in the EnCap flow.

In this example, the **name** parameter can be used in the **Thank You** message template that we have used in the Book Store EnCap flow as shown below:

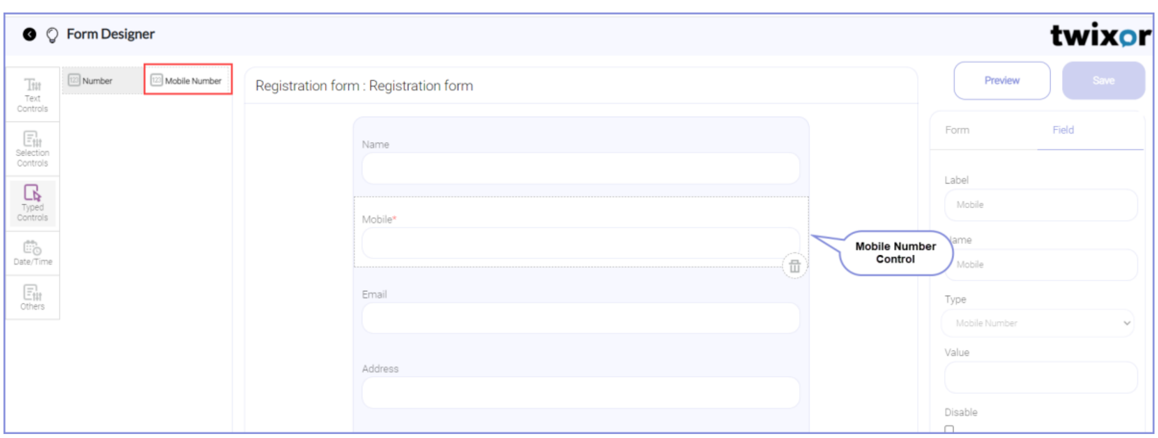


Below shown is the output launch after passing the name parameter in the URL.

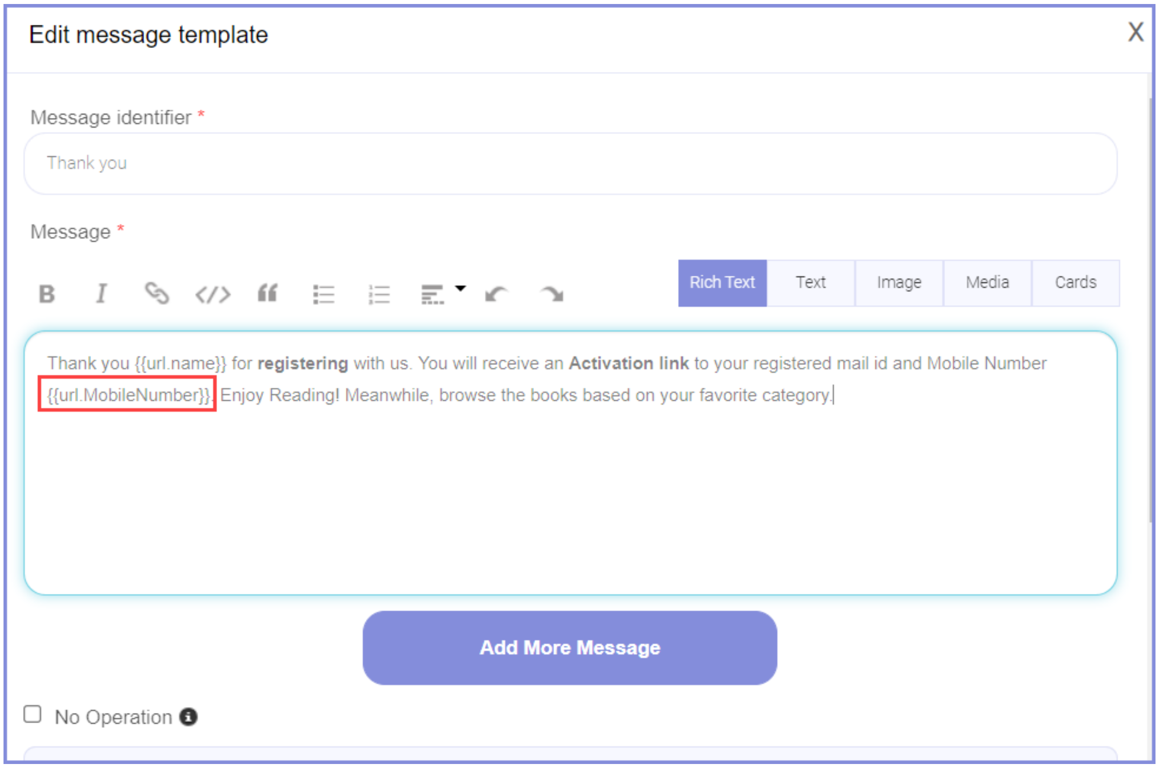
You can also have the option to pass the **numerical parameter** in the URL.

In another example given below, **MobileNumber** can also be passed and made to display in the thank you message displayed after the registration.

Mobile Number control is used in the registration form as shown below:



In the Thank You message template, refer the **Mobile Number parameter** in the same way as we already did using the **Name** parameter in the Thank You message.



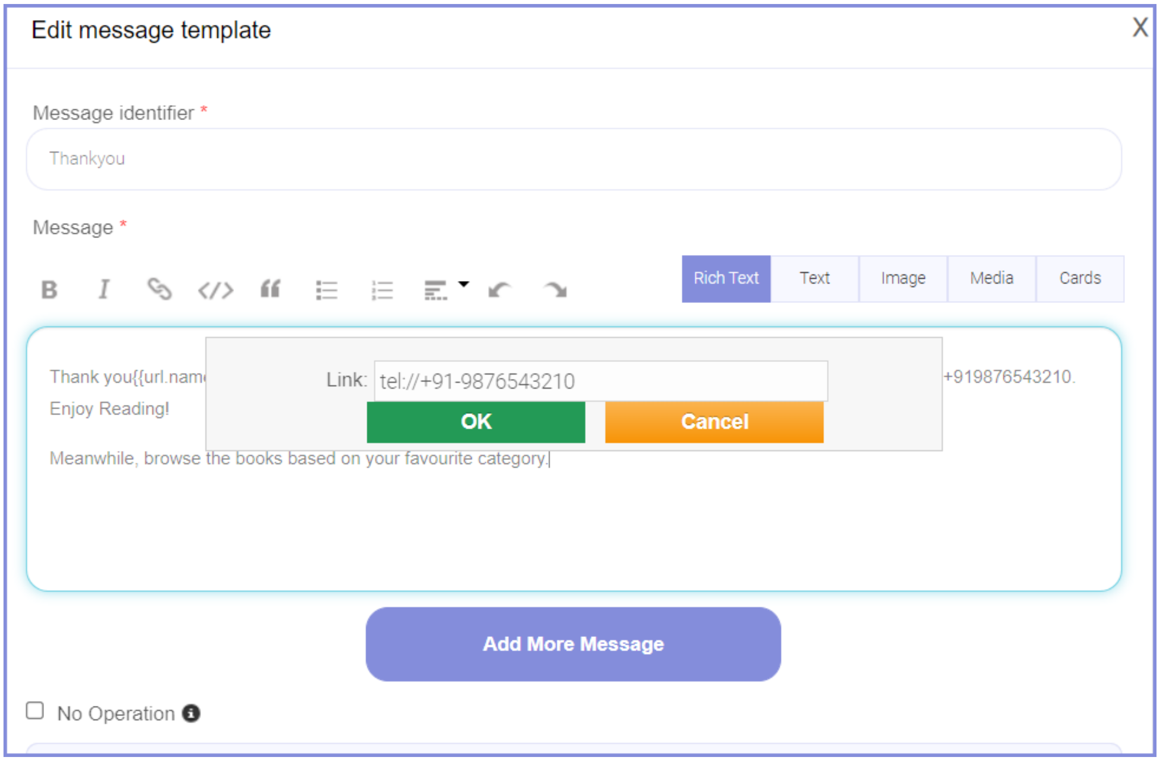
Pass the **Mobile Number parameter** in the link as given below:

https://aim.twixor.com/pwa/campaign?eId=103&campaignId=5c176dd82cf01e93e3ea1612&phoneNumber=%2b91-123456789&**name=John**&**Mobile Number=123456789**

Now, let's view the thank you message in the output launch after passing the **Name** and **Mobile Number** parameters below.

Click to Call Links in EnCap

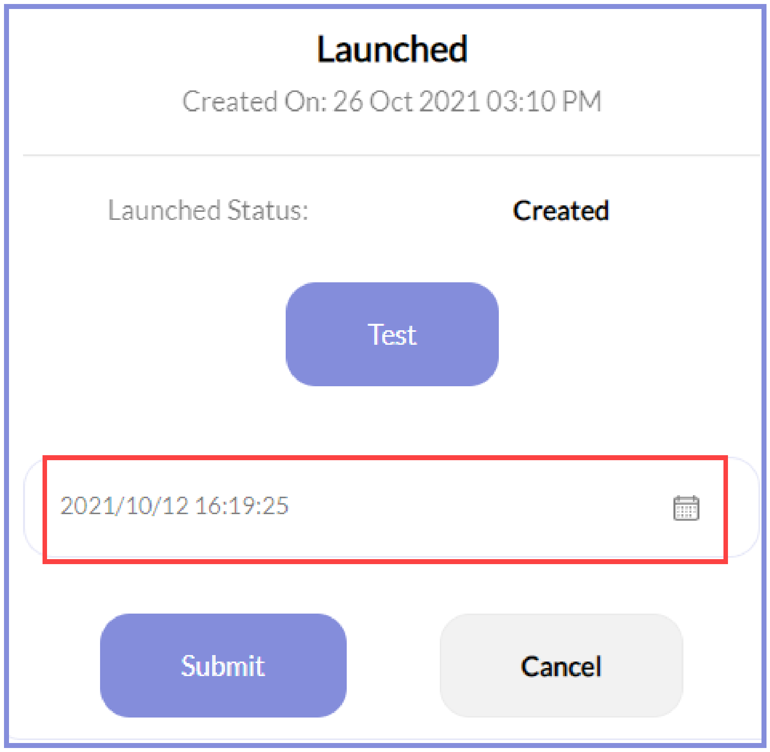
If you want to open the dialer for the phone number displayed on the EnCap message, insert a link for the mobile number using **tel**.



Output Launch after giving the link to mobile number look like this:

Scheduling the Launch

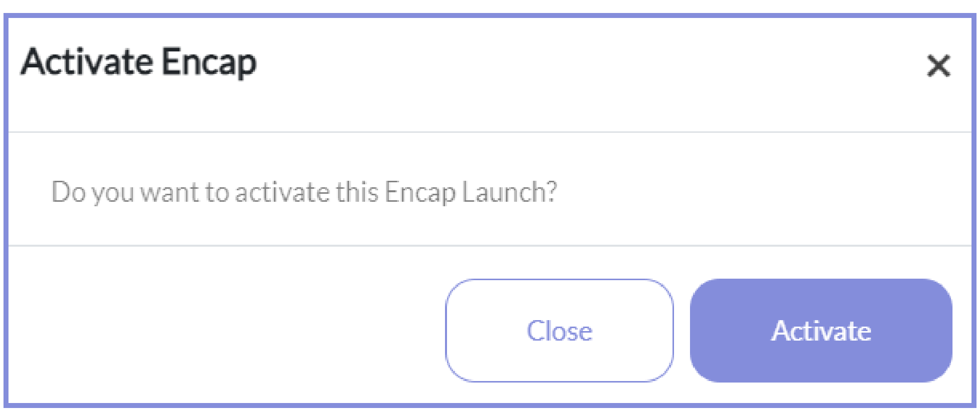
You can program the starting date for the launch. Click **Schedule** option and select the beginning date.



Then click **Submit** to start the launch on that specified date.

Activating the Launch

Finally, after finishing all the modifications, spark off the created launch by clicking **Activate** button. This will open a dialog box "Activate EnCap".



Click **Activate** to activate the launch.

> **Info!** You will view a message "**Success! Launch Campaign**" if the EnCap is launched successfully

The activated Book Store EnCap is shown in the video below:

Stopping the Launch

EnCaps whose validity period set as **Forever** will be active all time. Select the **Custom Date** option to choose expiry date of the EnCaps from **Expiry Date**.

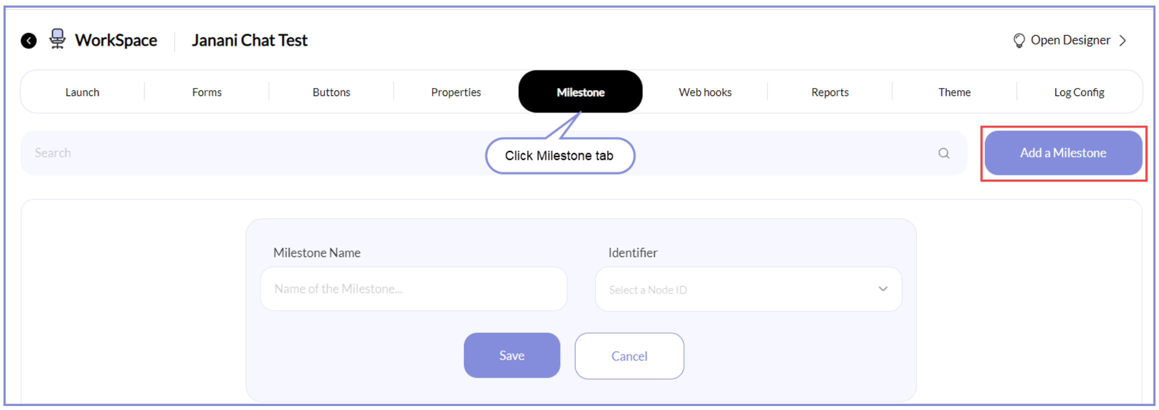
> **Info!** The EnCap launch remaining forever can be made to expire by changing its validity using **Custom Date** option

Configure EnCap Milestones

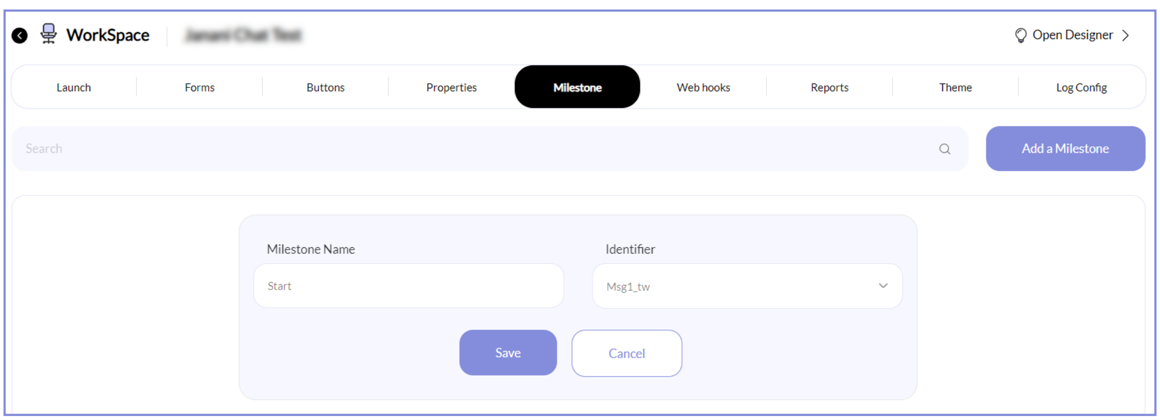
An EnCap milestone allows you to track the progress of your engaging campaigns from the start node to the end node. So, any node that's being tracked in an EnCap can be marked as a Milestone.

To add a milestone,

- Navigate to **EnCaps -> Workspace.**
- Select the EnCaps for which you want to add a milestone.
- Select the **Milestone** tab and click **Add a Milestone**.



- Give a name for the milestone in **Milestone Name**.



- Select a unique identifier of the node to which you want to add a milestone from the **Identifier** dropdown list.
- Click **Save** to add the milestone. You can view the number of users visited these milestones in **Reports**.

Post-EnCap Analysis Report

Campaigning is like a battle for digital marketers. You have to track and understand the impacts when an EnCap "is in wild" state. This can be done not only by the channels but also by analyzing and measuring the overall impacts of all the distinct marketing activities.

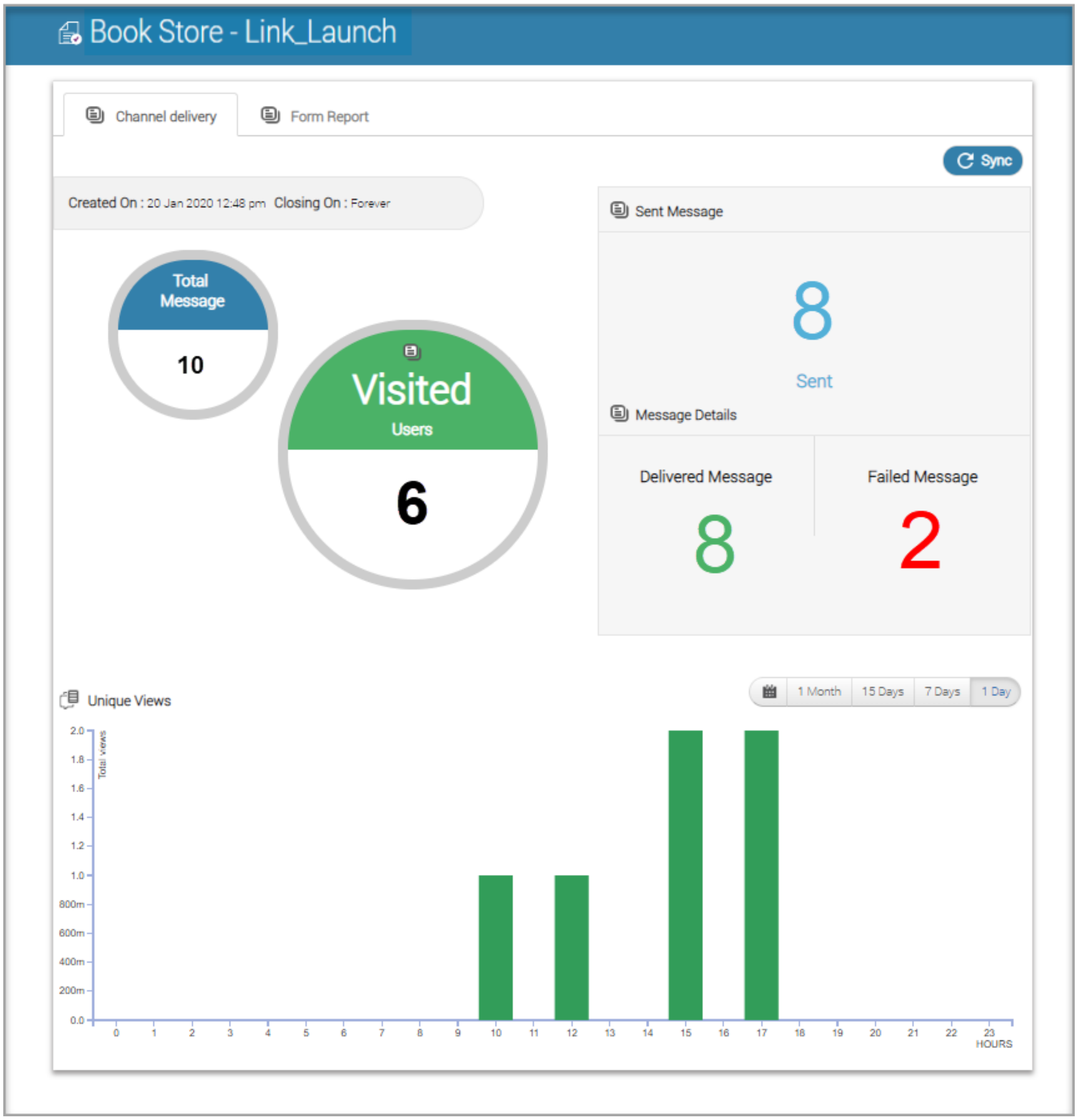
By means of Twixor EnCap's reporting feature, you can view the form and channel delivery report for all the EnCap launches.

This page takes you through different types of EnCap reports.

Channel Delivery Report

The Twixor EnCap's Channel Delivery Report is a solution to check your EnCaps delivered across multiple channels.

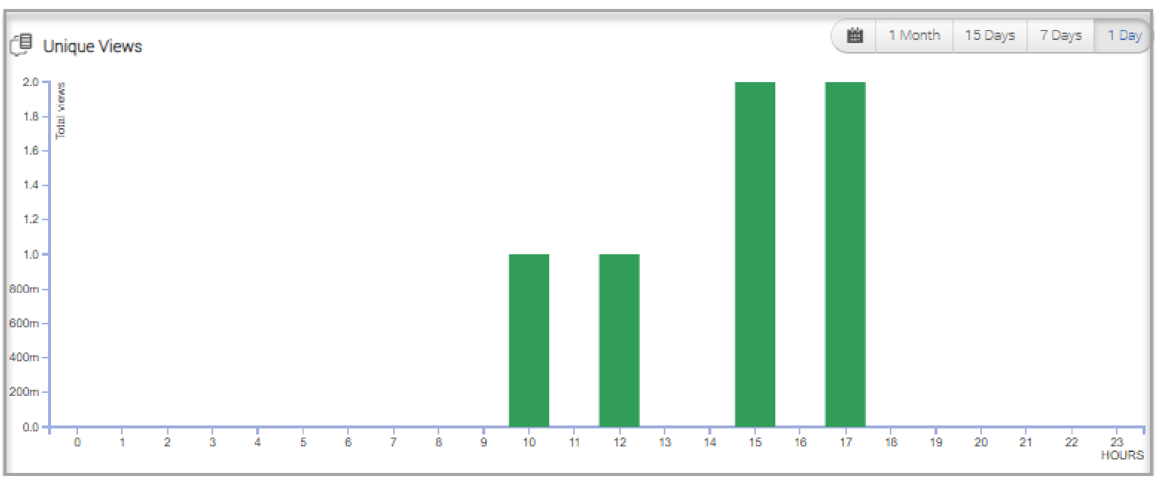
Click **Reports** tab and select the EnCaps launch name for which you want to view the report based on the delivery of EnCaps through multiple channels and click **Channel delivery** tab.



This dashboard gives a record of the following EnCap delivery logs:

Created On/Closing On	Date on which the EnCap launches were created/closed
Total Message	Total number of EnCaps sent through the selected channel
Visited	Total number of EnCaps visited by the users
Sent	Cumulative number of EnCaps delivered to the users
Failed Message	Total number of EnCaps failed to reach your customers

If you want to track the number of unique views of your EnCap, you can look out the **Unique Views** bar chart.



A unique view is the number of unique users who click your EnCap link. Here you can view the total unique views of launched EnCaps for the past 1 month, 15 days, 7 days, or 1 day.

EnCap Report

Here, you can assess the user expectations based on the Forms and EnCaps used in your product marketing campaigns. By this way, you can also spot the forms that are frequently viewed and used by your customers.

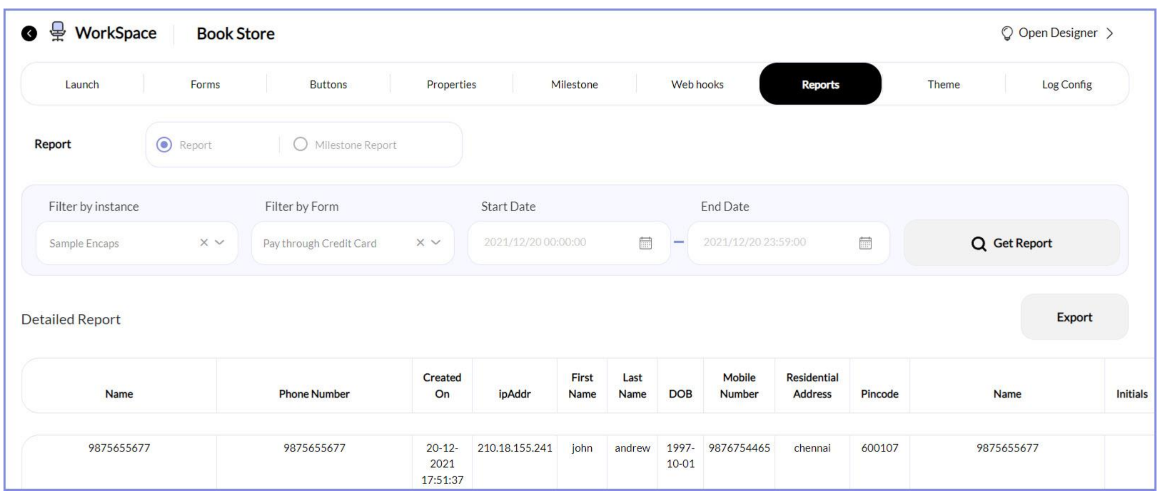
To view the report based on forms and EnCaps,

1. Select the launch for which you want to view the **Report**. Let us now view the form report for Link Launch of Book Store EnCap.

2. In **Filter by Instance** column, select the EnCap launch name and In **Search by Forms** column, select the form name to be selected. For example, if you select *Pay Through Credit Card* form, the detailed report for that particular form will be shown.

3. Select the **Start Date** and **End Date** to view the detailed form report of the EnCaps launched between these dates.

4. The detailed report for the particular EnCap and form will be displayed.



6. Click **Get Report** to view the report based on the selected criteria.

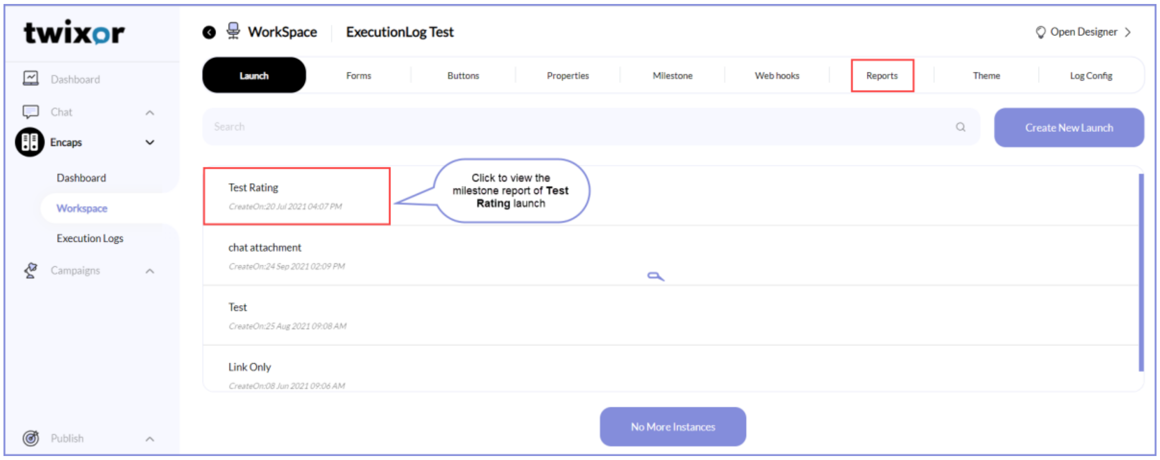
7. If you want to export the form report as **CSV** or **Excel** file for your future reference, click 

button.

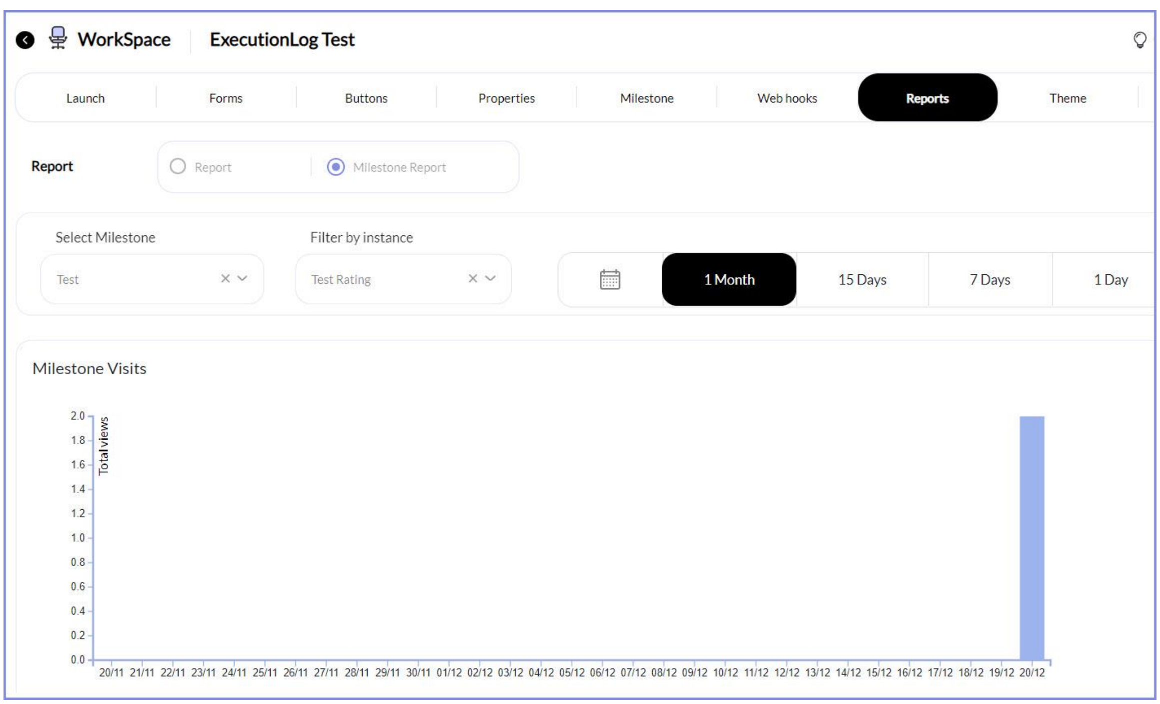
Milestone Report

The Milestones report visually represents the list of number of users who have visited the EnCap milestones for 1 day, 7 days, 15 days, and 1 Month. Simply put, Milestone reports help you oversee the overall progress and performance of the EnCap.

- To view the milestone report, select the EnCap and click **Reports** tab.
- Click the EnCap launch for which you want to view the milestone report.

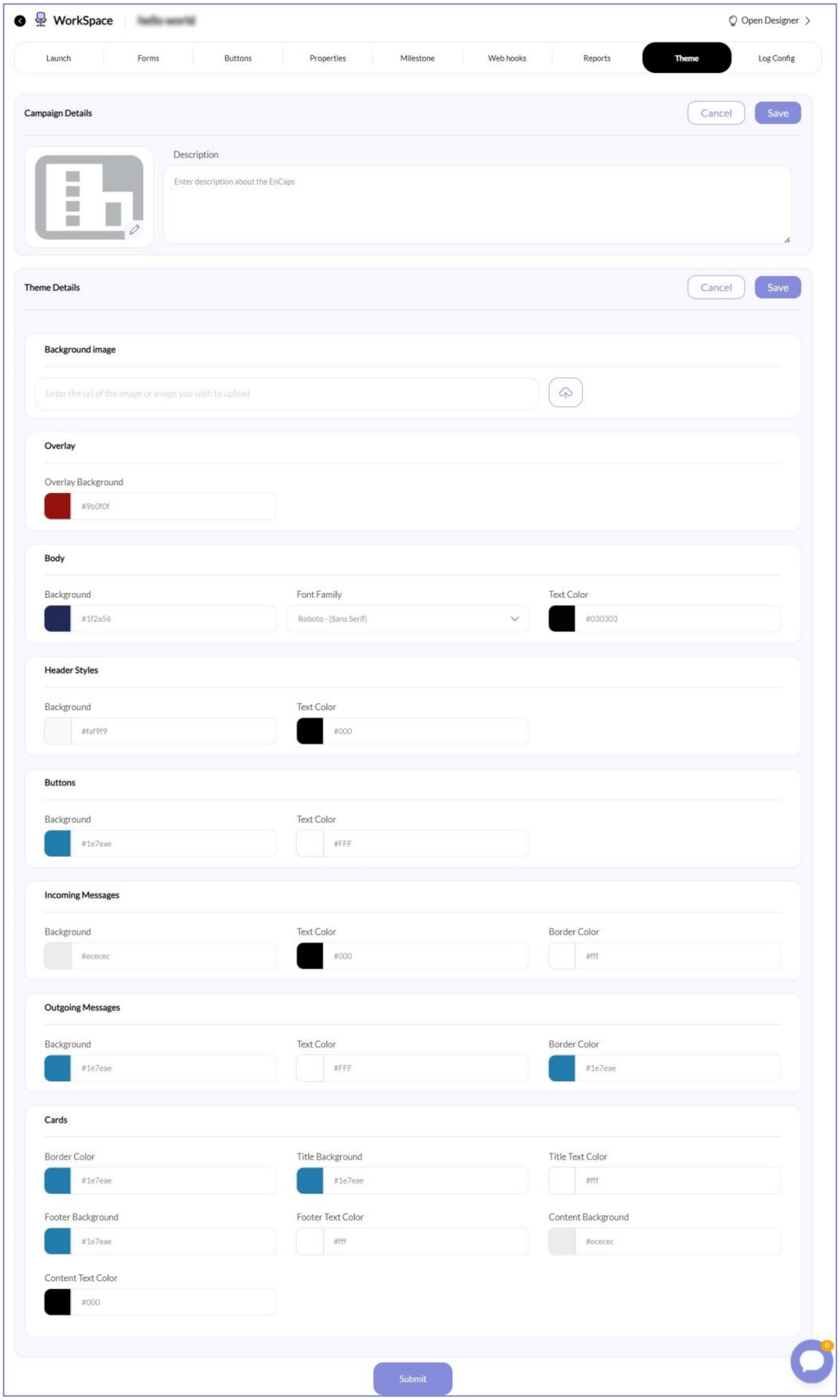


- Tap **Milestone Report** and select the milestone name from the drop down list and click the time period (1 Day, 7 Days, 15 Days, or 1 Month). The total milestone visits are displayed in the Single Column Bar chart as shown below.



EnCap Theme

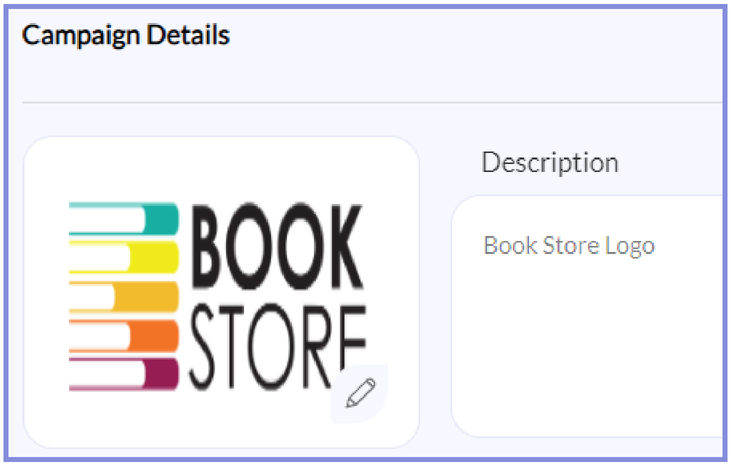
Want to apply a unique theme to your EnCap or to make EnCap theme blend with your website? **EnCap Theme** feature in Twixor EnCaps enables you to use custom themes.


WorkSpace
Open Designer
Launch
Forms
Buttons
Properties
Milestone
Web hooks
Reports
Theme
Log Config
Campaign Details
Cancel
Save
Description
Enter description about the EnCaps
Theme Details
Cancel
Save
Background image
Enter the url of the image or image you wish to upload
Overlay
Overlay Background
#9b0f0f
Body
Background
#1f2a56
Font Family
Roboto - (Sans Serif)
Text Color
#030303
Header Styles
Background
#faf9f9
Text Color
#000
Buttons
Background
#1e7eae
Text Color
#FFF
Incoming Messages
Background
#ececec
Text Color
#000
Border Color
#fff
Outgoing Messages
Background
#1e7eae
Text Color
#FFF
Border Color
#1e7eae
Cards
Border Color
#1e7eae
Title Background
#1e7eae
Title Text Color
#fff
Footer Background
#1e7eae
Footer Text Color
#fff
Content Background
#ececec
Content Text Color
#000
Submit

The figure shown above displays the default theme applied to the EnCaps. You can apply a theme to add color, background image, and style to your EnCap as given in the steps below:

Campaign Details

In this section, you can set the well-designed logo for the EnCap to promote your brand.

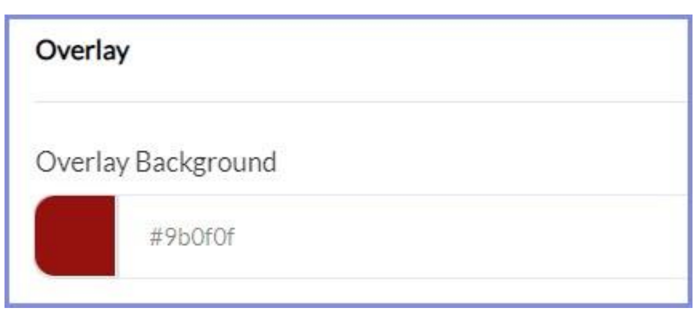


Background Image

- Select the image to be displayed at the background of the EnCap by clicking **Upload Image** in the **Background Image** section.

Overlay

- Apply background color to the EnCap outer layer using **Overlay Background** option in **Overlay** section.

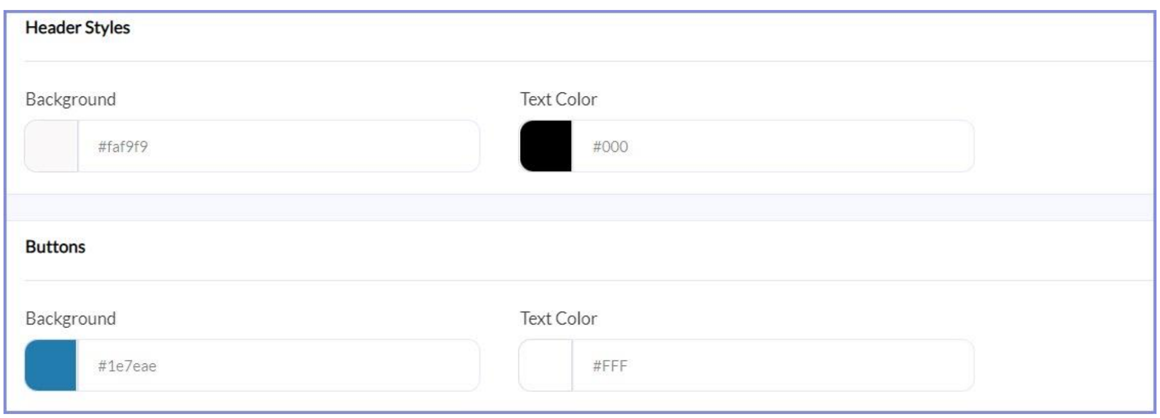


Customizing EnCap Content

- Choose your custom background color, font, and text color for the EnCap body from the **Body** section.
- Google Fonts have minimum load time. You can use the 10 best Sans serif and serif **Google Fonts** listed below for your EnCap:
    - Roboto
    - Open Sans
    - Lato
    - Montserrat
    - Source Sans Pro
    - Merriweather
    - Roboto
    - Playfair Display
    - PT Serif
    - Lora

Header Styles and Buttons

- You can select the background and text color for header and buttons from **Header Styles** and **Buttons** section.

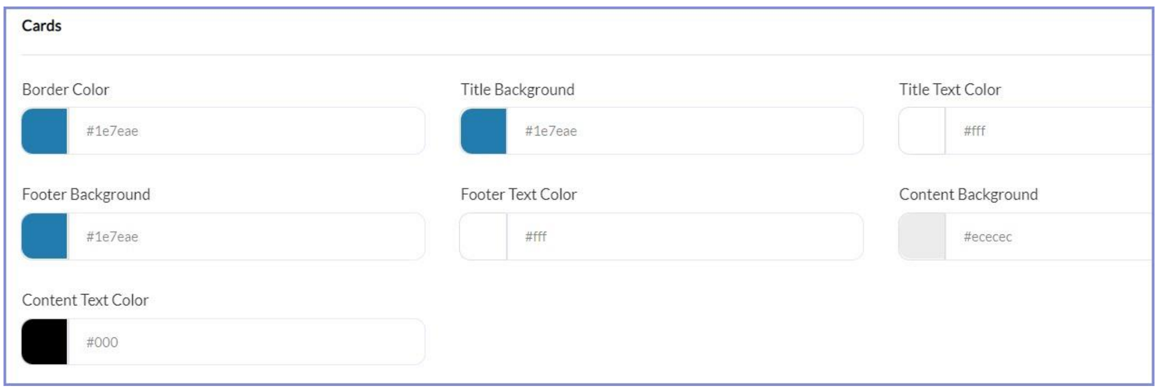


Incoming and Outgoing Messages

- You can also apply background, message text, and Border color for incoming and outgoing messages from **Incoming Messages** and **Outgoing Messages** section.

Cards

You can also customize the border, title, footer, and content of the carousel you use in EnCap.



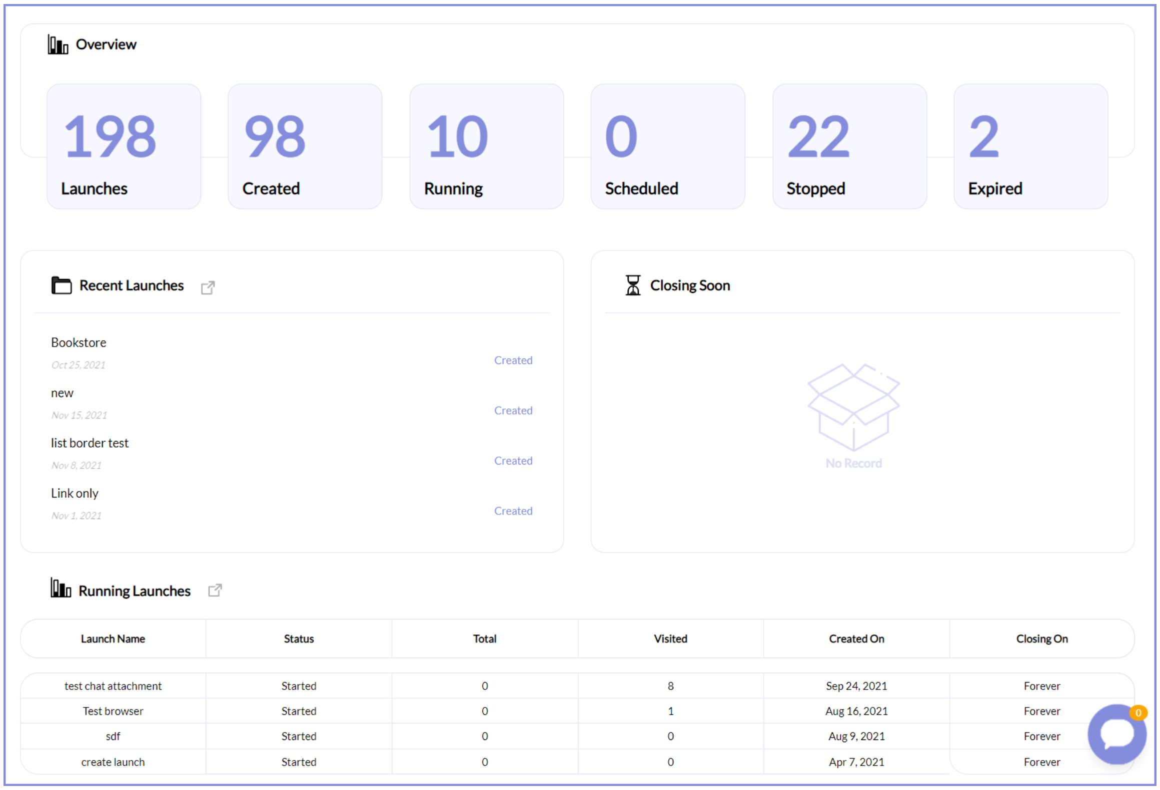
The theme selection will take effect immediately once you apply your custom theme to the EnCap. Bookstore EnCap after applying the custom theme is shown below:

You can view the final Book Store Encap launch after applying the theme in **Launch Configuration** guide.

EnCaps Dashboard

Twixor EnCaps integrates an awesome real time dashboard to monitor EnCaps and its launches and this can be viewed by any user registered with the business.

Navigation: Encaps->Dashboard



EnCaps Dashboard Components

The components of a dashboard, when viewed together, give a complete picture to the users about the EnCap they have launched. Below listed are the elements contained in Twixor EnCap's Dashboard.

Overview

This section displays the total count of the launched, expired, running, stopped, scheduled, and, created EnCaps.

198

Launches **:** Total number of EnCaps launched

2

Expired : Total number of terminated EnCaps

10

Running : Total number of currently running EnCaps

22

Stopped : Total number of closed EnCaps

1

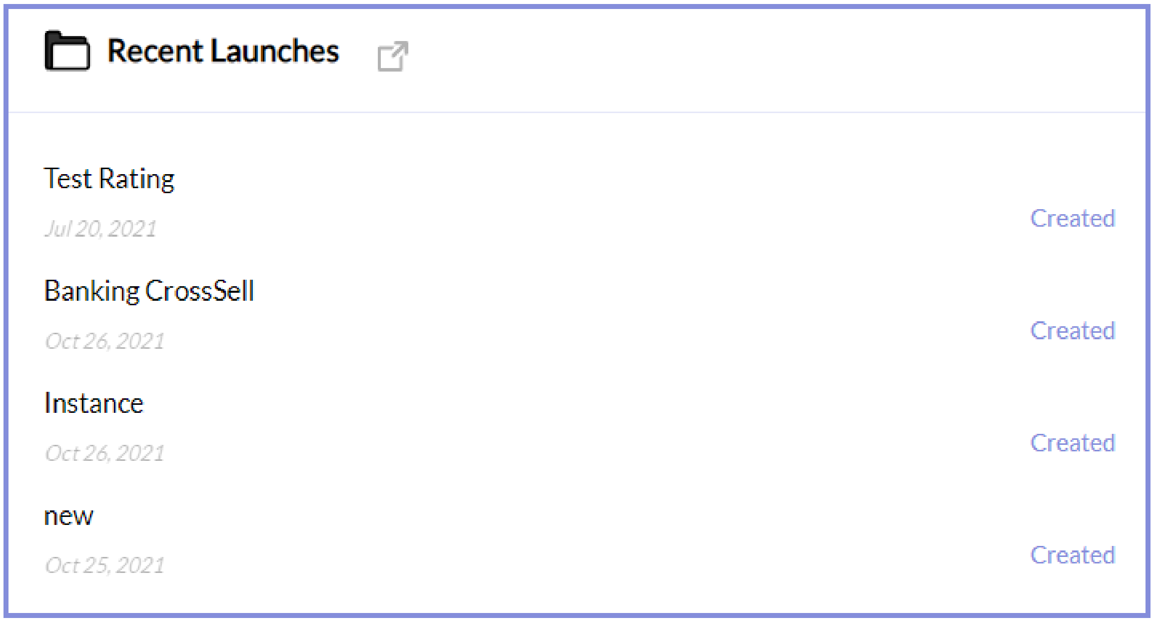
Scheduled : Total number of EnCaps scheduled on a specific date

98

Created : Total number of created EnCaps

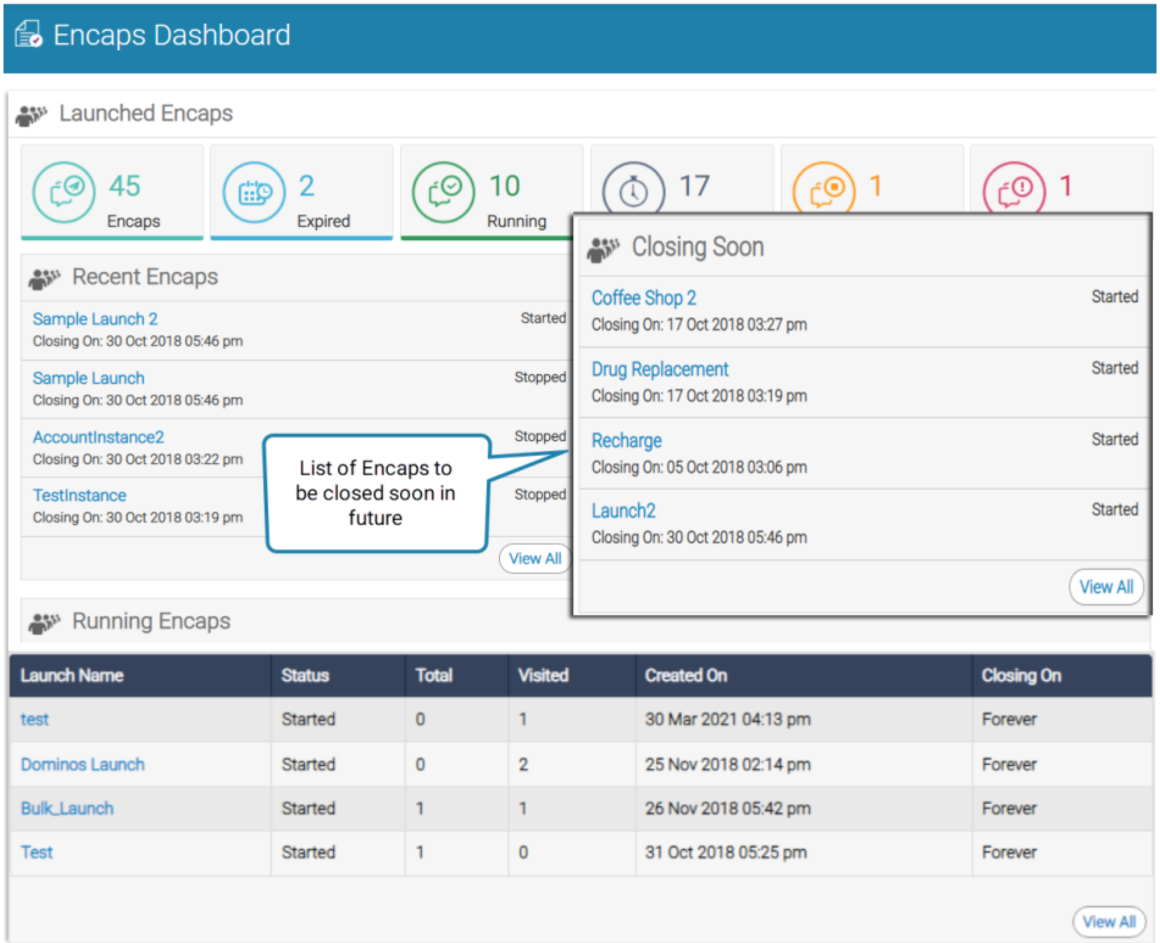
Recent Launches

Displays the list of EnCaps that are recently created and closed. Click to view the entire list of recently created EnCaps and their status.



Closing Soon

This section shows the list of EnCaps that will be terminated within 7 to 14 days. Clicking displays the entire list of EnCaps that will be closed soon.



Running Launches

Running Launches shows the list of EnCaps that are currently active.

Running Launches

Launch Name	Status	Total	Visited	Created On	Closing On
test chat attachment	Started	0	7	Sep 24, 2021	Forever
Test browser	Started	0	1	Aug 16, 2021	Forever
sdf	Started	0	0	Aug 9, 2021	Forever
create launch	Started	0	0	Apr 7, 2021	Forever

Running Launches section contains the following details:

Launch Name - Name of the EnCap launch

Status - Current status of the EnCap launch

Total - Total number of EnCap messages sent

Visited - Number of visited users

Created On - Date on which the EnCaps has been created

Closing On - Closing date of the EnCaps.

Filter the Launches based on Name and Type

Follow the steps below to filter the launches based on its name and type.

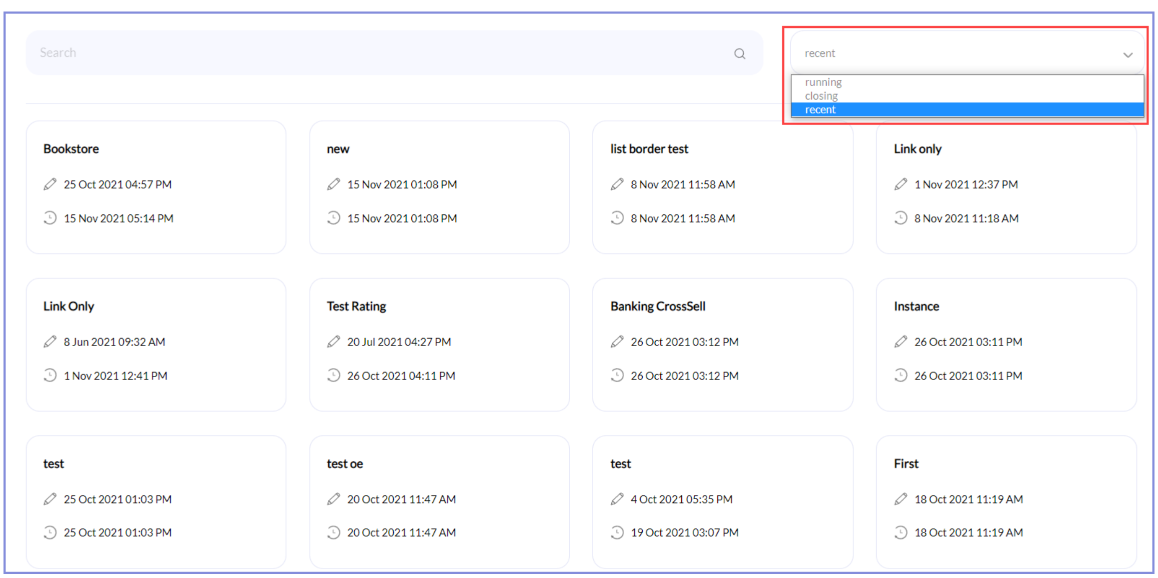
Search the Launch based on its Name

Click button in Recent Launches, Closing Soon, or Running EnCaps to view the respective list of all recently launched, to be terminated, or current running launches.

Key in the name of the EnCap launch in **Search by name** to explore it based on its name.

Filter the launch based on its Type

You can also filter the EnCap launches depending on its type (Recent, Closing, Running).



Transform the Customer Journey with WhatsApp

WhatsApp is undoubtedly one of the most popular messaging apps globally with over 1.5 billion users. Its journey to quick global adoption is due to its non-intrusive, non-ad, and entirely personal nature. With the addition of end-to-end encryption, business messaging is as secure as it gets with WhatsApp Business API.

WhatsApp Business API empowers businesses to communicate with their customers through automated and personalized transactional messages once users have "opted in" to receive messages. Similarly, customers can also initiate conversations with their preferred businesses using WhatsApp, for support related queries.

The real impact of WhatsApp Business API is on how fast, simple, reliable it can be when it comes to business to customer messaging. Businesses can now reach their customers on a channel that they know for sure is always being checked. This means businesses can now send high-value messages like flight tickets, boarding passes, order confirmations, price drop, and stock alerts directly to a user’s WhatsApp chat.

The primary benefit of using WhatsApp business is enhanced customer service through world's most preferred messaging app.

Use cases

So how can WhatsApp Business API help your brand? A number of companies have already implemented WhatsApp Business to reach out to their customers successfully.

WhatsApp Business offers you a versatile channel for sending any type of business messages. Due to its features, it can be apt for any business that craves to offer a higher-speed channel and share the valuable information frequently to their customers.

Let us suggest some ideas that make sense to incorporate WhatsApp as a channel in your mixture of marketing channels.

And the WhatsApp integration cannot be limited to these sectors alone. You can employ WhatsApp in any business provided that you have the requirement to send the creative and productive content to your customers.

1. **Finance** - Banks can use WhatsApp to send basic transaction alerts like POS transaction, ATM Cash withdrawals, etc. In addition to this, they can also avail services like Bank account opening, mini statement, checking account balance, and updating the Aadhar details through WhatsApp.

2. **Tourism** - User can be informed about special holiday packages and travel campaigns through WhatsApp. They can also be given crisis communication suggestions, travel advice, and an invitation to attend the events.

3. **Healthcare** - WhatsApp implementation in healthcare can be useful in aiding clinical communication, enhancing patient care, and improving learning while preserving the patient's privacy.

4. **Real-Estate** - The real-estate brokers can do a live chat with the buyers and send reminders for asset related queries.

5. **Media** - Generally, in media sector be it a radio station or TV broadcaster, there is always new content that needs to be delivered to the individuals without any delay.

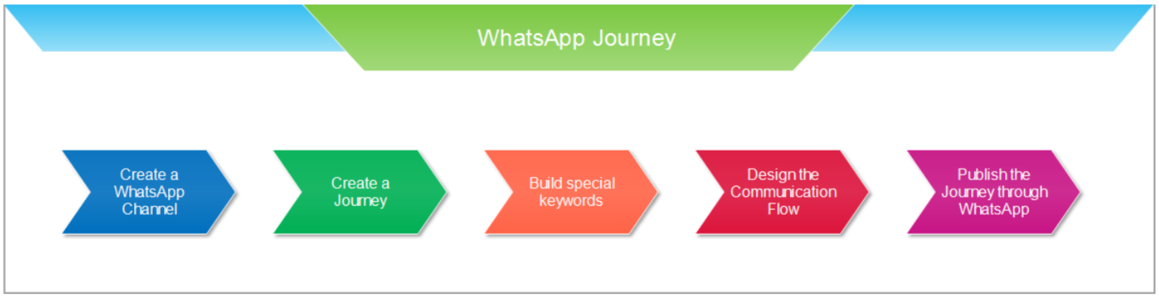
6. **E-Commerce** - Product marketing campaigns, Current offers, and Product discounts can be directly sent to the customers smartphone via WhatsApp.

7. **Sports and Events** - Services like live tickets, match information, and results can be offered to the sports fans.

You can offer the above-mentioned services across different sectors by creating a WhatsApp Journey in Twixor EnCaps.

Getting Started with WhatsApp Journey

Have you just started to create the WhatsApp Journey? Don't be puzzled. The links available in this section illustrate the steps to create the WhatsApp journey.



Create a WhatsApp Journey

In Twixor EnCaps, we offer the WhatsApp integration to seamlessly engage the customers through smart and keyword aware messaging.

Set the ball rolling by building frictionless conversational messaging experiences using Twixor EnCaps **WhatApp Journey**.

Easily create the WhatsApp journey using **Keyword Builder** and **Flow Designer**.

To begin with, create a new WhatsApp journey using the below steps.

Navigation : Journey -> Select **Journeys**

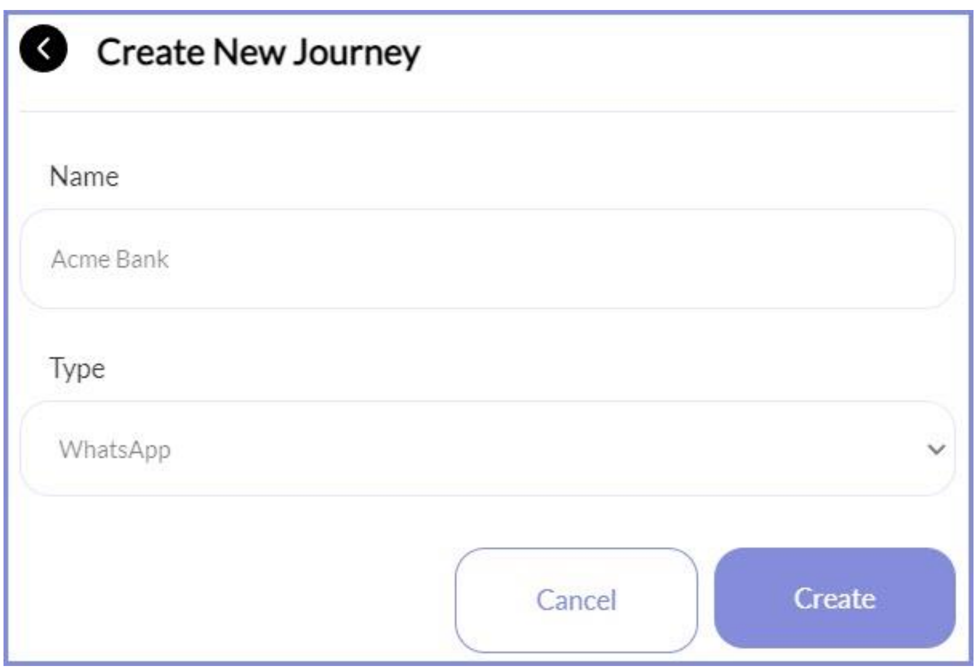
1. Head to **Journey** and you will find the list of created WhatsApp journeys in this page.

2. Click **New Journey -> Create** button to create a new WhatsApp journey.

3. Give a unique **Name** related to the journey. For your understanding, let us take a use case of Acme Bank. So, give the **Journey Name** as **Acme Bank**.

4. Select the type of channel from the list of available channels (WhatsApp and Telegram) to create different forms of journeys.

Info! WhatsApp Journey is available in the most recent version of Twixor EnCaps



The user will be able to view the WhatsApp messages (created using Twixor EnCaps WhatsApp journey) as a choreographed bot. That is, the bot can converse with the user through **keywords**. Let's create these keywords using **Keyword Builder**.

Import/Export WhatsApp Journey

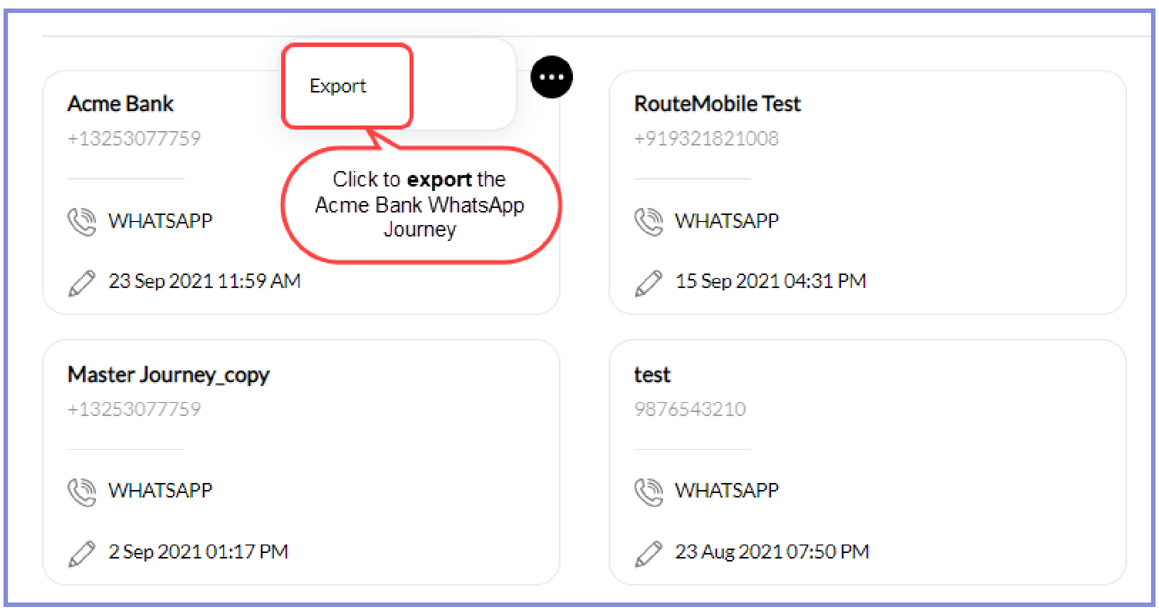
Twixor has an import/export wizard that makes it easy to import WhatsApp journey from a ZIP file.

Export the WhatsApp Journey from Twixor

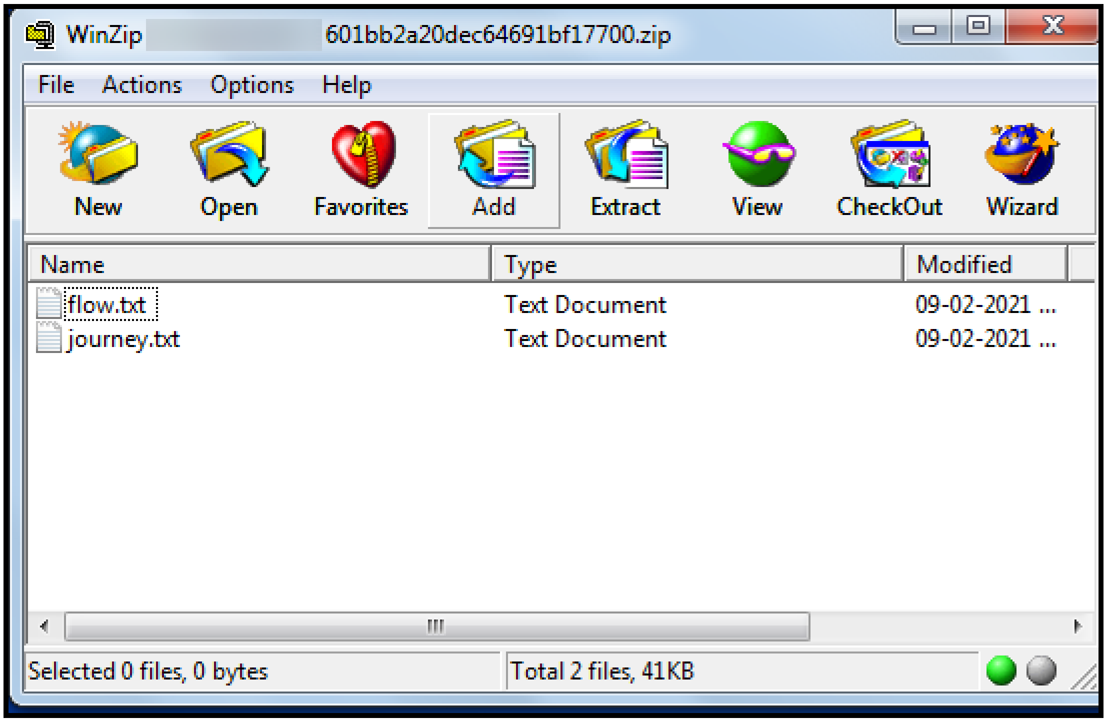
You can export your WhatsApp journey to the text file formats. Since the WhatsApp journey backup generates a .zip file, they can be accessed on any device, as long as you have an application capable of accessing them. This allows you to reuse the WhatsApp journey.

How to export the WhatsApp journey

- Navigate to **Journey** main menu and select **Journeys**.
- Click export button under ⋯ icon next to the WhatsApp journey you wish to export.



- You'll view the WhatsApp journey exported to the .zip file containing flow and journey JSON files.

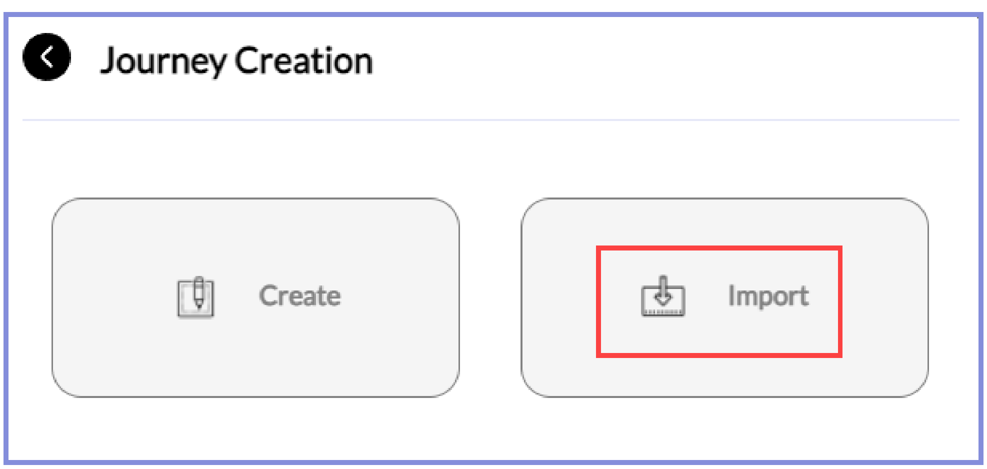


Import WhatsApp Journey to Twixor

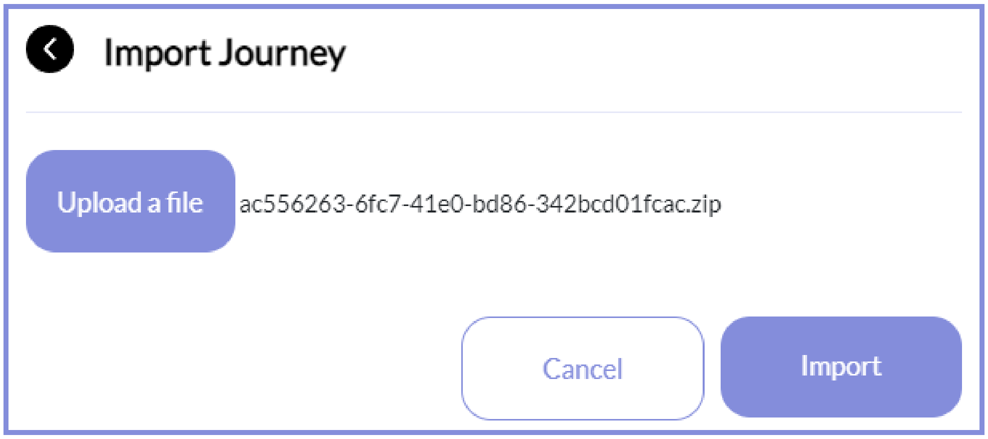
Import your WhatsApp journeys from your WhatsApp journey exports to quickly get started with a WhatsApp journey in Twixor.

How to import WhatsApp Journey

- Navigate to **Journey** menu and select **Journeys**.
- Click **New Journey->Import**button to to import the WhatsApp Journey.



- Click **Upload a file**, choose the exported **Zip file** you wish to import, and then click**Import**.


Import Journey
Upload a file
ac556263-6fc7-41e0-bd86-342bcd01fcac.zip
Cancel
Import

Keyword Builder

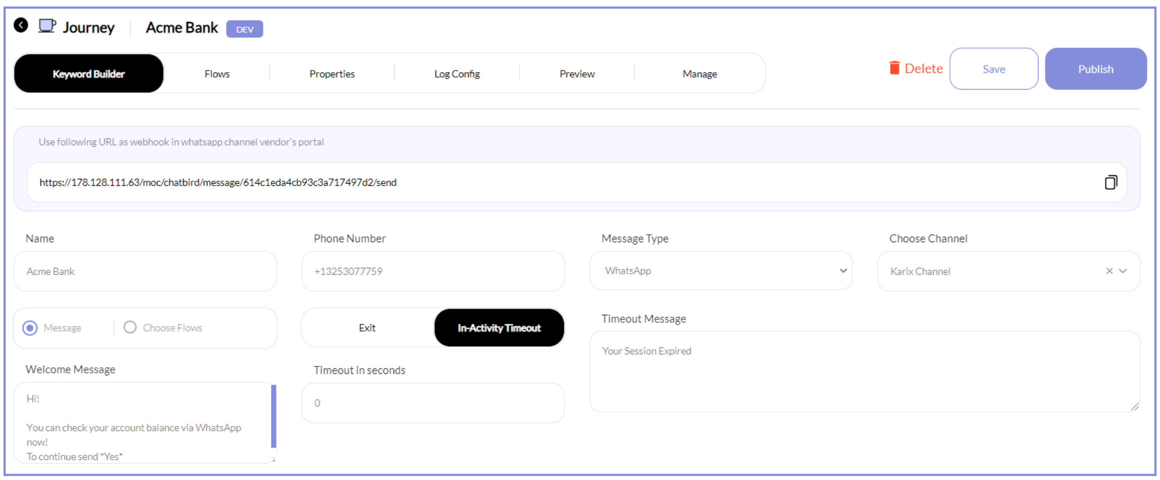
Click the journey to direct into **Keyword Builder** page after you have created the WhatsApp Journey.

The customer can use the keywords defined by you to get the required information from the enterprise.

Here you can create special keywords to associate it with the designed work-flow of the required process.

1. **Name,Phone Number and Message Type**given during the creation of WhatsApp Journey will be reflected in this page.

2. Choose the WhatsApp channel created by you from **Choose Channel**. Refer **Create WhatsApp Channel** to form new WhatsApp channels.



3. Writing a welcoming note offers a friendly exchange between you and your customer. So, enter a heart-warming message here or You can choose the flow which you are already created.

4. Enter interval of the **In-ActivityTimeout** period in seconds.

5. Enter a **Time Out message** that should be displayed when the session is timed out.

Add a Keyword

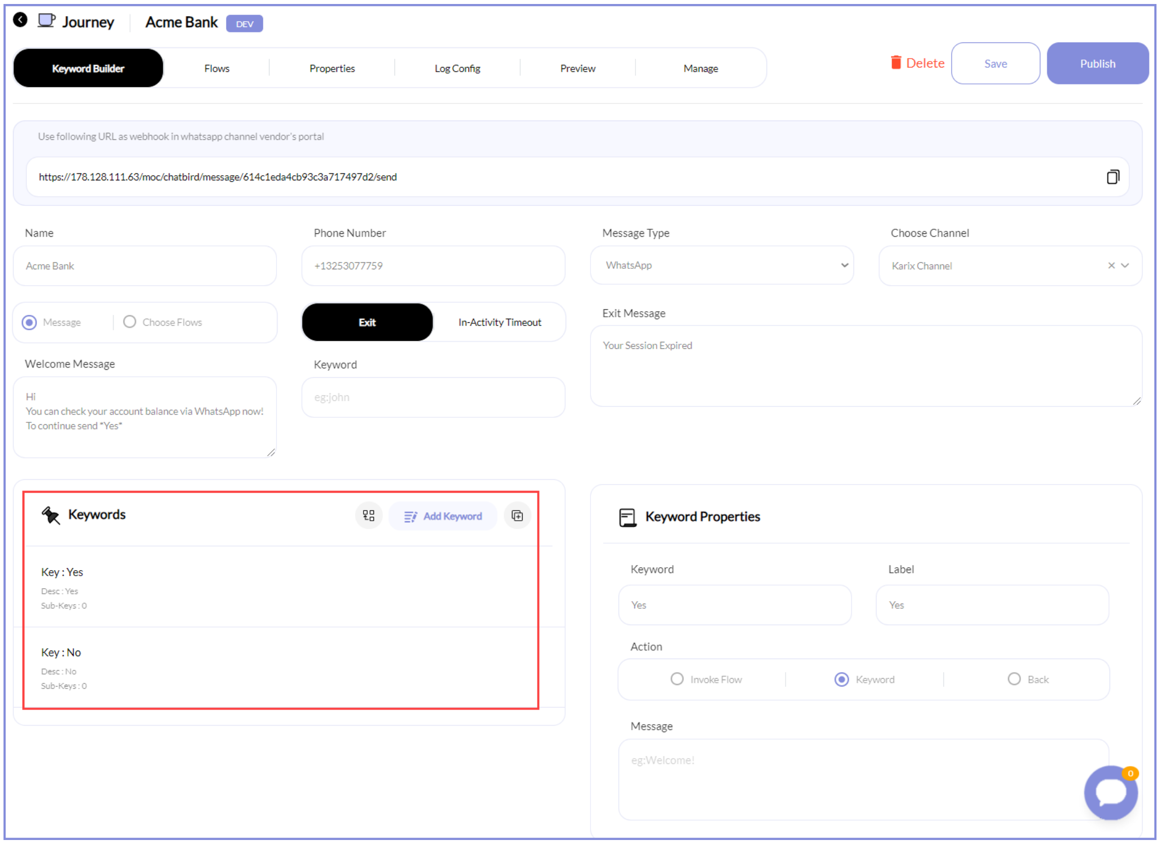
1. Click 

to add a predefined keyword.

2. To insert a child keyword, select the main keyword to add the sub-keywords for it and click.

Info! This **Add Child** option will be enabled when the keyword type is selected as a Keyword.

3. Click icon next to the created keyword to delete the keyword.



Assign the properties for the Keywords

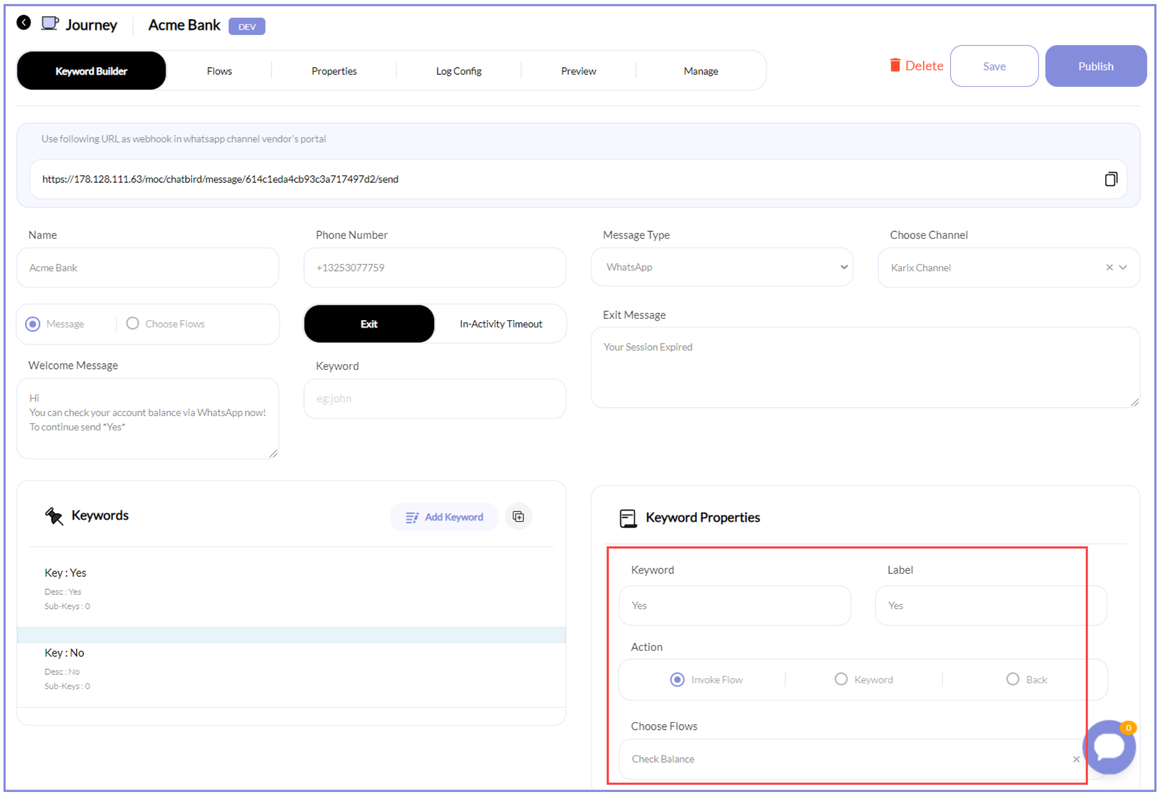
Here the keywords can be mapped with the associated flow. Refer **next topic** to design the WhatsApp journey flows.

1. Give a short name for the keyword. In our example **check account balance journey**, create the keywords **Yes** (to denote Proceed) and **No** (to skip balance check).

2. Provide a description for the keyword in **Label**.

3. Select the **type of keyword** (Workflow or Keyword).

4. If the selected **action** is a **Invoke Flow**, select the associated workflow that you have crafted using **Workflow Designer**.



5. If the **action** is a **Keyword**, enter the message that should be displayed when this keyword is called by the user. You can create child keywords for this main keyword 'No' as we described in **Add a Keyword** section.

For example, if the user sends the text **"No"**, the user is asked if they wish to access other services like **Account Opening** and **Update Aadhar details**. So create sub keywords AO (Account Opening) and UAD (Update Aadhar Details) for the **"No"**keyword.

> **Info!** Don't forget to click the **Save** button to save the configurations

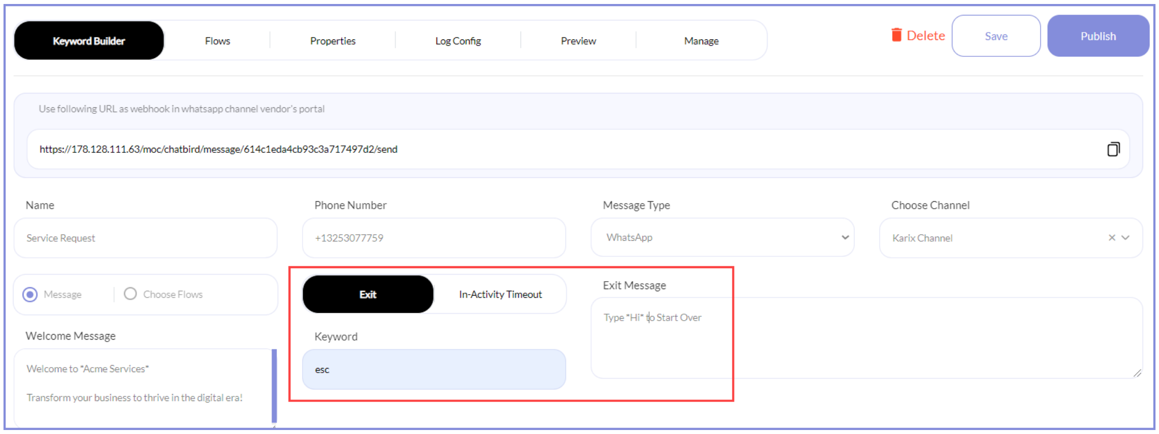
Exit the WhatsApp Journey

When the customers are done with the WhatsApp conversation, they can exit from the conversational flow. For instance, if the service requested by the customer to get details of the cards from the bank or to address their queries is availed by the bank, they can close the WhatsApp conversation by keying in the **custom keyword** defined here.

To do so,

- Select your WhatsApp journey and tap **Keyword Builder** tab.
- Click **Exit** option, and enter the custom keyword (e.g. esc) to end the chat.

• Enter the message to be displayed after the chat is closed. For example, banks can ask customers to look for other services like Account balance, mini statement, pre-approved loans, etc after the availing the service request they asked for.

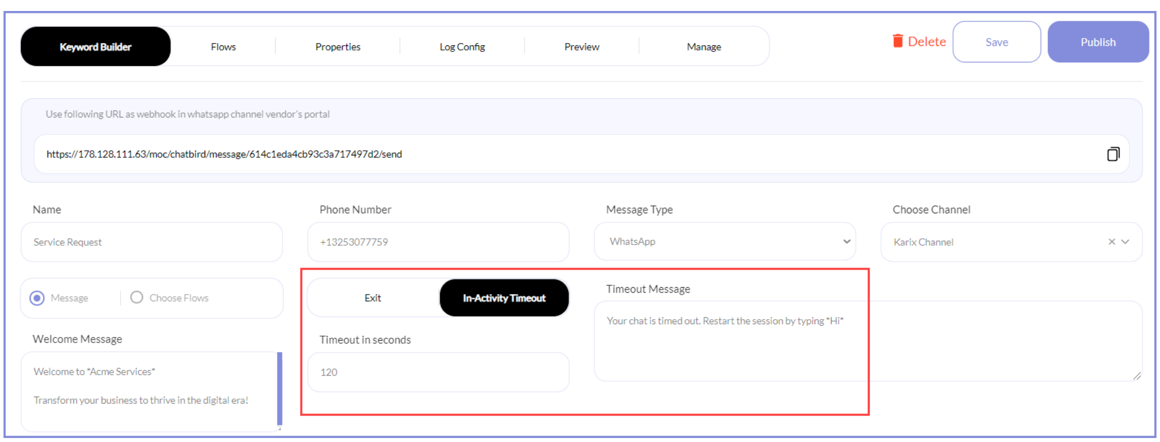


Configure Chat Inactivity

Use inactivity timeouts to configure the **timeout** (in seconds) when the agent do not respond to the customer within the predefined time and the timeout **message** when the chat is closed after the preset timeout period.

• Navigate to your WhatsApp journey and click the **Keyword Builder** tab.

• Click the **Inactivity Timeout** tab and enter the **timeout** in seconds and the timeout message. For example, you can ask the agents to restart the chat session using the timeout message after the inactivity timeout.

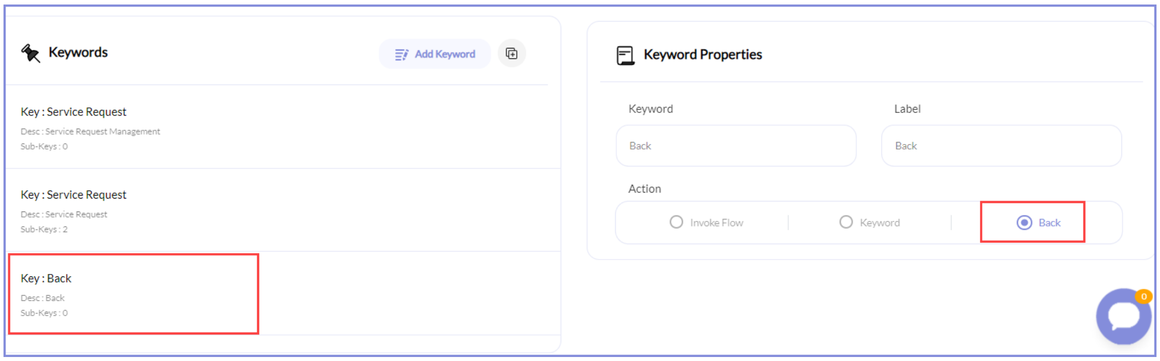


Back action for a keyword in WhatsApp Journey

The purpose of the "Back" action on the WhatsApp journey helps you to navigate to the previously visited message or flow.

To add a Back action for a keyword,

- Head to the WhatsApp journey and go to the Keyword section at the bottom of the page.
- Select the keyword to which you want to assign the **Back** action.
- Enter the **Keyword** and **Label** for the back action.
- Choose the **Action Type** as **Back**.



- The back keyword will bring the user to the last message or flow they visited.

Communication Flow Designer

In this context, communication flow designer is a visual canvas that works and looks like a flowchart which allows you to configure the flow of messages on WhatsApp (using keywords, messages, and decisions) between the enterprise and customers.

You can now make WhatsApp journeys within a matter of seconds by using our **drag-and-drop flow designer** and now communicate with users on WhatsApp.

Generally, it requires more time and effort to create a communication flow by using complicated programming language. But it can now be designed and initiated effortlessly using Twixor EnCaps Journey Builder.

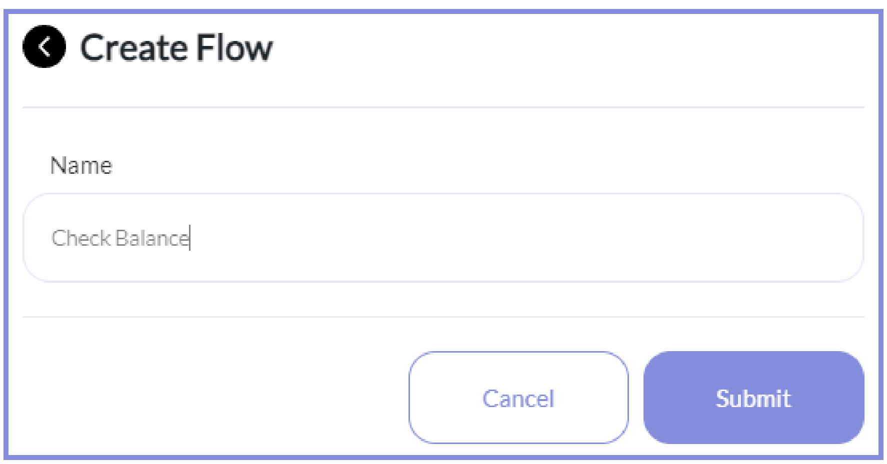
After creating the keywords, click the **Flows** tab to design the communication workflow.

Create a Flow

To begin with, create a flow using these steps:

1. To create a new communication flow for your WhatsApp journey, click **Create Flows** button.

2. Enter a **Name** related to the flow and click **Submit**.



Add the Variables

Before you begin designing the communication flow and using them in messaging nodes, you would first need to add variables.

1. To add a variable, Click **Add** option under Variable which is available to the right of the flow designer.

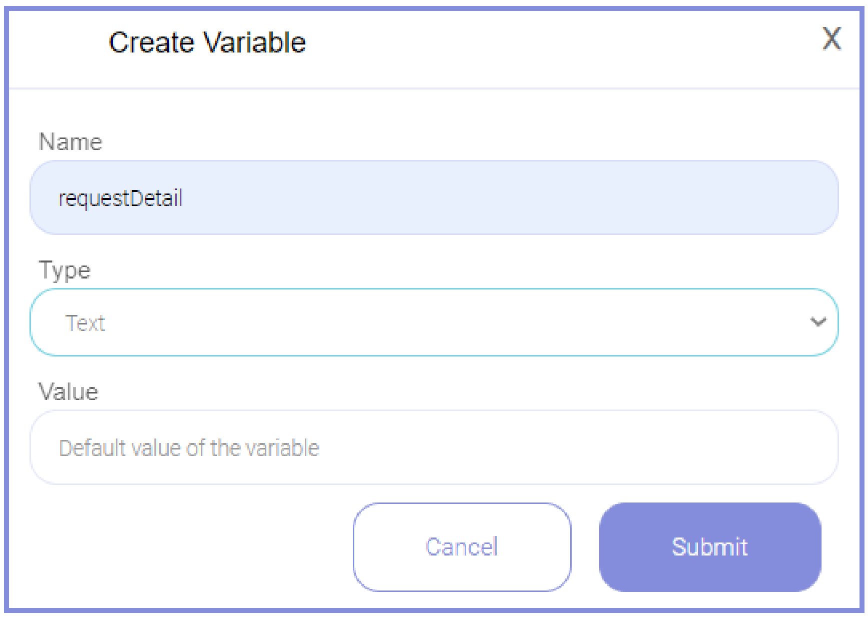
2. Give a **Name** for the variable.

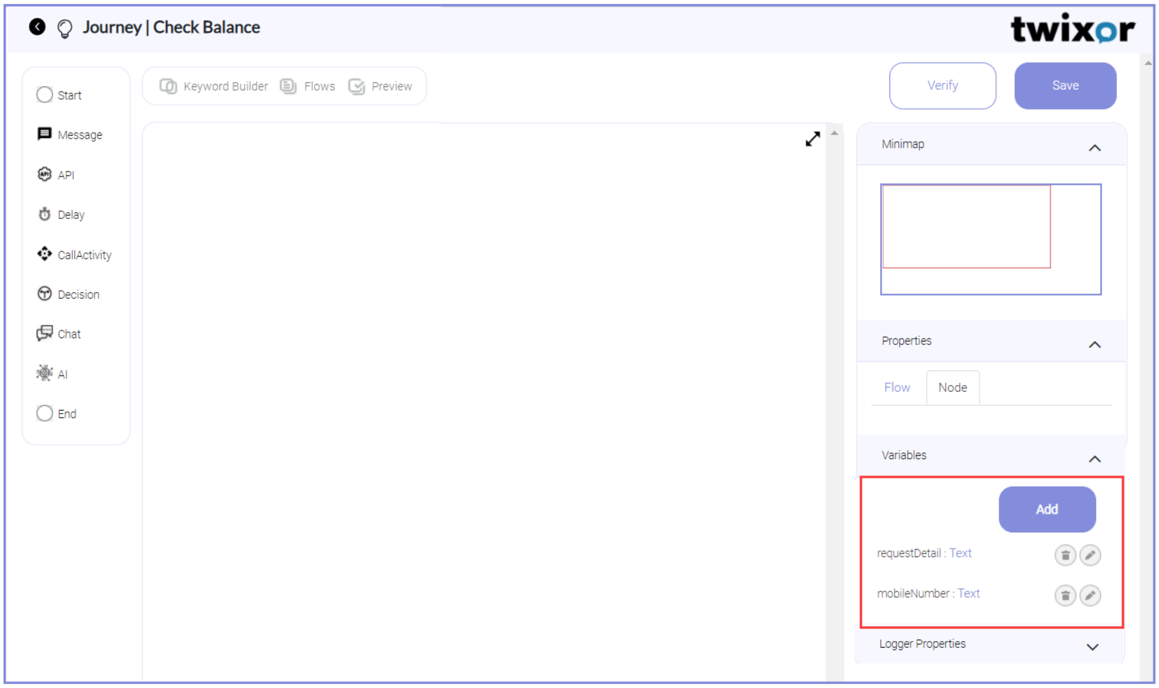
3. Select the **type** of the variable from the drop-down list (**Text, Number, Boolean, Media, Location**).

4. Then enter the **default value for the variable**, which is optional.

5. Finally, click **Submit** to add a variable.

6. In our example, let's create two variables namely **requestDetail** and **mobileNumber** of type text.





Minimap

Minimap located on the right pane of the communication flow designer gives a tiny snapshot of the entire communication flow.

Properties

You can define the **Flow** and **Node** properties here.

- Click **Flow** to change a name and give a brief description of the WorkFlow. You can also give a timeout period and timeout message for the entire workflow here.
- Enter a name for the **Node** by selecting the node and clicking the **Node** option.

Design the Flow

Now, let us start to design flow for the **Check Account Balance** Journey.

Step 1: To initiate the flow, drag and drop the **start node** from the palette.

Step 2: Drag and drop a message node  and click  to create an outgoing message.

You can share the image/ audio/ document/ location to the customers in WhatsApp to offer a more engaging experience to your customers.

Pursue the steps below to send the Text/Image/Video/Audio/Document/Location to the customers.

Step 2a: Create a plain text message

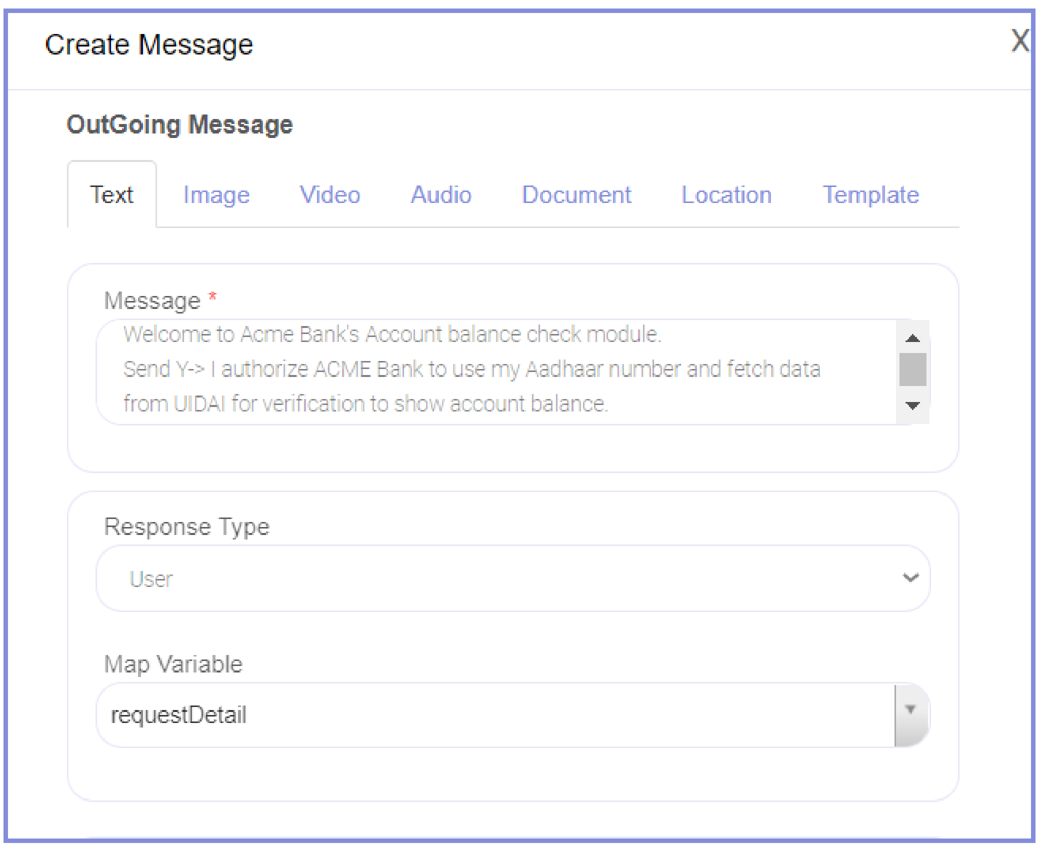
- Click the **Text** tab and enter the plain text message.

  In our example, we've given the text message to welcome the customer as:

  Welcome to Acme Bank's Account balance check module.

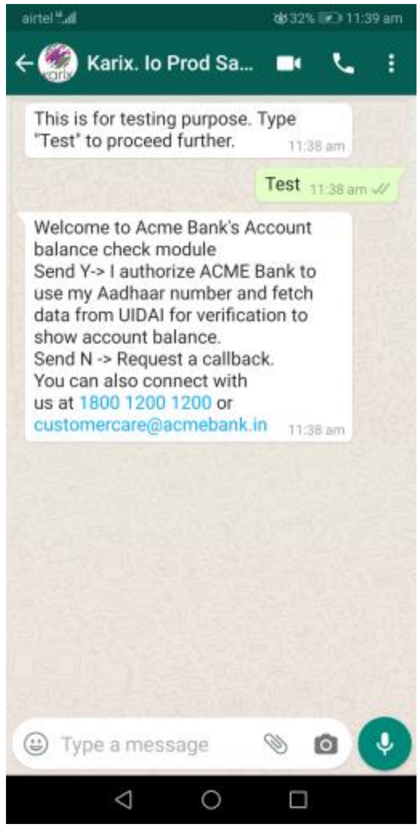
  Send Y-> I authorize ACME Bank to use my Aadhaar number and fetch data from UIDAI for verification to show account balance.

  Send N -> Request a callback. You can also connect with us at 1800 1200 1200 or customercare@acmebank.in



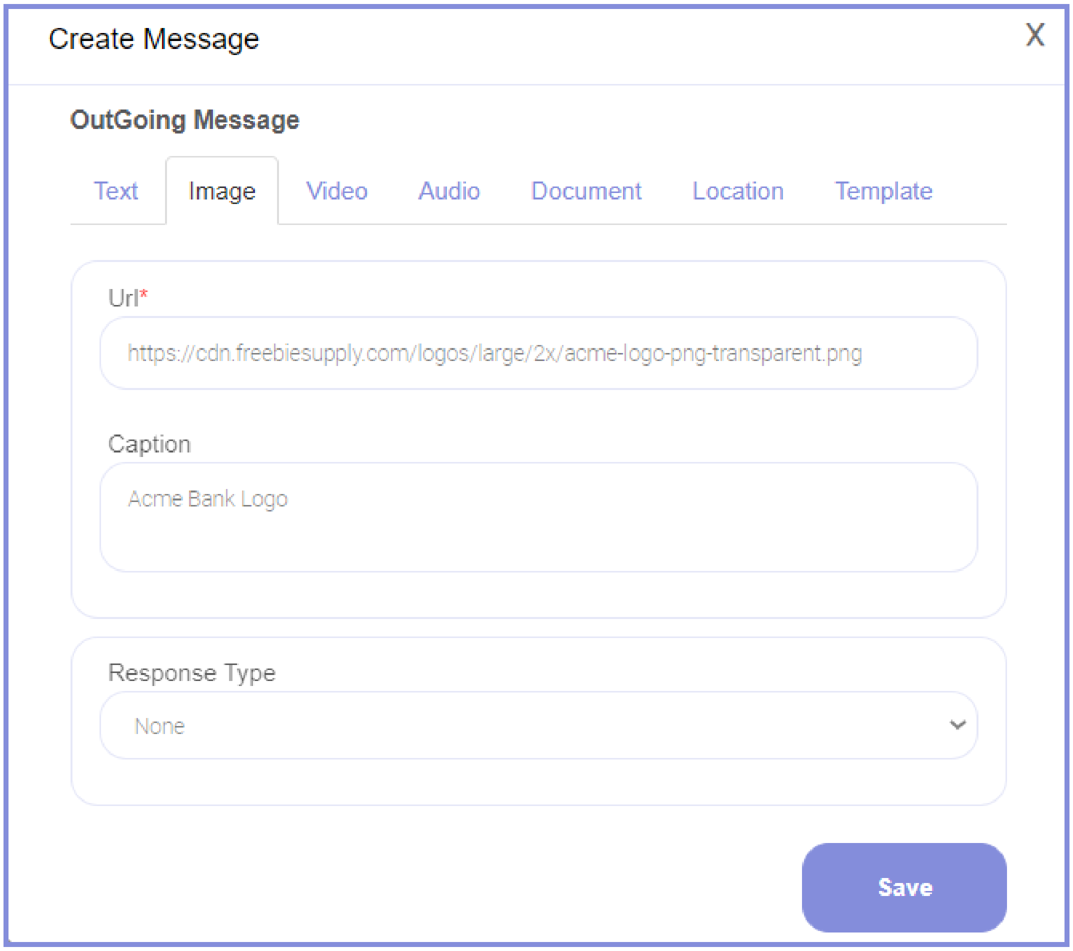
- Click **Save** and publish this journey.

After publishing the WhatsApp journey by following the steps in **Publish the WhatsApp Journey** guide, the message will be displayed as shown below:



Step 2b: Embed an image in the message

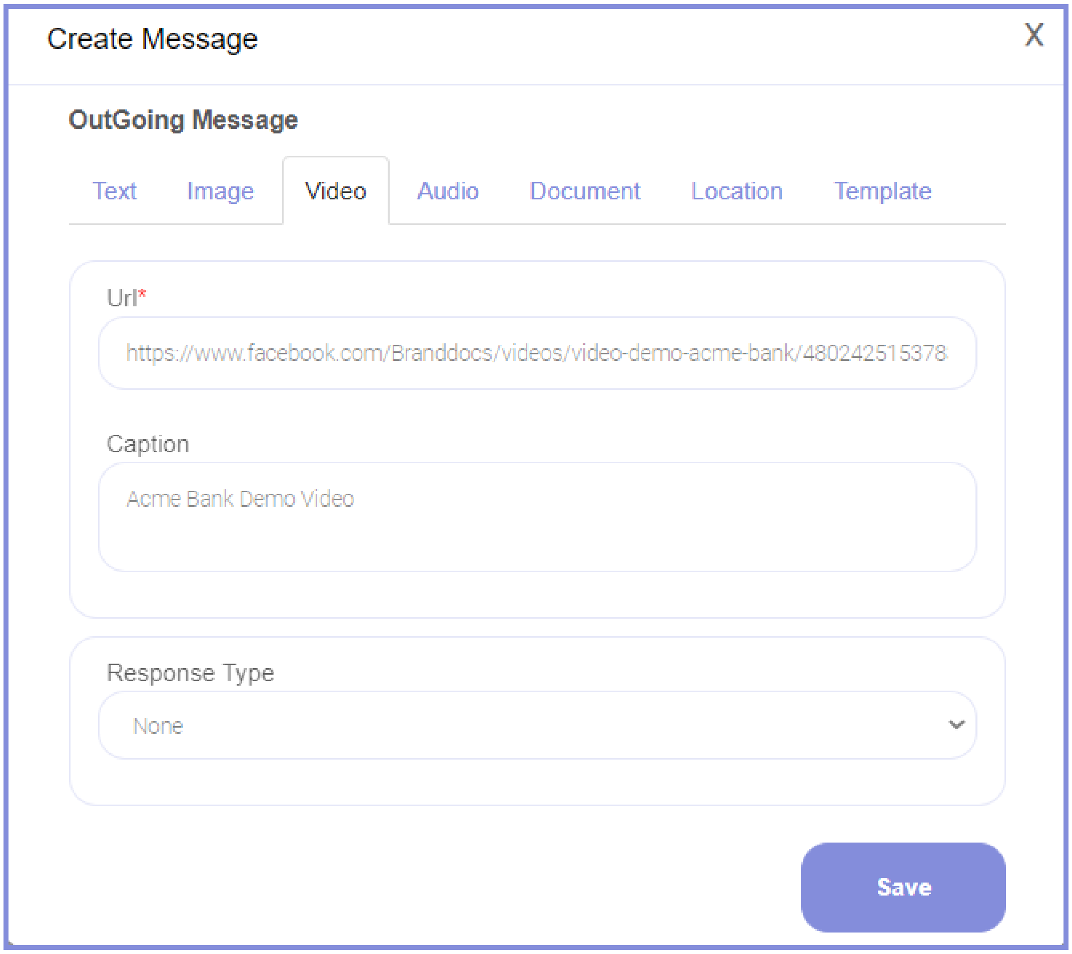
- Select **Image** tab and enter the image source URL to fetch the image from the web.
- Give a caption for the image and click **Save**.



After publishing the WhatsApp journey, the journey output will look like:

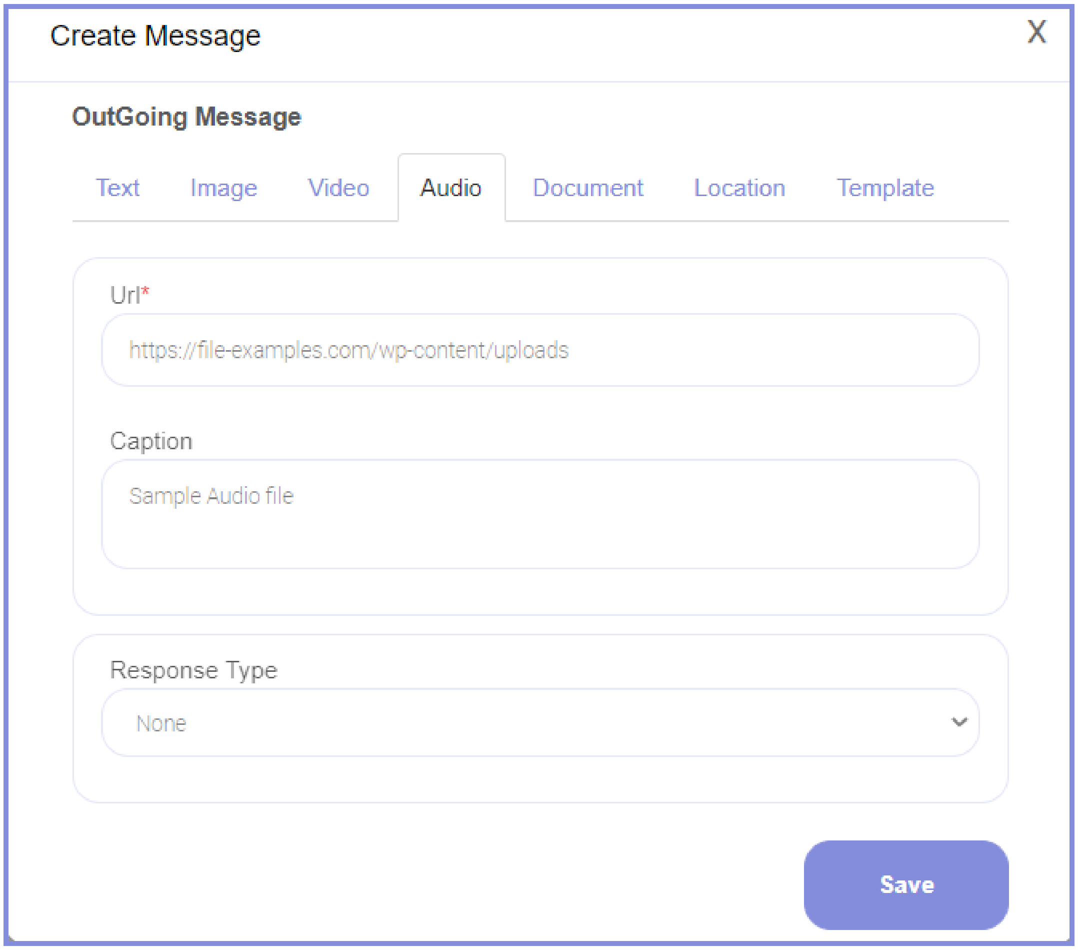
Step 2c: Embed a video in the message

- Select **Video** tab and enter the video source URL to fetch the video from the web.
- Give a caption for the video and click **Save**.



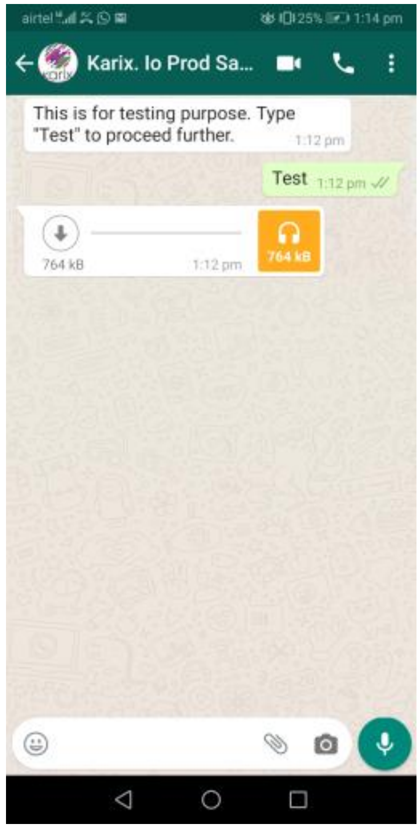
Step 2d: Send an audio file

- Click **Audio** tab and enter the **source URL** for the audio file.



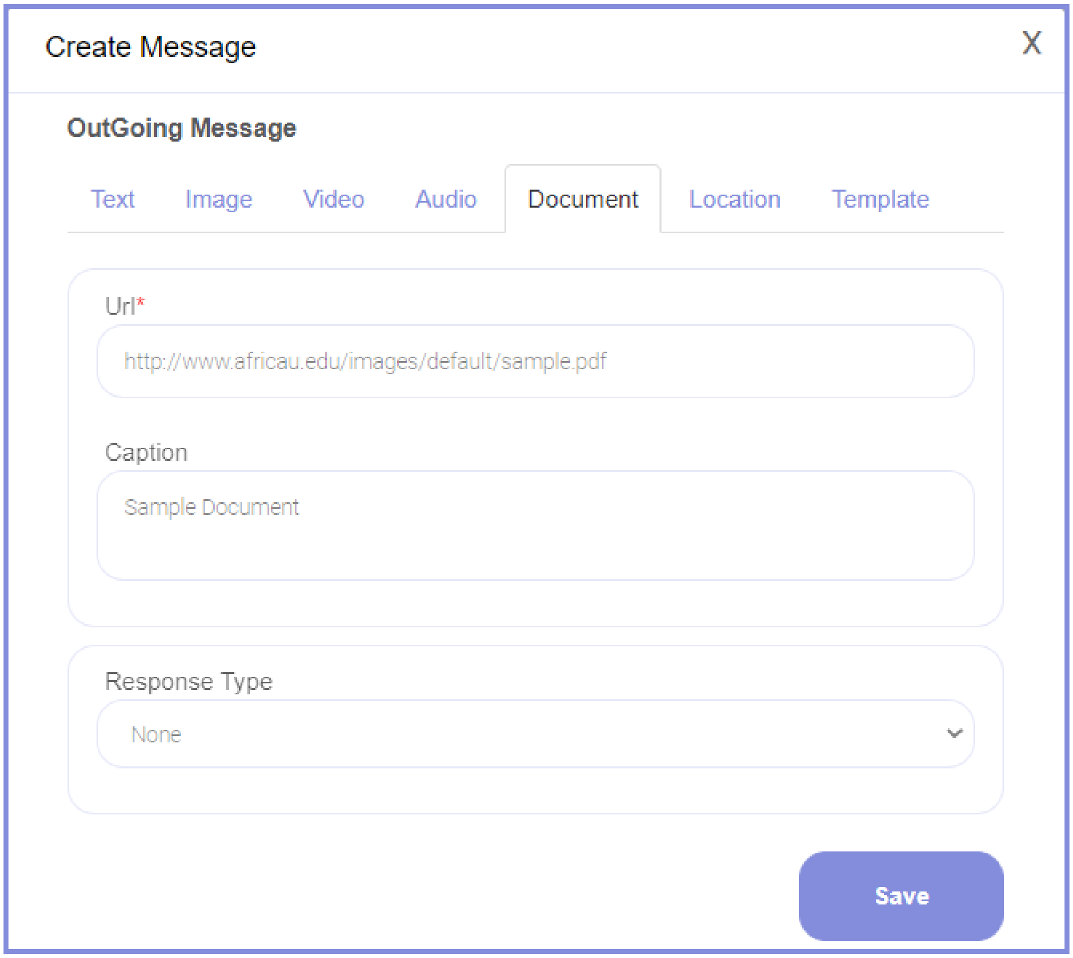
- Enter a **caption/title** to the audio and hit **Save**.

  If this journey is published, the audio file can be viewed and downloaded by the customer as shown below.

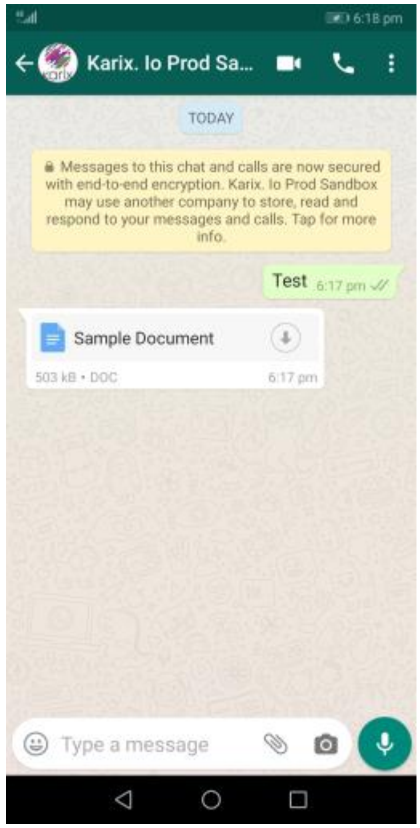


Step 2e: Send a document

- Click **Document** tab and enter the **source URL** for the document.

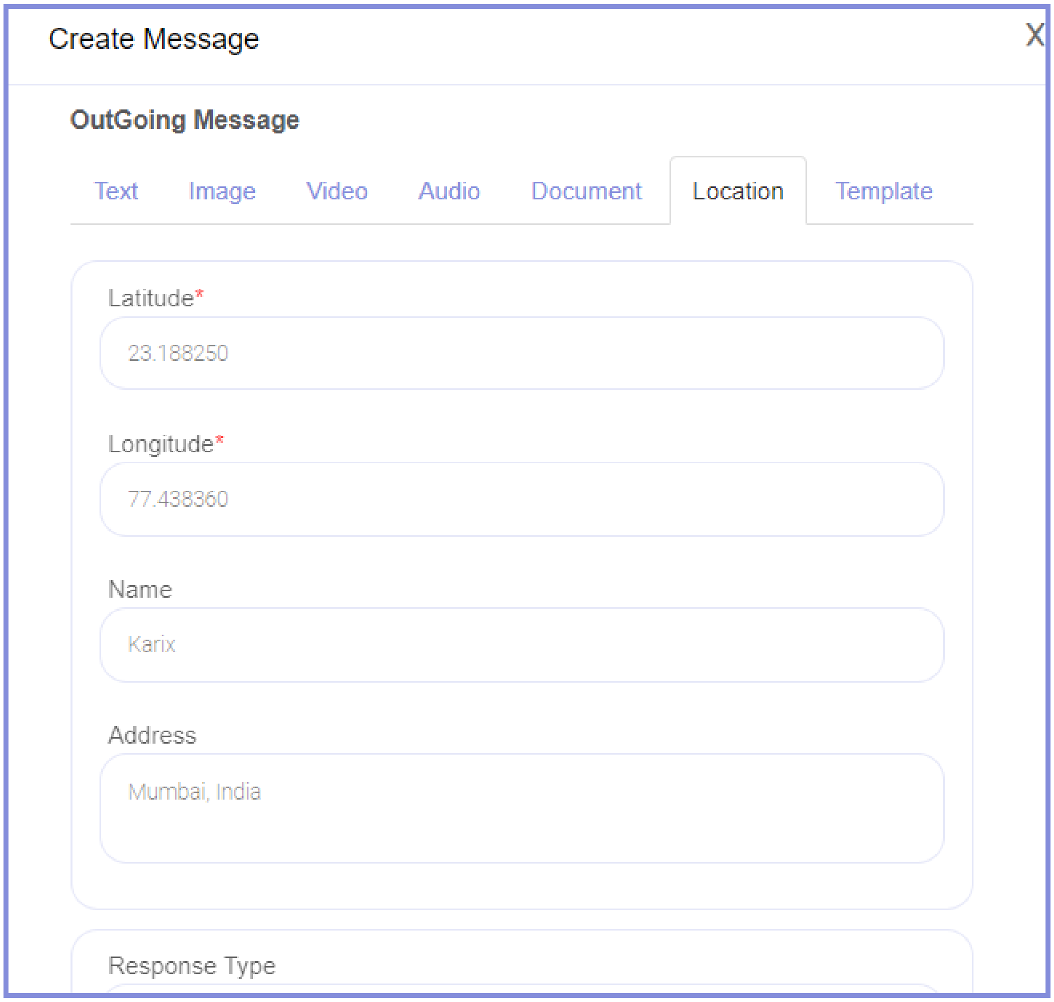


- Enter a **caption/title** to the document and click **Save**.



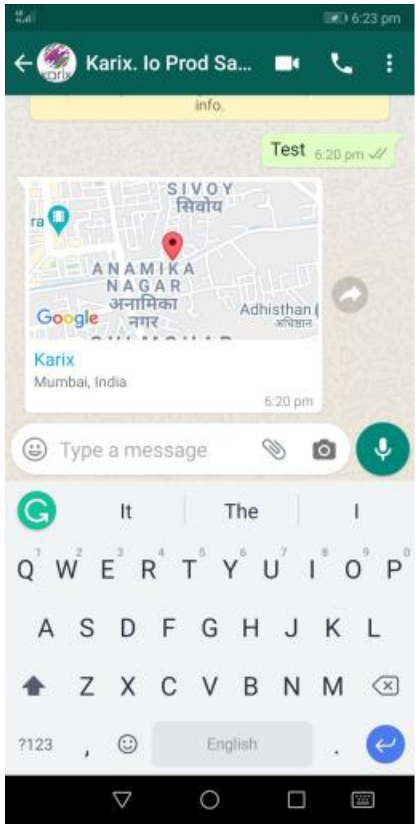
Step 2f: Share a location using Google Maps

- Click the **Location** tab and enter the source URL for the document.
- Enter the **latitude** and **longitude** details of the location.



- Type the name and address of the location to be shared.

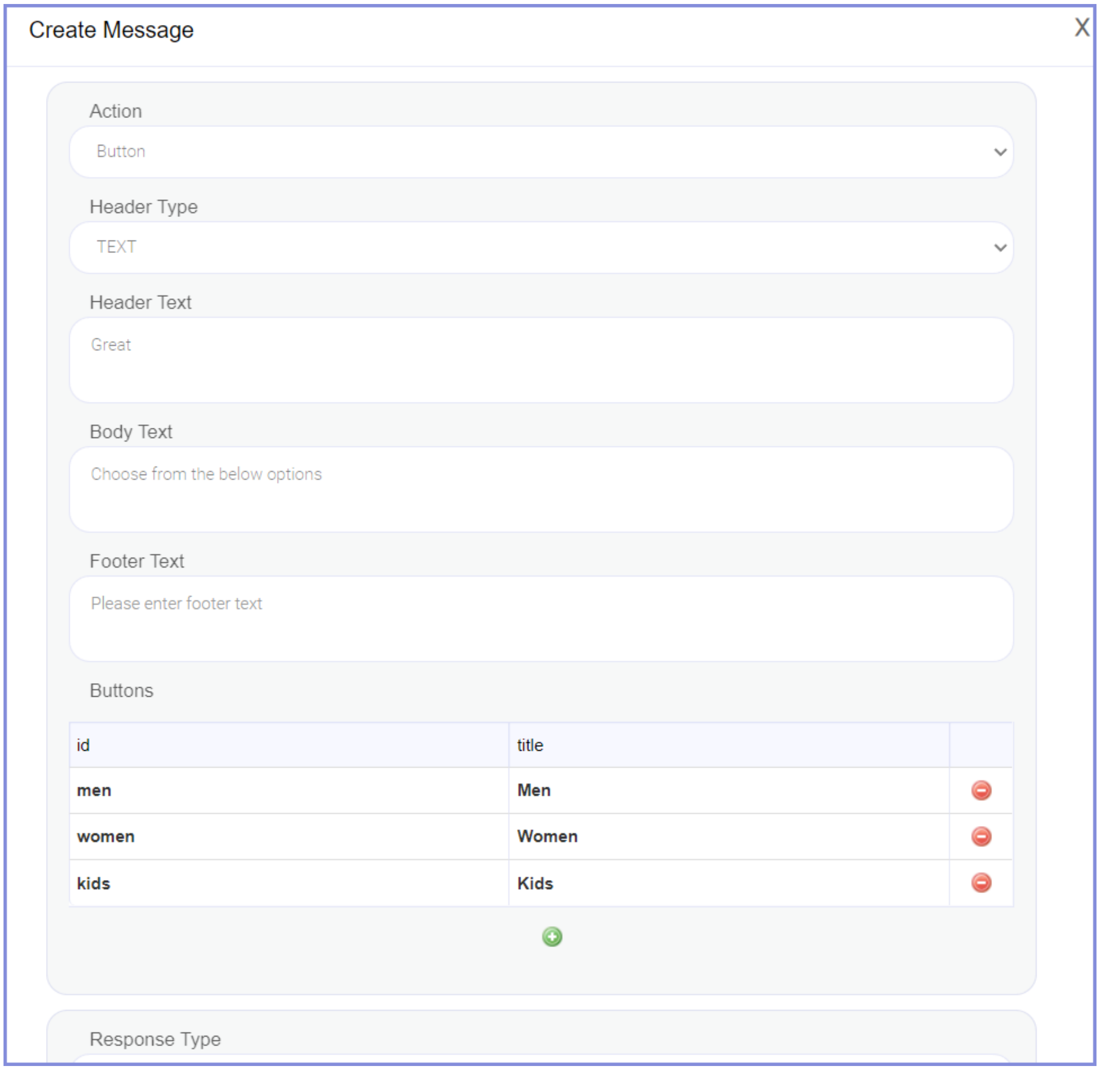
After publishing the journey with the location message, the output will look like:



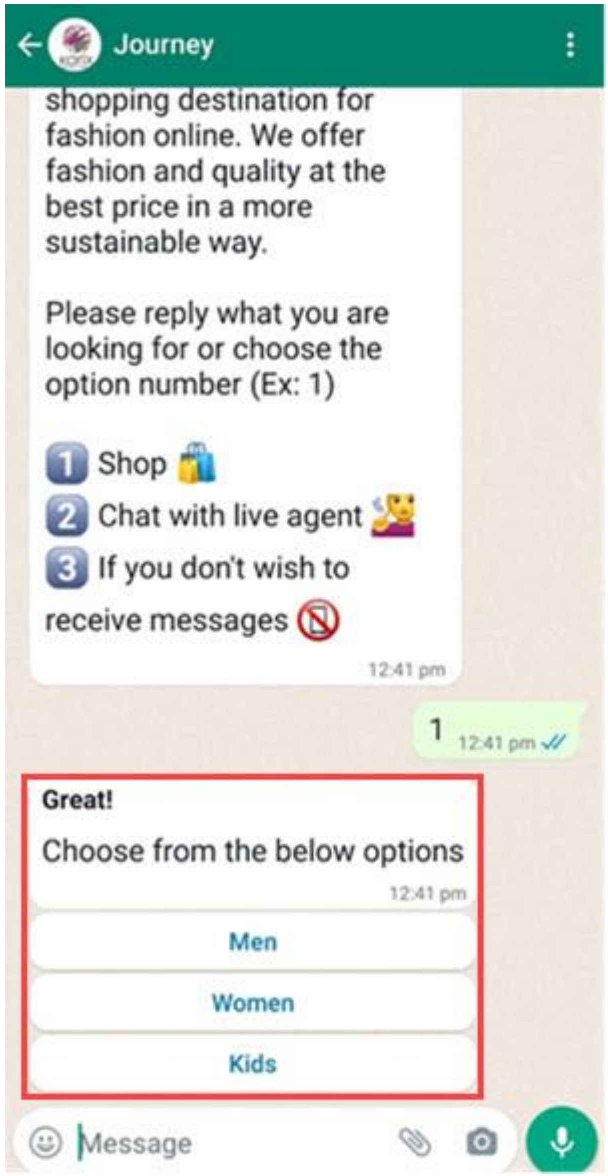
Step 2g: Send an Interactive Messages

For Button:

- Select the Action type as **Button**
- Choose the Header file type from the drop down.
- Add the title in header text to use as a header.
- Enter the body and footer text for the message to be displayed.
- Add the Button Id and title. In our example, let's create three buttons namely Men, Women and Kids.
- Click **Save** button to add the button.

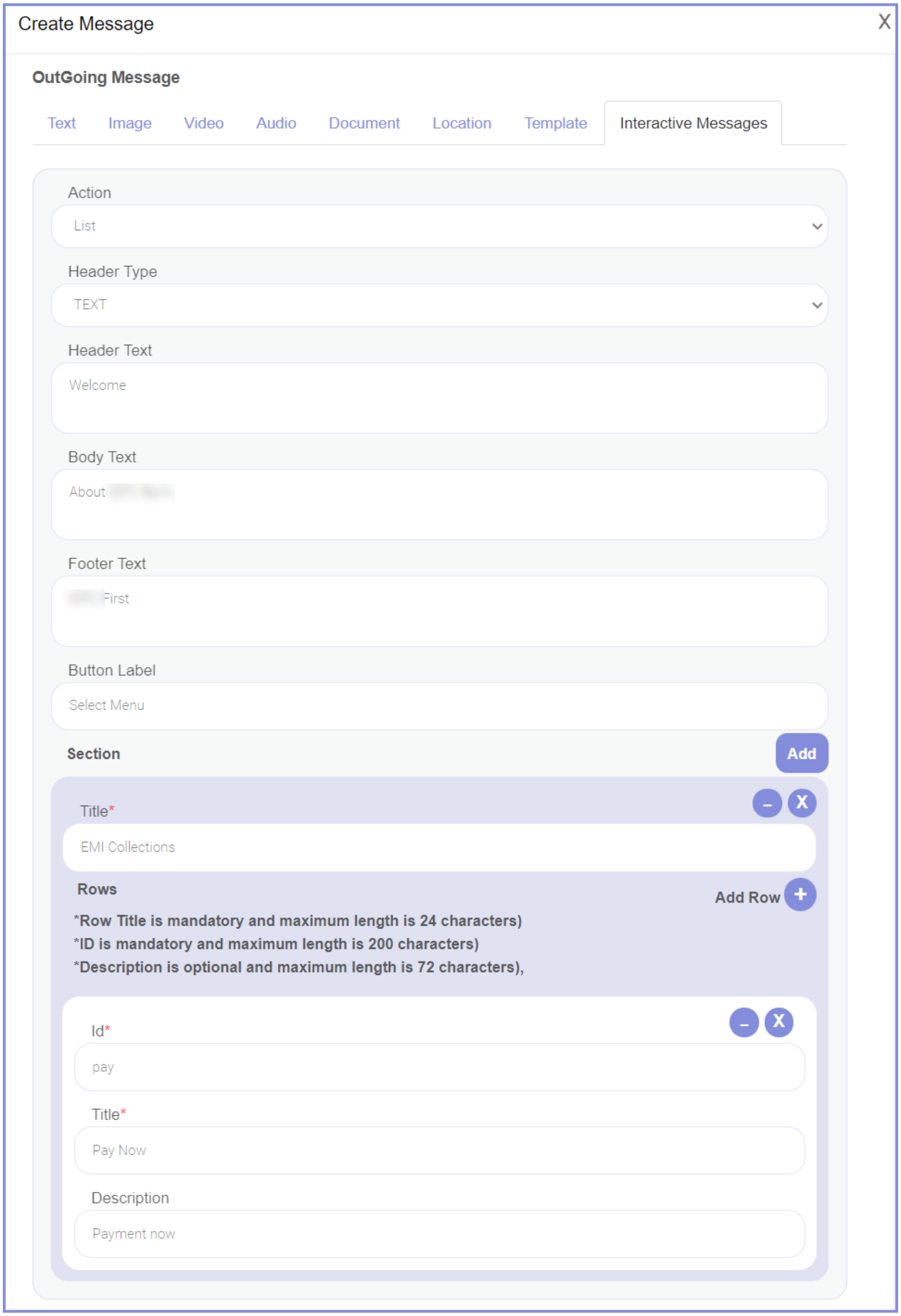


After publishing the journey with the interactive message with button type, the output will look like:

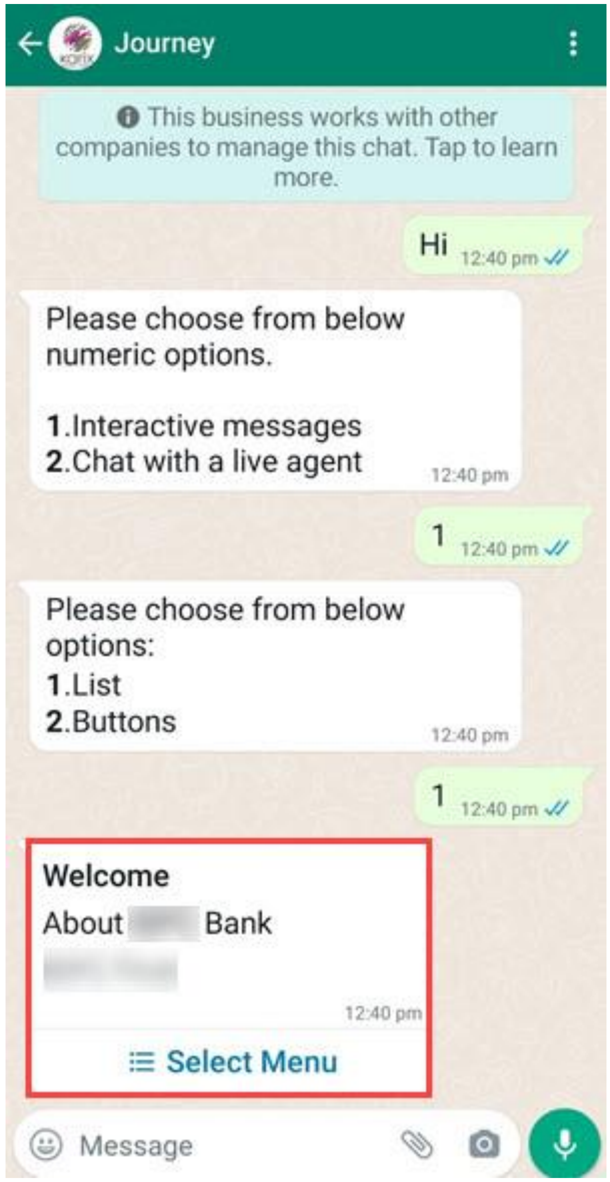


For List:

- Select the Action type as **List**
- By default, the Header file type will be selected as **Text**.
- Add the title in header text to use as a header.
- Enter the body and footer text for the message to be displayed.
- Add the label for the button. In our example, let’s create a button namely **Shop Here**.
- Click **Add** button to add the sections under the button.
- Lets create the first section title as Apparels. Click icon to add the number of list items under apparels like Mens, Womens and Kids.
- Click **Save** button.



After publishing the journey with the interactive message with list type, the output will look like:



Step 3: Select the **Response Type**.

User - Choose this option to get the response from the user. If you select this type, you'll be asked to map the associated variable. In this example, map the requestDetail variable.

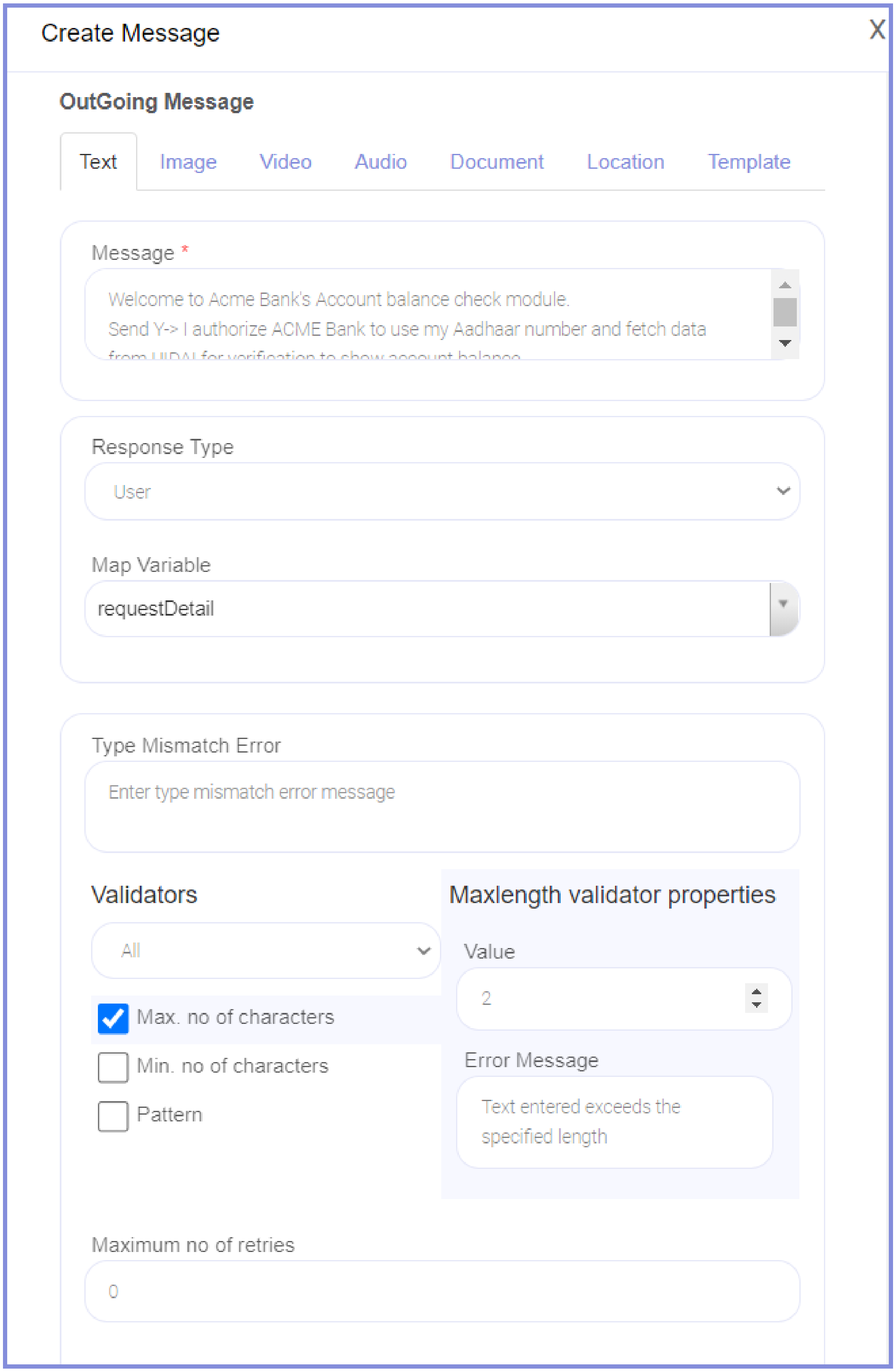
None - Select this type if none of the response is required for the message.

System - **System** to obtain the back-end response. Enter the timeout period (in seconds) to wait for the response from the system. And, enter the **Timeout error message** if the response is timed out.

In our example, select the response type as **User** since we get Yes(Y) or No(N) input from the user.

Step 4: Then choose the variable that should be mapped with the user response (Y or N). Map the **requestDetail** variable here.

Step 5: Enter the Type Mismatch error message.


Create Message
X
OutGoing Message
Text
Image
Video
Audio
Document
Location
Template
Message *
Welcome to Acme Bank's Account balance check module.
Send Y-> I authorize ACME Bank to use my Aadhaar number and fetch data
Response Type
User
Map Variable
requestDetail
Type Mismatch Error
Enter type mismatch error message
Validators
All
Max. no of characters
Min. no of characters
Pattern
Maxlength validator properties
Value
2
Error Message
Text entered exceeds the specified length
Maximum no of retries
0

Step 6: Choose the suitable **Validator** (**Max. no of characters**, **Min. no of characters**, or **Pattern**) that receives the input text from the user, verifies it against the selected validator, and returns an error message if it doesn't meet the given validation criteria.

Step 7: Click the respective validator to configure its properties.

- **Max. no of characters** - Give the maximum number of characters allowed in the user input in **Value**. Type the Error Message that should be displayed when the text exceeds the specified number of characters.

- **Min. no of characters** - Enter the Value to validate the minimum number of characters in the input.
- **Pattern** - Three types of pattern validation are available here.

Email: Can be used while obtaining the email id from the user.

URL: Used to check the valid URL.

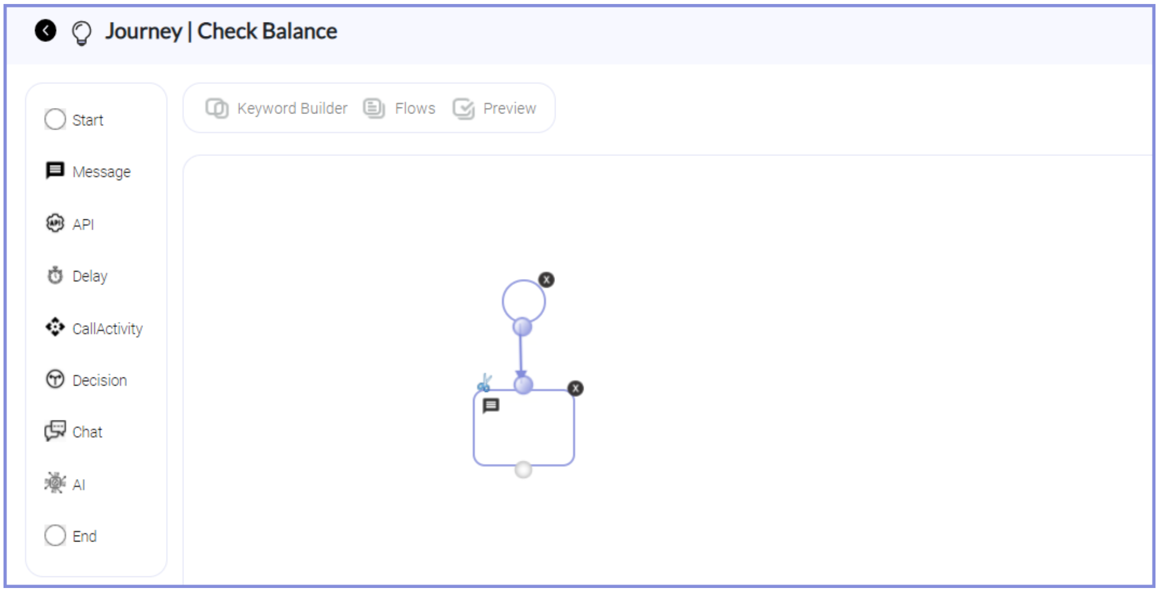
Pattern: This validation is used to check the value of the <input> element against the specified regular expression.

If you select this pattern, you have to provide a validation **Expression**.

For example, give the **expression** as **[A-Z]{5}[0-9]{4}[A-Z]{1}** for verifying the PAN card details.

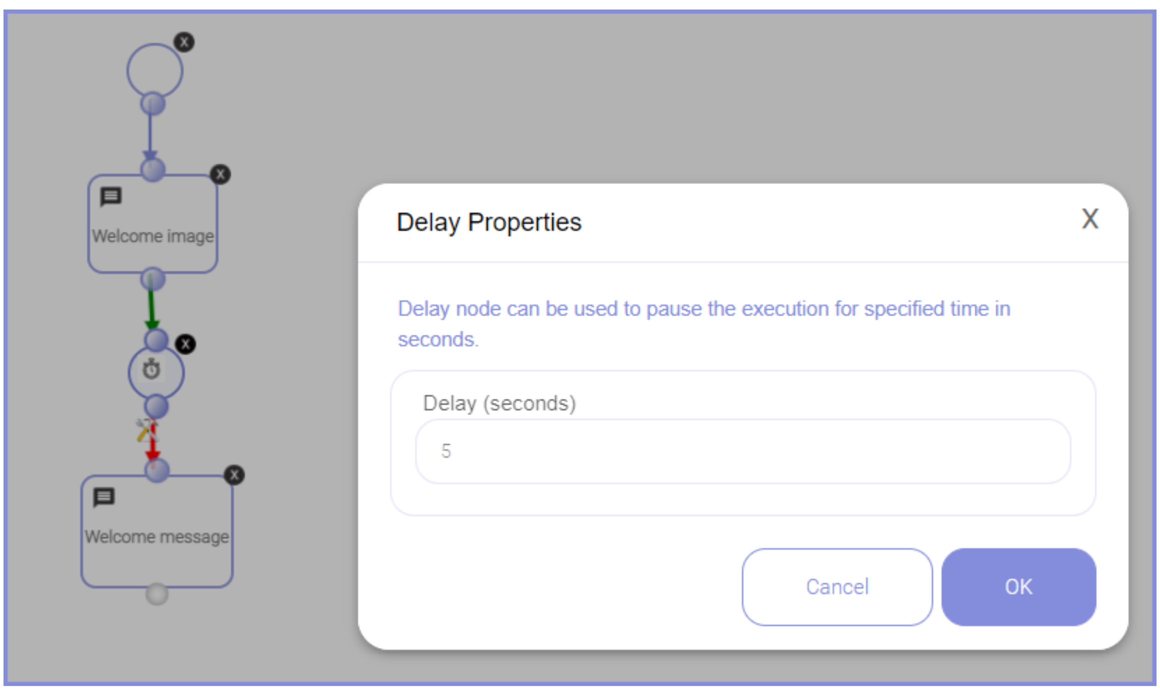
Step 8: If the user input is invalid, you can ask the user to re-enter the text the maximum number of times given in **Maximum no of retries**. An **error message** should be displayed if the retry count exceeds the given limit .

Step 9: Enter the message timeout period in seconds and the timeout message. After creating a message, the flow will look like this:



Step 10: Then add a delay node in the communication flow using a **Delay** node. Drag and drop the delay node and enter the delay (in seconds) and click **OK** to add a delay between two nodes. Here, the delay node is added between welcome image and welcome message to pause the execution for 5 seconds.

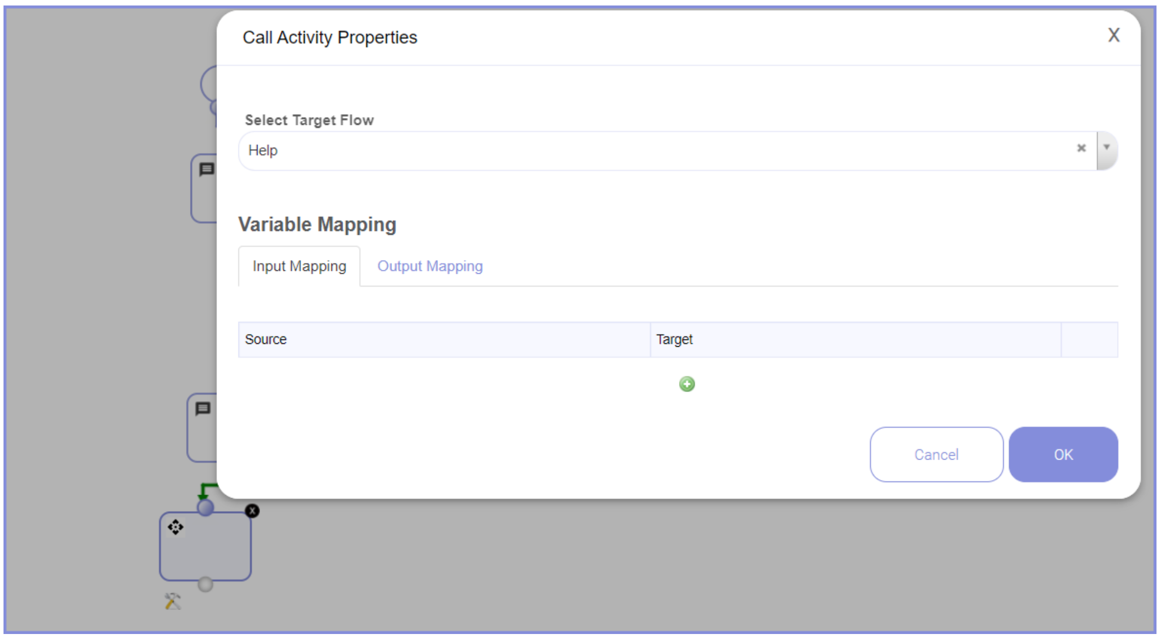
The Delay Node has only one configurable value; the number of seconds for which the next running workflow should be paused. The number of seconds can be anything from 0 (no pause) to 30 seconds. Because a workflow's maximum execution time is limited to 30 seconds, no pauses longer than 30 seconds are permitted.



Step 11: Add a another flow in the same journey using a **Call Activity** node. A Call Activity element calls another process referring to a process definition that is previously defined and is available for reuse but restricted only inside the project. The main execution waits until the called process is completed, and then the original process will continue.

Drag and drop the call activity node and choose the target process under Call Activity Properties.

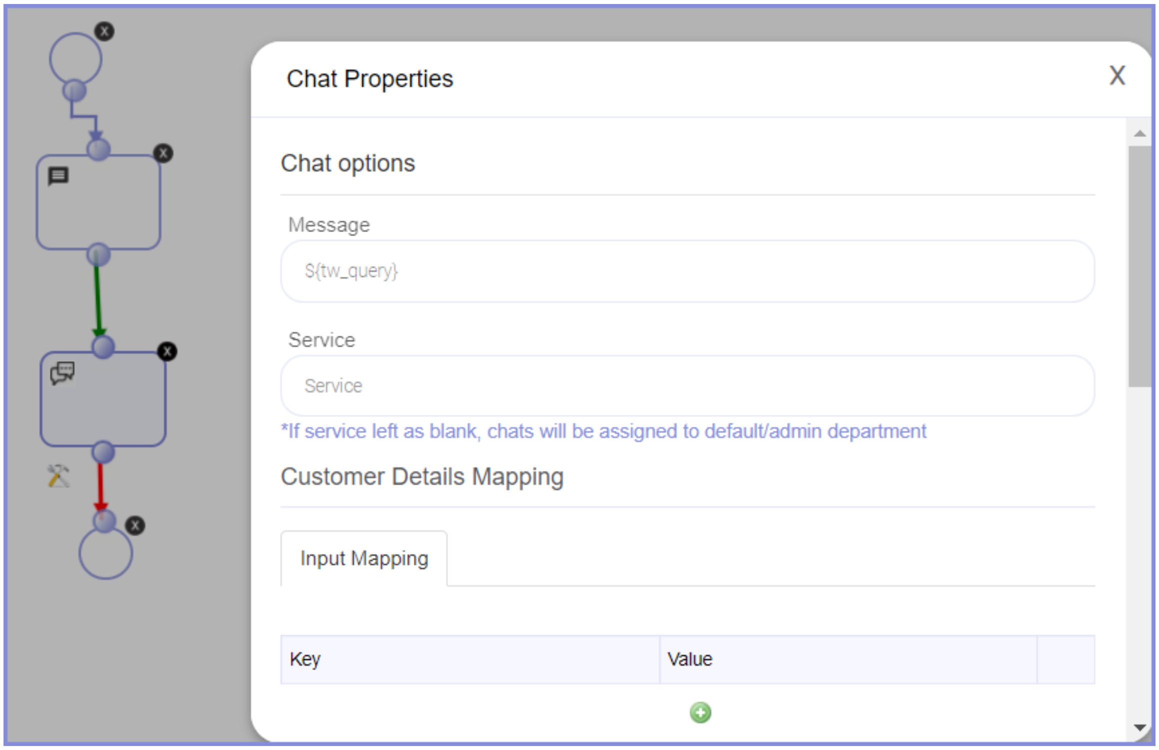
Map the target process's variables with the respective variables defined inside call activity under Variable Mapping and click **OK**.



Step 12: Add the **Chat node** to pass the client query to the agent.

In message node, enter the message to be displayed and map the variable to get the query like tw_query. Then, Drag and drop the **Chat** node and enter the variable starting with $ and within the curly braces like ${tw_query} in **Message** to pass the query message to the agent.

Enter the agent/ department name in **Service**, so that the particular chat will be sent to the corresponding agent.



Step 13: Then make a decision in the communication flow using a **Decision** node . Drag and drop the decision node and add the required conditions.

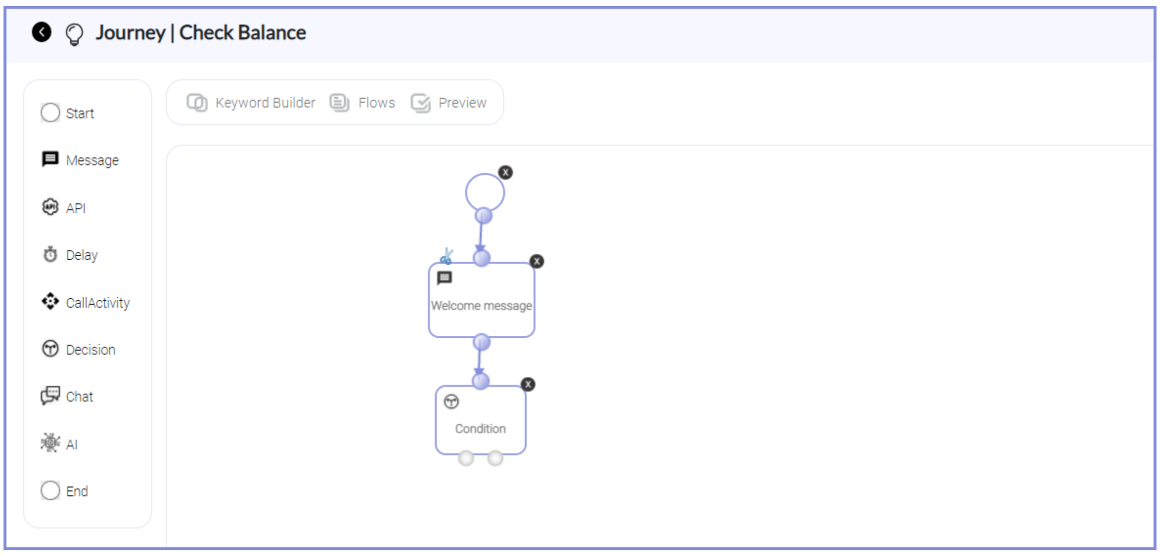
- To add a conditional branch statement, click **Add Branch**.
- Key in a unique branch label for the condition.

> **Info!** The label can be used to track the condition in the flow

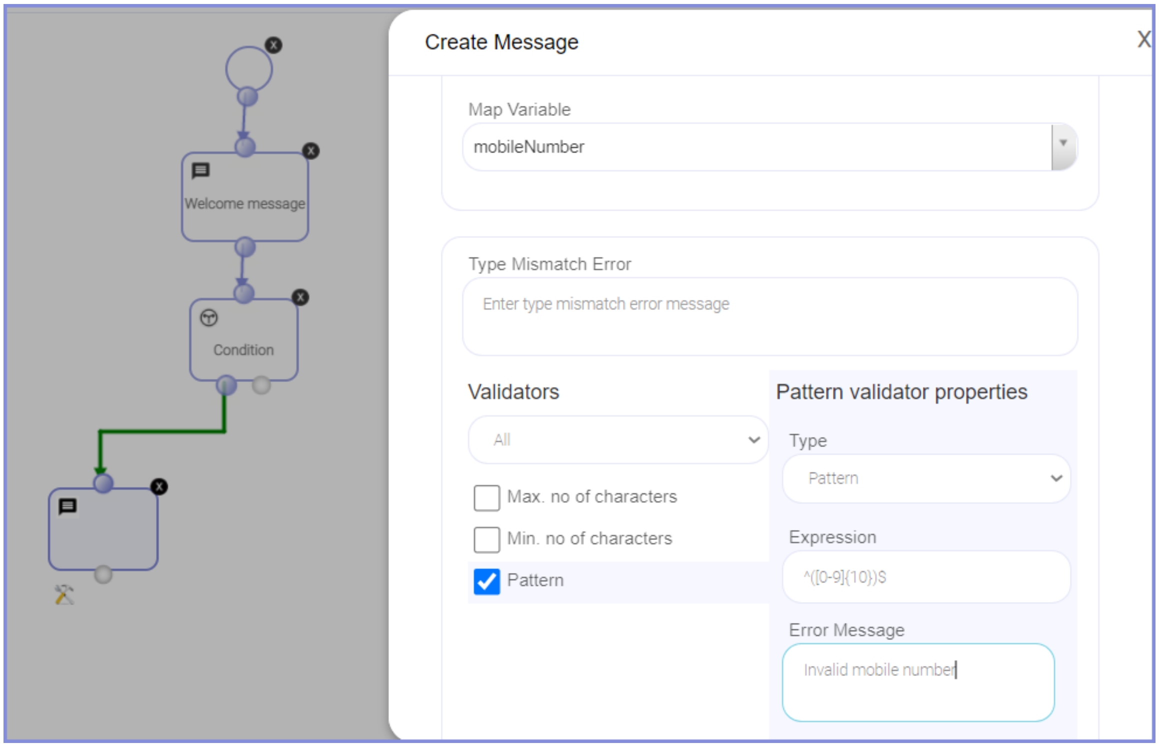
- And enter the condition starting with $ and within the curly braces like ${requestDetail.toLowerCase() == "y"}. It is used to tell that the name following the sigil symbol **$** is a variable name and not a constant or a keyword.

> **Info!** If any of the above conditions are not met, execution will jump to this branch

Look at the flow after placing the decision node.

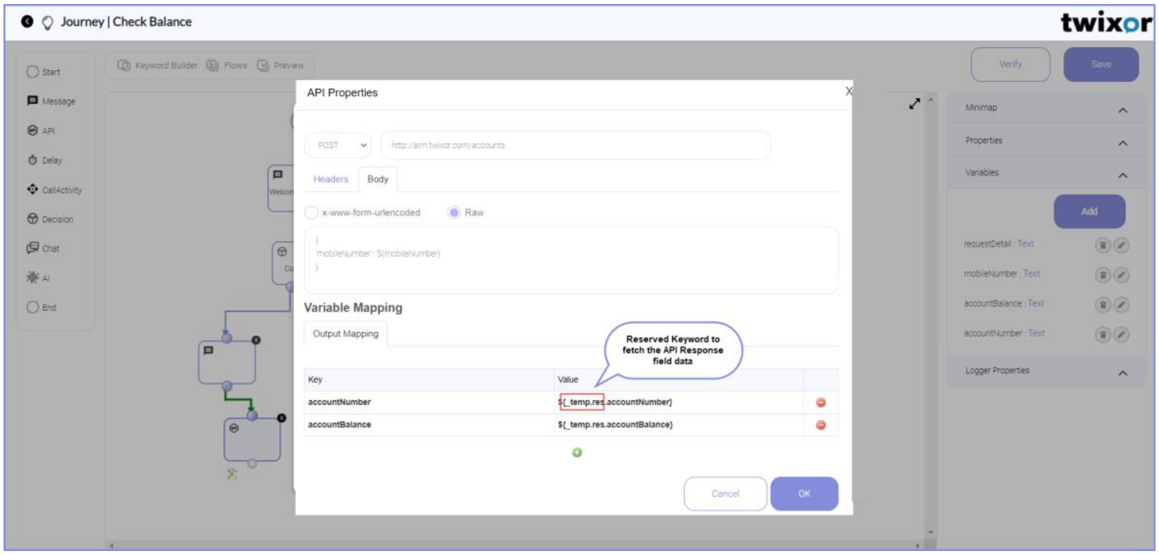


After the decision node, keep a message node to get the mobile number from the customer to find out the Account linked with that mobile number.

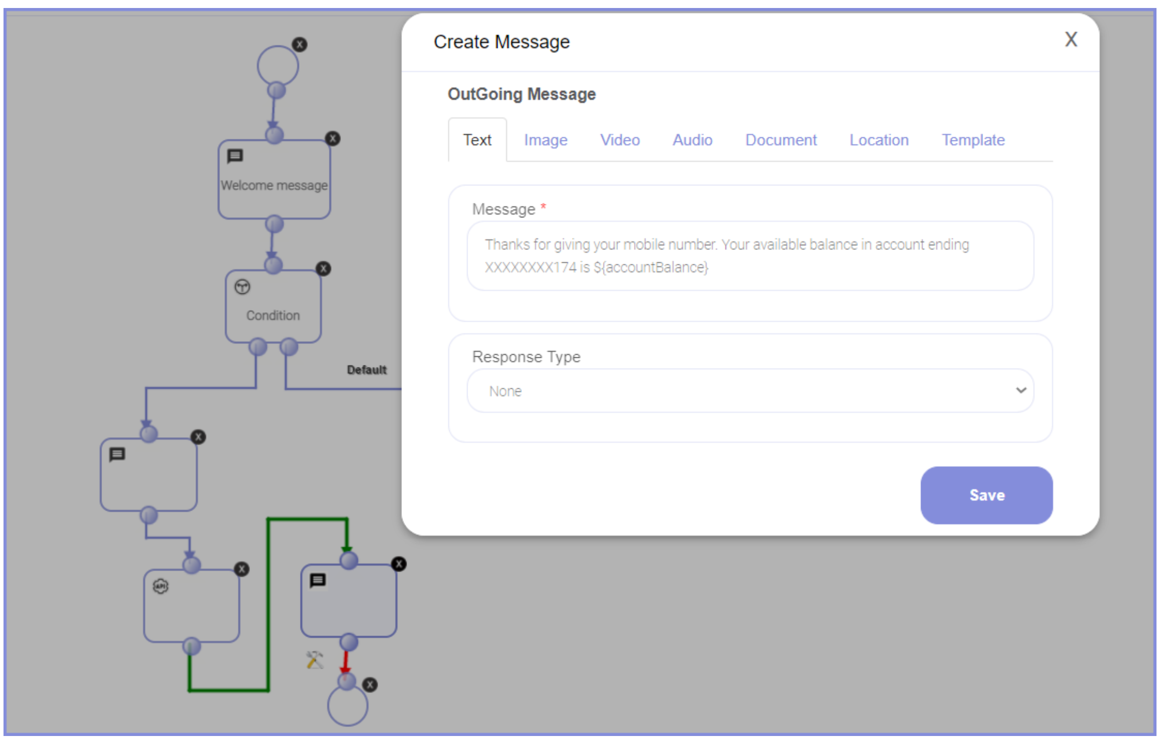


Step 14: You can also consume the third-party **Rest API** or in this conversational builder using **API node** . Let's use the rest API node here to call the **Account API** for fetching the **Account Balance** of the customer if he enters the **Yes** keyword.

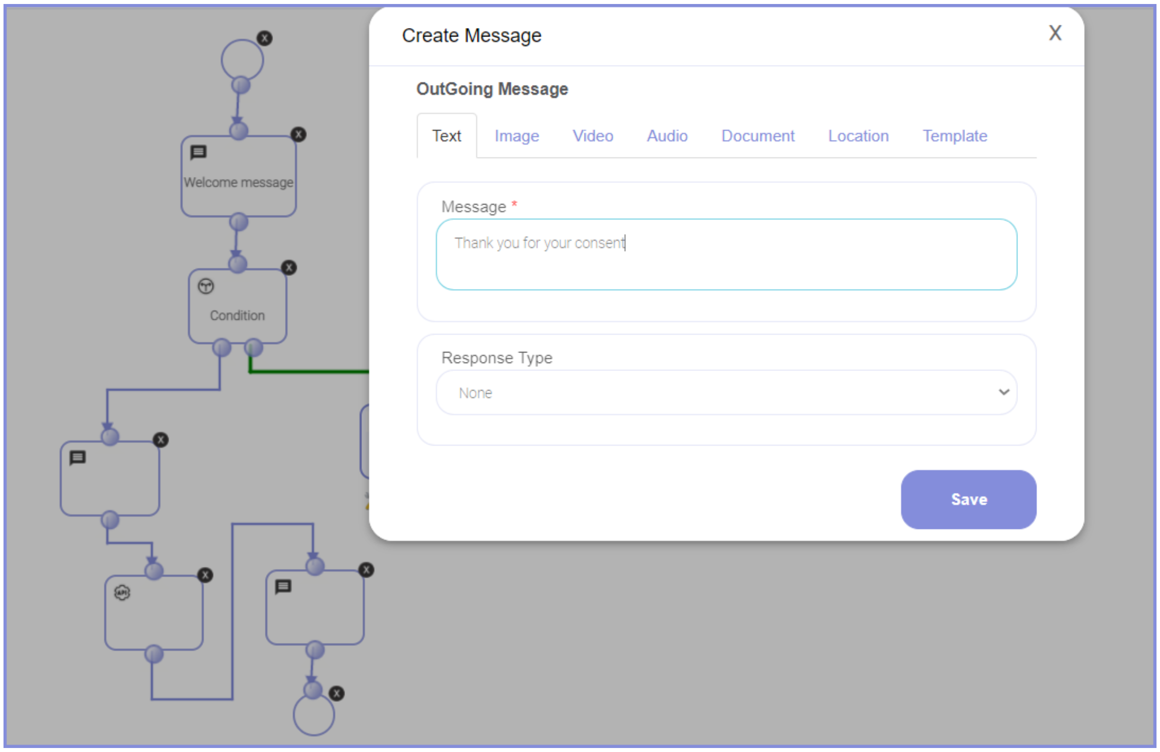
- Drag and Drop the **API Node**.
- Then configure the API properties using the steps illustrated in the **API Node** guide. For calling the REST APIs within your communication flow, refer **Consume Rest APIs** topic.
- Add a variable to fetch the API response field. Here a variable called **accountBalance** is added to obtain the API response value. Note that the reserved keyword **_temp.res** must be used before the API response field name.



- Then place a message node under **Call Account API** t$o display the Account Balance that is fetched from the API response.

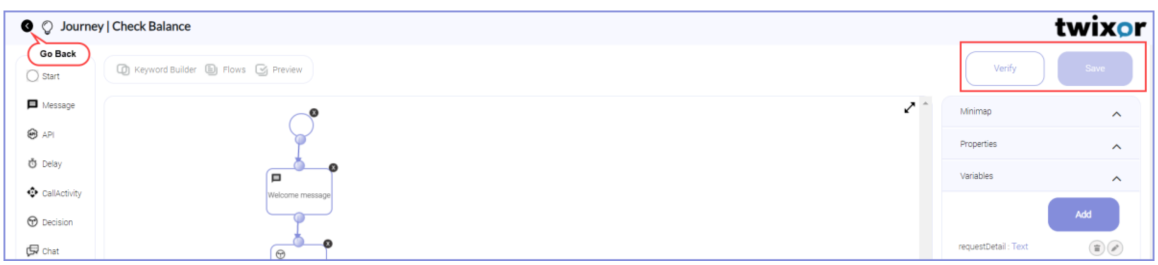


- Add another node to display a **Thank You** message when the user enters **No** keyword(the flow will jump to this Default branch).



Step 14: Then finally add the **end node** to terminate the process.

Step 15: The top menu of the designer page contains three options:



Verify: To test the workflow for any errors.

Go Back: For navigating to the previous page.

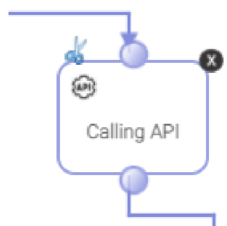
Save: To save the communication workflow.

Append a Rich Card in Twixor WhatsApp Journey

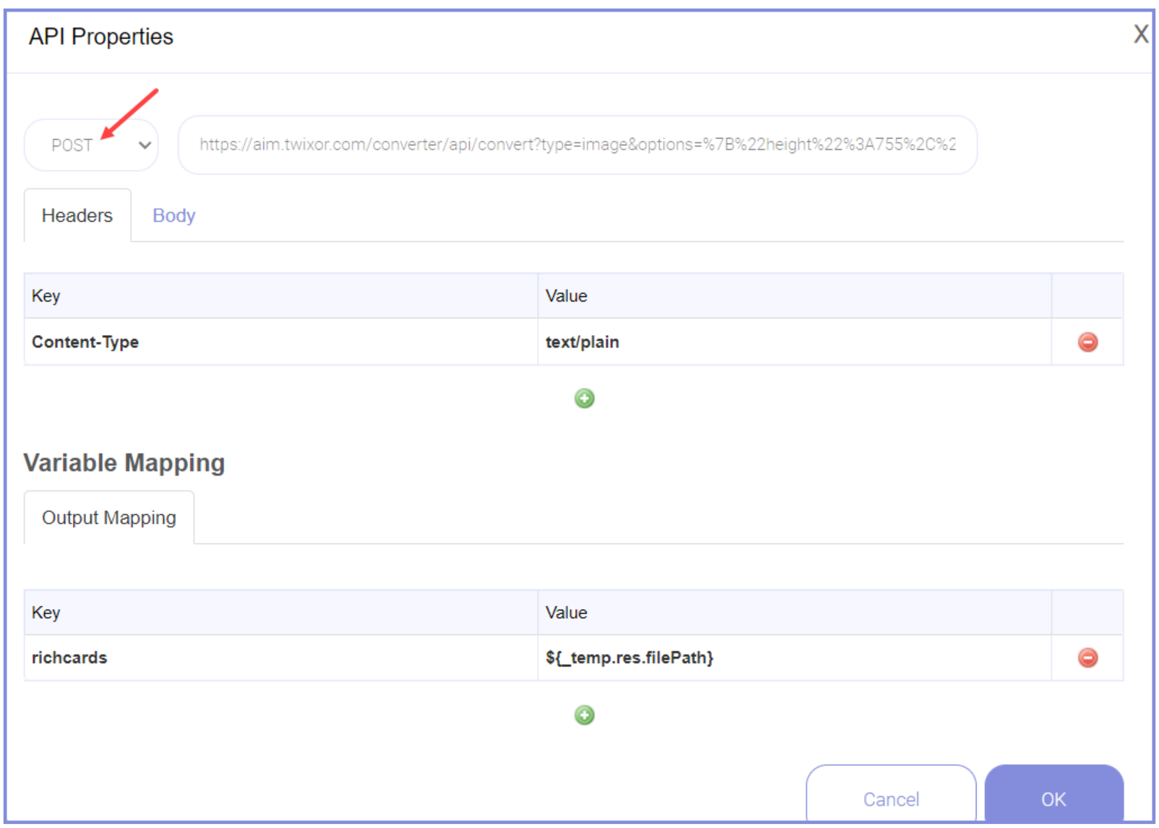
Rich cards are a new structured markup to display content in an even more engaging and visual format, with a focus on providing a better mobile user experience. Based on the input from the end-user, the final result to be displayed on the rich card is the dynamic inputs from the user.

Let us take a look at how the rich card can be embedded in the WhatsApp Journey.

A Rich card is implemented using an **API Call activity**.



After calling this API in the journey, there are predefined properties which needs to be added.



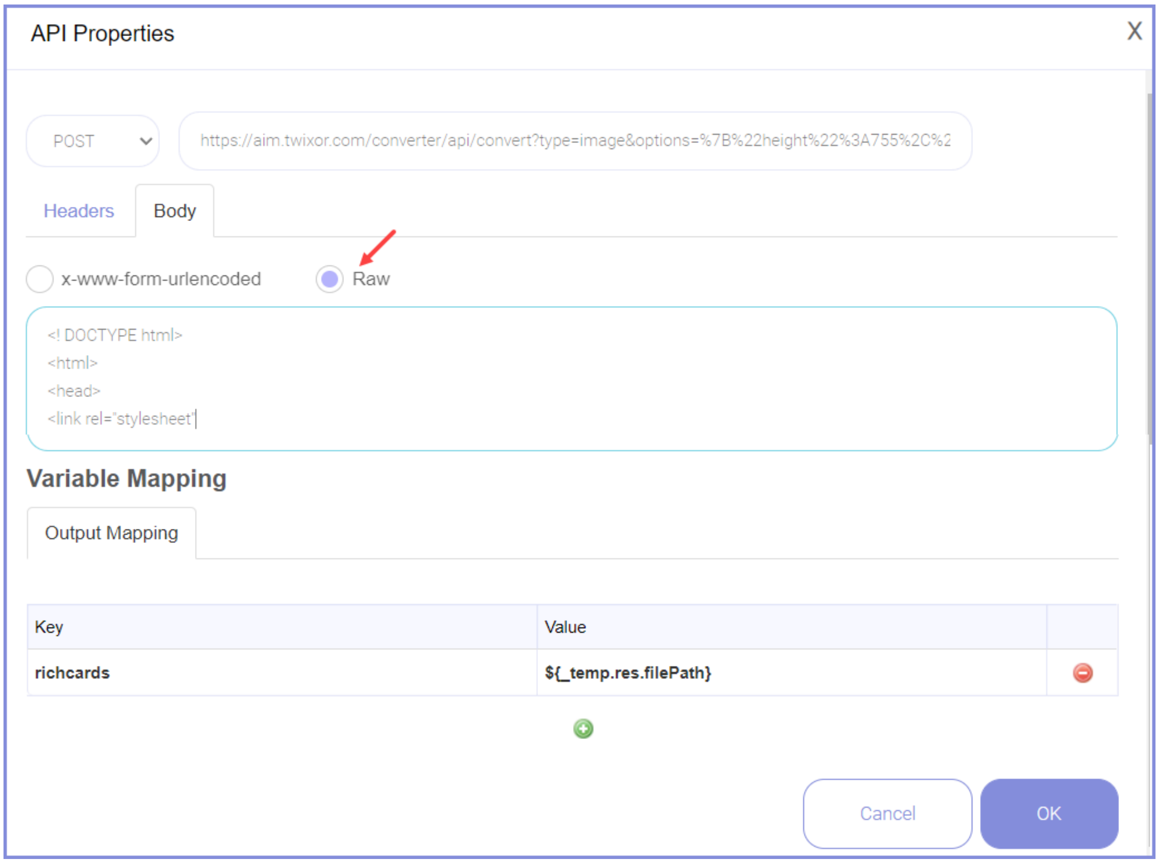
METHOD: POST – Header Side

URL: https://aim.twixor.com/converter/api/convert?type=image&options=%7B%22height%22%3A755%2C%22width%22%3A453%7D

Key: Content-Type

Value: text/plain

Body Side:

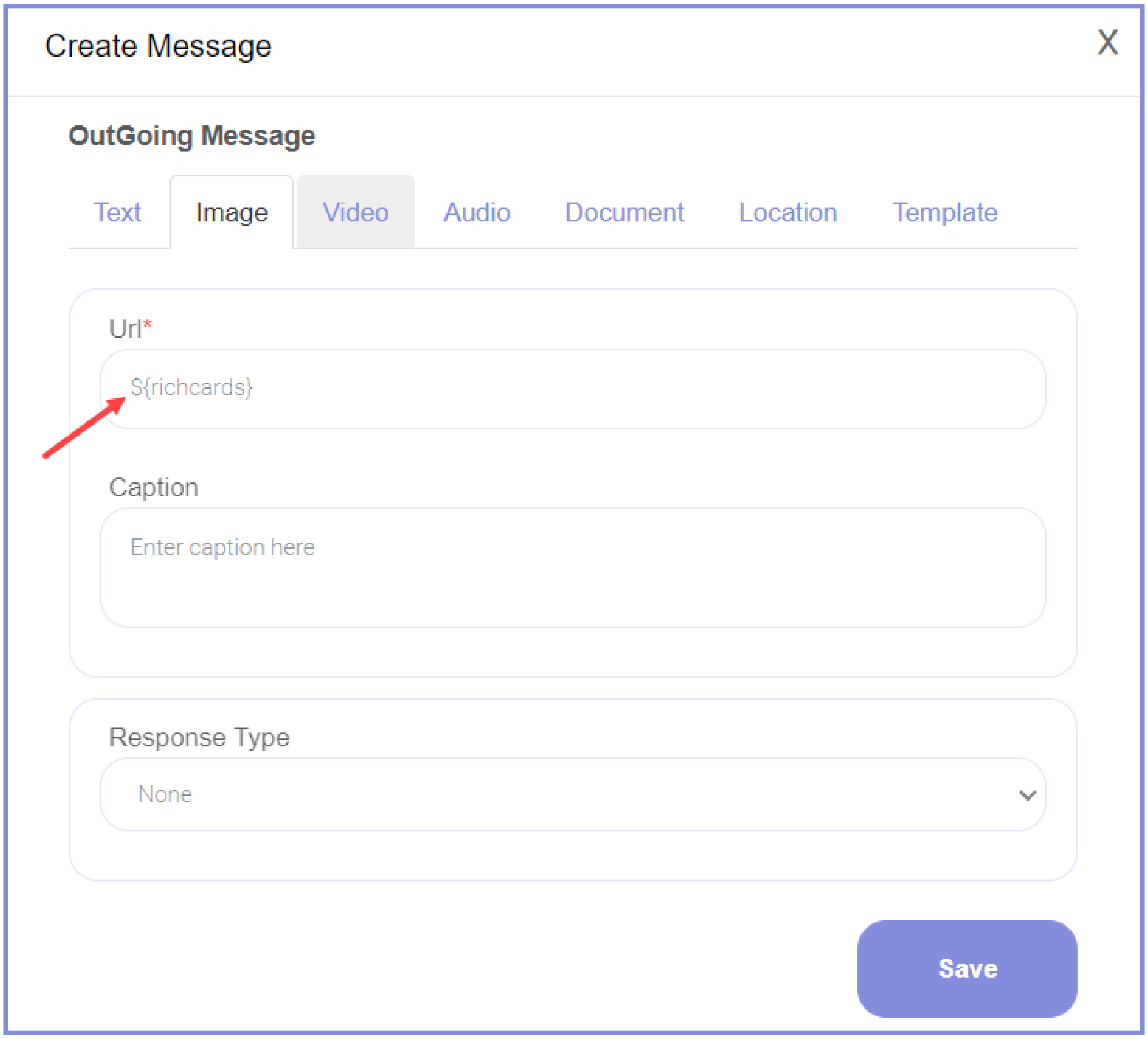


The designed Rich card will be converted to a HTML file and this that content will be copied to the raw data under the body.

A new variable to be created in the Journey. (Ex: rich cards).

Finally, under the variable mapping, the variable which was created to be called and the value **${temp.res.filePath}** to be called out.

Last step is to add a message node and print the variable under the image tab which was created.



The outcome of the rich card creation is:

Dimensions:

The rich card during the implementation, needs to be given the width and length so that the outcome exactly displays the full designed rich card. The minimum dimension needed for a rich card would be 800*800 width and length. However, these dimensions are not fixed and would vary based on the rich cards. It would be appropriate to reach out to the rich card designer for the exact dimensions.

AI Node

WhatsApp Chatbot runs on the WhatsApp platform. Once the chatbot window presents itself, the user can enter their reply in plain English. The bots will respond to the reply when it receives as normal WhatsApp messages and respond to them.

For example, for selecting the preferred language 1 for English and 2 for Arabic, client can send either 1 or 2. Suppose if a client enters the message as a plain text (English or Arabic), the corresponding flow should be continued. This can be achieved by using AI node.

Sample flow for selecting the gender

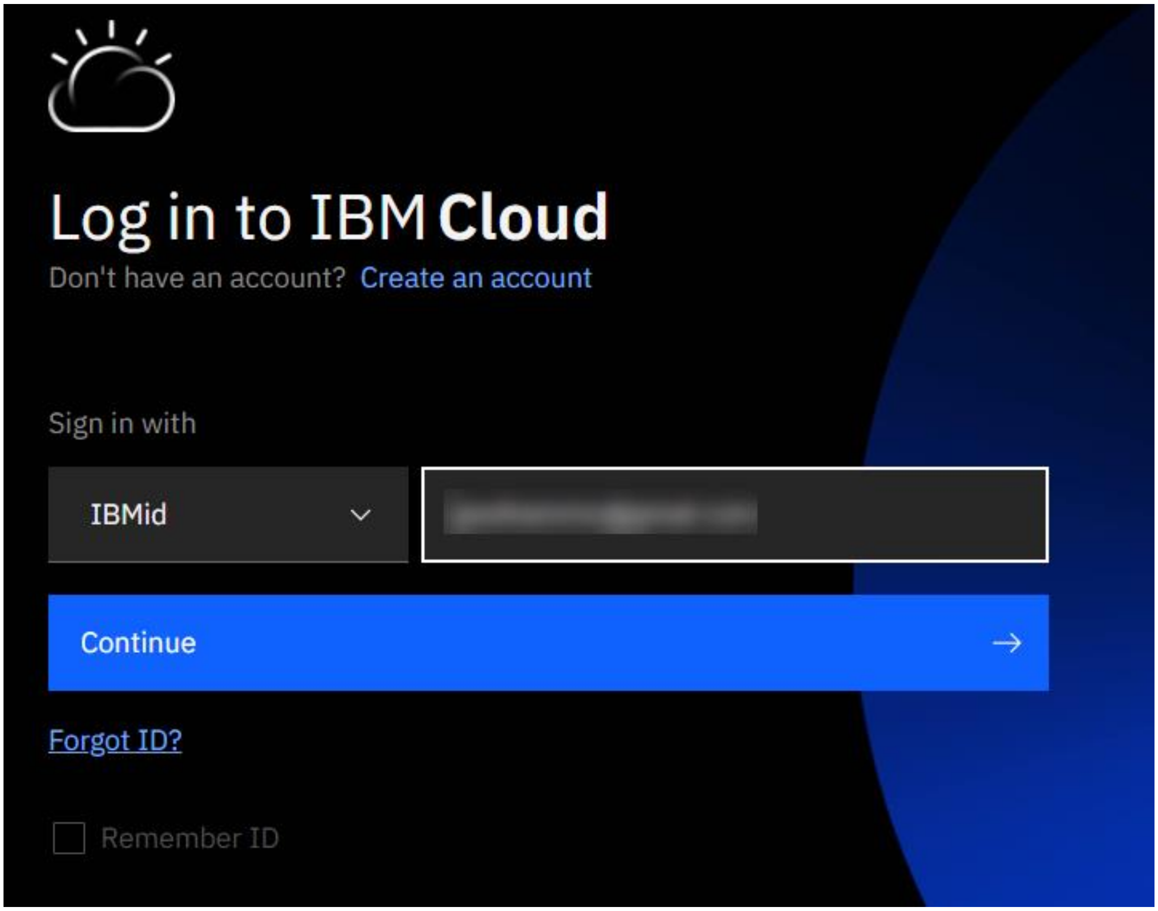
1. Create a flow in the journey
2. Add a new variable for selecting the gender
3. In message node, enter the message as select your gender 1. Male 2. Female. Select the response type as “User” and map the variable you have created.
4. Then, drag and drop the decision node to add the conditions.
5. Add the message for each condition
6. Now, connect the default branch to **AI node**.

To add the properties in AI Node for IBM Watson, follow the below steps,

Step 1: Login to IBM Watson

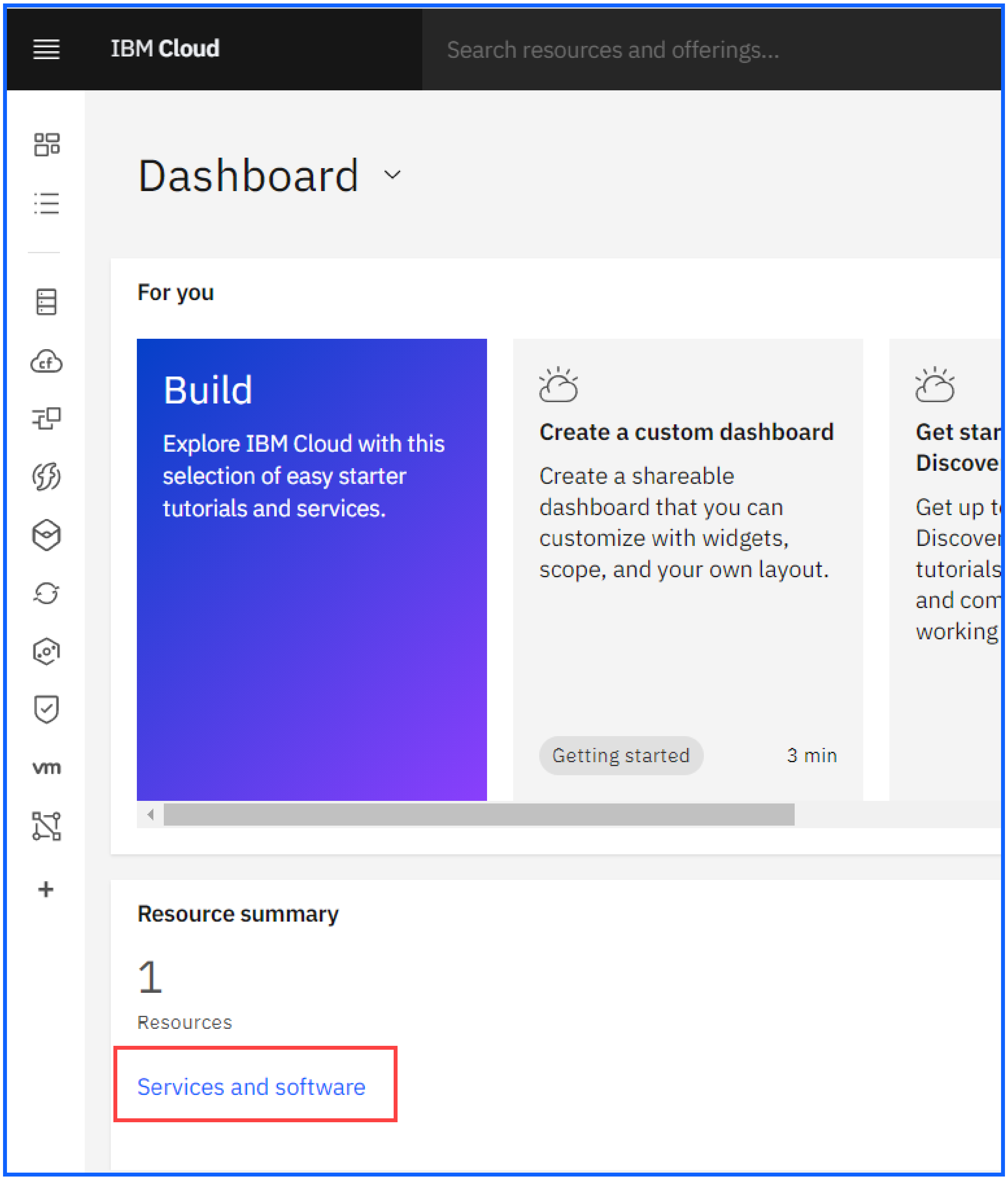
Go to https://cloud.ibm.com/login and sign in with your mail id and password and click **Login** to direct into dashboard page.

> **Info!** Watson Assistant has classifier models that are designed specifically to support conversational skills in the following languages: Arabic, Chinese (Simplified), Dutch, English, French, German, Italian, Japanese, Korean, Portuguese, Russian, Spanish, Swedish.

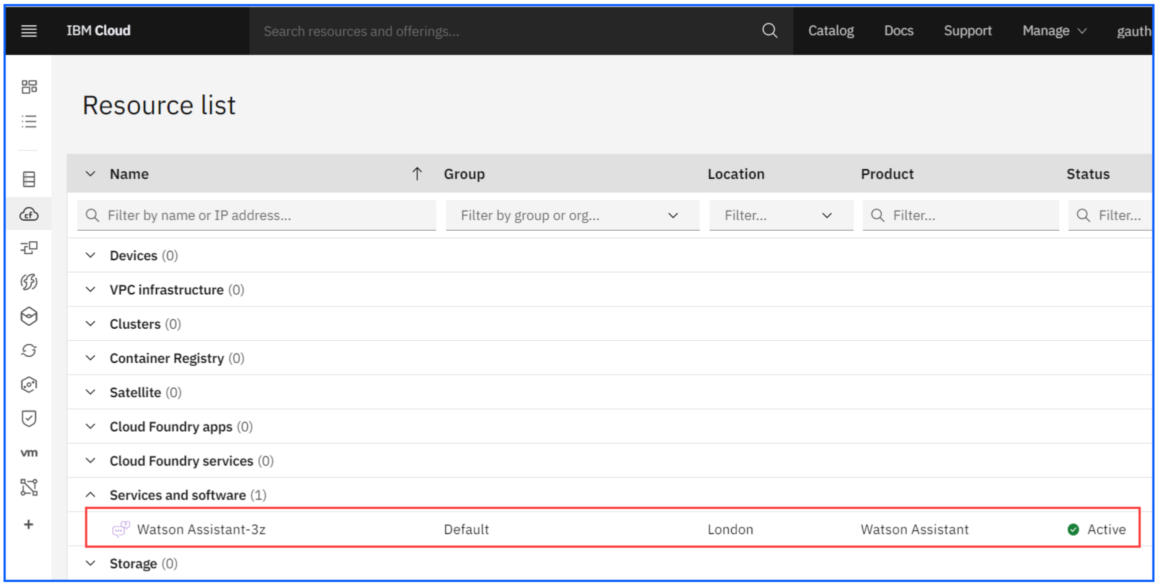


Step 2: Open Watson Assistant

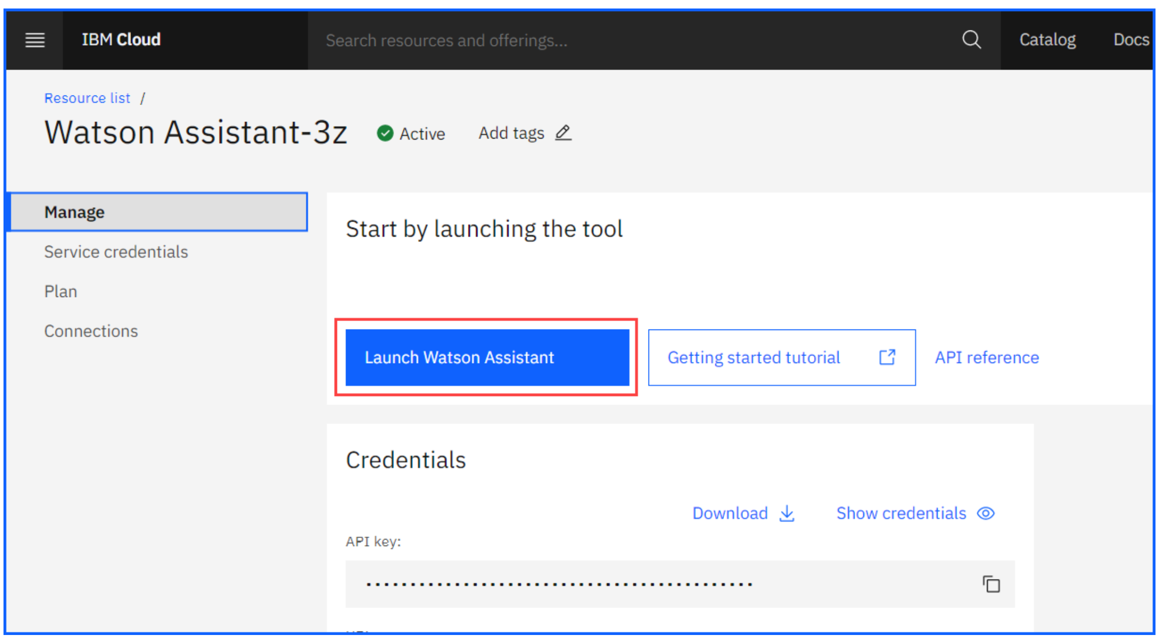
- Click **Services and software** under Resource summary.



- Click **Watson Assistant -3z** in Services and software.



- Now, click Launch Watson Assistant to open the Watson Assistant workspace.



Step 3: Create an Assistant

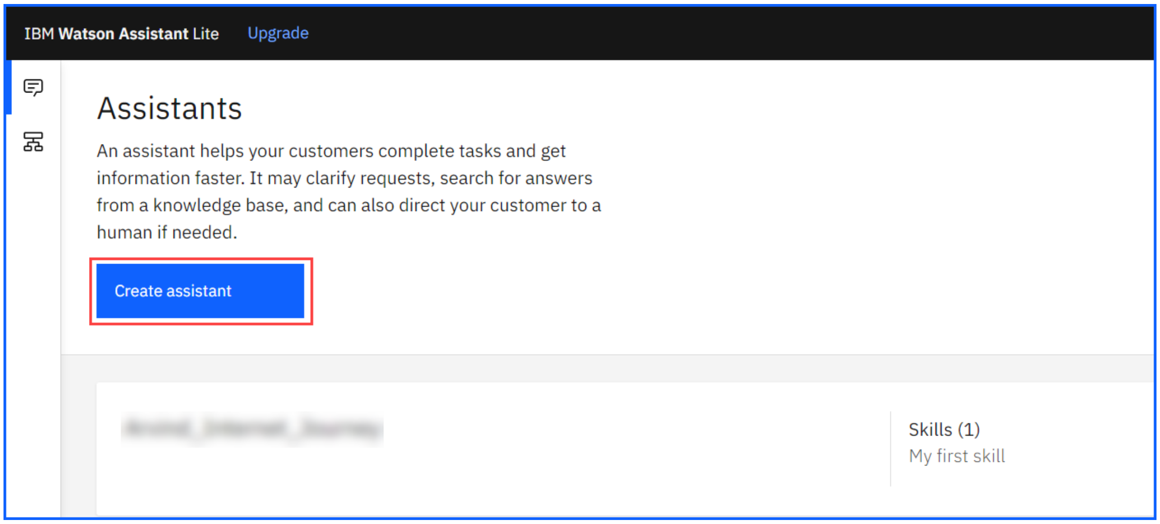
You must use assistants to maintain separate intents, user examples, entities, and dialog flows for each application.

- Click **Create Assistant**
- Add details about the new assistant:

Name: A name no more than 100 characters in length. A name is required.

Description: An optional description no more than 200 characters in length.

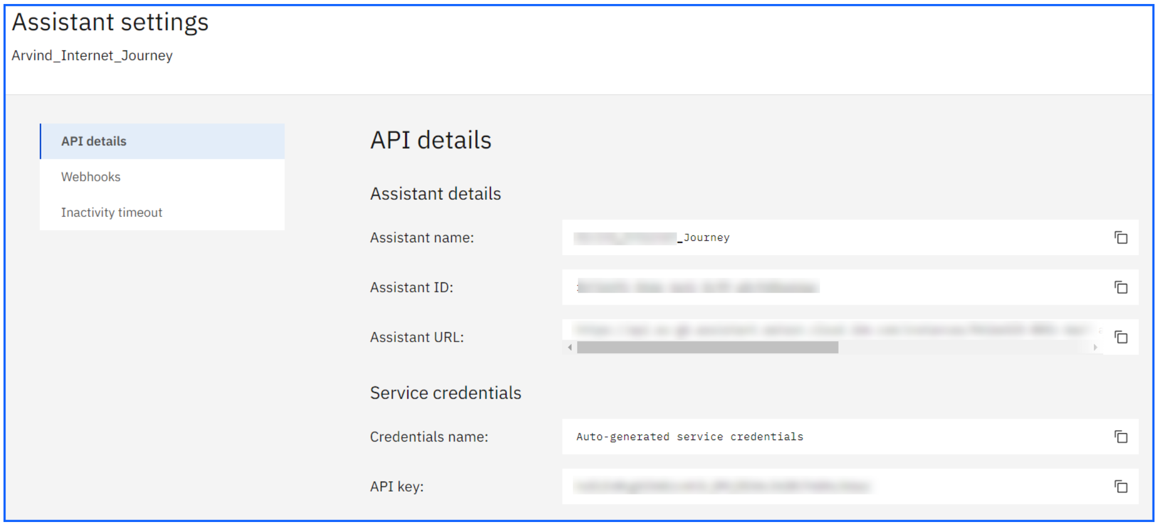
- Click **Create assistant**.

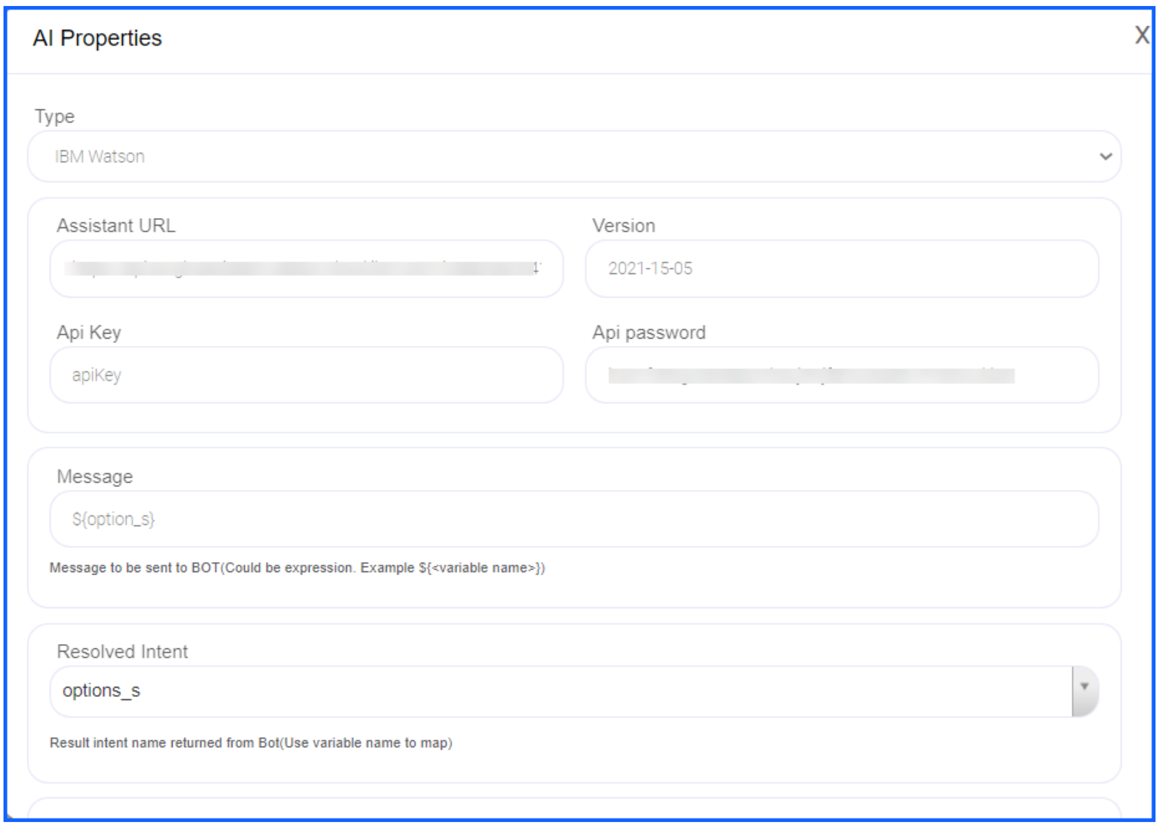


Step 3: Adding Watson URL and API key

- After creating an assistant, click ⋮ icon and settings.

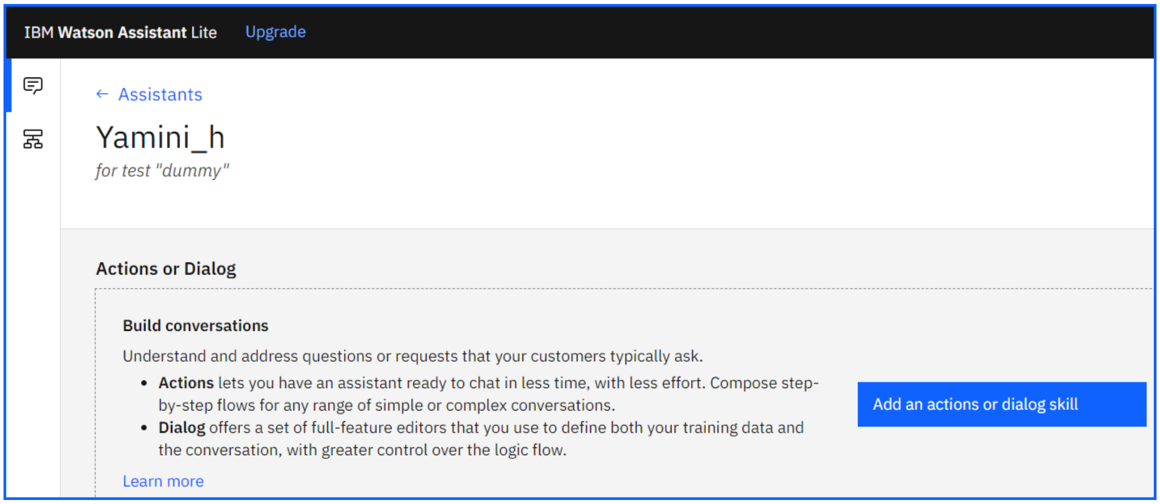
- Copy the Assistant URL and API key and paste it in AI Node Properties (Assistant URL and API password).
- Enter the Version, API key, message and Click **OK**.





Step 4: Add an actions or dialog skill

From the assistant where you want to add the skill, click **Add an actions or dialog skill**.



In **Create Skill** tab, you can choose to add an existing skill or create a new one to feed the skill into the assistant.

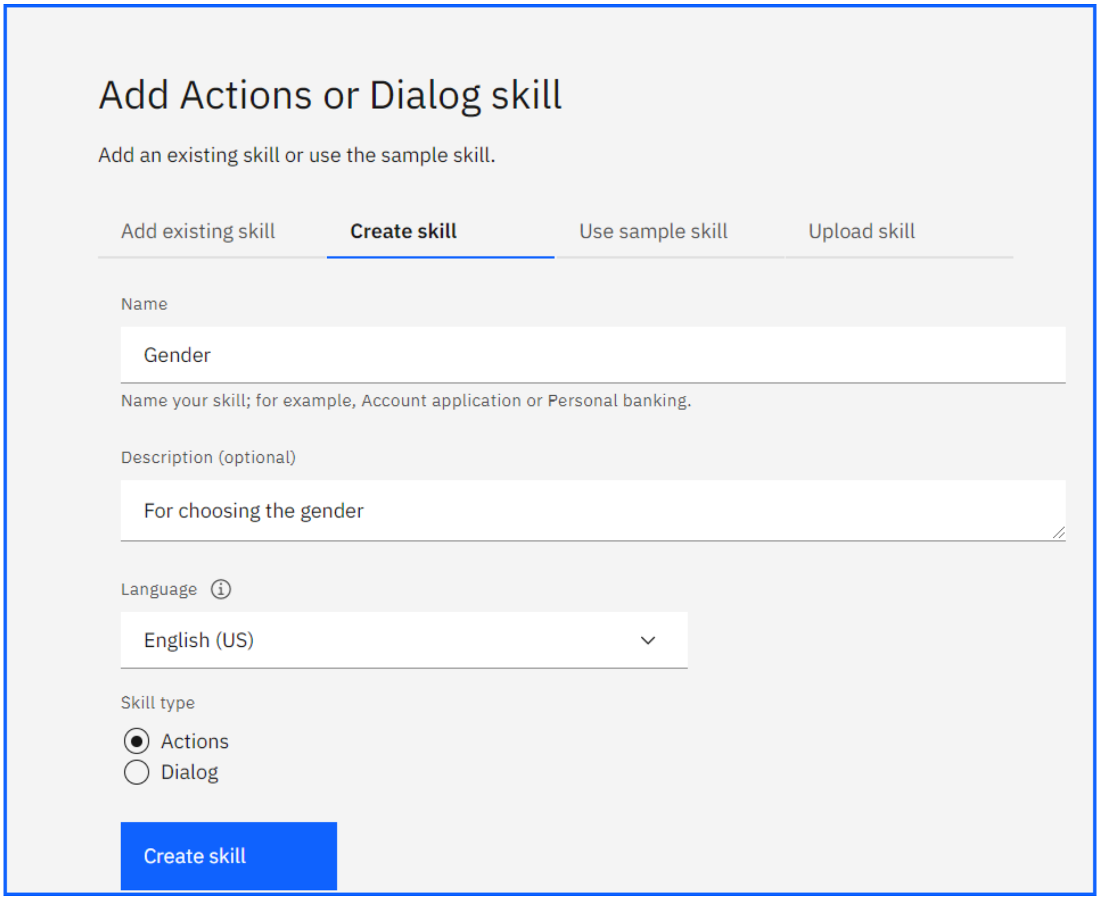
- To create a new dialog skill, remain on the **Create skill** tab.
- Specify the details for the skill:

Name: A name no more than 64 characters in length. A name is required.

Description: An optional description no more than 128 characters in length.

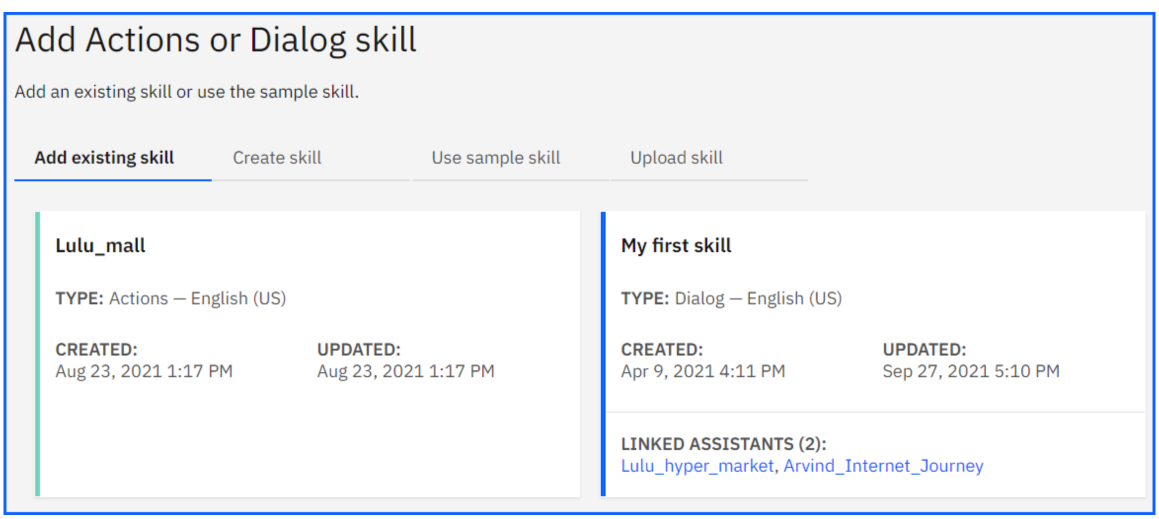
Language: The language of the user input the skill will be trained to understand. The default value is English.

- For Skill type, choose Dialog.
- Click **Create skill.**

- 

Adding the existing skill

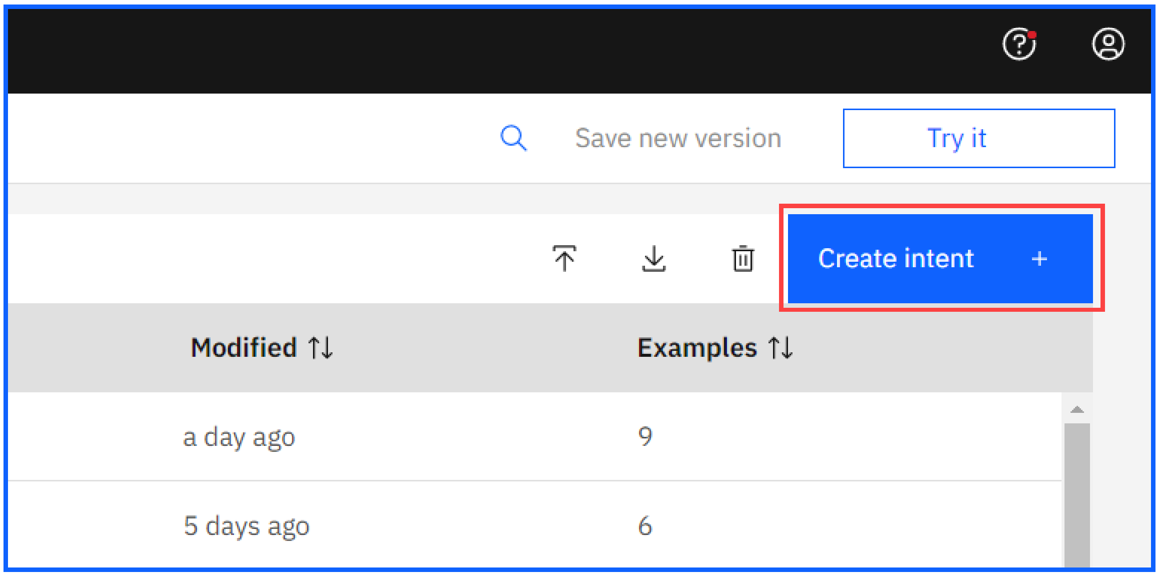
1. From the Assistants page, click to open the tile for the assistant to which you want to add the skill.
2. Click **Add an actions or dialog skill**.
3. Click **Add existing skill**.

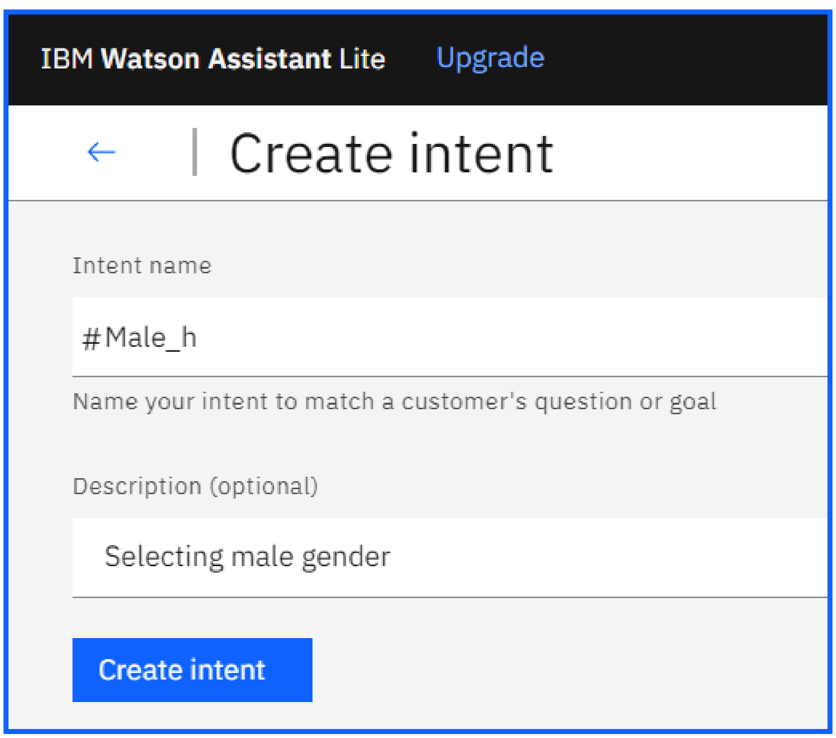


Step 5: Create Intents

Intents are purposes or goals that are expressed in a customer's input, such as answering a question. By recognizing the intent expressed in a customer's input, the Watson Assistant service can choose the correct dialog flow for responding to it.

- Open your dialog skill. The skill opens to the Intents page.
- Select **Create intent**.
- In the Intent name field, type a name for the intent.

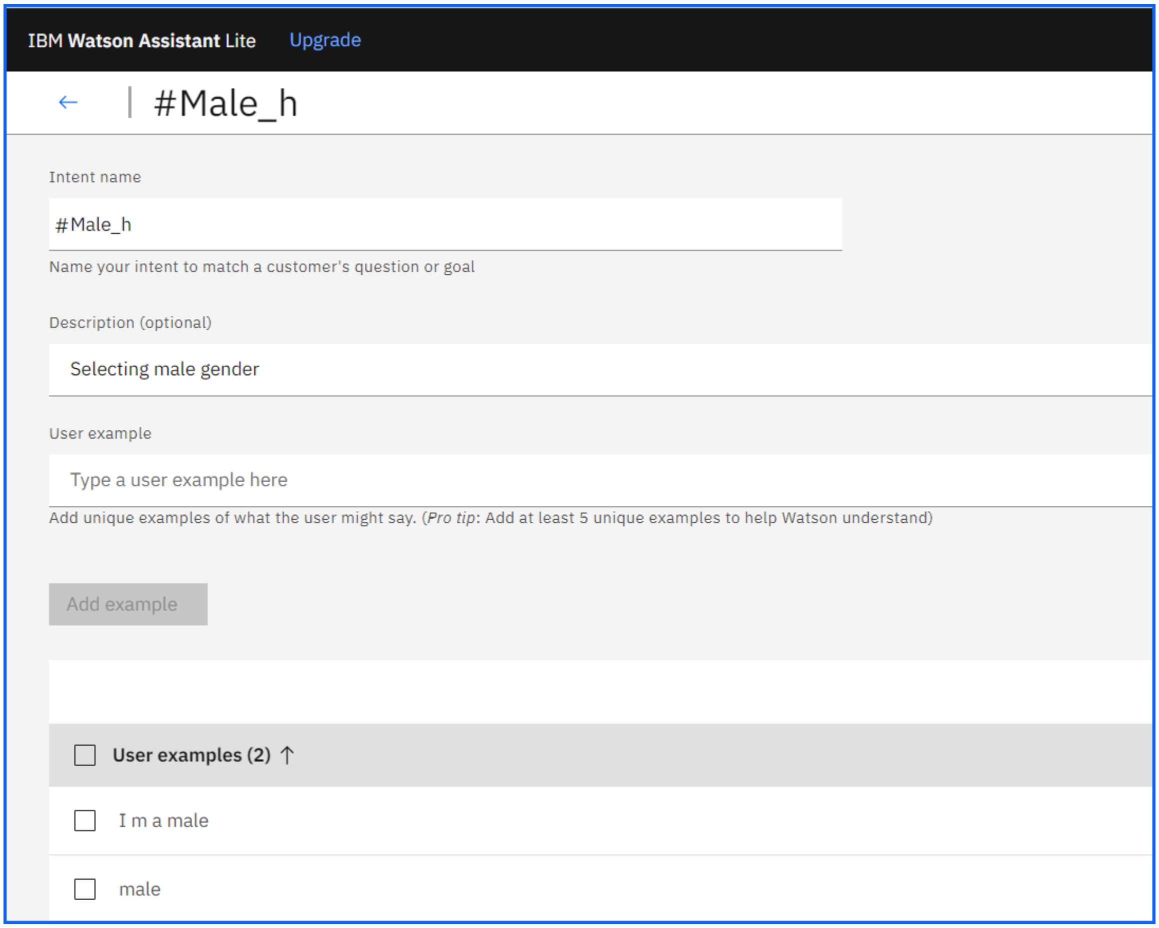




- Optionally add a description of the intent in the Description field.
- Select **Create intent** to save your intent name.
- Click **Add example** to save the user example.
- For each intent, add examples to train the conversation for intent recognition.

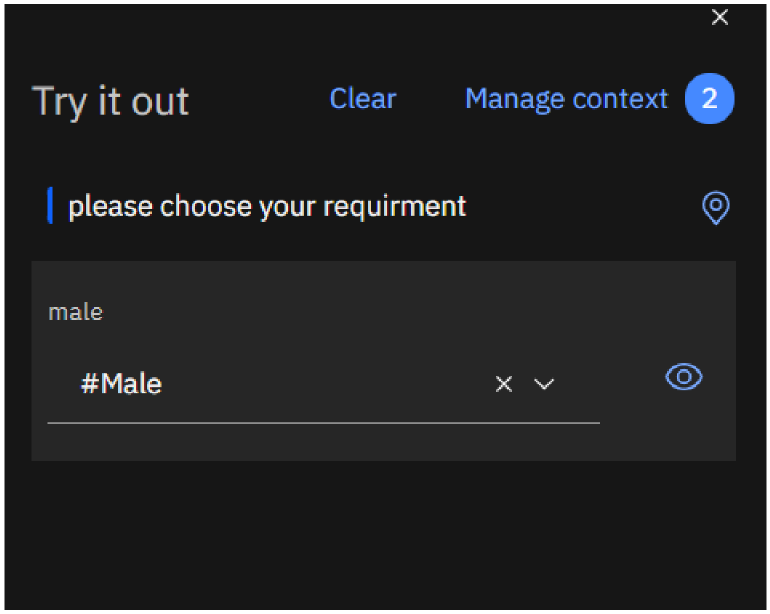
Create the Male intent and add examples for it. You can enter the same examples as shown in the below image. Similarly, add the intent and examples for female also.

When you are done adding examples, click Close arrow to finish creating the intent.



Step 6: Test the Intents

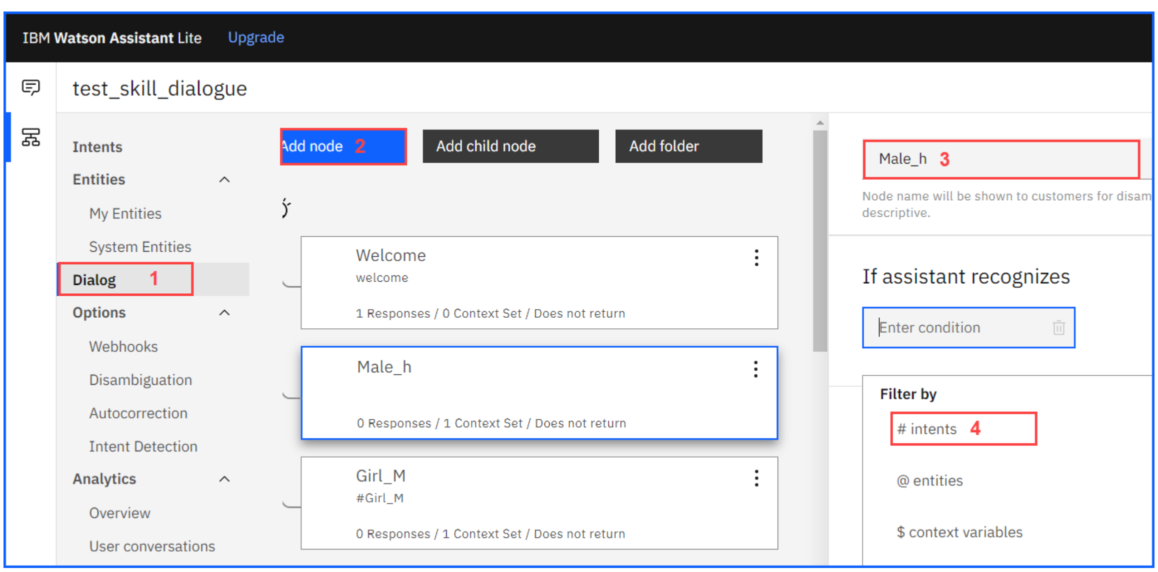
- As soon as you create an intent, you can test it by clicking **Try it** button in the top, right-hand side of the page.
- Enter a question or other text string and press **Enter** to see which intent is recognized. If the wrong intent is recognized, you can improve your model by adding this text as an example to the correct intent.
- You should get the #Male intent identified by Watson.

- 

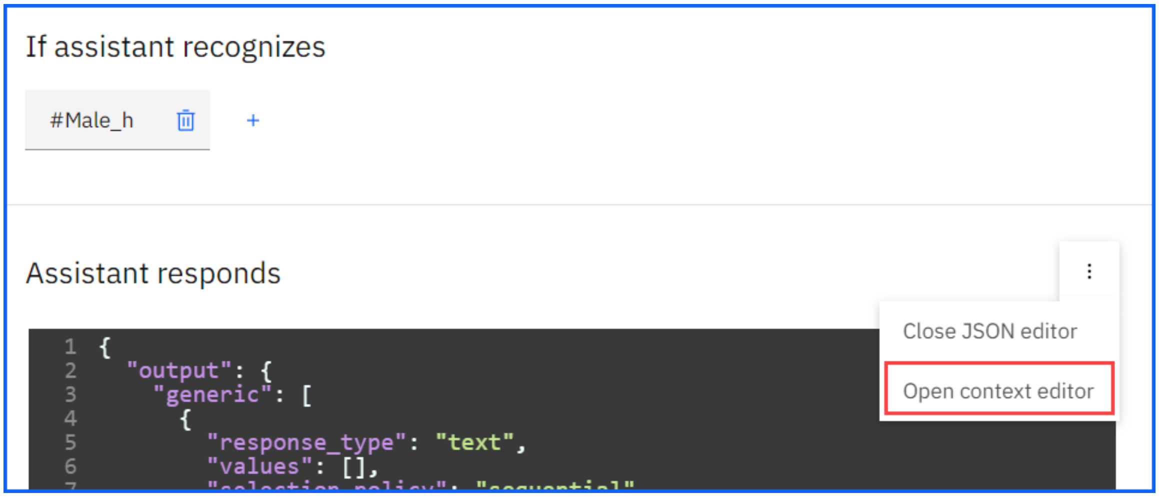
Step 7: Build the dialog

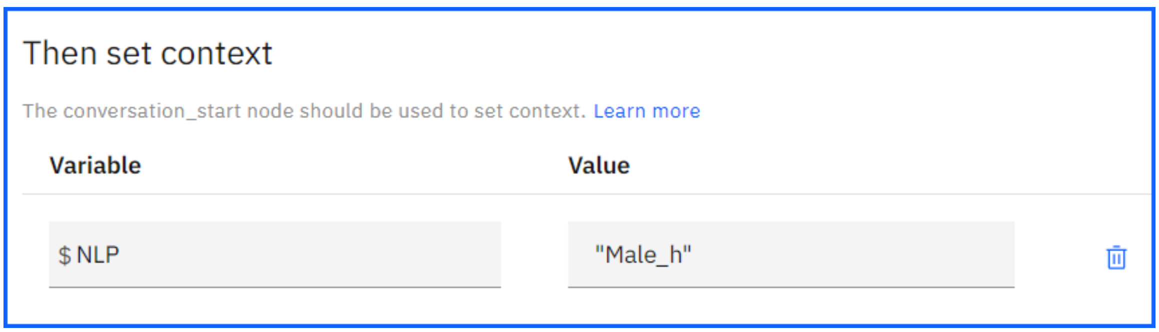
After you specify your intents, you can construct the dialog flow. A dialog is made up of nodes that define steps in the conversation.

- From the Skills menu, click **Dialog**.
- Click **Add Node**
- Enter the node name (Node name should be the intent name you have created in step 5)
- Then choose the filter as intents and enter the node name in Enter Condition text box.



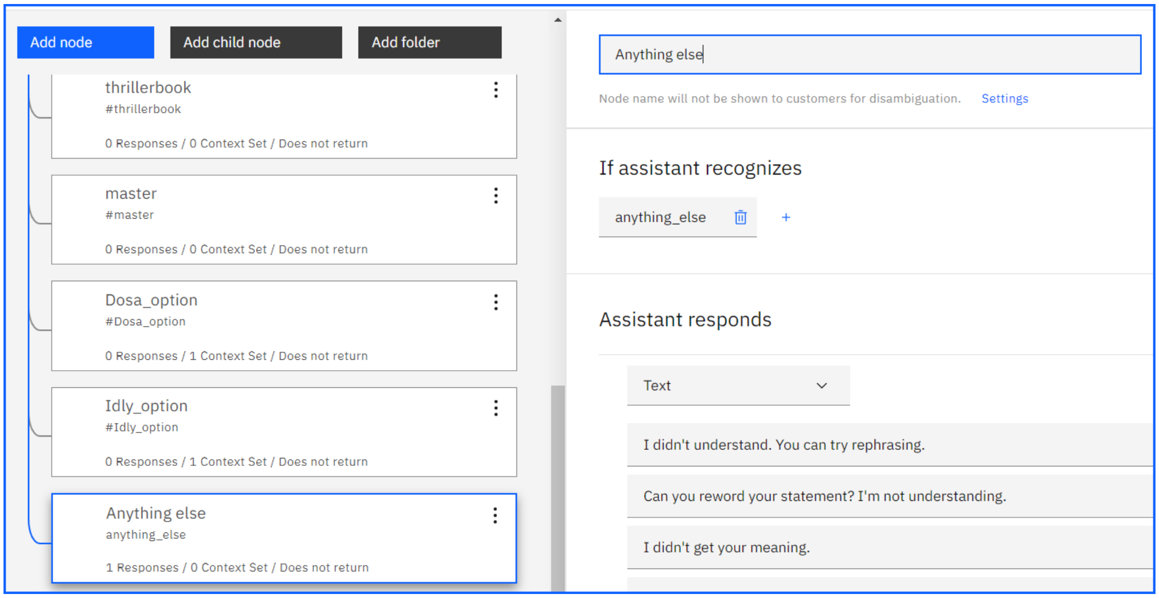
- In Assistant response, choose **Open Context editor**.
- Now enter the variable and value. For WhatsApp use the variable as $NLP to connect the Twixor WhatsApp Journey and **IBM Watson.** Enter the intent name in **variable** field.





We can handle the exception using **Anything else** keyword from Watson when the decision node default value holds the AI node.

Add **anything else** node that contains phrases that are used to reply to users when their input is not recognized. You can replace the responses that are provided or add more responses with a similar meaning to add variety to the conversation. You can also choose whether you want your assistant to return each response that is defined in turn or return them in random order.

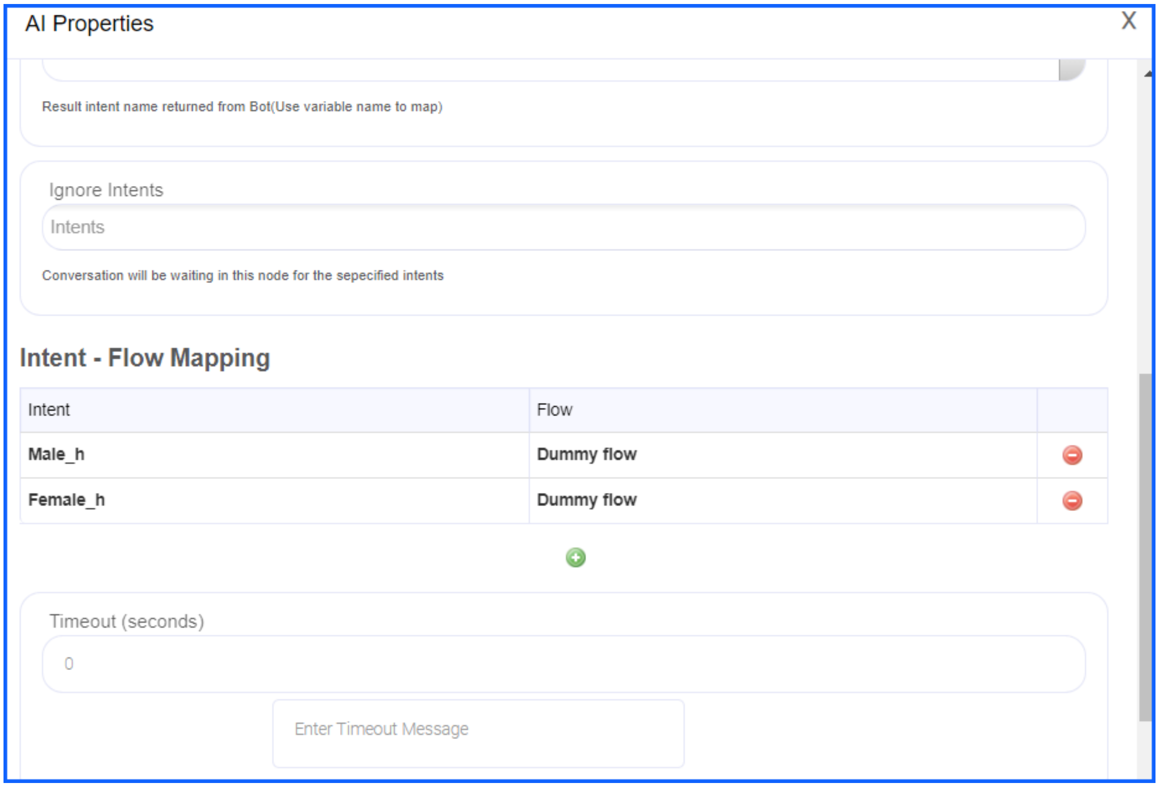


Step 8: Add the intent in AI node

Open the AI properties, add the intent which you created in IBM Watson and create a dummy flow in the corresponding journey and add in AI properties.

> **Info!** Watson Assistant has classifier models that are designed specifically to support conversational skills in the following languages: Arabic, Chinese (Simplified), Dutch, English, French, German, Italian, Japanese, Korean, Portuguese, Russian, Spanish, Swedish.

Then add a decision node to map the intent to the corresponding field and end the flow.


AI Properties
X
Result intent name returned from Bot(Use variable name to map)
Ignore Intents
Intents
Conversation will be waiting in this node for the sepecified intents
Intent - Flow Mapping
Intent
Flow
Male_h
Dummy flow
Female_h
Dummy flow
Timeout (seconds)
0
Enter Timeout Message

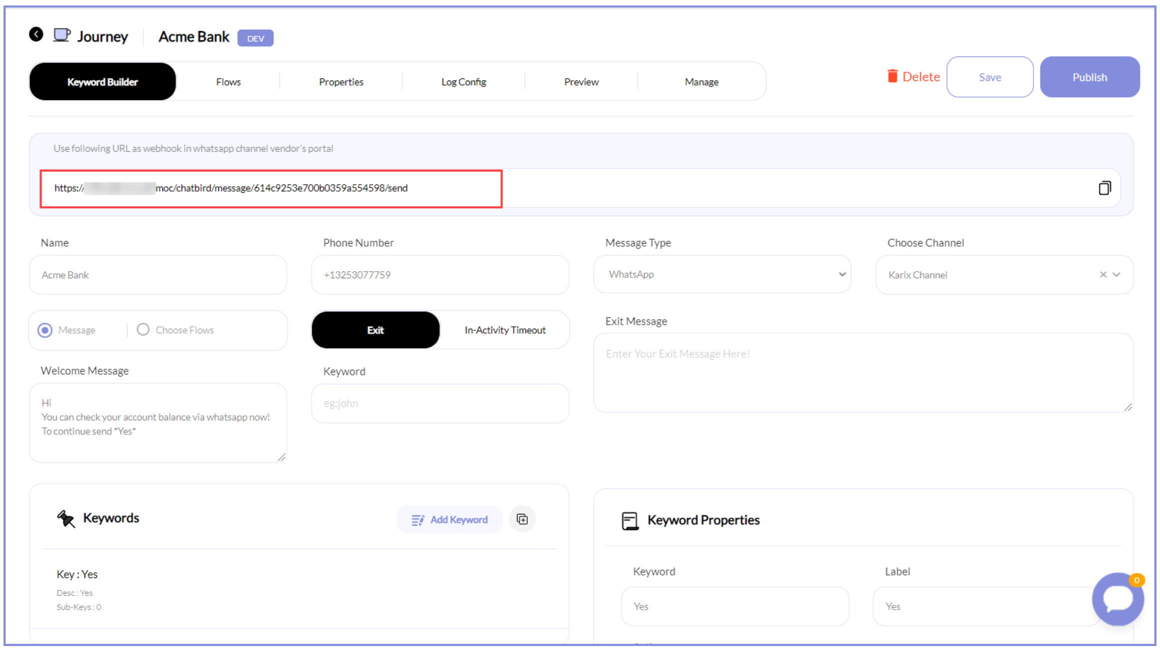
Publish the WhatsApp Journey

Once you have completed creating the communication flow and mapping the keywords with the associated flow, you are now ready to publish the WhatsApp journey.

Follow these steps to publish the journey via WhatsApp:

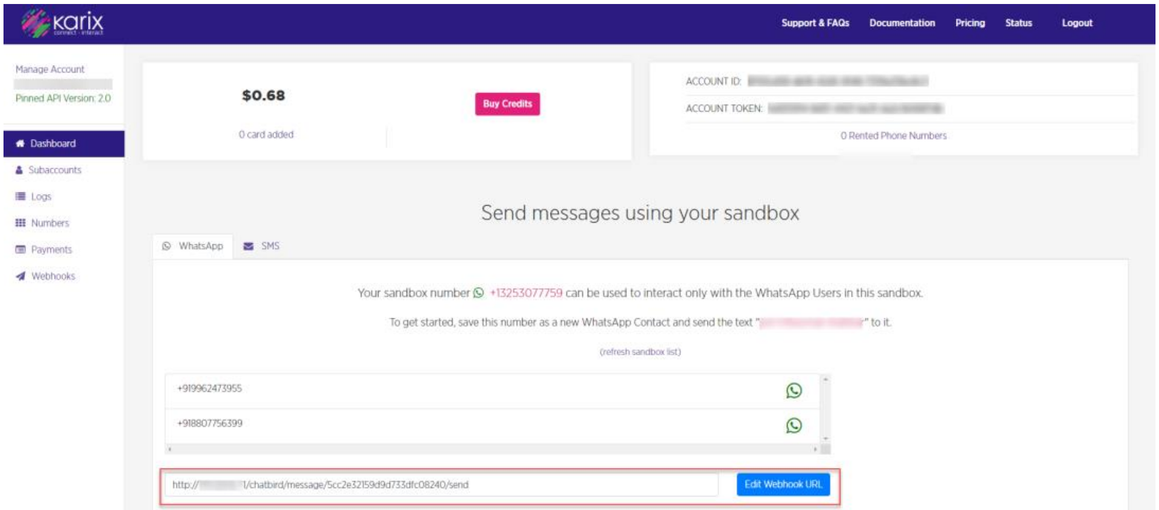
1. **Verify** your flow and **map the keywords** with the flow before publishing.

2. Copy and paste the webhook URL (given in Keyword Builder page) in the WhatsApp Channel vendor portal.



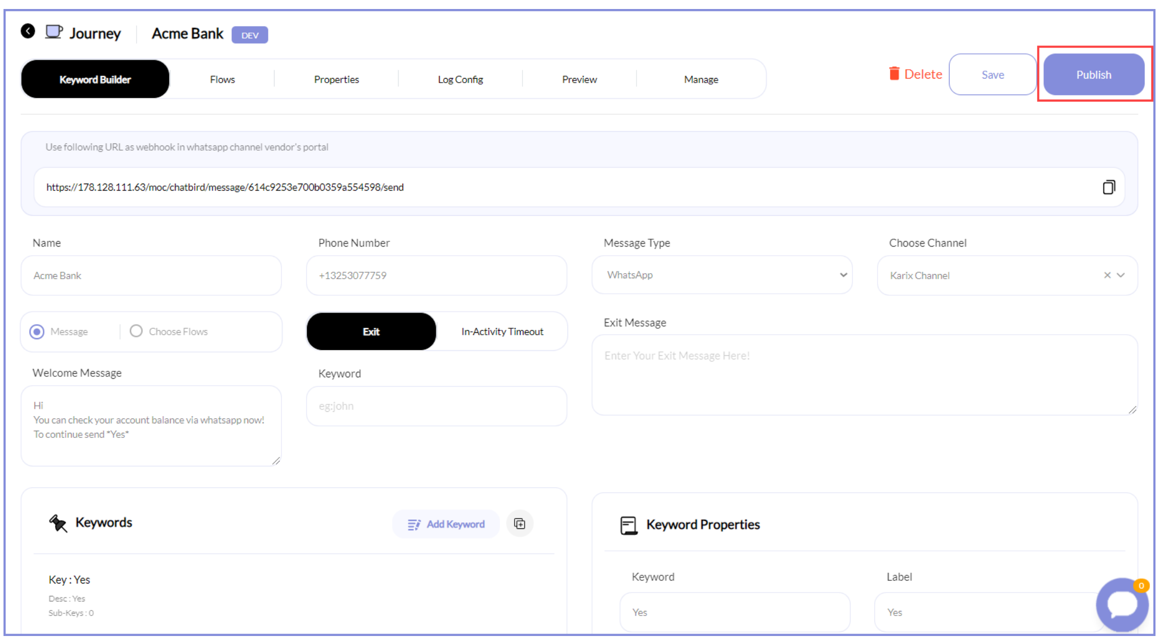
For this journey, We've used the Karix WhatsApp business provider. So, copy and paste this url in the Karix.io portal as shown below.

- After logging into your Karix account, paste the URL in the dashboard.
- Note that, this URL is configured to receive the inbound messages sent to your sandbox number.



- If you want to change the Webhook URL, click **Edit Webhook URL**.

3. After saving the flow, click **Publish** in **Keyword Builder** page to publish the WhatsApp Journey. You will get a success message "Published Successfully" if you have the published the WhatsApp journey successfully.



Published WhatsApp Journey

The customer can save the WhatsApp journey phone number in their contacts and initiate a conversation through WhatsApp.

They can merely say Hi and send the appropriate keywords as mentioned in the automated messages through WhatsApp to access the services offered by the enterprises.

In our example, send Hi to the bank's number via WhatsApp.

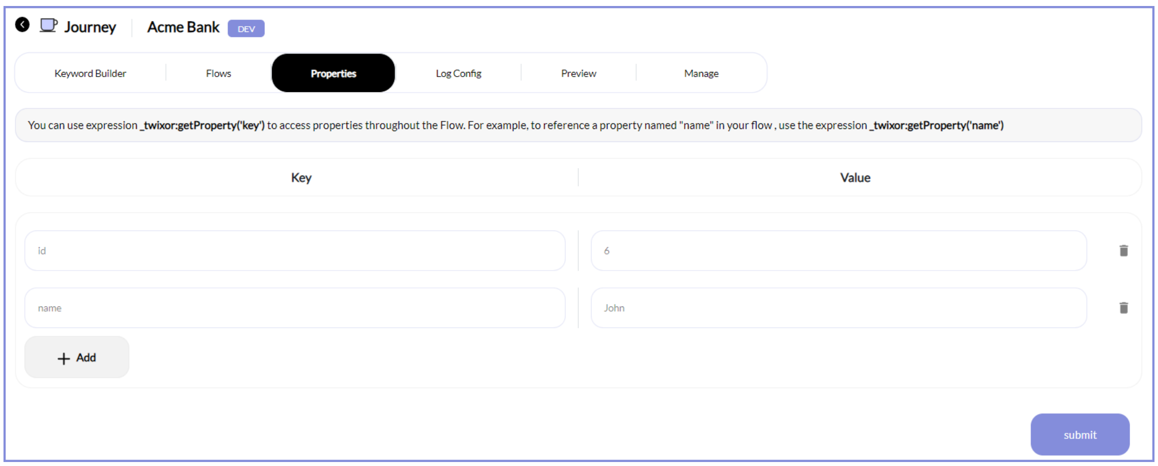
Properties

Click the journey to direct into Properties page to define the variable globally while you have creating the WhatsApp Journey. You can use these properties throughout the flow in every node.

The Properties can be manually updated by changing the Keys and Values in the Key-Value editor.

You can use the below expression to access properties

_twixor:getProperty('key')

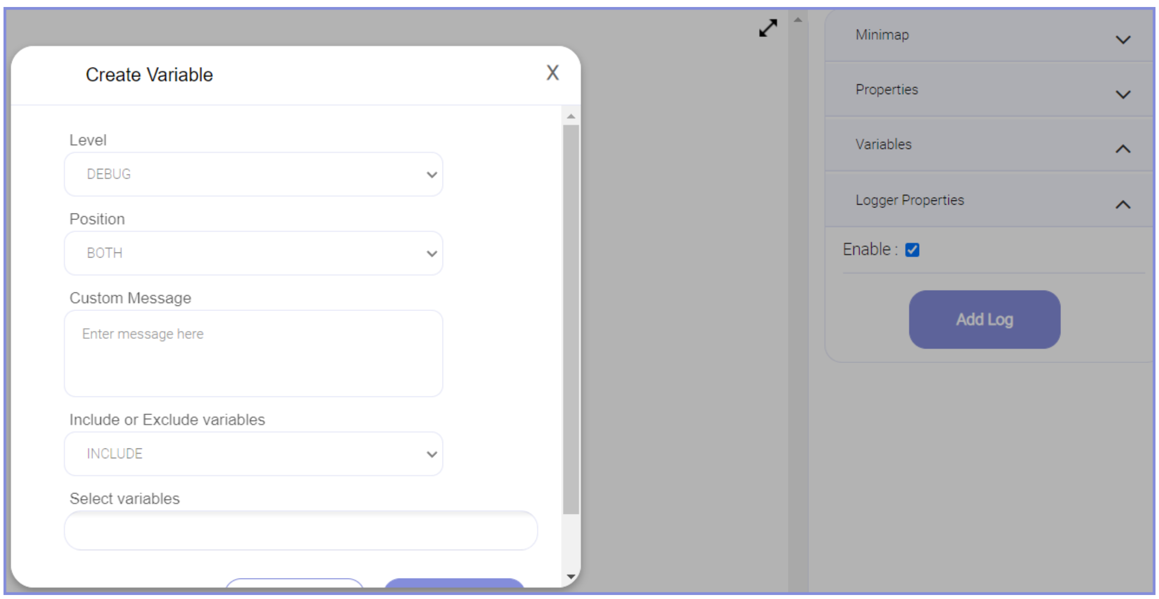


Log Configuration

Node Level Log Configuration

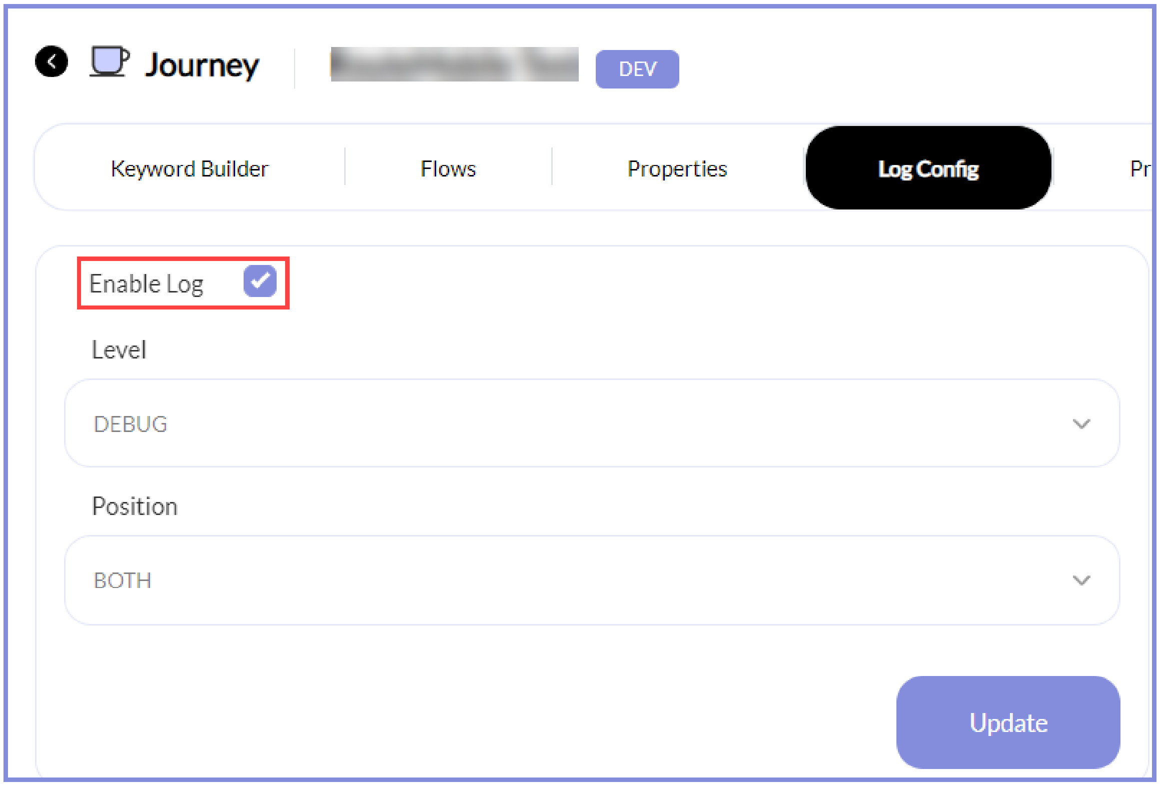
In WhatsApp Journey, add Logger Properties to each node which you want to configure the log.

1. Click the node and enable Log option available to the right of the flow designer.
2. Click **Add Log** option
3. Select the log levels in your application to look at the severity first. They are four levels of log – Debug, Info, Severe and Warning.
4. Select the node position to which the log to be configured.
5. Enter the Custom Message and select the variables which you want to include or exclude.
6. Click **Submit** to add a log property.



Journey Level Log Configuration

1. Enable the Log properties to filter the critical information about your journey flows and the one that is purely informative.



They are four levels of log – Debug, Info, Severe and Warning.

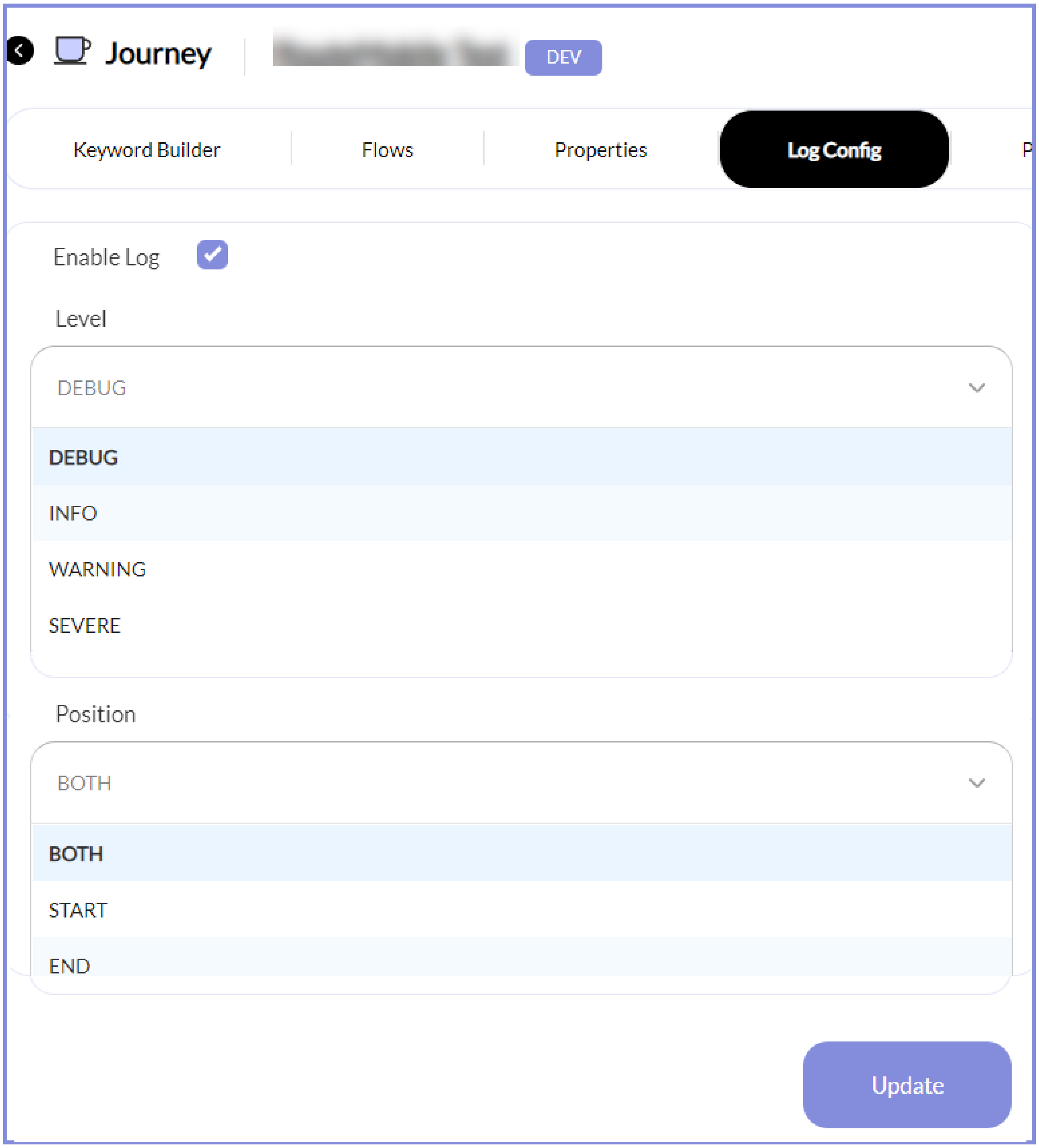
Levels	Description
Debug	It is used to fetch information needed to debug, troubleshoot, or test an application.
Info	An event happened, the event is purely informative and can be ignored during normal operations.
Warning	The WARN log level is used when you have detected an unexpected application problem.
Severe	The SEVERE level is a message level indicating a serious failure

2. Select the log levels to view the logs configured in flows to look at the severity first. For example, if agent selects the INFO level, all the nodes logged with info, warning and severe will be shown in Execution logs section. If user selects SEVERE, only the nodes with severe log will be shown.

Journey -Log Level	**Node's log**
DEBUG	Debug, Info, Warning, Severe
INFO	Info, Warning, Severe
WARNING	Warning, Severe
SEVERE	Severe

3. Select the node position to which the log to be configured and click **Update**.

The log details will be shown in the **Journey -> Execution logs** page.



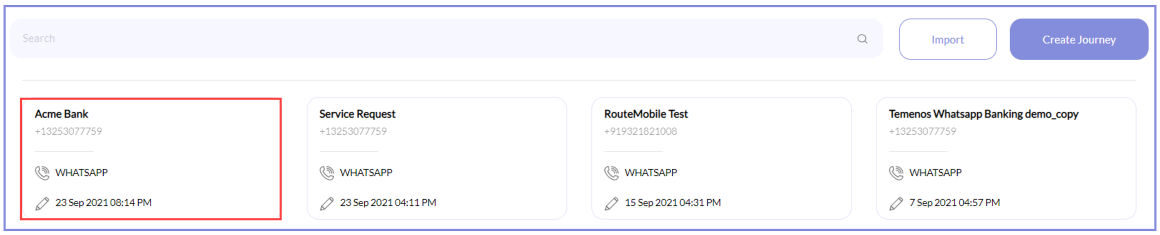
Preview WhatsApp Chat

You don't need to use the mobile device to test and preview the WhatsApp journey chat. You can do it within the application itself using this feature.

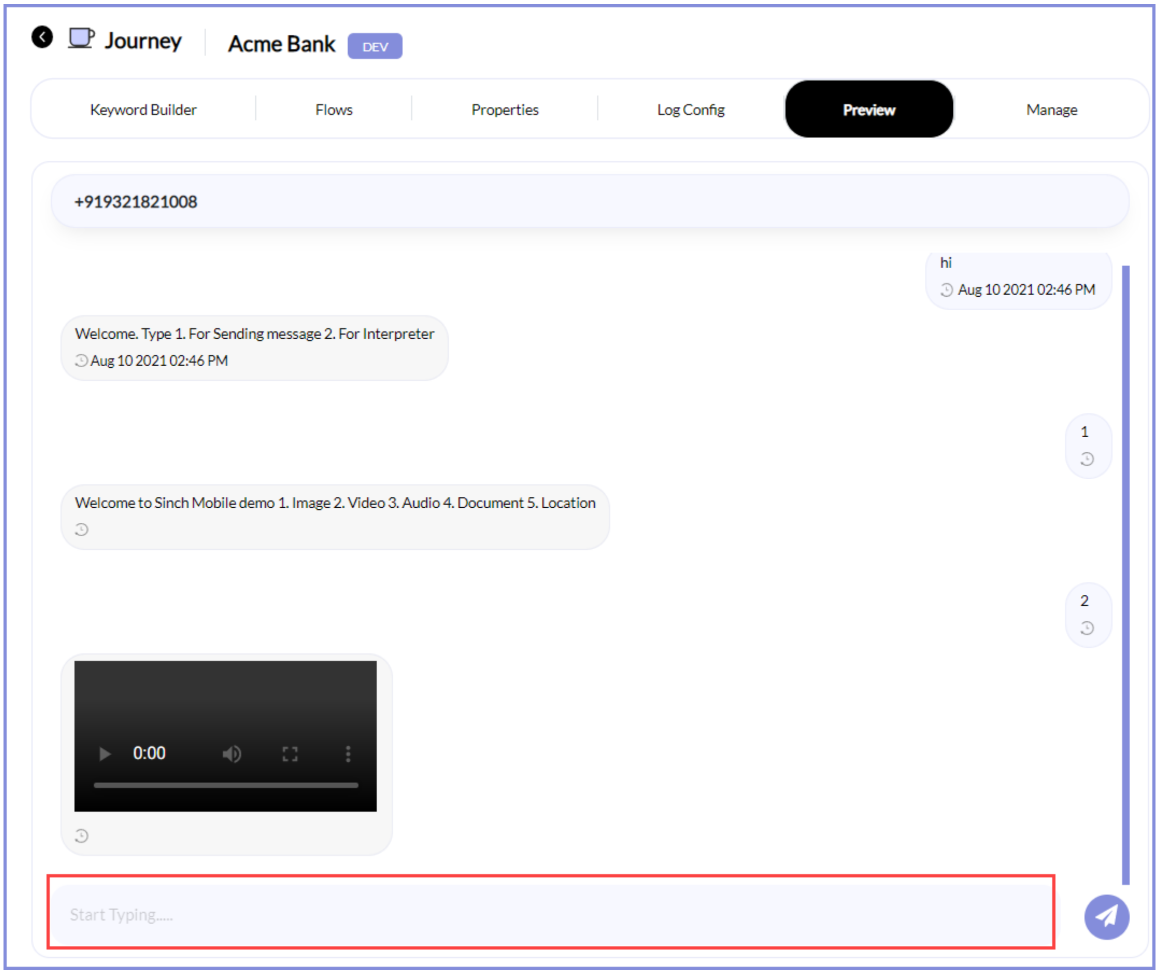
To view the journey chat flow within the application, follow these steps:

- Navigate to the **Journey** menu and select **Journeys**.

- Select the journey for which you want to preview and test the WhatsApp message flow. In this example, let's select the Acme Bank journey.



- Tap the **Preview** tab to type and send the message here and view the previous WhatsApp conversations of the selected journey.
- You can also type and preview the message here.


Journey
Acme Bank
DEV
Keyword Builder
Flows
Properties
Log Config
Preview
Manage
+919321821008
hi
Aug 10 2021 02:46 PM
Welcome. Type 1. For Sending message 2. For Interpreter
Aug 10 2021 02:46 PM
1
Welcome to Sinch Mobile demo 1. Image 2. Video 3. Audio 4. Document 5. Location
2
0:00
Start Typing.....

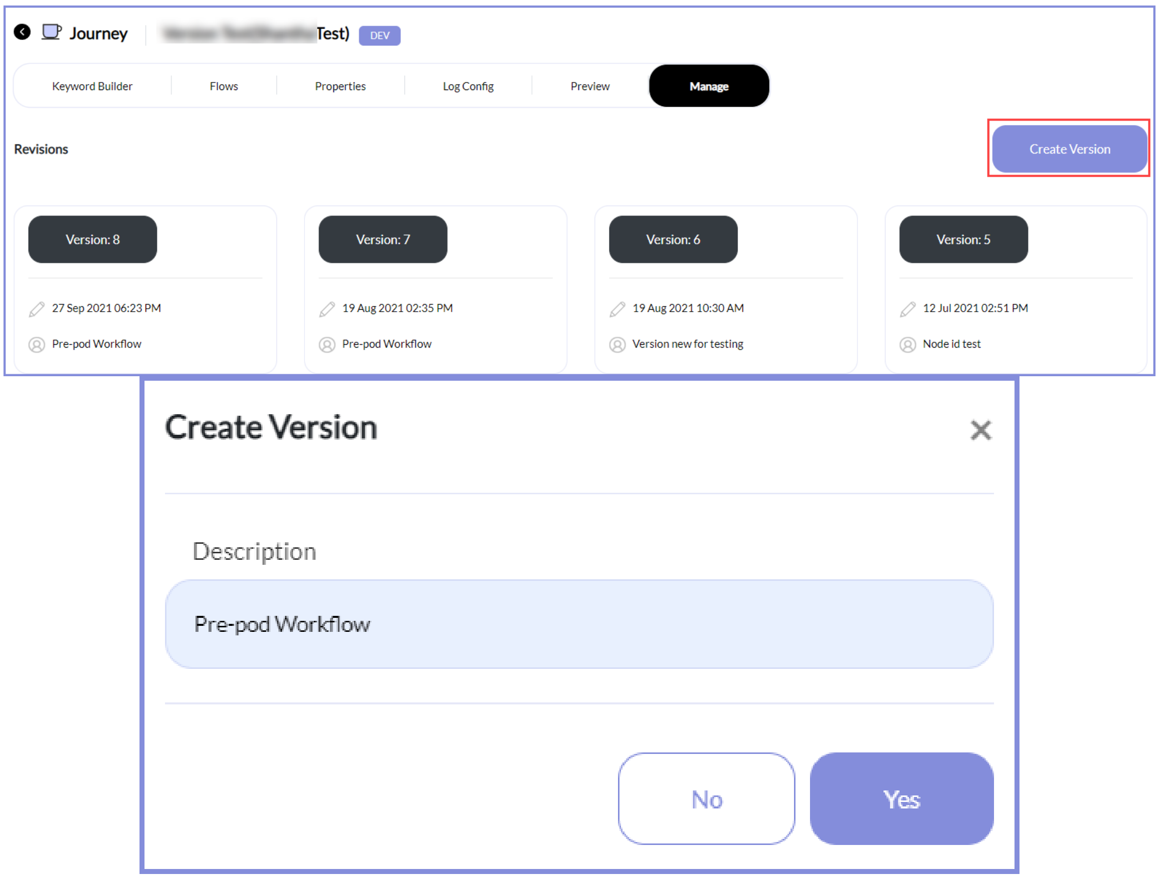
Manage WhatsApp Journey Versions

When designing the flow in WhatsApp Journey, you can use versions to freeze and publish the journey up to you have created.

1. Go to **Journey -> Journeys**

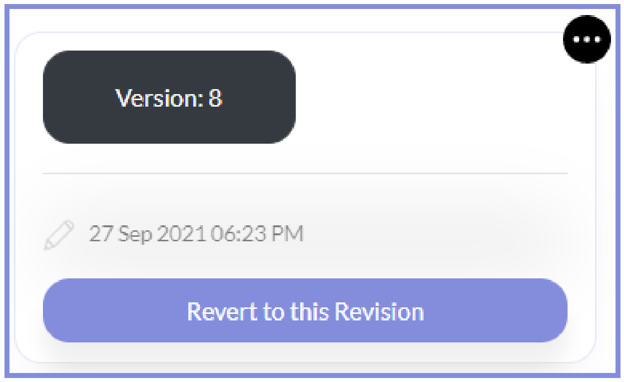
2. Select the Journey which you want to create the version and click Manage tab.

3. Click **Create Version** button. Enter the description for a version and enter **Yes** button.



4. Now, a copy of journey will be saved under Manage section with version number.

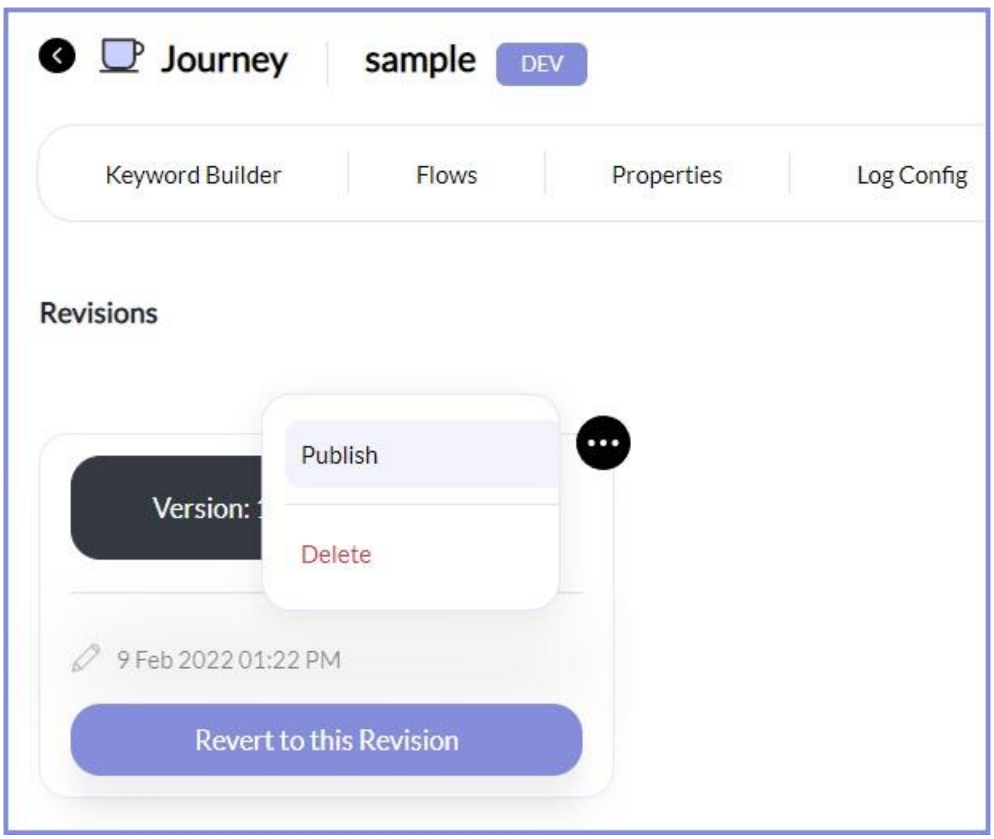
5. You can Revert any version to development environment again to develop by clicking **Revert to this Revision.**



How to Publish the Journey to Pre-prod and Prod

Here, you can publish the journey to pre-prod and prod by selecting the version which you have created.

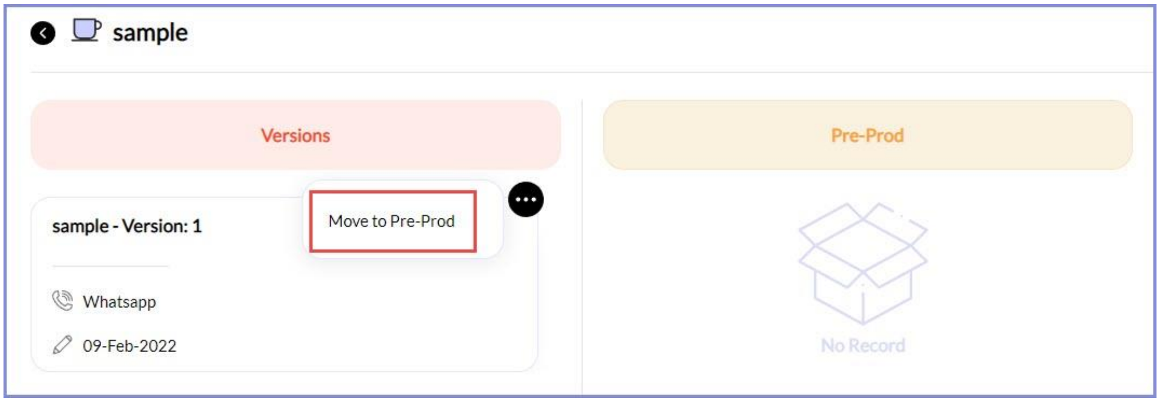
1. Select the version which you want to publish and click **Publish** button.



2. The selected version will be moved to pre-prod environment.

3. Or, you can also move the version to pre-prod by navigating to **Publish -> Journey**. In Versions Column, click ⋯ icon -> Move to Pre-Prod and click **Submit** button.

Info! The journey can be moved from dev to pre-prod and then to production environment.

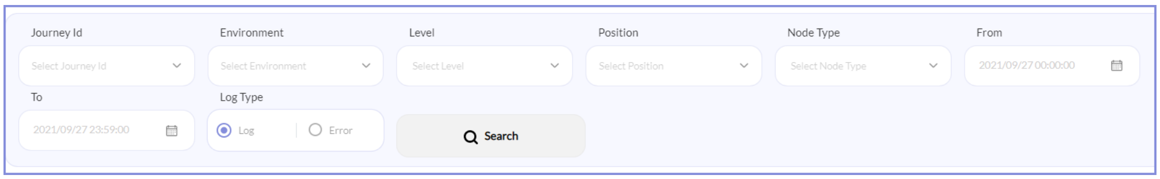


4. Publish the selected journey to production environment by clicking **Move to Prod** in Pre-Prod Column and click **Submit.**

WhatsApp Journey Execution Logs

The Execution Log displays useful information about currently ongoing and completed executions. It's a useful tool for debugging executions, or to quickly look at the result of past executions.

Look out the Execution Logs page of Twixor WhatsApp Journey that provides you the elaborated record of logs and errors.



Journey Id – Name of WhatsApp journey which you have created

Environment – Environment which the journey is published

Level – Select the log level

Position - Select the node position to which the log to be configured

Node Type – Choose the type of the node used in the flow

From and To Date – Select the date to view the logged details

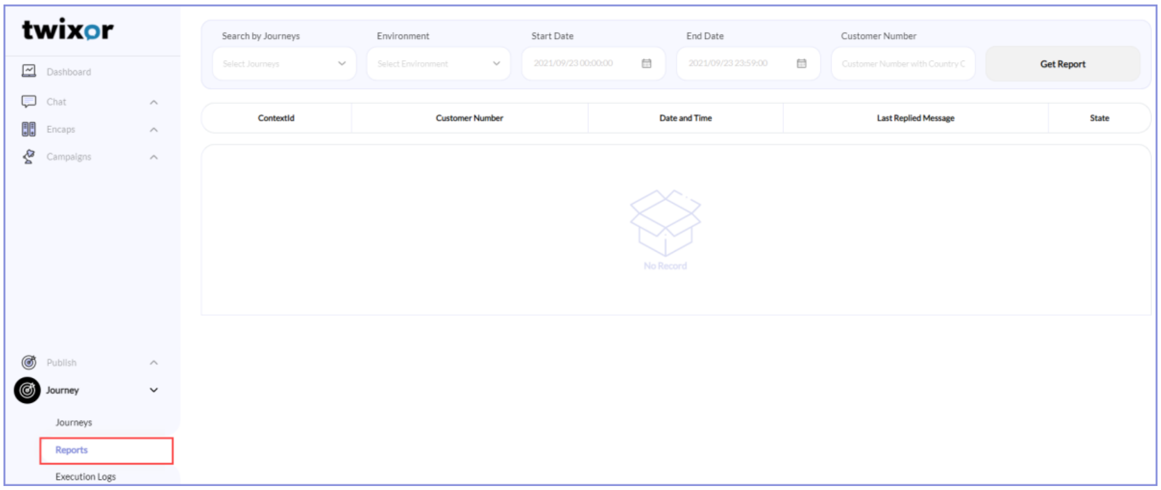
Log Type – Choose the log type as Log or Error. Logs are configured in Journey -> Log Config page. By default, all the system generated logs are viewed in Errors. Agent can use these errors to debug what went wrong and when.

WhatsApp Journey Report

This journey report gives you a detailed view of the staggering messages sent and received across the WhatsApp.

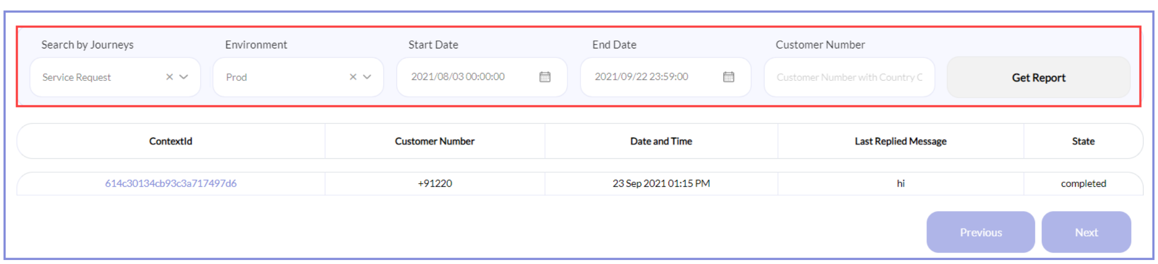
This allows the business to track the journey performance sent over the WhatsApp.

To view the WhatsApp Journey Report, navigate to **Journey->Reports**.



Search by Journeys

You can view the detailed WhatsApp report by searching the WhatsApp journeys based on the **journey name**, **environment**, **From Date** and **To Date** between which the messages are sent and received, and **customer number with country code**.



This report contains the following details:

A unique context Identifier (Context Id) for each conversation with a user. Click **Context Id** to view the detailed **context report**.

Mobile number of the customer

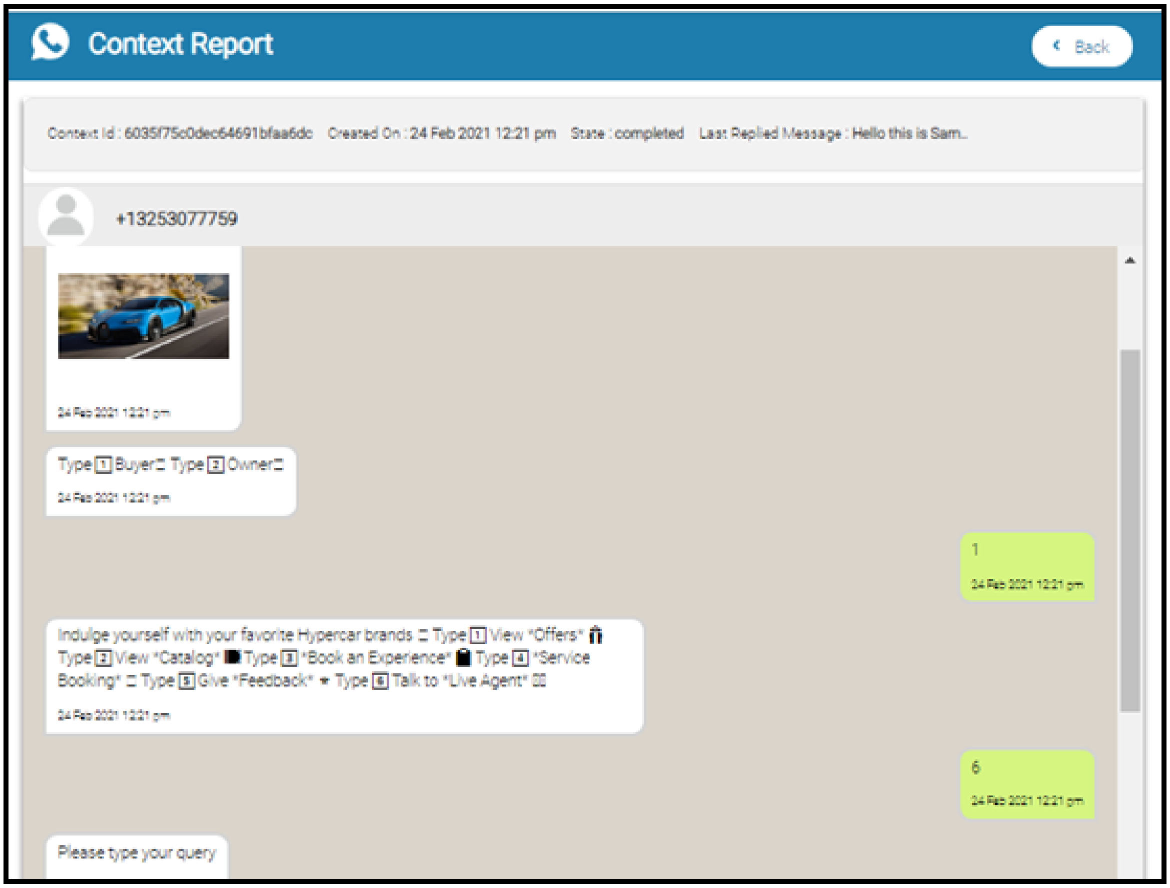
Date and Time on which the conversation started across WhatsApp

Last Replied Message of the customer

The **State** of the conversation (Valid Values: Waiting, Chatting, Completed)

Context Report

Using Context Report, you can view the flow of the conversation between agents and customers.



Admin

Overview

The Admin role allows the designated Admin user to control the degree of user access permissions. They can create key records, include enterprise structure, and manage accounts of all other users. In Twixor EnCaps, an admin can configure their **Enterprise Details**, **Manage users**, **Administer Departments**, and **Configure the Channels** for delivering EnCaps.

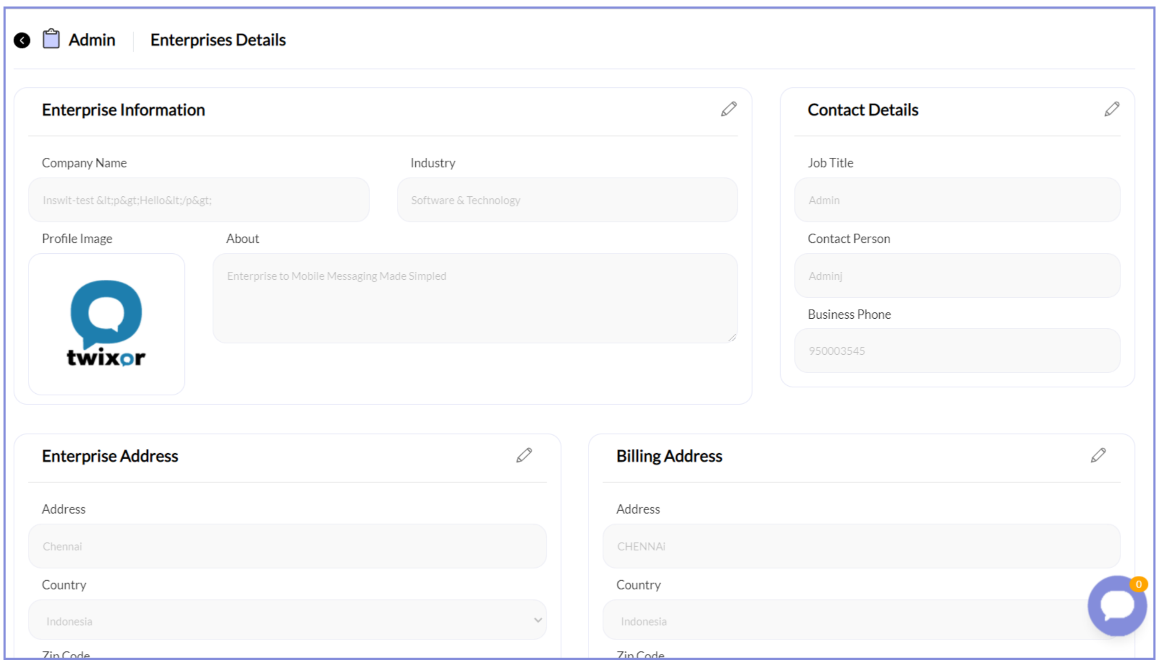
Configure your Enterprise Details

You can give an introduction to the solutions, services, and the actual position of your company to your stakeholders and prospective customers here. So, a well-drafted profile can be helpful to distinguish your enterprise from others.

Use these steps to create your enterprise profile in Twixor EnCaps.

Navigation: Admin->Enterprise Details

Click on the relevant headings to view or edit your enterprise profile.



1. Give information about your firm under **Enterprise Information**.

- Enter the **Company Name** of your enterprise.
- Select your enterprise vertical from **Industry**. Remember that Twixor EnCaps can be employed across antithetic horizons.
- You are making the possible way to make first best impression on your customers by giving an attractive **Profile Image**.
- Draft clear and concise organization manifesto while writing **About** your company.

2. Enter your **Enterprise Address** and the **Billing Address** connected to the specific type of payment like credit or debit card. Click **Save** to save your company address.

3. Type the **Contact Details** of a person to handle any questions or concerns.

- Type their designation in **Job Title**.
- Enter the name of an executive who hold the power of decision making in your organization.
- Key in the word-perfect official phone number in **Business Phone**.
- Click **Save** to save the information.

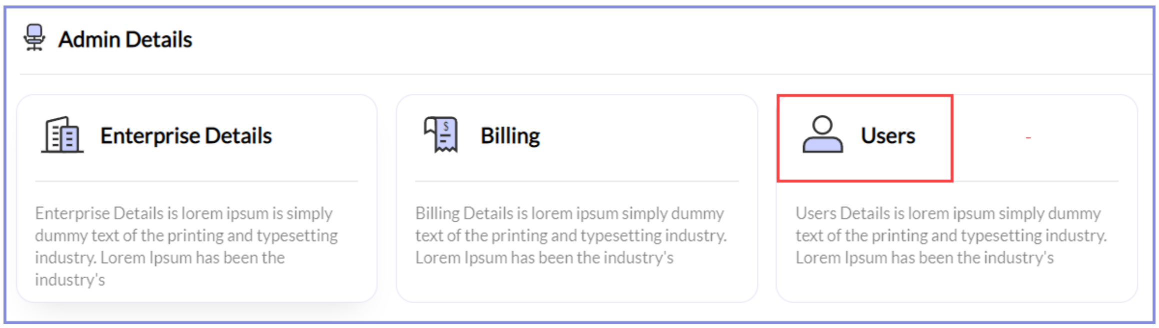
You may also edit your Enterprise Profile and available Permissions by clicking .

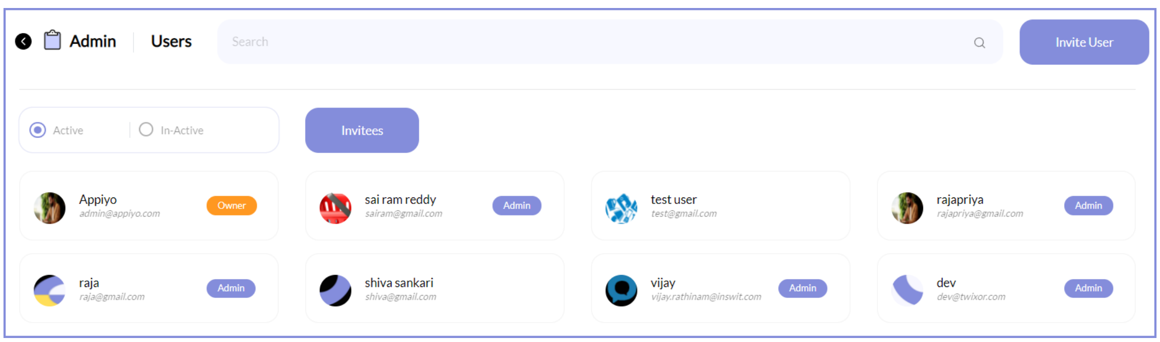
User Management

In this page, the administrator users of the enterprise portal can be created and deactivated. And, Admin can be able to assign permissions or roles to other users.

Navigation: Admin->Users

The list of users are displayed in the **Users page** as shown below:



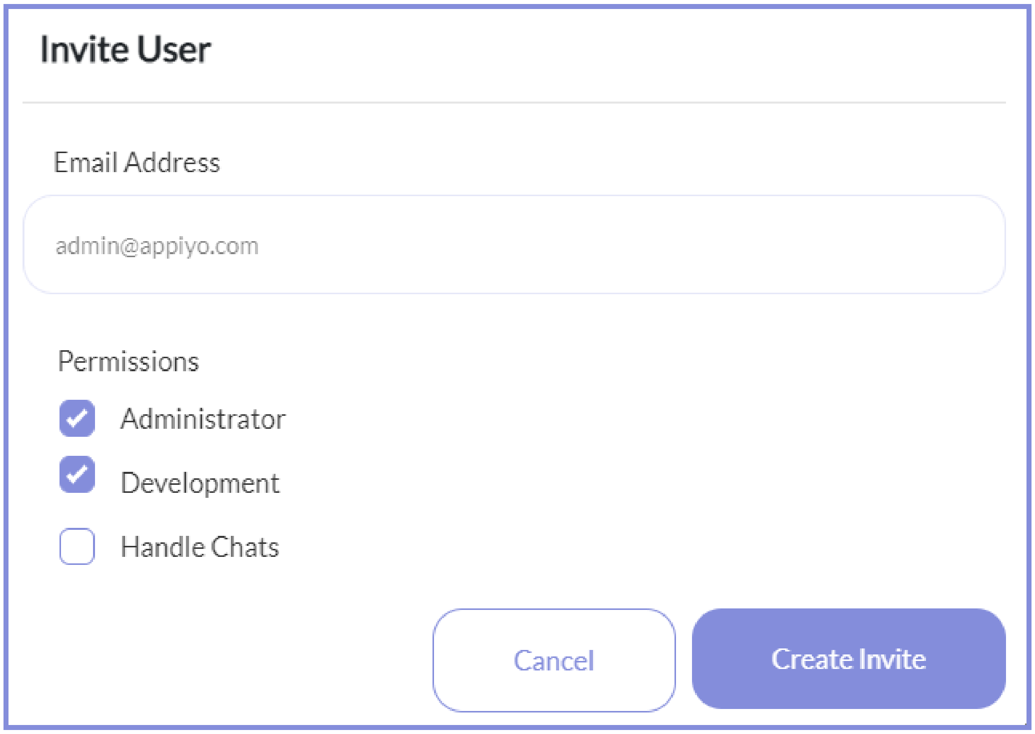


Invite the users

Pursue the steps below to invite a new user.

1. Click **Invite User** to create a new user.

2. Enter the legitimate **Email id**.

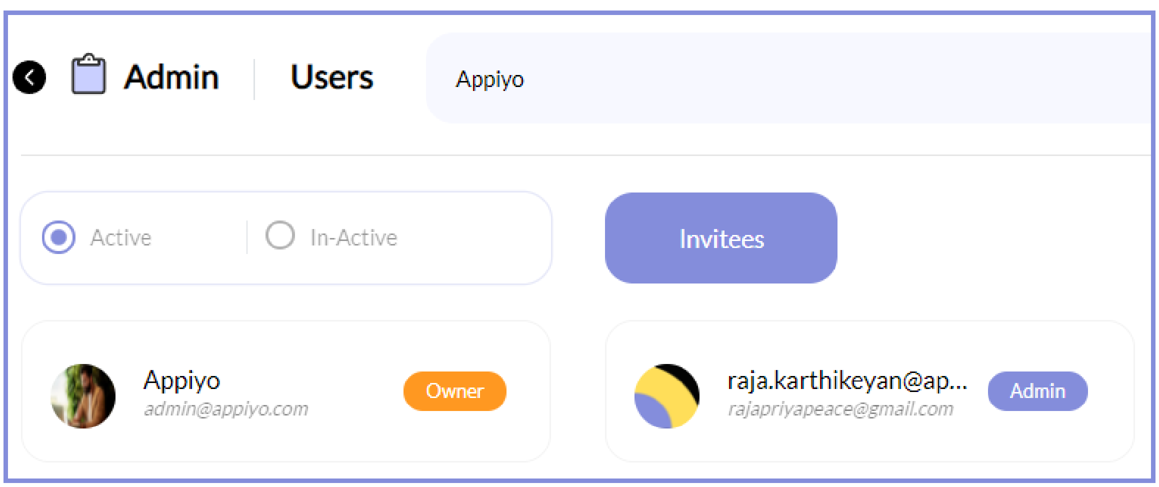


3. Assign the user permissions (by selecting the respective options) to **development**, **handle chats**, and to perform the **role of administrator**.

4. Finally click **Create Invite** to invite the user or **Cancel** to abolish the creation process.

Search the users

Search by name search bar lets you to explore the user based on their names.

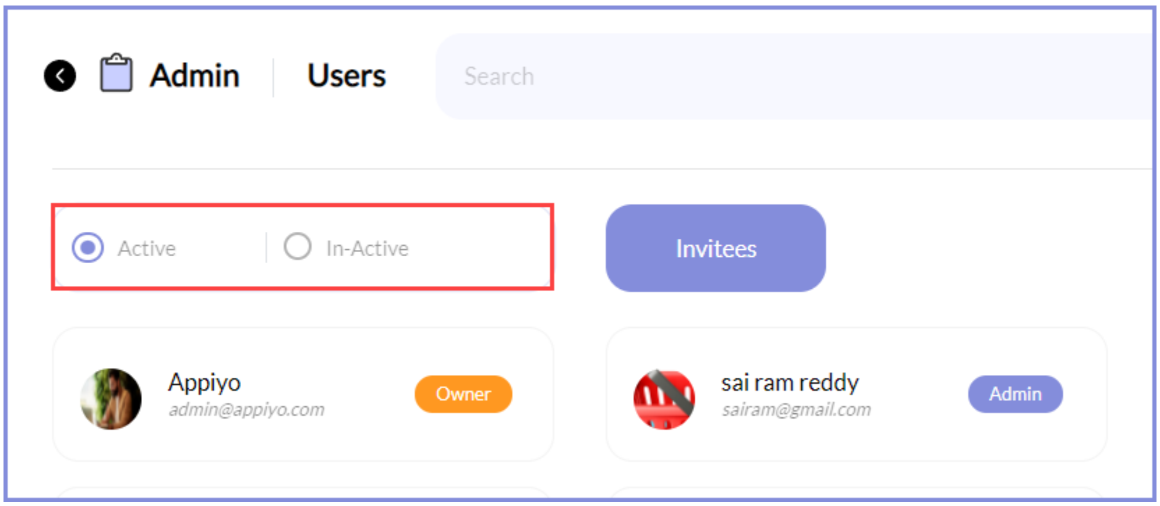


Filter the users

The users can be restrained based on their availability i.e **Active Users** and **In-Activat Users**.

1. Click **Active Users** to view the users who are progressive.

2. Select **In-Active Users** for filtering the users who are deleted by the Administrator.



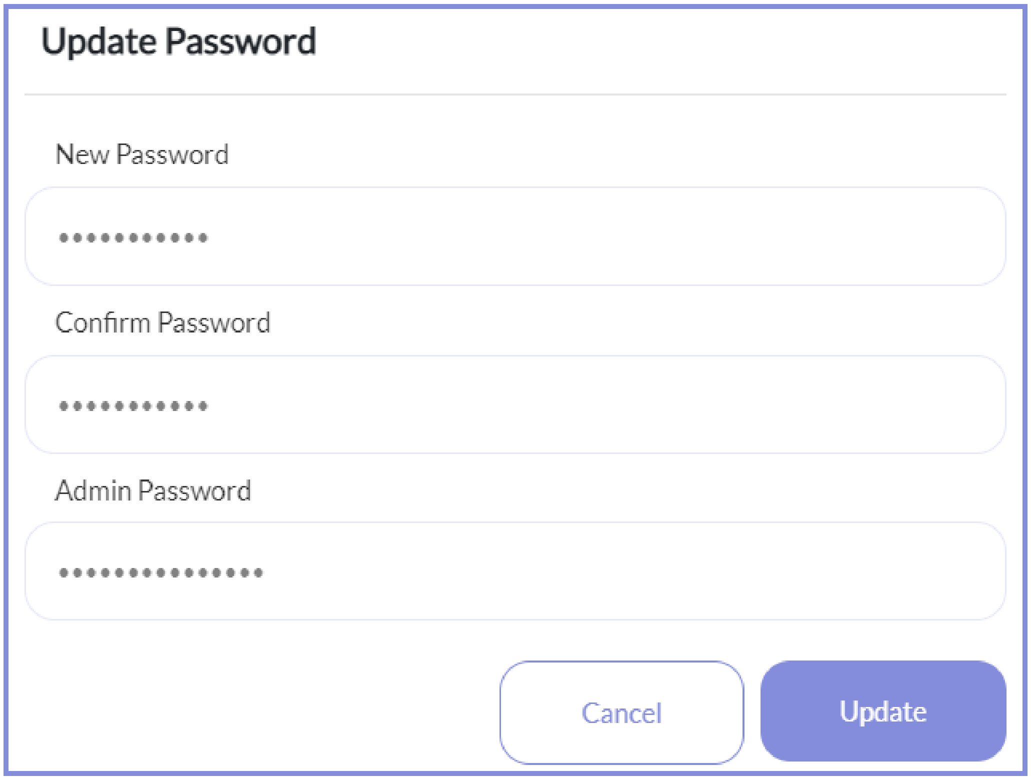
Edit the User Profile

Click the user to modify the password and permissions for the user.

Resetting the Password

To update the password of the users, follow the steps below:

1. After clicking the user, click **Change the user's Password** in the **Reset Password** section.



2. Provide **New Password** and **Confirm Password** the password in the **Update Password** dialog box.

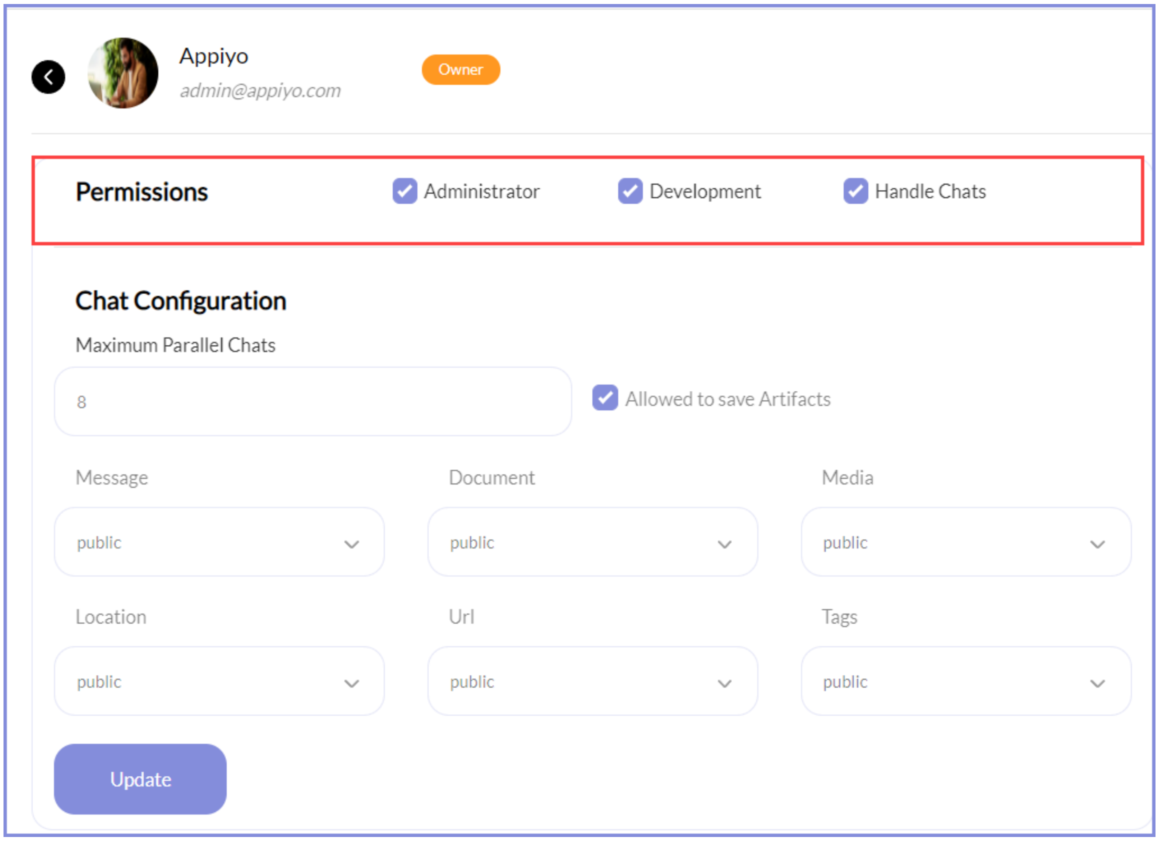
3. Enter the **Admin Password** since it is mandatory to renew the user password.

4. Click **Update** to alter the password.

Modify the User Permissions

The assigned permissions for the user can be modified in the **Permissions** section.

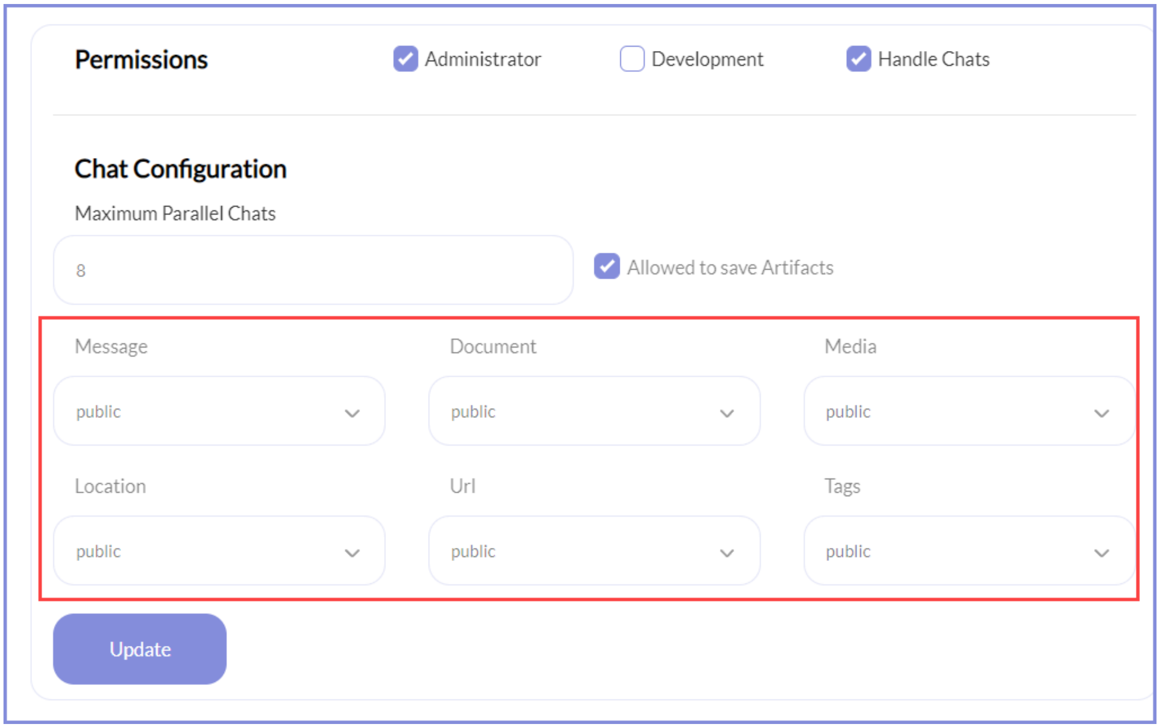
The permissions can be modified by checking/unchecking the **Administrator**, **Development** and **Handle Chats** user permission options and click **Update** button.



Chat Configuration

If you enable **Handle Chats** permission, enter the **Chat Configuration** settings.

- Enter the maximum number of concurrent chats handled by the agents in **Maximum parallel chats**. By handling parallel chats, agents can quickly solve the queries of the customer and the cost per chat session can be reduced.
- Click **Allowed to save Artifacts** to allow the agents to add the artifacts in the message they sent.



- Then assign the permissions (**Public**, **Private**, **None**) to access the artifacts (**Message**, **Document**, **Media**, **Location**, **URL**, **Tags**).
- Select **Public**, **Private**, or **None** options next to the Message, Document, Media, Location, URL, or Tags to assign the respective permissions.
    - Select **Public** to share the artifacts with all other agents in the organization.
    - Click **Private** if you want to make the artifacts personal and don't want to share it with other agents.
    - Choose **None** if you don't want to save the artifacts.

These permissions will be reflected in **Departments**. Go to **Admin -> Departments** to add the private artifacts. These private artifacts can be added only to the departments belonging to this user (user **signed in** currently).

> **Info!** Only the **administrator** and **owner** privileges of the enterprise will be able to assign the permissions to other users

Deactivate the Users

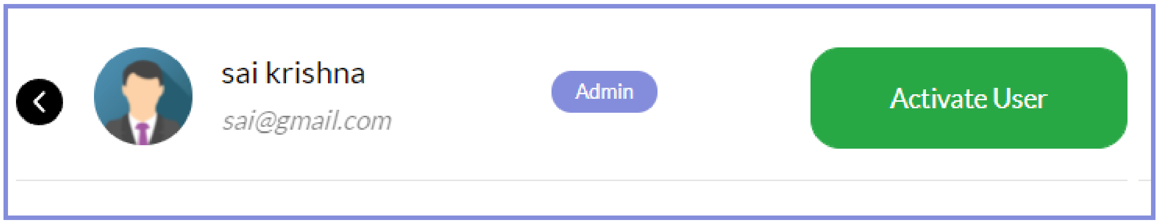
1. Click 

next to the user whom you want to disband or remove.

2. Click **Deactivate** to delete and make the user inactive or **Cancel** to invalidate the process.

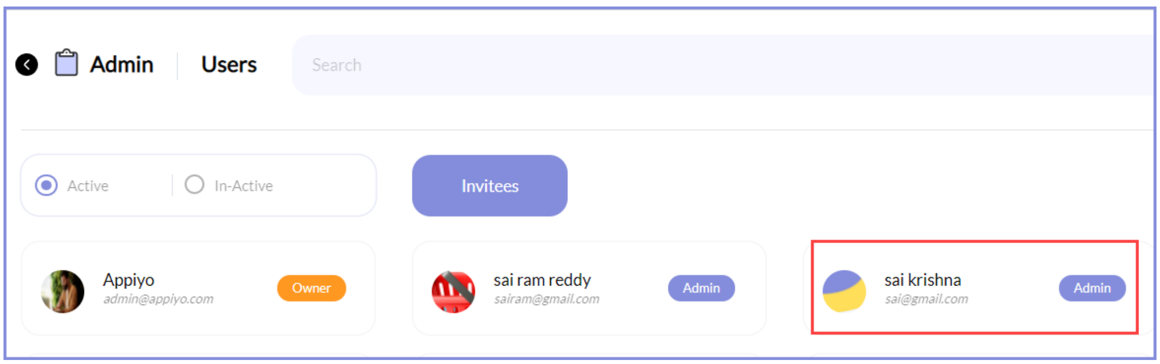
Activate the deleted users

1. **Filter** the deleted user by selecting the **In-Active** radio button option.



2. The deleted user can be re-activated by clicking the **Activate user** option available in the list of deactivated users.

In the example given above, the user sai krishna is reactivated and displayed in the Users page.



Administering Departments

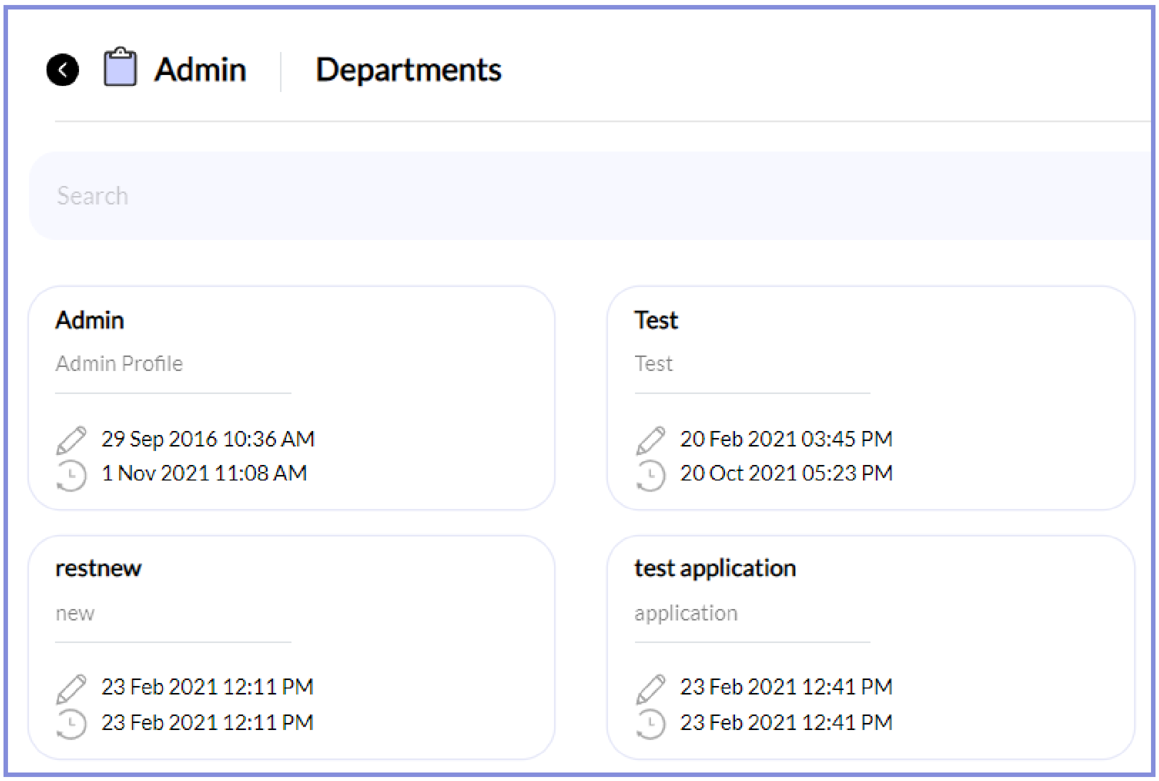
Only people who are registered as Enterprise Users have the right to access the portal. Those users can be organized into departments.

Each department have a dedicated set of users. The type of activities that users can perform and the interface which users see is determined by their roles. Every user in the enterprise has different roles. You cannot have the best of both worlds. Hence, they are grouped into departments based on the parts they have.

In Departments, you can create a new department and associate the agents to that department before beginning the chat session.

Creating, Editing, and Deleting the Department

If you want to view the list of created departments, go to **Admin->Departments**.

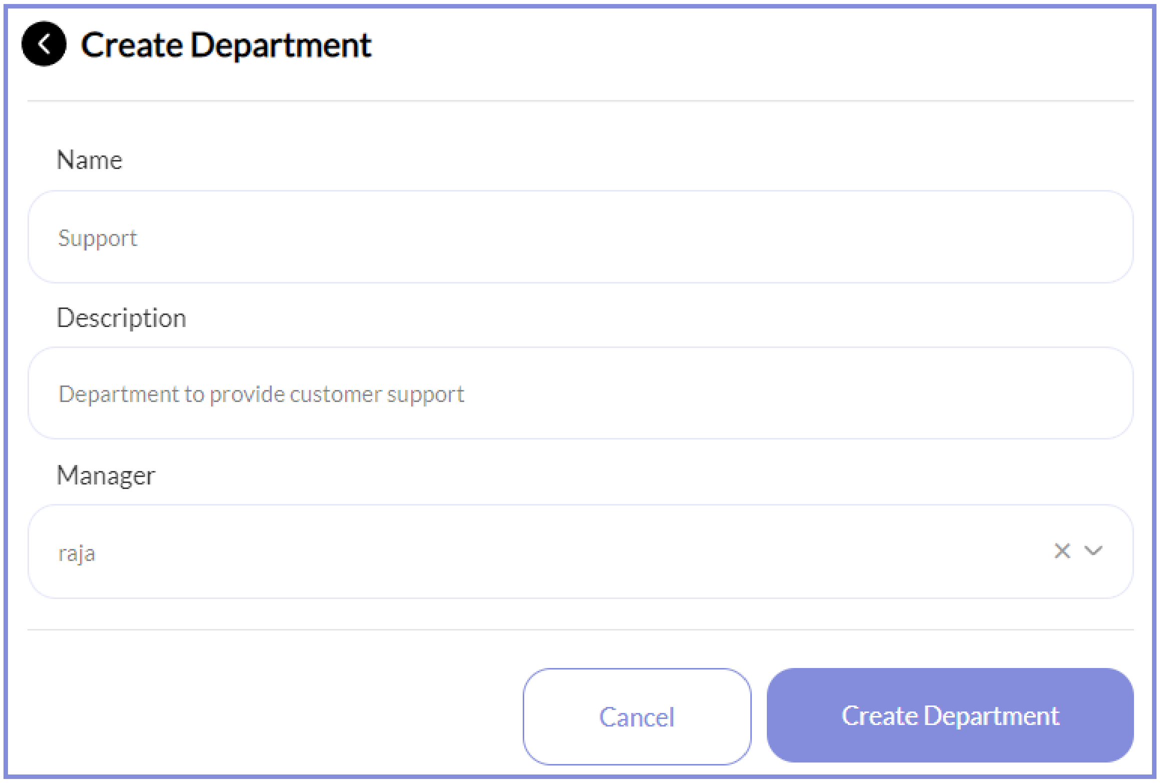


Meanwhile, you can create and edit the departments that will be illustrated in the accompanying sections.

Create a Department

Precede the steps below to create a department

Navigation: Admin->Departments->Create New Department



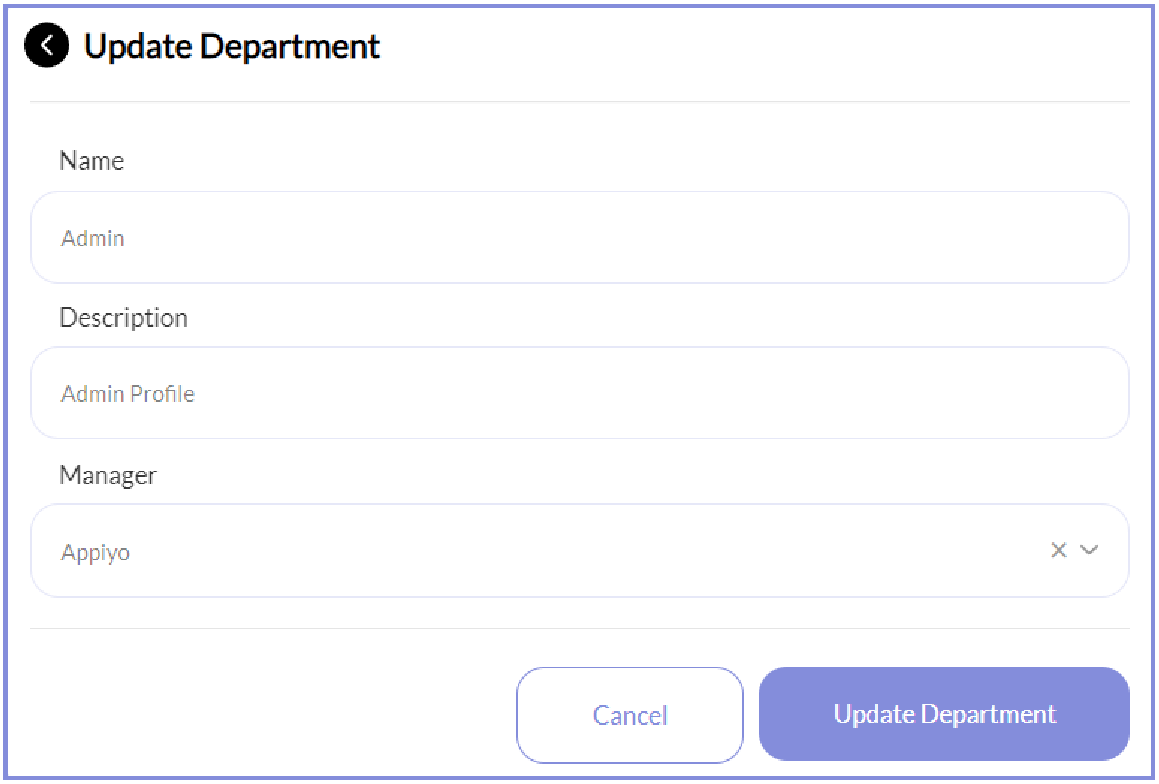
1. Type the department **name** and **description** for the department.

2. Select an agent from the list to operate as a **Manager** of the department. Refer User Management guide to create users of the department.

3. Finally, click **Create Department** to create the department.

Edit Department Details

To alter the name, description, and manager of the department, click Edit button of the selected department.

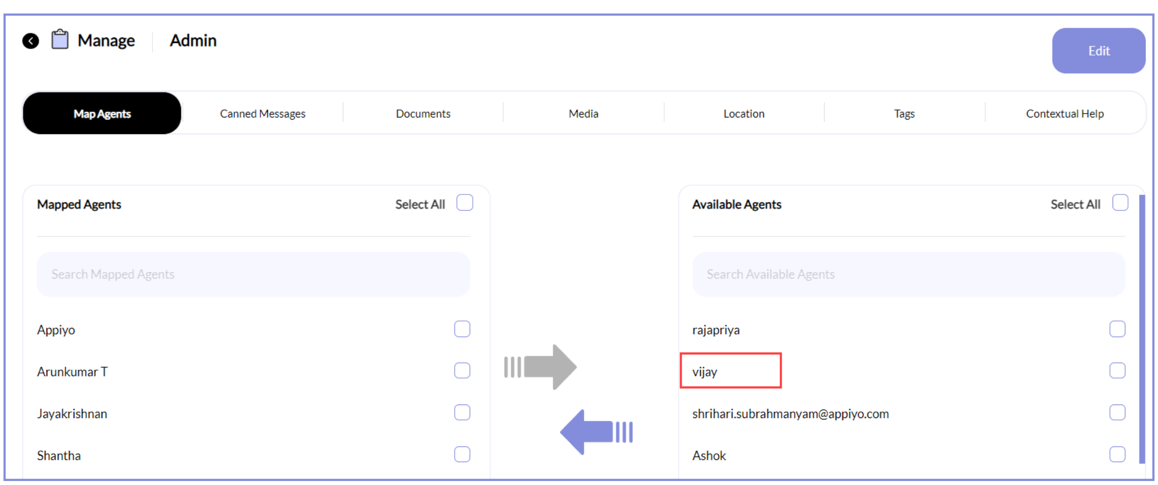


To search the department based on their name, key in the department name in **Search** explorer.

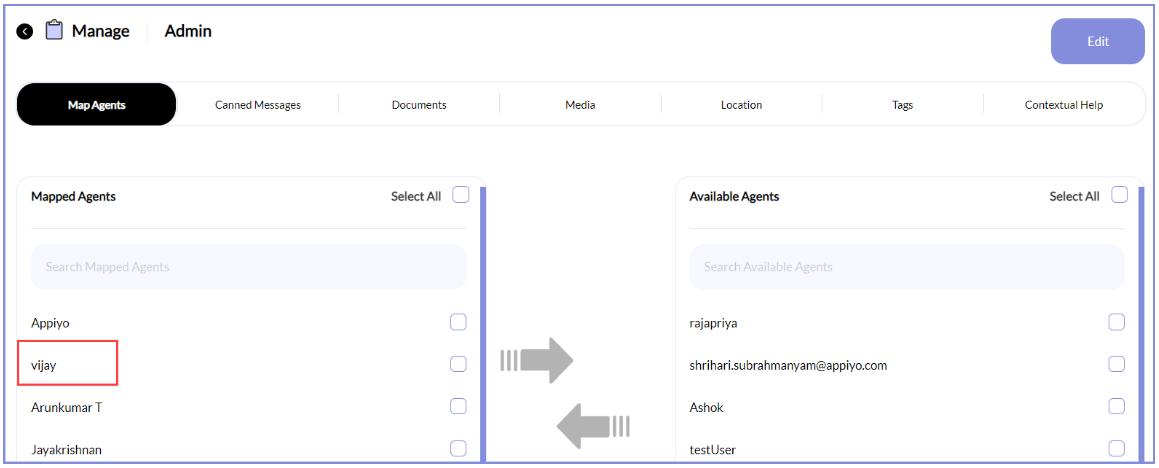
Mapping Agents to the Department

1. To depute/ map the agents to the department, select **Map Agents** option next to the department name you want to assign.

2. Select the agents from **Available Agents** and map them to the department and click . In the screen-shot shown below, agent Vijay is selected to be mapped.



3. Then the agent name will be displayed in the **Mapped Agents** section if the agent is mapped to that particular department.



Adding Artifacts

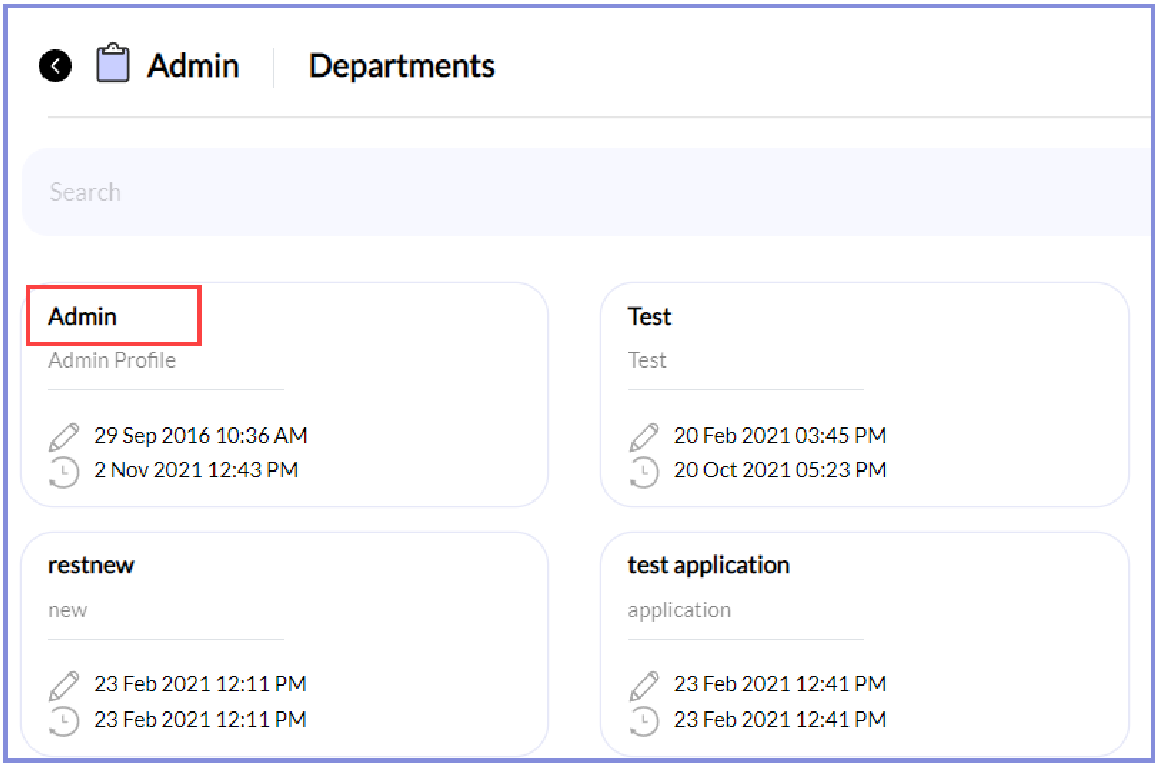
You can pre-upload the artifacts like **Canned Messages**, **Documents**, **Media**, **Locations**, **Tags** and **Contextual Help** to the concerned department so that the agents belonging to these departments can send the rich media to the customers while chatting with them.

These public artifacts can be added at the department level and can be sent by all the agents of the selected department to the customer across **PWA** and **WhatsApp** channels.

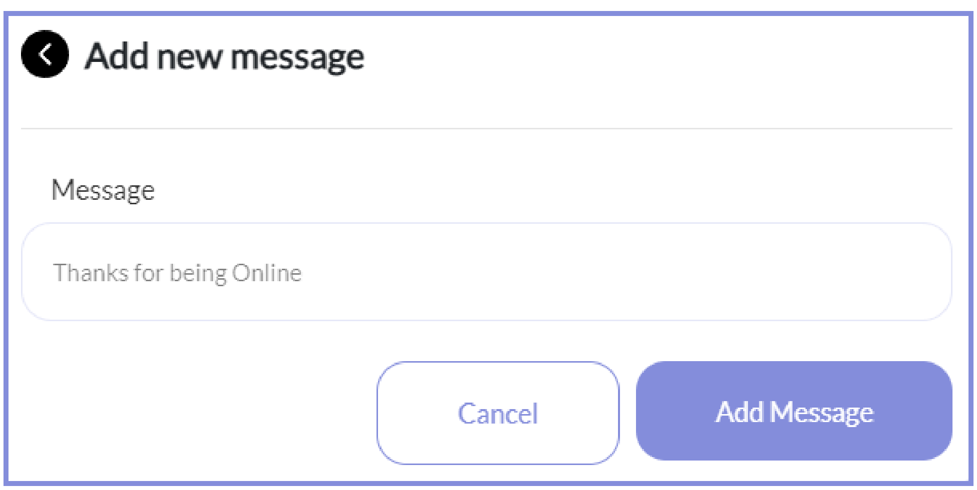
Add the Canned Message

Pursue these steps to add the canned message:

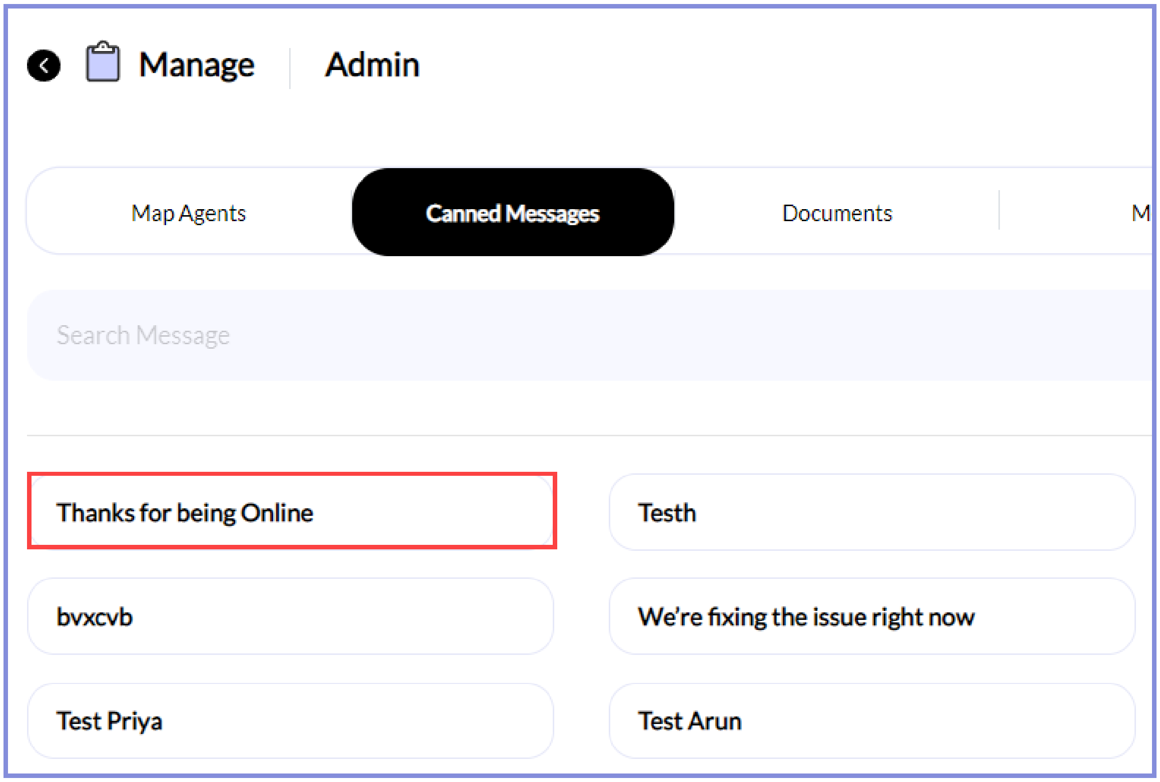
- Navigate to **Admin -> Departments**.
- Select the department to which you want to add the artifacts. Let's select the Admin department in this example.



- Click **Canned Messages** tab to enter the template message that can be used to answer the common queries of the customer with a standard reply.
- Click **Add Message** button and enter the message template for canned message as shown below.



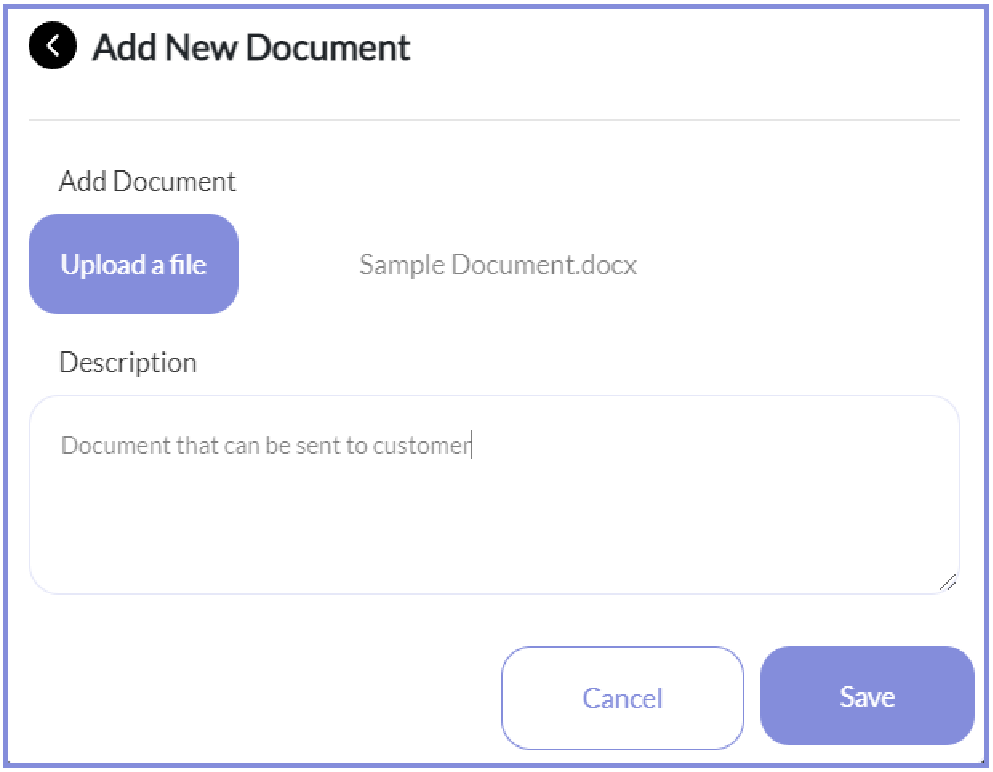
- Click **Add Message** to save the template message.
- Once the canned message is saved, it will be added in the list as shown below. It displays the details like the date on which the message has been created and the user who have created this message.



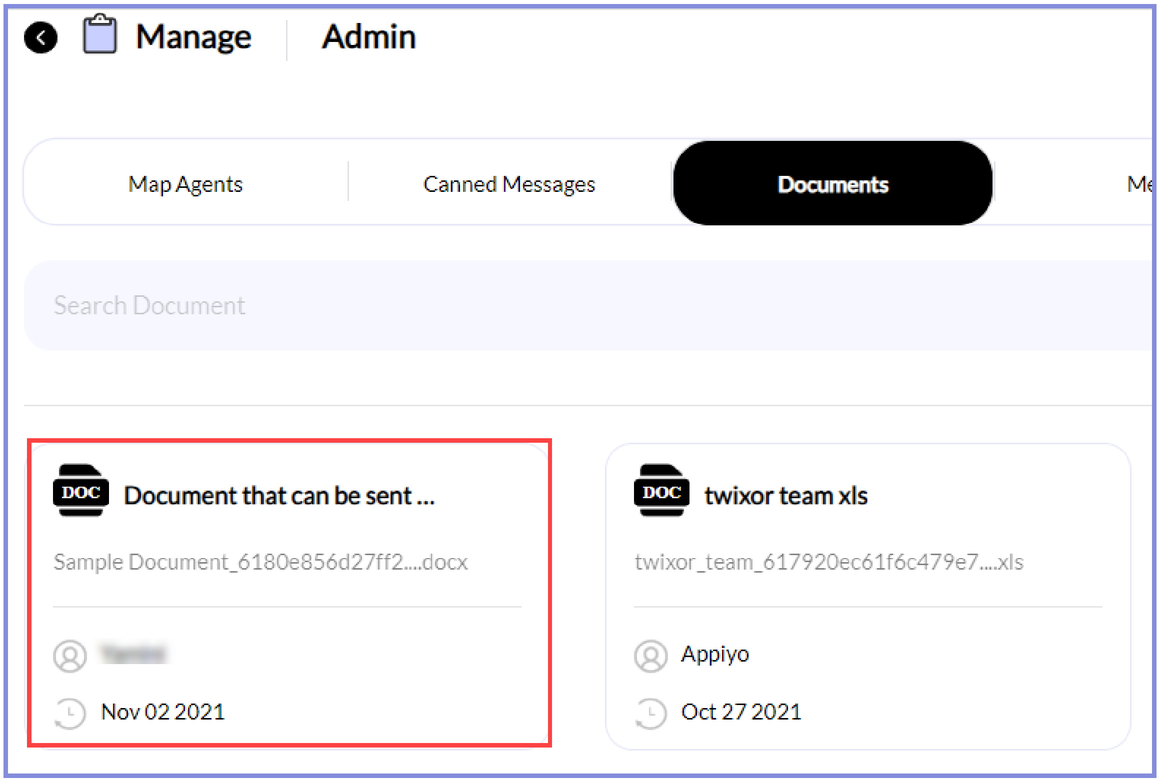
Add the Documents

To add the documents, follow these steps:

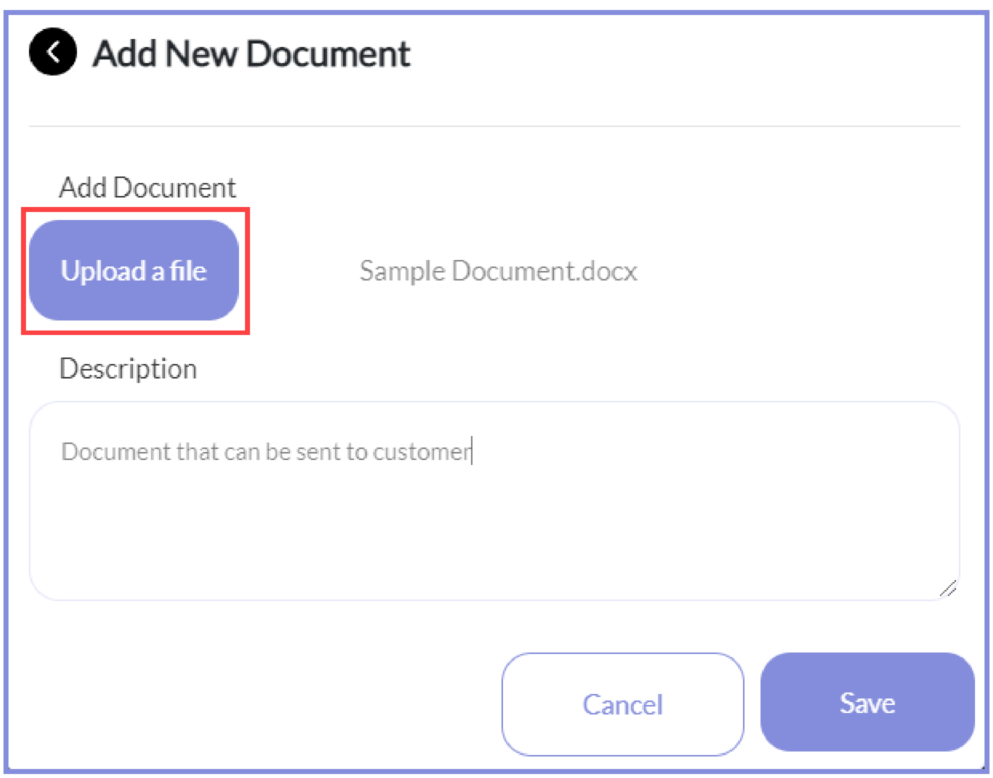
- After selecting the department from **Departments** page, click **Documents**tab. In this example, we have selected the **Admin** department.



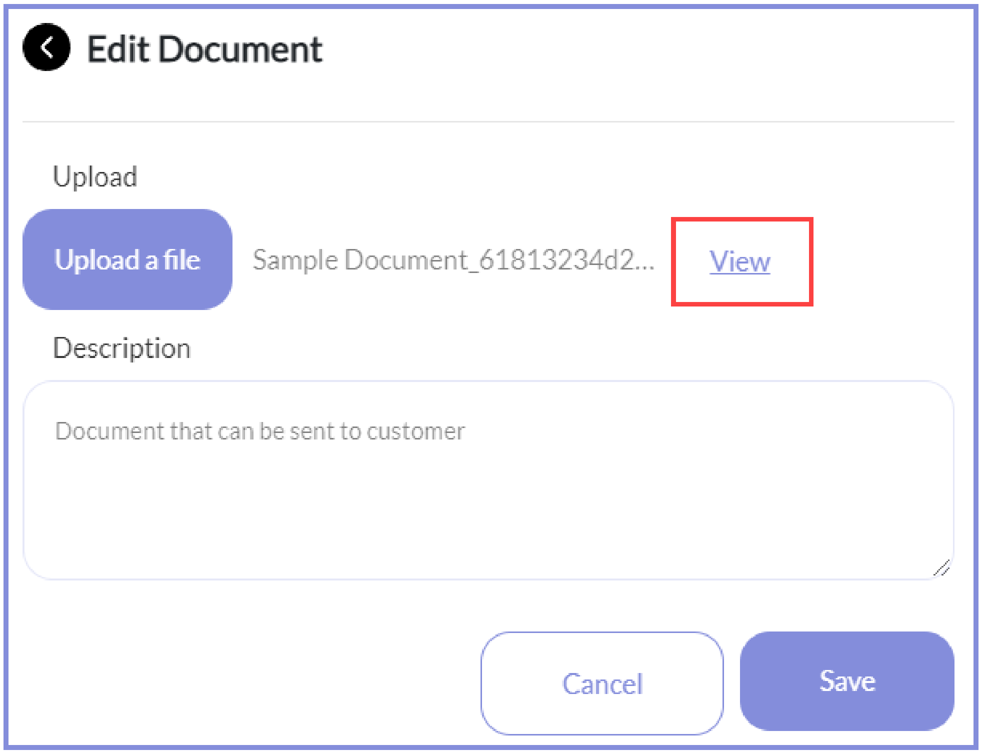
- Click UploadSelect the file from the local drive and enter the **description** for the document.
- Click **Save** to save the document. This document will be displayed under the **Documents** panel.



- Click **Upload File** to open a new file. Select the file to be replaced from your local computer and click **Save**.

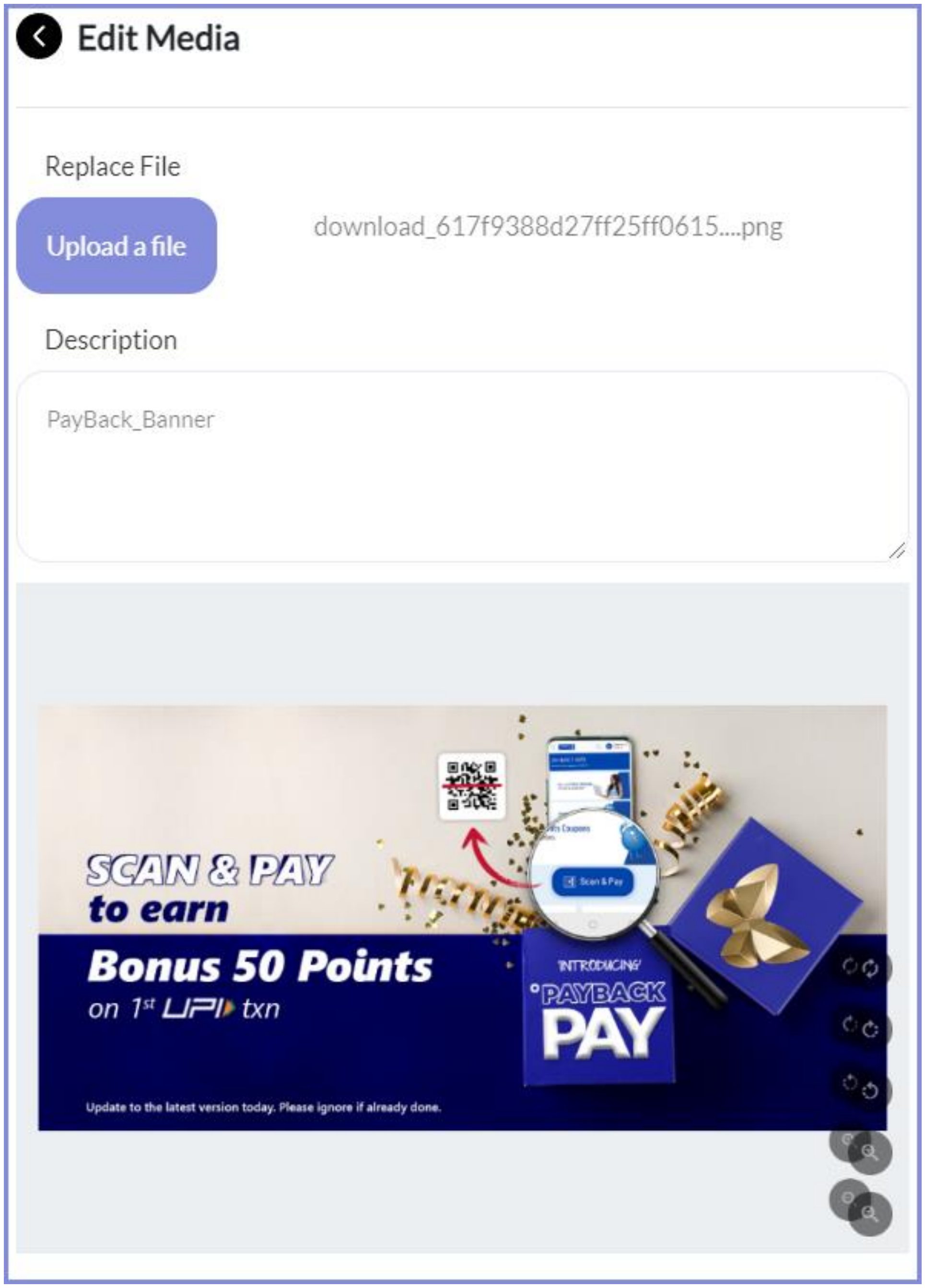


- Click the **View** to download the uploaded document.

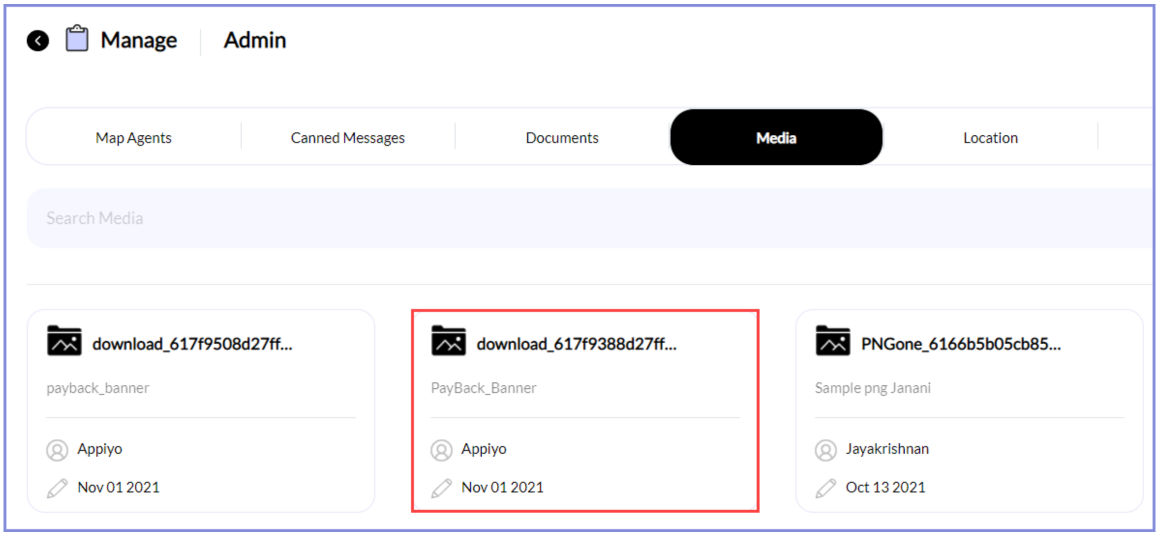


Pre-upload media

- To pre-upload the images and audios, click **Add Media** and select the media file to be uploaded from the local computer.



- Click **Save** to save the media file. Click **Replace** to add a new media file and give a **description** for the media file.



The **canned messages**, **documents, and media artifacts** added here can be attached in the **chat interface**.

Channels

Generally, any distribution channel is used for distributing the products or services to the end user or customer. In this context, channels are used as a medium for sending the EnCaps to the customers.

Multi-channel marketing is the process of communicating with consumers across many channels like SMS, WhatsApp, Twitter, Facebook, or any other channel selected by the potential customers. Promoting your products and services through any one channel isn't adequate for the customers.

Marketing across multiple channels gives customers the finer choice to obtain customized messages on their preferable transmission channel.

SMS

The power of SMS marketing is undeniable. SMS is a highly individualized and casual channel, making it ideal for broadcasting delightful campaigns. It achieves higher open rates when compared to other channels.

Moreover, the user doesn't need to have the smart phone to receive and view the SMS and there is a higher chance for an individual to consume its content.

WhatsApp

Today all the customers want an omnichannel messenger to communicate with the businesses in a similar way as they connect personally with others.

Without any doubt, WhatsApp is the topmost, fast, and secure messenger with around 1.5 million users across the globe.

This popularity has turned out the WhatsApp application to be a leading marketing tool to reach out to the wide range of audience for promoting the products and services. So, you can elevate your business by privately and quickly engaging with the targeted customers through WhatsApp Channel.

Unlike SMS, with WhatsApp, you'll be able to send not only the text, but other multimedia messages like audios, videos, pictures, or even the files of size up to 64MB also.

And they have the additional benefit of verifying businesses so consumers can trust that they are contacting the businesses they expected.

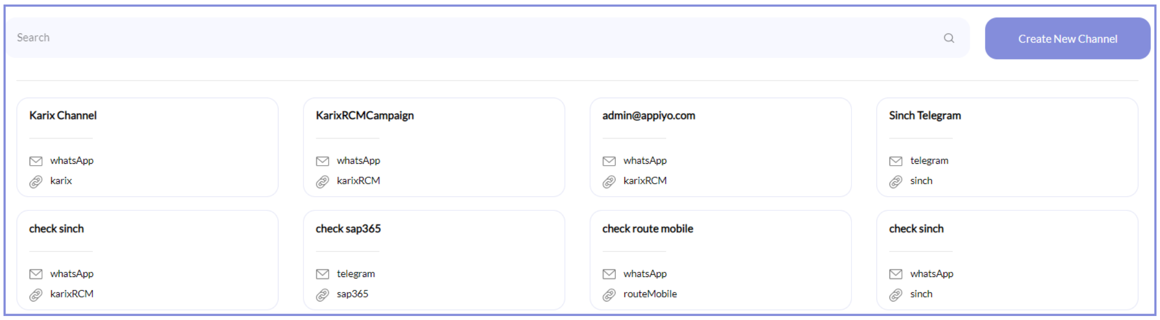
Next guide **Create Channels** aid you to create channels for sending the EnCaps across multiple channels like **SMS** and **WhatsApp**.

Create Channel

This page explains the steps to create a channel through which your prospects can receive the EnCaps.

Navigation: Admin->Channels

1. **Channel** page lists the channels that are already configured for your use.



2. To create your own channel, click **Create New Channel** and enter the name of the channel in **Name**.

3. Select your desired type of channel (SMS, WhatsApp, Telegram) from **Type**.

Create SMS Channel

1. To create a new SMS channel, select the type of channel as **SMS** from **Type.**

2. Choose the **Vendor** for the selected channel for example, select the SMS vendor Karix.

> **Info!** Karix helps you to integrate across channels like **SMS**, **WhatsApp**, and **RCS**.

3. If you choose Karix as the Vendor, provide the Karix credentials in appropriate columns. That is, Copy and Paste the **AUTH ID** and **AUTH TOKEN** in Karix username and Password. Refer Link Karix Account to view more about obtaining AUTH ID and AUTH TOKEN from Karix.

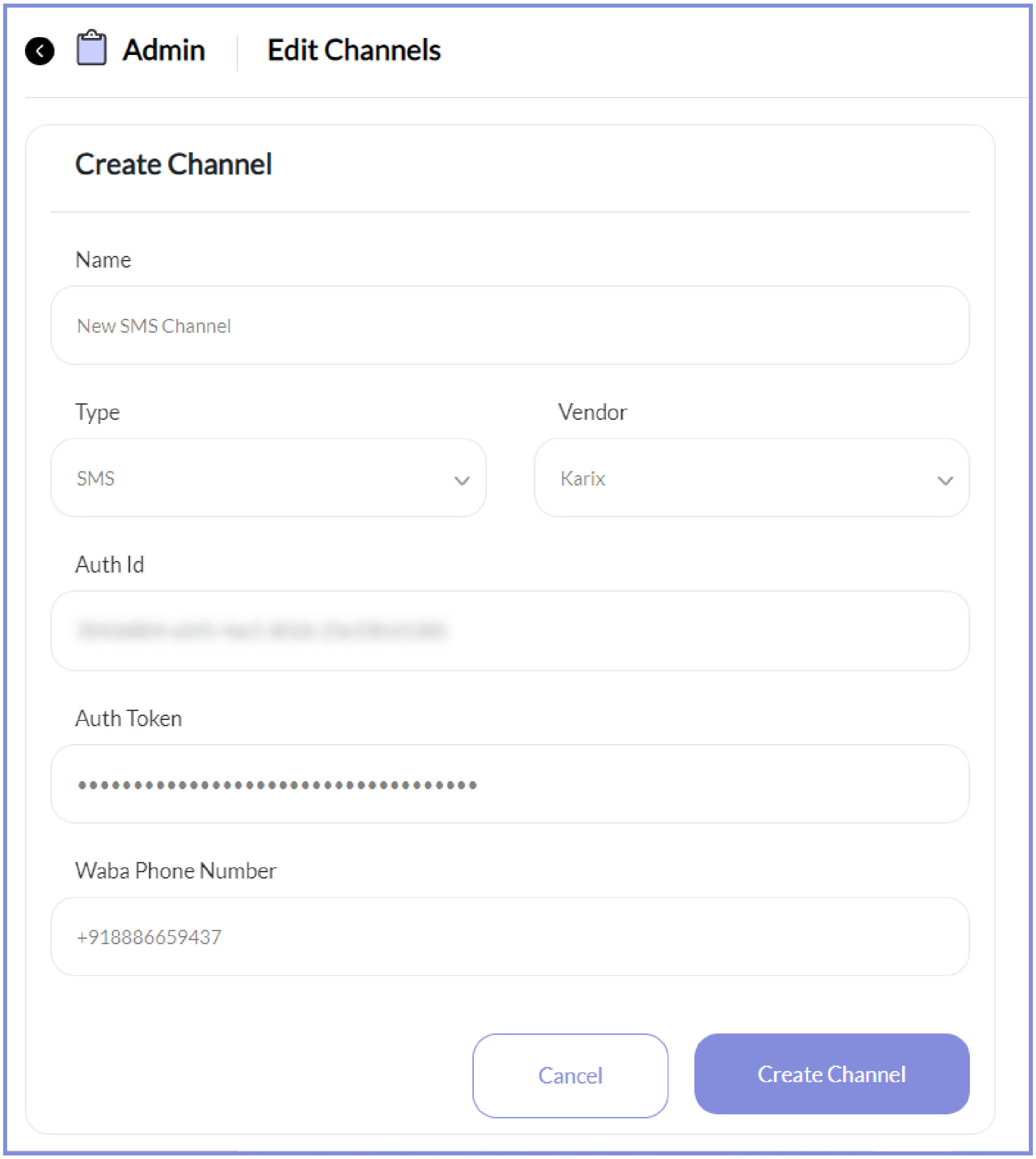
> **Info!** The Karix *AUTH ID* and *AUTH TOKEN* can be obtained after you have registered in the SMS provider **Karix.io** portal.

4. Enter the Waba Phone number with country code and without any space. Example: +919847472431

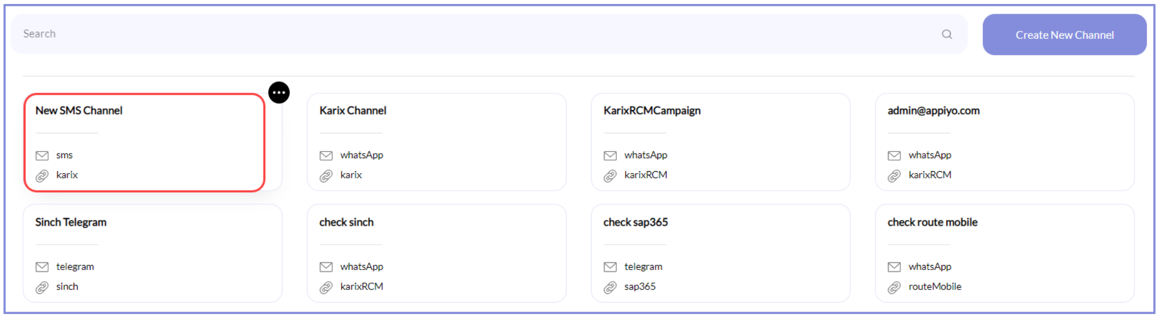
5. Click **Create Channel** to create the new SMS channel.

Let us configure a new channel called "New SMS Channel" for using it to launch Book Store EnCap.

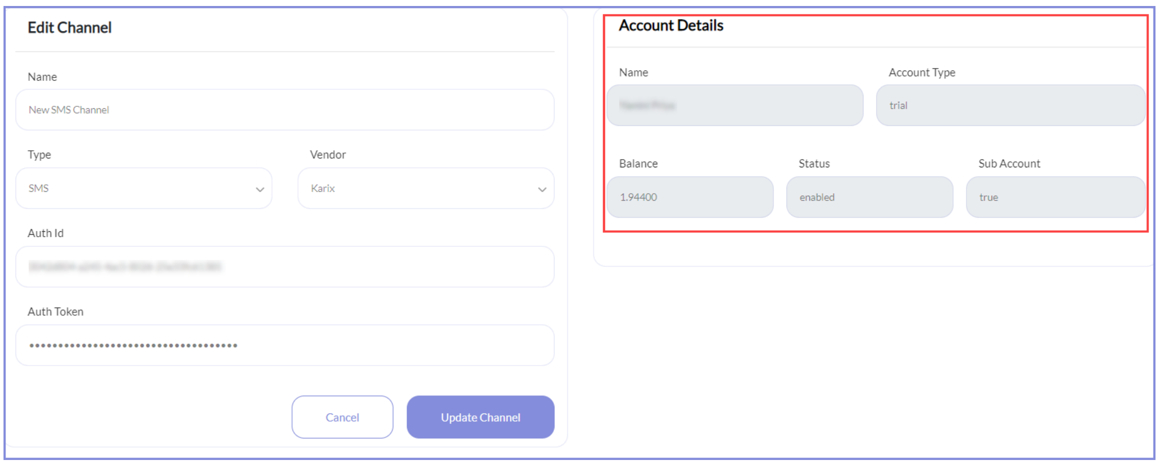
Give the inputs in the appropriate columns as illustrated in the steps given above.



After the successful creation of the New SMS Channel, it is displayed in the list of channels as shown in the figure below:



Clicking on the channel name shows your vendor (Karix) Account Details on the right side of the **Edit Channel** page.



To Create a WhatsApp Channel

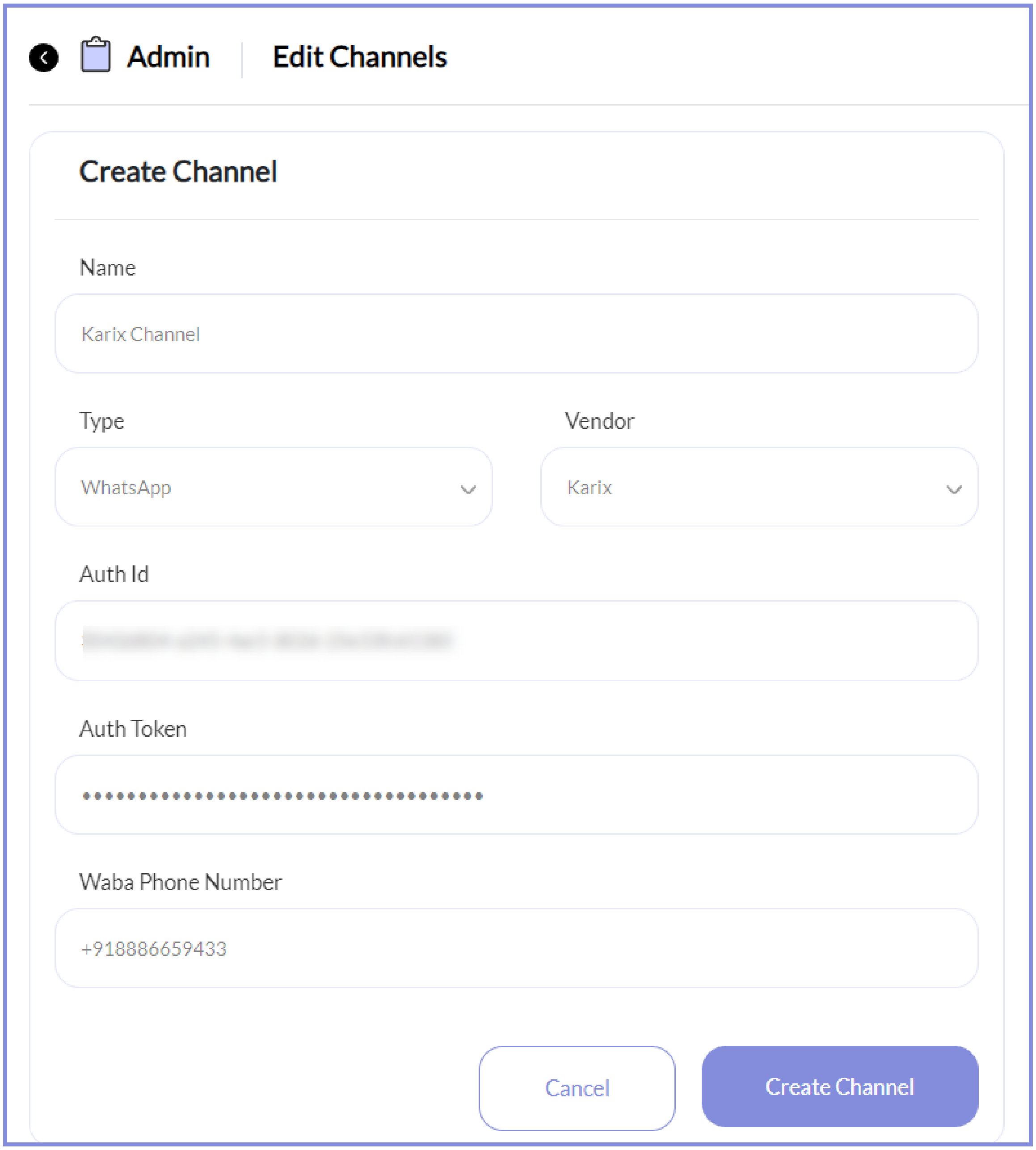
In this page, you can create your own WhatsApp channels easily by a click of a button at a reduced cost.

1. To form a new WhatsApp channel, go to **Channels** page and click **Create New Channel**.

2. Give a unique name for the WhatsApp channel.

3. Select the type as **WhatsApp** to create a WhatsApp channel.

4. Choose your **WhatsApp vendor** as **Karix** and provide the authentication credentials as described in Step 3 of the **Create SMS Channel** section.



5. Enter the Waba Phone number with country code and without any space. Example: +919847472431

6. Then click **Create Channel** to create a new WhatsApp channel.

7. You can use this channel to **Publish a WhatsApp journey** in Twixor EnCaps.

To use Karix RCM API

You can also use Karix RCM channel to publish your campaigns through WhatsApp.

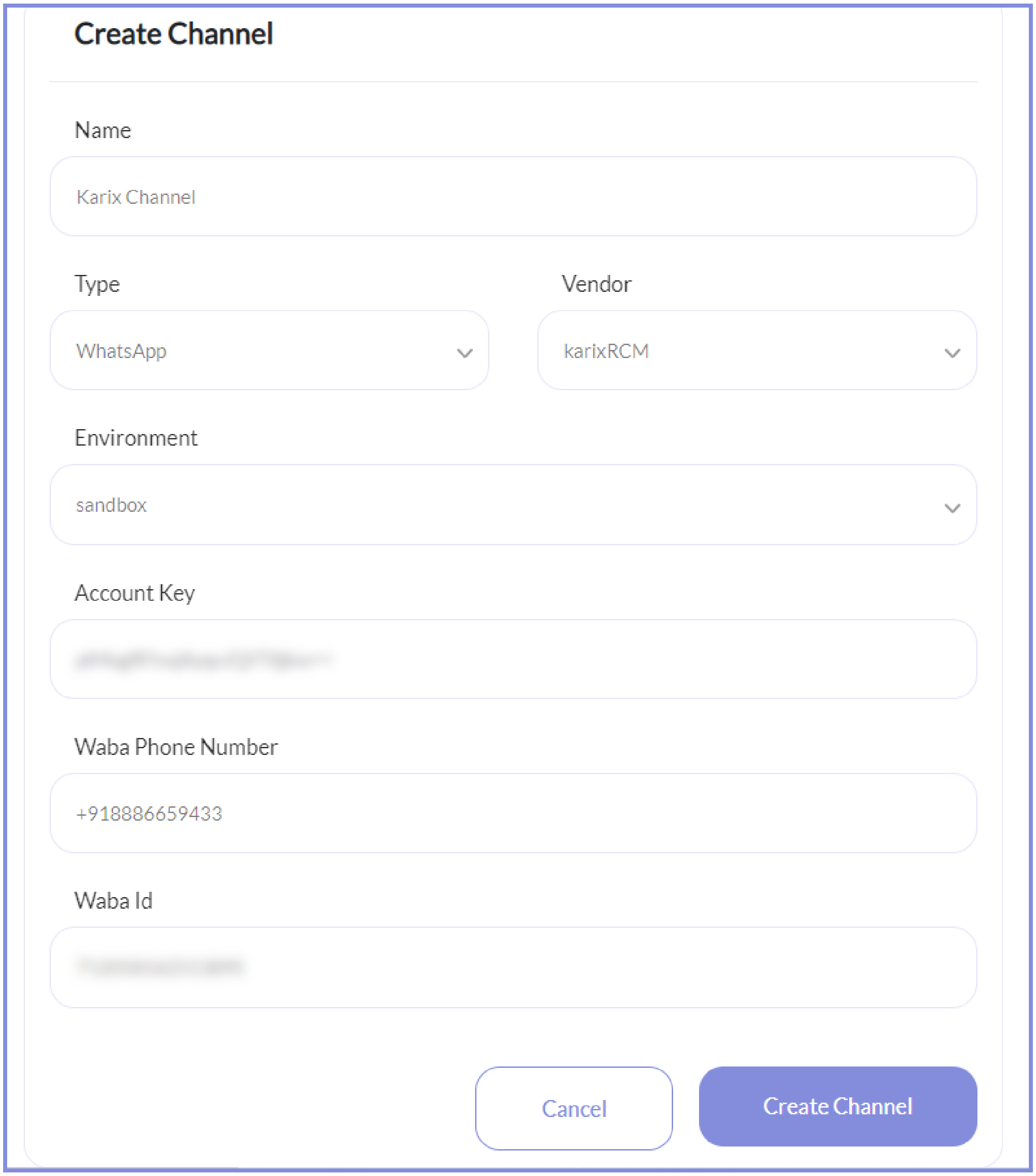
Follow these steps to create a Karix RCM account:

1. To configure **Karix RCM** channel, follow the steps from 1 to 3 in **To create a WhatsApp Channel** topic given above.

2. Select the **WhatsApp vendor** as **Karix RCM**.

3. Select the environment as **Sandbox** or **Production**.

- Click **Sandbox** to start the integration and testing right away without any special access.
- Select **Production** environment to avoid any sandbox restrictions. Contact Karix RCM support to move your application to production environment.



4. Enter the **Account Key** that can be obtained from the Karix RCM by contacting their support offline.

5. Enter the Waba number with country code and without any space. Example: +919847472431

6. Waba Id will be fetched by Karix team from their Facebook Portal.

> **Info!** Account key, Waba Phone Number, Waba Id will be provided by Karix RCM by contacting their support offline.

To create a Telegram Channel

Telegram has evolved into one of the most popular and highly secured global messaging app with over 400 million users.

The Telegram integrated with Twixor allows you to employ this potential and reach out to your customers on their favourite channel.

Get started with the Telegram Channel by these steps:

- Navigate to the **Admin** main menu and select **Channels**.
- To create a new Telegram Channel, click **Create Channel** button and enter the channel name in **Name**.
- Select the type of channel as **Telegram**.
- Select the vendor.

> **Info!** SAP 365 vendor and Sinch is included in the current version of Twixor. Sinch and SAP Social Channels 365 mobile service supports many social channels including Telegram to allow customers to connect globally.

- Enter the Hub account name or HTTP Auth login name.

> **Info!** Contact your SAP/ Sinch Account Manager for login credentials

- Type the basic authentication token.
- Click **Create Channel** to create a new Telegram Channel. The channel will be created if the authentication credentials provided are valid.

Create a Karix Account

To send the SMS marketing EnCaps through the SMS provider Karix, create an account with Karix.

Follow these steps to create a Karix account.

1. Go to **Karix.io** page.

2. Click **Start for free** option to use the trial account.

> Please refer to the Karix **Pricing** page for more details

3. This will open the Karix registration page. Key in the necessary details.

- Enter your name and your official email id in **Name** and **Your work email address** fields.
- Provide your secret keyword and the name of your organization in **Password** and **Company Name**.

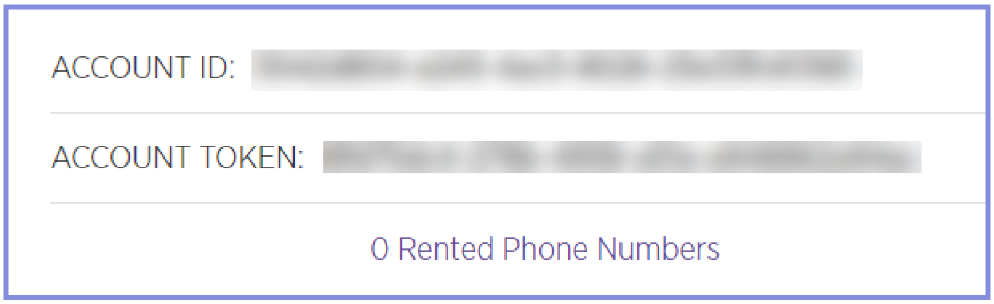
4. After going through the conditions manipulated by Karix, select **I agree to the terms of service** option to create an account with Karix.

Link Karix Account

Before linking a Karix account with Twixor EnCaps, first **create an account in Karix**.

After logging into Karix with the registered **Email** and **Password** in **Karix.io**, you can view your Karix Dashboard.

In the right pane of the dashboard, you can find the ACCOUNT ID and ACCOUNT TOKEN.

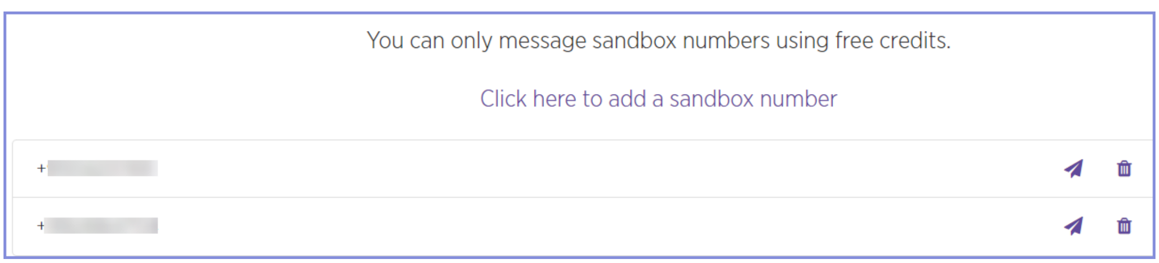


You can use this Account ID and Account Token for configuring a new channel that was explained in the **Create Channel** guide.

Then send the messages using your Sandbox through **SMS** and **WhatsApp**.

Send SMS using Sandbox

Sandbox numbers are added for testing purposes. Add to a minimum of 5 Mobile Numbers to check whether the EnCaps have been broadcasted properly to these mobile numbers through **SMS**.



Follow these steps to add a sandbox number for SMS:

1. Head to **SMS** tab and click the option **Click here to add a sandbox number**.

2. Then add your mobile number with country code in E.164 format like for example, +1562315XXXXX.

3. Click **Send OTP** option to send the unique OTP to the entered mobile number.

4. After the verification of OTP, the number you have entered will be added to the sandbox.

5. Then you can send the SMS to this sandbox number.

> **Warning!** You can send **SMS** to these sandbox numbers alone using free credits. You have to pay some **cost** if you have to send messages to more than 5 mobile numbers.

Sandbox Numbers for WhatsApp

1. Click **WhatsApp** tab to add your sandbox number to interact with the customers in this sandbox via WhatsApp.

> **Info!** Karix will assign you a sandbox number by default

2. Save this number as a new WhatsApp contact and send the text "**join (the given text)**" to it.

> **Info!** You will be given a unique text by Karix to join this sandbox

3. Then the mobile number from which you have send this text will be added to this sandbox.

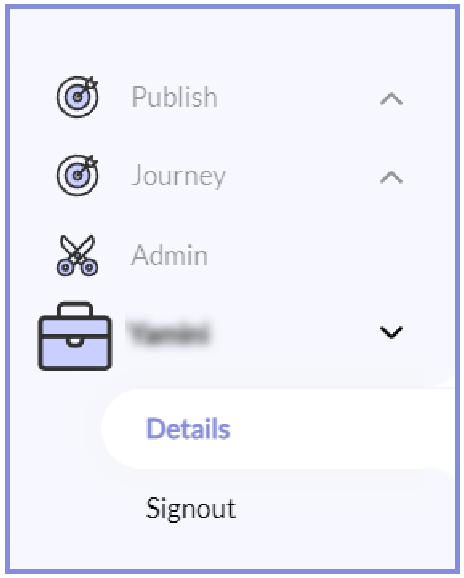
4. Now you can send the WhatsApp messages to this mobile number.

> **Info!** Karix charges you $ 0.00400 as a platform fee and $ 0 (Conversational type messages) or $ 0.00420 (notification alerts) that are received and read by the customers. For more details on pricing, refer the Karix **Pricing** page.

Personal Profile

Real promotion is not only required by businesses, but also creating a unique brand name for you as an individual. Personal branding needs you to find an image that is unique to and a name that your readers and customers can grow to recognize.

Navigation: **Profile Name**



From the list of options listed under **Profile Name**,

- Click Details to configure your personal details.
- Click **Sign Out** to log out from Twixor.

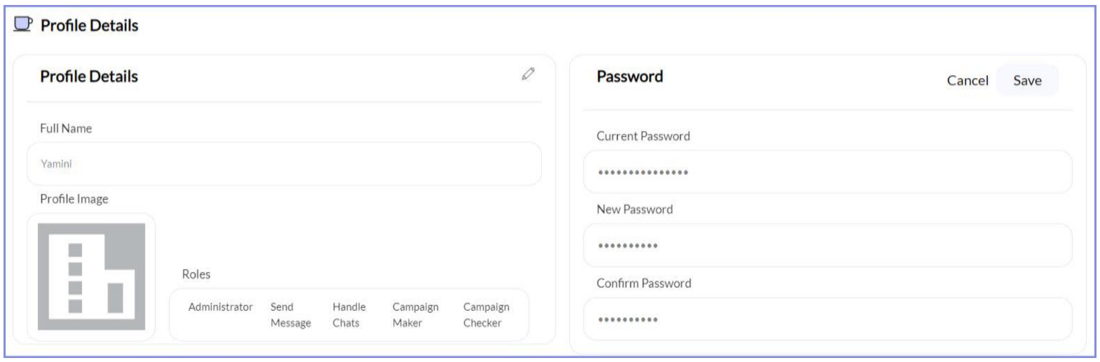
Create your Personal Profile

Follow these steps to create your personal profile.

Navigation: Profile Name ->Details

1. Under **Profile Details** section, enter your personal name.

2. Select a memorable and unique picture for your profile by clicking **Profile Image**.



3. You can view the roles assigned for you.

4. If you want to change your password, click icon to edit your password. Type your **Current Password** and **New Password** of at least 8 characters long in **Password section**.

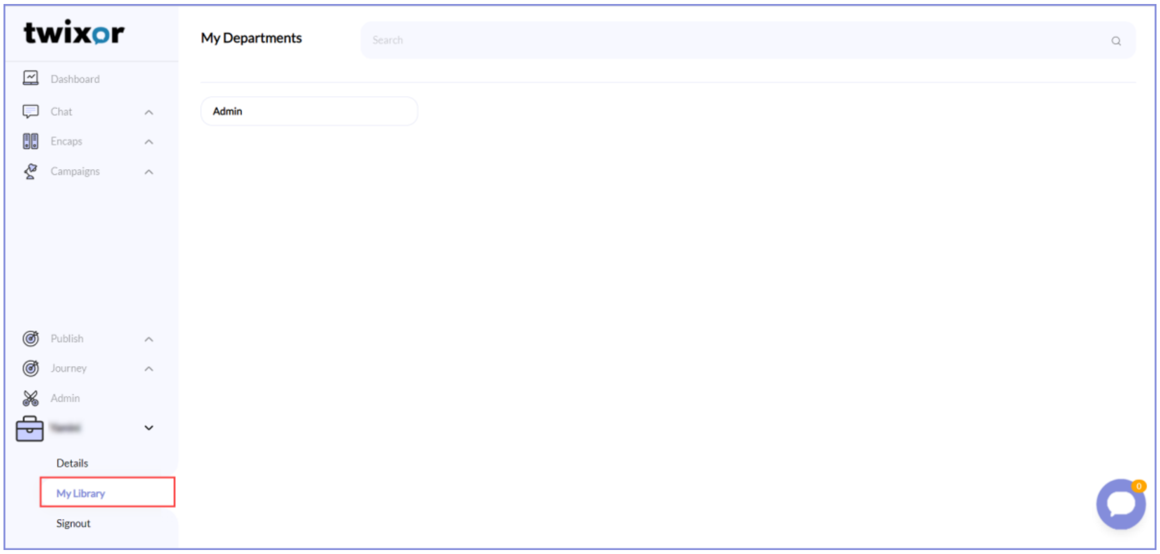
5. Confirm the password by retyping it in **Confirm New Password**.and click **Save**.

My Library

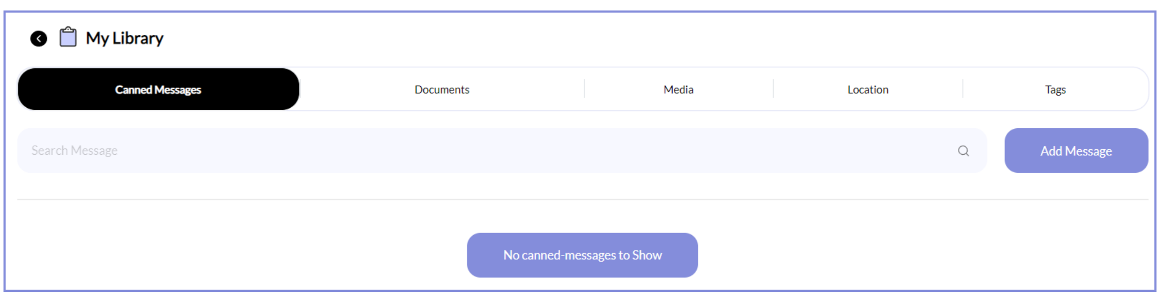
Here you can add the artifacts at the user level. The artifacts added here can be used only by the agents who pre-uploaded these artifacts.

To add the private artifacts, follow these steps:-

- Navigate to **Profile name** and click **My Library**.

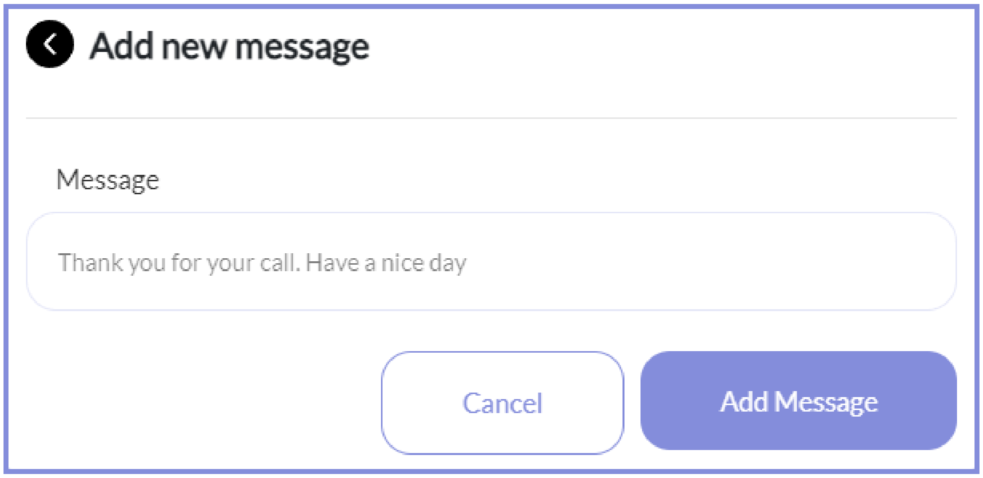


- The departments mapped to you will be displayed under **My Departments**.
- Click the department to add the **Canned Messages**, **Documents**, **Media**, **Locations**, and **Tags**. These artifacts cannot be viewed by other agents.



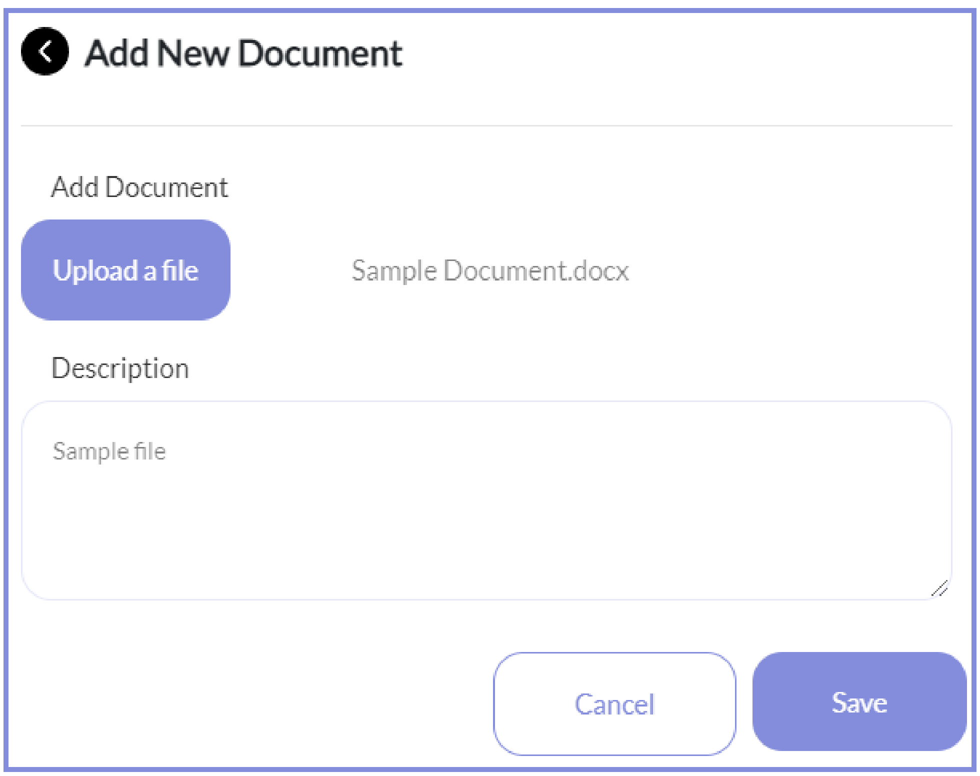
Add the canned message

- Select **Canned Messages** tab in My Library and click **Add Message**.
- Enter the **Template Message** that will be attached and sent to the users.

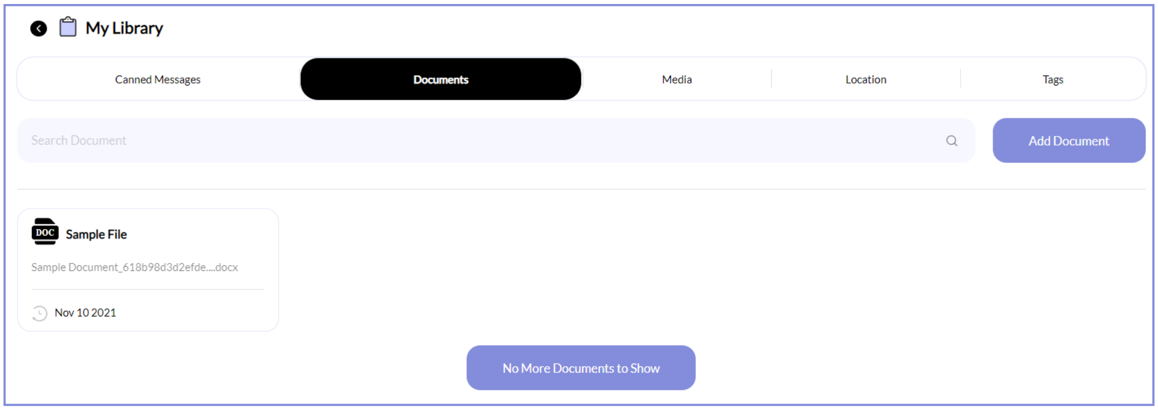


Pre-upload documents

- Select **Documents** tab in My Library and click **Add Document**.
- Click **Upload a file** to upload the document.
- Enter the **description** for the uploaded document here.



- Click **Save** to save the file.

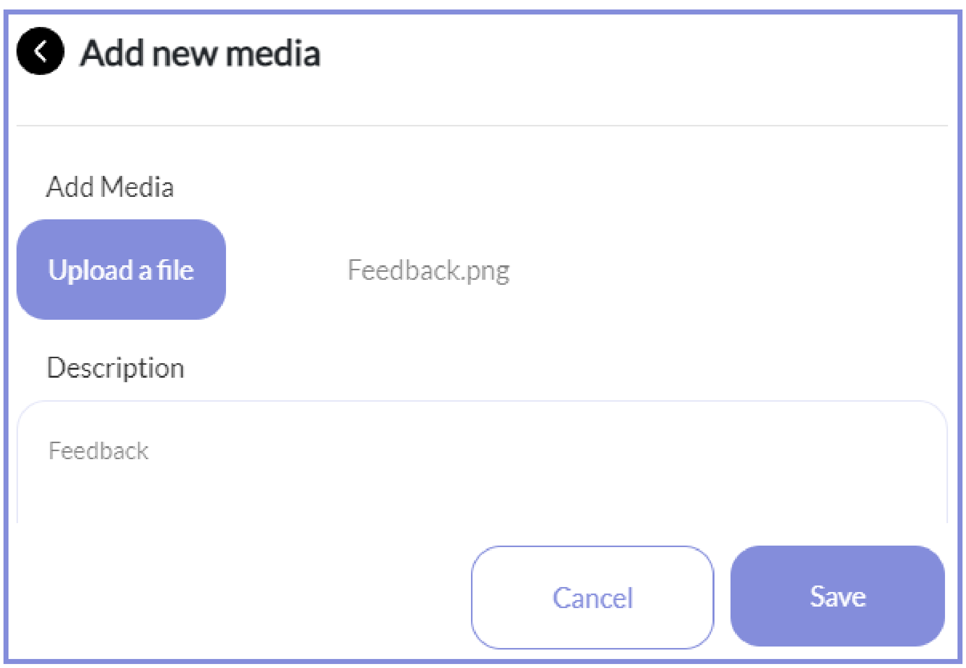


- Once the document is successfully uploaded and displayed in the list of documents, click Edit to edit the document details and Delete to delete the document.

Pre-upload Media

To pre-upload the image and audio,

- Select **Media** tab in My Library and click **Add Media**.
- Click **Upload a file** to select the media file to be uploaded from the local computer.
- Enter the **description** for the uploaded media here.

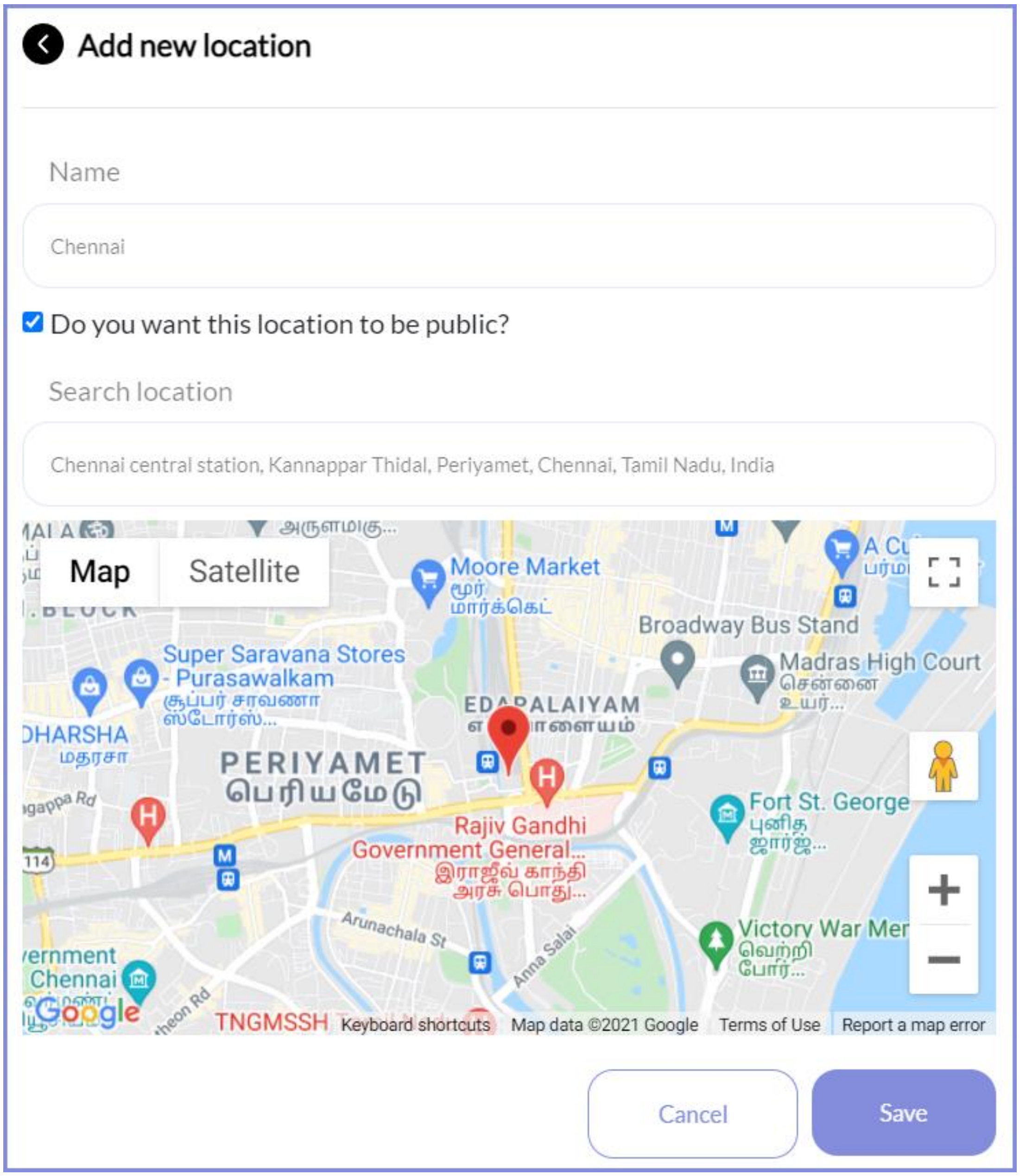


- Click **Save** to save the file.

Pre-upload Location

To pre-upload the location,

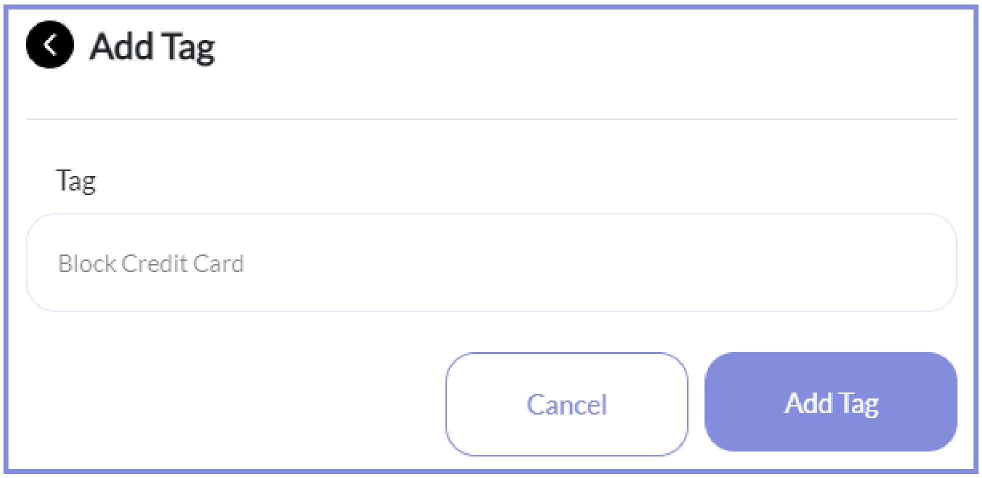
- Select **Location** tab in My Library and click **Add Location**.
- Enter the **Location** name that will be sent to the users.
- Search the exact **Location** name in the search box.
- Click **"Do you want this message to be public?"** if you allow this location to be viewed by other agents.



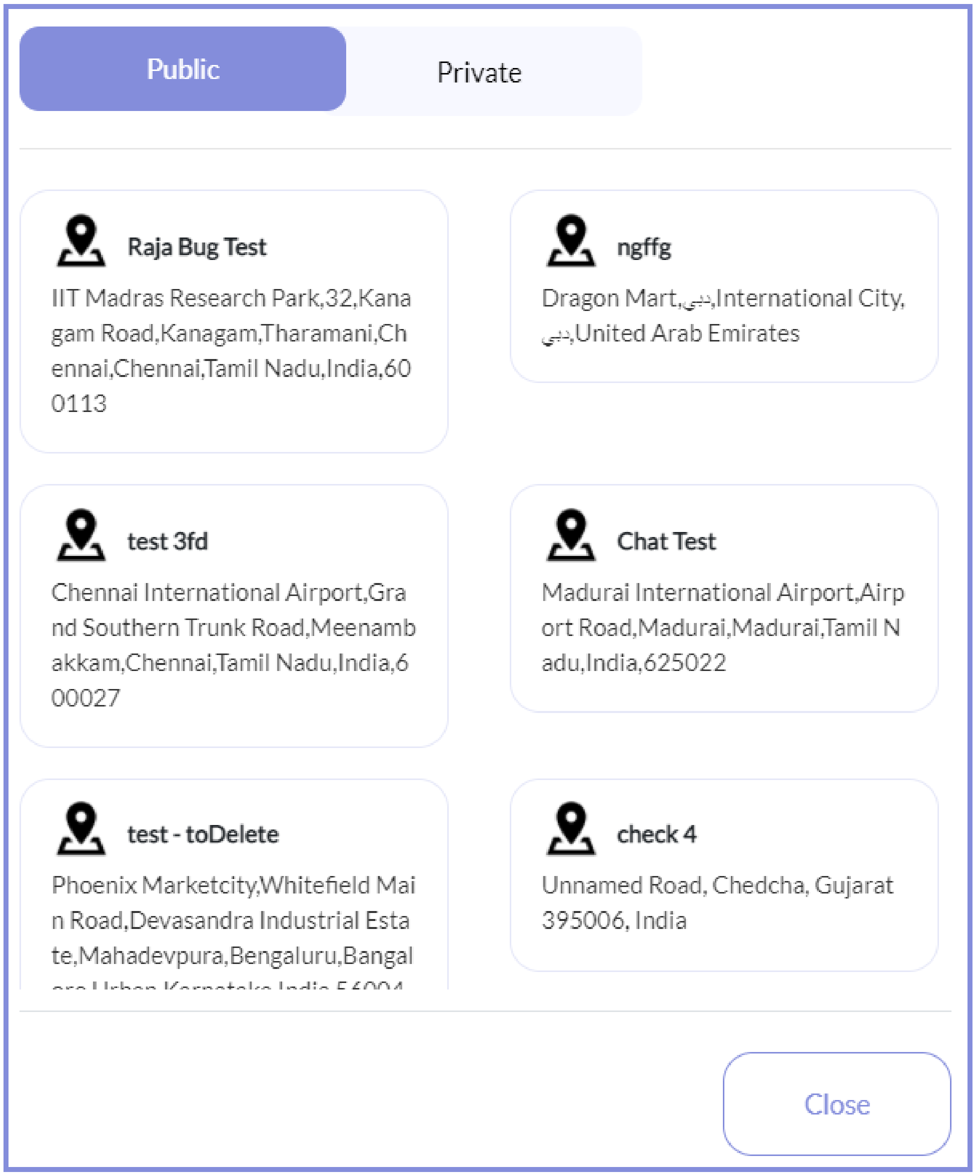
Tags

To pre-upload the tags,

- Select **Tags** tab in My Library and click **Add Tags**.
- Enter the **Tag** name for the customer to view the important details of the customer when they chat with them in future.
- Click **Add Tag** to add the tag names in the **Chat Conversation -> Additional notes -> Tags drop-down box**.



The artifacts attached here will be listed under the list of **Public and Private Artifacts** while attaching the canned messages and media artifacts in the **Chat Interface** as shown below


Public
Private
Raja Bug Test
IIT Madras Research Park,32,Kanagam Road,Kanagam,Tharamani,Chennai,Chennai,Tamil Nadu,India,600113
ngffg
Dragon Mart,دبي,International City,دبي,United Arab Emirates
test 3fd
Chennai International Airport,Grand Southern Trunk Road,Meenambakkam,Chennai,Tamil Nadu,India,600027
Chat Test
Madurai International Airport,Airport Road,Madurai,Madurai,Tamil Nadu,India,625022
test - toDelete
Phoenix Marketcity,Whitefield Main Road,Devasandra Industrial Estate,Mahadevpura,Bengaluru,Bangal
check 4
Unnamed Road, Chedcha, Gujarat 395006, India
Close

About Twixor EnCaps Enterprise Support

Twixor EnCaps Support can aid you to fix the problems that originate on their Enterprise messaging platform tool.

We offer assistance through

Customary Support

Twixor EnCaps embodies standard support. You can contact Twixor support by clicking Contact Us in the website for getting assistance on:

- Buying or Upgrading to Early Adopter/ Volume User/ Enterprise User package
- Enquiry for On Premise/ Embedded option
- Installing and using Twixor EnCaps
- Pricing and Feature Classification
- Identifying and verifying the causes of suspected errors
- Others

FAQ

If you have any common queries or concerns on our product, discover the answers from FAQs section.

FAQs

What is Twixor EnCaps?

Twixor EnCaps is an actionable instant messaging (AIM) platform that can be integrated with or embedded in to existing IT applications. AIM extends the user interface of the enterprise application to the IM window and allows two way user interaction. It has the capabilities like Loaded Buttons, Dynamic Form shipping and Configurable work flows.

How Twixor EnCaps differ from other messengers?

Twixor EnCaps is not a P2P (people to people) messenger or a collaboration tool. It is primarily a A2P (Application to People) and P2A (People to Application) two way user interaction solution. The consumption models and pricing models are very flexible and hence can be customized to suit each requirement.

Is Twixor EnCaps only available on the cloud?

No. White labeled on premise implementations are also offered.

How to use Twixor EnCaps?

The front end of Twixor EnCaps is available as a stand-alone mobile app that can be integrated with your existing IT system. It is also available as a widget that can be embedded in your existing mobile app. Twixor EnCaps back end can be hosted either on-premise or on the Cloud, and then integrated with your existing back end system.

How long it will consume to integrate the AIM capability to my IT Application?

Twixor EnCaps can be embedded or integrated within 2-3 days. More complex implementations may take up to a week or 10 days.

Will you offer Implementation and Support?

Yes, For end user customers / enterprises, Appiyo offers complete integration, implementation and support services either directly or through its channel partners. ISV's who want to bring AIM capability to their existing / new products, can license the product and make use of our product support services.

What are the possible use cases of Twixor EnCaps?

Twixor EnCaps can be incorporated in to any enterprise application across verticals and industries (example Hospital Management System, BFSI Application, HRMS, CRM, Marketing Campaign Management etc). Compared to other forms of user interaction such as Mobile Apps and Web Forms, AIM increases the immediacy, user responsiveness and engagement.

Why is an auto-generated value getting captured in some fields when a report is generated?

For eg: if the original link is https://aim.twixor.com/pwa/campaign?eId=1536&campaignId=616f9367d12c7bc0d78d8072&phoneNumber=9789805647, this is the unique link for this number, to make it common link remove the phoneNumber=9789805647 and add gli=true and the generic link becomes https://aim.twixor.com/pwa/campaign?eId=1536&campaignId=616f9367d12c7bc0d78d8072&gli=true

Can we create flow for a campaign in more than one language?

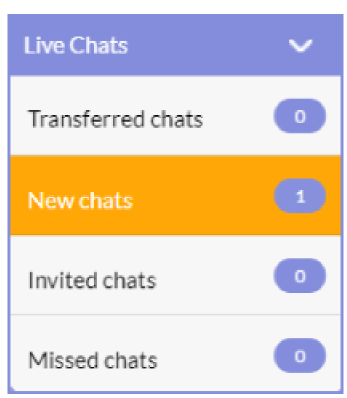
Yes, we can have two or more languages within the same flow.

Why we are receiving duplicate chats and messages from a single customer?

Duplicate entries occur when a chat is kept open and the same user begins another chat with the same number. So, admin must close the chat once the conversation is completed to avoid duplication issues.

How can an agent accept chats coming in Twixor?

Click the message icon  in the bottom right corner of Twixor application and tap the corresponding Chats (Transferred Chats, New Chats, Invited Chats and Missed Chats) to accept it. Then, you will be directed to the Chats Conversation page to initiate the conversation.



How do we generate journey reports and filter data by parameters?

To view the WhatsApp Journey Report, navigate to **Journey->Reports**.

You can view the detailed WhatsApp report by searching the WhatsApp journeys based on the journey name, environment, From Date and To Date between which the messages are sent and received, and customer number with country code.

This report contains the following details:

A unique **context Identifier** (Context Id) for each conversation with a user. Click Context Id to view the detailed context report.

Mobile number of the customer

Date and Time on which the conversation started across WhatsApp

Last Replied Message of the customer

The **State** of the conversation (Valid Values: Waiting, Chatting, Completed)

How to create multiple users?

Navigate to **Admin -> Users**

1. Click **Invite User** and enter the legitimate Email id.

2. Assign the user permissions (by selecting the respective options) to **develop, handle chats,** and to perform the role of **administrator**.

3. Finally click **Create Invite** to create the user

I am not able to publish my WhatsApp Journey.

Before publishing the flow, click **Verify** button to check if there are any errors and make sure the welcome flow, keywords and channels are added.

My message in the WhatsApp journey is not getting printed.

The Message Node does not support messages longer than 140 characters. To effectively reflect the modifications, save and publish the journey before going live.

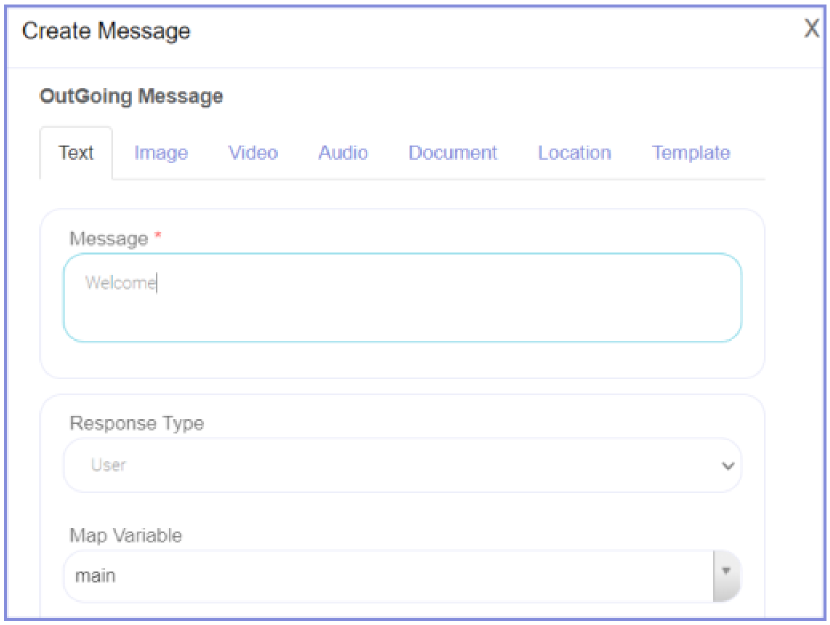
How to make modifications to the existing campaign in PWA or WhatsApp?

<u>For Encaps</u>: Navigate to **Encaps -> Workspace**, click the EnCaps from the list and open the flow designer to modify the workspace.

For Journey: Navigate to **Journey -> Journeys**, click the Journey from the list and select the Flows tab to modify the flows.

User values sent through the campaign were not captured.

In message node, select the created variable that should be mapped with the user response.



My WhatsApp journey is not displayed in sequence

Add a delay node to execute the flow in sequence.The Delay Node has only one configurable value; the number of seconds for which the next running workflow should be paused.

I'm unable to verify my WhatsApp journey.

If the flow has an error, an error message will appear while clicking verify button. So, before verifying fix all the listed errors.

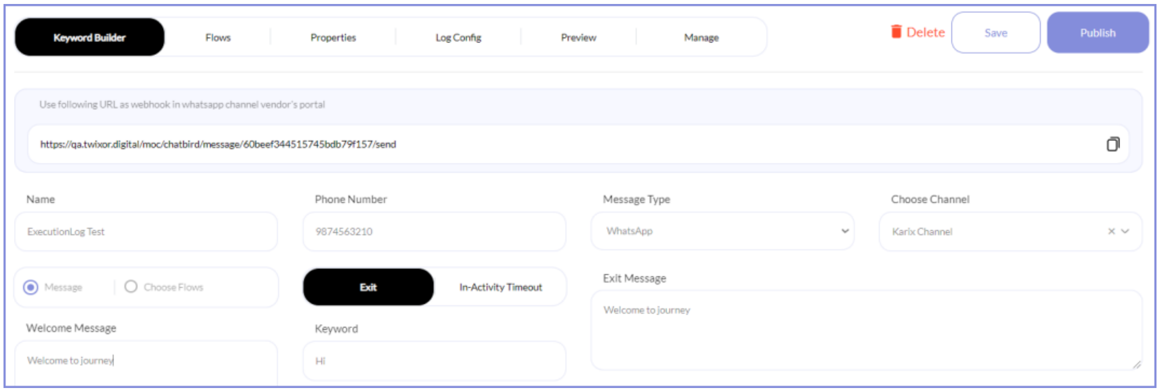
How to use keyword builder to initiate a journey?

Create special keywords to associate it with the designed work-flow of the required process.

1. **Name, Phone Number and Message Type** given during the creation of WhatsApp Journey will be reflected in this page.

2. Choose the WhatsApp channel created by you from **Choose Channel**.

3. Enter the welcome message and choose the welcome flow.



Add a Keyword

1. Click 

to add a predefined keyword.

2. To insert a child keyword, select the main keyword to add the sub-keywords for it and click.

Info! This Add Child option will be enabled when the keyword type is selected as a Keyword.

3. Then choose the flows for the selected keyword and click **Save**.

Can you have two different flows in WhatsApp Chatbot?

Yes, you can create multiple flows in WhatsApp Journey by clicking **Journeys -> Flow -> Create Flows** button.

Can you import/export the flow from a campaign?

Yes, a flow from a campaign can be replicated to build another flow by clicking J**ourneys -> Flow -> Copy to** button.

Can you duplicate a WhatsApp/ PWA Journey?

We cannot duplicate the journeys or EnCaps. However, there is an option to export and import the same journey to have a copy of that.

How to create a flow in the WhatsApp journey?

1. To create a new communication flow for your WhatsApp journey, click **Create Flows** button in Flows tab.

2. Enter a Name related to the flow and click **Submit**.

What is a Channel?

Any distribution channel is used for distributing the products or services to the end user or customer. Multi-channel marketing is the process of communicating with consumers across many channels like SMS, WhatsApp, Twitter, Facebook, or any other channel selected by the potential customers. Promoting your products and services through any one channel isn't adequate for the customers. Marketing across multiple channels gives customers the finer choice to obtain customized messages on their preferable transmission channel.

How to assign the properties for the keywords?

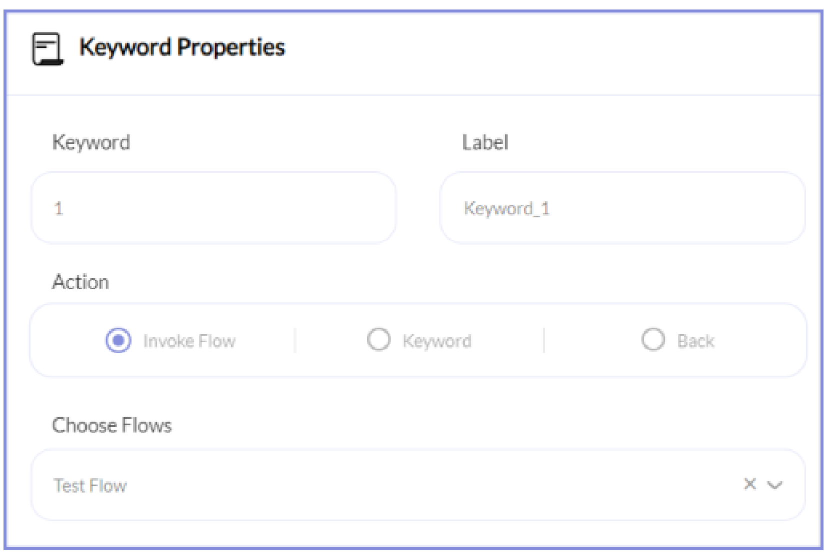
Here the keywords can be mapped with the associated flow.

1. Give a short name for the keyword

2. Provide a description for the keyword in **Label**.

3. Select the **action** (Invoke Flow/ Keyword/ Back)

4. If the selected action is a Invoke Flow, select the associated workflow that you have crafted using Workflow Designer.



How to configure REST API in an EnCap in Twixor?

Navigate to **Encaps -> Workspace** and open the EnCap designer

1. Select **Rest** to consume third-party Rest API in your application.

2. Next, select the **HTTP method** from the list of available HTTP Verbs (GET, POST, PUT, and DELETE).

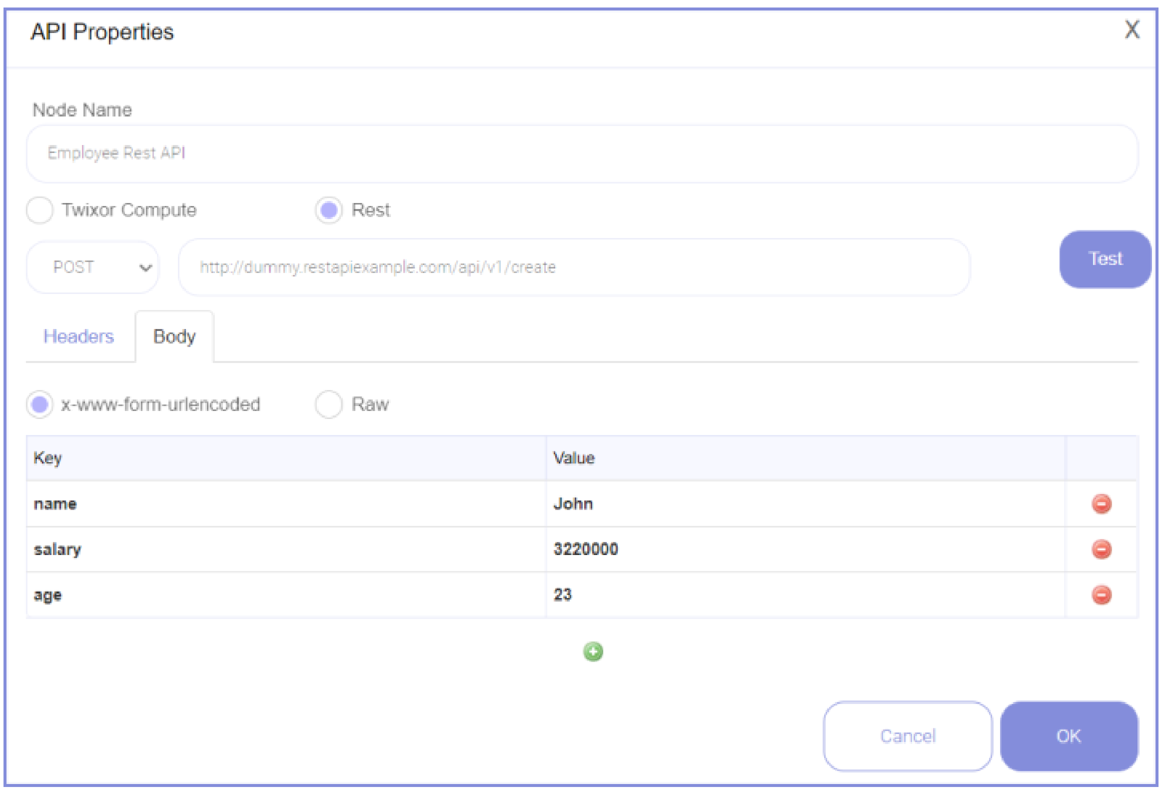
3. Enter the **Request URI** in the input field provided. Request URI refers the resource upon which the HTTP request is applied.

4. Click the **Header** tab to provide the appropriate header fields for the API request. This will open a key-value editor. Give the **Key** and **Value** for the header manually in this editor.

HTTP Body Data

x-www-form-urlencoded

- Select the body **Content Type** (x-www-form-urlencoded or Raw) while sending the form data as a POST Request.
- Use **x- form- www- urlencoded** type if you want to provide simple text or ASCII information. You have to just type the list of keys and values in the key-value editor. Twixor EnCaps will cipher it the right way.



- Use the POST method and give the request URL.
- Select the x-www-form-urlencoded option to send plain text data to the Restful API server.

- Then, give the employee details (name, salary, age) in the Key-Value editor.
- Click **Test** to view the API response for this request

How to generate reports based on the daily responses?

For EnCaps: Navigate to **Encaps -> Workspace -> Reports -> Select the date**

For Journey:Navigate to **Journey -> Reports -> Select the date**

To generate the daily reports, you can filter the required data and select the start date and end date as current date and click **Get Report**.

Can one agent view the chat `history/missed chats reports for all other agents as well?

Yes, an agent can able to view the others agents chat history only if they have the administrator rights.

How to configure buttons to a flow in WhatsApp Journey?

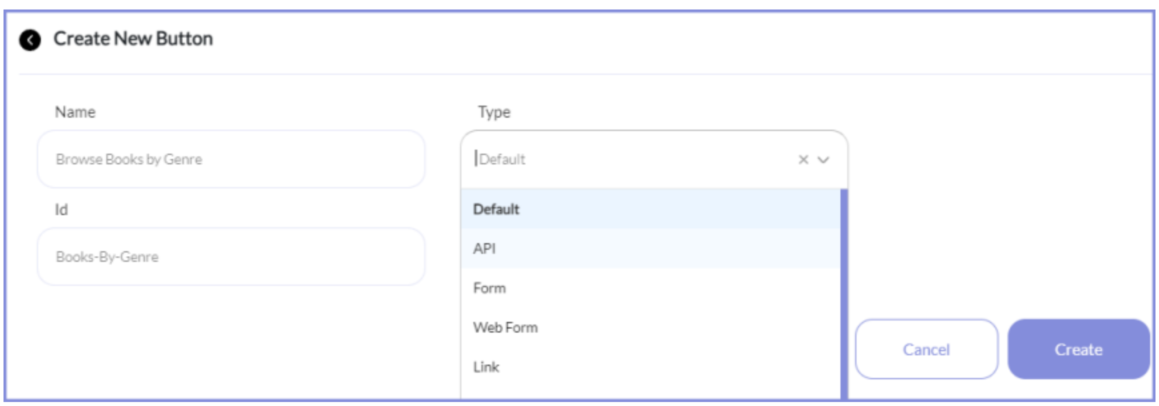
Configuring a new button involves the following steps:

1. Click **Create New Button** option, enter an identity for the button in Name.

2. Provide a unique description for the button in **Identifier**.

3. Select the type of the button from **Type**.

4. Choose the preferred button type and click **Create**.



The quick replies template in my WhatsApp journey is not working?

The quick replies template will not work when it doesn't have the approved button templates for the specific WaBa number on it and buttons should be configured.

How to add emojis in the flow?

To add emojis, just copy and paste the emojis in the message node.

How to set the background in PWA?

Navigate to **Encaps -> Workspace -> Theme**

Click **Upload** button to set the background image in PWA.

How to set Logo in PWA?

Navigate to **Encaps -> Workspace -> Theme**

In Campaign Details, click icon to set the logo in PWA.

What are some use cases for Twixor Compute?

Low-code development, micro-services based solutions, Claims management, Project management, Operational efficiency.

How to create a channel in the journey?

1. Navigate to **Admin -> Channels.**

2. To create your own channel, click **Create New Channel** and enter the name of the channel in **Name**.

3. Select your desired type of channel (SMS, WhatsApp, Telegram) from **Type**.

Receiving 400 Bad requests with error response as - "Phone number mismatch in journey"

WaBa Number should be prefixed with "+" character.

Can an agent in Twixor forward the message to some other WhatsApp group?

Forward option is currently not available.

How can we generate milestone reports or Campaign reports?

How to generate the Reports in EnCaps

<u>To view the report based on forms,</u>

1. Select the EnCap Workspace for which you want to view the Report.

2. Click **Reports** tab and make sure the **Report** radio button is selected.

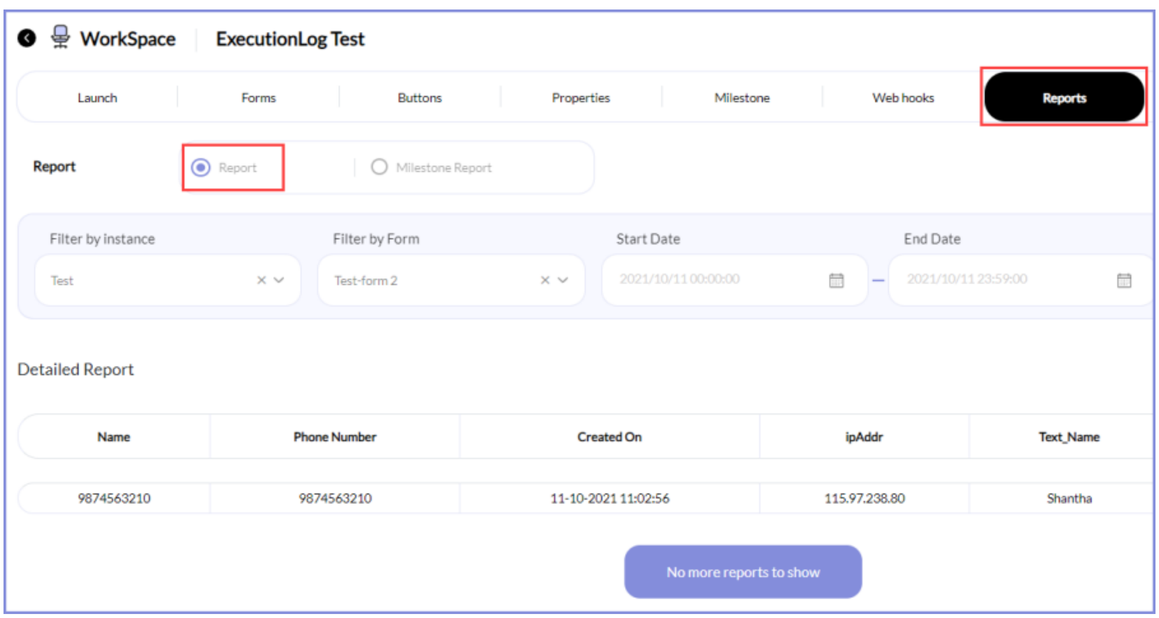
3. Select the **launch** name in “Filter by instance” column for which you want to view the Report.

4. In “Filter by Form” column, select the form name to be selected from the Select form field.

5. Select the **Start Date** and **End Date** to view the detailed form report of the EnCaps launched between these dates.

6. Click **Get Report** to view the report based on the selected criteria. The detailed report for the particular form will be displayed.

7. If you want to export the report as CSV or Excel sheet for your future reference, click Export button.



<u>To view the report based on Milestone,</u>

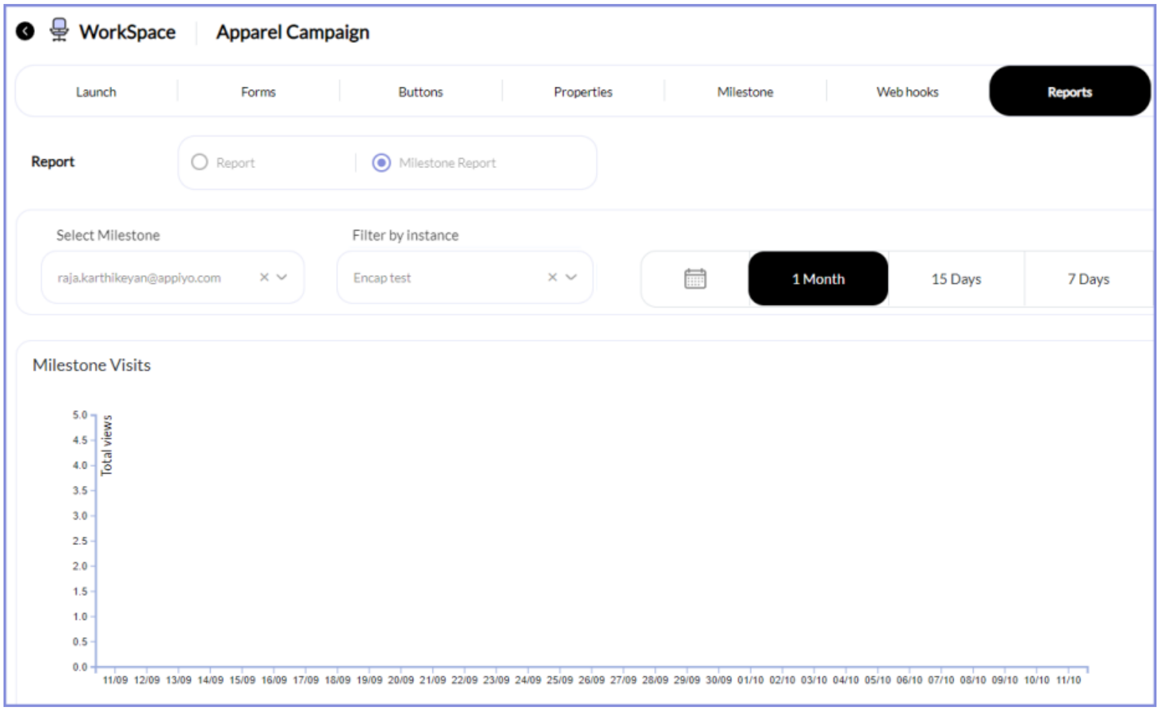
The Milestones report visually represents the list of number of users who have visited the EnCap milestones for 1 day, 7 days, 15 days, and 1 Month. Simply put, Milestone reports help you oversee the overall progress and performance of the EnCap.

1. To view the milestone report, select the EnCap and click **Reports** tab

2. Select the **Milestone Report** radio button

3. Select the milestone name for which you want to view the milestone report.

4. Select the EnCap launch from the drop-down list and click the time period (1 Day, 7 Days, 15 Days, or 1 Month). The total milestone visits are displayed in the Single Column Bar chart as shown below.



How to send template messages from Twixor journey?

Navigate to **Admin -> Department** page.

- Select the department to which you want to add the artifacts.
- Click **Canned Messages** tab to enter the template message that can be used to answer the common queries of the customer with a standard reply.
- Click **Add Message** button and enter the message template for canned message.
- Click **Add Message** to save the template message.
- Once the canned message is saved, it will be added in the list.

What are decision nodes and how are they used?

Make a decision in the communication flow using a Decision node and add the required conditions.

1. To add a conditional branch statement, click **Add Branch**.

2. Key in a unique branch label for the condition.

Info! The label can be used to track the condition in the flow

3. And enter the condition starting with $ and within the curly braces like ${requestDetail.toLowerCase() == "y"}. It is used to tell that the name following the dollar symbol $ is a variable name and not a constant or a keyword.

Info! If any of the above conditions are not met, execution will jump to the default branch.

What parameters are transferred to the Live Agent widget?

All user queries and messages will be transferred to Live agent.

Can the customer switch between a free form interaction and a structured flow?

Yes, anywhere in the flow, the customer can invoke a free-text AI/NLP enabled conversation, get the answer and then continue with the flow => AI/NLP unstructured and menu-driven structured conversation is tightly and seamlessly integrated. i.e., if you type "I would like to speak to an agent", AI/NLP recognizes this and activates the LA node, while transferring the chat to the appropriate live agent enabling free form interaction over WhatsApp.

How are missed chats handled in Twixor?

Admins may keep track of the missed chats in **Chats -> Real time Monitor** and allocate them to the relevant live agents.

When do chats time out?

By default, chats timeout by 180 seconds

How to generate day wise missed chats report?

Navigate to **Chats -> Real Time Monitor -> Chat Missed**.

Click **Get Chats** button to generate the day wise missed chat report.

Introduction to API Documentation

Twixor EnCaps is a developer-friendly enterprise instant messaging platform, which supports a rich set of REST APIs to access all available features from external applications. One can generate EnCap launch URL and send these EnCap launches using these APIs. These APIs are simple to understand and secure to use and are accessible on the cloud once the enterprise registration process is complete.

Enterprise systems can call Twixor EnCaps APIs to send messages to mobile devices as well as Twixor EnCaps can access enterprise systems through Appiyo workflows. Twixor EnCaps APIs can be used in apps. In order to interact with Twixor EnCaps platform and execute your business requirements, you may consume the powerful, simple REST APIs that we provide.

Getting Started with Twixor EnCaps REST APIs

In order to interact with aim.twixor.com you may consume the powerful and simple REST APIs that Twixor EnCaps provides. Each Twixor EnCaps REST resource has a specific URI name as its identification. Twixor EnCaps REST APIs access these resources via their URI by using standard HTTP methods (**POST, PUT, GET** and **DELETE**). **The response format is JSON.**

It is easy to integrate and use. You can use any development environment/language to access the REST APIs as they are based on open standards.

About this document

This document guides you to use Twixor APIs. The prerequisites to use this document include, basic familiarity with software development and web services. This document helps you understand:-

- Authentication flow
- HTTP request including URI structure
- JSON responses (Both Success and Failure responses)
- Description of the request and response parameters

Understanding Twixor EnCaps REST Resources

Table given below displays the types of HTTP methods that provides access to the REST resources.

Method	Description
GET	Retrieves and displays information about requested resource
POST	Creates new resources
PUT	Updates specific resource for a given id
DELETE	Deletes resources for given id

URI Structure of Resources

General URI form of all the resources:

https://aim.twixor.com/e/enterprise/<**resource**>/

resource Name of the requested resource

Example:

https://aim.twixor.com/e/enterprise/campaigns/

Based on the request, the general URI may have one or more combinations of the following information appended at the end.

Some example URIs are:

https://aim.twixor.com/e/enterprise/<resource>/<**resource id**>

resource id Unique id assigned for the resource

Example:

https://aim.twixor.com/e/enterprise/campaigns/54daef2174093e3d84ae3280

https://aim.twixor.com/e/enterprise/<resource>?**name=&agentStatus=&createdOn=&perPage=32**

name Name of the resource to find

agentStatus Filters the resource based on its availability status

createdOn Filters the resource based on the date it is created

perPage Sets the page limit for displaying the list of filtered resource

Example:

https://aim.twixor.com/e/enterprise/users?name=&agentStatus=&createdOn=&perPage=32

https://aim.twixor.com/e/enterprise/<resource>/<resource id>/<**action name**>

action name Action to be applied to the specified resource

Example:

https://aim.twixor.com/e/enterprise/campaigns/54daef2174093e3d84ae3280/send

Quick Start

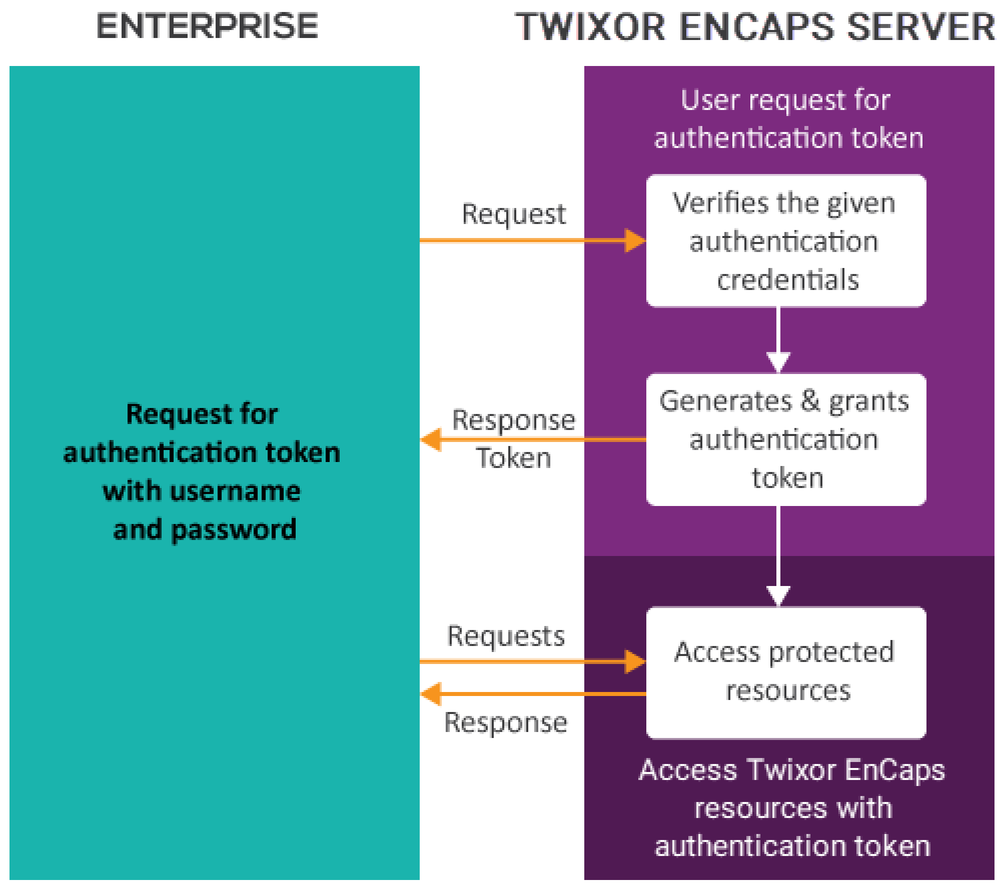
The examples in this guide use Java and cURL to send HTTP requests to access the REST resources.

Understanding the Authentication Flow

Twixor EnCaps uses authentication token (generated during login with user's id and password) as the authentication to protect their data from unauthorized access. Before sending REST request for accessing Twixor EnCap resources, you must get the authentication token.

Use your login credentials for requesting authentication token via POST method. Twixor EnCaps verifies the given credentials and gives the generated authentication token in the JSON format. This authentication token should be added to the **http cookie header** in all subsequent **requests** for accessing Twixor EnCap resources. During each login, a new authentication token is generated.

Following diagram explains the authentication flow in Twixor EnCaps:



Step One: Getting Authentication Token

You can use the Login REST API to login to your Twixor EnCaps account using your authentication credentials (user id and password). An authentication token (in JSON format) is created which is required for further access of the resources. The request format for login is:-

Request URL: https://aim.twixor.com/account/enterprise/login

Request Method: POST

Response Content Type: "application/json"

Example cURL Request for getting authentication token

```
curl https://aim.twixor.com/account/enterprise/login -d "email=email" -d
"password=password" -c <cookie>
```

Example Java Code for getting authentication token

```
//Request for getting the authentication token

URL loginUrl = new URL("https://aim.twixor.com/account/ enterprise/login");

HashMap<String, String> params = new HashMap<String,String>();

params.put("email","email");

params.put("password","password");

StringBuilder url = new StringBuilder();

if(params != null && params.size() > 0) {

    for(Map.Entry<String, String> entry : params.entrySet()) {

        url.append(entry.getKey());

        url.append("=");

        url.append(URLEncoder.encode(entry.getValue()));

        url.append("&");

    }

}

String data = url.toString();

    HttpURLConnection authConnection = (HttpURLConnection)
loginUrl.openConnection();

authConnection.setDoOutput(true);

authConnection.setRequestMethod("POST");

authConnection.setRequestProperty("Accept", "application/json");

DataOutputStream wr = new DataOutputStream( authConnection.getOutputStream ());
```

```java
wr.writeBytes(data);

//getting cookie from header fields and storing in the string “cookie”

//to pass in the subsequent requests

InputStream stream = authConnection.getInputStream();

BufferedReader br = new BufferedReader(new InputStreamReader(stream));

String response = br.readLine();



JSONParser parser = new JSONParser();

JSONObject responseJson = null;

try{

responseJson = (JSONObject) parser.parse(response);

}catch(ParseException e){

System.out.println("error while parsing response : " + e.getMessage());

}

boolean status = (boolean) responseJson.get("status");

String cookie = "";

if(status){

JSONObject tokenResponse = (JSONObject) responseJson.get("response");

cookie = (String) tokenResponse.get("token");

}

System.out.println("Cookie = " + cookie);

wr.flush();
```

```
wr.close();

authConnection.disconnect();

}

}
```

The code given below stores the authentication token inside the String cookie that has been received from the login response.

```
JSONObject tokenResponse = (JSONObject) responseJson.get("response");

String cookie = (String) tokenResponse.get("token");
```

The response to the login request is given below:

Success Response

{

"message": {

"message": "Login success",

"code": 0

},

"response": {

"token": "xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx"

"status": true

}

Failure Response for incorrect user credentials

{

"message": {

"message": "Login failed",

"code": 1403

},

"response": { },

"status": false

}

Input Parameters

Table given below shows the input parameter description for log in.

email	Email-Id used to login to Twixor EnCaps
password	Password used to login to Twixor EnCaps

Response Explanation

The response explanation for login is given in the table below:

message	Success or Failure message of the Request
code	Response code for the request Example - 0 = Login Success 1403 = Login failed
token	Generated authentication token
status	True = Request has been processed successfully False = Request has not been processed

Step Two: Adding Authentication Token in Subsequent Requests

Let's see how to send POST request by adding the authentication token that we received from the login response. To send HTTP request using following code, replace <Request URL>, <Input Parameter> and <Parameter Value> with appropriate data. Let's see how to send POST request by adding the authentication token that we received from the login response. To send HTTP request using following code, replace **<Request URL>**, **<Input Parameter>** and **<Parameter Value>** with appropriate data.

Request Method: POST

```
//Sending POST request

URL requestUrl = newURL("<Request URL>");

HashMap<String, String> param = new HashMap<String,String>();

param.put("<Input Parameter>","<Parameter Value>");

StringBuilder url = new StringBuilder();

if(params != null && params.size() > 0) {

for(Map.Entry<String, String> entry : params.entrySet()) {

url.append(entry.getKey());

url.append("=");

url.append(URLEncoder.encode(entry.getValue()));

url.append("&");

}

}

String data = url.toString();

HttpURLConnection connection =

                    (HttpURLConnection)requestUrl.openConnection();



connection.setDoOutput(true);

//adding cookie string from POST response of login
```

```
connection.addRequestProperty("Cookie", "authentication-token=" +cookie);

connection.setRequestMethod("POST");

DataOutputStream wrt = new DataOutputStream(

connection.getOutputStream());

wrt.writeBytes(datas);

//BufferedReader has the response data

BufferedReader in = new BufferedReader(

new InputStreamReader(connection.getInputStream()));

String inputLine;

while ((inputLine = in.readLine()) != null) {

System.out.println(inputLine);

}

in.close();

connection.disconnect();

}

}
```

The authentication token stored inside the *String cookie* is added to the cookie header.

connection.addRequestProperty("Cookie", "authentication-token=" + cookie);

To know about sending requests via other HTTP methods, refer to: **Java Example Requests**

Step Three: Reading Response

By sending an HTTP request you can get a response in JSON format. The response content will vary depending on the HTTP method and request parameters used.

REST API References

Following section includes example REST requests written using Java and cURL. The response is in JSON format. All the resource URI follows the base URI https://aim.twixor.com

Table given below includes the Twixor EnCaps resources supported by REST APIs with their brief description. Click a resource name to get more information about the resource.

URL	HTTP Method	Description
/e/enterprise/campaigns/urls	POST	Generate EnCap URL
/e/enterprise/campaigns/send	POST	Send EnCaps to customers