

LAB-2334

Driving digital to human engagement

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1. Home

Welcome to the webexone 2025



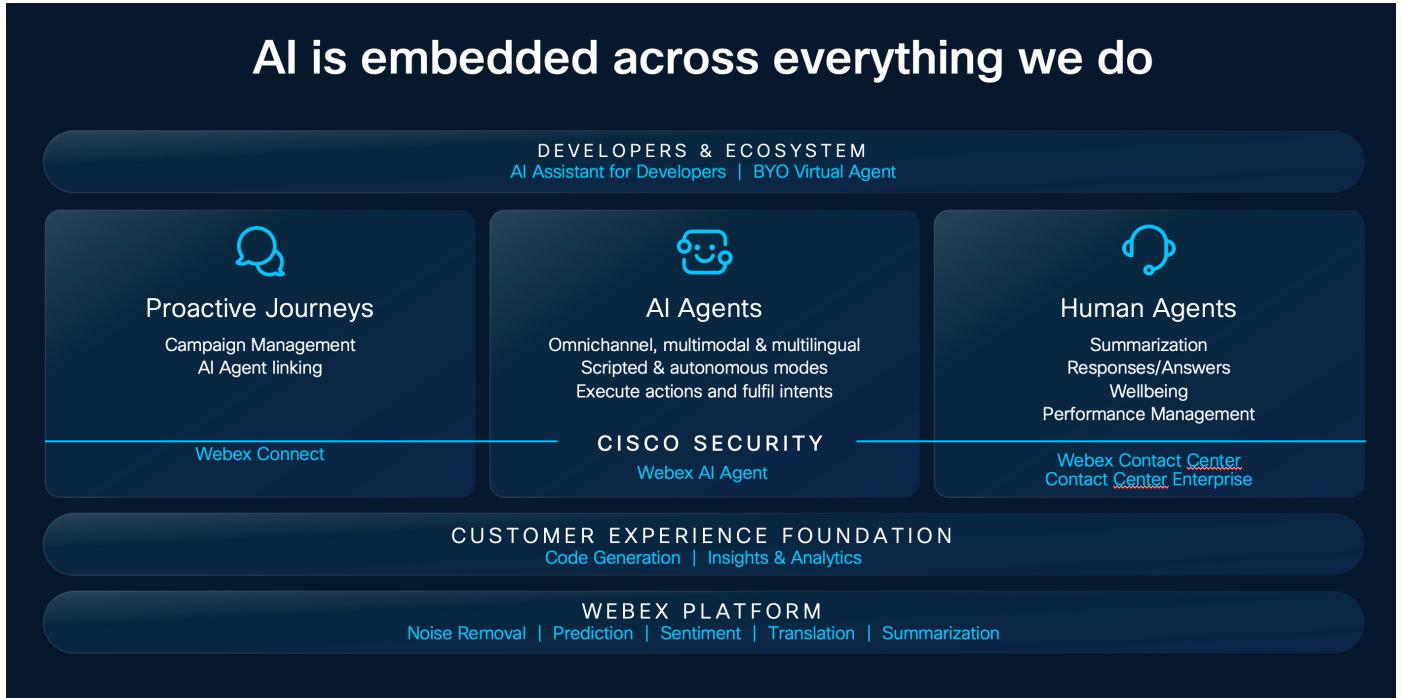
1.1 Welcome to webexone!

We're thrilled to have you with us for the next four hours as we embark on an exciting journey through the future of customer experience. Get ready for a hands-on lab filled with practical insights, interactive learning, and real-world applications designed to elevate your perspective!

2. Labs

2.1 Overview

Welcome to the Webex Customer Contact Center Bootcamp!



2.1.1 Webex Customer Contact Center Bootcamp

Our three key CX software workloads work together to reimagine customer experience. In this bootcamp you will be completing three labs that cover these three pillars:

- **Lab 1 - Proactive Journeys** – Anticipate customer needs and proactively address issues before they arise.
- **Lab 2 - AI Agents** – Automate and resolve common queries efficiently, reducing wait times and improving satisfaction.
- **Lab 3 - Human Agents** – Equip human agents, supervisors, and analysts with AI-driven insights and assistance, enhancing empathy and service quality.

By embedding AI at every touchpoint, Cisco helps businesses create intelligent, adaptive, and empathetic customer experiences - where every interaction is optimized for both efficiency and personalization.

You can navigate to each Lab using the navigation links provided in this pages top banner, good luck and we hope you enjoy our bootcamp!

2.2 LAB 1: - Proactive Journeys

2.2.1 About this lab

At Cisco, our customer experience (CX) strategy is centered around achieving the specific outcomes our customers value the most. The CX Business Unit has crafted a strategy that showcases Cisco's unique capability to meet these outcomes through three primary pillars: Proactive Journeys, AI Agents, and Human Agents. Understanding how each pillar supports our overarching CX strategy is critical for delivering our solutions with confidence, credibility, and a consultative approach.

Our goal is to equip you with comprehensive expertise in this growth sector for Cisco and the market at large. While we will explore each pillar separately in the corresponding Labs, the bootcamp is designed to build a strong foundation that applies broadly across various technologies and solutions, reinforcing Cisco's position as a differentiated partner for businesses seeking to enhance their customer experience.

In this lab, the focus is on the first pillar: Proactive Journeys. This session will cover a broader spectrum of technical features and concepts essential for developing effective proactive strategies. These strategies can significantly enhance efficiency and helps to reduce the cost to serve for the business significantly.

Our three key CX software workloads work together to reimagine customer experience:

- Proactive Journeys – Anticipate customer needs and proactively address issues before they arise.
- AI Agents – Automate and resolve common queries efficiently, reducing wait times and improving satisfaction.
- Human Agents – Equip human agents, supervisors, and analysts with AI-driven insights and assistance, enhancing empathy and service quality.

2.2.2 Lab Objective

This lab introduces you to the following concepts: -

1. Design and build Webex Connect workflows that satisfy for the following journey requirements:

- System triggered flows
- User initiated flows
- One-way transactional flows
- Two-way automated flows
- Channel fallback logic
- Consent management
- Social hours
- Custom variables

2. Leverage messaging templates to streamline business user priorities without risking the technical components of a journey.

3. Leverage flow-driven REST API's to personalize the customer experience as well as push and pull key response and tracking data to augment the value of and maintain client-side systems.

4. Leverage Journey Data Services to support a contextualized history of interactions and touchpoints with any given end-user.

2.2.3 Background

The proactive journey pillar of our CX portfolio is powered by WxConnect and it's powerful low code no code flow builder and its relationship with external integrations, one-way and two-way SMS scenarios, internal CX-focused cross architecture such as JDS, and the flow builder's out-of-the-box functions that allow platform users to perform otherwise complex development tasks in a configuration-based approach. These features combined offer brands an enormous advantage to rapidly develop, execute, and

iterate on CX communications journeys – whether they’re proactive in nature, end-user initiated, or self-service oriented (also referred to as structured two-way engagements).

Lab 1 focuses on creating a structured flow that is a streamlined, systematic method to automate communications. It involves:

- Clear Objectives: Defined goals for each communication campaign.
- Sequential Steps: Ordered actions based on customer or system interactions.
- Decision Points: Branching paths depending on customer or system responses.
- Standardization: Reusable templates for consistent messaging.
- Documentation: Visual tools to map out and manage flows (ie., the flow builder canvas).
- Control Mechanisms: Analytics to monitor and optimize performance.

The structured flows offer a more guided experience for the customer.

When this lab is completed, we will have built our first workflow, that handles a two-way structured self-help delivery use-case for the Cisco Store. The persona chosen for this lab is an existing customer and the use-case represented is an online purchase of a Core Trio QI Charger (shown in the picture below) for delivery to an address already on file with the store’s source system that is referred to as CRM in this lab guide.



The lab will follow these steps in chronological order: -

1. Let us assume that you are the customer that just purchased the above charger from Cisco Store. The system will trigger a notification which will trigger a workflow responsible for proactively notifying the customer, that their purchase was successful and is being processed, and it indicates the details surrounding the order in a highly personalized manner.
2. Then the workflow will build on the previous step and inform the customer about the processed order and informs that the order is about to be shipped, offering the customer the ability to either confirm their delivery details are correct or tweak the delivery experience.
- Throughout this workflow, you will be asked to request data from source system (CRM) to personalize the messaging and associated logic steps involved. You will also be asked to update the CRM based on the selections made by your end-user.
- Throughout this workflow, key milestones in the customer's journey are logged to capture contextual bread crumb trail so that the customer's interactions with respect to this journey can be harnessed for improved awareness on the brand-side that will benefit both the brand's operational efficiency and the customer's overall experience.
3. The last workflow will be a SMS triggered workflow to allow the customer's to initiate contact with the brand in a self-help capacity at any given time to check on their order status.

Due to the time constraints, we will not build the entire flow from scratch, instead we will copy a pre-built flow and modify the variables to match the Pod assigned to you.

2.2.4 Best Practices to consider

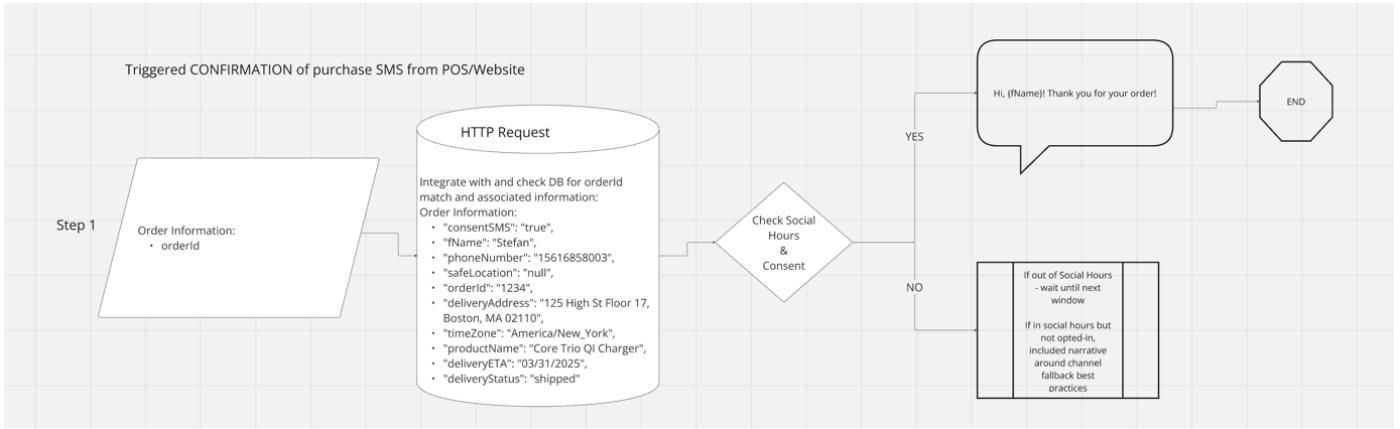
When designing workflows, there are typically a few considerations that are rules of thumb. Outside of these, it is up to the brand to structure the flow to get a customer from point A to B.

- The flows should minimize system overhead; this will reduce points of failure and time to complete the transaction.
- Example: - In proactive journeys, ensuring we have customer's consent to message them is not only important - it is the law! To ensure we're able to respect this business condition, Webex Connect has a built-in Contact Policy module. This is completely redundant if the customer already has a source of truth such as a CRM that they prefer to use instead. That said, the Contact Policy is a valuable 'last line of defense' option if the customer doesn't trust their data or would simply prefer to use our 'out of the box' feature.
- Reporting and metrics are important to consider up front - make sure that whatever you're building, and its corresponding flow-design, is architected in a manner that allows you to accurately and efficiently collect whatever key data points are valuable towards the use-case and the measurement of the solution.
- NOTE: For the purposes of this lab, we will be leveraging Journey Data Service as our repository for key insights regarding the customer's progression.
- A single flow does not need to incorporate every single decision branch, API call, or interaction with an end user. Flows can trigger other flows at any step, meaning you can break up your use-case into more manageable pieces or even incorporate "Catch All" flows that triage any inbound message or keyword and funnels it down to the appropriate corresponding sub flow(s).
- Consider cost - By leveraging proactive journey's, brands can serve their customers with the lowest cost per interaction compared to talking to a human agent-->

2.2.5 Cisco Store Use-Case

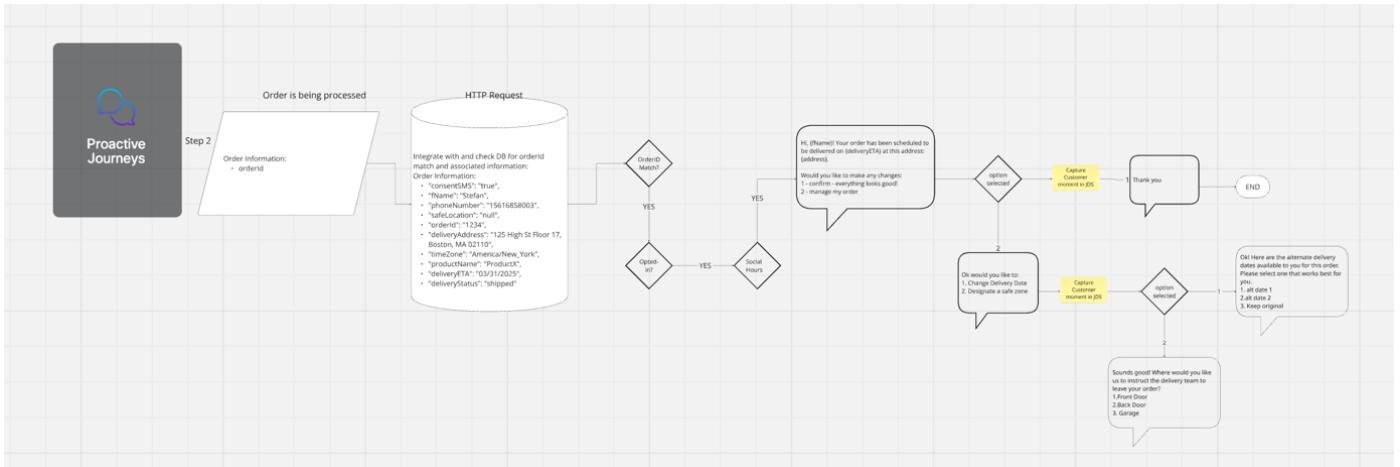
First, let us understand the use-case or customer journey that is part of the workflow.

- The first leg of the use case is triggered when the customer completes the purchase of the Core Trio Qi charger.



- The business is going to send a transactional notification indicating their purchase is confirmed and being processed for shipment.
- As soon as the customer completes the purchase, the CRM is updated with the customer information, and it triggers a notification request to be sent to the customer confirming the purchase.

- The second leg of the use case is triggered when the customer order is shipped.



- The notification is triggered when the order is shipped with the delivery date and the address. This notification includes the option to manage the order that includes changing the delivery date and safe zone designation to deliver the package.

2.2.6 Goal 1: - CRM Setup

- To begin the lab, scan the QR code that is provided to you by the proctor
- After you have answered the questions, you will receive the “POD” assignments with all the credentials that is required for this lab.
- Open a web browser and navigate to <http://crm.cxocoe.us> and login with the “CRM Login and Password” that was provided to you in step #2

CRM Operations Login

Username

Password

Login

4. The first step is to create the customer record in the CRM. For this session, we are going to use a “API” end point as our CRM. To add your customer record, open a web browser and go to <http://crm.cxocoe.us>. The webpage displayed is as shown below.



CRM Operations Dashboard

Select an operation from the navigation bar above or use the quick links below.

Get CRM Data
Retrieve customer data from the CRM system using a phone number or order ID.
Go

Post CRM Data
Create new customer records in the CRM system.
Go

Update CRM Data
Modify existing customer records in the CRM system.
Go

Delete CRM Data
Remove customer records from the CRM system.
Go

Kick off Proactive Flow
Trigger webhook notifications using Order ID and Webhook Name.
Go

5. Click on “Post CRM Data” at the top navigation bar or click on “Go” button displayed within Post CRM Data contact card.

The screenshot shows the CRM Operations Dashboard. At the top, there is a blue navigation bar with the following items: CRM Operations, Get CRM Data, Post CRM Data (which is circled in red), Update CRM Data, Delete CRM Data, and Kick off Proactive Flow. Below the navigation bar, the main title "CRM Operations Dashboard" is displayed. A sub-instruction "Select an operation from the navigation bar above or use the quick links below." is present. There are five quick links arranged in two rows: "Get CRM Data" (with a "Go" button), "Post CRM Data" (with a "Go" button, which has a black arrow pointing to it from the circled "Post CRM Data" link in the navigation bar), "Update CRM Data" (with a "Go" button), "Delete CRM Data" (with a "Go" button), and "Kick off Proactive Flow" (with a "Go" button). At the bottom center of the dashboard, the text "CRM Operations Dashboard © 2025" is visible.

6. Add the data to the following fields: -

Post CRM Data

Fill out the form below to create a new customer record in the CRM system.

Customer Information

First Name	Last Name	
<input type="text" value="AddYourFirstNameHere"/>	<input type="text" value="AddYourLastNameHere"/>	
Phone Number		
<input type="text" value="AddYourPhoneNumberHereWithCountryCode"/>		
SMS Consent		
<input type="text" value="Yes"/> ▼		
Order Information		
Order ID		
<input type="text" value="AddYourPhoneNumberHereWithCountryCode"/>		
This field is automatically set to your phone number.		
Product Name		
<input type="text" value="Core Trio QI Charger"/>		
Delivery Information		
Delivery Address		
<input type="text" value="125 High St Floor 17, Boston, MA 02110"/>		
Delivery ETA	Delivery Status	Safe Location
<input type="text" value="03/31/2025"/>	<input type="text"/>	<input type="text"/>

- First Name: - **Enter your First name or a fake first name**
- Last Name: - **Enter your Last name or a fake last name**
- Phone Number: - **Enter your mobile number including the country code (For ex:- if you are in US and your phone number is +14088881111, please enter 14088881111)**, this should be a number that can receive SMS messages
- SMS Consent: - **Yes (for this lab, we will pretend to have obtained customer consent)**
- Order ID: - **This will be automatically set to your phone number**
- Product Name: - **Core Trio QI Charger**
- Delivery Address: - **Any fake address**
- Delivery ETA: - **any date in future**
- Delivery Status: - **for the first part of the lab, set this to "Not Shipped"**
- Safe Location: - **Set to either "Front Door", "Back Door" or "Garage"**
- Time Zone: - **America/Chicago**
- Alternate Date 1: - **Set it to any date after DeliveryETA date**
- Alternate Date 2: - **Set it to any date after DeliveryETA date that is different than Alternate Date 1**

7. After entering the data, click “submit order data” button to create the CRM record.

Post CRM Data

Fill out the form below to create a new customer record in the CRM system.

Customer Information

First Name

Dak

Last Name

Prescott

Phone Number

1408222111

SMS Consent

Yes

Order Information

Order ID

1408222111

This field is automatically set to your phone number.

Product Name

Core Trio Qi Charger

Delivery Information

Delivery Address

125 High St Floor 17, Boston, MA 02110

Delivery ETA

04/12/2025

Delivery Status

Not Shipped

Safe Location

Garage

Time Information

Time Zone

America/New_York

Alternate Date 1

04/01/2025

Alternate Date 2

04/02/2025

Submit Order Data



8. If the data entry is successful, http response will show the status code "200 ok" as shown below.

<p>Result</p> <pre>{ "success": true, "message": "Order data submitted successfully", "orderId": "1408222111", "timestamp": "2025-04-02T06:33:12.528Z", "data": { "message": "Record created" }, "httpResponse": { "statusCode": 201, "statusMessage": "Created", "headers": { "date": "Wed, 02 Apr 2025 06:33:12 GMT", "content-type": "application/json", "content-length": "29", "connection": "close", "apigw-requestid": "IYcGLjS_oAMEaiw=" }, "body": "{\"message\": \"Record created\"}" } }</pre>	<p>HTTP Response</p> <p>Status Code</p> <p>200 OK</p> <p>Headers</p> <pre>{ "connection": "keep-alive", "content-length": "429", "content-type": "application/json; charset=utf-8", "date": "Wed, 02 Apr 2025 06:33:12 GMT", "etag": "W/\"1ad-DQWJm+JJo0u7M0RsK2UkMWVvk\\\"", "server": "nginx/1.18.0 (Ubuntu)", "x-powered-by": "Express" }</pre> <p>Raw Response Body</p> <pre>{"success":true,"message":"Order data submitted successfully","orderId": "1408222111","timestamp": "2025-04-02T06:33:12.528Z","data": {"message": "Record created"}, "httpResponse": {"statusCode": 201, "statusMessage": "Created", "headers": {"date": "Wed, 02 Apr 2025 06:33:12 GMT", "content-type": "application/json", "content-length": "29", "connection": "close", "apigw-requestid": "IYcGLjS_oAMEaiw="}, "body": "{\"message\": \"Record created\"}"}}</pre>
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9. To view the data, click on "Get CRM Data" in the top menu

The screenshot shows a blue header bar with the following menu items: CRM Operations, Get CRM Data (circled in red), Post CRM Data, Update CRM Data, Delete CRM Data, and Kick off Proactive Flow. Below the header is a section titled "Post CRM Data" with a sub-section titled "Customer Information".

Post CRM Data

Fill out the form below to create a new customer record in the CRM system.

Customer Information

10. In the "Get CRM data" screen, enter the phone number that was used to create the record in step #3 and click on "Get Data" button. Observe the result (If the operation status pop up window is showing "Retrieving data", click "close", to close the pop up window) and verify the data that was entered. We will use this data as our CRM record for all parts of our lab.

Get CRM Data

Enter a number to retrieve order data from the CRM system.

The screenshot shows the "Get CRM Data" interface. In the "Number" input field, the value "14082221111" is entered. Below the input field is a message: "Enter a phone number or order number to retrieve data." To the left of the "Get Data" button is a red circle with an arrow pointing to it. The "Get Data" button is highlighted with a blue background. Below the button are two sections: "Result" and "HTTP Response".

Result:

```
{
  "success": true,
  "message": "Order data retrieved successfully",
  "timestamp": "2025-04-02T06:41:26.785Z",
  "data": {
    "consentSMS": true,
    "lName": "Prescott",
    "safeLocation": "Garage",
    "orderId": "14082221111",
    "timeZone": "America/New_York",
    "altDate2": "04/02/2025",
    "altDate1": "04/01/2025",
    "productName": "Core Trio Qi Charger",
    "fName": "Dak",
    "phoneNumber": "14082221111",
    "deliveryAddress": "125 High St Floor 17, Boston, MA 02110",
    "deliveryETA": "04/12/2025",
    "deliveryStatus": "Not Shipped"
  },
  "httpResponse": {
    "statusCode": 200,
    "statusMessage": "OK",
  }
}
```

HTTP Response:

Status Code	200 OK
Headers	<pre>{ "connection": "keep-alive", "content-length": "1135", "content-type": "application/json; charset=utf-8", "date": "Wed, 02 Apr 2025 06:41:26 GMT", "etag": "W/\\"46f-3NgcAAKycq4Y03+m09eYyI4KD0Q\\\"", "server": "nginx/1.18.0 (Ubuntu)", "x-powered-by": "Express" }</pre>
Raw Response Body	{"success":true,"message":"Order data retrieved successfully","timestamp": "2025-04-02T06:41:26.785Z"}

11. In case you need to make any changes to the CRM data or record, click on "Update CRM Data" in the top menu.

The screenshot shows a blue header bar with the following menu items: CRM Operations, Get CRM Data, Post CRM Data, Update CRM Data (circled in red), Delete CRM Data, and Kick off Proactive Flow. Below the header is a section titled "Get CRM Data" with a sub-section titled "Enter a number to retrieve order data from the CRM system".

12. To update any field, enter the phone number for the order Id. Click the drop down "Field to Update" to select field that needs to be updated and enter the updated information in the "New Value". For Ex: - In the below image, we are going to update the "Alternate Date 1" from 4/01/2025 to 4/21/2025. In case, there is a need to update multiple fields, you can update one field at a time.

Update CRM Data

Fill out the form below to update an existing record in the CRM system.

Phone Number or Order ID

1408222111

Enter the phone number or order ID for the record you want to update.

Field to Update

Alternate Date 1

New Value

04/21/2025

Update Record



Phone Number or Order ID**14082221111**

Enter the phone number or order ID for the record you want to update.

Field to Update**Alternate Date 1****New Value****04/21/2025****Update Record****Result**

```
{  
  "success": true,  
  "message": "Successfully updated altDate1 to \"04/21/2025\"",  
  "number": "14082221111",  
  "field": "altDate1",  
  "newValue": "04/21/2025",  
  "timestamp": "2025-04-02T06:52:30.983Z",  
  "data": {  
    "message": "Record patched"  
  },  
  "httpResponse": {  
    "statusCode": 200,  
    "statusMessage": "OK",  
    "headers": {  
      "date": "Wed, 02 Apr 2025 06:52:30 GMT",  
      "content-type": "application/json",  
      "content-length": "29",  
      "connection": "close",  
      "apigw-requestid": "IYe7MgwFoAMEYfg="  
    },  
  },  
}
```

13. Now try step #10 - Get CRM data and validate the changes are updated.

2.2.7 Goal 2: - Get Started with the flow

Due to time constraints, for this goal you are going to copy an existing flow and modify it. Lab 2 will be focused on you building it so please don't worry about not getting to put together the building blocks for the customer journey in this lab.

By now, you should have the "POD" assignments and the credentials for the pod. We are going to use the admin account for this part of the lab. The admin account is of the format admin\<pod#>@ciscolivelab.wbx.ai, where pod# is the pod number assigned to you. Ex: - Pod 22, the admin account will be admin22@ciscolivelab.wbx.ai

Let us get started!

1. Open a web browser and go to <https://admin.webex.com> and login with the assigned admin credentials for your pod.
2. On successful login, you should be on the Contact Center Overview landing page as shown below.

Note: There will be an error message on the bottom right which can be ignored. It is an error message to let us know that the user was not added to few groups and can be ignored.

3. Click on "Webex Connect" under quick links. It will cross launch a new tab and display "Services".

Note: There will be an error message on the bottom right which can be ignored. It is an error message to let us know that the user was not added to few groups and can be ignored.

4. Click on "Search Services" and type in Pod \<your pod number> and press "Enter". In my example below, my Pod # is 60

The screenshot shows the 'Services' dashboard. On the left is a vertical sidebar with icons for Home, Services, Flows, Rules, API, and Settings. The main area has a title 'Services' and a subtitle 'Create workspaces for your business cases or customer journeys. You can create unlimited number of services.' Below this is a search bar with the placeholder 'Q Pod 60'. A large black arrow points from the left towards the search bar. Below the search bar is a message: 'Service metrics shown below are for last 30 days'. A card titled 'Pod 60' displays metrics: 0 messages sent, 0 messages received, and 0 events. To the right of the search bar is a list of service names with 'Use This Template' buttons: NodeTestVaTzj, LogisticsParcelNo, WebhooktoSMSal, and SMSSurvey.

5. Click on Pod 60 and you will see the “Dashboard” as shown below.

The screenshot shows the 'Services - Pod 60' dashboard. The top navigation bar includes 'Dashboard', 'Flows', 'Rules', 'API', and 'Settings'. The 'Flows' tab is selected. The main content area is divided into several sections: 'Welcome, Admin sixty!', 'API - JWT Credentials' (with fields for Service ID and Service Secret), 'Traffic' (showing 0 for SMS, Messenger, Live Chat / In-App Messaging, WhatsApp, Email, and Apple Messages for Business), 'Flows' (listing templates like NodeTestVaTzj, LogisticsParcelNo, WebhooktoSMSal, and SMSSurvey), and 'Messaging API' (showing 0 for API Requests and Messages Sent). A sidebar on the left contains icons for Home, Services, Flows, Rules, API, and Settings.

6. Click on “Flows”.

Services - Pod 60

Click to edit service description. E.g., 'This service is for appointment reminders'.

Flows

Welcome, Admin sixty!

This is your service dashboard.

A service is a named workspace for managing all flows and rules related to a customer interaction/journey. Each service has a unique service key and JWT tokens that can be used for authentication when using messaging API, custom event API, and/or inbound webhooks.

Services can be locked from within the 'Settings' section to limit edit access.

API - JWT Credentials

Powerful multi channel REST APIs

Service ID: [Copy](#) [Delete](#)

Service Secret: [Copy](#) [Delete](#)

[Run in Postman](#)

Learn more about JWT authentication [click here](#)

[API Settings](#) [View Documentation](#)

Traffic

Channel	0	0%
SMS	0	0%
Messenger	0	0%
Live Chat / In-App Messaging	0	0%
WhatsApp	0	0%
Email	0	0%
Apple Messages for Business	0	0%

Flows

Start quickly with one of our pre-built templates or start with a blank canvas.

NodeTestVaTzj	LogisticsParcelNo	WebhooktoSMSal	SMSSurvey
Use This Template			

[Create Blank Flow](#) [View My Flows](#) [Configure Apps](#) [View Documentation](#)

Messaging API

API Requests	Messages Sent
0	0

7. There should be a starter flow called "Lab1 Starter Flow". We will create a flow by copying the starter flow. Click on "Create Flow".

Services - Pod 60

Click to edit service description. E.g., 'This service is for appointment reminders'.

Flow Builder

Flow builder is a visual designer with a library of nodes that you can drag and drop to create and test interactive customer journeys with little to no code.

[Check out our guide to building flows here](#)

If you've got more questions after reading through it, just ask. We're always here to help.

[Create Flow](#)

Flows

Sort By: Newest

Trigger	Flow	Status	State	Executions	Actions
NA	Lab1 Starter Flow Flow Id:56414	Draft		0	View

8. The next screen presented is to "Create Flow".

Create Flow

Flow Name
Sample Flow

Method
New Flow

 Start from Scratch

 NodeTestVaTzj

 LogisticsParcelNotifications

 WebhooktoSMSAlerts

 SMSSurvey

 Chatbot

 Autoresponder

 AppointmentReminder

Cancel Create

9. Add the following details: -

- Flow Name: - Enter the name with Pod# Lab1 Proactive Journey. In my example below, the pod assigned is 60 and my flow name is "Pod60 Lab1 Proactive Journey".
- Method: click the drop-down selection and select "Copy from existing flow".
- Select Flow: click the drop-down selection and select "Lab1 Starter Flow".
- Click "Create".

Create Flow

Flow Name
Pod60 Lab1 Proactive Journey

Method
Copy from existing flow

Select Flow

Select

Search

Lab1 Starter Flow

Cancel Create

10. The proactive journey gets triggered when the CRM triggers the notification to a webhook. The next screen presented is to "Configure Webhook".

Configure Webhook

Configuration **Transition Actions (Optional)** **Data Stream (Optional)**

Configure webhook settings to trigger this flow

Select existing webhook Create new event

Webhook URL: <https://hooks.us.webexconnect.io/events/2E9KAOQPTL>

We've generated a new endpoint for you to send requests. [Learn more about using webhooks.](#)

Name: e.g., My business event

Validate signature
Connect can validate JSON signatures generated using SHA256 or SHA512 passed in the header. Invalid request will return a HTTP 400 error

Service key or JWT needs to be passed in request header if this option is selected

Example Data

Paste Json **Paste XML** **Send Via Hook**

PROVIDE SAMPLE INPUT: 1

SELECT OUTPUT VARIABLES: PARSED VARIABLES(0)

Start Node ID: 2

Cancel **Save** Output Variables Node Outcomes

11. Under "Configure webhook settings to trigger this flow", select "Create new event" and add the following details.

- Name: *Pod# Lab1 Trigger. In the below example, the pod assigned is 60 and the name is set to "Pod60 Lab1 Trigger".*
- Example Data: Copy and paste the following JSON code.
- Note: - JSON is case sensitive so please make sure to pay attention to the JSON and maintain the same format.

```
{
  "orderId" : ""
}
```

The screenshot shows the 'Configure Webhook' page in a web-based interface. At the top, there are tabs for 'Configuration', 'Transition Actions (Optional)', and 'Data Stream (Optional)'. The 'Configuration' tab is selected.

Configuration Section:

- Select existing webhook Create new event (highlighted with a red arrow pointing to it)
- Webhook URL: <https://hooks.us.webexconnect.io/events/2E9KAQQPTL>
- We've generated a new endpoint for you to send requests. [Learn more about using webhooks.](#)
- Name: Pod60 Lab1 Trigger (highlighted with a red arrow pointing to it)
- Service key or JWT needs to be passed in request header if this option is selected
- Validate signature

Example Data Section:

Provide sample input:

```

1 {
2   "orderId" : ""
3 }

```

Select output variables:

Parsed Variables(1)

orderId:

Buttons at the bottom: Start, Node ID: 2, Cancel, Save (highlighted with a red circle)

Right Panel:

- Input Variables: List of variables available as input for this node. Search bar: Search, Custom Variables [F56416]
- Output Variables
- Node Outcomes

12. Click on Parse button. This will create “orderId” as a variable that can be used throughout the flow.

The screenshot shows the 'Configure Webhook' page. In the center, there's a large text input field containing a JSON sample:


```
1 - {  
2   "orderId" : ""  
3 }
```

 Below this is a blue 'Parse' button, which is circled with a black oval and has a black arrow pointing to it from the bottom left.

At the top, there are tabs for 'Configuration', 'Transition Actions (Optional)', and 'Data Stream (Optional)'. The 'Configuration' tab is selected. A message says, 'We've generated a new endpoint for you to send requests. Learn more about using webhooks.' Below the input field, there are several checkboxes:

- Service key or JWT needs to be passed in request header if this option is selected
- Validate signature

 A note below the checkboxes says, 'Connect can validate JSON signatures generated using SHA256 or SHA512 passed in the header. Invalid request will return a HTTP 400 error.'

On the right side, there are sections for 'Input Variables' (with a search bar and a 'Custom Variables' link), 'Output Variables' (with a 'Node Outcomes' link), and 'Node Outcomes'.

After the “Parse” button is clicked, observe the variable created under the “Parsed Variables(0)”. This method can be used to pass any number of custom variables from CRM or external data sources when triggering a flow. The variables created can also be accessed by clicking on “Output Variables”.

Configure Webhook

Configuration **Transition Actions (Optional)** **Data Stream (Optional)**

Configure webhook settings to trigger this flow

Select existing webhook Create new event

Webhook URL: <https://hooks.us.webexconnect.io/events/2E9KAOQPTL>

We've generated a new endpoint for you to send requests. [Learn more about using webhooks.](#)

Name: Pod60 Lab1 Trigger

Service key or JWT needs to be passed in request header if this option is selected

Validate signature

Connect can validate JSON signatures generated using SHA256 or SHA512 passed in the header. Invalid request will return a HTTP 400 error

Example Data

Paste Json Paste XML Send Via Hook

PROVIDE SAMPLE INPUT

```
1 {  
2   "orderId" : ""  
3 }
```

SELECT OUTPUT VARIABLES

PARSED VARIABLES(1)
orderId:

Output Variables

Start Node ID: 2 Cancel Save Node Outcomes

Configure Webhook

Configuration **Transition Actions (Optional)** **Data Stream (Optional)**

Configure webhook settings to trigger this flow

Select existing webhook Create new event

Webhook URL: <https://hooks.us.webexconnect.io/events/2E9KAOQPTL>

We've generated a new endpoint for you to send requests. [Learn more about using webhooks.](#)

Name: Pod60 Lab1 Trigger

Service key or JWT needs to be passed in request header if this option is selected

Validate signature

Connect can validate JSON signatures generated using SHA256 or SHA512 passed in the header. Invalid request will return a HTTP 400 error

Example Data

Paste Json Paste XML Send Via Hook

PROVIDE SAMPLE INPUT

```
1 {  
2   "orderId" : ""  
3 }
```

SELECT OUTPUT VARIABLES

PARSED VARIABLES(1)
orderId:

When parsed the parameter names are captured under the "output Variables"

Output Variables

Start Node ID: 2

- inboundWebhook.timestamp
- inboundWebhook.transId
- inboundWebhook.payload
- service.serviceKey
- inboundWebhook.orderId

Node Outcomes

13. We will rename the “Configure Webhook” to “Trigger Proactive Journey” by clicking on the pencil icon as shown below. Enter the name and click the check mark to save the edits.

Configure Webhook edit **Click the edit pencil to rename any node**

Configuration **Transition Actions (Optional)** **Data Stream (Optional)** **Help**

Configure webhook settings to trigger this flow

Select existing webhook Create new event

Webhook Name edit Pod60 Lab1 Trigger

We've generated a new endpoint for you to send requests. [Learn more about using webhooks.](#)

Webhook URL edit <https://hooks.us.webexconnect.io/events/2E9KAOQPTL> Service key or JWT needs to be passed in request header if this option is selected

Validate signature

Connect can validate JSON signatures generated using SHA256 or SHA512 passed in the header. Invalid request will return a HTTP 400 error

Example Data

Paste Json **Paste XML** **Send Via Hook**

PROVIDE SAMPLE INPUT edit

```
1 <!
2   "orderId" : ""
3 >
```

SELECT OUTPUT VARIABLES edit

PARSED VARIABLES(1)

orderId:

Start Node ID: 2

Cancel Save

Input Variables
List of variables available as input for this node

Search

▶ Custom Variables [F56416]

Output Variables

Node Outcomes

Trigger Proactive Journey

Configuration **Transition Actions (Optional)** **Data Stream (Optional)**

Configure webhook settings to trigger this flow

Select existing webhook Create new event

Webhook Name: Pod60 Lab1 Trigger

We've generated a new endpoint for you to send requests. [Learn more about using webhooks.](#)

Webhook URL: <https://hooks.us.webexconnect.io/events/2E9KAOQPTL>

Service key or JWT needs to be passed in request header if this option is selected

Validate signature

Connect can validate JSON signatures generated using SHA256 or SHA512 passed in the header. Invalid request will return a HTTP 400 error

Example Data

Paste Json **Paste XML** **Send Via Hook**

PROVIDE SAMPLE INPUT

```
1 - {  
2   "orderId" : ""  
3 }
```

SELECT OUTPUT VARIABLES

PARSED VARIABLES(1)

orderId:

Start Node ID: 2

Cancel **Save**

Input Variables
List of variables available as input for this node

Custom Variables [F56416]

Output Variables

Node Outcomes

14. Click “Save” to save the node configuration.

15. Click “Save” at the top menu to save the flow. When the flow is saved, the “Errors & Warnings” message will pop up and we will work towards fixing the errors in the upcoming steps, but we will ignore the warnings. It is strongly recommended that warnings are addressed in a production environment for optimal experience.

Pod60 Lab1 Proactive Journey

Working Draft

Utilities

- Evaluate
- Branch
- HTTP Request
- Delay
- Data Parser
- Data Transform
- Call Flow
- Page Connector
- Profile
- Generate OTP

Click save frequently to save the work.

Save

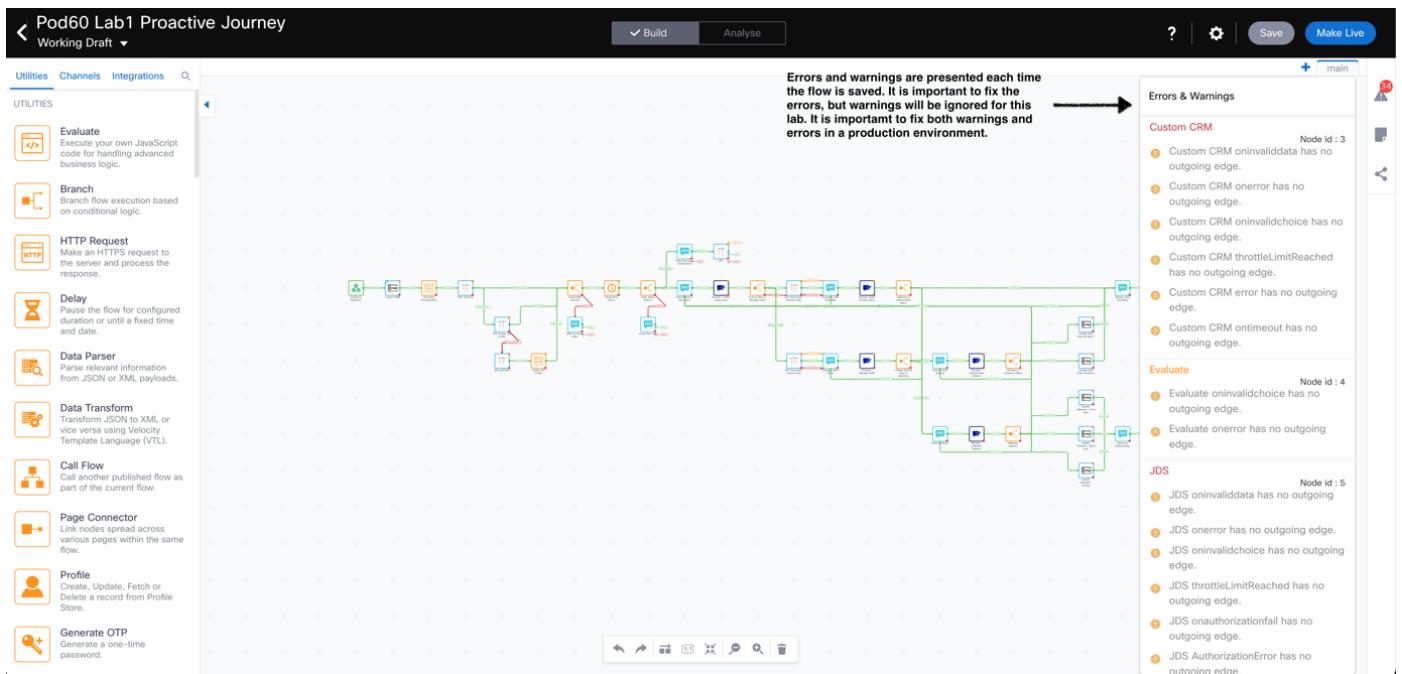
Build Analyse

Make Live

main

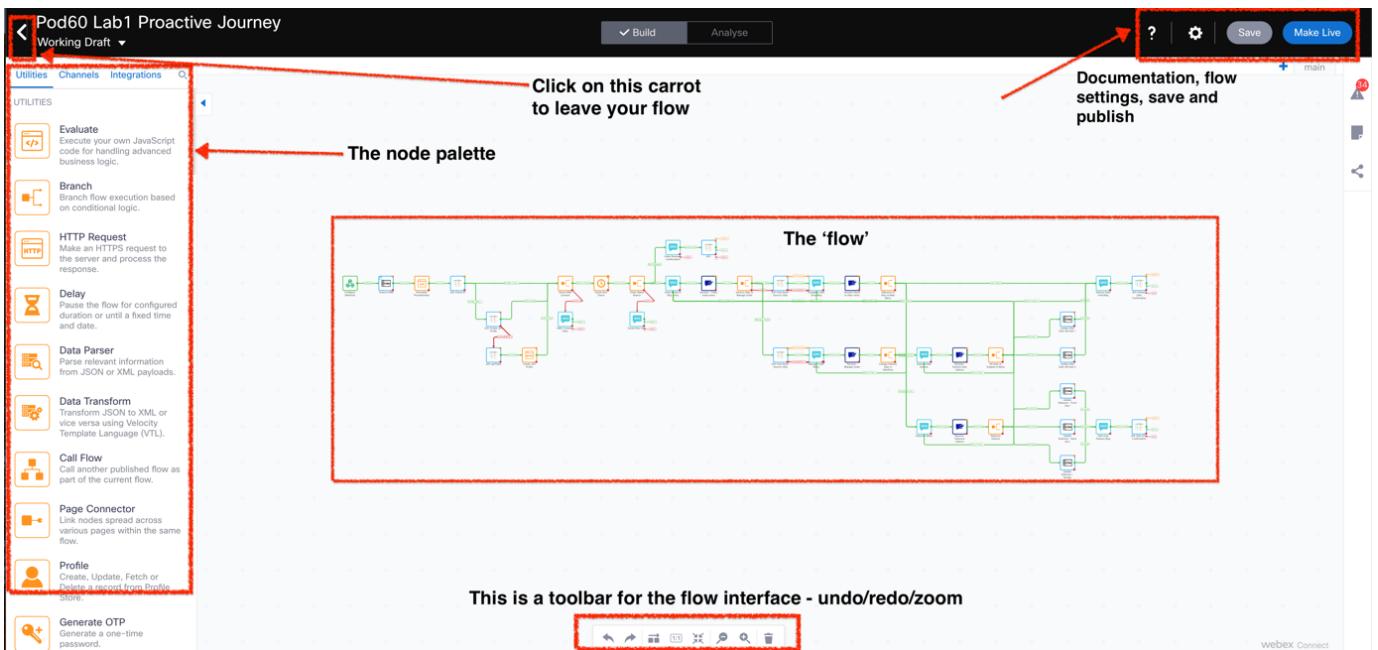
Click save frequently to save the work.

webex Connect



2.2.8 Goal 3 – Configuring the flow

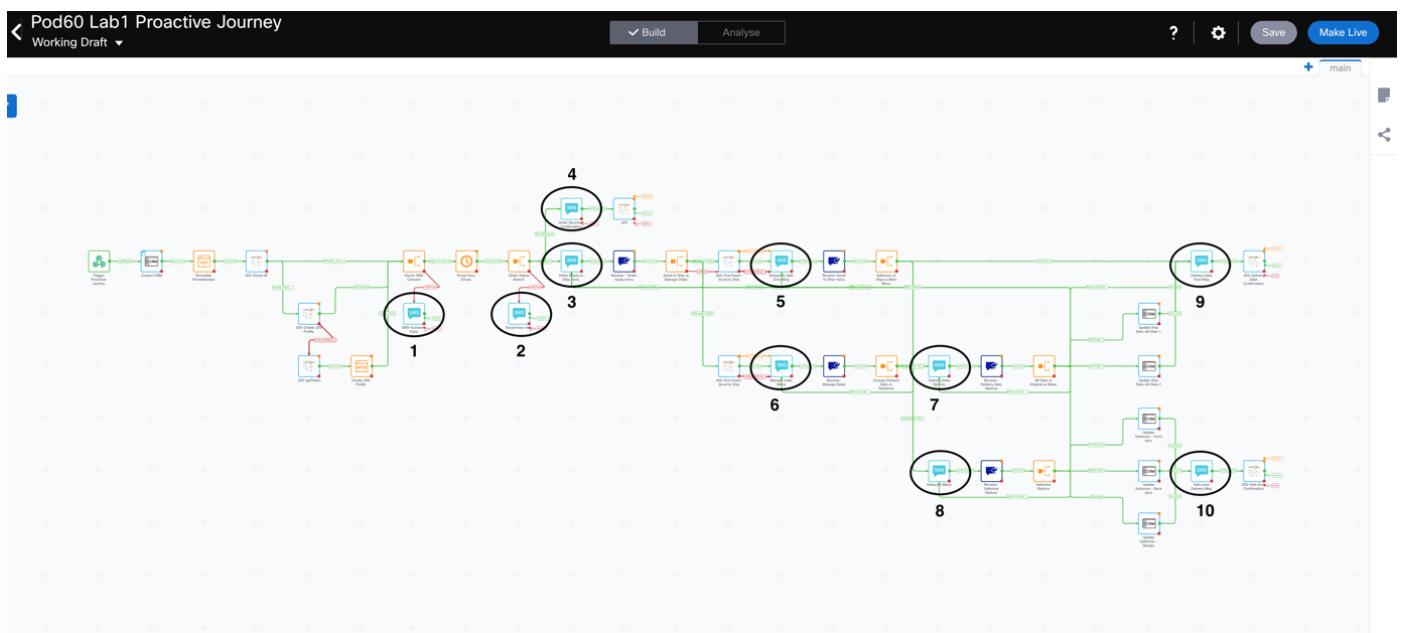
Orient yourself with the canvas/UI in Webex Connect and some key tools/functions (if you find yourself struggling, try our documentation page too @ help.webexconnect.io):



1. The first step is to identify the “SMS” nodes and modify them. The SMS node enables the brand to send outbound SMS message to their customers. The SMS node is indicated in the flow as below



2. The flow consists of 10 SMS nodes and each of the SMS node must be modified to include the SMS number. The power of WxConnect is its ability to create dynamic variables that makes the flow reusable. We will leverage a dynamic variable that stores the SMS number and assign this variable to the SMS nodes.



3. Open SMS node #1 as shown in step #2 by double clicking on the SMS node to open the configuration settings of this node.

SMS-Consent-False

Configuration **Transition Actions (Optional)** **Data Stream (Optional)**

Send short messages of upto 1024 characters

Destination Type ⓘ msisdn

From Number ⓘ Enter Mobile number e.g. 912912345678

Message Type Text

Message ⓘ Please change your consent to "true" This is the message to be sent in the SMS Characters remaining: 988

+ Add Smart Link

Shorten Links ⓘ

Correlation ID (Optional) ⓘ e.g., 763ae6f8-7a76-4661-a96d-939c330f2907

Notify URL (Optional) ⓘ Enter notify URL e.g. https://www.yoururl.com/data

Callback Data (Optional) ⓘ e.g., 63ae6f8-7a76-4661-a96d-939c330f2907

Extra Parameters (Optional)

Parameter ⓘ	Value ⓘ
SMS Node ID: 11	

Input Variables
List of variables available as input for this node

Custom Variables [F56416]
Start Node ID: 2
Custom CRM Node ID: 3
Evaluate Node ID: 4
JDS Node ID: 5
Branch Node ID: 6
JDS Node ID: 8
HTTP Request Node ID: 9
JDS Node ID: 124

Output Variables

Node Outcomes

- Observe the image from the above step and note that “From Number” is blank. This is one of the errors reported when you save the flow. As mentioned earlier in the guide, we will be using a variable called “yourAssignedSMSNumber” to dynamically store the number. This variable is already created for you. To add this variable, click on “From Number” to select the field and then expand the “Custom Variables” on the right of the node as shown below and then click on “yourAssignedSMSNumber” variable to add it to the “From Number” field. Click save to save the node config.

SMS-Consent-False

Configuration **Transition Actions (Optional)** **Data Stream (Optional)**

Send short messages of upto 1024 characters

Destination Type **msisdn** Destination **\$(msisdn)**

From Number **Enter Mobile number e.g. 912912345678** **Click the field to highlight it.**

Value is required

Message Type **Text**

Message **Please change your consent to "true"** **Characters remaining: 988**

+ Add Smart Link

Shorten Links

Correlation ID (Optional) **e.g., 763ae6f8-7a76-4661-a96d-939c330f2907**

Notify URL (Optional) **Enter notify URL e.g. https://www.yoururl.com/data**

Callback Data (Optional) **e.g., 63ae6f8-7a76-4661-a96d-939c330f2907**

Extra Parameters (Optional)

SMS Node ID: 11

Help

Input Variables [F56416]

Custom Variables

- updatedETA
- updatedSafeZone
- jdsWorkspaceld
- jdsBaseUrl
- yourAssignedSMSNumber**
- phoneNumber
- msisdn

+ Add New Custom Variable

Start Node ID: 2

Custom CRM Node ID: 3

Evaluate Node ID: 4

JDS Node ID: 5

Branch Node ID: 6

JDS Node ID: 8

HTTP Request Node ID: 9

JDS Node ID: 124

Output Variables

Node Outcomes

SMS-Consent-False

Configuration **Transition Actions (Optional)** **Data Stream (Optional)**

Send short messages of upto 1024 characters

Destination Type **msisdn** Destination **\$(msisdn)**

From Number **\$(yourAssignedSMSNumber)**

Message Type **Text**

Message **Please change your consent to "true"** **Characters remaining: 988**

+ Add Smart Link

Shorten Links

Correlation ID (Optional) **e.g., 763ae6f8-7a76-4661-a96d-939c330f2907**

Notify URL (Optional) **Enter notify URL e.g. https://www.yoururl.com/data**

Callback Data (Optional) **e.g., 63ae6f8-7a76-4661-a96d-939c330f2907**

Extra Parameters (Optional)

Parameter **Value**

SMS Node ID: 11

Help

Input Variables [F56416]

Custom Variables

- updatedETA
- updatedSafeZone
- jdsWorkspaceld
- jdsBaseUrl
- yourAssignedSMSNumber**
- phoneNumber
- msisdn

+ Add New Custom Variable

Start Node ID: 2

Custom CRM Node ID: 3

Evaluate Node ID: 4

JDS Node ID: 5

Branch Node ID: 6

JDS Node ID: 8

HTTP Request Node ID: 9

JDS Node ID: 124

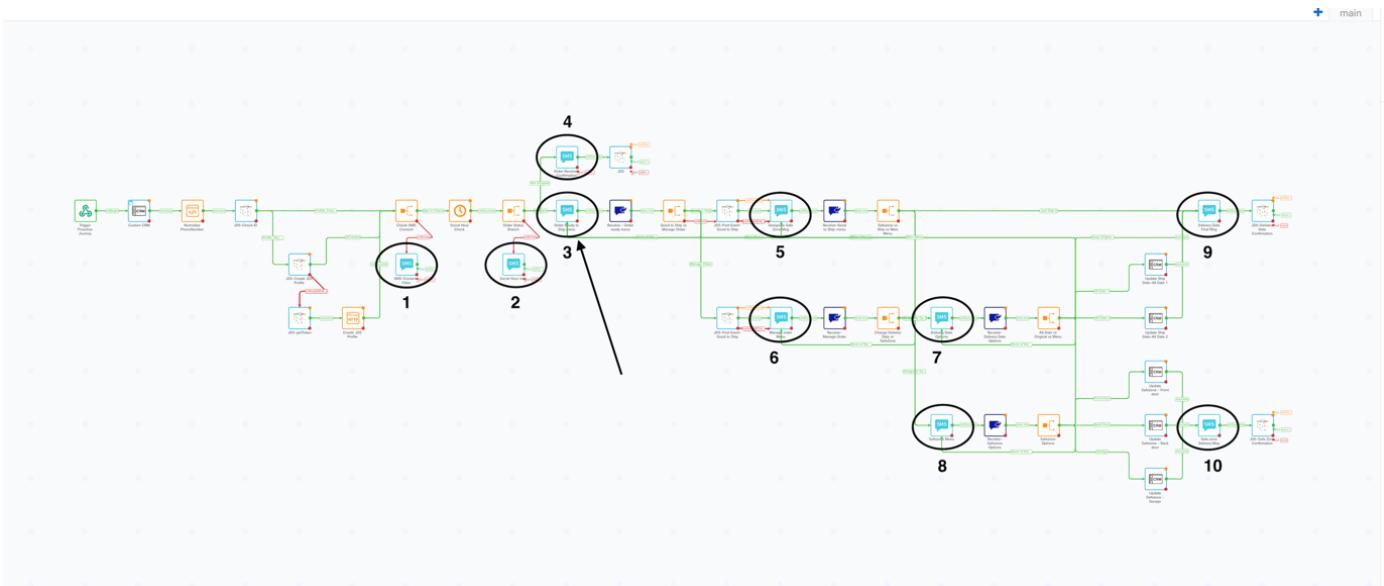
Output Variables

Node Outcomes

5. Repeat the above steps for all the other 9 SMS nodes.

6. Click save on the top right after completing step #5.

7. Let us now open the configuration of SMS node #3 to understand the “Template” concept.



8. In this node configuration, observe that we are not configuring the SMS message to be sent directly in the node, instead we are utilizing messaging templates.

Order Ready to Ship menu

Configuration **Transition Actions (Optional)** **Data Stream (Optional)**

Send short messages of upto 1024 characters

Destination Type: msisdn Destination: \$(msisdn)

From Number: \$(yourAssignedSMSNumber)

Message Type: Template

Message Configuration

Template: (dropdown menu)

Message body

Parameter Name: variable1 Value: \${n3.firstName}

Parameter Name: variable2 Value:

SMS
Node ID: 67

Input Variables
List of variables available as input for this node

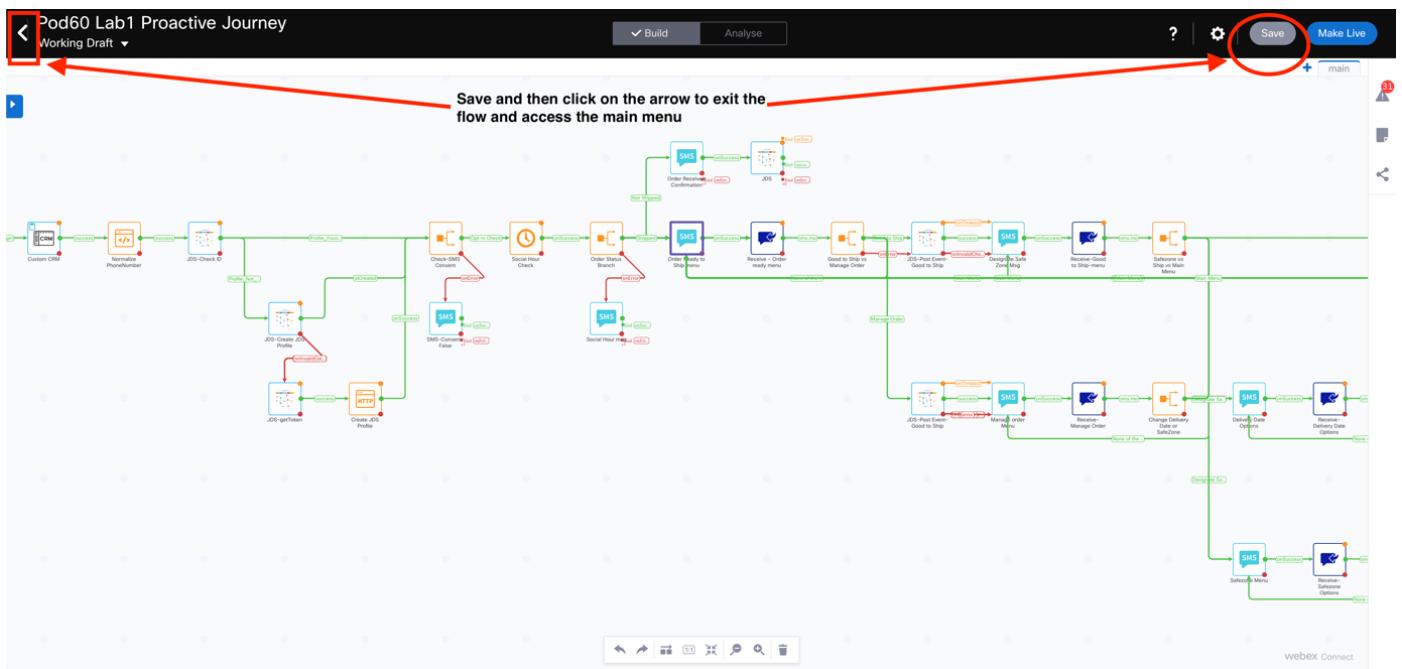
- Custom Variables [F56416]
- Start Node ID: 2
- Custom CRM Node ID: 3
- Evaluate Node ID: 4
- JDS Node ID: 5
- Branch Node ID: 6
- JDS Node ID: 8
- HTTP Request Node ID: 9
- Social Hour Check Node ID: 10
- Branch Node ID: 18
- Receive Node ID: 68
- Branch Node ID: 69
- SMS Node ID: 71
- Receive Node ID: 72
- Branch Node ID: 73
- SMS Node ID: 89

Output Variables

Node Outcomes

Typically, you can proceed in one of two ways – you can simply populate the message in the body of the SMS node, or you can leverage templates. For the purposes of this lab, we'll be going down the template path so that you not only understand how they work but also because it is often the case that customers don't use the same teams to devise messaging content and technical integrations / wiring up of a solution. Thus, templates allow business users or marketeers to still control and own a piece of the build process (that they can iterate on later) without impacting IT and creating backlog for simple copy changes.

9. To check out the templates, please save your work and navigate out of the flow canvas by clicking the carrot (or chevron, if you prefer) that navigates you back into your service – top left of the page:



Then click on the wrench in the menu panel to the left and select 'Templates'.

1. Hover over the wrench

Services - Pod 60
Click to edit service description. E.g., 'This service is for appointment reminders'.

Flow Builder

Flow builder is a visual designer with a library of nodes that you can drag and drop to create and test interactive customer journeys with little to no code.

Check out our guide to building flows here.

If you've got more questions after reading through it, just ask. We're always here to help.

Create Flow

Trigger	Flow	Status	State	Executions	Actions
NA	Pod60 Lab1 Proactive Journey Flow Id:56416	Draft		0	<input type="button" value="View"/>
NA	Lab1 Starter Flow Flow Id:56414	Draft		0	<input type="button" value="View"/>

Click on any pre-configured template to view the template configuration.

Channel	Name	ID	Type/Category	Action
SMS	Order_Received	FKTVLXCELI	SMS	<input type="button" value=""/>
SMS	Change_Menu	Q022EUMT0V	SMS	<input type="button" value=""/>
SMS	Delivery_Date_Confirmation	LVORMI66WM	SMS	<input type="button" value=""/>
SMS	Safe_Zone_Confirmation	A2RWWHJG8Z	SMS	<input type="button" value=""/>
SMS	Safe_Zone_Menu	FOOB81YUVB	SMS	<input type="button" value=""/>
SMS	Thank_You	LZ4OYHGM14	SMS	<input type="button" value=""/>
SMS	Final_Confirmation	GBFCWBMZU5	SMS	<input type="button" value=""/>

< Manage Template

Create dynamic templates for different channels and use them within Messaging API calls or flows.

Name

Channel

Message Type

Message

Hi \${variable1}, thank you for your purchase of a \${variable2}! We'll follow up with you once it is ready to be shipped.

+ Add Variable

Template Type (i)

Template ID

Lock this template to prevent other users to make changes

10. Now that we have seen the templates and the purpose of templates, let us get back to modifying the flow by clicking on the tile window on the left.

Templates
Create dynamic templates for different channels and use them within Messaging API calls or flows.

Add New Template

Channel	Name	ID	Type/Category	Action
SMS	Order_Received	FKTVLXCELI	SMS	
SMS	Change_Menu	Q022EUMT0V	SMS	
SMS	Delivery_Date_Confirmation	LVORMI66WM	SMS	
SMS	Safe_Zone_Confirmation	A2RWWHJG8Z	SMS	
SMS	Safe_Zone_Menu	FOOB81YUVB	SMS	
SMS	Thank_You	LZ4OYHGM14	SMS	
SMS	Final_Confirmation	GBFCWBMZU5	SMS	

Search the Pod and click on the Pod # that is assigned to you.

Services
Create workspaces for your business cases or customer journeys. You can create unlimited number of services.

Service metrics shown below are for last 30 days

Pod 60

0 0 0

Services - Pod 60
Click to edit service description. E.g., 'This service is for appointment reminders'.
Pod 60 Welcome, Admin sixty!
This is your service dashboard.
A service is a named workspace for managing all flows and rules related to a customer interaction/journey. Each service has a unique service key and JWT tokens that can be used for authentication when using messaging API, custom event API, and/or inbound webhooks.
Services can be locked from within the 'Settings' section to limit edit access.

API - JWT Credentials
Powerful multi channel REST APIs
Service ID:
Service Secret:
Run in Postman
Learn more about JWT authentication [click here](#)

Flows
Start quickly with one of our pre-built templates or start with a blank canvas.

Traffic
SMS: 0 0%
Messenger: 0 0%
Live Chat / In-App Messaging: 0 0%
WhatsApp: 0 0%
Email: 0 0%
Apple Messages for Business: 0 0%

Flows
Executions: [empty]
Messages Sent: [empty]

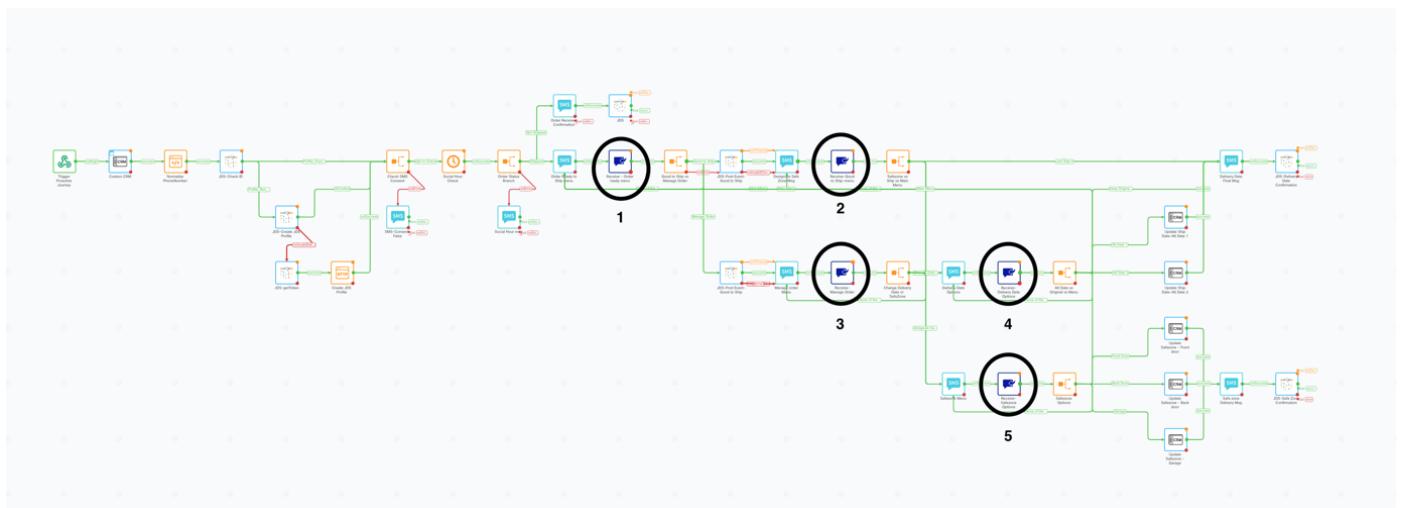
Messaging API
API Requests: 0
Messages Sent: 0

There will be two flows in your service, click on the flow “Pod# Lab1 Proactive Journey”.

11. As next step we must modify the “receive” nodes in the flow to add the sms numbers. Open each receive node explicitly and click save, to save the configuration. Receive nodes facilitate the brands to receive message or message replies from their customers. Receive nodes in the flow can be identified by the below image.



12. There are 5 receive nodes in the flow as identified below.



13. Open “Receive” node #1 identified in step #12 by double clicking on the node to verify the configuration and click save.

Receive - Order ready menu

Configuration **Transition Actions (Optional)** **Data Stream (Optional)**

Select a channel to wait for a message or a custom event to wait for an event

Max Timeout: 90

Receive SMS

Number: \$(yourAssignedSMSNumber)

Keyword: *

From Number: \$(msisdn)

SELECT INCOMING MESSAGE/EVENT

Channels

- Receive Voice**: An inbound voice on the number from the customer resumes the flow
- Receive MMS**: Event is triggered when a new MMS is received from the user on this channel
- Receive Messenger message / event**: Event is triggered when a new message is received from the user on this channel
- Receive WhatsApp message**: Resume flow on inbound WhatsApp message. The response message will be copied to 'sysResponseMessage'.
- Receive Custom Event**: Event is triggered when a new message is received from the user on this channel
- Receive Live Chat / In-App Messaging**: Resume flow on inbound Live Chat / In-App Messaging. The response message will be copied to 'sysResponseMessage'.
- Receive Email**: Resume flow on inbound email. The response message will be copied to 'sysResponseMessage'.
- Receive Apple Messages for Business**: Event is triggered when a new message is received from the user on this channel

Receive
Node ID: 68

Cancel Save

Input Variables
List of variables available as input for this node

- Custom Variables [F56416]
- Start Node ID: 2
- Custom CRM Node ID: 3
- Evaluate Node ID: 4
- JDS Node ID: 5
- Branch Node ID: 6
- JDS Node ID: 8
- HTTP Request Node ID: 9
- Social Hour Check Node ID: 10
- Branch Node ID: 18
- SMS Node ID: 67
- Branch Node ID: 69
- SMS Node ID: 71
- Receive Node ID: 72
- Branch Node ID: 73
- SMS Node ID: 89

Output Variables

Node Outcomes

14. Open all other “Receive” nodes to make sure the variable is set for the “Number” field and click save on each node.

15. If any of the “receive” node is not populated with the variable as shown below

Receive - Order ready menu

Configuration Transition Actions (Optional) Data Stream (Optional)

Select a channel to wait for a message or a custom event to wait for an event

Max Timeout
90

Receive SMS

Number ⓘ Select a Number Keyword ⓘ Select a keyword From Number ⓘ \$(msisdn)

Keyword is required

SELECT INCOMING MESSAGE/EVENT

Channels

- Receive Voice**
An inbound voice on the number from the customer resumes the flow
- Receive MMS**
Event is triggered when a new MMS is received from the user on this channel
- Receive Messenger message / event**
Event is triggered when a new message is received from the user on this channel
- Receive WhatsApp message**
Resume flow on inbound WhatsApp message. The response message will be copied to 'sysResponseMessage'.
- Receive Custom Event**
Event is triggered when a new message is received from the user on this channel
- Receive Live Chat / In-App Messaging**
Resume flow on inbound Live Chat / In-App Messaging. The response message will be copied to 'sysResponseMessage'.
- Receive Email**
Resume flow on inbound email. The response message will be copied to 'sysResponseMessage'.
- Receive Apple Messages for Business**
Event is triggered when a new message is received from the user on this channel

Receive
Node ID: 68

Cancel Save

Input Variables
List of variables available as input for this node

Custom Variables	[F56416]
Start	Node ID: 2
Custom CRM	Node ID: 3
Evaluate	Node ID: 4
JDS	Node ID: 5
Branch	Node ID: 6
JDS	Node ID: 8
HTTP Request	Node ID: 9
Social Hour Check	Node ID: 10
Branch	Node ID: 18
SMS	Node ID: 67
Branch	Node ID: 69
SMS	Node ID: 71
Receive	Node ID: 72
Branch	Node ID: 73
SMS	Node ID: 89

Output Variables

Node Outcomes

Click on the Number field and select “—Dynamic--” as shown below.

Receive - Order ready menu

Configuration Transition Actions (Optional) Data Stream (Optional)

Select a channel to wait for a message or a custom event to wait for an event

Max Timeout
90

Receive SMS

Number ⓘ Select a Number Keyword ⓘ Select a keyword From Number ⓘ \$(msisdn)

Keyword is required

Select “Dynamic”

SELECT INCOMING MESSAGE/EVENT

Channels

- Receive Voice**
An inbound voice on the number from the customer resumes the flow
- Receive MMS**
Event is triggered when a new MMS is received from the user on this channel
- Receive Messenger message / event**
Event is triggered when a new message is received from the user on this channel
- Receive WhatsApp message**
Resume flow on inbound WhatsApp message. The response message will be copied to 'sysResponseMessage'.
- Receive Custom Event**
Event is triggered when a new message is received from the user on this channel
- Receive Live Chat / In-App Messaging**
Resume flow on inbound Live Chat / In-App Messaging. The response message will be copied to 'sysResponseMessage'.
- Receive Email**
Resume flow on inbound email. The response message will be copied to 'sysResponseMessage'.
- Receive Apple Messages for Business**
Event is triggered when a new message is received from the user on this channel

Receive
Node ID: 68

Cancel Save

Input Variables
List of variables available as input for this node

Custom Variables	[F56416]
Start	Node ID: 2
Custom CRM	Node ID: 3
Evaluate	Node ID: 4
JDS	Node ID: 5
Branch	Node ID: 6
JDS	Node ID: 8
HTTP Request	Node ID: 9
Social Hour Check	Node ID: 10
Branch	Node ID: 18
SMS	Node ID: 67
Branch	Node ID: 69
SMS	Node ID: 71
Receive	Node ID: 72
Branch	Node ID: 73
SMS	Node ID: 89

Output Variables

Node Outcomes

Now expand the “Custom variables” located on the right hand side of the node and select “yourAssignedSMSNumber” as shown below.

Receive - Order ready menu

Configuration Transition Actions (Optional) Data Stream (Optional)

Select a channel to wait for a message or a custom event to wait for an event

Max Timeout: 90

Receive SMS

Number: \$(yourAssignedSMSNumber)

Keyword: Select a keyword (highlighted with a red box)

From Number: \$(msisdn)

Keyword is required

SELECT INCOMING MESSAGE/EVENT

Channels

- Receive Voice**: An inbound voice on the number from the customer resumes the flow
- Receive MMS**: Event is triggered when a new MMS is received from the user on this channel
- Receive Messenger message / event**: Event is triggered when a new message is received from the user on this channel
- Receive WhatsApp message**: Resume flow on inbound WhatsApp message. The response message will be copied to 'sysResponseMessage'.
- Receive Custom Event**: Event is triggered when a new message is received from the user on this channel
- Receive Live Chat / In-App Messaging**: Resume flow on inbound Live Chat / In-App Messaging. The response message will be copied to 'sysResponseMessage'.
- Receive Email**: Resume flow on inbound email. The response message will be copied to 'sysResponseMessage'.
- Receive Apple Messages for Business**: Event is triggered when a new message is received from the user on this channel

Receive Node ID: 68

Cancel Save

Input Variables

List of variables available as input for this node

Search [F56416]

Custom Variables

- updatedETA
- updatedSafeZone
- jdsWorkspaceId
- jdsBaseUrl
- yourAssignedSMSNumber** (highlighted)
- phoneNumber
- msisdn

+ Add New Custom Variable

Start Node ID: 2

Custom CRM Node ID: 3

Evaluate Node ID: 4

JDS Node ID: 5

Branch Node ID: 6

JDS Node ID: 8

HTTP Request Node ID: 9

Social Hour Check Node ID: 10

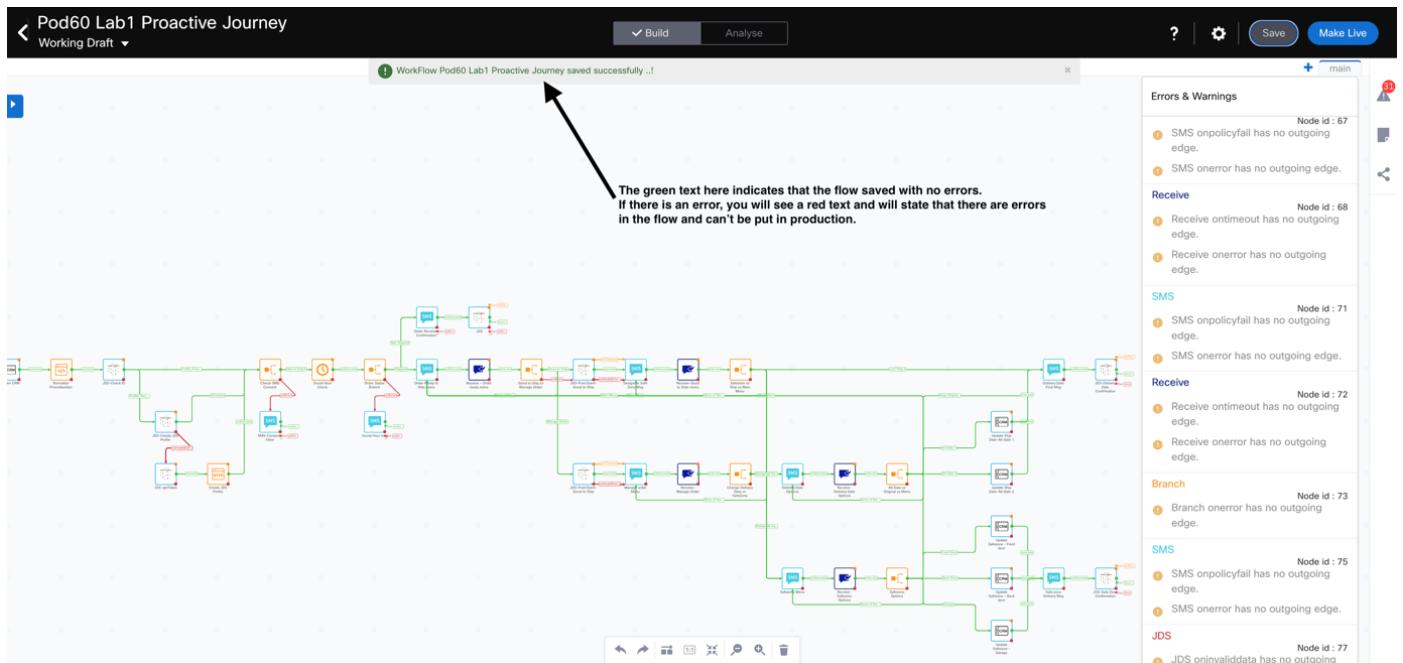
Branch Node ID: 18

Output Variables

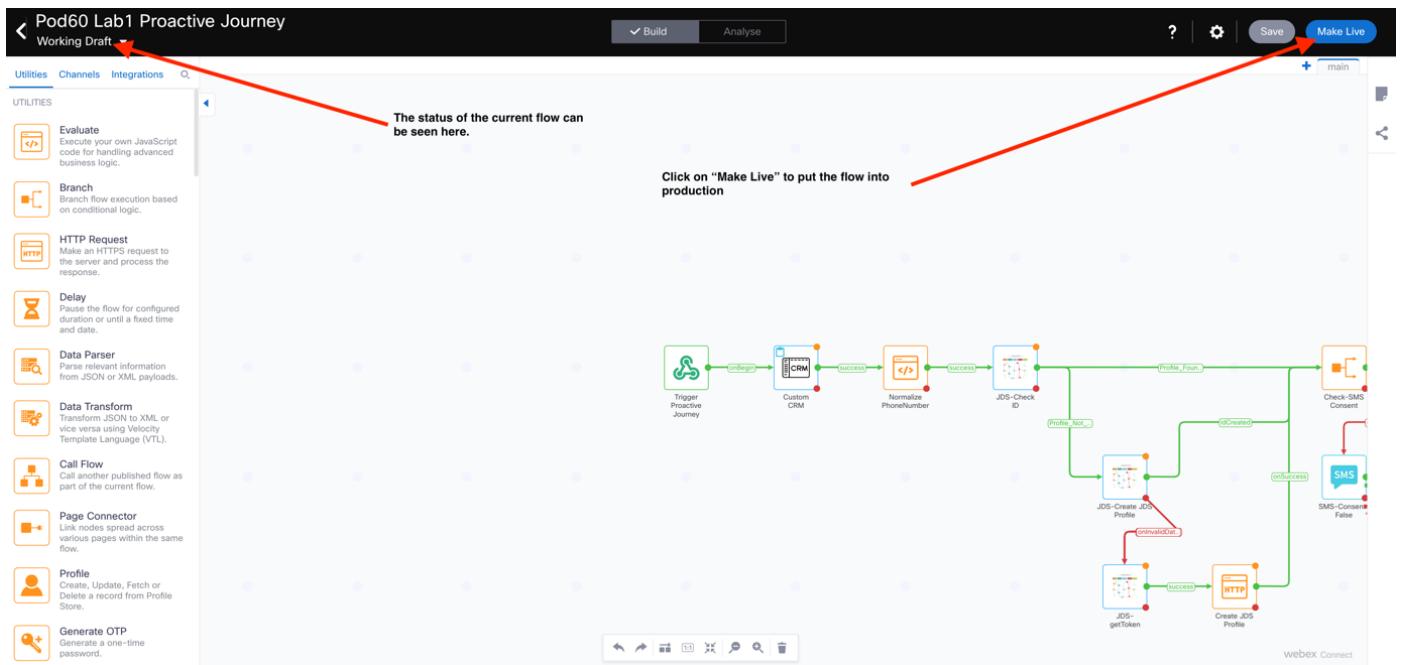
Node Outcomes

Now click on Keyword and select “*”. The “*” keyword allows to accept any message. Click “save” to save the configuration.

16. Click “Save” on the top right corner to save the entire flow and observe the errors and warnings. There should be no errors reported, however there will be warnings that we will ignore for this lab.



17. We are all set to put the flow into production. Click on “Make Live”.



18. Make live configuration is presented, where we will assign the actual SMS number to the dynamic variable. Click on “Numbers” and select the SMS number that you received in the text by scanning the QR code along with your credentials. In the example below, the assigned SMS number to Pod60 is 14087862126.

Pod60 Lab1 Proactive Journey - Make Live Configuration - Version 1 Help

Assets Configuration
Select apps and define values for custom variables or dynamic numbers that you have created in the flow. Apps will only need to be selected if you have used a send or a receive node and selected one of the app based channels such as Mobile/Web apps, Messenger, Email etc. Dynamic numbers will only be needed when you have one or more SMS receive node with a dynamic number selected.

Dynamic Number Selection

Type <input type="button" value="SMS"/>	Numbers <input type="button" value="Select"/> Select the number assigned to your pod
--	--

Custom Variables

Variable Name <input type="text" value="yourAssignedSMSNumber"/>	Value <input type="text" value="14087862126"/> Type in the number assigned to your pod.
---	---

Comments (Optional)

Free text comment can be added to each version of the flow.

Click “Make Live” to put the flow into production.

Cancel Make Live

Click on “Numbers” field and select the number that was assigned to your pod.

Note: - Please check the box against your assigned number only.

Pod60 Lab1 Proactive Journey - Make Live Configuration - Version 1

[Help](#)**Assets Configuration**

Select apps and define values for custom variables or dynamic numbers that you have created in the flow. Apps will only need to be selected if you have used a send or a receive node and selected one of the app based channels such as Mobile/Web apps, Messenger, Email etc. Dynamic numbers will only be needed when you have one or more SMS receive node with a dynamic number selected.

Dynamic Number Selection ⓘ

Type	Numbers
 SMS	<input style="width: 100%;" type="text" value="Select"/> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <input type="checkbox"/> Select All <input type="checkbox"/> 14087862126 <input type="checkbox"/> 14087862127 <input type="checkbox"/> 14087862130 <input type="checkbox"/> 14087862132 <input type="checkbox"/> 14087862138 </div>
Custom Variables ⓘ	
Variable Name	<input type="text" value="yourAssignedSMSNumber"/>
Comments (Optional) ⓘ	
First version of the flow	

[Cancel](#)[Make Live](#)

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Select apps and define values for custom variables or dynamic numbers that you have created in the flow. Apps will only need to be selected if you have used a send or a receive node and selected one of the app based channels such as Mobile/Web apps, Messenger, Email etc. Dynamic numbers will only be needed when you have one or more SMS receive node with a dynamic number selected.

Dynamic Number Selection ⓘ

Type	Numbers
 SMS	<input style="width: 100%;" type="text" value="14087862126 x"/> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <input checked="" type="checkbox"/> Select All <input checked="" type="checkbox"/> 14087862126 <input type="checkbox"/> 14087862127 <input type="checkbox"/> 14087862130 <input type="checkbox"/> 14087862132 <input type="checkbox"/> 14087862138 </div>
Custom Variables ⓘ	
Variable Name	<input type="text" value="yourAssignedSMSNumber"/>
Comments (Optional) ⓘ	
First version of the flow	

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Type your number in the format 1+\<phonenumber> as shown in the image below

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Assets Configuration
Select apps and define values for custom variables or dynamic numbers that you have created in the flow. Apps will only need to be selected if you have used a send or a receive node and selected one of the app based channels such as Mobile/Web apps, Messenger, Email etc. Dynamic numbers will only be needed when you have one or more SMS receive node with a dynamic number selected.

Dynamic Number Selection ⓘ

Type	Numbers
SMS	14087862126 x

Custom Variables ⓘ

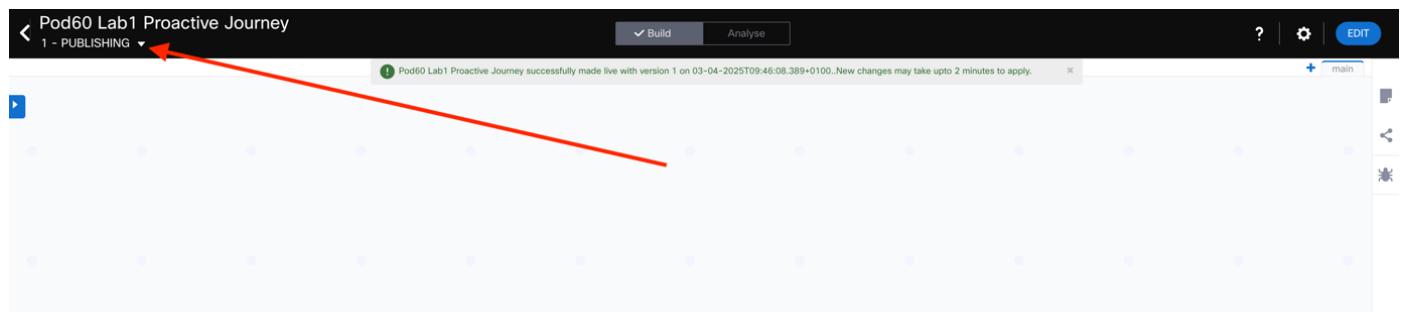
Variable Name	Value
yourAssignedSMSNumber	14087862126

Comments (Optional) ⓘ

First version of the flow

[Cancel](#) [Make Live](#)

19. Click “Make Live” to put the flow in production. Please note, the flow will take approximately 1 to 2 mins to be live. The status initially will show “Publishing” and will change to “Live” to indicate it is live and in production.



2.2.9 Goal 4 – Testing the Proactive Journey

It is now time to test the flow that we put in production. As mentioned previously in the lab guide, the flow that we built is triggered by certain notifications from the CRM or system of record updates. We will simulate this by creating this notification and keep your mobile phones ready, let us begin testing.

1. Open the flow that we put into production and double click on the first node “Trigger Proactive Journey”.



In the configuration window, locate the field named “Webhook URL” and the url is of the format <https://hooks.us.webexconnect.io/events/XXXXXXXXXX>. Copy the last part of the URL “XXXXXXXXXX” to test.

Trigger Proactive Journey

Configuration **Transition Actions (Optional)** **Data Stream (Optional)**

Configure webhook settings to trigger this flow

Select existing webhook Create new event

Webhook Name: Pod60 Lab1 Trigger

We've generated a new endpoint for you to send requests. [Learn more about using webhooks.](#)

Webhook URL: <https://hooks.us.webexconnect.io/events/2E9KAOQPTL>

Service key or JWT needs to be passed in request header if this option is selected

Validate signature

Connect can validate JSON signatures generated using SHA256 or SHA512 passed in the header. Invalid request will return a HTTP 400 error

Example Data

Paste Json Paste XML Send Via Hook

PROVIDE SAMPLE INPUT: `{ "orderId": "" }`

SELECT OUTPUT VARIABLES: `orderId`

PARSED VARIABLES(1): `orderId`

Output Variables Node Outcomes

Start Node ID: 2 Cancel

2. Open a web browser and login to <http://crm.cxocoe.us> with the credentials provided.

CRM Operations Get CRM Data Post CRM Data Update CRM Data Delete CRM Data Kick off Proactive Flow Welcome, Administrator Logout

CRM Operations Dashboard

Select an operation from the navigation bar above or use the quick links below.

Get CRM Data
Retrieve customer data from the CRM system using a phone number or order ID.
[Go](#)

Post CRM Data
Create new customer records in the CRM system.
[Go](#)

Update CRM Data
Modify existing customer records in the CRM system.
[Go](#)

Delete CRM Data
Remove customer records from the CRM system.
[Go](#)

Kick off Proactive Flow
Trigger webhook notifications using Order ID and Webhook Name.
[Go](#)

CRM Operations Dashboard © 2025

3. Click on “Kick off Proactive Flow”.

Kick off Proactive Flow

Enter an Order ID and Webhook Name to initiate a proactive notification flow.

Phone Number

Enter your phone number with country code ex:- 14081111111

Enter the order ID for the customer notification.

Webhook Id

Enter the text that was copied from the webhook url

Enter the webhook name to trigger for this notification.

Start Flow

Result

No flow initiated yet.

HTTP Response

Status Code

-

Headers

No response received yet.

Raw Response Body

No response received yet.

- Phone Number: *Enter your mobile number with country code. Ex: - 14081111111*
- Webhook Id: *Enter the copied text from step #1*

Then click on "Start Flow" to trigger the proactive journey.

Kick off Proactive Flow

Enter an Order ID and Webhook Name to initiate a proactive notification flow.

Phone Number

Enter the order ID for the customer notification.

Webhook Id

Enter the webhook name to trigger for this notification.

Start Flow

HTTP Response

Status Code

200 OK

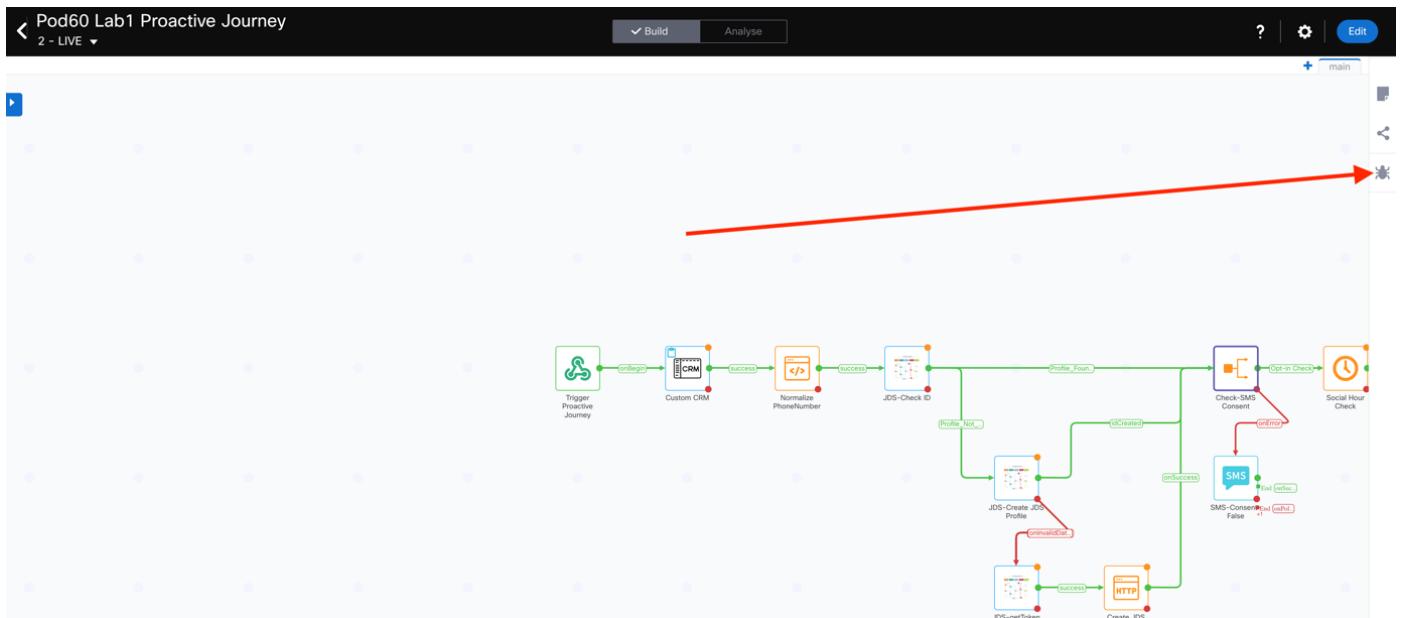
Headers

```
{
  "connection": "keep-alive",
  "content-length": "1207",
  "content-type": "application/json; charset=utf-8",
  "date": "Thu, 03 Apr 2025 09:14:08 GMT",
  "etag": "W/\"4b7-2wj1vCyZLG2HoGXMrBNvgW5jcm\\\"",
  "server": "nginx/1.18.0 (Ubuntu)",
  "x-powered-by": "Express"
}
```

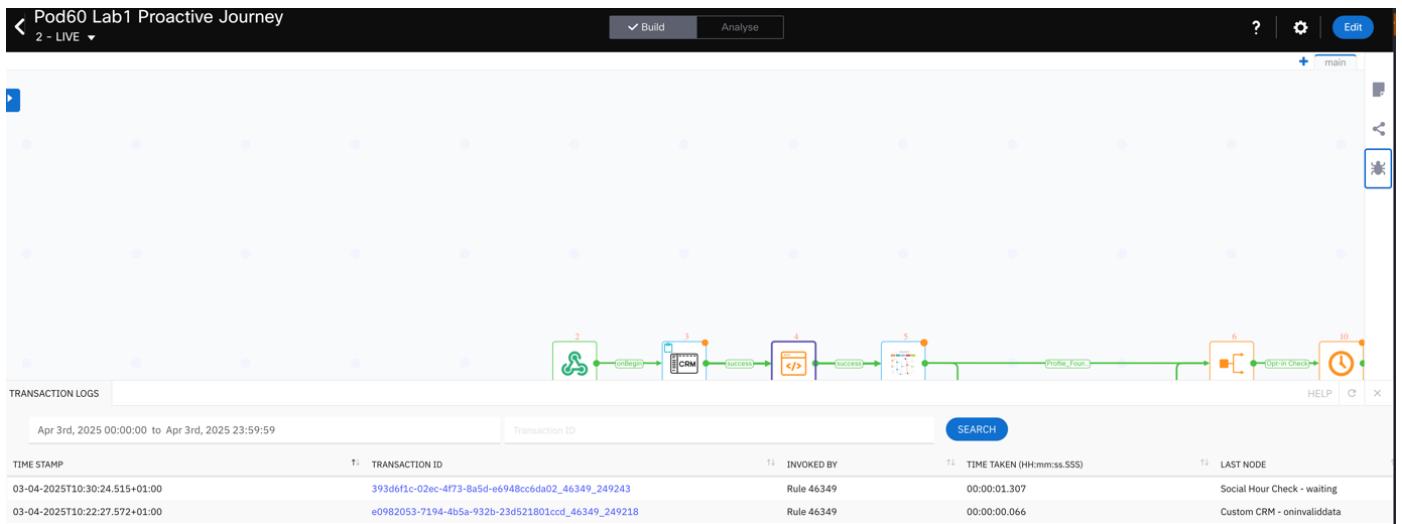
Raw Response Body

```
{"success":true,"message":"Successfully triggered 2E9KA0QPTL webhook for order 16509963785","orderId": "16509963785", "webhookName": "2E9KA0QPTL", "timestamp": "2025-04-03T09:14:08.952Z", "data": { "response": [ { "code": "1002", "description": "Queued", "transid": "eedf6de0-6088-4470-927a-e0b2c4c92f69" } ] }, "httpResponse": { "statusCode": 200, "statusMessage": "OK", "headers": { "date": "Thu, 03 Apr 2025 09:14:08 GMT", "connection": "keep-alive", "content-length": "1207", "content-type": "application/json; charset=utf-8", "etag": "W/\"4b7-2wj1vCyZLG2HoGXMrBNvgW5jcm\\\"", "server": "nginx/1.18.0 (Ubuntu)", "x-powered-by": "Express" } }}
```

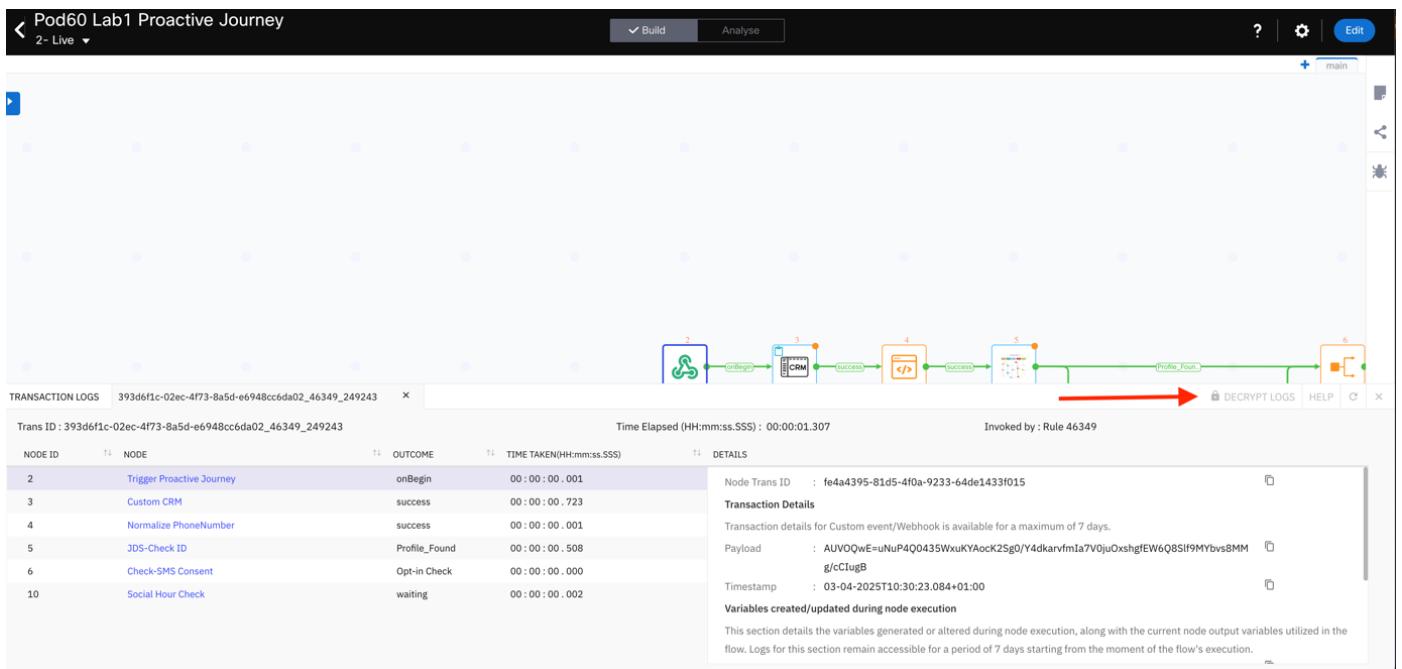
4. The flows provide debug capability to identify any issues with the configuration. The debug can be accessed by clicking on bug icon that is located on the right of the flow.



The debug window contains list of transaction id's that the flow has executed. Click on the appropriate transaction id to debug.



The debug output is encrypted by default. Click “Decrypt Logs” to view the logs in plain text.



5. You should have received a proactive notification on your mobile phone notifying you the purchase of a Core Trio Qi charger!

