Welcome

Single source of truth (SSOT) for product specs, system design, and FAQs.

Product Spec Library

This is the **Product Spec Library**. It is the single source of truth (SSoT) for product docs.

You can find the final product logic here. Avoid scattered info across PRDs, designs, Slack threads, and tribal knowledge.

Scope

* Product specs (PRDs / specs) and behavior definitions.
* System design (architecture, data flows, APIs, edge cases).
* Troubleshooting / FAQ (support cases, known limits, exception handling).
* Internal reference links to Help Center and tutorials.

{% hint style="info" %}
Principle: Every conclusion must be traceable to a source (PRD, design, ticket, doc link).
{% endhint %}

How to use it

* Use search to locate keywords and rules fast.
* Use module entry points to navigate: Feature Overview / System Design / Product Specs / FAQ.
* Align on current behavior and limits before scoping. Reduce rework.
* During debugging, check edge cases and past incidents first.

Common scenarios

* Presales / BD: confirm availability, limits, dependencies, and risks.
* CS / Support: locate actual behavior, compare with spec, and check known exceptions.
* PM / Tech lead: align cross-module logic. Avoid conflicting rules.
* Onboarding: follow module paths to learn the system and vocabulary.

Quick entry points

<table data-view="cards"><thead><tr><th>Module</th><th data-card-target data-type="content-ref">Entry</th></tr></thead><tbody><tr><td>Insights</td><td>insights</td></tr><tr><td>Audience</td><td>audience</td></tr><tr><td>Message center</td><td>message-center</td></tr><tr><td>Applications</td><td>applications</td></tr><tr><td>Automation</td><td>automation</td></tr><tr><td>Chat</td><td>chat</td></tr><tr><td>App marketing</td><td>app-marketing</td></tr><tr><td>API</td><td><a

href="api">api</td></tr><tr><td>MAAC General</td><td>maac-general</td></tr></tbody></table>

Doc maintenance guidelines (short)

* Write the conclusion and the rationale.
* Keep one latest version per rule.
* When behavior changes, update specs and FAQs first.

Insight

Feature Overview

System Design

Product Specifications

Troubleshooting & FAQ

insight_asana_history_knowledge_base_final

Investigation of Zero Tag Coverage in MAAC Data Insights

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2026-02-09
* **Asana Task ID:** [1213185386062836](https://app.asana.com/1/1184020052539844/task/1213185386062836)
* **Ticket Priority:** P1 - Very High
* **Client Name:** all brands
* **Resolution Owner:** Gideon
* **Result Breakdown:** Fix Problems

1. Issue Description

The MAAC data insights displayed zero tag coverage across all brands. Assistance was requested to investigate this anomaly.

2. Context & Details

* **Environment Conditions:**
  * Affected across multiple channels: LINE, Web, WhatsApp, EDM, Facebook, Instagram.
  * Issue has been occurring since the morning of the report date.
* **Reproduction Steps:**
  * The issue can be reproduced consistently.
* **Expected vs Actual Behavior:**
  * Expected: Tag coverage metrics should display accurate data.
  * Actual: Tag coverage metrics are showing zero for all brands.

3. Root Cause & Solution

* **Root Cause:**
  * The 'report_membertrenddailyreport' table, which is updated via an Airflow job, did not populate correctly, resulting in zero tag metrics. The root cause of the intermittent failure of the Airflow job is still under investigation.
* **Solution:**
  * The Airflow job was manually re-run to restore current data. Historical data for specific dates (e.g., January 11, December 25, December 28, September 1-9) has been backfilled. An ongoing investigation into the root cause of the Airflow job failure is underway, and a runbook is planned for future occurrences.

***

Investigation of Discrepancy in Acquired New Contacts Between Deeplink Report and Insight

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2026-01-14
* **Asana Task ID:**
[1212791162159401](https://app.asana.com/1/1184020052539844/task/1212791162159401)
* **Ticket Priority:** P4
* **Client Name:** Insurverse
* **Resolution Owner:** Tracy
* **Result Breakdown:** Too costly

1. Issue Description

The client observed a discrepancy in the number of acquired new contacts for 2025 between two reports:

* Deeplink Report shows 3,559 new contacts.
* Insight Acquisition shows 4,020 contacts.

The client requested clarification on which report is accurate and reliable.

2. Context & Details

* **Client Information:**
  * MAAC org id / CAAC org id: 4811
  * MAAC bot / CAAC channel ID: \[REDACTED]
* **Feature Information:**
  * Happened time: \[REDACTED]
  * Feature ID: \[REDACTED]
  * Reproducibility: \[REDACTED]
* **Reproduction Steps:**
  * Compare the number of new contacts in the Deeplink Report and Insight Acquisition for 2025.
* **Expected vs Actual Behavior:**
  * Expected: Consistent number of new contacts across both reports.
  * Actual: Discrepancy in the number of new contacts reported.

3. Root Cause & Solution

* **Root Cause:**
  * The discrepancy arises from the complex logic within the Insight system, which requires significant resources to address.
* **Solution:**
  * Current workaround: Advise clients to refer to the Deeplink page for accurate performance metrics.
  * Future consideration: The product team is evaluating the possibility of hiding incorrect deeplink reports on the Insight page. Further discussions on the scope are necessary.
* **Status:**
  * This is a known issue. The workaround has been communicated to Customer Support. The product team is discussing a long-term solution.

***

Investigation of Discrepancy in Message Count Between MAAC and LINE OA

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2026-01-13
* **Asana Task ID:**
[1212736080583740](https://app.asana.com/1/1184020052539844/task/1212736080583740)
* **Ticket Priority:** P3
* **Client Name:** iHerb
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

On January 7th, there was a significant discrepancy between the number of messages recorded by MAAC and those shown in the LINE OA native dashboard. MAAC displayed 87,616 messages sent, whereas LINE OA showed 148,968 messages. The client expressed concerns due to the usual alignment of message counts on other dates.

2. Context & Details

* **Date of Issue:** January 7th
* **MAAC Message Count:** 87,616
* **LINE OA Message Count:** 148,968
* **Client Actions:** The client was informed about the differing definitions of "Push" between MAAC and LINE OA. However, the client remains concerned due to the unusual discrepancy on this specific date.
* **Environment Checks:**
  * No use of automatic journeys, CAAC, or Open API was detected.
  * The client was advised to confirm with LINE OA support if any additional messages were sent.
* **Reproduction Steps:** Not applicable as the issue pertains to historical data.
* **Expected vs Actual Behavior:** Typically, MAAC and LINE OA message counts are closely aligned, but a significant difference was noted on January 7th.

3. Root Cause & Solution

* **Root Cause:** MAAC's internal records and analytics consistently indicate that 87,300 messages were sent on January 7th. Engineering confirmed there were no system issues or data discrepancies within MAAC for that date.
* **Solution:** The Customer Success team communicated to the client that MAAC's records consistently show 87,300 messages sent. No system issues were identified within MAAC. The discrepancy appears to be due to differing definitions or reporting methods between MAAC and LINE OA. Further verification with LINE OA support was suggested to the client.
* **Status:** Resolved

***

Investigation of Sudden Tag Coverage Drop to Zero

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2025-12-29
* **Asana Task ID:** [1212602245683188](https://app.asana.com/1/1184020052539844/task/1212602245683188)
* **Ticket Priority:** P3
* **Client Name:** \[REDACTED]
* **Resolution Owner:** David
* **Result Breakdown:** Fix Problems

1. Issue Description

The tag coverage rate in the LINE overview unexpectedly dropped to zero. Despite multiple tags being present in the tag list and no deletions being made by the brand, the data suddenly shows zero coverage.

2. Context & Details

* **Environment Conditions:**
  * The issue is observed across multiple brands.
  * The problem can be reproduced consistently.
* **Reproduction Steps:**
  1. Navigate to the LINE overview.
  2. Observe the tag coverage rate displayed as zero.
  3. Verify the presence of multiple tags in the tag list.
* **Expected vs Actual Behavior:**
  * **Expected:** The tag coverage rate should reflect the presence of multiple tags.
  * **Actual:** The tag coverage rate is displayed as zero despite the presence of tags.

3. Root Cause & Solution

* **Root Cause:** Data processing and aggregation errors led to incomplete data being recorded or displayed for specific daily breakdowns in the reporting module. This is similar to a previously identified data gap in insight processing.
* **Solution:** Await the resolution of a dependent "insight" processing task (referencing task ID 1212601716064139), which is expected to address this data gap. Verify data completeness after the dependent task is resolved. The status is currently pending, dependent on the resolution of the related task.

***

Investigation of Missing Data in Data Insights Report for December 26 and 27

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2025-12-29
* **Asana Task ID:** [1212601716064139](https://app.asana.com/1/1184020052539844/task/1212601716064139)
* **Ticket Priority:** P1 - Very High
* **Client Name:** N/A
* **Resolution Owner:** David
* **Result Breakdown:** Fix Problems

1. Issue Description

The Data Insights Report was missing data for December 26 and December 27, 2025. The report displayed data jumping directly from December 25 to December 28.

2. Context & Details

* **Environment Conditions:**
  * Organization ID: 5319
  * Bot ID: 4232
* **Reproduction Steps:**
  * Access the Data Insights Report for the specified dates.
  * Observe the absence of data for December 26 and 27.
* **Expected vs Actual Behavior:**
  * Expected: Continuous daily data from December 25 through December 28.
  * Actual: Data missing for December 26 and 27, with a direct jump from December 25 to December 28.

3. Root Cause & Solution

* **Root Cause:**
  * The Airflow DAG responsible for upserting daily report data from BigQuery to PostgreSQL either failed or did not run on December 26 and 27. This failure prevented the processed data from being written to the PostgreSQL reporting table.
* **Solution:**
  * Data for December 26 and 27 for all affected customers has been manually backfilled.
  * An alert system will be implemented to monitor for similar Airflow DAG failures to ensure prompt detection and resolution in the future.

***

Investigation of Data Discrepancy in Deeplink Reports

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2025-12-02
* **Asana Task ID:**
[1212213023126579](https://app.asana.com/1/1184020052539844/task/1212213023126579)
* **Ticket Priority:** P2
* **Client Name:** 長汎假期
* **Resolution Owner:** Tracy
* **Result Breakdown:** Too costly

1. Issue Description

The MAAC "Insight" module displayed incorrect data for "Deeplink" contacts, showing discrepancies when compared to the "Deeplink Report."

2. Context & Details

* **Environment Conditions:**
  * MAAC org id: 5398
  * MAAC bot/channel ID: 4295
  * Happened time: 2025/12/02
  * Reproducibility: Yes
* **User Questions:**
  * Why is there a discrepancy between the "Insight" module and the "Deeplink Report"?
* **Reproduction Steps:**
  1. Access the MAAC "Insight" module.
  2. Compare the displayed "Deeplink" contact data with the "Deeplink Report" for the period 2025/10/04 - 2025/10/31.
* **Expected vs Actual Behavior:**
  * Expected: Consistent data between "Insight" and "Deeplink Report."
  * Actual: Inconsistent data, with "Insight" showing outdated contact information.

3. Root Cause & Solution

* **Root Cause:**
  * There is a known systemic data inconsistency within the MAAC "Insight" module. This issue is due to a lack of resources for a permanent fix.
* **Solution:**
  * The reported "Insight" data was manually corrected to align with the "Deeplink Report."
  * It is recommended that the product manager considers temporarily hiding the affected "Insight" data until a systemic fix is implemented to prevent further manual adjustments.

Status: The data has been manually corrected; however, the systemic issue remains pending resolution.

***

Investigation of Discrepancy in Customer ID Binding Rates

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2025-11-27
* **Asana Task ID:** [1212207562464141](https://app.asana.com/1/1184020052539844/task/1212207562464141)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client observed a discrepancy between the number of unique users tagged for "account binding" (773) and the number of new Customer IDs (CIDs) created (260) between 10/28 and 11/13. The expectation was for these numbers to align.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 5319
  * MAAC bot ID: 4232
* **User Questions:**
  * Why is there a significant difference between the tagged users and new CIDs?
* **Reproduction Steps:**
  * Set up automatic processes triggered by the addition of an "account binding" tag.
  * Compare the number of unique users tagged with the number of new CIDs.
* **Expected vs Actual Behavior:**
  * Expected: The number of tagged users and new CIDs should match.
  * Actual: 773 users were tagged, but only 260 new CIDs were created.

3. Root Cause & Solution

* **Root Cause:**
  * Internal system checks confirmed that the insight page and contact CID counts are accurate and consistent. The discrepancy likely arises because the "account binding" tag, used to trigger journeys, does not strictly reflect the actual completion or presence of a Customer ID in the system. There is a misalignment between the customer's tag application logic and the system's CID binding logic.
* **Solution:**
  * Confirm the customer's tag application logic aligns with the system's CID binding logic. Adjust the tagging process to ensure it accurately reflects the creation of new CIDs.

***

Investigation of Data Discrepancy in MAAC Acquisition Dashboard

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2025-11-18
* **Asana Task ID:** [1211976775930269](https://app.asana.com/1/1184020052539844/task/1211976775930269)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Jalex
* **Result Breakdown:** Fix Problems

1. Issue Description

The MAAC acquisition dashboard displayed a discrepancy on 2025-11-07, where the Deeplink member count was shown as 160, but the downloaded report indicated only 7 new members and a total of 61 clicks. This inconsistency raised questions about whether it was due to a product definition issue or a UI display error.

2. Context & Details

* **Environment Conditions:**
  * Date of discrepancy: 2025-11-07
  * Dashboard shows 160 members
  * Report shows 7 new members and 61 total clicks
* **User Questions:**
  * Is the discrepancy due to a product definition issue or a UI display error?
* **Reproduction Steps:**
  * Access the MAAC acquisition dashboard for 2025-11-07
  * Compare the member count with the downloaded report
* **Expected vs Actual Behavior:**
  * Expected: Consistent member count between dashboard and report
  * Actual: Dashboard shows 160 members, report shows 7 new members

3. Root Cause & Solution

* **Root Cause:**
  * The discrepancy is due to the MAAC acquisition dashboard's complex and legacy data pipeline, which incorrectly aggregates Deeplink member data. The precise logic error is currently untraceable.
* **Solution:**
  * The incorrect data for 2025-11-07 on the dashboard was manually corrected.
  * A fundamental fix requires redesigning the entire insight page data architecture, which is planned for future development.
  * Customers should be advised to use the Deeplink report for accurate performance metrics in the interim.

***

Investigation of Unresponsive "View Send Record" Button in MAAC SMS+ Insight

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2025-10-29
* **Asana Task ID:** [1211780759562084](https://app.asana.com/1/1184020052539844/task/1211780759562084)
* **Ticket Priority:** P2
* **Client Name:** N/A
* **Resolution Owner:** Jack Lee

* **Result Breakdown:** Fix Problems

1. Issue Description

The "View Send Record" button on the MAAC SMS+ Insight page was unresponsive, failing to redirect users to the message record page.

2. Context & Details

* The issue occurred on the MAAC SMS+ Insight page.
* Clicking the "View Send Record" button did not trigger any action.
* The problem was reproducible across all client environments.
* Attempts to resolve the issue using incognito mode were unsuccessful.
* No specific time or feature ID was provided for when the issue occurred.

3. Root Cause & Solution

Root Cause: The frontend URL for the "View Send Record" button was incorrectly configured. This was an oversight from previous SMS+ API development.

Solution: The incorrect frontend URL was corrected and deployed to production. The button now successfully redirects users from the SMS+ Insight page to the SMS+ Message Record Query page.

***

Investigation of Incorrect Auto-Reply Name in Weekly Report

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2025-10-21
* **Asana Task ID:** [1211693894670618](https://app.asana.com/1/1184020052539844/task/1211693894670618)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Jack Lee, Jalex
* **Result Breakdown:** Fix Problems

1. Issue Description

The client reported that the weekly report displayed an incorrect name for the auto-reply. Although the auto-reply name was updated in mid-September, the report received on 10/20 still showed the old name.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 6148
  * MAAC bot/channel ID: 5874
  * Happened on: 10/20/2025
  * Reproducibility: Yes
* **User Questions:**
  * Why does the weekly report still show the old auto-reply name despite the update?
* **Reproduction Steps:**
  1. Update the auto-reply name in the MAAC system.
  2. Generate and review the weekly report.
* **Expected vs Actual Behavior:**
  * **Expected:** The weekly report should display the updated auto-reply name.
  * **Actual:** The report displayed the old auto-reply name.

3. Root Cause & Solution

* **Root Cause:**
  * The issue was identified as a legacy synchronization bug. When the primary name of an auto-reply was updated, its internal "channel setting" name, which is no longer actively used, was not synchronized. The weekly report referenced this unsynced internal name, resulting in outdated information.
* **Solution:**
  * The auto-reply name was manually corrected for the client.
  * A fix was implemented to ensure synchronization of auto-reply name updates across all internal settings. The relevant pull request can be found [here](https://github.com/chatbotgang/rubato/pull/9976).
  * Further actions include auditing and correcting all other existing auto-replies with unsynced names.
* **Status:** Fixed.

***

Investigation of Non-Unique Click Counts in Broadcast Messages

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2025-10-01
* **Asana Task ID:** [1211518421816701](https://app.asana.com/1/1184020052539844/task/1211518421816701)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported that unique click counts for multiple broadcast messages in September were identical, raising concerns about a potential display bug. Additionally, one broadcast message showed a click count of zero, prompting further investigation into possible display errors.

2. Context & Details

* **Environment Conditions:**
  * MAAC org: 199
  * MAAC bot: 376
  * Feature ID: \[REDACTED_UUID]
  * Happened time: 9/30
* **User Questions:**
  * Why do multiple broadcast messages have the same unique click count?
  * Is the zero click count for one broadcast a display bug?
* **Reproduction Steps:**
  * Review broadcast messages from September.
  * Check unique click counts for specified messages.
* **Expected vs Actual Behavior:**
  * **Expected:** Each broadcast message should have a distinct unique click count.
  * **Actual:** Multiple messages showed identical unique click counts, and one message displayed a zero click count.

3. Root Cause & Solution

* **Root Cause:**
  * The unique clicks are tracked using GA4 and UTM parameters. The client used the same UTM combination across different broadcasts, leading GA4 to aggregate the data. This is expected behavior for UTM tracking.
* **Solution:**
  * The Customer Success Manager (CSM) confirmed the issue was due to incorrect UTM usage. Clients were advised to use unique UTM parameters for each campaign to ensure separate tracking. The issue was closed after clarification.

***

Investigation of Zero Tag Coverage on Insight Page for All Brands

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2025-09-22
* **Asana Task ID:** [1211426159186280](https://app.asana.com/1/1184020052539844/task/1211426159186280)
* **Ticket Priority:** P2
* **Client Name:** all
* **Resolution Owner:** Leo

* **Result Breakdown:** Limit information

1. Issue Description

During the period from 2025-09-01 to 2025-09-09, the Tag Coverage displayed on the Insight Page was zero for all TH accounts.

2. Context & Details

* **Environment Conditions:**
  * Affected all TH accounts.
  * Issue observed during the specified date range.
* **Reproduction Steps:**
  * Random checks on TH accounts confirmed the zero Tag Coverage.
* **Expected vs Actual Behavior:**
  * Expected: Tag Coverage should display accurate data.
  * Actual: Tag Coverage displayed as zero.
* **Additional Information:**
  * Clients Basic Information: MAAC org id / CAAC org id, MAAC bot / CAAC channel ID.
  * Feature Information: Happened time, Feature ID.
  * Reproducibility: Not specified.
  * Screenshots or screen records were provided.

3. Root Cause & Solution

* **Root Cause:** An oversight occurred during a member health data pipeline rerun from 2025-09-01 to 2025-09-10, leading to incorrect historical Tag Coverage. The product logic was verified to be correct.
* **Solution:** The issue has been resolved, and the current data is accurate. There is no plan to correct the historical data for the affected period. Customers are advised to refer to recent data. The incident has been documented internally.

***

Investigation of Discrepancy in Customer ID Binding Rate on MAAC LINE Overview

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2025-09-15
* **Asana Task ID:** [1211358426495869](https://app.asana.com/1/1184020052539844/task/1211358426495869)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Fix Problems

1. Issue Description

The client reported a significant discrepancy in the "Customer ID binding rate" displayed on the MAAC LINE overview for September 10-11. The system showed 7058 new bound contacts, whereas the client's internal data indicated only approximately 1200 new bindings for the same period.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 1732
  * MAAC bot/channel ID: 1411
* **User Questions:**
  * Why is there a discrepancy between the MAAC data and internal records?
* **Reproduction Steps:**
  * Review the "Customer ID binding rate" on the MAAC LINE overview for the specified dates.
* **Expected vs Actual Behavior:**
  * Expected: The number of new bound contacts should match internal records.
  * Actual: MAAC displayed 7058 new bindings, while internal data showed approximately 1200.

3. Root Cause & Solution

* **Root Cause:**
  * A bug in the MAAC Insight page caused incorrect reporting of the "bound contacts" metric.
* **Solution:**
  * The bug was fixed on September 11. Historical data could not be re-attributed by day to the original dates, so all previously miscounted or accumulated binding data was consolidated and reflected as an increase on September 11. Data from September 12 onwards is now accurate and aligns with the client's expectations.
* **Actionable Steps:**
  * The Customer Success Manager should communicate this explanation to the client.

***

Investigation of Membership Binding Anomalies in Data Insights

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2025-09-15
* **Asana Task ID:**
[1211356786872970](https://app.asana.com/1/1184020052539844/task/1211356786872970)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]

* **Resolution Owner:** Tracy
* **Result Breakdown:** Limit information

1. Issue Description

Between September 1 and September 10, there was an unexpected negative growth in brand binding data, decreasing from 934,746 to 934,079. On September 11, there was a sudden increase of over 3,000, resulting in a count of 933,306. This fluctuation was unexpected as no adjustments were made to the brand binding process.

2. Context & Details

* **Environment Conditions:**
  * The issue was observed in the Data Insights LINE Overview.
  * The client uses the "Update contact" feature for membership binding.
* **User Questions:**
  * Is there a way to investigate the cause of these fluctuations?
  * Could the fluctuations be due to delayed statistics, as experienced in the past?
* **Reproduction Steps:**
  * Review the customer_id trends in Data Insights daily records.
  * Compare the binding and unbinding behavior over the specified period.
* **Expected vs Actual Behavior:**
  * **Expected:** Consistent daily binding numbers without significant fluctuations.
  * **Actual:** A decrease followed by a sudden increase in binding numbers, not aligning with explicit unbind requests.

3. Root Cause & Solution

* **Root Cause:**
  * The "bound contacts" metric in Data Insights likely counts only "valid/active contacts" with a customer_id. User blocks (unfriending) would reduce "valid/active contacts", explaining the discrepancy from explicit unbind data. The fluctuation on September 11 suggests data update delays or batch processing.
* **Solution:**
  1. Confirm the precise definition of "bound contacts" in Data Insights and if it filters for "valid/active contacts".
  2. Investigate data update mechanisms for "valid/active contacts" and customer_id counts for potential delays.
  3. If "valid contacts" are indeed counted, communicate that user blocks contribute to the observed discrepancies.

***

Investigation of Open Rate Hotspot Discrepancies in MAAC Insight

Metadata

* **Feature:** MAAC-Insight

* **Created At:** 2025-09-15
* **Asana Task ID:** [1211353841908307](https://app.asana.com/1/1184020052539844/task/1211353841908307)
* **Ticket Priority:** P2
* **Client Name:** 台灣優衣庫有限公司-UNIQLO（2025）
* **Resolution Owner:** JY
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

Uniqlo's MAAC Insight page initially showed open rate hotspots only on Fridays, despite high open rates also occurring on Mondays. This was observed during their initial onboarding period.

2. Context & Details

* **Environment Conditions:**
  * Uniqlo sends push notifications regularly on Mondays and Fridays.
  * Observed open rate hotspots were concentrated on Tuesdays and Thursdays.
* **User Questions:**
  * Why are the open rate hotspots not aligning with the push notification schedule?
  * Could there be a delay in data reporting affecting the hotspot display?
* **Reproduction Steps:**
  * Review MAAC Insight data for open rate hotspots.
  * Compare with Uniqlo's internal tracking and Google Analytics data.
* **Expected vs Actual Behavior:**
  * **Expected:** Open rate hotspots should align with the days push notifications are sent (Mondays and Fridays).
  * **Actual:** Hotspots were observed on the following days (Tuesdays and Thursdays).

3. Root Cause & Solution

* **Root Cause:**
  * The anomaly was likely due to temporary data accumulation and calibration delays during the early onboarding phase of a new MAAC account.
* **Solution:**
  * The data has since normalized and now accurately reflects open rate hotspots on both Mondays and Fridays. No specific fix was required.
  * Future monitoring will be conducted to identify similar issues with new clients.

***

Investigation of Mapping Count Recognition Failure for Customer ID

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2025-09-11
* **Asana Task ID:**
[1211314354463888](https://app.asana.com/1/1184020052539844/task/1211314354463888)
* **Ticket Priority:** P2
* **Client Name:** Fits corporation
* **Resolution Owner:** Leo
* **Result Breakdown:** Fix Problems

1. Issue Description

The client completed importing over 1,500 customer ID entries into contacts on 9/3. However, the MAAC dashboard has not updated the mapping counts of customer IDs since 7/9.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 27
  * MAAC bot ID: 26
* **Reproduction Steps:**
  * Import customer ID information into contacts.
  * Check the MAAC dashboard for updated mapping counts.
* **Expected vs Actual Behavior:**
  * Expected: The MAAC dashboard should reflect updated mapping counts post-import.
  * Actual: The dashboard has not updated since 7/9 despite the import on 9/3.
* **Additional Information:**
  * The issue affects multiple clients on both TW and JP servers.
  * Insight page updated on 9/10 at 0:00, while customer_id data was logged on 9/8.

3. Root Cause & Solution

* **Root Cause:** A minor bug was introduced during a recent Airflow optimization, affecting the display of "Customer ID binding rate" on the MAAC insight page.
* **Solution:** The bug in Airflow was corrected, and affected data processing jobs were re-run. Verification confirmed that data for impacted organizations (MAAC org 5109, org 27) and the specific client is now accurate on the MAAC insight page. The issue is resolved.

***

Investigation of Auto-Reply Ranking Display in Insight Reports

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2025-09-09

* **Asana Task ID:** [1211298009313561](https://app.asana.com/1/1184020052539844/task/1211298009313561)
* **Ticket Priority:** P2
* **Client Name:** 長汎假期
* **Resolution Owner:** Aaren
* **Result Breakdown:** Fix Problems

1. Issue Description

The client observed that the auto-reply rankings in the Insight interaction report displayed only three entries and sought clarification on the cause.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 5398
  * MAAC bot/channel ID: 4295
  * Issue occurrence date: 2025-09-09
* **User Questions:**
  * Why are only three auto-reply rankings displayed in the report?
* **Reproduction Steps:**
  * Access the Insight interaction report.
  * Review the auto-reply rankings section.
* **Expected vs Actual Behavior:**
  * Expected: All configured auto-reply rankings should be displayed.
  * Actual: Only three auto-reply rankings are visible.

3. Root Cause & Solution

* **Root Cause:**
  * The backend query for auto-reply engagement data incorrectly included message editor settings. The API response lacked a unique ID, causing the frontend to group distinct message and message editor entries under the same keyword. The product definition excludes message editor data from auto-reply reports.
* **Solution:**
  * The backend logic was updated to exclude message editor data from auto-reply engagement reports. This adjustment ensures accurate auto-reply rankings, aligning with product definitions. Additionally, a separate task is planned for the removal of a related legacy API.
* **Status:**
  * The issue has been resolved and verified.

***

Investigation of Message Discrepancy Between MAAC and LINE CMS

Metadata

* **Feature:** MAAC-Insight
* **Created At:** 2025-09-08
* **Asana Task ID:**
[1211285609853706](https://app.asana.com/1/1184020052539844/task/1211285609853706)
* **Ticket Priority:** P2
* **Client Name:** Raipirab
* **Resolution Owner:** David, Leo
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported a significant discrepancy in the number of pushed messages between the MAAC dashboard and LINE CMS for the period of August 5 to September 5, 2025. The MAAC dashboard showed 15,752 messages, while LINE CMS reported 11,666 messages. The client requested clarification on why the MAAC message count was higher and sought guidance on checking the number of reply messages sent from MAAC.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 5338
  * MAAC bot/channel ID: 4248
  * Period: August 5 - September 5, 2025
* **User Questions:**
  * Why is there a discrepancy in message counts between MAAC and LINE CMS?
  * How can the number of reply messages sent from MAAC be verified?
* **Reproduction Steps:**
  * Compare the "Message Pushed" count on the MAAC dashboard with the "Pushed Message" count on LINE CMS for the specified period.
* **Expected vs Actual Behavior:**
  * Expected: The message counts on both platforms should align.
  * Actual: MAAC reported 15,752 messages, while LINE CMS reported 11,666 messages.

3. Root Cause & Solution

* **Root Cause:**
  * The discrepancy arises from a definitional difference. MAAC's "Message Pushed" metric includes both push and reply messages, whereas LINE CMS counts only push messages for billing purposes.
* **Solution:**
  * Rename the MAAC dashboard metric from "Message Pushed" to "Total Messages Sent" to accurately reflect the inclusion of both push and reply messages.
  * Consider adding separate metrics for "Push Messages" and "Reply Messages" on the MAAC dashboard for increased clarity.

* Advise clients to use LINE CMS for billing purposes and MAAC for raw push message data verification.

Contacts

聯絡人

Feature Overview

Tutorials | MAAC Contacts – Crescendo Lab Help Center

Feature Overview | Contact Management & Classification

In the MAAC system, contacts are classified based on data sources and interaction channels into four main types:

Contact Type	Definition	Available Interactions	Notes
LINE Contact	Users who have added the brand's LINE Official Account (LINE OA)	Use MAAC features such as LINE push messages and auto-replies; initiate real-time chat via CAAC	Can interact and segment via the LINE OA
Facebook Messenger Contact	Facebook users who have previously chatted with the brand's fan page	Send Messenger messages and configure auto-replies	Requires Facebook channel connection and authorization
Instagram Contact	Users who have interacted with the brand's IG Business Account (e.g. DM, story replies)	Use Instagram auto-reply features	Requires Instagram channel connection and authorization
Other Contact	Users with only a phone number	Can only receive SMS campaigns	Cannot interact via LINE, Facebook, or Instagram

Recommended Usage

* Search, view, and manage all contacts (including LINE, FB, IG, and phone contacts)
* Import/export data and batch add/remove tags
* Launch real-time chat with LINE contacts (requires login to CAAC)
* Send SMS messages for campaigns, promotions, or binding notifications

Additional Notes

* All contact types are displayed in **MAAC > Contact Management**, and can be searched, tagged, edited, imported, or exported.
* Starting from 2025/03/28, contacts imported via phone number will be labeled as "Unnamed Contact" by default. You may manually update their display names.
* If the channel connection is incomplete, the system cannot identify the contact's UID and will treat them as a phone contact only.
* For brands looking to integrate cross-platform data, we recommend enabling the **Customer Data Hub** to synchronize contact tags and attributes across MAAC and CAAC.

Common Operations

Search for a Specific Contact

You can search contacts by the following fields:

* Contact Name
* LINE UID
* Facebook ID
* Instagram ID
* Email
* Phone Number
* Customer ID

Filter Contacts

Click on "Filter Contacts" and select filters based on:

By Platform

* LINE: Show LINE contacts
* Messenger: Show Facebook contacts
* Instagram: Show Instagram contacts

By Channel

Select a specific connected LINE OA, Facebook Page, or IG Business Account.

By Contact Conditions

* Tags, engagement metrics, join time, last interaction time, source, gender, birthday, phone, email, Customer ID

{% hint style="info" %}
📌 Source Filter Explanation:
{% endhint %}

Source Type	Description
Binding Message	Contact added via MAAC binding link. Common scenarios: - Binding SMS messages - Binding messages generated via MAAC OpenAPI
Notification Message	Contact added after receiving a notification-type message

Bulk Tag Updates

* After applying filters, select multiple contacts and click "Bulk Tag Update" to add or remove tags for all selected contacts.

View & Edit Contact Details

* Click a contact's name to expand the detail panel.
* Edit fields directly and changes will be saved in real-time.
* Switch to the "Customer Data Hub" tab to view synced data from MAAC and other platforms (e.g., CAAC).

Related Article: [MAAC & CAAC Customer Data Integration](https://crescendolab.zendesk.com/hc/en-us/articles/43405131619481)

Import & Export Contacts

For detailed steps, see: [MAAC Contact Import & Export Guide](https://crescendolab.zendesk.com/hc/en-us/articles/4413238667801)

Related articles

* [Tutorials | MAAC x SurveyCake Form](https://crescendolab.zendesk.com/hc/en-us/related/click?data=BAh7CjobZGVzdGluYXRpb25fYXJ0aWNsZV9pZGwrCJkr5rYDBDoYcmVmZXJyZXJfYXJ0aWNsZV9pZGwrCJmIGIkDBDoLbG9jYWxlSSIKZW4tdXMGOgZFVDoIdXJsSSJGL2hjL2VuLXVzL2FydGljbGVzLzQ0MTM5OTk5NTA3NDUtVHV0b3JpYWxzLU1BQUMteC1TdXJ2ZXlDYWtlLUZvcm0GOwhUOglyYW5raQY%3D--1f880d00258724a78052c515944e62345884d05f)
* [Tutorials | New Tag System : Tag Intensity and Timespans](https://crescendolab.zendesk.com/hc/en-us/related/click?data=BAh7CjobZGVzdGluYXRpb25fYXJ0aWNsZV9pZGwrCBk01%2F8FBDoYcmVmZXJyZXJfYXJ0aWNsZV9pZGwrCJmIGIkDBDoLbG9jYWxlSSIKZW4tdXMGOgZFV

DoIdXJsSSJaL2hjL2VuLXVzL2FydGljbGVzLzQ0MjM4MTM2NDEyNDEtVHV0b3JpYWxzLU
5ldy1UYWctU3IzdGVtLVRhZy1JbnRlbnNpdHktYW5kLVRpbWVzcGFucwY7CFQ6CXJhbmtp
Bw%3D%3D--39d28b20e765c82fd6b691508402749c5afa2387)

* [How to share LINE OA platform, LINE Developers, GA(UA) / GA4 access to Crescendo
Lab?](https://crescendolab.zendesk.com/hc/en-
us/related/click?data=BAh7CjobZGVzdGluYXRpb25fYXJ0aWNsZV9pZGwrCJmp1FFgBzoY
cmVmZXJyZXJfYXJ0aWNsZV9pZGwrCJmIGIkDBDoLbG9jYWxlSSIKZW4tdXMGOgzFVDoI
dXJsSSJ1L2hjL2VuLXVzL2FydGljbGVzLzgxMTAyNzExNDYzOTMtSG93LXRvLXNoYXJlLU
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Q3Jlc2NlbmRvLUxhYgY7CFQ6CXJhbmtpCA%3D%3D--
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* [Tutorial | CAAC Conduct Conversation and Contact
Information](https://crescendolab.zendesk.com/hc/en-
us/related/click?data=BAh7CjobZGVzdGluYXRpb25fYXJ0aWNsZV9pZGwrCJn6ysBcBzoYc
mVmZXJyZXJfYXJ0aWNsZV9pZGwrCJmIGIkDBDoLbG9jYWxlSSIKZW4tdXMGOgzFVDoId
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mtpCQ%3D%3D--a01930e878f2067d1830d0bd81a40c9590dc2024)
* [Why Are the Pre-set Auto-reply and Rich Menu Not
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us/related/click?data=BAh7CjobZGVzdGluYXRpb25fYXJ0aWNsZV9pZGwrCJletogDBDoYc
mVmZXJyZXJfYXJ0aWNsZV9pZGwrCJmIGIkDBDoLbG9jYWxlSSIKZW4tdXMGOgzFVDoId
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LXNldC1BdXRvLXJlcGx5LWFuZC1SaWNoLU1lbnUtTm90LVdvcmtpbmcGOwhUOglyYW5r
aQo%3D--bbf7189dae5bf548a2c96fc8961dea9155795262)

Feature Description | Contact Field Explanation and Matching Logic – Crescendo Lab
Help Center

Feature Overview

MAAC allows brands to create and update contacts through various methods. Based on the
selected **Key** value, the system automatically determines whether to add a new contact
or update an existing one. This article explains:

* Supported contact fields and formats
* Matching logic using Key values
* Field behavior during import/update
* Common errors and reasons for update failure

{% hint style="info" %}
Before importing, export existing data to confirm the correct Key is used to avoid creating
duplicate contacts.
{% endhint %}

Matching Logic

Each time you import contact data, you must select a **Key** for identifying existing contacts.

* If a match is found, the system updates the existing contact.
* If no match is found, a new contact is created.

Key	Applicable To	Matching Logic	Notes
`line_uid`	LINE contacts	Matches based on LINE UID	Recommended when using webhook or green badge API
`customer_id`	Custom contacts / API integration	Matches a brand-defined unique ID	Recommended when exporting from CRM
`phone`	Contacts with saved phone numbers	Matches based on phone number	If duplicates exist, the system updates the latest one

Supported Fields Overview

Field Name	Description	Importable	Updatable	Notes
`line_uid`	LINE user UID	✅	✅	Key field for LINE contacts
`phone`	Phone number	✅	✅	Avoid assigning the same number to multiple contacts
`customer_id`	Brand-defined unique ID	✅	✅	Must be unique
`name`	Display name	✅	✅	Will overwrite existing value if provided
`email`	Email address	✅	✅	Will overwrite existing value if provided
`note`	Notes	✅	✅	Will overwrite existing value if provided
`tags`	Contact tags	✅	✅	Tags will be merged, not overwritten

`fb_id` / `ig_id`	Facebook / Instagram UID	✅	✅	Must be obtained via API integration
`external_member_id`	System integration UID	❌	❌	Export-only; not supported for import/update
Custom Fields	Brand-created fields	✅	✅	Field name must exactly match backend configuration

Field Update Behavior & Notes

Behavior	System Handling
Field contains new value	New value will overwrite the original
Field is left blank	Original value is retained
Multiple tags included	Tags will be merged with existing ones
Field name is incorrect	System will skip the field

What is a "Bound Contact"?

In MAAC, a contact with a `customer_id` is considered a **bound contact**.

This means the contact is linked to your internal system (e.g., CRM or membership system) and can be used for personalized integrations and automation.

Use Cases:

* Personalized Rich Menu\
  Show different menus for bound/unbound users (e.g., "Join Member" vs. "Order History")
* Conditional Auto-reply Messages\
  Send special messages to bound users (e.g., VIP offers or birthday wishes)
* System Integration\
  Use `customer_id` in API or webhook payloads to ensure consistent identification

{% hint style="info" %}
If your brand offers a membership program or loyalty rewards, we recommend binding contacts via `customer_id` to enable personalization and advanced automation.
{% endhint %}

FAQ

<details>

<summary>Which field should I use as the Key?</summary>

Choose the Key based on your data source:

* LINE webhook → use **line_uid**

* CRM export → use **customer_id**

* Phone list → use **phone** (ensure no duplicates)

</details>

<details>

<summary>If I use phone as the Key, which contact will be updated?</summary>

The system will update the **most recently created** contact with the same phone number.

We recommend using **line_uid** or **customer_id** to avoid incorrect updates.

</details>

<details>

<summary>Can I use `external_member_id` for import or update?</summary>

No. This field is export-only and cannot be used for import or update operations.

</details>

Learn More

* [Feature Description | MAAC Contact Import, Update and
Export](https://crescendolab.zendesk.com/hc/en-us/articles/4413238667801)

Related articles

* [Feature Description | MAAC Contact Import and
Update](https://crescendolab.zendesk.com/hc/en-us/related/click?data=BAh7CjobZGVzdGluYXRpb25fYXJ0aWNsZV9pZGwrCBnqhYkDBDoY
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* [How to share LINE OA platform, LINE Developers, GA(UA) / GA4 access to Crescendo
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* [Tutorials | CAAC AI - Chatbase Integration](https://crescendolab.zendesk.com/hc/en-

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* [Why can't I login to MAAC? Why does the MAAC function page not display
properly?](https://crescendolab.zendesk.com/hc/en-
us/related/click?data=BAh7CjobZGVzdGluYXRpb25fYXJ0aWNsZV9pZGwrCJnsaTjYBDoYc
mVmZXJyZXJfYXJ0aWNsZV9pZGwrCJnT4u8aLToLbG9jYWxlSSIKZW4tdXMGOgZFVDoId
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aW4tdG8tTUFBQy1XaHktZG9lcy10aGUtTUFBQy1mdW5jdGlvbi1wYWdlLW5vdC1kaXNwb
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Feature Description | MAAC Contact Import and Update – Crescendo Lab Help Center

This article guides you through batch importing or updating contact data via CSV files. As
MAAC upgrades to an omnichannel platform, you can now import contact lists for **Email
(EDM)** and **WhatsApp** in addition to LINE.

Import Fields & Specifications

To ensure data is imported correctly, please prepare your CSV file according to the tables
below. Different channels have specific required fields.

LINE Channel Import

| **Field Name** | **Description** | **Required?** | **Updatable?** | **Note** |

Field Name	Description	Required?		Note
line_uid	LINE User UID	No	❌	Primary identifier for LINE contacts.
phone	Phone Number	No	△	- WhatsApp contact phone numbers cannot be edited. - Other channel contact phone numbers can be updated.
customer_id	Custom Brand ID	No	✅	Recommended to be unique; used for syncing external data.
name	Display Name	No	✅	Will overwrite existing value if populated.
email	Email Address	No	△	- Email contact (EDM) addresses cannot be edited. - Other channel contact emails can be updated.
note	Notes	No	✅	Will overwrite existing value.
tags	Tags	No	✅	Separate with commas. New tags will be merged/added.
Custom Fields	Fields created in settings	No	✅	Column name must match exactly.

Email (EDM) Channel Import

Applicable for importing Email marketing lists. Please note that EDM import has strict **Status** validation mechanisms to protect sender reputation.

Field Name	**Description**	**Required?**	**Note**
email	Email Address	Yes	The primary identifier for EDM contacts.
messaging_ status	Subscription Status	Yes	Value must be one of: "subscribed", "unsubscribed", "hard_bounce", or "spam_report".
display_name	Display Name	No	Max 255 characters.
gender	Gender	No	Value must be: "female", "male", or "unknown".
customer_id	Custom Brand ID	No	Recommended to be unique.
mobile	Phone Number	No	Must follow E.164 format. E.g., for Taiwan: "0912345678" or "+886912345678".

birthday	Birthday	No	Format: YYYY-MM-DD.
tag	Tags	No	Separate with commas; will be merged/added.
consent_source	Consent Source	No	Source of consent (e.g., "Website Footer", "Checkout"). Used for auditing.
consent_at	Consent Time	No	Precise time of consent. Format: YYYY-MM-DD hh:mm:ss. Used for auditing.

WhatsApp Channel Import

Applicable for importing WhatsApp phone lists. This channel **must** include the Status field, otherwise import will fail.

Field Name	**Description**	**Required?**	**Note**
WhatsApp_mobile	WhatsApp Number	Yes	**Required.** Do not change column header. Must follow E.164 format (e.g., +886912345678).
messaging_ status	Subscription Status	Yes	**Required.** Value must be one of: "opted_in", "opted_out", or "not_subscribed".
display_name	Display Name	No	Max 255 characters.
gender	Gender	No	Value must be: "female", "male", or "unknown".
customer_id	Custom Brand ID	No	Recommended to be unique.
email	Email	No	Contact email.
birthday	Birthday	No	Format: YYYY-MM-DD.
tag	Tags	No	Separate with commas; will be merged/added.

Choosing a "Key Value" (Identifier)

Before importing, you must select 1 field as the Key Value. The system uses this to decide whether to "Update" or "Create" a contact:

Key Value	**Description**	**Recommended Scenario**
line_uid	LINE User UID	Contacts created via webhook/LINE.
phone	Phone Number	WhatsApp lists, phone lists, offline data.
email	Email Address	Email (EDM) subscriber lists.
customer_id	Brand Custom ID	CRM systems, API integration users.

⚠️ Note: If multiple contacts in the system share the same phone number, the system will update the contact with the **later creation time**. To avoid incorrect updates, it is recommended to use `line_uid` or `customer_id`.

System Behavior After Import

Condition	**Result**
Key Value matches existing contact	Update contact data (overwrites filled fields only).
Key Value does not match	Create new contact (Unless Key is customer_id, which does not create new).
Incorrect Column Name	Field skipped.
Multiple values in 'tags'	Merged with existing tags; does not overwrite.
Attempt to update Channel Primary Key	System ignores update (line_uid / email / WhatsApp_mobile / SMS phone).

Important Notes on Updates

* Blank fields in CSV do not overwrite existing data.
* Custom field names must match the backend setting exactly.
* If multiple identifier columns are present, the system follows the selected Key Value.
* LINE UID, WA mobile, Email (primary), and Phone (SMS) are non-updatable fields.
* The email address of an Email contact cannot be overwritten.

Channel Import Restrictions

For EDM and WhatsApp channels, strictly adhere to the Status column logic and validation rules.

A. Email (EDM) Import Restrictions

Status Irreversibility

To comply with **international anti-spam laws and protect domain reputation**, MAAC enforces a strict **"Status Irreversibility"** rule:

🚫 You cannot use CSV import to change a contact from "Unsubscribed" or "Hard Bounce" back to "Subscribed".

* If you attempt to change `Unsubscribed` to `Subscribed` in the CSV, the system will **ignore the status update** while updating other fields (e.g., name, phone). This prevents sending to users who have opted out, protecting your brand from being blacklisted.

Auto-Suspension Policy

To maintain sending quality, the system monitors domain performance. Your sending function may be **automatically suspended** if:

* Trigger Conditions (within 24 hours):
  * Hard Bounce: 20 occurrences **AND** bounce rate 5%.
  * Spam Report: 10 occurrences **AND** complaint rate 0.5%.

How to Restore?

* Clean your email list using 3rd-party tools to remove invalid addresses.
* Import the cleaned results to MAAC to update contact status.
* Contact your CSM to apply for reinstatement (requires manual review).

⚠️ Use only consensual, opted-in lists. Do not use purchased or scraped lists.

B. WhatsApp Import Restrictions

Mandatory Fields: Status & Format

To meet Meta's technical specs, WhatsApp import has mandatory rules:

* Status Field is Mandatory — Unlike other channels, the `status` field is **strictly required**.

  Allowed Values: `opted_in`, `not_subscribed`, `opted_out`.

  System Behavior: If `status` is blank, the system will **"Skip"** the row entirely.
* Phone Number Format — Must use **E.164 International Format** (e.g., `+886912345678`). Incorrect formats will result in failure.

Meta Quality & Suspension

* Risk: Sending to `not_subscribed` or `opted_out` users leads to blocks/reports, lowering your **Quality Rating** and sending limits.
* Risk Acceptance: If your list includes non-subscribed users, MAAC will require you to sign a **Risk Acceptance Form** before sending.

Import Steps

{% stepper %}
{% step %}

Download Template

Go to **Contact Management Import / Update Contacts** and download the system provided **CSV Import Template**.

Tip: Export existing contacts first to check column names and ensure Key Values match to avoid duplicates.

{% endstep %}

{% step %}

Upload File

Upload your prepared CSV file. The system will auto-validate format and data.
{% endstep %}

{% step %}

View Results

Once completed, you will receive a notification (bell icon). If there are failures, download the "Import Failure Report" to check for errors (e.g., invalid format, empty status) and correct them.
{% endstep %}
{% endstepper %}

FAQ

<details>

<summary>Q: If the imported phone number exists multiple times in the system, which one is updated?</summary>

A: The system updates the contact with the **later creation time**. To avoid ambiguity, use `line_uid` or `customer_id` as the Key.

</details>

<details>

<summary>Q: Will existing tags be overwritten during import?</summary>

A: No. Imported tags are merged with existing tags.

</details>

<details>

<summary>Q: Why didn't certain fields update?</summary>

A: Possible reasons:

* The field was blank in the CSV.
* Column name does not match backend settings.

* Field is a "Channel Primary Key" and cannot be updated (line_uid, WhatsApp_mobile, email).
* Used `customer_id` as Key, but the ID does not exist in the system (cannot create new).

</details>

<details>

<summary>Q: Can I create and update contacts in the same file?</summary>

A: Yes. The system judges based on the Key Value. However, if using `customer_id` as the Key, it only updates existing contacts and will not create new ones.

</details>

<details>

<summary>Q: Why are contacts merged after import?</summary>

A: MAAC uses **Profile Unification** logic. If any of these fields match an existing contact, they are merged: email, phone, customer_id, line_uid, WhatsApp_mobile, fb_id, ig_id.

</details>

<details>

<summary>Q: Why were some rows skipped during WhatsApp import?</summary>

A: WA import requires two mandatory fields: `WhatsApp_mobile` and `status`. If status is empty, the row is skipped.

</details>

Onboarding Guide | How to Enable Email Channels and Import Contacts – Crescendo Lab Help Center

Phase 1: Email Channel Activation

To enable the Email feature in a Customer Journey, you must complete two stages: Channel Activation and Journey Settings. Email channel activation requires Crescendo Lab Ops assistance (not self-service).

{% stepper %}
{% step %}

Prepare and Submit Activation Request

Complete the application form here: [MAAC Email Channel Activation Request](https://tally.so/r/81Z4El)

Initial setup includes DNS verification and channel configuration. Allow **10 business days** for activation, followed by a **15-day** Email warm-up process.
{% endstep %}

{% step %}

Provide Domain & Sender Information (to your CSM)

Provide the following to your CSM:

* Brand Domain (e.g. brand.com)
* Sender Domain (recommended as a subdomain, e.g. `marketing.brand.com`)\
  \&#xNAN;*The root domain of the Sender Domain must match the Brand Domain.*
* Sender Profile (sender name and email shown to recipients, e.g. Brand News <news@marketing.brand.com>)\
  \&#xNAN;*Under one Brand Domain, multiple Sender Domains and Sender Profiles are supported.*
* Reply-To Address (must be a real receiving email, e.g. <support@brand.com>)
  {% endstep %}

{% step %}

Configure DNS Records (IT collaboration)

Crescendo Lab will provide DNS values (including SPF, DKIM). Ask your IT staff or DNS vendor to add these records to your domain hosting backend to ensure deliverability and domain reputation.
{% endstep %}

{% step %}

Verify and Enable

After DNS settings are added, notify your CSM. Once Crescendo Lab verifies, the Email channel status will display as **Connected** in Admin Center > Channel settings.
{% endstep %}
{% endstepper %}

Email Channel Status

In Admin Center > Email channel list, the system shows one of four states based on sender setting completeness and sending health (past 24 hours):

Channel Status	Status Description	System Behavior
Connected	At least one Sender Profile is verified and Active.	You can set and send Emails in Customer Journeys.
Not Set	No Active Sender Profiles detected.	Emails in Customer Journeys will not be sent.
Suspended	Channel forcibly suspended by Automatic Suspension Policy to protect reputation.	All Email sending is stopped immediately.
Warning	Incomplete sender domain settings or declining sending health.	Usually still allows sending, but a risk warning appears.

👉 Learn more: [Email Channel Status and Common Solutions](#h_01KD10QB6MHQ5BA73H6VYEK9GT)

***

Phase 2: Import Email Channel Contacts

In the Contacts page you can view each contact's Email status to identify who can receive emails or has unsubscribed.

Contact Status Definitions

Status Display	Definition	Can Send
Subscribed	Customer agreed to receive emails; mailbox is normal.	Yes ✅
Unsubscribed	Customer clicked the unsubscribe link.	No ❌
Suppressed	Includes past Hard Bounce, multiple Soft Bounce, Spam Report, Invalid Domain (hygiene invalid). System blocks sending to protect domain reputation.	No ❌

CSV Import Tutorial and Important Rules

{% stepper %}
{% step %}

Start Import

* Go to Audience > Contacts > Import
* Click "Import data manually"
* Select the Email channel to import
* Select key value "Email"
  {% endstep %}

{% step %}

Prepare CSV

* Click "Next"
* Download the dedicated CSV template
* Fill in the Email and messaging_status fields in the CSV template (Required)
  {% endstep %}

{% step %}

Upload

* Click "Import" to upload the CSV file
* After import completes, view results in the notification center (top right) and check the contact list for imported Email contacts

Reminder: Do not attempt to change Unsubscribed users to Subscribed via import; the system will ignore such changes.
{% endstep %}
{% endstepper %}

Important Import Restrictions

To comply with international anti-spam laws and protect domain reputation, MAAC enforces an irreversible status rule:

* You cannot change "Unsubscribed" or "Suppressed" contacts back to "Subscribed" via CSV import.

* If you attempt to change Unsubscribed to Subscribed in the CSV, the system will ignore the status update and only update other fields (e.g., name, phone number).

Automatic Suspension Policy

To maintain sending quality, the system monitors recent sending. If your sending domain meets these conditions within the past 24 hours, the system will automatically suspend sending:

* Hard Bounce: count exceeds 20 AND bounce rate > 5%
* Spam Report: count exceeds 10 AND report rate > 0.5%

How to restore:

1. Use a third-party tool to clean your Email list and exclude invalid addresses.
2. Import the cleaning results into MAAC to update contact statuses.
3. Notify your CSM to apply for restoration; Ops will manually review and restore if appropriate.

⚠️ Email channel functions use shared IPs; one abnormal sender can damage all clients. Use only consented, subscribed lists. Do not use purchased or scraped lists.

***

Common Questions (FAQ)

I. Operation and Settings

<details>

<summary>Q. I have a large Email list but I'm unsure how many are invalid. Will importing and sending directly cause my account to be locked?</summary>

The system performs basic checks during import (e.g., domain MX records), but if sending results in a high Hard Bounce rate after import, the automatic suspension mechanism may be triggered.

Suggested action: Use a third-party Email cleaning tool to filter invalid mailboxes first, or test send to a small, recently active subset to ensure list health.

</details>

<details>

<summary>Q. DNS settings are too complicated for me, and I don't have IT staff. Can I provide my account and password for you to set it up?</summary>

For security reasons, Crescendo Lab cannot accept your DNS hosting account credentials.

Suggested action: Crescendo Lab will provide a complete DNS setting value table. Pass this document to your DNS vendor or IT staff to "copy and paste" and complete the settings.

</details>

<details>

<summary>Q. Why can't I change "Unsubscribed" users back to "Subscribed" when importing CSV?</summary>

This is a security mechanism to comply with anti-spam regulations and protect sending reputation. Forcibly resetting users who opted out may cause high report rates and domain blocking.

</details>

II. Email Channel Status

<details>

<summary>Q: Why does my Email channel show "Not Set" and I can't send Emails in the journey?</summary>

"Not Set" means no valid Active Sender Profiles detected. A usable profile must have Profile Created and Domain Verified (DNS) Successful. Without a valid profile, Email nodes in journeys are blocked.

How to handle:

1. Contact your CSM to confirm sender information submission (Brand Domain, Sender Domain, Sender Email, Sender Name, Reply-to Address).
2. If you received DNS settings, pass them to IT and notify CSM/Ops to perform "Re-check DNS".

</details>

<details>

<summary>Q: Why does my Email channel show "Suspended" and all emails have stopped sending?</summary>

"Suspended" indicates the Automatic Suspension Policy was triggered (within past 24 hours):

* Hard Bounce: >20 emails AND bounce rate >5%
* Spam Report: >10 emails AND report rate >0.5%

How to handle:

1. Clean the list with third-party Email Hygiene Tools.
2. Import the cleaned invalid list into MAAC and update status to "Suppressed".
3. Contact your CSM/Ops to apply for restoration; Ops will review and manually restore to "Connected" if cleared.

</details>

<details>

<summary>Q: What does it mean when the Email channel shows "Warning"? Can I still send emails?</summary>

"Warning" indicates incomplete domain verification or declining sending health. Sending is usually still allowed but risky.

Common reasons:

* Missing or partial domain verification (e.g., SPF passed, DKIM failed)
* Health decline in past 24 hours:
  * Hard Bounce: >10 emails AND bounce rate >2%
  * Spam Report: >5 emails AND report rate >0.3%

How to handle:

* If verification issue: contact IT to check SPF/DKIM DNS records.
* If health issue:
  * Consider suspending current high-risk campaigns.
  * Review recent lists and content quality.
  * Consider list cleaning to remove low-engagement or invalid contacts.

</details>

<details>

<summary>Q: Why is the Email channel settings page "Read-only" and uneditable?</summary>

Email channel uses a "Managed Service" mode. DNS verification and third-party integration are complex and must be configured/verified by the Crescendo Lab Ops team. The Admin Center page is view-only.

If you need modifications (add/modify sender info, add sender domain, request DNS re-verification), contact your Customer Success Manager (CSM).

</details>

III. Email Function Billing

<details>

<summary>Q. Why can't I use the "Send Email" node in the journey, and the button shows Upgrade?</summary>

Your Email channel has not completed activation. Email activation requires domain verification (DNS) and sender settings, and cannot be self-enabled. Contact your CSM to apply for activation.

</details>

<details>

<summary>Q. How is the Email sending function charged? Is there a free quota?</summary>

Charging model: "Plan Quota + Overage Pay-per-use"

* Plan Quota: monthly free sending quota per subscription plan.
* Overage Billing: excess emails beyond plan quota are charged per email.

For detailed quotas and pricing, consult your CSM or the quotation.

</details>

<details>

<summary>Q. How are overage fees deducted? Is a separate top-up required?</summary>

Overage fees are deducted from the shared MAAC Points Pool (CL Points Pool) used by Email and SMS/MMS. No separate account is required. If points are insufficient, top-up per existing process.

</details>

<details>

<summary>Q. If email delivery fails (e.g., recipient address does not exist), will I still be charged?</summary>

The system has a "Hard Bounce Credit-back" mechanism. Points are deducted at send time, but if an email is determined to be a Hard Bounce within 24 hours, the fee for that email will be automatically refunded to your account.

</details>

***

When channel activation and contact import are complete, you can use Customer Journey to send emails. For Email editor operations and journey node settings, see: [Feature Guide | Email Omnichannel Journeys & Editor Tutorial](https://crescendolab.zendesk.com/hc/en-us/articles/53567465248537)

Related articles

* Feature Guide | Email Omnichannel Journeys & Editor Tutorial: <https://crescendolab.zendesk.com/hc/en-us/articles/53567465248537>

* Tutorials | Customer Journey ✨ New ✨: <https://crescendolab.zendesk.com/hc/en-

us/related/click?data=BAh7CjobZGVzdGluYXRpb25fYXJ0aWNsZV9pZGwrCJkQ8ocDBDoY

cmVmZXJyZXJfYXJ0aWNsZV9pZGwrCBkOafO4MDoLbG9jYWxlSSIKZW4tdXMGOgZFVD

oIdXJsSSJEL2hjL2VuLXVzL2FydGljbGVzLzQ0MTMyMTIyMDExMTMtVHV0b3JpYWxzLUN

1c3RvbWVyLUpvdXJuZXktTmV3BjsIVDoJcmFua2kH--

880c82a842d68bb4549cfddc0615685de88cb5a4>

* Feature Introduction | WhatsApp Broadcast: Overview & Setup Guide: <https://crescendolab.zendesk.com/hc/en-us/related/click?data=BAh7CjobZGVzdGluYXRpb25fYXJ0aWNsZV9pZGwrCBnkY4fRMDoY cmVmZXJyZXJfYXJ0aWNsZV9pZGwrCBkOafO4MDoLbG9jYWxlSSIKZW4tdXMGOgZFVD oIdXJsSSJjL2hjL2VuLXVzL2FydGljbGVzLzUzNjc2NDc3Nzg4NzI5LUZlYXR1cmUtSW50cm 9kdWN0aW9uLVdoYXRzQXBwLUJyb2FkY2FzdC1PdmVydmlldy1TZXR1cC1HdWlkZQY7C FQ6CXJhbmtpCA%3D%3D--9a2b164a77e0693ec10ed7c776f13f3aec1b96eb>

* Tutorials | How to Upload Product Feed Data?: <https://crescendolab.zendesk.com/hc/en-us/related/click?data=BAh7CjobZGVzdGluYXRpb25fYXJ0aWNsZV9pZGwrCJkP8pFoMDoY cmVmZXJyZXJfYXJ0aWNsZV9pZGwrCBkOafO4MDoLbG9jYWxlSSIKZW4tdXMGOgZFVD oIdXJsSSJQL2hjL2VuLXVzL2FydGljbGVzLzUzMjI1NjgzMjkyMDU3LVR1dG9yaWFscy1Ib3c tdG8tVXBsb2FkLVByb2R1Y3QtRmVlZC1EYXRhBjsIVDoJcmFua2kJ--5afc9d4d7b28f24019d73e38049e3d644639c5a3>

* Tutorial | SDK Web Behavior Tracking Tool: <https://crescendolab.zendesk.com/hc/en-us/related/click?data=BAh7CjobZGVzdGluYXRpb25fYXJ0aWNsZV9pZGwrCJk0ii%2BuJTo Ycm VmZXJyZXJfYXJ0aWNsZV9pZGwrCBkOafO4MDoLbG9jYWxlSSIKZW4tdXMGOgZFV DoIdXJsSSJOL2hjL2VuLXVzL2FydGljbGVzLzQxNDMwMDUyMTIzODAxLVR1dG9yaWFsL VNESy1XZWItQmVoYXZpb3ItVHJhY2tpbmctVG9vbAY7CFQ6CXJhbmtpCg%3D%3D--ef6f5f7ce2e3bd16ea792bb037904835684eb5d2>

Product Specifications

PRD — Contact Profile Unification (MAAC)

Unify customer contact profiles in MAAC across LINE and SMS using CDH Customer 360. Covers identity matching, profile merging logic, segment filters, tags, phone handling, migration, and audit logs.

Contact Profile Unification in MAAC (LINE + SMS)

Unify customer contact profiles across **LINE** and **SMS** inside **MAAC**, powered by **CDH Customer 360**.

This work enables:

* **Identity resolution / identity stitching** across channels (LINE UID, phone, customer ID).
* **Deduplicated messaging** (avoid sending LINE + SMS twice to the same person).
* **Omnichannel segmentation** and **personalized customer journeys** with a single unified profile.

Related specs (recommended reading)

* Cross-product PRD: [PRD Profile unification (CAAC & CDH)](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/audience/contacts/product-specifications/prd-profile-unification-caac-and-cdh)
* System design: [Profile unification](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/audience/contacts/system-design/profile-unification)
* Contact matching logic (import/update): [Feature Description | Contact Field Explanation and Matching Logic – Crescendo Lab Help Center](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/audience/contacts/feature-overview/feature-description-contact-field-explanation-and-matching-logic-crescendo-lab-help-center)

Key terms used in this PRD

* **Unified contact profile**: one person's Customer 360 profile.
* **Channel entity**: channel-level identity (e.g., LINE user, SMS/phone).
* **Unify keys**: identifiers used for matching (e.g., `line_uid`, phone, `customer_id`, `connect_id`).
* **Profile merge / unification logic**: rules that decide when entities become one profile.
* **Syncing / coalesce rules**: field-level and tag-level merge behavior after unification.

***

For cross-product profile unification across **CAAC + CDH**, see:

* [PRD Profile unification (CAAC & CDH)](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/audience/contacts/product-specifications/prd-profile-unification-caac-and-cdh)

* (Legacy Google Doc)
<https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-JSoEJ1bZ6TsM/edit>

This PRD will only focus on the contact profile unification in MAAC - mapping profiles across channels in MAAC.

PM owner [Lydia Hou](mailto:lydia.hou@cresclab.com)**Eng owner** [Jalex Chang](mailto:jalex.chang@cresclab.com)**PD owner** [Johny Hsieh](mailto:johny.hsieh@cresclab.com)	**💬Slack channel****⏱️Asana****📁Notion**

Version history

Version	Date	Description	Editor
Ver. 1	2024-04-16	Draft done	[Lydia Hou](mailto:lydia.hou@cresclab.com)
Ver. 2	2024-06-05	Adjusted whole PRD to fit [new MAAC process](https://docs.google.com/document/d/1G3-92hP_-e4T5jVDeF3PsxW4kolFBQE-lrBd60NYEGI/edit#bookmark=id.jhi0qxfy138b)	[Lydia Hou](mailto:lydia.hou@cresclab.com)

Release notes

Contact profile unification provides a 360-degree understanding of your customer across communication channels (e.g. LINE, SMS). Help brands to build continuous customer journeys and engage customers with full context and personalization.

![Customer 360: unified contact profile across LINE and SMS in MAAC](https://content.gitbook.com/content/GBP3mPdNeU7kBvG5sba7/blobs/0FuHm9noTzVoFRetnvmf/Unknown%20image)

Product Goal

* Our ultimate goal in MAAC is to build an omnichannel MA, which could provide a seamless marketing engagement with contacts across channels, products, and 3rd party tools.
* To achieve the product goal, contact profile unification is a foundation for **CDH segment** for both **broadcast** and **journey.**
* These features emphasize personalization, which will be** a highlight feature in Next Level MAAC**.

Overall scope

What needs to be considered

To have a unified contact profile (stored in CDH), we need to consider below:

1. Types of unification: Determination of data mapping scope, 5 types
2. no merge
3. CAAC has unified profile, not synced to MAAC \[UI: [CAAC

UI](https://www.figma.com/design/k0XwP83RAV16nVdyFx7crb/Omnichannel-inbox?node-

id=6781-36205\&t=SnUy9bRr5jTJRcJi-4)] → supported in Q2

4. **MAAC has unified profile, not synced to CAAC \[UI: MAAC UI] → M TBD → M1

 (**[**Thread**](https://chatbotgang.slack.com/archives/C0774K3DEQP/p17186023899918

49)**) ** 1. Need migration UI/flow → [Johny Hsieh](mailto:johny.hsieh@cresclab.com)to

design → BE to scope
5. b+c, separately
6. CL has unified profile (across CAAC and MAAC) \[UI: [CDH

module](https://www.figma.com/design/k0XwP83RAV16nVdyFx7crb/Omnichannel-

inbox?node-id=6781-34792\&t=SnUy9bRr5jTJRcJi-4)] \[default onboarding] → M1 BE
7. Syncing logic
8. **SMS+LINE** 1. Contact/Profile → M1 QA [PRD - Profile unification (CAAC &

CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-

JSoEJ1bZ6TsM/edit) 2. Field → M1 QA [PRD - Profile unification (CAAC &

CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-

JSoEJ1bZ6TsM/edit) 3. Tag→ M1 BE 4. Phone → M1 BE

9. MAAC+CAAC 1. Contact/Profile → M2 [PRD - Profile unification (CAAC &

CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-

JSoEJ1bZ6TsM/edit) 2. Field → M2 [PRD - Profile unification (CAAC &

CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-

JSoEJ1bZ6TsM/edit) 3. Tag→ M2 4. Phone → M2
10. Contact import logic
11. **Import via UI →**M1

12. Import via API → [PRD - Profile

API](https://docs.google.com/document/d/1JNTwiI0hXYqHeHEo3rZaWE7m4m9rCcO6LOk-

TphACL4/edit)
13. Migration/ admin changes

14. **SMS+LINE** 1. New client flow → default on [PRD - Profile unification (CAAC & CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-JSoEJ1bZ6TsM/edit) → M1 QA 2. Migration flow → progress status [PRD - Profile unification (CAAC & CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-JSoEJ1bZ6TsM/edit) → M1 QA 3. Ways to change profile merging logic for future profiles → M1 QA 4. Ways to undo merged profiles → by day by brand snapshot restore 工單 \[CS] → M1 QA

15. MAAC+CAAC 1. New client flow → default on [PRD - Profile unification (CAAC & CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-JSoEJ1bZ6TsM/edit) → M2 QA 2. Migration flow → progress status [PRD - Profile unification (CAAC & CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-JSoEJ1bZ6TsM/edit) → M2 QA 3. Ways to change profile merging logic for future profiles → M2 QA 4. Ways to undo merged profiles → by day by brand snapshot restore 工單 \[CS] → M2 QA

16. Behavior for existing features

17. Display profile fields 1. Display in current MAAC fields (including tag design) → M2 2. Remove CDH tag tab → M2 3. Display all [CL customer](https://docs.google.com/spreadsheets/d/15yRH-nOc0z4ikZpJoLDD8x9AuPWQNWmqfzcDSFvZtkg/edit#gid=937614967) columns in MAAC → M TBD

18. Search for contact by profile fields (include tag) → covered by CQS, desired → M TBD

19. Apply in segments → use MAAC for now, future to read CDH segment 1. Remove CDH filter → M2 2. Add LINE UID filter in segment → M1 FE 3. Add tag created source on UI in segment & tag management →M2 4. Add Region, City, age, birthday, gender, company, account manager, member_levelfilter in segment → M TBD

20. Trigger and action with CDH profile (journey and richmenu) 1. Using tag for trigger journey and richmenu → M2 QA 2. Add tag created source on UI in journey and richmenu → M2

21. Visualization for dashboard and reports → M TBD

22. Data 1. **Import & Export via UI →**

1. Import: M1 keep using separate contact import for LINE and SMS → M TBD? or M1?

2. Export: M1 keep using segment as workaround → M TBD? or M1? 2. Import & Export via API\&BQ → [PRD - Profile API](https://docs.google.com/document/d/1JNTwiI0hXYqHeHEo3rZaWE7m4m9rCcO6LOk-TphACL4/edit) 3. Import & Export via Native integration → M TBD

23. Data exports (webhook event) 1. CDH tag add/remove webhook → M2 BE

24. Edge cases

25. Error handling when we couldn't unify some profiles 1. support manually unify with connect_id [PRD - Profile unification (CAAC & CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-JSoEJ1bZ6TsM/edit#heading=h.7z5imn1sorpi) M1 QA

26. When it's unified wrongly, what can/should users do? 1. supported by audit log with [metabase](https://play.cresclab.com/dashboard/128-cdh-auditlog?date_range=2024-04-23~2024-05-03\&maacbotid=1\&maaclineuid=U463c4fc03e3b9493c3fe8b1b37b4343f\&caac_channelid=3\&caac_memberuid=\&known_member_id=) \[CS] → M1

User story

1. \[M1] As a marketer, I want to deliver regular marketing campaign information but prevent repeat msgs across different channels to the same contact, to ensure my budget doesn't waste on repeated information and prevent increasing blocking rate due to too bother contacts.

2. Use case breakdown ([Reference for details](#_rijja85hhteb)) 1. Case 1: As a marketer, I want to reach entities, who have blocked my LINE OA, through SMS to increase the active LINE friends. 2. Case 2: As a marketer, I want to reach entities, who haven't been reached through a LINE campaign, through SMS, to increase the LINE engagement (wake up sleeping friends) 3. Case 3: As a marketer, I want to reach entities, who receive a LINE message but don't open it yet, through SMS, to ensure the important message deliver to the consumer.

3. capability 1. Send SMS but exclude the segment that already sends LINE msg 2. Send LINE but exclude the segment that already sends SMS msg

4. \[M2] As a marketer, I want to broadcast but prevent wasting my budget on the black contact list 黑名單 from service/sales agents in CAAC.

5. capability 1. CDH tag filter in segment for broadcast

6. \[M2] As a marketer, when the contact join LINE OA from specific store, I want to auto send CAAC store specific prize to encourage the contact to shop in store again.

7. capability 1. CDH tag trigger journey

8. \[M1] As a marketer, I want to map the phone number from CRM (import via API/UI) with MAAC LINE friends with phone number to get a more complete profile to better segmentation, so that I could enlarge marketing performance (increase click rate with a more personalized message) with both SMS and LINE.

9. capability 1. import phone via API/UI and mapping with LINE contact

10. \[M1] As a PM in CL, I want to map the phone and LINE contact and use the contact tier pricing (instead of LINE contact tier), so that I could better reflect the contact tier pricing and increase the TTL revenue.

11. capability 1. map the phone and line entity to 1 contact

12. \[M2] As a marketer, I want to easily find the tags created from CAAC/API in the **segment**, so that I could choose correctly when I am creating a segment for service/sales purposes or a segment for CRM/CDP purpose(via API).

13. For example 1. \[CAAC] after-service/sales care, \[API] VIP in EC

14. capability 1. show tag-created source in segment

15. \[M2] As a marketer, I want to easily identify the tag-created source in the **tag management**, so that I won't wrongly delete the tag which is service/sales purposed or 3rd-party tools generated via API.

16. capability 1. show tag-created source in tag management

17. \[M2] As a CS, I don't want to let marketers see a repeated tag tab after profile unification, which might created a great confusion.

18. capability 1. contact profile with 1 tag tab

19. \[M TBD] As a marketer, I want to add/remove tag batch

20. capability 1. search and filter by tag on contact page

21. Gordon's random notes 1. contacts page: search and filter by tag -> export for further

analysis \[segment 可解] 2. contacts page: search and filter by tag -> update tag to do data

clean up \[]

22. \[M TBD] As a marketer, I want to detect someone blocked LINE OA and wish there's a way to win them back.

23. block OA trigger + send SMS in journey + SMS delivered

24. \[M TBD] As a marketer, I want to send the msgs with auto channel fallback during Black Friday, Strawberry season to maximize engagement

25. … LINE unread after X period → send SMS

26. … LINE read but no conversion after X period → send SMS

27. \[M TBD] As a marketer, I want to send the msgs with manually choosing channel to minimize cost / maximize engagement, but at the same time ensure the information deliver to contacts.

28. contact has both SMS anl → send via that channel

29. \[M TBD] As a marketer, I want to show different richmenu to different member level contacts, to let VIP experience a sense of honor, and common contact have incentives to level up.

30. memd LINE → select 1 to send by cost (LINE) or engagement (SMS)

31. contact only has 1 channeber level to trigger richmenu change

32. \[M TBD] As a marketing manager, I want to see the performance of profile mapping rate across MAAC x CAAC, so that I could better plan for marketing strategy on channels (1 contact have LINE/FB/IG/SMS channel reachable or not)
33. Admin center to show mapping rate
34. \[M TBD] As a marketing manager, I want to know the performance of marketing campaign more precisely (not 1 contact be counted repeatedly in different channels)
35. after profile unification: we could identify same Lydia
36. timeline 1. before: line UID + 3p customer id 2. now: phone # vs line uid + 3p customer id 3. future: + FB, + IG, (+ WhatsApp), (+web behaviour)

Milestone 1 LINExSMS profile unification

User story

* 1, 4, 5

Goal

* Contact profile unification across phone and LINE contact to increase the contact base of sending both LINE and SMS msg, which could be **an upselling point of SMS to existing MAAC clients**.

Background

* After [PRD - Profile unification (CAAC & CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-JSoEJ1bZ6TsM/edit), we already have the structure of contact profile unification and we need to pick up the cross-channel level within MAAC (LINExSMS) to enlarge the value within MAAC.

Success metric

* Adoption
  * ## of unique organizations enabled contact profile unification rule setting on MAAC
* Usage (with benchmark before & after usage growth)
  * ## of segment using LINE_uid and LINE following status filter

Milestone 2 MAAC x CAAC profile unification

User story

* 2, 3, 6, 7, 8

Goal

* Contact profile unification across MAAC and CAAC to leverage cross-product to empower the bundle use case, which could be **a selling point of the bundle to existing MAAC clients/new CAAC clients**.

Background

* After [PRD - Profile unification (CAAC & CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-JSoEJ1bZ6TsM/edit), we already have the structure of contact profile unification and we need to apply it to MAAC to complete the cross-product level across MAAC and CAAC to enlarge the value of bundle.

Success metric

* Adoption
  * ## of unique organizations enabled contact profile unification rule setting on admin center
* Usage (with benchmark before & after usage growth)
  * ## of CDH tags using for journey, richmenu, segment

Feature spec

1c. MAAC has a unified profile, not synced to CAAC

\[UI: MAAC UI 待補]

* We decided to have a separate setting in MAAC to set up the profile unification rule in MAAC.
* This setting is for the unification between LINE and Phone contact within MAAC

1e. Types of unification: CL has a unified profile (across CAAC and MAAC) \[default onboarding]

* Contact profile unification logic followed:
  * [PRD - Profile unification (CAAC & CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-JSoEJ1bZ6TsM/edit#heading=h.d1tylm7bclh0) feature spec B) Contact profile unification logic
  * [CL Customer 360](https://docs.google.com/spreadsheets/d/15yRH-nOc0z4ikZpJoLDD8x9AuPWQNWmqfzcDSFvZtkg/edit#gid=389794410)Unification logic tab
* We decided (aligned w/PM and eng) to apply 全域設定 of CDH to MAAC. And to

encourage clients to complete the setting, we have the redirect behavior as below form.

| The button in MAAC appstore

| If the client haven't activate CDH, then the button in MAAC appstore will redirect users to CDH setting.
| |
| If the client already activate CDH, then the button in MAAC appstore will redirect users to [CDH Channel unification rule setting](https://platformstaging.cresclab.com/applications/cdh)
| |

2ai. Syncing logic: Contact/Profile

As 1e. mentioned, the contact profile unification logic follows:

* [PRD - Profile unification (CAAC & CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-JSoEJ1bZ6TsM/edit#heading=h.d1tylm7bclh0) feature spec B) Contact profile unification logic

2aii. Syncing logic: Field

As 1e. mentioned, the field unification logic follows:

* [CL Customer 360](https://docs.google.com/spreadsheets/d/15yRH-nOc0z4ikZpJoLDD8x9AuPWQNWmqfzcDSFvZtkg/edit#gid=389794410) Unification logic tab

2aiii. Syncing logic: Tag

As 1e. mentioned, the field unification logic follows:

* [CL Customer 360](https://docs.google.com/spreadsheets/d/15yRH-nOc0z4ikZpJoLDD8x9AuPWQNWmqfzcDSFvZtkg/edit#gid=389794410) Unification logic tab

2aiv. Syncing logic: Phone

* Context:
  * Before phone handling, we directly sync phone in the "display_phone" field.
  * However, after we defined [CL customer 360](https://docs.google.com/spreadsheets/d/15yRH-nOc0z4ikZpJoLDD8x9AuPWQNWmqfzcDSFvZtkg/edit#gid=1977650793) and we had SMS as a new channel, we need to consider both "original_phone" & "display_phone" field.
* Summary:
  * Overall create member with both original & display phone, update rule have some exceptions, and follow below rule:
    * If the system can recognize that the phone has been updated from LINE, update only the LINE original phone and follow the original LINE phone process.

* If the display_phone does not exist, then update the display_phone, e.g., LIFF/PNP binding, SMS bindlink (with PNP).
  * Update contact API, or agent Manual update only update display_phone
* Details pls refer to [notion](https://www.notion.so/cresclab/Unification-of-MAAC-phone-field-b05de72954a940f28fc9c4c40e521419?pvs=4#17989c8da7814896bfbce217684641b3) , Tech ref.: [Phone handling scoping](https://app.asana.com/0/1206764649948244/1207218464794586/f)

3a. Contact import logic: Import via UI

* Since the import key via UI are phone, LINE_uid, Customer_id, and phone merging will impact on different merging logic, so we separate as below:
  * import key is phone: If the same display_phone cannot be found, then create a new contact.
  * import key isn't phone: If the same contact can be identified, then update the display_phone.
* Details pls refer to [notion](https://www.notion.so/cresclab/Unification-of-MAAC-phone-field-b05de72954a940f28fc9c4c40e521419?pvs=4#17989c8da7814896bfbce217684641b3) , Tech ref.: [Phone handling scoping](https://app.asana.com/0/1206764649948244/1207218464794586/f)

4ai. Migration/ admin changes: New client flow

* Same as [**PRD - Profile unification (CAAC & CDH)**](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-JSoEJ1bZ6TsM/edit)

4aii.Migration/ admin changes: progress status

* Same as [**PRD - Profile unification (CAAC & CDH)**](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-JSoEJ1bZ6TsM/edit)

4aiii. Migration/ admin changes: Ways to change profile merging logic for future profiles

* Same as 1c. Clients could directly change the profile merging logic in MAAC, after setting,

the new profile merging logic will follow new rule. \[UI: MAAC UI 待補]

* Same as 1e. Clients could directly change the profile merging logic in admin center, after setting, the new profile merging logic will follow new rule.

| [CDH Channel unification rule setting](https://platformstaging.cresclab.com/applications/cdh) in admin center | |

| -- | ----------
-- |

4aiv. Migration/ admin changes: Ways to undo merged profiles

* Already have the snapshot for profile, CS could create 工單 ticket for restore the profile to a
certain timestamp.
* Follow the same rule, ensure MAAC profile unification also have the snapshot.

5c. Behavior for existing features: Apply in segments → use MAAC for now, future to read
CDH segment

* Add "LINE Contacts status" as a new filtering condition
  * There will be 2 filters need to be added:
    1. Filter - LINE status:
    2. is following
    3. is not following
    4. Filter - LINE_uid have data or not:
    5. all LINE contact （LINE_uid have data or not）
    6. follow current all phone contact filter design
  * The Info Box with the content "Time interval is not valid for this filter" is needed.

| Add "LINE Contacts status" as a new filtering condition (After)

[Design→](https://www.figma.com/design/9Aai2ZaP9iQGo62vGl9qAR/MAAC_Segment?nod
e-id=1686-38552\&t=QiQBwusGFRZZegzr-11) |
| --
-- |
| ![](https://content.gitbook.com/content/GBP3mPdNeU7kBvG5sba7/blobs/sEDLpShK3htUyc
HGezCz/Unknown%20image) |
| Detail settings for "LINE Contacts Status" filter (After)

[Design→](https://www.figma.com/design/9Aai2ZaP9iQGo62vGl9qAR/MAAC_Segment?nod
e-id=1686-39282\&t=QiQBwusGFRZZegzr-11) |
| ![](https://content.gitbook.com/content/GBP3mPdNeU7kBvG5sba7/blobs/yCXOt2LGRViYS
phBgVu7/Unknown%20image) |

6b. Edge cases: When it's unified wrongly, what can/should users do?

* Already supported by audit log with [metabase](https://play.cresclab.com/dashboard/128-
cdh-auditlog?date_range=2024-04-23~2024-05-
03\&maacbotid=1\&maaclineuid=U463c4fc03e3b9493c3fe8b1b37b4343f\&caac_channelid=
3\&caac_memberuid=\&known_member_id=)

* Follow the same rule, ensure MAAC profile unification also have the audit log with [metabase](https://play.cresclab.com/dashboard/128-cdh-auditlog?date_range=2024-04-23~2024-05-03\&maacbotid=1\&maaclineuid=U463c4fc03e3b9493c3fe8b1b37b4343f\&caac_channelid=3\&caac_memberuid=\&known_member_id=)

2biii. Syncing logic: Tag
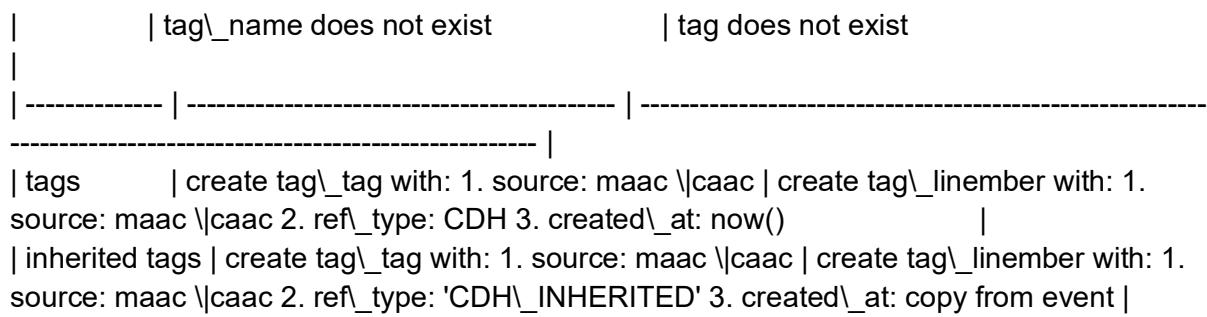
* Since tag will have many actions in MAAC, so we separate the tag into inherited tag and tag to better deal with merging:
* ***inherited***** tag**: *tags created during unifying profiles in CDH. They are redundant and exist for UX-consistent purposes.*
* ***tag**: the normal tags sent from CDH to applications.*
* Tech ref.: [Tag handling scoping](https://app.asana.com/0/1206764649948244/1207218467273303/f)

	tag_name does not exist	tag does not exist
tags	create tag_tag with: 1. source: maac |caac	create tag_linember with: 1. source: maac |caac 2. ref_type: CDH 3. created_at: now()
inherited tags	create tag_tag with: 1. source: maac |caac	create tag_linember with: 1. source: maac |caac 2. ref_type: 'CDH_INHERITED' 3. created_at: copy from event
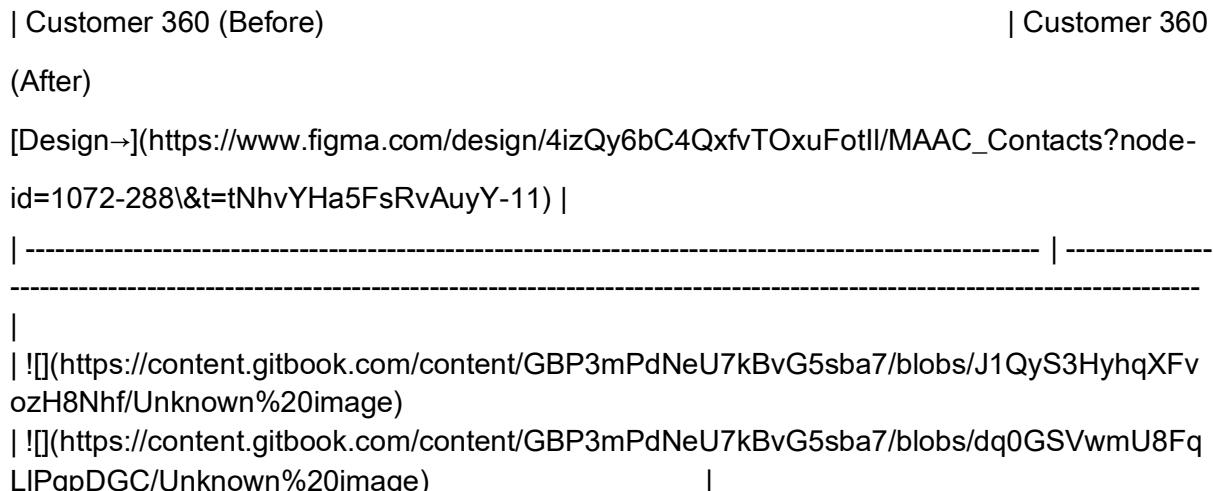
5a. Behavior for existing features: Display profile fields (include tag)

* With contact profile unification:
  * In MAAC, we decided to cancel **CDH tag in profile and segment** to decrease the confusion
  * Profile

Customer 360 (Before)	Customer 360 (After) [Design→](https://www.figma.com/design/4izQy6bC4QxfvTOxuFotll/MAAC_Contacts?node-id=1072-288\&t=tNhvYHa5FsRvAuyY-11)
	

* After contact profile unification:

* CAAC tag could trigger journey, richmenu, and also be used in segment on MAAC, which could help bundle synergy across MAAC and CAAC.

5c. Behavior for existing features: Apply in segments → use MAAC for now, future to read CDH segment

* Mask CDH tag filter in Segment ([thread](https://chatbotgang.slack.com/archives/C04EDDSEV08/p1718277440001489))

Select a way to create segment (Before)	Select a way to create segment (After) [Design→](https://www.figma.com/design/9Aai2ZaP9iQGo62vGl9qAR/MAAC_Segment?node-id=1649-30555\&t=QiQBwusGFRZZegzr-11)
	

* Show the tag-created source (MAAC, CAAC, API) on **Tag Manager** list, to help clients easily identify the tag.
  * context: After learned user scenarios of 典華, agent will manually tagging on CAAC, and marketer will use CDH tag segment for using CAAC created tags. It's important for marketers to quickly identify the tag created source on MAAC UI ([thread](https://chatbotgang.slack.com/archives/C04EDDSEV08/p1718277440001489))

Add a "Source" column in the Tag Management list (After) [Design→](https://www.figma.com/design/cmBetlG0lD5NgzjRlGPUxN/MAAC_Tag-Manager?node-id=420-4297\&t=G6OQ7rnuYqpXJov0-11)

* Show the tag-created source (MAAC, CAAC, API) **Segment** settings, to help clients easily identify the tag.

| Add a "Source" column in the Tag Management list (After)
[Design→](https://www.figma.com/design/9Aai2ZaP9iQGo62vGl9qAR/MAAC_Segment?node-id=1686-28560\&t=QiQBwusGFRZZegzr-11) |
| --- |
| |

5d. Behavior for existing features: Trigger and action with CDH profile (Customer Journey and Richmenu)

* Using CDH tag for trigger Customer Journey → this could be done after

[2c](#_djj2v756e3n2)

| Add {Tag Source} and "Tag filtering feature" in the Tag dropdown menu for Customer

Journey settings (After)

[Design→](https://www.figma.com/design/ASd9RNCXm5fRW4YV0tloZK/MAAC_Customer-

Journey_Handoff?node-id=5546-465\&t=2wnxgmI6fJUsh1nZ-11) |
| --- |
|
|

* Using CDH tag for trigger Richmenu → this could be done after [2c](#_djj2v756e3n2)

| Add {Tag Source} and "Tag filtering feature" in the Tag dropdown menu for Richmenu

settings (After)

[Design→](https://www.figma.com/design/WV506pJ8jVITZCOKID2YBC/MAAC_Richmenu-

personalization?node-id=2350-32587\&t=rRSIHH4NAKrSNbBA-11) |
| --- |
|
|

5g. Behavior for existing features: Data exports (webhook event)

* Using CDH tag for webhook event → this could be done after [2c](#_djj2v756e3n2)

	CDH tag add webhook ([apidoc](https://doc.user360.cresclab.com/cdh.html#tag/Webhook/operation/contact.tag.add))	CDH tag remove webhook ([apidoc](https://doc.user360.cresclab.com/cdh.html#tag/Webhook/operation/contact.tag.remove))
tag	o source: maac	o source: maac
inherited tag	x	x

Release plan

Pricing plan

* MAAC x CAAC: no add-on pricing
* Multiple organizations: as [Crescendo Lab - New Pricing Master Sheet (2024)](https://docs.google.com/spreadsheets/d/1L0Y_gH4SSIo5ZtXSQnbgP9s5R9q5ytE9bpRZ_inP9iw/edit#gid=9243120\&range=A1)

Release region

Please check the gray out feature list ([Link])(https://www.notion.so/cresclab/Product-Availability-e9e275930be946c2b471077b02f7556e)

- TW	- TH	- JP

GTM plan

How do users adopt

* self-serve
  * Admin center for setting ([1e.](#_nveqdnoth54s))

How do users troubleshoot

* raise to CS/enable & ops \[insert steps and the info provided to troubleshoot (eg metabase)
  * [metabase](https://play.cresclab.com/dashboard/128-cdh-auditlog?date_range=2024-04-23~2024-05-03\&maacbotid=1\&maaclineuid=U463c4fc03e3b9493c3fe8b1b37b4343f\&caac_channelid=3\&caac_memberuid=\&known_member_id=)

###

Development Documents

Planning docs

* [PRD - Profile unification (CAAC & CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-JSoEJ1bZ6TsM/edit#heading=h.7z5imn1sorpi)

Design docs

* [CAAC_Profile unification](https://www.figma.com/design/k0XwP83RAV16nVdyFx7crb/Omnichannel-inbox?node-id=4653-25760\&t=TGlZEvCDPJsl0emN-0)
* [MAAC_Customer 360](https://www.figma.com/design/4izQy6bC4QxfvTOxuFotIl/MAAC_Customer-360-and-Segment_Handoff-\(CDH-Partial\)?node-id=1070-37617\&t=VC1DPXZ4b7sVRbgM-0)
* [MAAC_segment](https://www.figma.com/design/9Aai2ZaP9iQGo62vGl9qAR/MAAC_Segment?node-id=1649-30555\&t=mT6GogLpJrrAu0sg-11)

Technical docs

* [Tag handling scoping](https://app.asana.com/0/1206764649948244/1207218467273303/f)
* [Phone handling scoping](https://app.asana.com/0/1206764649948244/1207218464794586/f)

QA docs

* [Test Case - Profile unification (MAAC)_240612](https://docs.google.com/spreadsheets/d/19878BU_XqFtlAP_1Ro0WFiBroyiJ_w3HXQDFSGpLQZE/edit#gid=502134957)

###

Discussion and open questions

Gordon's playground

Problem alignment

Our clients collect their customer data (contact profile) from MAAC, CAAC, and 3rd party integrations. Currently Lydia from MAAC, Lydia from CAAC, Lydia's phone number, Lydia from Facebook, and Lydia from Salesforce are treated as different contacts in both MAAC and CAAC. They should be the same Lydia profile. When data of the same "Lydia" is scattered, it makes it hard for precision marketing, or nor allowing CAAC agents to optimize interaction with this contact's full engagement history.

What needs to be considered

In order to have a unified contact profile (stored in CDH), we need to consider 4 things

1. Types of unification: Determination of data mapping scope, 5 types
2. no merge
3. CAAC has unified profile \[UI: CAAC UI]
4. MAAC has unified profile \[UI: MAAC UI] → Lydia says don't support, Gordon says need

discussion

5. b+c, separately
6. CL has unified profile (across CAAC and MAAC) \[UI: CDH module] \[default onboarding]

* Merging logic
  * Contact/Profile merging logic → [PRD - Profile unification (CAAC &

CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-

JSoEJ1bZ6TsM/edit)

  * Field merging logic → [PRD - Profile unification (CAAC &

CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-

JSoEJ1bZ6TsM/edit)

  * Tag merging logic
  * Phone merging logic
* Contact import logic
  * Import via UI
  * Import via API → [PRD - Profile

API](https://docs.google.com/document/d/1JNTwiI0hXYqHeHEo3rZaWE7m4m9rCcO6LOk-

TphACL4/edit)

* Migration/ admin changes
  * New client flow → default on [PRD - Profile unification (CAAC &

CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-

JSoEJ1bZ6TsM/edit) A

  * Migration flow → progress Status (Time estimation for profile data sync：10K contact/min,

2M contact/200 min) [PRD - Profile unification (CAAC &

CDH)](https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-

JSoEJ1bZ6TsM/edit)

B![](https://content.gitbook.com/content/GBP3mPdNeU7kBvG5sba7/blobs/O7qfekbyvDmX0i

HjSewp/Unknown%20image)

* Ways to change profile merging logic for future profiles
  * Ways to undo merged profiles → snapshot restore 工單 \[CS] → need to ensure MAAC snapshot
* Behavior for existing features
  * Display profile fields (include tag)
  * Search for contact by profile fields (include tag) → covered by CQS, desired
  * Apply in segments → use MAAC for now, future to read CDH segment
    1. Remove CDH filter
    2. Add LINE UID filter in segment
  * Trigger and action with CDH profile (journey and richmenu) → tag workaround for now, future to use CDH field
  * Visualization for dashboard and reports → Not in scope
  * Data exports and imports (BQ, API, native integrations) → in profile API scope
* Edge cases
  * Error handling when we couldn't unify some profiles
    1. connect id
  * When it's unified wrongly, what can/should users do?
    1. supported by audit log with [metabase](https://play.cresclab.com/dashboard/128-cdh-auditlog?date_range=2024-04-23~2024-05-03\&maacbotid=1\&maaclineuid=U463c4fc03e3b9493c3fe8b1b37b4343f\&caac_channelid=3\&caac_memberuid=\&known_member_id=) \[CS] → need to ensure MAAC audit log

Scope

Before vs after

1. Merging logic
2. Profile merging logic: by phone, email, customer_id, connect_id, LINE_id
3. Tag merging logic: 1. **inherited tag**: tags created during unifying profiles in CDH. They are redundant and exist for UX-consistent purposes. So after merging, it will show on the profile and could be used in segment. 2. **tag**: the normal tags sent from CDH to applications. so after merging, it could trigger journey, richmenu
4. Phone merging logic: 1. Overall create member with both original & display phone 2. Updated rule have some exceptions, and follow below rule:
   1. If the system can recognize that the phone has been updated from LINE, update only the LINE original phone and follow the original LINE phone process.
   2. If the display_phone does not exist, then update the display_phone, e.g., LIFF/PNP binding, SMS bindlink (with PNP).
   3. Import contact (via file/API)
   4. import key is phone: If the same display_phone cannot be found, then create a new contact.

5. import key isn't phone: If the same contact can be identified, then update the display_phone.

6. Update contact API, or agent Manual update only update display_phone

5. Field merging logic: show the newest data
6. Contact import logic: follow 1b, 1c, 1d login
7. Migration/ admin changes
8. Migration flow for first-time 1. Clients without contact profile unification rule setting in admin center, then nothing happen. 2. Clients with contact profile unification rule setting in admin center,

1. will merge the LINE channel entity with phone channel entity

9. Ways to change profile merging logic for future profiles 1. Clients change the contact profile unification rule setting in admin center.

10. Ways to undo merged profiles → cannot do so

11. Behaviour for existing features
12. Search for contact by profile fields (include tag)
13. Display profile fields (include tag)

14. Search and display for segments → use MAAC for now, future to read CDH segment

15. Trigger and action with CDH profile (journey and richmenu) → tag workaround for now,

future to use CDH field

16. Visualization for dashboard and reports → Not in scope

17. Data exports and imports (BQ, API, native integrations) → in profile API scope

18. Edge cases
19. Error handling when we couldn't unify some profiles 1. connect id
20. When it's unified wrongly, what can/should users do?

—--no use

* Dependency user stories:
  * 億進:
    * Avoid sending both SMS and LINE messages to the same user who has already interacted. Manually remove the interacted parties before sending.
  * 美科:
    * Brief type (sending LINE and SMS synchronously, sending SMS once again the day after sending LINE); Send SMS again if there is no interaction on LINE for several days.
    * Hope to send LINE first and then SMS to save costs. (Currently divided into two packages for operation)
  * ASO:
    * Expecting to use Journey to send LINE first, then send SMS according to the value of customer repurchase.
    * Hope to track the number of clicks on short URLs and store consumption records, and send a second SMS to those without behavior tracking.

####

####

Solution of User Story 1 (by Jalex)

Who could be collected in a segment?

1. Entity which follows Line OA => A, B
2. Entity which has phone => B, C, D

Therefore, all possible segment outputs are {A, B, C, D}.

There is no such thing called F & G in the segment because MAAC doesn't know which LINE entity and Phone entity are unified.

User story 1:

As a marketer, I want to deliver regular marketing campaign information but prevent repeat msgs across different channels to the same contact, to ensure my budget doesn't waste on repeated information and prevent increasing blocking rate due to too bother contacts.

Use cases:

* Case 1: As a marketer, I want to reach entities, who have blocked my LINE OA, through SMS to increase the active LINE friends.

* Case 2: As a marketer, I want to reach entities, who haven't been reached through a LINE

campaign, through SMS, to increase the LINE engagement (wake up sleeping friends)

* Case 3: As a marketer, I want to reach entities, who receive a LINE message but don't open it yet, through SMS, to ensure the important message deliver to the consumer.

Use Case	Filter Condition	Expected Segment Output
Case 1	(1) Block Line OA AND (2) Has Phone	D
Case 2	(1) Has Phone AND (2) exclude Line Entity Only segment (*1).	C, D
Case 3	sol1: (1) Line Entity Only AND (2) Has Phone AND (3) exclude Open XXX message segment (2).sol2: (1) Line Entity Only AND (2) Has Phone AND (3) NOT Open XXX message (*3)	B

*1: Excluding a line entity only segment is a must-have. Otherwise, the final output may miss some Phone entities (C in the excluded segment).

*2: Segment doesn't provide a filter condition for "NOT Open XXX message". Therefore, we need to create another segment to make it possible.

*3: We add another filter condition to filter "NOT Open XXX message" directly instead of excluding another segment, which is much more user-friendly.

Solution:

To achieve the user story and its 3 use cases, the segment needs to have the capability to:

1. Collect Line entity only.
2. Collect Blocked Line entity.
3. Collect NOT Open XXX message (Optional) → since will revamp segment in Q4, so not to

add it now

Meeting notes 2024-06-21

Decisions to be aligned

1. MAAC's m2 scope (and where it needs data team help)
2. 原本 M1 7/16: 要完成 MAAC x CAAC, LINE x SMS

3. 現在 拆成 M1 M2 1. M1: LINE x SMS 2. M2: MAAC x CAAC
4. M2 MAAC x CAAC - syncs events from CDH (not direct R/W)
5. Scope: 1. 先做到 CDH tag 可以 trigger MAAC 機制，先做到 bundle (沒有 migration 的版

本) 2. 跨系統可以同名，但 MAAC 要顯示 source 3. MAAC 擋掉所有 other source 的 tag

deleted/created/update，僅支援 tag attach add/remove
6. 標籤重複的處理： 1. admin center 可以選擇開始合併 2. 開啟 CDH 時，針對 CAAC 重複的

標籤名稱，自動加上 postfix 3. 後續，MAAC CAAC 不能建立重複的標籤

7. Tag manager: 因要考量的議題多，因此不在 Profile unification M2 處理

8. Action 1. [Poga Po](mailto:poga.po@cresclab.com)help to check if MAAC 有吃從 CDH 來

的 tag source → created via, attached via 2. [Gordon Chang](mailto:gordon@cresclab.com)to

prepare a list MAAC/CAAC <> deleted/created/update/tag attach add/tag attach remove 3.

[Gordon Chang](mailto:gordon@cresclab.com)to ask Jalex to get data team to help on sync

tag postfix 4. [Gordon Chang](mailto:gordon@cresclab.com)([Lydia

Hou](mailto:lydia.hou@cresclab.com)) to 盤點是否有因為 latency 10mins 會造成的問題 5.

[Gordon Chang](mailto:gordon@cresclab.com) to drive CDH tag 未來的整合和規劃

Note:

1. 未來直接讀 CDH tag

2. Data effort: Tag mgmt 的 API 需要 data 的工，其他 tag (deleted, created, attached, removed) 已有

3. 未來 Tag manager
4. \[current] tag name, contact count, expiry
5. \[new] created via, tagged via
6. 要確認 1. data 有存 created via, tagged via 2. app 端可以接收資訊
7. M2 timeline (when do maac and data team build this)
8. Caac's timeline to reflect

Decisions aligned

Action items

Notes

PRD　Profile unification (CAAC & CDH)

Profile unification (CAAC\&CDH) PRD

Mapping profiles across channels and products

PM owner [Jenny Chin](mailto:jenny.chin@cresclab.com)**Eng owner** [TY C](mailto:ty@cresclab.com)**PD owner** [Saha Chuang](mailto:saha.chuang@cresclab.com)	**💬Slack channel** [#proj-customer360](https://chatbotgang.slack.com/archives/C04EDDSEV08)**⏱Asana** [CDH](https://app.asana.com/0/1204010721938900/1204023124119594)**📂Notion**

Version history

Version	Date	Description	Editor
Ver. 1	2023-12-16	Template draft	[Jenny Chin](mailto:jenny.chin@cresclab.com)

| Ver. 2 | 2024-01-03 | Unification logic and user flow aligned. Content updated according to discussions
| [Jenny Chin](mailto:jenny.chin@cresclab.com) |
| Ver. 3 | 2024-03-26 | Cancel unification import in this PRD. Move it to [PRD - Profile API](https://docs.google.com/document/d/1JNTwiI0hXYqHeHEo3rZaWE7m4m9rCcO6LOk-TphACL4/edit#heading=h.7z5imn1sorpi) |
[Jenny Chin](mailto:jenny.chin@cresclab.com) |
| Ver. 4 | 2024-04-23 | Cancel 'change unified profile' Update note data structure to avoid merge conflict. The note optimization spec is in [PRD - Note optimization](https://docs.google.com/document/d/14-FKj5JPAdnUw83xd-4xqen63BHxdgj1ElptNg9EJr4/edit#heading=h.wp4lywq1pi6a) | Person
|

Release notes

Profile unification provides a 360-degree understanding of your customer across communication channels and systems. Help brands to build continuous customer journeys and engage customers with full context and personalization.

Goal

* Support Apps (MAAC, CAAC) multichannel synergy value
* Improve CL product's Enterprise readiness by providing cross-org profile unification
* Build a flexible foundation of future CDP product

Background

* Profile unification is a must-have when we provide omnichannel service since users expect contextual management of contacts' engagement across channels, not on independent channels.
* This was a sub-project under [PRD - Omnichannel - FB/IG](https://docs.google.com/document/u/0/d/1cf3VeGZO6C6HTw3y6NT-E2Fbbc_cdqgYoGUZT2B89XM/edit). During the project's progress, we separated it as an independent project considering its complexity and Eng ownership differences.

Strategy

* As the CL product suite's complexity increased, we have more than 1 product and are growing to add more modules. We need a platform layer for efficient data exchange and management.
* The top priority of data consolidation and management would be customer data since personalization is a core value for all CL's products. That's why we built CDH.
* CDH's short-term to mid-term goal:
  * short-term: internal product for supporting CL product suite's contact data management and acting as a segment engine.
  * mid-term: an independent CDP product
  * long-term: in discussion.
* Break down the short-term goal, the themes include:

* Contact data sharing across CL products to enhance product bundle value
  * Support profile unification for omnichannel strategy
  * Consolidate and exchange engagement data from CL products to support personalized engagement on Apps
  * Enable data exchange with 3rd party systems to support more personalized engagement on Apps
  * Provide diverse filters and AI models for segmentation and export to CL Apps or 3rd party system for personalized engagement
* This PRD scope is under Theme 2, please see [PRD - Omnichannel - FB/IG](https://docs.google.com/document/u/0/d/1cf3VeGZO6C6HTw3y6NT-E2Fbbc_cdqgYoGUZT2B89XM/edit) for omnichannel strategy and details

Scope

* In scope
  * Profile unification within single product by up to 3 unify keys
  * Profile unification across two products by up to 3 unify keys
  * Profile unification across multiple orgs and two products by up to 3 unify keys
  * Provide profile change audit log through CS/Metabase
  * Cross-products "application > CDH" page
* Out of scope (future extension)
  * More than 3 unify keys
  * Probabilistic mapping
  * Display profile change audit log on UI
  * Profile unification (MAAC) [PRD - Profile unification (MAAC)](https://docs.google.com/document/d/1-H6hKZ1Y8OV5_OHpl1ATiBCemVlS5DcCTIpXeG4Fmfw/edit)

User story

* As a service agent, I want to interact with customers with full context across channels and systems, so I can tailor the service for better customer satisfaction
* As a marketer, I want to use 360-degree profile data to facilitate cross-channel personalized customer journeys to enhance marketing ROI

Success metric

* Adoption
  * ## of unique orgs enabled unification rule setting on CAAC
  * ## of unique orgs enabled unification rule setting on CDH
  * ## of orgs import unify key data through OpenAPI
  * **Success criteria: 20% unique org adopted profile unification**

Glossary definition

Reminder: Update the [Product Dictionary](https://www.notion.so/cresclab/08666630ee444b44b349bdb60ec40c19?v=2281968133d64b11b25d206dd86780d4\&pvs=4)

Product term	**Code term**	**Definition**
unify_scope_id		Each CAAC organization or MAAC organization has its own "unify_scope_id" which is used to define the scope mapping profiles
Unify Key		1~3 profile columns chosen by users used to mapping profile
Contact profile		Org-level unified contact profile that has been consolidated from multiple channel entities.
Channel entity		Channel-level contact data
Unmerge profile		The action used to clean all unify keys in an entity profile and make it an independent contact profile.

Feature spec

A) Profile unification architecture

* **CDH as the profile unification center**
  * Both CAAC and MAAC use CDH as profile unification center by mapping \<unify_scope_id> and
    * unify_scope_id: an org-level value to define unify scope which is stored in CDH
    * unify key: 1~3 profile columns chosen by users used to mapping profile
    * distinct key: 1 optional choice from the selected unify keys. This is the distinct value to specify different contacts even if they share other unify keys.(cancel due to technical complexity)
  * This is a default enabled function for both product users. (no need to switch on)
  * Note: This will not affect the future extension for CDH to become an independent product. It's standalone sales depend on features accessibility

* **Determination of data mapping scope**
  * CDH uses \<unify_scope_id> to define the unification scope.
    * For single organization
      * MAAC and CAAC have their own unify_scope_id for single app profile unification
      * If a user integrates apps with CDH, the system updates both apps with the same unify_scope_id.
      * If a user disconnects apps with CDH, the system updates each app with different unify_scope_id.
    * For multiple organizations
      * If users want to sync profile data across multiple organizations, this should be confirmed through contract, then CS creates a support ticket to identify the organizations. The progress for unification from ticket-request would be notified by CS manually.
      * Data team will manually update all the identified orgs with the same unify_scope_id.

B) Profile unification logic

* **unify scope and Unify key**
  * unify_scope_id: an org-level value to define unify scope which is stored in CDH
  * unify key: 1\~3 profile columns chosen by users used to mapping profile
* **Unification**
  * CDH specifies the same contact, by mapping \<unify_scope_id> and , and unifies their profile data.
    * After unification, all the data updates will be synced across these channel entity profiles
    * **Time estimation for profile data sync：10K contact/min, 2M contact/200 min**

* **Profile Coalesce Preference**
  * During the case that** one contact profile** consists of **multiple channel entities**, we handle the coalesce by
    * Priority:

1. Pick Not NULL values instead of recentest-but-NULL values
2. Pick the later coming one. That is, priority is given to the data value which was updated most recently

* workflow use case:
  * When there are two entities merged into one contact profile. The process takes preference on the not null value first, then later updated value.
  * When the user edits on the UI which displays two channel entities, I can erase the specific attribute to be NULL. The process erases the two entities' attributes.
* when does the workflow works:
  * CAAC or MAAC : fetches profile for any reason (re-initial member profile after unification changed, contact profile api)
  * CDH : does initial member
* **De-sync**
  * **Unmerge profile 取消合併**
    * Users can use "unmerge profile" to clean all unify keys (except LINE uid) in an entity profile and make it an independent contact profile.
    * After profile unmerged, all profile columns remain the same except unify keys.
    * Flow: click "unmerge profile" -> confirm clean up all unify keys -> become an independent contact profile with empty unify keys
* * ** Change unified profile 更改合併聯絡人 (Canceled)**
    * Users can remove a channel entity from an existing profile and merge it with another existing profile.

* The action will remove all column data except channel entity data to merge with the other profile.
    * Flow: click "change unified profile" -> choose the unify key column (except LINE uid) for mapping -> enter the unify key value -> merge with another existing profile.

C) Contact profile change

* Adjust display name rule
  * Default {display_name} is empty. Insert original name to show on display name column. When {display_name} is empty, unified contact profile will show the channel's original name.
  * When edit {display_name}, this column will be unified. So each unified profile will show the same name.
* Add column to contact profile
  * Connect id: a manual input column can be used as an unify key to specify which channel entities are the same contact.
   * Permission
    * CAAC: follow existing [role permission](https://docs.google.com/spreadsheets/d/15F7k29bXL98UPI0AihHOM93h2_AKb-r_G89j3_ml2t8/edit?pli=1#gid=203101028), only primary agent and above roles can edit.
    * MAAC: out of scope. add it when 2024Q2 deal with MAAC profile unification. So does the connect_id display profile.
* Update contact profile layout by org-level contact profile with channel entity data
  * Org-level contact profile
    * The unified data do describe a contact's 360-degree information. See [Customer 360](https://docs.google.com/spreadsheets/u/0/d/15yRH-nOc0z4ikZpJoLDD8x9AuPWQNWmqfzcDSFvZtkg/edit)-Contact profile tab for columns.
    * **This level's data editing will affect all connected channel entities**
    * **Note: If user change unify_key attribute's value. Apps cannot modify its db, it should leave CDH to handle it.**
  * Channel entity data
    * Each channel entity profile keeps the channel-original data and unify keys.
    * See [Customer 360](https://docs.google.com/spreadsheets/u/0/d/15yRH-nOc0z4ikZpJoLDD8x9AuPWQNWmqfzcDSFvZtkg/edit)-Channel entity tab for columns.

D) Unification rule settings

* **CAAC unification rule setting**
  * This setting applies to CAAC only.
  * **CAAC: Org setting > Channel > Unification**
    * Unify key: user can choose up to 3 unify keys, contact profiles mapped by each one of them will be unified.

* Drop down menu selection: No, Phone, email, customer id, LINE uid, Connect id
        * Default = no
      * Setting confirmation: When saving the editing, pop up an alert modal to confirm with user
* MAAC unification rule
  * setting: out of scope. add it when 2024Q2 deal with MAAC profile unification
  * Plan: Add "Data" to account setting
* **CDH unification rule setting**
  * This setting will overwrite the setting on each app and apply to both apps.
  * Add a cross-product "application" page for all application settings and management. CDH will be the first app on this page.
  * **Setting flow: Cross-product application page > CDH module > Unification rule setting**
    * First time installation
      * User click CDH module > install
      * Complete installation steps with unify key setting
      * When all installation steps are completed, the CDH is connected with a user-defined unify key setting. This setting will overwrite the setting on each app.
    * Change unification rule setting
      * User click CDH module > details
      * User click Unification rule setting > edit
      * When users apply the new unify key settings, the system merges the profiles by new defined unify keys.
  * **Disconnect flow:**
    * User click CDH module > details
    * User click Disconnect
* When users confirm the disconnection, the used-to-been-connected-orgs still share the same unify_keys but under different unify_ scope_id. That is, all used-to-been-connected-orgs are intra-org unified.

F) Audit log for profile unification

* In scope accessibility - Provide by CS
  * [Audit log](https://play.cresclab.com/dashboard/128-cdh-auditlog?date_range=2024-04-23~2024-05-03\&maacbotid=1\&maaclineuid=U463c4fc03e3b9493c3fe8b1b37b4343f\&caac_channelid=3\&caac_memberuid=\&known_member_id=) includes , ,
  * When client's have needs, they raise request to CS with timeframe needed
  * Eng create a metabase dashboard for CS to check (export csv)
* Future accessibility - Visible on UI
  * Add \<changed by whom/which event>
  * Out of scope. Need further discussion and planning.

Release plan

Release region

Please check the gray out feature list ([Link])(https://www.notion.so/cresclab/Product-Availability-e9e275930be946c2b471077b02f7556e)

- TW	- TH	- JP

Development Documents

Design docs

* Design doc
  * [Profile unification](https://www.figma.com/file/k0XwP83RAV16nVdyFx7crb/Omnichannel-inbox?type=design\&node-id=4765%3A41125\&mode=design\&t=BHmMrRrff4H0gYDa-1) (20240207)
* Prototype

Technical docs

* BE design doc
  * Latency
    * Modify contact profile: 3 \~ 5 seconds
    * Modify unify key:
      * Overall update org's profile (estimating)
      * Query specific 1 profile: < 1 min
    * Unmerge entities:
      * < 1 mins
    * Change unify key value of the member
      * Overall update org's profile (estimating)

References

* [unification logic candidates](https://chatbotgang.slack.com/archives/C04EDDSEV08/p1702453311876849)
* [existing products](https://chatbotgang.slack.com/archives/C04EDDSEV08/p1702471946244039)

QA docs

* [Test case](https://docs.google.com/spreadsheets/d/1iz28JaHglO0DaHSmTPb98777x6wbgRU7srsoAeu_Y9I/edit#gid=502134957)

Discussion and open questions

Keep Distinct Key or not

* Test Cases:
* setting: distinct_key(c_id), unify_key(mobile)
  * A : dk(c_id=1), mobile=0911
  * B : dk(c_id=2), mobile=0911
  * C : dk(c_id=NULL), mobile=0911

* D : dk(c_id=NULL), mobile=0911
* worflow：
  * C shows (c_id =NULL, mobile=0911)
  * A shows (c_id=NULL, mobile=NULL)
  * A sets (c_id = x)
  * A sets (mobile = 0911)
* (Distinct Key) Based on TreasureData: trustable table has a unique ID, and two IDs in the table shouldn't be merged, even if other kinds of IDs indicate that they should be merged.
* **Is the distinct key a good solution?**
  * SMB:
    * might use multiple unify_key（with OR to compose）
    * not likely to have connect_id or CRM
  * Enterprise:
    * might have CRM and managed connect_id
    * just use the only `connect_id` as unify key instead distinct key

CL Customer 360

Group profile

	A	C	G
1	Group profile		
2	Info	Description CAAC Permission	
3	Basic information		
4	star mark	To mark a customer for easier recognition	E
5	Group id	從 api 取得的 group id	-
6	Group pic	從 api 取得的 group pic	V
7	Display name	1. 此欄位預設為空，由 agent 手動編輯 2. 空值時，介面上顯示 original name，但資料庫為空	E
8	Original name	從 api 取得的 group name	-

9	Member avatar	該 group 中的 LINE channel entity 的 avatar	V
10	Member name	1. 該 group 中的 LINE channel entity 的 display name 2. 點擊可進入該 Contact profile	V
11	Note	note	E

Contact profile

Section	Info	API name	Description	MAAC Permission	CAAC Permission	API Permission	rubato database column {table_name.column_name}	cantata database column {table_name.column_name}	column_name	CDH category	Note
Basic information											
	star mark	star_mark	To mark a customer for easier recognition	-	E	E			star_mark		
	Display name	display_name	See details below	E	E	E	line_member.name	channel_member.display_name	display_name	member	CAAC and MAAC are able to receive profile change events from CDP, which enables them to modify values. This mechanism is referred to as red cell.
	Full name	full_name	For the real name, which may be hidden from low-permission users	E	E	E	line_member.name	channel_member.name	full_name		(the value in the parenthesis is recorded but is out out redbox)
	Phone	display_mobile	Default 帶入 LINE phone	E	E	E	line_member.mobile; line_member.original_mobile	channel_member.display_mobile; channel_member.original_mobile	display_mobile;		

	original_mobile	member	
	Email	display_email	
E	E	E	line_member.email; line_member.original_email	channel_member.display_email; channel_member.original_email	display_email; original_email	member
	Country (Region)	region	
E*	E	E			channel_member.country	country	
	City	city	
E*	E	E			channel_member.city	city	
	Address	address	
E*	E	E			channel_member.location	location	member
	Age	age	Calculated by system
V*	V	V			
	Birthday	birthday	
E	E	E	line_member.birthday	channel_member.birthday	birthday	member
	Gender	gender	選項：Male/Female/Other；Default 顯示順序：抓 FB gender -> CL 預測 -> Unknown、手動更新會覆蓋 Default 顯示
E	E	E	line_member.gender	channel_member.gender	gender	member
	company	company	For B2B business to record customer's company for contextual communication
E*	E	E		channel_member.company	company	
	Account manager	account_manager	
V*	E	V		channel_member.acoount_manager	acoount_manager	

Category	Field name	Field key	Description				Mapping		
Contact status	Contact status	contact_status	To know the customer is reachable or not Active: reachable with at least 1 channel Inactive: no reachable channels	-	-	-	channel_member.status		The value lists of MAAC and CAAC are different.
	Customer id	customer_id	Clients CRM customer id	E	E	E	line_member.bind_id channel_member.custom_id	custom_id	member
	member level	member_level	To know the loyalty level of the customer ; P1 fill in manually, P3 update API	E*	E	E	member_level		
	(AI) Engagement level	engagement_level (only get)	To know the customer's engagement willing ; Lv1-5 (MAAC)	V	V	V	line_member.health	health	member
	Connect id	connect_id	a manual input column can be used as an unify key to specify which channel entities are the same contact.	E	E	E	connect_id		
Arbitrary data									
	Customized Field 1	customized_field_1	Define in admin center, Import via API/BQ, apps UI	E	E	E			

	Customized Field 2	customized_field_2	Define in admin center, Import via API/BQ, apps UI	E	E
E				
	Customized Field 3	customized_field_3	Define in admin center, Import via API/BQ, apps UI	E	E
E				
	Customized Field 4	customized_field_4	Define in admin center, Import via API/BQ, apps UI	E	E
E				
	Customized Field 5	customized_field_5	Define in admin center, Import via API/BQ, apps UI	E	E
E				

{% stepper %}
{% step %}

Display name — Detail 1

此欄位預設為空，由 agent 手動編輯
{% endstep %}

{% step %}

Display name — Detail 2

空值時，介面上顯示 original name，但資料庫為空
{% endstep %}

{% step %}

Display name — Detail 3

當 Contact 下面有多個 original name 時，Display update time 最新的
{% endstep %}
{% endstepper %}

Customer360

Row	Info Description	Definition	PII	Phase	New column to add?	Field type	MAAC Permission	CAAC Permission	UI Field / Validation	UI Field / Validation rule	BE domain length limit	rubato database column {table_name}.{column_name}	cantata database column {table_name}.{column_name}	{column_name}	CDP category (fixed, member, tag)	Note
4	Display name	Current name column — if users delete the content, use customers LINE display name 預設顯示該聯絡人於 LINE 的用戶名稱；User 僅能變更該聯絡人在漸強名單中的顯示名稱。		1		input	E	E	Requires Verification	Max 255 characters	Max 255 characters	line_member.name	channel_member.display_name	display_name	member	CAAC and MAAC are able to receive profile change events from CDP, which enables them to modify values. This mechanism is referred to as red cell.
5	Name	Add this new column for the real name, which may be hidden from low-permission users	v	1	v	input	E	E	Requires Verification	Max 255 characters	Max 255					

characters
| | |
| | (the value in the parenthesis is recorded but is out out redbox)
|
| 6 | LINE Name | Line name setting by customers

| 顯示該聯絡人於 LINE 的用戶名稱, 在 LINE 訊息中，系統尚未取得名稱資料時，會以「新朋友」稱呼

| | 1 | | input | V | V | No validation required | Follow LINE rules Max 20 characters
| Follow LINE rules

| line_member.original_name | channel_member.original_name
| original_name | member | included in CDP but not in list :
\[channel_id, bot_id, org_uuid] |

| 7 | Phone
|
| 聯絡人的手機號碼

| v | 1 | | input | E | E | Requires Verification | Default is empty; CAAC {display_mobile} max 16 number; MAAC +886 max N number | CAAC {display_mobile} max 32 number

| line_member.mobile; line_member.original_mobile | channel_member.display_mobile; channel_member.original_mobile | display_mobile; original_mobile | member
|
|

| 8 | Email
|
| 聯絡人的電子信箱

| v | 1 | | input | E | E | Requires Verification | default is empty; format: @mail
| Max 255 characters

| line_member.email; line_member.original_email | channel_member.display_email; channel_member.original_email | display_email; original_email | member |

|

| 9 | Country (Region) | Enhance personalized marketing or service | 聯絡人通訊地址所在的國家（地區） Country (Region) 名單: 1. 根據所在地的居留人國籍統計，分析高相關性的地區選單需求 2. 從高相關性地區選單中、剔除非亞太區域國家（因為超出品牌區域管理單位，最大即為亞太區，超出此範圍會有不同區域部門管理）

| | 1 | v | select | E | E | No validation required | options: Cambodia; China; Hong Kong; India; Indonesia; Japan; Korea, South; Macau; Malaysia; Myanmar (Burma); Philippines; Singapore; Taiwan; Thailand; Vietnam; Other | "kh": "Cambodia", "cn": "China", "hk": "Hong Kong", "in": "India", "id": "Indonesia", "jp": "Japan", "kr": "Korea, South", "mo": "Macau", "my": "Malaysia", "mm": "Myanmar (Burma)", "ph": "Philippines", "sg": "Singapore", "tw": "Taiwan", "th": "Thailand", "vn": "Vietnam", "other": "Other" — Max 255 characters |

| |

|

| 10 | City | Enhance personalized marketing or service | 聯絡人通訊地址所在的城市

| | 1 | v | input | E | E | No validation required | default is empty | Max 255 characters

| |

|

| 11 | Address | Enhance personalized marketing or service | 聯絡人的詳細通訊地址

| v | 1 | v | input | E | E | No

validation required | default is empty

| Follow Data base limit 65535

bytes

| | channel_member.location | |

location | member |

|

| 12 | Age | Enhance personalized marketing or service —

Calculated by system

| 系統依據聯絡人生日，自動計算的年齡。負的年齡值以 -- 標示(未出生的年齡）

| | 1 | v | System data | V | V | No

validation required | default is --（生日未設定也會顯示） 負的年齡值以 -- 標示（未出生的年齡） | default is

Null; 負的年齡值以 -- 標示（未出生的年齡）

| | | |

| | |

|

| 13 | Birthday

|

| 聯絡人的生日

| v | 1 | | date picker | E | E | No

validation required | YYYY-MM-DD

| Max 10

characters

| line_member.birthday | channel_member.birthday

| birthday | member |

|

| 14 | Gender

|

| 聯絡人的性別 — MAAC 自動猜一個性別: Consumer's data import from CRM by API.

[thread](https://chatbotgang.slack.com/archives/C04EDDSEV08/p1682328900446959?thread_ts=1682324363.808939\&cid=C04EDDSEV08) | | 1 | | select

| E | E | No validation required | 用戶只能選"Female", "Male", "Others" | Max 32 characters; "Female", "Male", "Others","unknown" — "Unknown" 一開始加入時顯示

| line_member.gender | channel_member.gender

| gender | member |

|

| 15 | Reachable channels | show reachable channel icons — Future extend: order by preferred channels
|
| | | | | | | |
|
|
| | | |
| | |
|
| 16 | company | For B2B business to record customer's company for contextual communication
|
| v | 1 | v | input | E | E | Requires Verification | Default is empty; Custom Input Max 100 characters | Max 255 characters
| | | |
| | |
|
| 17 | marital status | new
|
| v | | | | | |
|
|
| | | |
| | |
|
| 18 | children | new
|
| v | | | | | |
|
|
| | | |
| | |
|

| 19 | Tags | sort by newest tags |
| | 1 | | Tab to show Tags; Add tag : Select + dropdown | E | E | Requires Verification | CAAC Tags Max 255 characters; MAAC Tags Max 50 characters | CAAC Tag Max 255 characters (code 編碼轉換)

| 20 | Account manager | | |
| | 1 | | v | input | V | E | No validation required | Custom Input; No validation required | Max 255 characters

| 21 | Account status | | |

| 22 | Account status | To know the customer is reachable or not — LINE active/block (P1)

| Account status 的定義是跨渠道的 status, 所以 CAAC 維持使用 active/inactive; MAAC 應該會在邁入跨渠道時，要調整這個 column 的欄位定義&值, 暫時不處理 (等 SMS broadcast release 時處理) Thread | | 1 | | badge

| V | V | No validation required | MAAC : FollowingBlocked/Auth; CAAC : Active/Blocked — Active = Reachable; inactive = LINE auth or blocked

| Max 32 characters; MAAC : FollowingBlocked/Auth; CAAC : Active/inactive

| line_member.status | channel_member.status

			The value lists of MAAC and CAAC are different.
23	Registeration status	badge: opt-in
		1					
24	member level	To know the loyalty level of the customer — P1 fill in manually, P3 update API
		1	v	input	E	E	No validation required	Custom Input	Max 32 characters
25	star mark	To mark a customer for easier recognition (The meaning of the mark could be defined by each client...)
		1	v	badge	-	E	No validation required	True/False; Default is false	boolean (true & false)
26	Client type	badge: buyer
27	AI enrichment: Customer value & interest

#	Field	Values	Type		
28	(AI) Lifetime value	level(low, medium, high), or a value			
	3-2	System data	V	V	
29	(AI) likelihood to purchase	low, medium, high			
	3-2	System data	V	V	
30	(AI) likelihood to churn	low, medium, high			
	2/3	System data	V	V	
31	(AI) Next cart value	level(low, medium, high), or a value			
	3-2	System data	V	V	
32	(AI) Discount affinity	low, medium, high			
	3-2	System data	V	V	

| 33 | (AI) Engagement level | To know the customer's engagement willing — Lv1-5 (MAAC) | 收集聯絡人在 LINE OA 的互動行為及 GA 相關數據（需完成串接），透過 AI 進行分群分析。數字越高表示聯絡人活躍，而數字越低則顯示聯絡人互動不頻繁。 | | 1 | | System data | V | V | No validation required | Lv1,Lv2,Lv3,L4,Lv5 — Default Lv1 | Max 32 characters | line_member.health | health | member | |

| 34 | (AI) Interest cluster | some categories or tags | | 3-2 | | System data | V | V | | | | | | |

| 35 | ID | | | | | | | | | | | | | |

| 36 | CL contact id | To cross-product and cross-channel recognize a customer | | 1 | v | System data | - | - | No validation required | Unicode | | | | |

| 37 | Member id | Clients CRM customer id | | 1 | | input | E | E | No |

validation required | Unicode, Custom Input | Max 1024 characters

| line_member.bind_id | channel_member.custom_id | custom_id | member |
|

| 38 | GA client id
|

| v | - | v | System data | E | E | | Unicode
|

|

|

| 39 | LINE uid
|

| v | 1 | | System data | V | V | | Unicode
|

| line_member.line_id (# line_member.source= user) | channel_member.external_member_id (# channel_member.type= line) | (line_id) | fixed |
|

| 40 | FB account
|

| v | - | v | System data | E | E | | Unicode
|

|

|

| 41 | IG account
|

| v | - | v | System data | E | E | | Unicode
|

|

|

| 42 | 3rd-party ID
|

| | | | | | | |
|

#	Name	Description		System data	MAAC	CAAC	Format
45	Last engaged	MAAC, recorded by system	1	System data	V	-	YYYY-MM-DD
	line_member.last_engaged						last_engaged
46	Last chatted	CAAC, recorded by system	1	System data	-	V	YYYY-MM-DD
	channel_member.last_message_at						last_message_at
47	Created time on MAAC	MAAC recorded by system; 第一次進入產品建檔的時間 ≠ 加入官方帳號的時間; 顯示時間時區？最小 Day, 使用者電腦時區	1	System data	V	-	YYYY-MM-DD
	line_member.created_at (created_at)	fixed					
48	Created time on CAAC	CAAC recorded by system	1	System data	-	V	YYYY-MM-DD
	channel_member.created_at (created_at)	fixed					

49	Last visit			
GA				
	-	v	System data	V	V
50	Last order			
CRM/EC/POS				
	-	v	System data	V	V

52	note	If someone inputs a note > 2048 in MAAC and it is data-shared to CAAC we will truncate to 2048 and send back to MAAC truncated — rare but needs customer explanation ([thread](https://chatbotgang.slack.com/archives/C04EDDSEV08/p1688538527648779?thread_ts=1688491590.242889\&cid=C04EDDSEV08))
	1		input	E	E	No validation required	Max 2048 — 超過自動截斷
?					
line_memberextrainfo.remark	channel_member.note				
note					

User engagement / history sections (summarized entries)

* Engagement event (Phase 2)
  * start date
  * topic
  * channel
  * event type (open, click)
  * tag added (tag event history)
* Chat history (Phase 2)
  * start date
  * channel
  * assignee

* TTR (time to resolved)
  * CSAT value (by automatic survey after chat)
  * tag added
* User profile changed (Phase 2)
  * changed column (before, after)
  * changed by whom (account name)
* Web view history (Phase 3-1)
  * Date & time
  * device
  * duration
  * page visited (# of page, page link)
  * entry point (Email link, LINE push, website link...)
* Purchase history (Phase 3-1)
  * order id
  * date
  * channel (web, app, offline(stores))
  * order value
  * order quantity
  * order items / price

User highlight, Channel-specific engagement highlights, Product & Purchase highlights (Phase 3-3)

* Examples of intended metrics/features:
  * (AI) preferred engage time
  * avg opened/clicked/purchased rates (compare to others)
  * Channel-specific: LINE / PNP / SMS / Web push / Email responses (total delivered, open rate, click rate)
  * Product highlight: last recommended products, (AI) affinity for new products, replenishable products, last visited/purchased/abandoned products
  * Purchase highlight: top 5 purchased categories, total revenue, total orders, avg order quantity/value, most valuable order quantity/value

Notes & links

* Several Slack threads are referenced; links kept intact:
  *
<https://chatbotgang.slack.com/archives/C04EDDSEV08/p1682328900446959?thread_ts=1682324363.808939\\&cid=C04EDDSEV08>
  *
<https://chatbotgang.slack.com/archives/C04EDDSEV08/p1688538527648779?thread_ts=1688491590.242889\\&cid=C04EDDSEV08>

If you want, I can:

* Convert each major section (Basic information, Engagement history, Web view, Purchase history, Highlights) into separate GitBook pages.

* Turn any multi-step procedures into a stepper (if you point out which sequences should be stepper steps).
* Expand any specific rows into individual field docs with examples of UI rendering and validation.

Unification logic

	A	B	C	D	E	F	G	H	I
1		Despcription 使用用途	Data source 資料來源	Data level 資料層級	Merge 合併原則	Update 資料更新	Unmerge 拆成獨立聯絡人	Change unified profile 合併錯誤、併到另一個聯絡人	
2	Profile img	for recognize customer	From channel	Channel entity	維持原樣（不合併）	不可編輯	維持原樣		
3	Contact profile except columns below	for customer360 understanding	From channel (pic, name) Manual input API	Contact	新蓋舊 忽略空值	覆蓋全渠道	保留 Unmerge 當下狀態	清空、去和新的指定聯絡人合併	
4	\[Profile] Contact avatar		From channel	Channel entity	維持原樣（不合併）	不可編輯	維持原樣		
5	\[Profile] Unify key	for mapping profiles	From channel (LINE uid)	Channel entity	<p>聚合 (標注				

channel name)</p> | 不可編輯　　　　　　　　　　　| 只保留該原先 channel entity 的　 |

只保留該 channel entity 的、聚合到新的指定聯絡人　　　|　　　　　　　　　　　|

| 6 | <p>Manual input (Connect id, customer id, display email, display mobile)
API</p>

| Contact　　　　　　　　　　　　　| <p>新蓋舊
忽略空值</p>

| 覆蓋全渠道　　　　　　| 清空　　　　　　　| 清空　　　　　　　　　　|

|　　　　　　　　　|　　　　　|　　　　　|

| 7 | Note　　　　　　　　　　　　　　　| Record contact

characteristics, service notes　　　　　| <p>Manual input
API</p>

| Channel entity　　　| 聚合 (標注來源)　　　　| <p>新增（聚合 - 標注來源)
編輯

（只覆蓋自己）
刪除（統一消失）</p> | 只保留該原先 channel entity 的　 | 只保留該

channel entity 的、去和新的指定聯絡人合併　　　|　　　　　　　　|

| 8 | Tag　　　　　　　　　　　　　　　| Record custom value

including characteristics, interests, selling cycle, behavior | <p>Manual input
API</p>

| Contact　　　　　| 聚合 (重複值會合併)　　　| 覆蓋全渠道

| 保留 Unmerge 當下狀態　　| 清空、去和新的指定聯絡人合併　　　　　　　| note:

在 org level 的同一個 tag 會被 de-duplicate |

| 9 | Conversation history　　　　　　　　　　| Track

communication history　　　　　　　| System log

| Channel entity　　　| 聚合 (標注來源)　　　　| 事件新增（標注來源)

| 只保留該原先 channel entity 的　 | 只保留該 channel entity 的、去和新的指定聯絡人合併

|　　　　　　　|　　　|

| 10 | Engagement history　　　　　　　　　　　| Understand

interaction history　　　　　　　| System log　　　　　　　　|

Channel entity　　　| 聚合 (標注來源)　　　　| 事件新增（標注來源)

| 只保留該原先 channel entity 的　 | 只保留該 channel entity 的、去和新的指定聯絡人合併

|　　　　　　　|　　　|

| 11 |　　　　　　　　　　　　　　　|

|　　　　　　　|　　　|　　|　　　|

|　　　　　　| 先不 release　　　　　|　　　|

Notes:

* Preserved original structure, content, links and line breaks.

* Kept all query parameters and link targets exactly as provided.

Channel entity

Channel entity	Info	Description	MAAC Permission	CAAC Permission	rubato database column	cantata database column	CDH column	CDH category	Note
Phone channel entity	Phone							2024Q2	2024Q2
	Phone status	Valid/Invalid/Null Database 存、UI 不顯示						2024Q2	2024Q2
LINE Channel entity	Original name	Line name setting by customers	V	V	`line_member.original_name`	`channel_member.original_name`	`original_name`	member	included in CDP but not in list : \[channel_id, bot_id, org_uuid]
	LINE uid		V	V	<code>line_member.line_id</code> # line_member.source= user	<code>channel_member.external_member_id</code> # channel_member.type= line	(line_id)	fixed	
	LINE profile pic		V	V					
	LINE Phone	Phone number from LINE	-	-					
	LINE email	Email from LINE	-	-					
	LINE Status	Following/Auth/Blocked/Null Database 存、UI 不顯示	-	-	`line_member.status`				

Entity	Field	Description
FB Channel entity	FB ID	FB PSID
	Original name	first and last name
	FB profile pic	URL to the profile picture. The URL will expire
	FB gender	Database 存、UI 不顯示
	FB last msg at	Database 存、UI 不顯示
	FB timezone	Database 存、UI 不顯示
	FB language	Database 存、UI 不顯示
IG Channel entity	IG ID	IG scoped ID
	Original name	`ig.username`
	IG Name	`ig.name`
	IG profile pic	the URL for the contact's profile picture (can be null if pic not set). The URL will expire in a few days
	IG status	(IG) is_verified_user Database 存、UI 不顯示
System information	Last engaged	last_engaged_time (only get)
System data		

| `line_member.last_engaged` | | `last_engaged` |

| | Last chatted | last_chatted_time (only get)
| System data | - | V | V
| | `channel_member.last_message_at` | `last_message_at` |

| | Created time on MAAC | ceated_time_on_MAAC (only get)
| System data | V | - | V
| `line_member.created_at` | | (created_at) (fixed) |

| | Created time on CAAC | ceated_time_on_CAAC (only get)
| System data | - | V | V
| | `channel_member.created_at` | (created_at) (fixed) |

| Note | note | note
| input | E | E | E
| `line_memberextrainfo.remark` | `channel_member.note` | `note` |

| Tags | Tags | tags
| input | E | E | E
ID	CAAC Member id	
-	system		
	MAAC Member id	
system	-		

Notes:

* Database column names are shown in code style where present, preserving original naming and comments.
* Empty cells indicate no value provided in the original source.

Fields limitations

| Column Name |
Definition
| Column match | CDH Value |
Memo
| UI Field / Type | UI Field / Validation | UI Field / Validation rule
|
BE domain length limit | Support in Import CSV | Phase |
| -- | -- | --------------------------------------- | --- |

Tag (所在產品)	單一標籤的字數不可超過 50 字（不區分全型及半形）			
Tab to show Tags Add tag : Select + dropdown	Requires Verification	CAAC Tag Max 50 characters MAAC Tag Max 50 characters	CAAC Tag Max 50 characters	Y	1-1
CDP tags				
Tab to show Tags Add tag : Select + dropdown	No validation required	CAAC Tag Max 50 characters MAAC Tag Max 50 characters	CAAC Tag Max 50 characters MAAC Tag Max 50 characters	Y	1-1
Display Name in Crescendo Lab (Basic information)	預設顯示該聯絡人於 LINE 的用戶名稱；您僅能變更該聯絡人在漸強名單中的顯示名稱。			
{display_name}	Input	Requires Verification	Max 255 characters	Max 255 characters	1-1
Name				
		Max 255 characters	Max 255 characters	
LINE name	顯示該聯絡人於 LINE 的用戶名稱；您無法在漸強名單中變更該名稱。在 LINE 訊息中，系統尚未取得名稱資料時，會以「新朋友」稱呼。			

| {original_name} |

|

| System data | No validation required | Follow LINE rules Max 20 characters

|

Follow LINE rules | | 1-3 |
| Phone | 聯絡人的手機號碼

| <p>{display_mobile}
{original_mobile}</p> | |
| Input | No validation required | <p>default is empty
CAAC {display_mobile} max 16 number
MAAC +886 max N number</p>

|

CAAC {display_mobile} max 32 number | Y | 1-1 |
| Email | 聯絡人的電子信箱

| <p>{display_email}
{original_email}</p> |

|

| Input | Requires Verification | <p>default is empty (BE)
CAAC FE: maxLength: 255
format: @mail</p>

|

Max 255 characters | | 1-1 |
| Country (Region) | 聯絡人通訊地址所在的國家（地區）

| | |

<p>options:
Cambodia
China
Hong Kong
India
Indonesia
Japan
Korea, South
Macau
Malaysia
Myanmar (Burma)
Philippines
Singapore
Taiwan
Thailand
Vietnam
Other</p>
| Select | No validation required |

<p>options:
Cambodia
China
Hong Kong
India
Indonesia
Japan
Korea, South
Macau
Malaysia
Myanmar (Burma)
Philippines
Singapore
Taiwan
Thailand
Vietnam
Other</p>
| <p>"kh": "Cambodia",
"cn": "China",
"hk": "Hong Kong",
"in": "India",
"id":

"Indonesia",
"jp": "Japan",
"kr": "Korea, South",
"mo": "Macau"
"my": "Malaysia",
"mm": "Myanmar (Burma)",
"ph": "Philippines",
"sg": "Singapore",
"tw": "Taiwan",
"th": "Thailand",
"vn": "Vietnam",
"other": "Other"
Max 255 characters</p> | | 1-3 |

| City | 聯絡人通訊地址所在的城市

| |

|

| Input | No validation required | <p>default is empty
CAAC FE: maxLength: 255</p>

|

<p>be: no limit
db: Max 255 characters</p> | | 1-3 |

| Address | 聯絡人的詳細通訊地址

| {location} |

|

| Input | No validation required | <p>default is empty
CAAC FE: maxLength: 255</p>

|

<p>be: no limit
db: Max 255 characters</p> | | 1-3 |

| Age | 系統依據聯絡人生日，自動計算的年齡。

| | -- | 負的年齡值以 -- 標示(未出生的年齡）

| System data | No validation required | <p>default is -- （生日為設定也會顯示）
負的年齡值以 -- 標示（未出生的年齡）</p>

|

<p>default is Null
負的年齡值以 -- 標示（未出生的年齡）</p> | | 1-3 |

| Birthday | 聯絡人的生日

| {birthday} | YYYY-MM-DD

|

| Date picker | | YYYY-MM-DD

|

Max 10 characters | | 1-1 |

| Gender | 聯絡人的性別。
| {gender} | <p>options: Female/Male/Unknown/Others
default is unknown</p> | MAAC 自動猜一個性別 > Consumer's data import from CRM by API. [thread](https://chatbotgang.slack.com/archives/C04EDDSEV08/p1682328900446959?thread_ts=1682324363.808939\&cid=C04EDDSEV08) |
| Select | No validation required | 用戶只能選"Female", "Male", "Others"

|
| <p>Max 32 characters
"Female", "Male", "Others","unknown"
"unknown" 一開始加入時顯示</p> | | 1-1 |
| Company |
| |
|
| Input | Requires Verification | Custom Input Max 100 characters
|
| Max 255 characters | | 1-3 |
| Account manager | 啟用 CAAC 後，該聯絡人的負責專員
| |
|
| Input | No validation required | Custom Input; CAAC FE: maxLength: 255
|
| Max 255 characters | | 1-3 |
| Engagement level | 收集聯絡人在 LINE OA 的互動行為及 GA 相關數據（需完成串接），透過 AI 進行分群分析。數字越高表示聯絡人活躍，而數字越低則顯示聯絡人互動不頻繁。
| | <p>Lv1,Lv2,Lv3,L4,Lv5
Dedault Lv1</p>
|
| System data | No validation required |
<p>Lv1,Lv2,Lv3,L4,Lv5
Dedault Lv1</p>
|
| Max 32 characters | | 1-1 |

Account status	聯絡人在 LINE OA 的狀態。
Badge	No validation required	MAAC : FollowingBlocked/Auth CAAC : Active/Blocked Active = Reachable inactive = LINE auth or blocked
Max 32 characters MAAC : FollowingBlocked/Auth CAAC : Active/inactive	1-1
member status	Value = true if customer id is not empty. To know the customer is member or not (P1 fill in manually, P3 update API)
Badge	No validation required	true = true if customer id is not empty. will show badge False = if customer id is empty. wont show badge
boolean (true\&False)	1-1
member level	the loyalty level of the customer P1 fill in manually, P3 update API
Input	No validation required	Custom Input; CAAC FE: maxLength: 255
Max 255 characters	1-3
star mark	To mark a customer for easier recognition (The meaning of the mark could be difined by each client, will interview for the common use cases, then decide if we need extend or optimize this mark)
Badge	No validation required	True/False Default is false
boolean (true\&False)	TBD
(AI) Lifetime value	(AI) Customer value & interest
		level(low, medium, high), or a value
System data	No validation required
	3-2
(AI) likelihood to purchase	
		low, medium, high
System data	No validation required

Field	Priority	Description	Source	Validation	Notes
(AI) likelihood to churn	3-2	low, medium, high	System data	No validation required	
(AI) Next cart value	2	level(low, medium, high), or a value	System data	No validation required	
(AI) Discount affinity	3-2	low, medium, high	System data	No validation required	
(AI) Interest cluster	3-2	some categories or tags	System data	No validation required	
CL id (ID)	3-2	To cross-product and cross-channel recognize a customer; by system	System data	No validation required	unicode N number
Customer id	TBD	Clients CRM customer id	Input	No validation required	Custom Input; CAAC FE: maxLength: 255
LINE uid	1-1	Max 1024 characters	Input	No validation required	unicode
	1-1				

| Connect id | a manual input column can be used as an unify key to specify which channel entities are the same contact.

| | |

|

| | | CAAC FE: maxLength: 255

<p>be: no limit
db: no limit(text)</p> | | |

| Last engaged (System information) | MAAC, recorded by system

| | |

| System data | No validation required | YYYY-MM-DD

| | 1-1 |

| Last chatted | CAAC, recorded by system

| | |

| System data | No validation required | YYYY-MM-DD

| | 1-1 |

| Join time |

| | | <p>recorded by system; 第一次進入產品建檔的時間≠加入官方帳號的時間
顯示時間時區？最小 Day, 使用者電腦時區</p>

| System data | No validation required | YYYY-MM-DD

|

| | 1-1 |

| Note |

| | | 如果有人在 MAAC 輸入 note 的長度超過 2048，那透過 data sharing 傳到 caac 我們會截斷到 2048，然後會再傳回 maac 把他原本的 note 也截斷，但機率應該是極低，如果發生我們需要跟客戶解釋這樣 ([thread](https://chatbotgang.slack.com/archives/C04EDDSEV08/p1688538527648779?thread_ts=1688491590.242889\&cid=C04EDDSEV08)) |

Input | No validation required

|

Max 300 | Max 300 | |

| GA client id |

| | |

|

System data	No validation required	wont show on UI
Max 255 characters		
Arbitrary data	The fields is customized by each client The fields upper limit is 200 fields The number of characters in a single field must not exceed 50 characters (full-width and half-width characters are not distinguished).

Notes:

* Kept all original texts, links and query parameters intact.
* Empty/placeholder rows from the original export were omitted for clarity. If you want the full raw export preserved (including empty rows), tell me and I will include everything.

Selector

	A
1	Field type
2	input
3	date picker
4	time picker
5	badge
6	select
7	System data

Country (Region)

I can convert and optimize this content for GitBook, but before I proceed I need a quick clarification so I format it the way you want.

Which output format do you prefer?

1. A cleaned 3-column markdown table: Code | English name | Chinese name (one row per country).
   * This will keep only the core mapping and remove the extraneous empty cells and notes.
2. A grouped table that separates the APAC/target list (TW, EN, Thai, JP) and "Others" from the full ISO list (so the APAC subset is highlighted and the remaining countries are placed under "Others").
3. Keep the full original large table but cleaned of UI/navigation noise (i.e., preserving all columns and empty cells) — essentially a direct markdown reproduction.

Also: there are some rows with additional notes (rows 2–4 contain research notes and business goals). Do you want those included as separate text blocks above the table (kept verbatim) or omitted?

Tell me: which option (1/2/3) and whether to include the research/goal notes. I'll then produce the GitBook-optimized markdown (with stepper/tabs/hints if useful).

Other CDPs

	A	B	C	D	E	F	G
1	Salesforce	Insider	Emarsys	[All screenshot are collected here](https://docs.google.com/presentation/d/1U8pGrMfDx9JAJQlsH1apPsrt2nD6rszyRFScBg6zl9A/edit#slide=id.g1c266515d06_0_21)			
2		Name	basic info	Name	Basic info	Name	
3		member level		user id		Registeration status (Opt in)	
4		active		known user		Client type (Buyer)	
5	authentication	phone	reachiability	channels		member status (Loyalty member)	
6		email	basic info	phone		Star level	
7		address		email	AI	Likely to buy	
8		age		birthday		Prefereed channel	
9		employer		gender		Loyalty tier	
10	profile snapshot	customer since		address		Spent so far	
11		marital status	predictive segments	customer life cycle value	AI	Next cart value	
12		children		customer life cycle status	AI	Lifetime value	
13		client type		likelihood to purchase	Email resposes		
14		credit rating		likelihood to churn	AI	prefereed engage time (emeil)	

#			
15		profile completeness	discount affinity
		open count last month (email)	
16	responsible account	responsible agent	attribute affinity
		last opened campaign (email)	
17	needs & life stage	client segment	mobile ltp
		click count last month (email)	
18		journey stage	app push engagement
		last clicked campaign (email)	
19		prefered channels	interest cluster
		purchased count (email)	
20	customer service data	call center logs	RFM segment
How this contact compares to other contacts			
21		online chat logs	milestone	know date
		opened rate	
22		complaints & inquiries	first visit
		clicked rate	
23	online behavior	website	-
		purchased rate	
24		mobile app	last order
Product recommendations for this contact			
25	reaction to marketing campaigns	campaign	last visit
		Last web session	
26		revenue	total lifetime revenue
		time spent	
27			revenue in web
		last visited products	
28			revenue in mobile
		last visited categories	
29		orders	total orders
		Latest product recommendations	
30			total products purchased
AI		Affinity for new products	
31			average purchase value
AI		replenishable products (in 5 days)	
32		top 5 purchased categories	
Average purchase		order quantity	
33		product history	last visited product
		average order value	
34			last purchased product
Last purchase		Order quantity	
35			last abandoned product
		Order value	
36		last recommended products	
Most valuable purchase		Order quantity	
37		email metrics	total delivered
		Order value	
38			open rate

39				click rate	
40			webpush metrics	total delivered	
41				open rate	
42				click rate	
43			architect journey metrics	entered	
44				completed	
45				dropped	
46				exited	

Country_research

在臺外僑居留人數統計

<https://zh.wikipedia.org/zh-tw/%E5%9C%A8%E8%87%BA%E5%A4%96%E5%9C%8B%E4%BA%BA>

排名	國籍	2020 年	2015 年 \[2]	2010 年 \[3]	2000 年 \[3]	1990 年 \[4]	1980 年 \[4]	重複數	亞洲	美洲	歐洲
1	[印度尼西亞](https://zh.wikipedia.org/wiki/%E5%8D%B0%E5%BA%A6%E5%B0%BC%E8%A5%BF%E4%BA%9A)	253,570	220,688	144,651	83,519	1,413	981		[印度尼西亞](https://zh.wikipedia.org/wiki/%E5%8D%B0%E5%BA%A6%E5%B0%BC%E8%A5%BF%E4%BA%9A)	3	[日本](https://zh.wikipedia.org/wiki/%E6%97%A5%E6%9C%AC)
2	[越南](https://zh.wikipedia.org/wiki/%E8%B6%8A%E5%8D%97)	239,039	165,849	86,224	26,792	33	71		[越

南](https://zh.wikipedia.org/wiki/%E8%B6%8A%E5%8D%97) | 3 | [南韓](https://zh.wikipedia.org/wiki/%E5%A4%A7%E9%9F%A9%E6%B0%91%E5%9B%BD) |

| 3 | [菲律賓](https://zh.wikipedia.org/wiki/%E8%8F%B2%E5%BE%8B%E5%AE%BE) | 154,228 | 122,063 | 72,453 | 93,636 | 806 | 675 | | [菲律賓](https://zh.wikipedia.org/wiki/%E8%8F%B2%E5%BE%8B%E5%AE%BE) | 3 | [中華民國](https://zh.wikipedia.org/wiki/%E4%B8%AD%E8%8F%AF%E6%B0%91%E5%9C%8B) |

| 4 | [泰國](https://zh.wikipedia.org/wiki/%E6%B3%B0%E5%9B%BD) | 64,017 | 65,194 | 67,326 | 139,527 | 1,082 | 933 | | [泰國](https://zh.wikipedia.org/wiki/%E6%B3%B0%E5%9B%BD) | 2 | 中華人民共和國 |

| 5 | [馬來西亞](https://zh.wikipedia.org/wiki/%E9%A9%AC%E6%9D%A5%E8%A5%BF%E4%BA%9A) | 22,726 | 17,626 | 9,396 | 6,672 | 6,159 | 4,104 | | [馬來西亞](https://zh.wikipedia.org/wiki/%E9%A9%AC%E6%9D%A5%E8%A5%BF%E4%BA%9A) | 2 | [印度](https://zh.wikipedia.org/wiki/%E5%8D%B0%E5%BA%A6) |

| 6 | [日本](https://zh.wikipedia.org/wiki/%E6%97%A5%E6%9C%AC) | 15,914 | 12,728 | 9,101 | 9,939 | 6,616 | 5,328 | | [日本](https://zh.wikipedia.org/wiki/%E6%97%A5%E6%9C%AC) | 2 | [印度尼西亞](https://zh.wikipedia.org/wiki/%E5%8D%B0%E5%BA%A6%E5%B0%BC%E8%A5%BF%E4%BA%9A) |

| 7 | [美國](https://zh.wikipedia.org/wiki/%E7%BE%8E%E5%9C%8B) | 11,861 | 9,203 | 9,862 | 9,967 | 6,684 | 5,519 | | [美國](https://zh.wikipedia.org/wiki/%E7%BE%8E%E5%9C%8B) | 3 | [越南](https://zh.wikipedia.org/wiki/%E8%B6%8A%E5%8D%97) |

| 8 | [南韓](https://zh.wikipedia.org/wiki/%E5%A4%A7%E9%9F%A9%E6%B0%91%E5%9B%BD) | 5,029 | 3,840 | 3,265 | 2,890 | 1,587 | 886 | | [南

韓](https://zh.wikipedia.org/wiki/%E5%A4%A7%E9%9F%A9%E6%B0%91%E5%9B%BD)
| 2 | [菲律賓](https://zh.wikipedia.org/wiki/%E8%8F%B2%E5%BE%8B%E5%AE%BE)
|

| 9 | [印度](https://zh.wikipedia.org/wiki/%E5%8D%B0%E5%BA%A6) |
4,497 | 2,569 | 1,520 | 994 | 391 | 260 | | [印
度](https://zh.wikipedia.org/wiki/%E5%8D%B0%E5%BA%A6) | 3 | [泰
國](https://zh.wikipedia.org/wiki/%E6%B3%B0%E5%9B%BD) |

| 10 | [加拿大](https://zh.wikipedia.org/wiki/%E5%8A%A0%E6%8B%BF%E5%A4%A7)
| 2,568 | 2,068 | 2,304 | 1,855 | 343 | 304 | | [加拿
大](https://zh.wikipedia.org/wiki/%E5%8A%A0%E6%8B%BF%E5%A4%A7) | 1
| 新加坡 |

備註與相關連結

* [移民署統計在臺外僑居留人數統計表- 目前在臺(按國籍及區
域)](https://docs.google.com/spreadsheets/d/18OiucBX-
i7Twz1Uv5Q5N9XYOmaG8Qnb0/edit#gid=1570543822)
* 日本外國人情況為法務省入國管理局統計： <https://zh.wikipedia.org/zh-
tw/%E5%9C%A8%E6%97%A5%E6%9C%AC%E7%9A%84%E5%A4%96%E5%9C%8B%E
4%BA%BA>

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日本 在留外國人（來源：法務省入國管理局統計）

<https://zh.wikipedia.org/zh-
tw/%E5%9C%A8%E6%97%A5%E6%9C%AC%E7%9A%84%E5%A4%96%E5%9C%8B%E
4%BA%BA>

| 排名 | 出身國 | 2018 年 \[2] |
2015 年 \[3] | 2010 年 \[4] | 2000 年 \[5] | 1990 年 \[6] | 1980 年 \[7] |
| -: | -- | ---------: |
| ---------- | ---------- | ---------- | ---------- | ---------: |
| 1 | [中華人民共和
國](https://zh.wikipedia.org/wiki/%E4%B8%AD%E5%8D%8E%E4%BA%BA%E6%B0%91%

E5%85%B1%E5%92%8C%E5%9B%BD)	759,139	665,847	687,156	335,575	150,339	52,896
2	[南韓](https://zh.wikipedia.org/wiki/%E5%A4%A7%E9%9F%A9%E6%B0%91%E5%9B%BD)	450,663	457,772				
3	[越南](https://zh.wikipedia.org/wiki/%E8%B6%8A%E5%8D%97)	262,405	146,956	41,781	16,908	6,233	2,742
4	[菲律賓](https://zh.wikipedia.org/wiki/%E8%8F%B2%E5%BE%8B%E5%AE%BE)	260,553	229,595	210,181	144,871	49,092	5,547
5	[巴西](https://zh.wikipedia.org/wiki/%E5%B7%B4%E8%A5%BF)	191,362	173,437	230,552	254,394	56,429	1,492
6	[尼泊爾](https://zh.wikipedia.org/wiki/%E5%B0%BC%E6%B3%8A%E5%B0%94)	80,038	54,775	17,525	3,649		
7	[中華民國](https://zh.wikipedia.org/wiki/%E4%B8%AD%E8%8F%AF%E6%B0%91%E5%9C%8B)	56,724	48,723				
8	[美國](https://zh.wikipedia.org/wiki/%E7%BE%8E%E5%9C%8B)	55,713	52,271	50,667	44,856	38,364	22,401
9	[泰國](https://zh.wikipedia.org/wiki/%E6%B3%B0%E5%9B%BD)	50,179	45,379	41,279	29,289	6,724	1,276
10	[印度尼西亞](https://zh.wikipedia.org/wiki/%E5%8D%B0%E5%BA%A6%E5%B0%BC%E8%A5%BF%E4%BA%9A)	49,982	35,910	24,895	19,346	3,623	1,448
11	[秘魯](https://zh.wikipedia.org/wiki/%E7%A7%98%E9%AD%AF)	47,972	47,721	54,636	46,171	10,279	348
12	[印度](https://zh.wikipedia.org/wiki/%E5%8D%B0%E5%BA%A6)	31,689	26,244	22,497	10,064	3,107	1,944
13	[朝鮮](https://zh.wikipedia.org/wiki/%E6%9C%9D%E9%AE%AE_\(%E5%9C%B0%E5%8D%80\))	30,859	33,939	565,989	635,269	687,940	664,536

| 14 | [緬甸](https://zh.wikipedia.org/wiki/%E7%BC%85%E7%94%B8)

| 22,519 | 13,737 | 8,577 | 4,851 | 1,221 | 186 |

| 15 | [英國](https://zh.wikipedia.org/wiki/%E8%8B%B1%E5%9B%BD)

| 17,200 | 15,826 | 16,044 | 16,525 | 10,206 | 4,956 |

***

泰國的外國人情況統計數字

來源: <https://en.wikipedia.org/wiki/Demographics_of_Thailand>

排名	Nationality	Population	Percentage	中文名稱
1	[Myanmar](https://en.wikipedia.org/wiki/Myanmar)	1,292,686	50.08	緬甸
2	[Cambodia](https://en.wikipedia.org/wiki/Cambodia)	281,292	10.9	柬埔寨
3	[Laos](https://en.wikipedia.org/wiki/Laos)	222,432	8.62	寮國
4	[China](https://en.wikipedia.org/wiki/China)	141,553	5.48	中華人民共和國
5	[United Kingdom](https://en.wikipedia.org/wiki/United_Kingdom)	85,836	3.33	英國
6	[Japan](https://en.wikipedia.org/wiki/Japan)	80,898	3.13	日本
7	[India](https://en.wikipedia.org/wiki/India)	46,326	1.8	印度
8	[United States](https://en.wikipedia.org/wiki/United_States)	40,230	1.56	美國
9	[Netherlands](https://en.wikipedia.org/wiki/Netherlands)	25,000	1.34	荷蘭
10	[Germany](https://en.wikipedia.org/wiki/Germany)	24,383	0.94	德國
11	[France](https://en.wikipedia.org/wiki/France)	22,486	0.87	法國
12	[Vietnam](https://en.wikipedia.org/wiki/Vietnam)	17,662	0.68	越南

13	[Philippines](https://en.wikipedia.org/wiki/Philippines)	17,574	0.68	菲律賓
14	[Malaysia](https://en.wikipedia.org/wiki/Malaysia)	8,182	0.32	馬來西亞
15	[Singapore](https://en.wikipedia.org/wiki/Singapore)	2,952	0.11	新加坡
16	[Indonesia](https://en.wikipedia.org/wiki/Indonesia)	2,952	0.11	印度尼西亞
17	Others	174,236	6.75	其他
18	Stateless	117,315	4.54	無國籍
19	Unknown	2,147	0.08	未知

System Design

Profile unification

PRD & Design Links

* PRD: <https://docs.google.com/document/d/1mfj3p1ZMtFEacPB0L2WhSo5ieoHss2-JSoEJ1bZ6TsM/edit#heading=h.7z5imn1sorpi>
* Figma: <https://www.figma.com/file/k0XwP83RAV16nVdyFx7crb/Omnichannel-inbox?type=design\\&node-id=4765-42620\\&mode=design\\&t=jsndVG6TFALc1cog-0>

This project mainly involves 2 tasks:

{% stepper %}
{% step %}

Profile unification in CAAC

See "CAAC part" below for API details, web socket events, and the unification process.
{% endstep %}

{% step %}

Application page

See "Admin Center part" below for Admin Center APIs and CDH integration endpoints.
{% endstep %}
{% endstepper %}

***

API

CAAC part

New API

For unify key setting: The CRUD API for unify key setting follows the practice of CDH:
<https://www.notion.so/Unification-on-CDH-e437d717897c4fcf910df984cb5a84ee?pvs=21>

* Create org unify key setting (4hr)

  * URL: POST /api/v1/orgs/:org_id/organization/unify-scope-setting
  * Body example:

  ```json
  {
    "unify_keys": [
      {"attribute":"line_id","is_distinct":false},
      {"attribute":"custom_id","is_distinct":false}
    ]
  }
  ```
* Update org unify key (4hr)

  * URL: PUT /api/v1/orgs/:org_id/organization/unify-scope-setting/unify-keys
  * Body example:

  ```json
  {
    "unify_keys": ["display_mobile","custom_id"]
  }
  ```

  * Errors: CDH_ALREADY_CONNECTED
* Delete org unify key (4hr)? (TBD)
* Get Org Unify scope setting (4hr)

  * URL: GET /api/v1/orgs/:org_id/organization/unify-scope-setting
  * Response example:

  ```json
  {
    "unify_scope_id": 1,
    "is_cdh_connected": true,
    "orgs": [
  ```

```
    {"id":1, "source": "maac"},
    {"id":1, "source": "caac"}
  ],
  "unify_keys": ["display_email","external_member_id","display_mobile"]
 }
```

  * Note: "is_cdh_connected": true if len(orgs) > 1; "unify_keys" is \[] if no keys
* Get org merge state (4hr)

  * URL: GET /api/v1/orgs/:org_id/organization/unify-scope-setting/merge-state
  * Behavior: retrieve org merge state from cache; on cache miss → update; else → updating
  * Response example:

 ```json
 {
   "org_id": 1,
   "is_finished": true
 }
 ```

For profile usage:

* Ticket: <https://app.asana.com/0/1204010721938900/1206344489487084/f>
* Get unify profile (4hr) (endpoint/details TBD)
* Update contact unify key (4hr)
  * Use CDH API (referenced in Asana)
  * Endpoint: /api/v1/orgs/:org_id/chat/members/:member_id/uni
  * Request/response details: TBD
* Change channel entity unification (4hr)\
  Use case: when user knows a specific contact should be unified with another contact. Flow:

  1. Lookup unify_key for the org

  2. Modify the channel entity's all unify_key to NULL

  3. Modify the channel entity's all editable columns to NULL

  4. Modify the channel entity's `unify_key` to some value (e.g. {"unify_key":"mobile", "value":"0988..."})

  * URL: POST /api/v1/orgs/:org_id/chat/members/:member_id/change-unification
  * Request example:

 ```json
 {
   "unify_key": "display_email",
```

```
    "value": "kevin.tsai@cresclab.com.tw"
  }
```

* Cancel channel entity unification (4hr)\
  Cancel Unification flow:
  1. Lookup unify_key for the org
  2. Modify all unify_key of channel entity to be NULL
  3. (CDH is going to de-unify)
  * URL: POST /api/v1/orgs/:org_id/chat/members/:member_id/cancel-unification
* Get Member Unification

  * URL: GET /api/v1/orgs/:org_id/chat/members/:member_id/unification
  * Response example:

```json
{
  "member_id": 1,
  "unify_members": [
    {
      "source": "caac",
      "channel_id": 2,
      "channel_name": "unify channel 1",
      "type": "fb",
      "member_id": 2,
      "original_name": "member_original_name_2",
      "external_member_id": "U29893540562c1227b119f425d962f0ce",
      "last_message_at": "2024-01-31 12:25:27.743019+00"
    },
    {
      "source": "maac",
      "channel_id": null,
      "channel_name": null,
      "type": null,
      "member_id": 2,
      "original_name": null,
      "external_member_id": null,
      "last_message_at": null
    }
  ]
}
```

For unification process:

* Unification subscriber (8hr) — ticket:
<https://app.asana.com/0/1199607007611227/1206359985962905/f>

* Get channel entity merge state (4hr) — retrieve channel entity merge state in cache; if cache miss → update else → updating

For redirect to platform:

* Get jwt token

  * URL: POST /api/v1/platform/token
  * Request example:

  ```json
  {
    "org_id": 1
  }
  ```

  * Response example:

  ```json
  {
    "org_id": 1,
    "token": "jwt token"
  }
  ```

  * Note: token is a JWT for the platform; default expiry after 300s

Updated API

For profile usage:

* Partial update member profile (6hr)\
  Introduce logic:
  1. Check if updated attribute is a unify key or not
  2. If true: call CDH process (reference): <https://www.notion.so/cresclab/Unification-on-CDH-e437d717897c4fcf910df984cb5a84ee?pvs=4#828d303a5d034876af09dad3580c9ccf>

Web socket event

* Profile updated event (4hr)\
  Reference: <https://www.notion.so/Real-Time-Web-Notification-7643cb44c55249eea3c1b7f6b27bde7a?pvs=21\\>
  (+ PubSub subscription added)

***

Admin Center part

New API

For unify key setting: The CRUD API for unify key setting follow the practice of CDH:
<https://www.notion.so/Unification-on-CDH-e437d717897c4fcf910df984cb5a84ee?pvs=21>

* Get unify scope setting (6hr)

  * URL: GET /api/v1/applications/cdh/unify-scope-setting
  * Response example:

  ```json
  {
    "unify_scope_id": 17,
    "orgs": [
     {
       "id": 1,
       "source": "caac",
       "name": "org name",
       "uuid": "org uuid"
     }
    ],
    "unify_keys": [
     {"attribute": "connect_id","is_distinct": false},
     {"attribute": "custom_id","is_distinct": false}
    ],
    "is_cdh_connected": false,
    "distinct_key": null
  }
  ```
* Update org unify keys (6hr)

  * URL: PUT /api/v1/applications/cdh/unify-scope-setting/unify-keys
  * Body example:

  ```json
  {
    "unify_keys": ["display_mobile","custom_id"]
  }
  ```

  * Response example:

  ```json
  {
    "unify_scope_id": 17,
    "orgs": [
     {"id": 1, "source": "caac"}
  ```

```
  ],
  "unify_keys": [
    {"attribute": "connect_id","is_distinct": false},
    {"attribute": "custom_id","is_distinct": false}
  ],
  "is_cdh_connected": false,
  "distinct_key": null
}
```

* Update org unify key (6hr)?

  * URL: PUT /api/v1/orgs/:org_id/organization/unify-keys/:unify_key_id
  * Body example:

```json
{
  "unify_key_attribute": "display_email",
  "is_distinct": true
}
```

* Delete org unify key (6hr)? (TBD)
* Integrate CDH (6hr) — follow rules in ref: <https://www.notion.so/Unification-on-CDH-e437d717897c4fcf910df984cb5a84ee?pvs=21>

  * URL: POST /api/v1/applications/cdh/integrate
  * Body example:

```json
{
  "unify_keys": ["custom_id","display_mobile"]
}
```

  * Response example:

```json
{
  "unify_scope_id": 348,
  "orgs": [
    {"id": 11, "source": "caac", "name": null, "uuid": null},
    {"id": 1275, "source": "maac", "name": null, "uuid": null}
  ],
  "unify_keys": [
    {"attribute": "custom_id","is_distinct": false},
    {"attribute": "display_mobile","is_distinct": false}
  ],
  "is_cdh_connected": true,
  "distinct_key": null
```

}
  ```

* Disconnect CDH (6hr)
  * URL: POST /api/v1/applications/cdh/disconnect
  * Response: 204
* Unification subscriber (8hr) — ticket: <https://app.asana.com/0/1199607007611227/1206359985962905/f>
* Get org merge state (6hr)

  * URL: GET /api/v1/application/cdh/unify-scope-setting/merge-state
  * Response example:

  ```json
  {
    "unify_scope_id": 1,
    "is_finished": false
  }
  ```
* Get organizations

  * URL: GET /api/v1/application/cdh/organizations
  * Response example:

  ```json
  [
   {
     "id": 11,
     "source": "caac",
     "name": "Test[Sta]-CS-CrescendoLab",
     "uuid": "48919660-0d39-4714-a183-b042bfae1143"
   },
   {
     "id": 1275,
     "source": "maac",
     "name": "Test[St]-CS-TW",
     "uuid": "48919660-0d39-4714-a183-b042bfae1143"
   }
  ]
  ```

Related reference: <https://www.notion.so/d5092de991da4a0cb2b638a7920fbc50?pvs=21>

***

If you want, I can:

* Extract the endpoints into a machine-readable OpenAPI/Swagger draft.

* Produce example requests/responses for the TBD endpoints (Get unify profile, Update contact unify key) if you provide expected fields.

Unification on CDH

Goal and Requirement

1. Provide unification in Cross-product or Intra-product.
2. CDH, or Customer Data Hub, functions as both a database and a set of workers ingesting and broadcasting events from various applications (i.e., user updated maac member_id =123 email to be <qq@cresclab.com>).
3. Unification setting can be based on {unify_scope_id, unify_key} to achieve the different unification result — contact profile.

Terminology

Channel Entity

* A channel entity represents the smallest unit for member within our system. Each channel entity possesses its own unique external member identifier, such as Line_uid, mobile (SMS), Instagram_id, or Facebook_id.

Unify Key

* The unify key refers to designated attributes used to differentiate between individuals. In CrescendoLab, we have defined the following attributes as unify keys:
  * custom_id
  * display_mobile
  * display_email
  * line_uid
  * connect_id NEW

Contact Profile

* A contact profile is comprised of one or multiple channel entities that share the same unify key.
* For example, if an organization selects {connect_id} as the unify key, the profile combines the latest valid values from all channel entities who share same unify key.\
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UnifyScope

* The Unify Scope helps define which organizations' channel entities are subject to unification.

* Since the same clients company within CrescendoLab may own different Business Units (BUs) belonging to separate Crescendo Lab organizations, either in MAAC or CAAC, our goal is to unify channel entities across these different orgs.
  * what is scope: the range of a subject covered by some rules.
  * what is UnifyScope: images below show conceptual diagrams.\
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    ![Untitled](https://content.gitbook.com/content/GBP3mPdNeU7kBvG5sba7/blobs/lZOJZydyToGTz7gsMGZ4/Unknown%20image)\
    ![Untitled](https://content.gitbook.com/content/GBP3mPdNeU7kBvG5sba7/blobs/lZOJZydyToGTz7gsMGZ4/Unknown%20image)

Propose solution

1. Overview - Architecture

The unification is a streaming processor which processes the WALs from event stores.

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* We separate the event stores, event process, and event driven components. This helps to build robust boundaries.

Database

DB - tables

BQ

customer_member_wal

customer_member_wal
member_id
source
attribute
new_value
previous_value
source_timestamp
arrived_timestamp

* example

member_id	source	attribute	new_value	previous_value	source_timestamp	arrived_timestamp

| 123 | maac | display_name | TY | QQTY | 2024-10-01T00:00:00.00 |
2024-10-01T00:00:00.00 |
| 456 | caac | birthday | 1990-01-01 | 2020-01-01 | 2024-10-01T00:00:00.00 |
2024-10-01T00:00:00.00 |

PG

unify_scope_setting

unify_scope_setting
unify_scope_id
name
updated_at
created_at

* example

unify_scope_id	name	updated_at	created_at
1	HUBSPOT_PCHOME		
2	maac_2		

unify_key

unify_key
id
attribute
unify_scope_id
is_distinct

* note: is_distinct should ALWAYS be False
* example

id	attribute	unify_scope_id	is_distinct
1	line_id	1	False
1	display_email	1	False
1	display_mobile	1	False
1	connect_id	1	False
1	custom_id	1	False

org_unify_scope

org_unify_scope
org_id

| source |
| unify_scope_id |

* example

org_id	source	unify_scope_id
1	maac	1
2	caac	1

unification_graph (unification_graph_v2)

unification_graph_v2
member_id
source
unify_scope_id
unify_attribute
unify_key_value
composed_unify_key_value

* example

unify_key_value	unify_scope_id	member_id	source	unify_attribute	composed_unify_key_value
U4a17373204a10cb6370b6f1647e5db60	1	1	maac	line_id	U4a17373204a10cb6370b6f1647e5db60_1_line_id
0988888888	1	2	caac	display_mobile	0988888888_1_display_mobile

Business domain

* Channel Entity: the basic unit of member in MAAC/CAAC

name	type	description
source	str	Enum(maac, caac)
member_id	int	the member_id in its own source system

* Profile: A dict showing all attributes that belong to either contact or channel_entity. Example:

```json
{
  "note": "臣亮言：先帝創業未半而中道崩殂，",
```

  "bot_id": "98",
  "gender": "male",
  "health": "weak",
  "status": "active",
  "line_id": "Ua03e68f82280c2d3c0355b8927ed6a43",
  "birthday": "2022-01-19",
  "location": null,
  "org_uuid": "6e3329e0-38c2-4899-bafe-a85dfab71cdb",
  "custom_id": "customer_DavidChou",
  "channel_id": "1567460013",
  "created_at": "2022-06-24T18:32:06.009655Z",

  "display_name": "羽鵑",

  "last_engaged": "2022-11-14T10:51:10.808274Z",
  "display_email": "qq@email.com",
  "original_name": "David Chou",
  "display_mobile": "0911",
  "original_email": "test_maac@emial.com",
  "last_message_at": "2023-04-21T11:32:15.498047Z",
  "original_mobile": "+8863534134",
  "connect_id": null
}
```

* Unified Channel Entity
  * an array of the Channel Entities meaning the elements share the same unify_scope_id and unify_key. The length of the array could be 1 or more.
  * example:

```json
[
  { "source": "caac", "member_id": 512187 },
  { "source": "maac", "member_id": 2882101 },
  { "source": "caac", "member_id": 512044 },
  { "source": "caac", "member_id": 512175 },
  { "source": "maac", "member_id": 2881552 },
  { "source": "maac", "member_id": 2881553 }
]
```

3. Critical Workflow

Workers

We have several workers to handle different tasks:

* graph_maker (unify-member-and-update-profile)

* When any profile WAL is ingested, CDH upserts the entity's profile and updates the unification_graph.
* broadcast-member-update-worker
  * When any profile WAL is ingested by CDH, the worker will broadcast the attribute-based event to its unified channel entities.
* (unified_work)broadcast-contact-profile-with-unified-entity-worker
  * When any specified unify-key of profile WAL is ingested by CDH, the worker broadcasts the profile-based event to its unified channel entities; broadcasts tag events with inherited label and its unified channel entities; upserts the contact tag for each unified channel entity into the database.
* update-member-tag-worker
  * When tag WAL is ingested by CDH, the worker upserts the profile-tag table for its unified channel entities.

Jobs

* UnifyScopeSettingChange:
  * If unified orgs changes:
    * cdh-update-edges-unify-scope updates edges' unify_scope_id on table unification_graph_v2.
    * \[cloud run job] cdh-broadcast-contact-profile-under-scope broadcasts (publishes) all edges' contact profile under the unify_scope.
  * If unified orgs unchanged but unify_key changes:
    * cdh-broadcast-contact-profile-under-scope will broadcast all edges' contact profile under the unify_scope.
  * Otherwise do nothing.

API (influences subgraph)

* MoveSubgraph (deprecated): API that used to clear the entity's profile and changed its unify_key attributes. The new flow leaves broadcast-contact-profile-with-unified-entity-worker to handle subgraph changes.

Workflow Dependence

* The sequence below indicates worker dependencies (logical influence):
  * graph maker (v2)
  * unified_channel_entity
  * initial member/member update broadcaster (would combine the members into one)

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Graph Maker v2

Process attribute changes on channel entity to unification graph. (Blue line)

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Sequence:

```
Application ->> WALs: CUD on channel members of apps
WALs ->> Profile: [GraphMaker] upsert profile in CDH
WALs ->> Unification Graph: [GraphMaker] upsert any edge-changes involved custom_id, mobile, email, or line_id
```

Unified Channel Entity Profile Update Broadcaster

The broadcaster broadcasts events about new profile (Green line).

![Untitled](https://content.gitbook.com/content/GBP3mPdNeU7kBvG5sba7/blobs/lZOJZydyToGTz7gsMGZ4/Unknown%20image)

Sequence:

```
Application[CAAC MAAC] ->> CDH: fetch the change event
note right of Application[CAAC MAAC]: Show notification of merging
CDH ->> CDH: update unification
CDH ->> Queue: Send all unified members' profile
Application[CAAC MAAC] -->> Queue: pull events and overwrite profile
note right of Application[CAAC MAAC]: Show notification of merged
```

Change Unification Setting (Job)

Broadcaster of command-event:

* Setting: unify key
  * We provide the event-driven job that once we find any org whose unify_keys ({custom_id, connect_id, display_mobile, display_email}) are set, we send the member's unified profile for all involved channel entities.
  * Example message:

```json
{
  "topic": "unified_channel_entity.update",
  "profile": {
    "note": "",
    "bot_id": "47",
    "gender": "female",
    "health": null,
```

```
    "status": "active",
    "line_id": "Uecd1fe7455f1eca7300054bf24181a95",
    "birthday": "9999-12-31",
    "location": "",
    "org_uuid": "144529b5-249e-42aa-9bd7-0453ccb4177a",
    "custom_id": "",
    "channel_id": "1577288112",
    "created_at": "2022-06-17 05:57:05.495315+00",

    "display_name": "美惠(_;)",

    "last_engaged": null,
    "display_email": "",

    "original_name": "美惠(_;)",

    "display_mobile": null,
    "original_email": "",
    "last_message_at": "2022-06-17 04:42:13.148+00",
    "original_mobile": ""
  },
  "unified_channel_entities": [
    {"source": "caac", "member_id": 134982}
  ]
}
```

Sequence:

```
Apps ->> CDH: unify_scope change unify key
CDH ->> CDH: update unify_key
CDH ->> Cloud Run Job: trigger job
Cloud Run Job ->> CDH: re-unify the profile (under the unify_scope)
Cloud Run Job -->> Queue: Pull events
```

* Setting: unify scope
  * We provide an event-driven job that once we find any org updated its unify_scope_id, we send the member's unified profile for all channel entities under its unify_scope_id.

Sequence:

```
Application[CAAC MAAC platform] ->> CDH: update unify keys (applied)
note right of Application: Show notification of merging
CDH ->> CDH: update unify settings
CDH ->> Queue: Send all influenced unified members' profile
loop pull
Application[CAAC MAAC] -->> Queue: pull events and overwrite profile
end
```

```
```

Event-driven Job

* Goal: to re-unify or unify the orgs which just updated their unify setting ({unify_keys, unify_scope_id}).
* Job: updates all the channel entities under args — --unify_scope_id.
* The job sends event messages to the topic: staging-unified-channel-entity-profile-update-event.

Query flow

Sequence:

```
Application ->> API: Request a member profile
API ->> Unify_key: Fetch all Unify_key for the org which the member belongs
Unify_key -->> API: return the {"unify_key_attribute", "is_distinct"}
API ->> Unification: find all unified members based on `unify_key_attribute`
Unification -->> API: Return all unified members {"member_id","source"}
API ->> Profile: Fetch all profiles belongs to all unified members
Profile -->> API: Return the merged profile
API -->> Application: Return the merged profile
```

API spec

production: <https://cdh-production.internal.cresclab.com\\>
staging: <https://cdh-staging.internal.cresclab.com>

How to access token: gcloud auth print-identity-token

* In staging, you will need the ID token; we are considering using a simple token instead of the ID token and will notify ASAP if there is any change.
* In production, there is no authentication (production CDH service will only accept internal traffic within the same VPC).

Endpoints

* GET /member/{{source}}/{{member_id}}/unified_channel_entity
* GET member/{{source}}/unified_channel_entities?member_ids={{member_id_1}}\&member_ids={{member_id_2}}

Description

Retrieve all channel entities associated with multiple members from CDH.

Path parameters

* source (required): the member exists in {maac, caac}

Query parameters

* member_ids (required): the member_id(s) for the source

Request Headers

* Authorization: Bearer {token}

Responses

Example request:
member/maac/unified_channel_entities?member_ids=1\&member_ids=2

Success 200

```json
{
  "1": [
    { "source": "maac", "member_id": 1 },
    { "source": "caac", "member_id": 511767 },
    { "source": "caac", "member_id": 512316 }
  ],
  "2": [
    { "source": "maac", "member_id": 2 }
  ]
}
```

Fail 404

```json
{ "detail": "Not Found" }
```

* GET /member/{{source}}/{{member_id}}/contact_profile

Description

Retrieve unified profile from one channel entity's unified channel entities.

Path parameters

* memberId (required)
* source (required): one of {maac, caac}

Request Headers

* Authorization: Bearer {token}

Responses

Success 200

```json
{
  "note": "臣亮言：先帝創業未半而中道崩殂，",
  "bot_id": "98",
  "gender": "male",
  "health": "weak",
  "status": "active",
  "line_id": "Ua03e68f82280c2d3c0355b8927ed6a43",
  "birthday": "2022-01-19",
  "location": null,
  "org_uuid": "6e3329e0-38c2-4899-bafe-a85dfab71cdb",
  "custom_id": "customer_DavidChou",
  "channel_id": "1567460013",
  "created_at": "2022-06-24T18:32:06.009655Z",
  "display_name": "羽鶊",
  "last_engaged": "2022-11-14T10:51:10.808274Z",
  "display_email": "qq@email.com",
  "original_name": "David Chou",
  "display_mobile": "0911",
  "original_email": "test_maac@emial.com",
  "last_message_at": "2023-04-21T11:32:15.498047Z",
  "original_mobile": "+8863534134",
  "connect_id": null
}
```

Fail 404

```json
{ "detail": "Not Found" }
```

* PATCH /member/{{source}}/{{member_id}}/contact_profile

Description

Update unified profile from one channel entity's unified channel entities.

Path parameters

* memberId (required)
* source (required): one of {maac, caac}

Request Body

```json
{ "custom_id": "string" | null, "display_email": "string" | null, "display_mobile": "string" | null,
"connect_id": "string" | null }
```

Example: {"display_email": "<a@gmail.com>"}

Request Headers

* Authorization: Bearer {token}

Responses

Success 200

```json
{ /* merged profile, same as GET response example */ }
```

Fail 422

```json
{
  "detail": [
    { "loc": ["string",0], "msg": "string", "type": "string" }
  ]
}
```

* GET /unify_scope_setting/{{source}}/{{orgId}}

Description

Retrieve unify_scope_setting of a specific org. Use to tell whether the org is connected with
any other orgs.

Path parameters

* orgId (required)
* source (required): {maac, caac}

Request Headers

* Authorization: Bearer {token}

Responses

Success 200 example:

```json
{
  "unify_scope_id": 1,
  "orgs":[ {"id":1, "source": "maac"}, {"id":1, "source": "caac"} ],
  "unify_keys":[ {"attribute":"line_id","is_distinct":false},
{"attribute":"custom_id","is_distinct":false} ],
  "distinct_key": null
}
```

Fail 404

```json
{ "detail": "Not Found" }
```

* POST /unify_scope_setting/

Description

Create a brand new unify_scope for its unify_key. Use PATCH API to add orgs.

Request Body

```json
[
  {"attribute":"line_id","is_distinct":false},
  {"attribute":"custom_id","is_distinct":false}
]
```

Request Headers

* Authorization: Bearer {token}

Responses

Success 200 example:

```json
```

```json
{
  "unify_scope_id": 0,
  "orgs": [ { "id": 0, "source": "maac" } ],
  "unify_keys": [ { "attribute": "string", "is_distinct": true } ],
  "distinct_key": "string"
}
```

Fail 404

```json
{ "detail": "Not Found" }
```

* PUT /unify_scope_setting/{{unify_scope_id}}/unify_keys

Description

Update the unify_scope_id's unify_keys.

Request Body

Examples:

```json
{ "unify_keys": [ {"attribute":"line_id","is_distinct":false},
{"attribute":"custom_id","is_distinct":false} ] }
```

or

```json
{ "unify_keys": [ {"attribute":"custom_id","is_distinct":false},
{"attribute":"custom_id","is_distinct":false}, {"attribute":"display_mobile","is_distinct":false} ] }
```

Request Headers

* Authorization: Bearer {token}

Responses

Success 200 example:

```json
{
  "org_id":1,
  "source":"maac",
```

```
  "unify_scope_id": 1,
  "uniy_scope_name": "6e3329e0-38c2-4899-bafe-a85dfab71cdb",
  "unify_keys":["external_member_id"],
  "orgs":[ {"org_id":1, "source": "maac"}, {"org_id":1, "source": "caac"} ]
}
```

Fail 404

```json
{ "detail": "Not Found" }
```

* PATCH /unify_scope_setting/{{unify_scope_id}}/orgs

Description

Move orgs under unify_scope_id.

Request Body

```json
{ "orgs": [ {"source":"maac", "id":1}, {"source":"caac", "id":1} ] }
```

Request Headers

* Authorization: Bearer {token}

Responses

Success 200

```json
{
  "unify_scope_id": {{unify_scope_id}},
  "uniy_scope_name": "6e3329e0-38c2-4899-bafe-a85dfab71cdb",
  "orgs":[ {"org_id":1, "source": "maac"}, {"org_id":1, "source": "caac"} ]
}
```

Fail 404

```json
{ "detail": "Not Found" }
```

* GET /member/{{source}}/{{member_id}}/tags

Description

Retrieve a channel entity's tags which come from all its contacts. Tags are attached/removed when two channel entities are merged.

Path parameters

* memberId (required)
* source (required): {maac, caac}

Request Headers

* Authorization: Bearer {token}

Responses

Success 200 example:

```json
[
  { "tag_id": 14, "tag_name": "yeshahaha", "source": "caac", "is_attached": true,
"source_timestamp": "2023-11-29T06:07:50.563943+00:00" },
  { "tag_id": 4677, "tag_name": "測試測試", "source": "caac", "is_attached": true,
"source_timestamp": "2023-06-01T06:28:31.761926+00:00" },
  { "tag_id": 728085, "tag_name": "鵑鵑測試貼標", "source": "caac", "is_attached": true,
"source_timestamp": "2022-06-23T14:27:26.742680+00:00" }
]
```

Fail 404

```json
{ "detail": "Not Found" }
```

* POST /member/import/
  * Concurrency import task limit: 1. Clients can poll the task status API to check task status.

Sequence:

```

Client ->> CDH: send Import member request
CDH ->> DB-Task table: Check running and pending tasks with concurrency limit
CDH ->> DB-Task table: Create a pending task
CDH ->> GCS: Upload the import data
```

CDH ->> Client: return response with task id
Client ->> CDH: check task status
CDH ->> DB-Task table: return status
Worker ->> DB-Task table: update status to running
Worker ->> GCS: retrieve import data
Worker: do import in batch and update progress to db
Worker ->> DB-Task table: update status to complete
```

* GET /org

#### Description

Retrieve orgs

#### Query parameters

* org\_uuid (optional): the uuid of the org in MAAC or CAAC

#### Request Headers

* Authorization: Bearer {token}

#### Responses

Success 200 example:

```json
[
  { "id": 11, "source": "caac", "name": "Test[Sta]-CS-CrescendoLab", "uuid": "48919660-0d39-4714-a183-b042bfae1143" },
  { "id": 1275, "source": "maac", "name": "Test[St]-CS-TW", "uuid": "48919660-0d39-4714-a183-b042bfae1143" }
]
```

* POST /member/{source}/{member_id}/move_subgraph

Description

Special API for moving a channel entity to a specific contact profile (subgraph).

Request Body example

```json
{ "custom_id": "customer_Jin" }
```

Allowed keys: custom_id, connect_id, display_email, display_mobile

Request Headers

* Authorization: Bearer {token}

Responses

* Success 204
* Fail 404: { "detail": "Not Found" }
* Fail 400: { "detail": "Bad Request" }

Event Spec

Contact profile event — Decoded data format

Example payload:

```json
{
  "metadata": {
    "type": "unify_scope_setting_update",
    "unify_scope_id": 1,
    "orgs": [ { "id": 1, "source": "caac" } ],
    "is_last_batch": false
  },
  "events": [
    {
      "topic": "contact.update",
      "timestamp": "2024-02-20T17:40:32.774210+00:00",
      "profile": { /* profile object */ },
      "unified_channel_entities": [ { "source": "maac", "member_id": 2877075 } ],
      "unification_updated_at": "2020-03-31T15:14:26.577972+00:00"
    },
    { /* another event */ }
  ]
}
```

Tag Update Event

Example:

```json
{
  "metadata": { "type": "member_tag_update" },
  "events": [
    {
```

```
    "timestamp": "2024-04-13T10:43:23.947887+00:00",
    "topic": "member.tag.update",
    "unified_channel_entities": [
      { "member_id": 512249, "source": "caac" },
      { "member_id": 512253, "source": "caac" },
      { "member_id": 2882285, "source": "maac" },
      { "member_id": 2882280, "source": "maac" }
    ],
    "tags": [
      { "tag_id": 123, "source": "caac", "action": "add" },
      { "tag_id": 567, "source": "maac", "action": "add" },
      { "tag_id": 456, "source": "caac", "action": "delete" }
    ]
  }
 ]
}
```

* metadata is dynamic and optional. Examples:
  * If triggered by updating unification setting:

    ```json
    { "type": "unify_scope_setting_update", "unify_scope_id": 1, "orgs": [ { "id": 1, "source":
"caac" } ], "is_last_batch": false }
    ```

  * If triggered by importing:

    ```json
    { "type": "member_import" }
    ```

  * Channel entity's unification change:

    ```json
    { "type": "channel_entity_profile_update" }
    ```

  * Channel entity's tag update:

    ```json
    { "type": "channel_entity_tag_update" }
    ```

Security

* We will use JWT (RS256) instead of push auth of Pub/Sub.
  * RS256 decoding benchmark: \~2000–2500 RPS. Slower than HS256 but sufficiently fast
and avoids shared secret keys across systems.

Tasks

Product

All possible settings-tasks

{% stepper %}
{% step %}

Inter-caac setting: update unify_keys

* Endpoint: PUT unify_scope_setting/{{unify_scope_id}}/unify_keys
* Input: unify_keys
* Following job: broadcast (cdh-broadcast-contact-profile-under-scope)
  {% endstep %}

{% step %}

Enable CDH (connect two orgs with same org_uuid)

Steps:

1. POST unify_scope_setting/ — input: one org
2. GET /org — query_parameter: org_uuid
3. PATCH unify_scope_setting/{{unify_scope_id}}/orgs — input: orgs
4. PUT unify_scope_setting/{{unify_scope_id}}/unify_keys — input: unify_keys
5. Following job: broadcast
   {% endstep %}

{% step %}

After Enable CDH (operations)

* Update unify_keys (UI)
  * PUT unify_scope_setting/{{unify_scope_id}}/unify_keys — input: unify_keys
  * Following job: broadcast
* Disconnect (UI)
  * POST unify_scope_setting/
  * Create each org's unify_scope_setting respectively
  * PATCH unify_scope_setting/{{unify_scope_id}}/orgs
* Add more orgs under unify_scope_setting (ticket)
  * PATCH unify_scope_setting/{{unify_scope_id}}/orgs — input: orgs, unify_keys
    {% endstep %}
    {% endstepper %}

Application Page

* Support the unification setting UI.
* API to display unification setting:

* unify_scope_id
  * unify_key
* API to create/modify/delete unification settings:
  * unify_scope_id
  * unify_key

Profile Usage

* Update the attribute designated as unify_key for all unified channel entities.
* Cancel unification on a specific channel entity.
* Modify a channel entity to another unified contact.

Unification Process

* Leverage WALs to implement the unification graph.
* Broadcaster from profile unify key changes (note: apps only update editable profile fields).

Apps

* modify member.*update_unification_graph*:
  * Description: function updates/inserts unification edges when graph_maker runs.
  * sol1:
    * iterate WALs → if changed attribute ∈ {line_id, mobile, email, custom_id, connect_id} →

insert/update row on {member_id, source} with (uuid, unify_key_attribute, member_id,

source) using value of WAL and attribute.

    * Pros: no need to query existing edges; insert all WALs regardless of org's setting (saves effort when clients update settings).
    * Cons: need to backfill existing uuids in unification graph.
  * sol2:
    * iterate WALs → only insert/update when changed attribute belongs to org's unify_key

setting → insert/update row with hashed value.

    * Pros: minimizes unification graph volume.
    * Cons: when user changes unify_key, requires replay of WALs.
* repo.unification_graph.*get_unify_key_subgraphs_by_member_id*
  * Description: given a channel entity (e.g., {"member_id":123,"source":"maac"}), return a list of connected channel entities.
  * Approach:
    * fetch the unify_key setting for the org (list of unify keys & is_distinct flags).
    * fetch all unification_graph rows where unify_key_attribute ∈ that set.
    * traverse nodes and their connected nodes. For distinct-key cases, traverse within distinct key subgraphs.
* repo.profile.unified_member_profile
  * Based on nodes returned by fetch_unified_members:
    * ignore NULL values
    * take the most recent updated value

* add event_broker.unified_event (WIP)
* add a Cloud Run job to update unify_key attribute (WIP)
* unify_key value change cases:
  1. Change in one channel_entity (it may be removed from unified set)
     * CAAC receives the unify_key value change WAL (always present).
     * CAAC receives the profile WAL only when unify_key changed.
  2. All channel_entities change together → contact_profile level change

     * CAAC receives the profile WAL only when unify_key changed.

Test

* Regression test cases:
  * Single rules: line_id, display_mobile, display_email, custom_id
  * Composed rules: {line_id, display_mobile}, {line_id, display_mobile, display_email},
{line_id, display_mobile, display_email, custom_id}, {display_mobile, display_email,
custom_id}, {display_mobile, custom_id}
   * Example member records (A..J, H duplicates, etc.) — test merges, splits, null handling.

![Untitled](https://content.gitbook.com/content/GBP3mPdNeU7kBvG5sba7/blobs/lZOJZydyT
oGTz7gsMGZ4/Unknown%20image)

Q\&A

<details>

<summary>1. Update unify_key setting (How is this handled?)</summary>

Flow (sequence):

```
Application ->> API: Request CRUD a unify_key to one org.
API ->> Unify_key: Update all Unify_key.
Unify_key -->> API: return
API ->> Unification Graph: Fetch unified edges belonging to the updated
`unify_key_attribute`
Unification -->> API: Return all unified members {"member_id","source"}
API -->> Application: Return the unified members
```

Note: This is replaced by the Broadcaster: Change Unification Setting (Job). Instead of
returning only channel entities, the broadcaster returns all channel entities' profiles and
triggers events to re-broadcast under the affected unify_scope.

</details>

Additional worker / tag flow notes

* Direct Write Tag Worker flow vs Original Flow:
  * OriginalFlow:
    1. fetch all tag WALs (+ bq name)
    2. upsert_member_tags
    3. generate: a) broadcast event [not_inherited, inherited], b) contact_wal
    4. upsert contact tag
    5. broadcast events
  * DirectWriteFlow:
    1. fetch original-not-inherited tag
    2. upsert_member_tags
    3. generate: a) broadcast event [not_inherited, inherited], b) contact_wal
    4. upsert contact tag
    5. broadcast events
    6. upsert contact tag
    7. broadcast events
* API: POST member/{member_source}/tag/_bulk
  * Batch update member tags.
  * Request Body example:

    ```json
    [
      { "member_id": 1, "tag_id": 1, "tag_name": "Taiwan No.1", "tag_source": "maac", "is_attached": false },
      { "member_id": 1, "tag_id": 2, "tag_name": "QQ Tag", "tag_source": "maac", "is_attached": true }
    ]
    ```
  * Responses: Success 204
* WAL models (examples)
  * MemberTagWALWithName:
    * member_id: int
    * tag_id: int
    * is_deleted: bool
    * source: Source
    * source_timestamp: ISODatetime
    * tag_name: str
  * ContactTagWALWithName:
    * member_id: int
    * tag_id: int
    * member_source: Source
    * tag_source: Source
    * tag_name: str
    * is_deleted: bool
    * source_timestamp: ISODatetime
    * inherited: bool = False
* Upsert + Broadcast steps:
  1. fetch MemberTagWAL-like data
  2. build ContactTagWAL-like data

3. upsert + broadcast as above

(End of document)

Troubleshooting & FAQ

MAAC Contacts Troubleshooting Knowledge Base

Troubleshooting knowledge base for MAAC Contacts. Covers LINE OA, CDH sync, webhooks, API import, display names, tags, and contact metrics.

This is an internal troubleshooting knowledge base for **MAAC Contacts** (Audience → Contacts).

It consolidates real investigations from **Asana tickets**. It focuses on **LINE OA** contact sync, **CDH** profile updates, **webhook** payload issues, **Contact Import API** failures, and common UI/metrics misunderstandings.

{% hint style="info" %}
Search keywords (copy/paste)

MAAC Contacts, contact sync, CDH synchronization, LINE OA, webhook, API import, contact name synchronizing, display name, original name, UID binding, CID unification, customer_id, tag filter 400, contact import country code, last interaction, acquisition metrics zero
{% endhint %}

Common symptoms:

* Contact name stuck at **synchronizing**
* Contact display name inconsistent or unexpected
* Contact import/update via API fails
* Tag filter errors (e.g., **400 Bad Request**)
* Metrics show 0 or don't match expectations
* LINE friend status shows **Auth** instead of **Following**

Related docs:

* [Feature Description | MAAC Contact Import and Update – Crescendo Lab Help Center](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/audience/contacts/feature-overview/feature-description-maac-contact-import-and-update-crescendo-lab-help-center)

* [Feature Description | Contact Field Explanation and Matching Logic – Crescendo Lab Help Center](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/audience/contacts/feature-overview/feature-description-contact-field-explanation-and-matching-logic-crescendo-lab-help-center)
* [PRD — Contact Profile Unification (MAAC)](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/audience/contacts/product-specifications/prd-contact-profile-unification-maac)

***

MAAC Contacts - API import failure and contact name synchronizing (LINE OA token)

Metadata

* Feature: MAAC-Contact
* Created At: 2026-02-10
* Asana Task ID: [1213213099354367](https://app.asana.com/1/1184020052539844/task/1213213099354367)
* Ticket Priority: P4
* Client Name: \[REDACTED]
* Resolution Owner: Tracy
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

An official brand certified Official Account (OA) could not import contacts via the API. Contact names were not displayed and appeared as "synchronizing."

Context & Details

* Environment:
  * Channel Type: LINE
  * Affected contact ID: \[REDACTED_ID]
  * MAAC ID: \[REDACTED_ID]
  * Happened time: 2026/02/10
* The issue can be reproduced consistently. ProductOps can reproduce it in the client organization.
* Developer confirmed integration was correctly set up.
* Screenshots and screen records were provided.

Expected vs Actual

* Expected: Contacts import via API; names display correctly.
* Actual: API import failed; names shown as "synchronizing."

Root Cause & Solution

* Root Cause: The LINE API token used for integration had expired or become invalid, causing import failure.
* Solution:
  * Manually refreshed the LINE API token in the Django admin panel — this immediately resolved the import failure.
  * Suggested next steps: investigate LINE API token management to enable automatic refresh before expiration; implement monitoring/alerts for token validity to avoid manual intervention.

***

MAAC Contacts - Display name logic (display_name vs original_name, LINE channel entity)

Metadata

* Feature: MAAC-Contact
* Created At: 2026-02-04
* Asana Task ID: [1213072354903129](https://app.asana.com/1/1184020052539844/task/1213072354903129)
* Ticket Priority: P4
* Client Name: 新東陽

* Resolution Owner: Tracy
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

Client expected the "channel entity name" in the contact list to remain static (original channel name). Instead the display name appeared dynamic or different.

Context & Details

* Environment:
  * MAAC org ID: 6323
  * MAAC bot ID: 6331
  * Channel Type: LINE
* User expectation: Both the `display_name` and the original LINE user name should be visible simultaneously in MAAC/CAAC.
* When importing and overwriting `display_name` via the MAAC UI, both relevant data fields are overwritten.

Expected vs Actual

* Expected: Static display of the original channel name.

* Actual: Display name is dynamic and can differ from the original channel name.

Root Cause & Solution

* Root Cause: System design prioritizes `display_name` from the contact profile for both MAAC member and channel entity names. `original_name` from the channel is shown only if `display_name` is empty/not provided. This aligns with intended design.
* Solution: Clarified display logic to CSM team and client. No code changes required. Consider documentation/UI improvements to clarify prioritization.

Status: Resolved by clarification.

***

MAAC Contacts - Last interaction not updated (Rapid Fan Growth)

Metadata

* Feature: MAAC-Contact
* Created At: 2026-01-08
* Asana Task ID: [1212704522210445](https://app.asana.com/1/1184020052539844/task/1212704522210445)
* Ticket Priority: P4
* Client Name: BOARDRIDERS
* Resolution Owner: Tracy
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

"Last Interaction" time recorded as 2025-05-18, but a customer participating in Rapid Fan Growth and redeeming a prize on 2025-12-11 did not update the "Last Interaction" field.

Context & Details

* Environment:
  * MAAC org ID: 4650
  * MAAC bot ID: 3741
* Question: Why was the interaction not recorded in "Last Interaction"?

Reproduction Steps

{% stepper %}
{% step %}

Step

Customer participates in the Rapid Fan Growth game.

{% endstep %}

{% step %}

Step

Customer redeems a prize.
{% endstep %}
{% endstepper %}

Expected vs Actual

* Expected: "Last Interaction" should update to prize redemption date.
* Actual: "Last Interaction" remained unchanged.

Root Cause & Solution

* Root Cause: "Last Interaction" logs only direct interactions with MAAC platform features (e.g., sending messages or triggering auto-replies). Rapid Fan Growth actions are outside this definition.
* Solution: System functions as designed; no code changes required. Clarified the metric scope to stakeholders.

***

MAAC Contacts - UID binding issues and contact merge (CID as unification key)

Metadata

* Feature: MAAC-Contact
* Created At: 2026-01-08
* Asana Task ID: [1212704108191283](https://app.asana.com/1/1184020052539844/task/1212704108191283)
* Ticket Priority: P4
* Client Name: \[REDACTED]
* Resolution Owner: Tracy
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

Different UIDs were linked to a single contact account; modifying one UID affected the other. Need to separate accounts.

Context & Details

* Environment:
  * MAAC org ID: 6018

* MAAC bot ID: 5323

Reproduction Steps

{% stepper %}
{% step %}

Step

Two different UIDs are linked to a single contact account.
{% endstep %}

{% step %}

Step

Modify one UID and observe that changes affect the other UID.
{% endstep %}
{% endstepper %}

Expected vs Actual

* Expected: Each UID operates independently.
* Actual: Changes to one UID modify the other due to shared linkage.

Root Cause & Solution

* Root Cause: "CID as unification key" was enabled in CDH settings, causing merging of contacts sharing the same CID.
* Solution:
  * Assign a unique CID to one contact to separate them.
  * Disable "CID as unification key" in CDH to prevent unintended merges.

***

MAAC Contacts - Welcome message shows New Friend (LINE profile sync delay)

Metadata

* Feature: MAAC-Contact
* Created At: 2026-01-08
* Asana Task ID:
[1212703625992711](https://app.asana.com/1/1184020052539844/task/1212703625992711)
* Ticket Priority: P2
* Client Name: N/A
* Resolution Owner: Tracy
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

Welcome messages for new LINE contacts display "New Friend" instead of actual contact names.

Context & Details

* Environment:
  * MAAC org ID: 3786
  * Issue occurs with new LINE contacts.
* Reproduction Steps:
  * Add a new contact in LINE.
  * Observe the MAAC welcome message.

Expected vs Actual

* Expected: Welcome message includes actual contact name.
* Actual: Displays "New Friend."

Root Cause & Solution

* Root Cause: 0.5–1 second delay in CDH synchronization for LINE contact names. Welcome messages are sent before profile name data is available in MAAC.
* Solution:
  * CSMs should advise customers to temporarily remove the contact name field from new-friend welcome messages.
  * Engineering to optimize CDH synchronization so profile data is available prior to message sending (ongoing technical project).

***

MAAC Contacts - Tag filter error 400 Bad Request

Metadata

* Feature: MAAC-Contact
* Created At: 2025-12-26
* Asana Task ID:
[1212593890270662](https://app.asana.com/1/1184020052539844/task/1212593890270662)
* Ticket Priority: P4

* Client Name: Infineon 英飛凌

* Resolution Owner: Tracy
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

Client encountered an unexpected error when attempting to filter tags on the MAAC contact page.

Context & Details

* Environment:
  * MAAC org ID: 5266
  * MAAC bot ID: 4183
  * Client: Infineon TW (英飛凌台灣)
* Reproduction Steps: Issue could not be reproduced internally by Product Owners and CSMs.
* Observed: "400 Bad Request" error in browser console.

Expected vs Actual

* Expected: Successful filtering of contacts using tags.
* Actual: "400 Bad Request" error observed intermittently.

Root Cause & Solution

* Root Cause: Likely intermittent client-side issue (temporary network/caching) or timing problem where newly created tags not immediately available. "400" suggests malformed request or invalid input/state at that moment. Could not reproduce internally; systemic bug less likely.
* Solution:
  * Advise client to refresh the page, clear browser cookies, and retry.
  * If persistent, engineering should review MAAC and CDH audit logs around incident time for tag sync/filtering errors.

***

MAAC Contacts - Acquisition metrics show zero (real-time data)

Metadata

* Feature: MAAC-Contact
* Created At: 2025-12-25
* Asana Task ID: [1212585549859625](https://app.asana.com/1/1184020052539844/task/1212585549859625)
* Ticket Priority: P2
* Client Name: Zurquiz
* Resolution Owner: Tracy
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

Acquisition metrics for 2025-12-24 displayed as zero across multiple accounts despite expectations of non-zero values.

Context & Details

* Environment:
  * MAAC org ID: 5967
  * MAAC bot/channel ID: 5058
* Observations: Values expected to be real-time showed zero across accounts.

Reproduction Steps

* Access acquisition metrics for 2025-12-24 and observe displayed value.

Expected vs Actual

* Expected: Real-time acquisition numbers.
* Actual: Zero displayed.

Root Cause & Solution

* Root Cause: Undetermined. Issue appeared transient and self-resolved.
* Solution: No action taken. Recommend monitoring metrics for recurrence.

***

MAAC Contacts - Slow contact search with filters (background processing)

Metadata

* Feature: MAAC-Contact
* Created At: 2025-12-25
* Asana Task ID:
[1212584013956004](https://app.asana.com/1/1184020052539844/task/1212584013956004)
* Ticket Priority: P4
* Client Name: Insurverse
* Resolution Owner: Tracy
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

Slow loading and errors when searching contacts using filters, reproducible across accounts.

Context & Details

* Environment:

* MAAC org ID: 4811
* Users experience delays and errors when applying filters.

Reproduction Steps

* Apply filters to search contacts in MAAC and observe load time and errors.

Expected vs Actual

* Expected: Prompt loading without errors.
* Actual: Noticeable delay and occasional errors.

Root Cause & Solution

* Root Cause: Deeplink processing for updating contacts occurs in background and takes \~2–3 minutes; this is expected after system optimizations. No bugs identified.
* Solution: Monitor Contact List for significant delays. If persistent, open engineering evaluation. Currently closed with no action required.

***

MAAC Contacts - Blocked contacts count discrepancy (MAAC vs LINE CMS)

Metadata

* Feature: MAAC-Contact
* Created At: 2025-12-25
* Asana Task ID: [1212571876611200](https://app.asana.com/1/1184020052539844/task/1212571876611200)
* Ticket Priority: P2
* Client Name: Krungsri Simple
* Resolution Owner: Tracy
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

Discrepancy in blocked contacts trend between MAAC and LINE CMS over a month: MAAC increased; LINE CMS decreased.

Context & Details

* Environment:
  * MAAC org ID: 5505
  * MAAC bot/channel ID: 4421

Reproduction Steps

* Monitor blocked contacts count in MAAC and LINE CMS at month-end.

Expected vs Actual

* Expected: Consistent trends between MAAC and LINE CMS.
* Actual: Different trends observed.

Root Cause & Solution

* Root Cause: Different definitions of "blocked" contacts. MAAC includes users who passed authorization but did not add the Official Account along with truly blocked users; LINE CMS counts only truly blocked users.
* Solution: Clarify definitional differences to customer. Consider documentation or UI updates if confusion recurs.

***

MAAC Contacts - Contact count discrepancy in LINE Overview (report pipeline timing)

Metadata

* Feature: MAAC-Contact
* Created At: 2025-12-24
* Asana Task ID: [1212571876611185](https://app.asana.com/1/1184020052539844/task/1212571876611185)
* Ticket Priority: P2
* Client Name: Krungsri Simple
* Resolution Owner: Tracy
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

Mismatch between Total Contacts on LINE Overview (5,300,500) and sum of Contacts Engagement Level breakdown (5,302,274), discrepancy of 1,774.

Context & Details

* Environment:
  * MAAC org id / CAAC org id: 5505
  * MAAC bot / CAAC channel ID: 4421
* Attachments:
  * Screenshot 1: <https://app.asana.com/app/asana/-/get_asset?asset_id=1212571876611196>
  * Screenshot 2: <https://app.asana.com/app/asana/-/get_asset?asset_id=1212571876611198>

Reproduction Steps

* Compare Total Contacts on Overview with sum of engagement-level contacts.

Expected vs Actual

* Expected: Totals match.
* Actual: 1,774 discrepancy.

Root Cause & Solution

* Root Cause: Metrics derived from separate daily reports and distinct calculation pipelines executed at different times; different tracked data points. This is expected from current system design.
* Solution: No fix required. Consider future improvements to align metrics or improve user clarity. Status closed.

***

MAAC Contacts - Error when opening a contact (error ID investigation)

Metadata

* Feature: MAAC-Contact
* Created At: 2025-11-24
* Asana Task ID: [1212059548060044](https://app.asana.com/1/1184020052539844/task/1212059548060044)
* Ticket Priority: P2
* Client Name: \[REDACTED]
* Resolution Owner: Tracy
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

Customer encountered an error (Error ID: 21a2ea75120243f19261dafc33e7e74e) when clicking a contact. Customer Support could not reproduce the error.

Context & Details

* Browser updated; incognito tried; network devices changed.
* Potential causes include MAAC API connection failures, auth token issues, or malformed API responses.
* Internal adapter failing at harmony/internal/adapter/server/maac_server.go to retrieve contact data.

Reproduction Steps

* The error could not be reproduced by Customer Support.

Expected vs Actual

* Expected: Access contact information.
* Actual: Error prevented access.

Root Cause & Solution

* Root Cause: Possible MAAC API connection/auth/token/data format issues.
* Solution:
  * Engineering to investigate logs using the error ID.
  * Verify MAAC API service status and auth token validity.
  * Follow MAAC_CONTACT_LIST_ERROR_TROUBLESHOOTING.md guide.
  * CSM to reconfirm with customer if issue persists.

***

MAAC Contacts - International phone number import blocked (country code validation)

Metadata

* Feature: MAAC-Contact
* Created At: 2025-11-24
* Asana Task ID:
[1212056497282134](https://app.asana.com/1/1184020052539844/task/1212056497282134)
* Ticket Priority: P2
* Client Name: N/A
* Resolution Owner: Tracy
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

Failure importing international phone numbers: MAAC did not accept phone numbers with country codes different from the one selected during import.

Context & Details

* Users attempted to import mixed country-code phone numbers (e.g., Taiwan and Hong Kong) while selecting a single country code.

Reproduction Steps

{% stepper %}
{% step %}

Step

Attempt to import a list containing phone numbers with mixed country codes.
{% endstep %}

{% step %}

Step

Select one country code during the import process.
{% endstep %}

{% step %}

Step

Observe that numbers not matching the selected country code are blocked.
{% endstep %}
{% endstepper %}

Expected vs Actual

* Expected: System imports all provided phone numbers.
* Actual: System accepted only numbers matching the selected country code.

Root Cause & Solution

* Root Cause: Import function is designed to accept only phone numbers corresponding to the single selected country code (intended behavior for security/data integrity).
* Solution: Instruct customer to split contact lists by country code and run separate imports per list with correct country selection. No product changes necessary.

***

MAAC Contacts - Bulk tag add failure after tag removal (stale filter criteria)

Metadata

* Feature: MAAC-Contact
* Created At: 2025-11-12
* Asana Task ID: [1211918779487776](https://app.asana.com/1/1184020052539844/task/1211918779487776)
* Ticket Priority: P2
* Client Name: \[REDACTED]
* Resolution Owner: Jess
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

Operation to add a tag did not succeed (2025/11/07 \~18:37).

Context & Details

* Environment:
  * MAAC org ID: 5395
  * MAAC bot ID: 4303
* User actions:
  * Filter contacts by tag "Unknown Distributor".
  * Click update tag to remove it.
  * Click update tag to add it again.
* Result: Tag not added as of 11/11.

Reproduction Steps

* Filter contacts by "Unknown Distributor".
* Remove the tag from filtered contacts.
* Attempt to re-add the same tag to the same contacts.

Expected vs Actual

* Expected: Tag successfully added.
* Actual: Tag not added.

Root Cause & Solution

* Root Cause: User removed the tag then immediately attempted to re-add it. The system used outdated filter criteria (contacts having the tag) for the add operation, so no contacts matched after removal.
* Solution:
  * Engineering: Implement dynamic re-evaluation of bulk tag filters at execution time to reflect current contact state.
  * Product: Improve UI/UX to prevent or warn against self-conflicting tag operations.
  * CSM: Advise alternative workflows (use import, refresh filters before reapplying tags).

***

MAAC Contacts - Contact list shows same name repeatedly (pagination rendering)

Metadata

* Feature: MAAC-Contact
* Created At: 2025-11-10
* Asana Task ID:
[1211896250042306](https://app.asana.com/1/1184020052539844/task/1211896250042306)
* Ticket Priority: P2
* Client Name: MCJeans

* Resolution Owner: Jack Lee
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

When navigating MAAC audience > Contacts using search/filter, contact names displayed were consistently the same.

Context & Details

* Browser: Chrome
* MAAC org ID: 6364
* MAAC bot/CAAC channel ID: 6411
* Occurrence: 10 Nov 2025, 15:00

Reproduction Steps

1. Go to MAAC audience > Contacts.
2. Use search or filter to navigate contact list.
3. Observe that displayed contact names remain unchanged.

Expected vs Actual

* Expected: Each contact name corresponds to a distinct entry.
* Actual: Same contact name repeated.

Root Cause & Solution

* Root Cause: Front-end rendering problem due to transition from previous table display to new Pagination Table style.
* Solution: Deploy new Pagination Table style — issue resolved. CSM confirmed fix.

***

MAAC Contacts - LINE user ID not found in MAAC (webhook payload destination vs userId)

Metadata

* Feature: MAAC-Contact
* Created At: 2025-10-01
* Asana Task ID: [1211518421563981](https://app.asana.com/1/1184020052539844/task/1211518421563981)
* Ticket Priority: P2
* Client Name: \[REDACTED]
* Resolution Owner: Kade
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

LINE user ID U4af0276046c369865595c048d478828a not found in MAAC, preventing rich menu usage despite webhook sent to Cresclab returning 200.

Context & Details

* Environment:
  * MAAC org ID: 4478
  * MAAC bot: 3613
  * Happened on: 2025-09-30

Reproduction Steps

* Search for LINE user ID U4af0276046c369865595c048d478828a in MAAC.

Expected vs Actual

* Expected: LINE user ID searchable and rich menu usable.
* Actual: Not found in MAAC; rich menu access blocked.

Root Cause & Solution

* Root Cause: Client's webhook payload placed LINE user ID in 'destination' instead of 'userId' within the event object. Event Hub therefore failed to process/create the contact in MAAC.
* Solution:
  * Advise client to correct webhook payload per LINE Messaging API docs.
  * Or configure LINE Developer to send webhooks directly to Cresclab.
  * Manual correction in MAAC may be required for immediate resolution.

***

MAAC Contacts - LINE friend status shows Auth not Following (follow webhook missing)

Metadata

* Feature: MAAC-Contact
* Created At: 2025-09-10
* Asana Task ID: [1211314992828207](https://app.asana.com/1/1184020052539844/task/1211314992828207)
* Ticket Priority: P2
* Client Name: A RAMEN
* Resolution Owner: Tracy
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

A contact added as a friend in LINE OA is shown as 'Auth' in MAAC instead of 'Following', affecting coupon delivery in a campaign.

Context & Details

* Environment:
  * MAAC bot / CAAC channel ID: 4268

Reproduction Steps

* Add a contact as a friend in LINE OA and check MAAC status.

Expected vs Actual

* Expected: Status updates to 'Following'.
* Actual: Remains 'Auth' until contact sends a message.

Root Cause & Solution

* Root Cause: MAAC did not receive the initial LINE 'follow' webhook event. Status updated to 'Following' only upon receiving a subsequent 'message' event.
* Solution: Client should verify forwarding of LINE 'follow' events to our endpoint. If forwarded but not received, investigate webhook receiving logs. If not forwarded, client should fix forwarding.

***

MAAC Contacts - Unbinding issue: customer_id reappears after removal

Metadata

* Feature: MAAC-Contact
* Created At: 2025-09-02
* Asana Task ID:
[1211206950744508](https://app.asana.com/1/1184020052539844/task/1211206950744508)
* Ticket Priority: P2
* Client Name: 遠東商銀 HAPPY+

* Resolution Owner: N/A
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

After unbinding a LINE contact, the `customer_id` unexpectedly reappeared in MAAC shortly afterward.

Context & Details

* Occurrences:
  * 2025/5/13: Unbind at 14:15; `customer_id` reappeared at 14:16.
  * 2025/5/21: Unbind at 08:45; `customer_id` reappeared at 08:55.
* Affected user LINE UID and MAAC ID: \[REDACTED_ID]

Reproduction Steps

{% stepper %}
{% step %}

Step

Perform unbinding via the web interface.
{% endstep %}

{% step %}

Step

Observe `customer_id` reappearing in MAAC shortly after.
{% endstep %}
{% endstepper %}

Expected vs Actual

* Expected: `customer_id` permanently removed.
* Actual: `customer_id` reappears shortly after unbinding.

Root Cause & Solution

* Root Cause: Undetermined — unclear if system design or bug. Further investigation required.
* Solution: Engineering to investigate logs in MAAC and CDH for contact profile updates and unbinding events for this user.

***

MAAC Contacts - Unexpected customer_id update (bindlink callback TooManyRedirects)

Metadata

* Feature: MAAC-Contact
* Created At: 2025-08-28

* Asana Task ID: [1211168081754537](https://app.asana.com/1/1184020052539844/task/1211168081754537)
* Ticket Priority: P2
* Client Name: 遠東商銀 HAPPY+

* Resolution Owner: David
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

`customer_id` for a MAAC LINE contact was unexpectedly updated on 2025/08/13 14:30 despite client recording the user as unbound.

Context & Details

* Affected contact:
  * LINE Contact `line_uid`: U91c2b7e8520623a9c3137bec5a6f7110
  * `customer_id`: N2I4OWRINDM5NzdlNDFlZGEwZDE5YmQ0N2JmZjg0MDg=
* Timeline:
  1. 2025/8/13 14:22: API generated a bindlink.
  2. 2025/8/13 14:22: API updated data.
  3. 2025/8/13 14:27: API cleared `customer_id`.
  4. 2025/8/13 14:30: `customer_id` was stored (method uncertain).

Expected vs Actual

* Expected: `customer_id` remains cleared.
* Actual: `customer_id` was updated.

Root Cause & Solution

* Root Cause: Update was triggered by a bindlink callback within MAAC, but callback from MAAC to client failed with "TooManyRedirects" — likely misconfiguration in client's endpoint.
* Solution: Route client callbacks through Messaging Delivery System (MDS) for improved stability and observability. Solution tested and confirmed effective.

Status: Resolved

***

MAAC Contacts - Missing LINE UIDs in contact updates (webhook forwarding and API 404)

Metadata

* Feature: MAAC-Contact
* Created At: 2025-05-09

* Asana Task ID:
[1210198750130352](https://app.asana.com/1/1184020052539844/task/1210198750130352
)
* Ticket Priority: P1 - Very High
* Client Name: Krungsri Simple
* Resolution Owner: JY
* Result Breakdown: Clarify (Meet product expectation)

Issue Description

Four LINE UIDs missing from MAAC during a registration campaign using LIFF rich menu. MAAC API failed to update contacts for these UIDs though LINE API returns info for them.

Context & Details

* Environment:
  * MAAC bot / CAAC channel ID: 4421

Reproduction Steps

{% stepper %}
{% step %}

Step

Launch registration campaign using LIFF registration page in MAAC rich menu.
{% endstep %}

{% step %}

Step

Attempt to update contacts via MAAC API for specified UIDs.
{% endstep %}
{% endstepper %}

Expected vs Actual

* Expected: UIDs updated in MAAC.
* Actual: UIDs not found in MAAC; updates failed.

Root Cause & Solution

* Root Cause: Client's webhook forwarding unreliable, causing event loss. MAAC webhook response time occasionally >10s. Client import/update API calls may not reach MAAC successfully; MAAC update API returns 404 if contact absent.
* Solution:

* Client: Use Import Contact API for missing UIDs; implement webhook retry/extend forwarding timeout.
  * MAAC engineering: Investigate long response times and endpoint errors. Client to provide task_id and specific error logs for disappeared UIDs for deeper investigation.

Status: Client adopted Import Contact API and extended timeouts; investigation ongoing pending client data.

***

Segment

Feature Overview

System Design

Product Specifications

Troubleshooting & FAQ

segment_knowledge_base_final

Investigation of Data Insights Display Anomalies in Multi-Brand Segments

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2026-02-05
* **Asana Task ID:** [1213131750073052](https://app.asana.com/1/1184020052539844/task/1213131750073052)
* **Ticket Priority:** P0 - Emergency
* **Client Name:** 東森得易購股份有限公司-東森購物

* **Resolution Owner:** David
* **Result Breakdown:** Fix Problems

1. Issue Description

Multiple brands reported anomalies in Data Insights, specifically within the LINE overview, indicating abnormal data display.

2. Context & Details

* **Environment Conditions:**
  * Channel Types: LINE, Web, WhatsApp, EDM, FB, IG
  * Affected contact ID: \[REDACTED_ID]
  * MAAC ID: \[REDACTED_ID]
  * Issue reproducibility: Unclear if reproducible by ProductOps in client organization.
* **User Questions:**
  * Request for affected user and time information to assist ProductOps troubleshooting.
* **Reproduction Steps:**
  * Steps to reproduce the issue were not provided.
* **Expected vs Actual Behavior:**
  * Expected: Accurate data insights and segment calculations.
  * Actual: Significant drops in data insights and incorrect segment calculations.

3. Root Cause & Solution

* **Root Cause:**
  * Data errors occurred during the backfill of the `deleted_at` column, leading to missing members in segment calculations that rely on BigQuery.
* **Solution:**
  * The issue has been resolved, and product functionality has returned to normal. Clients are advised to resend any affected past or in-progress broadcasts. Scheduled broadcasts have been automatically updated. A list of affected clients will be compiled.

***

Investigation of Reduced Recipient Count in Scheduled Smart Sending

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2026-02-05
* **Asana Task ID:**
[1213115186501137](https://app.asana.com/1/1184020052539844/task/1213115186501137)
* **Ticket Priority:** P1 - Very High
* **Client Name:** \[REDACTED]
* **Resolution Owner:** David
* **Result Breakdown:** Fix Problems

1. Issue Description

The client reported a significant reduction in the number of recipients for a scheduled smart sending campaign. They requested verification of the actual number sent and the reason for this occurrence.

2. Context & Details

* **Environment Conditions:**
  * MAAC org id: 3363
  * MAAC bot/channel id: 2857
  * Channel Type: LINE
  * Affected contact id: \[REDACTED_ID]
  * MAAC ID: \[REDACTED_ID]
* **User Questions:**
  * What was the actual number of recipients sent?
  * What caused the reduction in recipient count?
* **Reproduction Steps:**
  * The issue was observed in a scheduled smart sending campaign.
  * The client noted discrepancies in the audience segmentation data.
* **Expected vs Actual Behavior:**
  * Expected: The scheduled campaign should reach the intended number of recipients.
  * Actual: The recipient count was significantly lower than expected.

3. Root Cause & Solution

* **Root Cause:**
  * A data backfill process introduced incorrect data, resulting in missing members from audience segmentation calculations. This led to inaccurate or reduced recipient counts for audience broadcasts.
* **Solution:**
  * MAAC's Data Insights and Audience Segmentation have been restored. It is recommended to resend already sent broadcasts and in-progress Smart Sending campaigns to ensure accurate targeting. Scheduled broadcasts will now utilize refreshed and accurate data.

Status: Resolved

***

Investigation of Contact Discrepancy in LINE Segment

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2026-02-05
* **Asana Task ID:** [1213084606836149](https://app.asana.com/1/1184020052539844/task/1213084606836149)
* **Ticket Priority:** P0 - Emergency
* **Client Name:** Muang Thai Life
* **Resolution Owner:** David
* **Result Breakdown:** Fix Problems

1. Issue Description

The total number of contacts displayed on the LINE overview page is less than the number shown on the contact page. A broadcast was sent to the same segment on 02/03, but the number of contacts in the segment has significantly decreased.

2. Context & Details

* **Environment:**
  * MAAC org ID: 4661
  * MAAC bot ID: 3717
  * Channel Type: LINE
  * Affected contact ID: \[REDACTED_ID]
  * Happened time: 02/05/2026
* **Reproduction Steps:**
  * The issue was observed when comparing the contact counts between the LINE overview page and the contact page.
  * A broadcast was sent to the same segment, resulting in a noticeable reduction in contact numbers.
* **Expected vs Actual Behavior:**
  * Expected: Consistent contact numbers across all pages and segments.
  * Actual: Discrepancy in contact numbers, with fewer contacts shown on the overview page.

3. Root Cause & Solution

* **Root Cause:** A data backfill process introduced incorrect data, leading to some members being excluded from audience segmentation calculations.
* **Solution:** The affected features have been restored, and audience data has been refreshed. It is recommended that customers resend past or ongoing campaigns to ensure accurate targeting.

***

Investigation of CID Field Data Discrepancy in Segment Export

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2026-02-02
* **Asana Task ID:** [1213076444939189](https://app.asana.com/1/1184020052539844/task/1213076444939189)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** David
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported that the CID field in the segment filter showed no data, yet the exported list included users with a CID value.

2. Context & Details

* **Environment Conditions:**
  * MAAC org id: 5178
  * MAAC bot/channel id: 4114
* **User Questions:**
  * Why is there a discrepancy between the segment filter and the exported list?
* **Reproduction Steps:**
  * Create a segment with the condition "unbound CID" excluding those not receiving marketing notifications.
  * Export the list and check for users with CID values.
* **Expected vs Actual Behavior:**
  * Expected: The segment should exclude users with CID values.
  * Actual: The exported list included users with CID values.

3. Root Cause & Solution

* **Root Cause:**
  * Users updated their CID status after the segment was calculated but before the broadcast message was sent. Additionally, a frontend UI bug caused inconsistent display of CID filter options.
* **Solution:**
  * The frontend UI bug for CID filter options has been fixed and deployed. The audience discrepancy due to the timing between segment calculation and user profile updates is an expected system behavior, which has been explained to the client.

***

How to Resolve the Inability to Select "Match Any Condition" in MAAC Segment

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2026-01-21
* **Asana Task ID:**
[1212890498554108](https://app.asana.com/1/1184020052539844/task/1212890498554108)
* **Ticket Priority:** P1 - Very High
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Jack Lee
* **Result Breakdown:** Fix Problems

1. Issue Description

The MAAC segmentation feature does not allow users to filter by "Match Any Condition." When attempting to click on "Match All Conditions," the screen becomes unresponsive.

2. Context & Details

* **Environment:** MAAC segmentation feature
* **User Actions:** Attempted to select "Match Any Condition" in the segmentation filter.
* **Reproduction Steps:**
  1. Navigate to the MAAC segmentation feature.
  2. Attempt to select "Match Any Condition."
  3. Observe the screen behavior when clicking "Match All Conditions."
* **Expected Behavior:** Users should be able to select "Match Any Condition" without the screen becoming unresponsive.
* **Actual Behavior:** The screen becomes unresponsive when attempting to select "Match All Conditions."

3. Root Cause & Solution

* **Root Cause:** A system bug was identified as the cause of the UI unresponsiveness when attempting to select "Match Any Condition."
* **Solution:** A fix was implemented and deployed to production, resolving the issue.

***

Investigation of Button Selection Failure in Segment Filtering

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2026-01-21
* **Asana Task ID:** [1212803690945957](https://app.asana.com/1/1184020052539844/task/1212803690945957)
* **Ticket Priority:** P3
* **Client Name:** allyoung
* **Resolution Owner:** Jack Lee
* **Result Breakdown:** Fix Problems

1. Issue Description

During segment filtering, the "Match Any/Match All" button could not be selected. The button was not visible to the customer and appeared in the top left corner for customer service but was still unselectable.

2. Context & Details

* **Environment Conditions:**
  * Channel Types: LINE, Web, WhatsApp, EDM, Facebook, Instagram

* Affected contact ID: \[REDACTED_ID]
  * Reproduction: Unclear if the issue can be consistently reproduced by the product owner in the client organization.
* **User Questions:**
  * Why is the button not visible or selectable?
* **Reproduction Steps:**
  * Attempt to use the "Match Any/Match All" button during segment filtering.
* **Expected vs Actual Behavior:**
  * Expected: The button should be visible and selectable.
  * Actual: The button is either not visible or not selectable.

3. Root Cause & Solution

* **Root Cause:**
  * A backend processing bug caused an intermittent failure in handling specific data entities, leading to the button's malfunction.
* **Solution:**
  * A patch was applied to correct the data/process for the affected instance. The engineering team will monitor for recurrence and may investigate a more robust, long-term solution if patterns emerge. The issue is currently resolved.

***

Investigation of Unexpected Segment Count Discrepancy

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2026-01-15
* **Asana Task ID:** [1212821275473949](https://app.asana.com/1/1184020052539844/task/1212821275473949)
* **Ticket Priority:** P3
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported that the number of contacts in the segment for "new friends" was not as expected. They anticipated that the segment tagged with "welcome message" would have more contacts than the segment for "new friends."

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 3169
  * MAAC bot/channel ID: 2720

* **User Actions:**
  * Attempted to filter new friends added after 1/6 by creation time.
  * Filtered users who triggered the welcome message by tag concentration greater than 1, including new friends and unblocked users.
* **Reproduction Steps:**
  1. Filter new friends added after 1/6.
  2. Filter users who triggered the welcome message.
* **Expected vs Actual Behavior:**
  * Expected: The segment tagged with "welcome message" should have more contacts than the "new friends" segment.
  * Actual: The "welcome message" segment had fewer contacts than expected.

3. Root Cause & Solution

* **Root Cause:**
  * The discrepancy was due to differences in segment update timing. The "welcome message" tag included both new contacts and unblocked users, which exceeded the client's expectation of only new friends.
* **Solution:**
  * Understand the numerical differences and clarify the client's precise definition of "new friend" to align MAAC segmentation with their business goals. Further action is pending clarification of customer requirements.

***

Investigation of Segment Update Failure in MAAC

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2026-01-13
* **Asana Task ID:** [1212760165483455](https://app.asana.com/1/1184020052539844/task/1212760165483455)
* **Ticket Priority:** P1 - Very High
* **Client Name:** ホテラバ
* **Resolution Owner:** JY
* **Result Breakdown:** Fix Problems

1. Issue Description

Attempts to update the segment multiple times on both the client side and internally resulted in the last updated date and time displaying as 2026-01-12 14:48. The MAAC UI status did not change to "Calculating" and remained as "Ready". Additionally, the exported CSV of the segment did not include users added on the same day, approximately 300 users.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 80
  * MAAC bot ID: 79
  * Feature ID: 1664
  * Segment name: 【1】14 日以内に友だち追加
  * Issue occurrence: 2026/01/12 14:50 to present
  * Reproducibility: Yes, on the client's MAAC UI. Testing on a Demo JP account showed expected behavior.
* **User Questions:**
  * Why does the segment not update with new users?
  * Why does the UI not reflect the "Calculating" status?
* **Reproduction Steps:**
  1. Attempt to update the segment on the client side.
  2. Observe the last updated timestamp and UI status.
  3. Export the segment CSV and verify the user list.
* **Expected vs Actual Behavior:**
  * **Expected:** The segment should update with new users, and the UI should display "Calculating".
  * **Actual:** The segment did not update with new users, and the UI remained "Ready".

3. Root Cause & Solution

* **Root Cause:** An interface error corrupted parameter calls for manual updates on segments containing exclusion conditions, preventing the API execution. The core segment calculation remained unaffected.
* **Solution:** A production fix has been deployed to correct the interface's parameter call mechanism for segment updates. Manual updates now function correctly.

***

Investigation of Segment Update Failure in MAAC System

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2026-01-13
* **Asana Task ID:** [1212739151110360](https://app.asana.com/1/1184020052539844/task/1212739151110360)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** JY
* **Result Breakdown:** Fix Problems

1. Issue Description

The segment labeled "Purchased This Month" has been stuck in the "calculating" state since last Friday after an update attempt, preventing completion.

2. Context & Details

* **Environment:**
  * Bot ID: 635
  * Org ID: 689
* **Segments Affected:**
  * "Purchased This Month" - [Segment Link](https://maac.cresclab.com/segments/edit/by-line-uid/74438)
  * "MOMO User" - [Segment Link](https://maac.cresclab.com/segments/edit/by-line-uid/75810)
* **Reproduction Steps:**
  1. Attempt to update an existing segment by re-uploading a LINE UID: \[REDACTED_ID]
  2. Observe that the segment remains in the "calculating" state.
* **Expected vs Actual Behavior:**
  * **Expected:** Segment should update and complete processing.
  * **Actual:** Segment remains in "calculating" state indefinitely.

3. Root Cause & Solution

* **Root Cause:**
  * The segment editing process was missing a critical internal parameter (import_key) during the file re-upload, which interrupted the update process.
* **Solution:**
  * Engineering has corrected the editing flow to ensure the required parameter is included during re-upload. The fix is now live, and no additional customer action is required. Segments should update normally moving forward.

***

Investigation of Identical Contact Numbers Across Different Segments

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2026-01-09
* **Asana Task ID:** [1212714239759016](https://app.asana.com/1/1184020052539844/task/1212714239759016)
* **Ticket Priority:** P2
* **Client Name:** Tiffanyandco
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client set up five segments with different MAAC tag conditions and observed that three segments had the same number of contacts, as did two others. This was contrary to expectations.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 5208
  * MAAC bot/channel ID: 4141
* **User Observations:**
  * Segments such as "Tiffany Knot," "Tiffany Lock," and others displayed identical contact counts.
* **Reproduction Steps:**
  * Set up segments with different MAAC tag conditions.
  * Check the contact numbers in each segment.
* **Expected vs Actual Behavior:**
  * **Expected:** Different segments should have varying contact numbers based on their specific tags.
  * **Actual:** Segments displayed identical contact numbers despite differing tag conditions.

3. Root Cause & Solution

* **Root Cause:**
  * The segments were configured using "any filter" (OR) logic with a set of broad tags (PM, PI, RM, Jewelry) that collectively covered all 16,977 contacts. The specific "Tiffany" tags were redundant, and the system functioned as designed.
* **Solution:**
  * Customer Support should explain the "any filter" (OR) logic to the client, clarifying that broad, overlapping OR conditions result in consistent segment sizes. It is advised to select only one tag for specific filtering needs.

***

Investigation of Smart Sending Suspension Request

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2026-01-02
* **Asana Task ID:** [1212617985199028](https://app.asana.com/1/1184020052539844/task/1212617985199028)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Gideon
* **Result Breakdown:** Task-Ticket

1. Issue Description

The client requested to pause or cancel the smart sending of a broadcast titled "20260102_BRAND_Has Your Skin Reached Its Peak Today?" due to an unverified error report.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 6394
  * MAAC bot/channel ID: 6468
* **User Questions:**
  * How to pause or cancel the ongoing smart sending?
* **Reproduction Steps:**
  * The client attempted to halt the broadcast based on an unverified error report.
* **Expected vs Actual Behavior:**
  * Expected: The broadcast continues as scheduled.
  * Actual: The broadcast was prematurely paused.

3. Root Cause & Solution

* **Root Cause:**
  * The broadcast was interrupted due to an unverified assumption by the client, which led to an unnecessary pause.
* **Solution:**
  * To resume the broadcast, disable the "message schedule check" and utilize MAAC's smart sending feature for missed batches.
  * Customers can identify sent contacts through MAAC's open tracking feature. Immediate contact list export is not feasible.
  * This procedure will be documented in the runbook for future reference.

The issue has been resolved following these actions.

***

Investigation of Zero Data in High Purchase Probability LINE Contacts Segment

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-12-22
* **Asana Task ID:** [1212543508010702](https://app.asana.com/1/1184020052539844/task/1212543508010702)
* **Ticket Priority:** P2
* **Client Name:** 台灣優衣庫有限公司-UNIQLO
* **Resolution Owner:** Aaren, David
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The segment for "Contacts with purchase history" and "High purchase probability within two weeks" in MAAC for Uniqlo is displaying zero contacts. This is unexpected as LINE Broadcast campaigns have recorded revenue data since September.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 1016
  * MAAC bot/channel ID: 884
* **User Questions:**
  * Why does the segment show zero contacts despite recorded revenue?
  * Is this behavior expected, and how can the data be displayed correctly?
* **Reproduction Steps:**
  * Uniqlo has been connected to GA for over four months.
  * LINE Broadcast messages have recorded order and revenue data since early September.
* **Expected vs Actual Behavior:**
  * **Expected:** The segment should display contacts with purchase history and high purchase probability.
  * **Actual:** The segment displays zero contacts.

3. Root Cause & Solution

* **Root Cause:**
  * Uniqlo's website redirect process drops the `utm_term` parameter, which includes the `lm:member_id` for individual contact tracking. This prevents MAAC from mapping purchase events to specific LINE contacts in the segmentation data.
* **Solution:**
  * Uniqlo must configure their website to preserve the `utm_term` parameter through all redirects. This is essential for accurate individual contact tracking, proper segmentation, and enabling future event-triggered marketing campaigns based on user behavior.

***

Investigation of "NaN" Display in Contact List Export

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-12-22
* **Asana Task ID:** [1212543257591550](https://app.asana.com/1/1184020052539844/task/1212543257591550)
* **Ticket Priority:** P4
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Jack Lee

* **Result Breakdown:** Fix Problems

1. Issue Description

Users observed that after creating a segment, the user interface displayed "NaN" for the number of phone contacts, despite the exported contact list containing phone numbers.

2. Context & Details

* **Environment Conditions:**
  * MAAC org id: 4538
  * MAAC bot/channel ID: 3645
  * Issue began on: December 19
* **User Questions:**
  * Why does the UI display "NaN" for phone contacts when the exported list contains phone numbers?
* **Reproduction Steps:**
  1. Create a segment in the MAAC system.
  2. Observe the UI displaying "NaN" for phone contacts.
  3. Export the contact list and verify the presence of phone numbers.
* **Expected vs Actual Behavior:**
  * **Expected:** The UI should display the correct number of phone contacts.
  * **Actual:** The UI displays "NaN" for phone contacts.

3. Root Cause & Solution

* **Root Cause:** An internal bug caused numeric values to be incorrectly displayed as "NaN" in the user interface.
* **Solution:** The bug causing the "NaN" display has been identified, fixed, and deployed to production.

***

Investigation of Segment Data Export Format Changes

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-12-17
* **Asana Task ID:** [1212465993341273](https://app.asana.com/1/1184020052539844/task/1212465993341273)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported an unexpected change in the export of contact lists from segments. Previously, both LINE contacts and phone contacts without LINE UIDs were exported together, requiring manual exclusion in Excel. Recently, only contacts with LINE UIDs are being exported.

2. Context & Details

* **Environment Conditions:**
  * The issue was observed in the segment "251217_Broadcast_SP+Product Recommendation."
  * The segment included 396,420 LINE contacts and 411,969 phone contacts.
  * The expectation was to export phone contacts without LINE UIDs, identified as "fake-xxxxx."
* **User Questions:**
  * Has there been a recent adjustment to the MAAC contact export functionality?
  * If adjustments were made, what are the scope and date of these changes?
* **Reproduction Steps:**
  * Export the contact list from the segment.
  * Compare the number of exported LINE contacts and phone contacts.
* **Expected vs Actual Behavior:**
  * **Expected:** Export includes both LINE contacts and phone contacts without LINE UIDs.
  * **Actual:** Export includes only contacts with LINE UIDs.

3. Root Cause & Solution

* **Root Cause:**
  * The segment "251217_Broadcast_SP+Product Recommendation" was defined without criteria to include phone contacts. Therefore, no "fake-xxxxx" contacts were present in the segment for export.
* **Solution:**
  * No bug was identified. To include phone contacts in the export, the segment's criteria must be updated to encompass them. It is advised to inform the customer about the importance of segment definition.

***

Investigation of AI Segment Displaying Zero Results

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-12-03
* **Asana Task ID:** [1212277836186691](https://app.asana.com/1/1184020052539844/task/1212277836186691)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]

* **Resolution Owner:** N/A
* **Result Breakdown:** Fix Problems

1. Issue Description

An AI Segment initially displayed a list of over 20,000 contacts but unexpectedly recalculated to show zero contacts the following day.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 23
  * MAAC bot/channel ID: 15
* **User Actions:**
  * The AI Segment was configured with a prompt targeting customers likely to open or click on product recommendation messages.
* **Reproduction Steps:**
  * The issue was set up on a Friday, initially showing over 20,000 contacts.
  * By the next day, the contact count recalculated to zero.
* **Expected vs Actual Behavior:**
  * Expected: The contact list should remain consistent unless manually altered.
  * Actual: The contact list unexpectedly recalculated to zero without user intervention.

3. Root Cause & Solution

* **Root Cause:**
  * The AI Segment dynamically selects its data sources. Currently, only the TAG_AND_COMMENT source is fully implemented. The system unexpectedly switched to an unimplemented source, ENGAGEMENT_HISTORY, resulting in zero contacts.
* **Solution:**
  * The data source for the affected AI Segment was temporarily fixed to TAG_AND_COMMENT. Further investigation is required to understand the unexpected data source selection changes. Implementing the remaining AI Segment data sources should be prioritized.

***

Investigation of GA Tracking Failure in MAAC EC-Features

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-12-03
* **Asana Task ID:** [1212252476377404](https://app.asana.com/1/1184020052539844/task/1212252476377404)
* **Ticket Priority:** P2
* **Client Name:** Test-Sunto Peerapol

* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The MAAC EC-Features were unable to track web behavior through GA integration, resulting in failure to function as expected. This issue was observed in two cases: page views were not tracked, and add-to-cart actions did not trigger the expected customer journey.

2. Context & Details

* **Environment:**
  * Client: Samitivej Chonburi
  * Domain: shop.samitivejchonburi.com
  * MAAC org id: 5600
* **Reproduction Steps:**
  * **Case 1: View Page Not Tracked**
    1. Click the homepage link in LINE: `https://maac.io/4XZ9C/hMrDp`.
    2. Navigate to `https://shop.samitivejchonburi.com/promotion-period-detail.html`./\[REDACTED_PATH]
    3. Create a segment to track contacts viewing the page.
    4. Result: Segment result is 0.
  * **Case 2: Add-to-Cart Not Tracked**
    1. Create a Customer Journey to track contacts adding products to the cart.
    2. Trigger by tag with a 3-day delay.
    3. Add tag to LINE contact to start the trigger.
    4. Click the homepage link in LINE: `https://maac.io/4XZ9C/hMrDp`.
    5. Navigate to `https://shop.samitivejchonburi.com/promotion-period-detail.html`/\[REDACTED_PATH] and add a product to the cart.
    6. Result after 3 days: No message sent.
* **Expected vs Actual Behavior:**
  * Expected: GA should track page views and add-to-cart actions, triggering segmentation and customer journeys.
  * Actual: No tracking data was captured, and customer journeys were not triggered.

3. Root Cause & Solution

* **Root Cause:**
  * The MAAC system's GA4 authorization account (\[REDACTED_EMAIL]) lacked proper permissions in the client's GA4 backend for the shop.samitivejchonburi.com domain. This prevented MAAC from retrieving necessary tracking data. Additionally, the client had internal GA4 data collection issues.
* **Solution:**
  * The client corrected their GA4 backend permissions for \[REDACTED_EMAIL] and resolved their internal GA4 data collection issues. MAAC's Django backend now confirms valid GA4 connections for the relevant domains. All MAAC e-commerce and tracking functions are expected to work. No further action is required from Engineering or Product.

***

Investigation of Audience Exclusion Limit Reached in MAAC-Segment

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-11-28
* **Asana Task ID:** [1212212478568915](https://app.asana.com/1/1184020052539844/task/1212212478568915)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client encountered an issue where certain audience segments could not be excluded due to a message indicating "Cannot select due to association limit reached." The client sought clarification on whether this was due to selecting too many audiences, thus reaching a limit.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 3363
  * MAAC bot: 2857
  * Feature ID: \[REDACTED_UUID]
* **User Questions:**
  * Why does the system indicate that the association limit has been reached when excluding certain audience segments?
  * Is this due to selecting too many audiences?
* **Reproduction Steps:**
  1. Attempt to set up audience segmentation.
  2. Select segments to exclude.
  3. Encounter error message indicating the association limit has been reached.
* **Expected vs Actual Behavior:**
  * **Expected:** Ability to exclude selected audience segments without error.
  * **Actual:** Error message received, preventing exclusion of certain segments.

3. Root Cause & Solution

* **Root Cause:**
  * There was a misunderstanding regarding the segment exclusion depth limit. The system's depth limit applies to sequential exclusion definitions (e.g., Segment A excludes B, and Segment B then excludes C), not to the complexity of the excluded segment's own conditions.

* **Solution:**
  * The exclusion depth limit logic was clarified to the Customer Success Manager (CSM).
  * Help center documentation for segment creation was updated to explain this mechanism clearly.
  * No engineering changes were necessary as the system operated according to design.

***

Investigation of Unexpected Segment Filtering Results

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-11-25
* **Asana Task ID:** [1212086489143431](https://app.asana.com/1/1184020052539844/task/1212086489143431)
* **Ticket Priority:** P2
* **Client Name:** 星巴克 Starbucks
* **Resolution Owner:** Jack Lee, George
* **Result Breakdown:** Fix Problems

1. Issue Description

The segment filtering results did not meet expectations. Specifically, the segment ID 251126 related to a customer broadcast activity was unavailable or displayed incomplete data, which prevented the execution of the customer broadcast.

2. Context & Details

* **Environment:**
  * MAAC organization ID: 3351
  * MAAC bot ID: 2850
* **User Actions:**
  * Attempted to filter contacts for a specific segment at 17:45, but no results were available by 18:43.
  * Results were finally available at 18:56.
* **Reproduction Steps:**
  * Filter contacts using the segment ID 251126.
  * Observe the delay in obtaining results.
* **Expected vs Actual Behavior:**
  * **Expected:** Immediate availability of filtered contact results.
  * **Actual:** Delayed availability, with results appearing over an hour later.
* **Additional Observations:**
  * Tag "是星禮程會員_電話配對" showed an unreasonable count of 3,559,662 contacts due to slow page loading.

3. Root Cause & Solution

* **Root Cause:**
  * The issue was due to delayed or incomplete data synchronization for the segment. This required manual intervention to supplement the data.
* **Solution:**
  * The segment's data was manually updated by the Customer Success Manager (CSM), resolving the immediate issue.
  * It is recommended that the engineering team investigate the cause of the data synchronization delay and determine why a manual refresh was necessary for the segment's availability.

***

Investigation of Unexpected Segment Calculation Results

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-11-25
* **Asana Task ID:** [1212084549273717](https://app.asana.com/1/1184020052539844/task/1212084549273717)
* **Ticket Priority:** P1 - Very High

* **Client Name:** FUJI 按摩椅

* **Resolution Owner:** George, Jack Lee
* **Result Breakdown:** Fix Problems

1. Issue Description

The client reported that the segment filtering did not meet expectations. Specifically, the segment calculation returned zero members despite the presence of tagged contacts.

2. Context & Details

* **Client Operations:**
  * Imported a batch of phone numbers and added the tag "005P025112501" to these numbers.
  * Attempted to filter the segment "005P South District Storage and Transport Department" using the tag "005P025112501".
  * The segment calculation resulted in zero members.
* **Environment:**
  * MAAC org ID: 5276
  * MAAC bot/channel ID: 4193
* **Reproduction Steps:**
  * Import phone numbers.

* Tag the numbers.
   * Filter the segment using the specified tag.
* **Expected vs Actual Behavior:**
   * Expected: Segment should include tagged contacts.
   * Actual: Segment calculation showed zero members.
* **Related Issues:** Similar issues were documented in other tasks.

3. Root Cause & Solution

* **Root Cause:**
   * The issue was related to the development of the WhatsApp Segment (WA Segment) feature. Adding reachability data triggered an existing system mechanism, resulting in incorrect segment calculation outcomes.
* **Solution:**
   * The engineering team reprocessed and supplemented the data. Most affected segment results have been restored. If issues persist, users are advised to manually click "Update Segment" in MAAC. If abnormalities continue after manual updates, further reporting is necessary.

***

Investigation of Unexpected MAAC Segment Count Discrepancy

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-11-25
* **Asana Task ID:** [1212084549273694](https://app.asana.com/1/1184020052539844/task/1212084549273694)
* **Ticket Priority:** P1 - Very High
* **Client Name:** imager 37
* **Resolution Owner:** George
* **Result Breakdown:** Fix Problems

1. Issue Description

The client reported that the MAAC segment displayed a count of 0 contacts, which was not expected. Previously, in November, the same filter conditions yielded a non-zero count.

2. Context & Details

* **Environment Conditions:**
   * MAAC org ID: 5540
   * MAAC bot/channel ID: 4457
   * Issue occurrence date: 11/25
   * Reproducibility: Yes
* **User Actions:**

* The client attempted to filter segments using specific conditions.
  * On the contacts page, the same conditions resulted in a non-zero count.
* **Expected vs Actual Behavior:**
  * **Expected:** The segment should display a count of contacts matching the filter conditions.
  * **Actual:** The segment displayed a count of 0 contacts.

3. Root Cause & Solution

* **Root Cause:**
  * During the development of the WhatsApp Segment (WA Segment) functionality, the addition of reachability data inadvertently triggered an existing system mechanism. This caused some segment calculations to erroneously result in zero contacts.
* **Solution:**
  * The engineering team re-processed the data and recalculated the affected segments.
  * For segments still showing zero, users should manually click "Update Segment" in the UI.
  * If the issue persists, users are advised to report the specific segment for further investigation.
* **Status:** Fixed.

***

Investigation of Inaccurate AI Segment Creation

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-11-20
* **Asana Task ID:** [1212000598445419](https://app.asana.com/1/1184020052539844/task/1212000598445419)
* **Ticket Priority:** P2
* **Client Name:** TelemedicineSCH
* **Resolution Owner:** Jack Lee
* **Result Breakdown:** Fix Problems

1. Issue Description

The AI segment created with the prompt for 'customers who are interested in \[Event Location]' included contacts without the relevant tag or any tags at all. The notes for these contacts did not mention the specified interest, indicating a lack of precision in AI segment generation.

2. Context & Details

* **Environment Conditions:**
  * MAAC org id / CAAC org id: 4956
  * Happened on: 12th Nov

* **User Questions:**
  * Why are contacts without the specified tag included in the segment?
  * How can the AI segment generation be made more accurate?
* **Reproduction Steps:**
  1. Create an AI segment with a prompt specifying interest in a particular event location.
  2. Export the segment and review the contacts included.
* **Expected vs Actual Behavior:**
  * **Expected:** Only contacts with the specified tag should be included.
  * **Actual:** Contacts without the specified tag or any tags were included.

3. Root Cause & Solution

* **Root Cause:**
  * The AI model adjustment on December 8 improved overall accuracy but failed to address the specific issue of segment generation for Org 4956, requiring further intervention.
* **Solution:**
  * Engineering conducted follow-up actions, successfully generating AI segments for Org 4956 with 100% accuracy. Future model adjustments should include verification of segment generation across all relevant organizations.

***

Investigation of AI Segmentation Failure in Broadcast

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-11-12
* **Asana Task ID:** [1211919837362932](https://app.asana.com/1/1184020052539844/task/1211919837362932)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Jack Lee
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The AI segmentation feature resulted in a segment with zero contacts when using the prompt "Message input 111", causing the broadcast to fail. The user expected the AI to identify relevant contacts.

2. Context & Details

* **Environment Conditions:**
  * Segment name: Audience_Double11_Waitlist
  * Segmentation method: AI Segmentation
  * Description: Message input 111

* **User Questions:**
  * Is the zero-contact result due to the prompt being unrelated to MAAC backend tags?
  * Is there a way to alert users if their prompt might not yield results?
* **Reproduction Steps:**
  * Create a segment using the prompt "Message input 111".
  * Attempt to broadcast to the segment.
* **Expected vs Actual Behavior:**
  * Expected: AI identifies relevant contacts based on the prompt.
  * Actual: No contacts identified, resulting in a failed broadcast.

3. Root Cause & Solution

* **Root Cause:**
  * The AI segmentation relies on MAAC tags and notes as data sources. The prompt "Message input 111" was too vague and did not match any existing tags or notes, resulting in zero identified contacts.
* **Solution:**
  * The core functionality is operating as designed, contingent on input clarity.
  * Suggested Actions:
    * Enhance UI/UX to guide users in crafting effective AI segmentation prompts.
    * Implement real-time feedback or warnings for ambiguous prompts.
    * Review the system's ability to initiate broadcasts with zero-contact segments.

***

Investigation of Limited Broadcast Reach in MAAC System

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-11-03
* **Asana Task ID:** [1211818294292311](https://app.asana.com/1/1184020052539844/task/1211818294292311)
* **Ticket Priority:** P2
* **Client Name:** BEIGY
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client initiated a broadcast on November 1st targeting all contacts, with an expected reach of 28,539 recipients. However, only 200 messages were successfully sent. The client requires an investigation into the cause of this discrepancy, especially given the urgency due to the ongoing promotional period.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 5830
  * MAAC bot IDs: 4724, 4762
* **User Questions:**
  * Why was the broadcast limited to 200 recipients instead of the expected 28,539?
* **Reproduction Steps:**
  * Initiate a broadcast to all contacts using the MAAC system.
* **Expected vs Actual Behavior:**
  * Expected: Broadcast reaches 28,539 contacts.
  * Actual: Broadcast reached only 200 contacts.

3. Root Cause & Solution

* **Root Cause:**
  * The client's LINE official account had reached its monthly message quota. This resulted in a 429 status code ("You have reached your monthly limit.") from the LINE API.
* **Solution:**
  * There is no issue with the MAAC system. The client is advised to either upgrade their LINE official account message plan or wait for the next billing cycle. Customer Success will communicate these options to the client.

***

Investigation of Discrepancy in MAAC Segment Import Counts

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-10-28
* **Asana Task ID:** [1209226325083447](https://app.asana.com/1/1184020052539844/task/1209226325083447)
* **Ticket Priority:** P2
* **Client Name:** MRM Japan/BOSS Japan
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The MAAC segment import process resulted in a significantly lower count of contacts (16,512) compared to the expected total (23,094) from the client's source file.

2. Context & Details

* **Environment Conditions:**
  * Expected LINE UIDs: 23,094 (all active, no blocks)
  * Segment result in MAAC: 16,512 (LINE following contacts)
  * Missing/unreflected UIDs: 6,582

* Impact: Segment planned for use in a campaign scheduled for October 29.
* **Reproduction Steps:**
  1. Download CSV template from MAAC segment creation screen.
  2. Paste LINE UIDs (total verified: 23,094).
  3. Upload CSV and run calculation.
  4. Resulting segment consistently shows fewer contacts.
* **Additional Notes:**
  * Issue persists even when creating multiple segments.
  * The same procedure worked correctly in the past two months (e.g., \~26,000-record imports).
  * A smaller test import today (185 records) processed successfully.
* **Client Request:**
  * Review import processing logs.
  * Identify root cause for the \~6.6k missing records.
  * Provide initial findings and any temporary workaround by end of day (Oct 28).

3. Root Cause & Solution

* **Root Cause:** The client's uploaded CSV file contained duplicate LINE UIDs. MAAC's segment creation process correctly filters and counts only unique UIDs.
* **Solution:** The product functionality is correct. Advise the client to provide CSV files with unique LINE UIDs for future imports.

The issue is resolved with the client required to take action by ensuring the uniqueness of UIDs in their CSV files.

***

How to Retrieve Historical Segmentation Conditions in MAAC

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-10-20
* **Asana Task ID:** [1211691171254904](https://app.asana.com/1/1184020052539844/task/1211691171254904)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** JY
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The MAAC broadcast report does not directly display the exact segmentation conditions used for a past broadcast, requiring manual investigation to retrieve.

2. Context & Details

* **Broadcast Details:**
  * Broadcast ID: 250926_40629_90doff
  * Report URL: [MAAC Broadcast Report](https://maac.cresclab.com/broadcast/line/report/407756)
* **Segmentation Conditions:**
  * Criteria: Users with no interaction for 90 days within the past year
  * API Reference: \[REDACTED_PATH]
* **Client Information:**
  * MAAC org ID: 479
  * MAAC bot/channel ID: 460
* **Occurrence Date:** 2025-10-20
* **Reproduction:** Not specified

3. Root Cause & Solution

Root Cause: MAAC's user interface lacks a direct audit trail or snapshot of segmentation criteria linked to past broadcasts. The segmentation definitions can be dynamic, making historical lookups difficult.

Solution: ProductOps manually retrieved the specific segmentation conditions (last interaction between 2024-06-24 and 2025-06-24). It is suggested to enhance MAAC broadcast reports to include a snapshot of segmentation criteria used at the time of the broadcast. Implementing version control or audit logs for segmentation definitions is recommended.

***

Investigation of AI Segment Results Discrepancy in Insurverse Campaign

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-10-15
* **Asana Task ID:** [1211648131247953](https://app.asana.com/1/1184020052539844/task/1211648131247953)
* **Ticket Priority:** P2
* **Client Name:** Insurverse
* **Resolution Owner:** Ray
* **Result Breakdown:** Fix Problems

1. Issue Description

The AI Segment feature did not return expected results when filtering contacts based on specific campaign interactions. Specifically, contacts who interacted with both "1 free 1" campaigns and "live TikTok" were not accurately captured.

2. Context & Details

* **Environment:** Insurverse organization (ID: 4811)
* **Testing Scenarios:**
  * **Test 1:** Filtered contacts who clicked "1 free 1" campaigns resulted in 510 contacts.
  * **Test 2:** Filtered contacts who clicked both "1 free 1" campaigns and "live TikTok" resulted in 0 contacts.
* **Observation:** Despite several contacts having both tags, the AI failed to capture them in Test 2.
* **Tag Structure Issue:** Tags related to TikTok are scattered across different campaigns, complicating manual selection.
* **Expected Behavior:** The AI Segment should automatically identify and filter contacts with any TikTok-related tags without manual selection.
* **Actual Behavior:** The AI did not capture all relevant contacts as expected.

3. Root Cause & Solution

* **Root Cause:** The current system design of the CDH has a known limitation in real-time synchronization of specific behavioral tags between MAAC and CAAC. The synchronization operates on a periodic schedule rather than real-time, affecting immediate data availability for messaging actions.
* **Solution:** The issue is closed as per current product capabilities. This limitation is documented and will be considered in future CDH enhancements. For urgent messaging needs, customers should be informed about the synchronization delay for these specific tags.

***

Inquiry on Data Update Frequency for MAAC Segments

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-09-12
* **Asana Task ID:** [1211339238787010](https://app.asana.com/1/1184020052539844/task/1211339238787010)
* **Ticket Priority:** P2
* **Client Name:** 台灣優衣庫有限公司-UNIQLO（2025）
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The customer reported that the MAAC segments for "purchased LINE contacts" and "high purchase probability LINE contacts" are showing zero members. This issue persists despite

the integration of Google Analytics (GA) and UTM parameters, and the display of revenue in push notifications.

2. Context & Details

* **Environment Conditions:**
  * The customer began using the system and integrated GA on 8/25.
  * GA and UTM parameters are connected, and push notifications are displaying revenue data.
* **User Questions:**
  * The customer inquired about the typical time required for data to appear in segments, as they are planning their strategy.
* **Reproduction Steps:**
  * Integration of GA and UTM parameters.
  * Observation of segment data through "分眾" for LINE contacts.
* **Expected vs Actual Behavior:**
  * **Expected:** Segments should display the number of "purchased LINE contacts" and "high purchase probability LINE contacts."
  * **Actual:** Both segments show zero members.

3. Root Cause & Solution

* **Root Cause:**
  * The issue is attributed to insufficient data volume and processing time in Google Analytics. The calculation for segments such as "high purchase probability" requires specific GA data conditions:
    * Inclusion of "add to cart" or "checkout revenue" metrics.
    * Data for at least 14 days.
    * A minimum of 1,000 unique records.
  * Since the customer started using the system on 8/25, these conditions were not yet met. Additionally, GA4 has inherent data delays, often requiring up to 30 days for data to fully accumulate and stabilize for such calculations.
* **Solution and Suggested Actions:**
  * The customer has been advised to wait for sufficient data to accumulate and meet the necessary conditions for accurate segment calculations.

***

Investigation of Anomalous Segment Count in MAAC-Segment

Metadata

* **Feature:** MAAC-Segment
* **Created At:** 2025-09-08
* **Asana Task ID:**
[1211285615645748](https://app.asana.com/1/1184020052539844/task/1211285615645748)

* **Ticket Priority:** P2
* **Client Name:** 主富服裝股份有限公司- NET
* **Resolution Owner:** Leo
* **Result Breakdown:** Fix Problems

1. Issue Description

The contact count for segments L4 and L5 for client NET suddenly dropped to zero. Additionally, there is a discrepancy of 232 contacts between the total active contacts (626,772) and the sum of L1-L3 and L4-L5 segments (626,540).

2. Context & Details

* **Client Information:**
  * Organization ID: 225
  * Channel ID: 204
* **Feature Information:**
  * Segment Feature ID: 112469 & 112470
  * Date of Occurrence: 2025/9/8
  * Reproducibility: Yes
* **Data Discrepancy:**
  * Total active contacts: 626,772
  * Sum of L1-L3 and L4-L5 segments: 626,540
* **User Questions:**
  * Why did the L4 & L5 segment counts drop to zero?
  * Why is there a discrepancy in the total contact count?
* **Expected vs Actual Behavior:**
  * Expected: Consistent segment counts and alignment with total active contacts.
  * Actual: Sudden drop in L4 & L5 counts and a discrepancy in total contact numbers.

3. Root Cause & Solution

* **Root Cause:**
  * The issue appears to be related to a data integrity or calculation error within the MAAC segmentation feature, affecting the L4 and L5 segment counts.
* **Solution:**
  * Conduct an engineering investigation to identify and resolve the cause of the incorrect segment counts and the overall contact discrepancy. This may involve reviewing the data processing logic and ensuring accurate calculations within the segmentation feature.

***

Investigation of Upload Failure in MAAC-Segment

Metadata

* **Feature:** MAAC-Segment

* **Created At:** 2025-05-26
* **Asana Task ID:**
[1210376434573383](https://app.asana.com/1/1184020052539844/task/1210376434573383
)
* **Ticket Priority:** P2
* **Client Name:** 酷澎
* **Resolution Owner:** JY
* **Result Breakdown:** Limit information

1. Issue Description

The customer reported an unexpected error when attempting to upload LINE UIDs. A 403
Forbidden error was observed in the browser console during the upload process, particularly
when handling large volumes exceeding 10,000 records.

2. Context & Details

* **Environment Conditions:**
  * MAAC bot ID: 4869
  * Occurrence Date: 2025-05-26
  * Reproducibility: The issue could not be reproduced internally.
* **User Questions:**
  * The customer inquired about the cause of the 403 error and potential solutions.
* **Reproduction Steps:**
  * Attempt to upload a large volume of LINE UIDs.
  * Observe the browser console for any errors.
* **Expected vs Actual Behavior:**
  * **Expected:** Successful upload of LINE UIDs without errors.
  * **Actual:** Encountered a 403 Forbidden error in the browser console.

3. Root Cause & Solution

* **Root Cause:**
  * The root cause remains undetermined. Internal testing with similar large files (199k
records) on the client's bot was successful, and no corresponding 403 errors were found in
MAAC's system logs. This suggests the issue may be related to the client's browser,
network, or local environment restrictions.
* **Solution:**
  * A workaround was provided by assisting the customer with data export/import.
  * The issue could not be reproduced internally.
  * If the issue reoccurs, the customer is advised to provide the detailed response body from
the browser's network tab for the 403 error to aid in further diagnosis.
* **Status:** Closed. Workaround provided, issue not reproducible.

Presales & Market Insights

Tag Manager

Feature Overview

System Design

Product Specifications

Troubleshooting & FAQ

tag_knowledge_base_final

Why Does the Tag Order Change on the Dashboard When Adjusting Items Per Page?

Metadata

* **Feature:** MAAC-Tag
* **Created At:** 2026-01-21
* **Asana Task ID:** [1212896141155033](https://app.asana.com/1/1184020052539844/task/1212896141155033)
* **Ticket Priority:** P3
* **Client Name:** Gucci Thailand
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The ordering of tags on the Tag Manager Dashboard changes unexpectedly when the "items per page" filter is adjusted. Initially, tags are displayed from the highest to lowest number of tagged contacts. However, altering the items per page results in a different first tag being shown.

2. Context & Details

* **Environment Conditions:**
  * MAAC org id / CAAC org id: 4710
  * MAAC bot / CAAC channel ID: 3759
* **User Questions:**
  * What is the expected behavior for tag ordering when changing the items per page?
  * How can this behavior be explained to clients?
* **Reproduction Steps:**

1. Access the Tag Manager Dashboard.
2. Observe the initial tag order based on the number of tagged contacts.
3. Change the "items per page" filter.
4. Note the change in the first tag displayed.
* **Expected vs Actual Behavior:**
  * **Expected:** Tags should consistently display from highest to lowest number of tagged contacts, regardless of the items per page setting.
  * **Actual:** The order of tags changes when the items per page filter is adjusted.

3. Root Cause & Solution

* **Root Cause:** The backend system paginates tags based on their creation time and then sorts only the tags on the current page by member_count. This post-pagination sorting leads to perceived order changes when the page size is altered.
* **Solution:** Adjust the sorting logic to apply the member_count ordering globally before pagination. This ensures a consistent sort order across all pages, regardless of the page size.

***

How to Resolve Corrupted Tag Names in the MAAC Interface

Metadata

* **Feature:** MAAC-Tag
* **Created At:** 2026-01-12
* **Asana Task ID:** [1212742355247023](https://app.asana.com/1/1184020052539844/task/1212742355247023)
* **Ticket Priority:** P3
* **Client Name:** Insurverse
* **Resolution Owner:** Noel
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The tag names in the MAAC interface have become corrupted and are displaying as unreadable characters. This issue affects all users, preventing them from viewing or managing the tags, which disrupts workflow and communication within the MAAC.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 4811
  * Issue affects all users within the organization.
* **Reproduction Steps:**
  * Import CSV files containing Thai characters into the MAAC system.
* **Expected vs Actual Behavior:**

* **Expected:** Tag names should display correctly in the MAAC interface.
  * **Actual:** Tag names appear as garbled characters, such as "??"????"??_update08122025".

3. Root Cause & Solution

Root Cause: The issue arises from importing CSV files containing Thai characters using an incompatible encoding. The MAAC system reads files using UTF-8 encoding, which cannot decode Thai characters correctly, resulting in them being replaced with '?'.

Solution:

* Instruct customers to save and import CSV files with UTF-8 encoding to prevent future occurrences.
* The existing garbled tags are separate entities and do not affect pre-existing correct tags or their historical data.
* Customers can delete the garbled tags and re-import them after ensuring the CSV file uses the correct UTF-8 encoding.

***

Investigation of Contact Tag Order in MAAC Interface

Metadata

* **Feature:** MAAC-Tag
* **Created At:** 2025-12-19
* **Asana Task ID:** [1212526242255975](https://app.asana.com/1/1184020052539844/task/1212526242255975)
* **Ticket Priority:** P3
* **Client Name:** \[REDACTED]
* **Resolution Owner:** David
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The customer inquired whether the tags on a contact are displayed in the order they were applied.

2. Context & Details

* **Environment Conditions:**
  * MAAC org id / CAAC org id: 3169
  * MAAC bot / CAAC channel ID: 2720
* **User Questions:**
  * Are contact tags displayed in the order they were applied?
* **Reproduction Steps:**

* Access the MAAC interface.
  * Observe the order of tags on a contact.
* **Expected vs Actual Behavior:**
  * **Expected:** Tags should be sorted by acquisition time, newest first.
  * **Actual:** Tags are sorted by their initial application time, newest first.

3. Root Cause & Solution

* **Root Cause:**
  * The MAAC interface correctly sorts tags by their initial application time, from newest to oldest. The discrepancy reported by the customer was due to an incomplete dataset in their Metabase, which lacked one tag record. This is not a system issue.
* **Solution:**
  * No bug was found in the MAAC system. The UI behavior is correct. It is necessary to clarify to the customer that the MAAC tag sorting logic is based on the initial application time, sorted from newest to oldest. The system functions as designed.

***

How to Address Long Loading Times When Deleting Tags

Metadata

* **Feature:** MAAC-Tag
* **Created At:** 2025-12-11
* **Asana Task ID:**
[1212388613440442](https://app.asana.com/1/1184020052539844/task/1212388613440442)
* **Ticket Priority:** P2
* **Client Name:** 全家便利商店股份有限公司-全家 FamilyMart

* **Resolution Owner:** Leo
* **Result Breakdown:** Task-Ticket

1. Issue Description

The client reported that the process of deleting tags takes an excessively long time. They requested assistance in deleting certain tags that are deemed unnecessary.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 998
  * MAAC bot/CAAC channel ID: 869
* **User Questions:**
  * Can assistance be provided to expedite the tag deletion process?
* **Reproduction Steps:**
  * Attempt to delete tags within the MAAC system.

* Observe prolonged loading times during the deletion process.
* **Expected vs Actual Behavior:**
  * Expected: Tags should be deleted promptly.
  * Actual: Tags take a long time to delete, causing delays.

3. Root Cause & Solution

* **Root Cause:**
  * The issue was identified as a system design problem where the CDH direct write was temporarily disabled during the initial tag deletion in MAAC. This prevented the deletion from syncing to CDH, resulting in tags not being fully removed.
* **Solution:**
  * The remaining tags were manually deleted from CDH. Documentation has been provided (CDH Polyrhythmic Wiki) to enable comprehensive, end-to-end tag deletion by the requesting team for future operations. The issue has been resolved.

***

Investigation of Tagging Failure After Clicking Broadcast Message Card

Metadata

* **Feature:** MAAC-Tag
* **Created At:** 2025-12-05
* **Asana Task ID:** [1212314620645881](https://app.asana.com/1/1184020052539844/task/1212314620645881)
* **Ticket Priority:** P2
* **Client Name:** 新莊典華

* **Resolution Owner:** Jalex
* **Result Breakdown:** Fix Problems

1. Issue Description

Some users did not receive the expected tags after clicking on broadcast message cards, which prevented them from entering the automated journey to receive messages.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 4434
  * CAAC channel ID: 3574
  * Issue occurred on: 12/5/2025
  * Reproducibility: Yes
* **User Actions:**
  * User Dash clicked the third card but did not receive a tag.
  * User Anina clicked the second card but did not receive a tag.

* User Dash clicked the first card and received a tag.
* **Expected vs Actual Behavior:**
  * Expected: Users should receive tags upon clicking any broadcast message card.
  * Actual: Tags were not applied consistently, leading to failure in triggering the automated journey.
* **Reproduction Steps:**
  1. User clicks on a broadcast message card.
  2. System should apply the corresponding tag.
  3. User should enter the automated journey.
* **Additional Information:**
  * Journey Report: [Link](https://maac.cresclab.com/journey/report/57262)
  * Broadcast Report: [Link](https://maac.cresclab.com/broadcast/line/report/456739)

3. Root Cause & Solution

* **Root Cause:**
  * A synchronization delay existed between the creation/modification of "message_editor" settings and their associated tag data in the system.
* **Solution:**
  * A fix (PR #10224) has been deployed to production. This ensures immediate synchronization of "message_editor" keyword settings and correct tag application.
* **Status:**
  * Fixed and verified.

***

How to Batch Delete Unused Tags in MAAC for Salesforce Data Cleanup

Metadata

* **Feature:** MAAC-Tag
* **Created At:** 2025-11-14
* **Asana Task ID:** [1211943713823266](https://app.asana.com/1/1184020052539844/task/1211943713823266)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Leo
* **Result Breakdown:** Task-Ticket

1. Issue Description

The client requires the deletion of unused tags in MAAC to facilitate data cleanup in Salesforce. The deletion must occur in MAAC before it can be executed in Salesforce. This process currently requires engineering intervention.

2. Context & Details

* The client is performing data cleanup in Salesforce and needs to remove unused tags.
* Tags must first be deleted in MAAC to allow subsequent deletion in Salesforce.
* The task requires engineering support as the current system does not support direct user execution.
* A list of tags to be deleted is provided in a Google Spreadsheet. Only tags marked in column D are to be deleted.
* The deadline for completion is set for November 20th, end of business day.
* Relevant identifiers:
  * MAAC Org ID: 4478
  * Bot ID: 3613
  * UUID: \[REDACTED]

3. Root Cause & Solution

Root Cause:\
The CDH system does not automatically synchronize tag deletions initiated in MAAC, necessitating manual intervention to maintain data consistency across systems.

Solution:

* Manually delete 1064 tags from both MAAC and CDH (including PG DB and BQ commit table).
* Implement future automation to synchronize tag deletions from MAAC to CDH to prevent manual dependencies.

***

Investigation of Tag Discrepancy Between MAAC and Emarsys

Metadata

* **Feature:** MAAC-Tag
* **Created At:** 2025-11-07
* **Asana Task ID:** [1211876667612502](https://app.asana.com/1/1184020052539844/task/1211876667612502)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported a discrepancy between the number of users associated with a specific MAAC tag in the MAAC backend and the count retrieved by Emarsys from BigQuery. The client seeks to understand the cause of this mismatch.

2. Context & Details

* **Environment:**
  * MAAC org ID: 3775
  * MAAC bot/channel ID: 3153
* **Tag Information:**
  * MAAC Tag Name: 優惠_免運活動
  * Tag ID: 694708
* **Reproduction Steps:**
  * Compare user count for the tag in MAAC backend with the count retrieved by Emarsys from BigQuery.
* **Expected vs Actual Behavior:**
  * Expected: User counts should match.
  * Actual: Discrepancy in user counts between MAAC backend and Emarsys's BigQuery results.

3. Root Cause & Solution

* **Root Cause:**
  * The discrepancy arises because Emarsys's query includes a time-based filter, whereas MAAC's tag count reflects all contacts with the tag, regardless of time (including both followed and unfollowed contacts).
* **Solution:**
  * The MAAC tag count logic is functioning as designed, providing aggregate counts without time filtering. No changes are required on the MAAC side.
  * Emarsys should be informed that MAAC tag counts are aggregate and not time-filtered. If Emarsys requires matching counts, they should adjust their query to remove the time-based filter.

***

Investigation of Irregular Tag Synchronization from CAAC to MAAC

Metadata

* **Feature:** MAAC-Tag
* **Created At:** 2025-10-31
* **Asana Task ID:** [1211802724129394](https://app.asana.com/1/1184020052539844/task/1211802724129394)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

Tags applied manually in CAAC are inconsistently synchronized to MAAC, where they are attributed as originating from MAAC instead of CDH. This inconsistency affects contact segmentation data.

2. Context & Details

* **Environment Conditions:**
  * MAAC enabled: Yes
  * CAAC organization ID: 2101
  * MAAC organization ID: 4433
  * Two-factor authentication enabled: Yes
* **User Questions:**
  * Why are some tags not synchronizing correctly from CAAC to MAAC?
  * Why are tags being attributed to MAAC instead of CDH?
* **Reproduction Steps:**
  1. Apply tags manually in CAAC.
  2. Observe the synchronization behavior in MAAC.
* **Expected vs Actual Behavior:**
  * **Expected:** Tags applied in CAAC should synchronize to MAAC with CDH as the source.
  * **Actual:** Tags appear in MAAC with MAAC as the source, not all tags are synchronized, and synchronization is inconsistent.
* **Affected Tags:**
  * a 喜_追蹤
  * a 喜_已約
  * a 喜_保留
  * a 喜_已訂
  * a 喜_已到流失
  * a 喜_未到流失

3. Root Cause & Solution

* **Root Cause:**
  * The manual replication of CAAC tag applications in the MAAC UI is due to a perceived lack of automatic synchronization from CAAC to MAAC via CDH. There may be a misunderstanding regarding the intended cross-platform tag management.
* **Solution:**
  * The Customer Success Manager (CSM) will verify the reasons and workflow for the manual tag application in MAAC.
  * Engineering will investigate the intended functionality of CDH in automatically syncing tags from CAAC to MAAC, ensuring correct source attribution if applicable.
* **Status:** Under investigation.

***

Investigation of Tag Reappearance in MAAC System

Metadata

* **Feature:** MAAC-Tag
* **Created At:** 2025-10-17
* **Asana Task ID:** [1211669157227422](https://app.asana.com/1/1184020052539844/task/1211669157227422)
* **Ticket Priority:** P2
* **Client Name:** 全家便利商店股份有限公司-全家 FamilyMart
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported that after deleting the tag "康康 5" on 2025-10-08, it reappeared in the tag list. The client confirmed the deletion was completed but noticed the tag again on a later date.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 998
  * MAAC bot/channel ID: 869
  * Issue occurrence: From 2025-10-08 onwards
* **User Questions:**
  * Is the tag reappearing due to manual re-creation by the client, or is the deletion process incomplete?
  * How can messages be located using the campaign ID for future troubleshooting?
* **Reproduction Steps:**
  * The issue could not be reproduced. After deleting the tag and re-entering the auto-reply, the tag did not reappear.
* **Expected vs Actual Behavior:**
  * Expected: Once a tag is deleted, it should not reappear unless manually recreated.
  * Actual: The tag "康康 5" reappeared in the list despite being deleted.

3. Root Cause & Solution

* **Root Cause:**
  * System Design: Deleting a tag does not deactivate existing actions (e.g., from old campaigns, pushes, or rich menu links) configured to apply that specific tag ID. When a user interacts with such content, the system re-creates the deleted tag rather than ignoring the action.
* **Solution:**

* The "康康 5" tag was last deleted on 2025-10-29. To prevent future re-creation, the client must identify and update any active old campaigns, pushes, or rich menu links that are configured to apply this tag.
* **Status:** Resolved

***

Investigation of Discrepancy in Tag List and Deep Link Data

Metadata

* **Feature:** MAAC-Tag
* **Created At:** 2025-10-13
* **Asana Task ID:** [1211622605919662](https://app.asana.com/1/1184020052539844/task/1211622605919662)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Limit information

1. Issue Description

The client reported a discrepancy between the user count for a specific tag in the tag list and the count attributed to a specific deep link. The client believed the tag was only applied through this deep link, but the numbers did not match.

2. Context & Details

* **Environment Conditions:**
  * Tag: Project | Philips Coffee Machine
  * Deep Link ID: 995058
* **User Questions:**
  * Why is there a discrepancy in the user count between the tag list and the deep link data?
* **Reproduction Steps:**
  * Review the tag application history using the provided dashboard links.
  * Check for any additional applications of the tag beyond the specified deep link.
* **Expected vs Actual Behavior:**
  * Expected: The tag should only be applied through deep link 995058.
  * Actual: The tag was applied through multiple sources, including other links.

3. Root Cause & Solution

* **Root Cause:**

* The discrepancy was due to the tag being applied through multiple client operations or links, not solely via the specified deep link. The client independently identified additional sources applying the tag.
* **Solution:**
  * The client successfully identified the root cause of the data discrepancy, confirming it was due to their internal operations. No further action from the product or engineering team is required. The issue is resolved.

***

Investigation of Tag Addition Delay in MAAC Contact List

Metadata

* **Feature:** MAAC-Tag
* **Created At:** 2025-10-07
* **Asana Task ID:** [1211575001403892](https://app.asana.com/1/1184020052539844/task/1211575001403892)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported that after adding tags to filtered contacts in MAAC before a holiday, the tags did not appear when they returned on 10/07. Although the system indicated successful tag creation, the tags were not visible immediately.

2. Context & Details

* **Environment Conditions:**
  * MAAC platform used for contact management.
  * Tagging operation performed before a holiday period.
* **User Questions:**
  * How to verify if the tag addition operation was successful?
  * Can the UI be updated to reflect the delay in tag appearance?
* **Reproduction Steps:**
  1. Filter contacts in MAAC.
  2. Add tags to the filtered list.
  3. Observe the system's success message.
  4. Check for the immediate appearance of tags in the UI.
* **Expected vs Actual Behavior:**
  * **Expected:** Tags should appear immediately after the success message.
  * **Actual:** Tags do not appear immediately, leading to user perception of failure.

3. Root Cause & Solution

* **Root Cause:**
  * The tagging operations are correctly recorded in the backend, as confirmed by audit logs. The delay is due to an asynchronous process or data synchronization latency between the backend operation and the MAAC user interface. The current UI message does not adequately communicate this delay.
* **Solution:**
  * Engineering should investigate the specific delay mechanism and duration for tag display in MAAC after bulk operations.
  * Update the MAAC UI to provide clearer feedback on tag addition, indicating that tags are being applied and may take time to appear.

***

Investigation of Unexpected Tag Appearance in MAAC

Metadata

* **Feature:** MAAC-Tag
* **Created At:** 2025-10-02
* **Asana Task ID:** [1211528743341634](https://app.asana.com/1/1184020052539844/task/1211528743341634)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported an unexpected situation where a tag named "拉 03 deleted_at 2025-03-09 07:40:51" appeared in their MAAC system. The tag ID is \[REDACTED]. The client was unable to determine the origin of this tag using the Metabase Audit Log.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 73
  * MAAC bot/channel ID: 69
  * Happened on: 10/2
* **User Questions:**
  * Why did the tag "拉 03 deleted_at 2025-03-09 07:40:51" appear in the MAAC system?
* **Reproduction Steps:**
  * The client attempted to trace the tag's origin using the Metabase Audit Log but found no clues.
* **Expected vs Actual Behavior:**

* Expected: No unexpected tags should appear in the MAAC system.
* Actual: The tag "拉 03 deleted_at 2025-03-09 07:40:51" appeared unexpectedly.

3. Root Cause & Solution

* **Root Cause:**
  * The tag was created via a Messagelink action and immediately soft-deleted on 2025-10-02. It is suspected to be due to user error or an accidental trigger through Messagelink. The origin of the `deleted_at` timestamp within the tag name is not definitively identified.
* **Solution:**
  * The tag was soft-deleted. No specific system bug was identified based on available logs. The client will monitor for future occurrences.

***

Investigation of Extended Tag Deletion Time in MAAC-Tag

Metadata

* **Feature:** MAAC-Tag
* **Created At:** 2025-09-03
* **Asana Task ID:** [1211222283206634](https://app.asana.com/1/1184020052539844/task/1211222283206634)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Too costly

1. Issue Description

The client reported that deleting tags takes at least one minute, which they believe is a performance issue. They are concerned about whether this duration is within expected parameters, especially given the large number of tags and contacts involved.

2. Context & Details

* **Environment:** The issue occurs in accounts with a large number of contacts and tags, such as FamilyMart.
* **User Questions:** Is the extended duration for tag deletion expected?
* **Reproduction Steps:**
  * Attempt to delete a tag from an account with a large contact base.
  * Observe the loading time, which exceeds one minute.
* **Expected vs Actual Behavior:**
  * **Expected:** Tag deletion should complete in a reasonable time frame.
  * **Actual:** Tag deletion takes over one minute.

3. Root Cause & Solution

* **Root Cause:** The system performs checks on all associated contacts when a tag is deleted. For accounts with a large contact base, this process is resource-intensive, leading to extended loading times. This is considered expected behavior for large-scale operations.
* **Solution:** This behavior is an expected performance characteristic for large accounts. No immediate engineering fix is required. Customer Success should manage customer expectations regarding tag deletion duration, especially during bulk operations or tag restructuring.

***

Investigation of Tag Disappearance After Name Change in Message Module

Metadata

* **Feature:** MAAC-Tag
* **Created At:** 2025-06-26
* **Asana Task ID:** [1210638961172045](https://app.asana.com/1/1184020052539844/task/1210638961172045)
* **Ticket Priority:** P2
* **Client Name:** N/A
* **Resolution Owner:** Xander
* **Result Breakdown:** Limit information

1. Issue Description

After changing the name of a tag, the tag disappears from the message module editor. This issue specifically affects the Deeplink's new friend message setting.

2. Context & Details

* **Environment Conditions:**
  * The issue occurs within the message module editor.
  * It is associated with the Deeplink's new friend message setting.
* **Reproduction Steps:**
  1. Set a tag in the message of Deeplink's new friend message.
  2. Change the name of the tag.
  3. Check the message from Deeplink again.
  4. Observe that the tag has disappeared.
* **Expected vs Actual Behavior:**
  * **Expected:** The tag name should update across all related features without disappearing.
  * **Actual:** The tag disappears from the message module editor after the name change.

3. Root Cause & Solution

* **Root Cause:** The root cause is currently under investigation. An initial assessment by the engineering team suggests a general understanding of the problem, but a definitive cause has not yet been identified or documented.
* **Solution:** No immediate solution has been identified or implemented. A comprehensive investigation is required to develop a robust solution for this and related tag management issues. The issue is under investigation and categorized as lower priority, with plans for a comprehensive solution addressing multiple tag-related problems.

Broadcast

Feature Overview

System Design

Product Specifications

Troubleshooting & FAQ

Template Library

Feature Overview

System Design

Product Specifications

Troubleshooting & FAQ

broadcast_asana_history_knowledge_base_final

Why Are URLs Not Being Shortened and Tagged in Broadcast Messages?

Metadata

* **Feature:** MAAC-Broadcast
* **Created At:** 2025-11-20

* **Asana Task ID:**
[1211999938098480](https://app.asana.com/1/1184020052539844/task/1211999938098480
)
* **Ticket Priority:** P2
* **Client Name:** DK Marketing
* **Resolution Owner:** Jalex
* **Result Breakdown:** Fix Problems

1. Issue Description

The client, DK Marketing, reported that URLs inserted in broadcast messages are not being
converted into shortened links (<https://maac.io>) when sending test messages or actual
broadcasts. Consequently, no tags are assigned when the URL is clicked. This issue affects
both test and actual broadcast messages.

2. Context & Details

* **Environment Conditions:**
  * The issue is reproducible on the client account during test sending but not on the JP
demo account.
  * MAAC org ID: 38
  * MAAC bot/channel ID: 37
  * Feature ID: 92186
* **Reproduction Steps:**
  1. Insert a URL in the broadcast message.
  2. Send a test message or an actual broadcast.
  3. Observe that the URL remains unshortened and no tag is assigned upon clicking.
* **Expected vs Actual Behavior:**
  * **Expected:** URLs should be converted into shortened links, and tags should be
assigned upon clicking.
  * **Actual:** URLs remain unshortened, and no tags are assigned.

3. Root Cause & Solution

* **Root Cause:** A recently implemented MAAC logic explicitly skipped short URL
conversion for URLs starting with <https://miniapp.line.me>. This was based on an
assumption that it might cause issues similar to LIFF links. However, this assumption was
found to be unnecessary after evaluation.
* **Solution:** The skip logic for <https://miniapp.line.me> URLs has been removed. MAAC
now correctly converts these URLs into short links, resolving the issue.

***

Investigation of Broadcast Delivery Failure to Active Contacts

Metadata

* **Feature:** MAAC-Broadcast

* **Created At:** 2025-10-06
* **Asana Task ID:** [1211557302787615](https://app.asana.com/1/1184020052539844/task/1211557302787615)
* **Ticket Priority:** P2
* **Client Name:** IXION - みんカラ
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The broadcast titled "251003_ポイント 10 倍 + 特集ランキング" was sent to all active contacts on October 3 via Smart Sending. However, one user reported not receiving the broadcast.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 13
  * MAAC bot: 12
  * Broadcast name: 251003_ポイント 10 倍 + 特集ランキング
  * UID of affected user: \[REDACTED]
* **Reproduction Steps:**
  * Broadcast sent on October 3 using Smart Sending.
  * User TAKE reported non-receipt of the broadcast.
* **Expected vs Actual Behavior:**
  * Expected: All active contacts receive the broadcast.
  * Actual: One user initially reported not receiving the broadcast.

3. Root Cause & Solution

* **Root Cause:**
  * The user ultimately confirmed receipt of the broadcast. The initial report of non-receipt was inaccurate or based on a misunderstanding of delivery.
* **Solution:**
  * The issue was a false alarm. No system bug was identified, and no product or engineering changes are required. The status is resolved.

Rich Menu

Feature Overview

System Design

Product Specifications

Troubleshooting & FAQ

richmenu_asana_history_knowledge_base_final

Investigation of Incorrect Rich Menu Tagging After Contact Import via API

Metadata

* **Feature:** MAAC-Richmenu
* **Created At:** 2025-10-31
* **Asana Task ID:**
[1211803131074457](https://app.asana.com/1/1184020052539844/task/1211803131074457)
* **Ticket Priority:** P2
* **Client Name:** Advance Medical Clinic
* **Resolution Owner:** David
* **Result Breakdown:** Fix Problems

1. Issue Description

The system incorrectly assigned the 'Prestige' Rich Menu to a user tagged with 'Classic' after importing contacts via the MAAC API. The expected Rich Menu should have been 'Classic', but the user received 'Prestige' despite not having the 'Prestige' tag in their profile.

2. Context & Details

* **Environment Conditions:**
  * The account is configured with Rich Menus tagged by membership tiers: Classic, Prestige, Signature, and Elite.
  * Contacts were imported using the MAAC API.
* **Reproduction Steps:**
  1. Import contact with 'Classic' tag via MAAC API.
  2. Observe the assigned Rich Menu.
* **Expected vs Actual Behavior:**
  * **Expected:** User with 'Classic' tag receives 'Classic' Rich Menu.
  * **Actual:** User with 'Classic' tag received 'Prestige' Rich Menu.
* **Additional Information:**
  * The issue's impact on end users is unclear.
  * Occurrences were noted daily around 01:00 UTC+7 for specific users.

3. Root Cause & Solution

* **Root Cause:**
  * The MAAC system logs do not indicate any internal unlinking of Rich Menus. Engineering monitoring confirmed that specific members experienced daily unlinking. The issue is attributed to a third-party vendor's scheduled job interfering with LINE Rich Menu assignments.
* **Solution:**
  * No changes are required within the MAAC system. The client should collaborate with third-party vendors (Beacon, Loyalty, CDP) to identify and resolve the external processes causing the Rich Menu changes.

Auto-reply

Feature Overview

System Design

Product Specifications

Troubleshooting & FAQ

auto reply_asana_history_knowledge_base_final

Investigation of Auto-Reply Trigger Failure on Facebook Messenger

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2026-02-06
* **Asana Task ID:** [1213145171671763](https://app.asana.com/1/1184020052539844/task/1213145171671763)
* **Ticket Priority:** P2
* **Client Name:** N/A
* **Resolution Owner:** Kade
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client configured an auto-reply by keyword on Facebook Messenger, but it was not triggered as expected. The specific keyword used was 'สนใจ'.

2. Context & Details

* **Environment:**
  * MAAC org ID: 5967
  * MAAC bot/CAAC channel ID: 5058
* **Reproduction Steps:**
  * A new contact sends a message containing the keyword 'สนใจ' on Facebook Messenger.
  * The auto-reply is expected to trigger upon the first interaction.
* **Expected vs Actual Behavior:**
  * **Expected:** The auto-reply should trigger immediately upon receiving the keyword from a new contact.
  * **Actual:** The auto-reply does not trigger on the first interaction but only from the second interaction onward.

3. Root Cause & Solution

* **Root Cause:** The MAAC system design, in compliance with Meta's policy, blocks keyword auto-replies for new contacts. The recipient type "New Friend" is disabled by default.
* **Solution:** To ensure auto-replies for initial contacts, enable the "Welcome Message for New Friends" feature. This will allow keyword auto-replies to function correctly in subsequent interactions.

The product team has logged this requirement and is currently evaluating the logic. Optimizations are planned for later this year.

***

Investigation of Message Delivery Failure in Instagram Auto-Reply

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2026-02-05
* **Asana Task ID:** [1213115186501125](https://app.asana.com/1/1184020052539844/task/1213115186501125)
* **Ticket Priority:** P3
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Kade
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The Instagram auto-reply feature fails to trigger on the first keyword input. The auto-reply names affected include:

* "2/4 廣告 _ 我想了解 外輪廓固定 活動價格"

* "2/4 廣告 _ 我想了解 線雕美鼻優惠價格"

2. Context & Details

* **Environment:**
  * Channel Type: Instagram
  * MAAC org id: 6542
  * Affected contact id: \[REDACTED_ID]
* **User Questions:**
  * Why does the auto-reply require two keyword inputs to trigger?
* **Reproduction Steps:**
  1. User inputs a keyword via Instagram Story.
  2. Auto-reply fails to trigger on the first input.
* **Expected vs Actual Behavior:**
  * **Expected:** Auto-reply should trigger on the first keyword input.
  * **Actual:** Auto-reply requires a second input to trigger.

3. Root Cause & Solution

* **Root Cause:**
  * MAAC's system logic prevents keyword auto-replies from being sent to new contacts on Meta channels. The "new friend" recipient type is disabled by default for keyword auto-replies, resulting in "Message Replied = false". This is a known product limitation.
* **Solution:**
  * **For Customers:** Utilize the "New Friend Welcome Message" for initial interactions, then guide users to trigger keyword auto-replies for subsequent engagements.
  * **For Product:** Evaluate and optimize the interaction and priority logic between keyword auto-replies and new contact handling.

***

Investigation of Keyword Case Sensitivity Issue in MAAC Auto-Reply

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2026-02-04
* **Asana Task ID:** [1213109852110296](https://app.asana.com/1/1184020052539844/task/1213109852110296)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Jack Lee
* **Result Breakdown:** Task-Ticket

1. Issue Description

The MAAC auto-reply system does not retain user-defined case for keywords during storage, display, or matching. This is a known issue.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 668
  * MAAC bot ID: 642
  * Channel Type: LINE
* **User Questions:**
  * Why are keyword settings not retaining the specified case?
* **Reproduction Steps:**
  * Set a keyword in uppercase.
  * Observe that it is automatically converted to lowercase.
* **Expected vs Actual Behavior:**
  * **Expected:** Keywords should retain the case as set by the user.
  * **Actual:** Keywords are converted to lowercase, affecting storage, display, and matching.

3. Root Cause & Solution

* **Root Cause:** The current keyword mechanism in MAAC lacks support for case sensitivity, leading to automatic conversion to lowercase.
* **Solution:**
  * Inform customers that keyword matching is currently case-insensitive.
  * Engineering team to implement case sensitivity for MAAC auto-reply keywords as part of planned optimizations.
  * Status: The issue is confirmed, the customer has been notified, and optimization is planned.

***

How to Configure Uppercase Keywords in MAAC Auto-Reply

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2026-01-15
* **Asana Task ID:** [1212821276171610](https://app.asana.com/1/1184020052539844/task/1212821276171610)
* **Ticket Priority:** P3
* **Client Name:** N/A
* **Resolution Owner:** Jack Lee
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The unexpected situation reported was that the MAAC auto-reply feature does not allow setting keywords in uppercase.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 5722
  * MAAC bot/channel ID: 4619
* **User Questions:**
  * Is there a restriction on setting uppercase keywords?
  * What are the design considerations if such a restriction exists?
* **Reproduction Steps:**
  * Attempt to set an auto-reply keyword in uppercase.
  * Observe that the keyword is converted to lowercase in the UI.
* **Expected vs Actual Behavior:**
  * **Expected:** Keywords should retain their original casing as entered by the user.
  * **Actual:** Keywords are displayed in lowercase, although functionality remains unaffected.

3. Root Cause & Solution

* **Root Cause:**
  * The MAAC backend stores keywords in lowercase, and the UI reflects this stored value. The keyword matching logic is case-insensitive, ensuring that the functionality is not impacted by the casing.
* **Solution:**
  * The MAAC UI will be updated to display the original casing entered by the user. Customers should be informed that the case conversion in the UI does not affect the auto-reply trigger functionality. The UI adjustment is planned, and communication with customers has been completed.

***

Investigation of Auto-Reply Delays and Failures in Specific Time Intervals

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2026-01-15
* **Asana Task ID:** [1212806889218671](https://app.asana.com/1/1184020052539844/task/1212806889218671)
* **Ticket Priority:** P2
* **Client Name:** Deanston \[REDACTED]
* **Resolution Owner:** JY
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The MAAC auto-reply feature experienced failures and delays in message delivery during specific time intervals. On January 15th, there was no response at 16:56, and a delayed response at 17:06, which was only sent at 17:09.

2. Context & Details

* **Environment Conditions:**
  * MAAC Organization ID: 5236
  * MAAC Bot ID: 4165
  * Incident Date: January 15th
  * Recent update to auto-reply feature on the same day
* **User Questions:**
  * Can the issue be reproduced?
* **Reproduction Steps:**
  * Attempt to trigger auto-reply messages during the specified time intervals.
* **Expected vs Actual Behavior:**
  * Expected: Auto-reply messages should be sent immediately upon triggering.
  * Actual: No response at 16:56 and a delayed response at 17:06, sent at 17:09.

3. Root Cause & Solution

* **Root Cause:**
  * The LINE channel access token for the client's MAAC organization expired prematurely. This was due to either another system or frequent manual refreshes by the client, which invalidated MAAC's token and resulted in an "Authentication failed" error.
* **Solution:**
  * The issue was resolved by manually refreshing the token. It is recommended to monitor the client's token refresh behavior and advise them on proper LINE token management, especially if multiple systems are involved, to prevent recurrence.

***

Investigation of Keyword Auto-Reply Trigger Issue on Instagram

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2026-01-13
* **Asana Task ID:** [1212740607334933](https://app.asana.com/1/1184020052539844/task/1212740607334933)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported that the Instagram keyword auto-reply feature does not trigger a message when a keyword is entered once. It requires a second entry of the keyword to successfully trigger the message.

2. Context & Details

* **Environment:**
  * MAAC org ID: 5319
  * MAAC bot/channel ID: 4232
* **Reproduction Steps:**

  1. Enter the keyword "我想要模擬考題包" once in the Instagram chat.

  2. Observe that the auto-reply is not triggered.

  3. Enter the keyword a second time.

  4. Observe that the auto-reply is successfully triggered.
* **Expected vs Actual Behavior:**
  * **Expected:** The auto-reply should trigger upon the first entry of the keyword.
  * **Actual:** The auto-reply only triggers after the keyword is entered a second time.
* **Additional Information:**
  * The issue can be reproduced consistently.
  * Relevant screenshots or screen recordings are available
[here](https://app.asana.com/app/asana/-/get_asset?asset_id=1212740607334948).

3. Root Cause & Solution

* **Root Cause:** The MAAC's Meta channel keyword auto-reply feature does not support sending messages to new contacts. The system classifies the first interaction as a "new friend," and if no welcome message is set, the keyword auto-reply is disabled.
* **Solution:**
  * Update the help documentation to clearly explain this behavior.
  * Advise clients to enable a "new friend welcome message" for the first contact, followed by keyword auto-replies for subsequent interactions.
  * The product team plans to optimize the interaction logic between keyword auto-replies and welcome messages within the year.

The issue has been confirmed, documentation has been updated, and product enhancements are planned.

***

Investigation of Image Carousel Addition Failure in Auto-Reply

Metadata

* **Feature:** MAAC-Auto reply

* **Created At:** 2025-12-19
* **Asana Task ID:**
[1212516260073008](https://app.asana.com/1/1184020052539844/task/1212516260073008
)
* **Ticket Priority:** P2
* **Client Name:** Panpuri
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client is unable to add more images to the image carousel in the Auto-Reply message
for bounded contacts. The UI does not display the "+" button needed to add images, despite
attempts to slide and locate it. This issue does not occur when tested by others.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 5403
  * MAAC bot/CAAC channel ID: 4300
  * Auto-Reply URL: \[REDACTED]
* **User Actions:**
  * Attempted to slide and find the "+" button to add images.
  * Issue persists after refreshing the page.
* **Reproduction Steps:**
  * Log into the MAAC system.
  * Navigate to the Auto-Reply message configuration.
  * Attempt to add images to the carousel.
* **Expected vs Actual Behavior:**
  * Expected: "+" button should be visible to add images.
  * Actual: "+" button is not visible, preventing image addition.

3. Root Cause & Solution

* **Root Cause:**
  * The root cause is undetermined as the issue is not reproducible by the Engineering team.
* **Solution:**
  * A temporary workaround was provided by the Customer Success Manager, who manually
configured the image carousel.
  * Engineering requires a screen recording from the client to investigate further.
  * Suggested workaround: The client may create a new auto-reply as a potential solution.
* **Status:** Pending client's screen recording for further investigation.

***

Investigation of Auto-Reply Failure on Instagram

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-12-03
* **Asana Task ID:**
[1212278988595118](https://app.asana.com/1/1184020052539844/task/1212278988595118)
* **Ticket Priority:** P2
* **Client Name:** creammm.t
* **Resolution Owner:** Jalex
* **Result Breakdown:** Too costly

1. Issue Description

The auto-reply feature on Instagram failed to trigger when a new contact, whose profile does not exist in MAAC, replied to an IG story with a specific keyword.

2. Context & Details

* **Environment Conditions:**
  * MAAC organization ID: 5881
  * MAAC IG ID: 5348
  * Occurrence Date: 12/3
* **Reproduction Steps:**
  * A new contact replies to an IG story using the keyword "新年".

* **Expected vs Actual Behavior:**
  * **Expected:** The auto-reply should be sent to the new contact.
  * **Actual:** No auto-reply message was sent.
* **Additional Information:**
  * The issue can be reproduced as demonstrated in the first comment video.
  * It is noted that if a message is received during testing, it may have been manually sent by the user.

3. Root Cause & Solution

* **Root Cause:** The MAAC system's logic for Meta channels does not support sending keyword-triggered auto-replies to "new contacts." The system defaults to disabling message sending to new contacts, resulting in "Message Replied = false."
* **Solution:** No immediate product optimization is planned. The help center will be updated to clarify the current behavior of Meta channels regarding new contacts and keyword auto-replies. The product team will evaluate and optimize the logic for Meta auto-replies concerning new contacts and the interaction between keyword auto-replies and welcome messages, with expected improvements in the first quarter alongside the WA auto-reply project.

***

Investigation of Anomalous Data in Auto Reply Feature

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-11-28
* **Asana Task ID:** [1212207746495315](https://app.asana.com/1/1184020052539844/task/1212207746495315)
* **Ticket Priority:** P2
* **Client Name:** Vitabox 維他盒子
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The auto-reply journey exhibits an inconsistency where the keyword trigger count is only 10, yet the subsequent click count exceeds a thousand, which appears unreasonable.

2. Context & Details

* **Environment Conditions:**
  * MAAC org id / CAAC org id: 4133
  * MAAC bot / CAAC channel ID: 3382
* **User Questions:**
  * Can the issue be reproduced?
* **Reproduction Steps:**
  * Access the auto-reply report at: \[REDACTED_URL]
* **Expected vs Actual Behavior:**
  * Expected: The keyword trigger count should align with the click count.
  * Actual: The keyword trigger count is significantly lower than the click count.

3. Root Cause & Solution

* **Root Cause:**
  * The MAAC system aggregates performance metrics for the "send message" component based on message text content rather than the specific feature instance. This results in aggregated metrics across different features using identical message texts, preventing feature-specific analysis.
* **Solution:**
  * Implement distinct metric tracking for identical message texts based on their feature context. Consider adding context identifiers or unique message IDs to each instance to differentiate metrics accurately.
* **Status:**
  * Awaiting Product/Engineering Design Review.

***

Investigation of Auto-Reply Editing Failure in MAAC System

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-11-25
* **Asana Task ID:**
[1212084549446863](https://app.asana.com/1/1184020052539844/task/1212084549446863)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Jalex
* **Result Breakdown:** Fix Problems

1. Issue Description

The client reported that specific auto-replies, namely "I want product information" and "A1
My investment performance is not as expected, how should I handle it?" could not be edited.
Attempts to proceed with editing did not result in any navigation changes, and no errors were
logged in the console.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 824
  * MAAC bot/channel ID: 728
  * Issue reproducible: Yes
  * Occurrence date: 11/25
* **User Actions:**
  * Attempted to edit specific auto-replies via the provided URL.
  * Navigation failed to proceed to the next step without any console errors.
* **Reproduction Steps:**
  1. Access the auto-reply edit page.
  2. Attempt to proceed to the next step.
  3. Observe the lack of navigation or error messages.
* **Expected vs Actual Behavior:**
  * **Expected:** Successful navigation to the next step upon editing auto-replies.
  * **Actual:** No navigation occurs, and no error messages are displayed.

3. Root Cause & Solution

* **Root Cause:**
  * The legacy auto-reply data contained parameters with empty URL strings. The current
frontend validation requires valid URLs, which led to silent validation failures and blocked UI
interactions.
* **Solution:**
  * Manually removed invalid URL parameters from the affected auto-replies.

* Executed a system-wide script to clean 3212 similar invalid URL parameters from all old webhook trigger messages.
  * The issue has been resolved.

***

Investigation of Error Code and Content Loss During Editing

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-11-19
* **Asana Task ID:** [1211990876371633](https://app.asana.com/1/1184020052539844/task/1211990876371633)
* **Ticket Priority:** P2
* **Client Name:** 法國在台協會
* **Resolution Owner:** Tracy
* **Result Breakdown:** Too costly

1. Issue Description

Users encountered an error code (2d0dfa3cb7ab4a0fa993a2160a810955) while editing auto-replies in MAAC, resulting in the loss of all editing content. The client did not provide screenshots, only the copied error code.

2. Context & Details

* **Environment Conditions:**
  * MAAC organization ID: 5190
  * MAAC bot ID: 4127
  * Error occurred on 11/19
* **User Questions:**
  * Can the issue be reproduced?
* **Reproduction Steps:**
  * Users were editing auto-replies when the error occurred.
* **Expected vs Actual Behavior:**
  * Expected: Successful editing of auto-replies without errors.
  * Actual: Error code appeared, and all editing content was lost.

3. Root Cause & Solution

* **Root Cause:**
  * The exact root cause was not definitively identified. It appears to be an intermittent client-side or API error, as refreshing the page resolved the issue. MAAC audit logs did not show corresponding backend failures for the action.
* **Solution:**

* The immediate workaround was for users to refresh the page. The issue is considered low priority due to its intermittent nature and the customer being unblocked. Further investigation is not planned at this time. The status is resolved, with monitoring for recurrence.

***

Investigation of Display Name Issue for New OA Contacts

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-11-18
* **Asana Task ID:** [1211975651294654](https://app.asana.com/1/1184020052539844/task/1211975651294654)
* **Ticket Priority:** P2
* **Client Name:** Vertex Clinic
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported that when a user messages the OA, the display name appears as "Khun + New Friend" instead of "Khun + Display Name." This issue occurs for users who have just added the OA and are not existing friends.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 5909
  * MAAC bot/CAAC channel ID: 4773
  * Occurrence time: 01:44 AM
* **User Questions:**
  * Have similar cases been observed previously?
* **Reproduction Steps:**
  * A new user adds the OA and sends a message.
* **Expected vs Actual Behavior:**
  * Expected: Display name should appear as "Khun + Display Name."
  * Actual: Display name appears as "Khun + New Friend."

3. Root Cause & Solution

* **Root Cause:**
  * The issue arises when users do not grant third-party service permission via a LIFF page. The LINE API restricts access to the user's profile name, resulting in the display of "New Friend."
* **Solution:**

* This behavior is an expected limitation due to LINE LIFF API permissions. The team will explore strategies for handling profiles without names and communicate this limitation to Customer Success Managers (CSMs). The status is acknowledged as "By Design."

***

Why Are MAAC Keyword-Triggered Auto-Replies Failing to Send Messages?

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-10-30
* **Asana Task ID:** [1211790517659590](https://app.asana.com/1/1184020052539844/task/1211790517659590)
* **Ticket Priority:** P2
* **Client Name:** N/A
* **Resolution Owner:** Jalex
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The unexpected situation involves MAAC keyword-triggered auto-replies that are created using templates. These auto-replies successfully trigger but fail to send messages. In contrast, manually created auto-replies function correctly.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 6214
  * MAAC bot/channel ID: 6022
  * Occurrence time: 10/30 at 14:00
  * Reproducibility: Yes
* **User Questions:**
  * Why do template-based auto-replies fail to send messages after triggering?
* **Reproduction Steps:**
  1. Create a keyword-triggered auto-reply using a template.
  2. Trigger the auto-reply using the specified keyword.
  3. Observe that the message does not send.
* **Expected vs Actual Behavior:**
  * **Expected:** Auto-replies should send messages upon keyword trigger.
  * **Actual:** Auto-replies trigger but do not send messages.

3. Root Cause & Solution

* **Root Cause:** A configuration error specific to template-generated auto-replies prevents message dispatch after the keyword trigger is detected.

* **Solution:** Investigate the message dispatch logic for template-based auto-replies. As a workaround, advise customers to create keyword auto-replies manually.

***

How to Migrate MAAC Settings Across Different LINE Providers

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-10-24
* **Asana Task ID:** [1211737450106162](https://app.asana.com/1/1184020052539844/task/1211737450106162)
* **Ticket Priority:** P2
* **Client Name:** DMM
* **Resolution Owner:** Tracy
* **Result Breakdown:** Task-Ticket

1. Issue Description

The client requested the replication of existing MAAC settings, including over 80 auto-replies, 3 rich menus, and around 10 scenario journeys, to a newly created MAAC account. The request was made to avoid manual reconfiguration due to a setup miscommunication that rendered the current MAAC unusable for production.

2. Context & Details

* **Environment Conditions:**
  * MAAC org id: 155
  * MAAC bot/CAAC channel ID: 198
* **User Questions:**
  * Can the engineering team support bulk migration of MAAC settings?
* **Reproduction Steps:**
  * Attempt to migrate settings from MAAC org 155 to a new MAAC account.
* **Expected vs Actual Behavior:**
  * Expected: Seamless migration of settings.
  * Actual: Technical limitations prevented automated migration.

3. Root Cause & Solution

* **Root Cause:**
  * MAAC settings are intricately linked to specific LINE Bot/Channel IDs and their provider configurations. The system is not designed to support direct migration between different LINE providers, making such operations technically complex and risky.
* **Solution:**
  * The Customer Success team manually re-created all auto-replies, rich menus, and journeys from MAAC org 155 into MAAC org 158.

* It is recommended that Product/Engineering evaluate the demand for cross-provider migration features and enhance internal guidance for Customer Success Managers (CSMs) on handling such scenarios.

Status: Closed.

***

Investigation of Unexpected Automated Reply in MAAC System

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-10-23
* **Asana Task ID:** [1211730242249302](https://app.asana.com/1/1184020052539844/task/1211730242249302)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

A customer reported receiving an automated reply that was not configured in the MAAC's general responses or in the native backend auto-reply settings.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 3216
  * MAAC bot/channel ID: 2755
  * Occurrence Date: 2025/10/23
  * Reproducibility: Yes
* **User Questions:**
  * Why is an unconfigured automated reply being sent?
* **Reproduction Steps:**
  1. Verify the automated reply settings in MAAC.
  2. Check the native backend auto-reply settings.
  3. Observe the unexpected automated reply.
* **Expected vs Actual Behavior:**
  * **Expected:** Only configured automated replies should be sent.
  * **Actual:** An unconfigured automated reply was sent.

3. Root Cause & Solution

* **Root Cause:** The automated reply was configured in an external Content Management System (CMS), which was not initially checked.

* **Solution:** The issue was resolved by the customer upon identifying the external CMS configuration. No further action from the product or engineering team is required. For future occurrences, it is recommended that Customer Success Managers (CSMs) guide customers to verify all integrated messaging system settings.

***

Investigation of Image Display Issue in MAAC Auto-Reply on Specific Device

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-10-16
* **Asana Task ID:** [1211658874580570](https://app.asana.com/1/1184020052539844/task/1211658874580570)
* **Ticket Priority:** P2
* **Client Name:** BABI
* **Resolution Owner:** Tracy
* **Result Breakdown:** Not our issue

1. Issue Description

The images in the MAAC auto-reply are not visible on a specific Windows 10 device using the LINE Desktop application version 9.12.1.3713. This issue does not occur on mobile devices, and the Customer Support Manager (CSM) could not reproduce the issue on a Mac OS.

2. Context & Details

* **Environment Conditions:**
  * Device: Windows 10
  * LINE Desktop Version: 9.12.1.3713
* **Reproduction Steps:**
  * The issue occurs when viewing auto-reply images on the specified Windows 10 device.
  * The issue does not occur on mobile devices or when tested on Mac OS.
* **User Actions:**
  * The client attempted to change the network connection, but the issue persisted.
* **Expected vs Actual Behavior:**
  * Expected: Images should display correctly in the auto-reply on all devices.
  * Actual: Images do not display on the specified Windows 10 device.

3. Root Cause & Solution

* **Root Cause:**
  * The issue is likely client-side, possibly due to an outdated version of the LINE Desktop application. There are unofficial reports of image display issues in LINE Desktop versions 9.12-9.13 on Windows.

* **Solution:**
  * Advise the client to update their LINE Desktop application to the latest version available.
* **Status:**
  * Pending client action to update the application.

***

Investigation of Google Maps Link Display Issue in MAAC Auto-Reply

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-10-02
* **Asana Task ID:** [1211529952491962](https://app.asana.com/1/1184020052539844/task/1211529952491962)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported that the Google Maps link embedded in the MAAC auto-reply, which previously directed to the correct address, now results in an "invalid coord" error when accessed. The auto-reply in question is named "Toilet_Suao Area" with an ID of 876428.

2. Context & Details

* **Environment Conditions:**
  * MAAC Organization ID: 5553
  * MAAC Bot/CAAC Channel ID: 4476
  * Issue occurrence date: 2025/10/02
  * Reproducibility: Yes
* **User Questions:**
  * Why does the Google Maps link no longer direct to the correct address?
* **Reproduction Steps:**
  1. Access the MAAC auto-reply named "Toilet_Suao Area."
  2. Click on the embedded Google Maps link.
  3. Observe the "invalid coord" error on Google Maps.
* **Expected vs Actual Behavior:**
  * **Expected:** Clicking the link should direct the user to the correct Google Maps address.
  * **Actual:** The link results in an "invalid coord" error, failing to direct to the intended location.

3. Root Cause & Solution

* **Root Cause:**

* The issue stems from complex Google Maps URLs with coordinates being corrupted due to encoding issues when processed by MAAC's internal link handling mechanism, such as through <https://maac.io/>. Directly clicking the original link outside MAAC does not exhibit this problem.
* **Solution:**
  * The auto-reply was updated with a Google Maps shortened URL (e.g., maps.app.goo.gl link), which resolved the issue. Users are advised to use shortened Google Maps URLs within MAAC to prevent this problem. The issue is now resolved.

***

Investigation of Keyword Auto-Reply Failure in MAAC System

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-10-01
* **Asana Task ID:** [1211518547270482](https://app.asana.com/1/1184020052539844/task/1211518547270482)
* **Ticket Priority:** P2
* **Client Name:** Hotel Lovers
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported that the auto-reply with the keyword "UG6S9" is not triggering.

2. Context & Details

* **Client Information:**
  * MAAC org ID: 80
  * MAAC bot ID: 79
* **Feature Information:**
  * Occurrence Time: 2025/10/01 14:28
  * Auto-reply names and keywords:
    * ホテラバチャンスくじ / 250903: keywords "ug6s9", "ｕｇ６ｓ９"
    * 宝箱【300pt プレゼント】 / 250925_アプリ用: keywords "rt7w", "ｒｔ７ｗ"
    * 宝箱【お好きなカラコン１箱プレゼント】 / 250925_アプリ用: keywords "hs5b", "ｈｓ５ｂ"
* **Reproduction:** The issue can be reproduced.
* **Attachments:** [Screenshot](https://app.asana.com/app/asana/-/get_asset?asset_id=1211518547270494)

3. Root Cause & Solution

* **Root Cause:** The client's LINE Developers Webhook URL was changed or removed, and it was not pointing to Crescendo Lab. As a result, MAAC did not receive any LINE Webhook events, which prevented the auto-reply from triggering.
* **Solution:** The client re-configured the LINE Developers Webhook URL to point back to Crescendo Lab's system, which resolved the auto-reply issue. It is suggested to investigate the missing MAAC/Django configuration for the client's paid Webhook forwarding feature. The auto-reply issue is resolved, but the Webhook forwarding investigation is ongoing.

***

Investigation of Auto-Reply Discrepancy in MAAC Settings

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-09-19
* **Asana Task ID:**
[1211405329420293](https://app.asana.com/1/1184020052539844/task/1211405329420293)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported that when entering the keyword "SEA!誰在海底," the response "查無相關商品" was received, which does not match the auto-reply settings configured in MAAC.

2. Context & Details

* **Environment:**
  * MAAC org ID: 5563
  * MAAC bot/channel ID: 4484
* **Reproduction Steps:**
  * Enter the keyword "SEA!誰在海底" in the system.
  * Observe the auto-reply "查無相關商品."
* **Expected Behavior:** The auto-reply should match the configured settings in MAAC.
* **Actual Behavior:** The auto-reply "查無相關商品" was received, which is not configured in MAAC.
* **Additional Information:**
  * The issue can be reproduced as confirmed by customer support testing.
  * Relevant report link: [MAAC Auto-reply Report](https://maac.cresclab.com/autoreply/report/881041)

* Screenshot evidence available in Asana task asset.

3. Root Cause & Solution

* **Root Cause:**
  * The client's LINE webhook forwards messages to their middleware (e.g., Cyberbiz). The auto-reply originated from the client's system, not MAAC.
* **Solution:**
  * MAAC confirmed that no message was sent from our platform. It is advised that the client investigates their middleware or Cyberbiz system to identify the source of the auto-reply. The issue is resolved from the MAAC side.

***

Investigation of Missing Tag Application for New Contacts in Auto-Reply System

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-09-17
* **Asana Task ID:**
[1211383189088844](https://app.asana.com/1/1184020052539844/task/1211383189088844)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** JY
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The unexpected situation reported was that new LINE contacts were not automatically tagged with the "New Friend" label, and the welcome message was not sent as configured in the auto-reply settings.

2. Context & Details

* **Environment Conditions:**
  * MAAC organization ID: 5395
  * MAAC bot ID: 4303
  * Client: \[REDACTED]
* **User Questions:**
  * Does the tag apply automatically upon adding a friend, or is a message required for the tag to apply?
* **Reproduction Steps:**
  * A new contact was added to the LINE account.
  * The auto-reply system was expected to apply the "New Friend" tag and send a welcome message.
* **Expected vs Actual Behavior:**

* **Expected:** New contacts should receive the "New Friend" tag and a welcome message.
  * **Actual:** Neither the tag was applied nor the message was sent.

3. Root Cause & Solution

* **Root Cause:**
  * The MAAC system did not receive the LINE follow events for these users. The user profiles were created through subsequent message interactions. The system functions as expected, suggesting that these users might have been pre-existing LINE friends or that the follow events were not transmitted by LINE.
* **Solution:**
  * There is no system bug. The MAAC mechanism is functioning correctly. It is recommended to inform customer support that the issue is not due to a system error. The case is closed as it meets the product expectations.

***

Investigation of Image Display Issues in Facebook Messenger Card Messages

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-09-08
* **Asana Task ID:** [1211289255692411](https://app.asana.com/1/1184020052539844/task/1211289255692411)
* **Ticket Priority:** P2
* **Client Name:** N/A
* **Resolution Owner:** Jack Lee
* **Result Breakdown:** Not our issue

1. Issue Description

Some Facebook Messenger users occasionally reported that images in card messages sent via MAAC auto-reply were not displayed.

2. Context & Details

* **Issue Occurrence Date:** 8 Sep 2025
* **Reproduction:** The issue is not reproducible; images display normally during testing.
* **Environment Information:**
  * CAAC bot ID: 3992
  * MAAC org ID: 5026
* **User Actions:** Users reported the issue intermittently.
* **Expected Behavior:** Images should display correctly in card messages.
* **Actual Behavior:** Images occasionally do not display for some users.

3. Root Cause & Solution

* **Root Cause:** The issue is currently not reproducible by ProductOps or Engineering. Initial investigation showed the image displaying correctly. It is suspected that the issue might be related to an outdated Messenger application version on the user's device.
* **Solution:** Since the issue cannot be reproduced, no immediate fix is implemented. If the issue reoccurs, gather specific user device information (device type, Messenger app version). This ticket will be closed for now.

***

Investigation of Deeplink Redirection Failure in Meta Auto-reply

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-07-24
* **Asana Task ID:** [1210875549357676](https://app.asana.com/1/1184020052539844/task/1210875549357676)
* **Ticket Priority:** P2
* **Client Name:** Org 1 Test Account
* **Resolution Owner:** Tracy
* **Result Breakdown:** Too costly

1. Issue Description

When a MAAC LINE Deeplink is placed in a Meta Auto-reply and clicked within the iOS Messenger in-app browser, it results in a 404 error, failing to redirect users to LINE OA.

2. Context & Details

* **Environment Conditions:**
  * Occurs within the iOS Messenger in-app browser.
  * MAAC org ID: 1
  * Reproducible: Yes
* **User Questions:**
  * Why does the deeplink fail to redirect in the iOS Messenger in-app browser?
* **Reproduction Steps:**
  1. Place a MAAC LINE Deeplink in a Meta Auto-reply template.
  2. Click the deeplink within the iOS Messenger in-app browser.
* **Expected vs Actual Behavior:**
  * **Expected:** The deeplink should redirect to LINE OA.
  * **Actual:** A 404 error occurs, preventing the redirect.

3. Root Cause & Solution

* **Root Cause:** The issue arises from the behavior of MAAC's short URL (LIFF) when opened in the iOS Messenger in-app browser. The restrictions of the in-app browser lead to a 404 error during the LIFF opening process. This is not an issue with the Meta Auto-reply feature itself.
* **Solution:** Implement a mechanism to detect when a MAAC Deeplink is clicked within the iOS Messenger in-app browser and force it to open through an external browser. This approach has been successfully implemented in CAAC and SRT and should be considered for the full-channel Deeplink POC.

***

Investigation of Auto Reply Functionality Failure

Metadata

* **Feature:** MAAC-Auto reply
* **Created At:** 2025-07-12
* **Asana Task ID:** [1210776362195812](https://app.asana.com/1/1184020052539844/task/1210776362195812)
* **Ticket Priority:** P2
* **Client Name:** Demo_Thailand
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

Recently created auto-replies are not functioning as expected. Keywords such as "fb," "fb2," "fb3," and "linealone" fail to trigger the auto-replies.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 1820
  * MAAC bot ID: \[REDACTED]
* **Reproduction Steps:**
  * Create new auto-replies using specified keywords.
  * Attempt to trigger auto-replies with these keywords.
* **Expected vs Actual Behavior:**
  * **Expected:** Auto-replies should be triggered by the specified keywords.
  * **Actual:** Auto-replies are not triggered by any of the keywords.
* **Additional Information:**
  * The issue is reproducible.
  * Relevant screenshots and screen records are available:
    * [Screenshot 1](https://app.asana.com/app/asana/-/get_asset?asset_id=1210776362195819)
    * [Screenshot 2](https://app.asana.com/app/asana/-/get_asset?asset_id=1210776362195821)

3. Root Cause & Solution

* **Root Cause:**
  * The auto-reply issue has been resolved, but the specific cause was not specified.
  * The Facebook Quick Reply auto-tagging issue is still under investigation.
* **Solution:**
  * The functionality for LINE and Facebook auto-replies has been restored.
  * Engineering will continue to investigate the Facebook Quick Reply tag issue.

Deeplink

Feature Overview

System Design

Product Specifications

Troubleshooting & FAQ

deeplink_asana_history_knowledge_base_final

Investigation of Deeplink Redirection Issue on Facebook App

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2026-02-02
* **Asana Task ID:**
[1213079624870420](https://app.asana.com/1/1184020052539844/task/1213079624870420)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** N/A
* **Result Breakdown:** Not our issue

1. Issue Description

The Facebook mobile application automatically converts external links to lowercase, which causes some Deeplink URLs to redirect to incorrect accounts or become invalid.

2. Context & Details

* **Environment:**
  * Facebook mobile application
  * Affected Deeplink: `https://maac.io/1fKm1` becomes `https://maac.io/1fkm1`
* **User Questions:**
  * Why does the link redirect to a different account?
* **Reproduction Steps:**
  1. Place a Deeplink on a Facebook page.
  2. Click the link using the Facebook mobile app.
* **Expected vs Actual Behavior:**
  * **Expected:** The link should redirect to the correct account.
  * **Actual:** The link redirects to an incorrect account due to casing changes.

3. Root Cause & Solution

* **Root Cause:**
  * The Facebook mobile application modifies the casing of Deeplink URLs, which affects case-sensitive parameters and leads to incorrect redirection.
* **Solution:**
  * **Immediate Workaround:** Generate and use an all-lowercase Deeplink URL.
  * **For Product/Engineering:** Monitor the issue's frequency and consider implementing an option to generate all-lowercase Deeplinks to prevent casing modifications by external platforms.

***

Investigation of CLID Missing During Deep Link Transitions

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2026-01-30
* **Asana Task ID:** [1213035004023053](https://app.asana.com/1/1184020052539844/task/1213035004023053)
* **Ticket Priority:** P2
* **Client Name:** A10Lab
* **Resolution Owner:** David
* **Result Breakdown:** Not our issue

1. Issue Description

An issue was identified where the CLID is not consistently passed to the target form when users transition through specific flows via Deep Links. This inconsistency results in an inability to identify users, negatively impacting their Marketing Automation initiatives and message delivery after the user's application.

2. Context & Details

* **User Flow in Scope:**
  * User clicks the Deep Link.
  * User taps the "Apply Here" button displayed within the message/template.
  * User transitions to the entry form, where the CLID is missing in some cases.
* **Suspected Cause:** The query parameter may be dropped during the transition from the message template to the final form URL.
* **Environment Details:**
  * MAAC org id: 75
  * MAAC bot id: 74
  * Channel Type: LINE
  * Affected contact id: \[REDACTED_ID]
  * MAAC ID: \[REDACTED_ID]
* **Reproduction:** Unclear if the issue can be consistently reproduced in the client organization.
* **Additional Information:** An Excel file with users who failed to receive the CLID is attached. Updates to the deep links have been requested.

3. Root Cause & Solution

* **Root Cause:** The investigation confirmed that the MAAC system consistently appended the CLID parameter during all redirections from the Deep Link to the external URL. The issue appears to originate from the external form platform (zfrmz.jp) not correctly receiving or processing the CLID parameter.
* **Solution:** The engineering team verified that MAAC's redirection mechanism is functioning as expected. It is recommended that the client investigates the parameter handling on their external form platform (zfrmz.jp). No further action is required from MAAC engineering.

***

Investigation of Deeplink Display Failure in Customer Onboarding

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-12-30
* **Asana Task ID:** [1212585827993386](https://app.asana.com/1/1184020052539844/task/1212585827993386)
* **Ticket Priority:** P4
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The current status indicates that the deeplink is not functioning. After a new client onboarded and shared login permissions on 12/29, it was discovered that the region was set to Japan. The client was asked to reshare permissions on 12/30. The client created a new login with the region set to Taiwan and deleted the old login set to Japan. After receiving the new login permissions on 12/30, testing the deeplink during onboarding failed.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 6442
  * MAAC bot/channel ID: 6601
  * Issue occurred on: 2025/12/30
  * Reproducibility: Yes
* **User Actions:**
  * Client initially set up a login with the region as Japan.
  * Client created a new login with the region set to Taiwan and deleted the previous login.
* **Reproduction Steps:**
  1. Client shared login permissions with the region set to Japan.
  2. Client reshared permissions with the region set to Taiwan.
  3. Attempted to test the deeplink after receiving new login permissions.
* **Expected vs Actual Behavior:**
  * **Expected:** Deeplink should function correctly after setting the region to Taiwan.
  * **Actual:** Deeplink failed to work during onboarding testing.

3. Root Cause & Solution

* **Root Cause:**
  * MAAC failed to automatically create the necessary LIFF applications (including Deeplink LIFF) for the newly connected LINE login channel.
* **Solution:**
  * LIFFs were manually created and configured in the new login channel to match LINE Developers settings.
  * It is recommended to review MAAC's automatic LIFF generation process for new login channels to identify potential bugs.

***

Why Do Deeplinks Not Open the LINE App When Clicked from Facebook?

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-12-25
* **Asana Task ID:**
[1212588958360076](https://app.asana.com/1/1184020052539844/task/1212588958360076)
* **Ticket Priority:** P2
* **Client Name:** Sammakorn

* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

When users click a deeplink from a Facebook post, it navigates to the landing page but fails to open the LINE app. Instead, it opens the LINE web interface, displaying the login page.

2. Context & Details

* **Environment Conditions:**
  * Affects all organizations using MAAC deeplinks.
  * Occurs when links are clicked within Meta in-app browsers (e.g., Facebook).
* **Reproduction Steps:**
  1. Create a deeplink.
  2. Place the deeplink in a Facebook post.
  3. Click the deeplink on the Facebook website.
* **Expected vs Actual Behavior:**
  * **Expected:** The link should open the OA chatroom in the LINE app.
  * **Actual:** The link opens the LINE web interface, requiring login.
* **Device Testing:**
  * Samsung Galaxy Fold 5 (Android 16/FB version 543): Stuck on LINE login page.
  * Samsung Galaxy S23 Ultra (Android 16/FB version 543): Opens LINE app correctly.
  * iPhone 17 (iOS 26.1/FB version 543): Mixed results; some devices open normally, others do not.
* **Additional Observations:**
  * Using "login with LINE app" works on some devices.
  * "Open in external browser" consistently opens the LINE app and navigates correctly.
  * The issue is reproducible on specific devices but affects all deeplinks regardless of the creator organization.

3. Root Cause & Solution

* **Root Cause:**
  * The issue is due to a known limitation of Meta's in-app browser environment, which prevents direct redirection to the LINE app and requires re-login through the browser. This is not a MAAC platform issue.
* **Solution:**
  * Update the Thai Deeplink Help Center article to explain the limitation of Meta's in-app browsers.
  * Advise users to open links in an external browser for proper functionality.
  * No platform fix is necessary.

***

Investigation of Button Visibility Issue on Small-Screen iPhones

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-12-12
* **Asana Task ID:**
[1212400140357443](https://app.asana.com/1/1184020052539844/task/1212400140357443)
* **Ticket Priority:** P4
* **Client Name:** N/A
* **Resolution Owner:** Jack Lee
* **Result Breakdown:** Product Optimization

1. Issue Description

Some users on small-screen iPhones, such as the iPhone SE, reported that the "Go to the link" and "Back to LINE" buttons were not visible on the LIFF redirect page.

2. Context & Details

* **Device Information:** iPhone SE with a 4.7-inch screen.
* **Reproduction:** The issue could not be consistently reproduced on an iPhone SE or other devices.
* **Expected Behavior:** Buttons should be visible on the LIFF redirect page.
* **Actual Behavior:** Buttons were not visible to users on certain small-screen iPhones.
* **Additional Information:** Normal behavior as per screenshots provided.

3. Root Cause & Solution

* **Root Cause:** The issue could not be consistently reproduced, and a specific root cause for this instance remains unconfirmed.
* **Solution:** The LIFF redirect page is undergoing a full optimization and redesign in January, which is expected to resolve such display issues. The customer will be notified upon release.

***

Investigation of Message Delivery Failure in Customer Journey

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-11-21
* **Asana Task ID:**
[1212011516046540](https://app.asana.com/1/1184020052539844/task/1212011516046540)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The deep link was expected to trigger a message for both new and existing contacts. However, while new contacts received the message as intended, existing contacts did not. This behavior was confirmed during testing by the Customer Success Manager (CSM).

2. Context & Details

* **Environment:**
  * MAAC org ID: 3763
  * MAAC bot ID: 3143
* **Reproduction Steps:**
  * Use the deep link named "2025_MM_Seller_mapping_OALink".
  * Scan the link with both new and existing contacts.
* **Expected vs Actual Behavior:**
  * **Expected:** Both new and existing contacts should receive the message upon scanning the deep link.
  * **Actual:** Only new contacts receive the message; existing contacts do not.
* **Additional Information:**
  * The issue was reproducible during internal testing.
  * No specific feature ID or time of occurrence was noted.

3. Root Cause & Solution

* **Root Cause:** The root cause was identified as the depletion of message credits on the customer's LINE official account. This was not due to a defect in the MAAC product.
* **Solution:** The customer is required to replenish their LINE message credits via the LINE CMS backend. This action will resolve the issue and allow messages to be sent to existing contacts as expected.

***

How to Resolve Deeplink Issues from Facebook Requiring LINE Sign-In

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-11-17
* **Asana Task ID:** [1211963997510974](https://app.asana.com/1/1184020052539844/task/1211963997510974)
* **Ticket Priority:** P2
* **Client Name:** N/A
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

Users clicking on a Deeplink URL from a Facebook post are unexpectedly redirected to the LINE Sign-in page instead of directly opening the LINE app. This behavior has resulted in a significant drop-off as users are unwilling to proceed due to the added friction.

2. Context & Details

* **Environment Conditions:**
  * The issue is specific to Deeplink URLs placed in Facebook posts.
  * The Deeplink functions correctly outside of Facebook.
* **User Questions:**
  * Why are users being redirected to the LINE Sign-in page?
  * Is there a way to bypass the login prompt and redirect users smoothly into the LINE app?
* **Reproduction Steps:**
  1. Place a Deeplink URL in a Facebook post.
  2. Click the Deeplink URL from the Facebook post.
  3. Observe the redirection to the LINE Sign-in page instead of the LINE app.
* **Expected vs Actual Behavior:**
  * **Expected:** Clicking the Deeplink should open the LINE app directly, allowing users to add the account immediately.
  * **Actual:** Users are redirected to the LINE Sign-in page, and a "Go to link" button appears before redirection, adding extra friction.
* **Additional Observations:**
  * Some users are required to log in to LINE again, while others are not.
  * A reference post from the brand "Double A" does not trigger the forced LINE login.

3. Root Cause & Solution

* **Root Cause:**
  * Meta app in-app browsers block direct, automatic redirects to external apps, necessitating an intermediate "Go to link" page.
  * The LINE OA consent page is controlled by LINE and may appear due to LIFF permission changes or specific user contexts, not our platform.
* **Solution:**
  * A fix was deployed with the flag `enable_deeplink_in_app_browser_force_click` to reliably open Deeplinks in LINE from Facebook, addressing the previous forced LINE login page issue.
  * The "Go to link" button remains necessary due to Meta restrictions. Further UX improvements are under consideration to enhance user experience.

***

Understanding the Definition of Total Clicks for Deeplink on Desktop and Mobile

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-11-14

* **Asana Task ID:**
[1211944509814825](https://app.asana.com/1/1184020052539844/task/1211944509814825
)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Jalex
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client observed discrepancies between the total clicks reported by MAAC and those
reported by an advertising platform. They sought clarification on how MAAC calculates total
clicks for deeplinks on desktop and mobile devices.

2. Context & Details

* **Environment Conditions:**
  * The client used deeplinks in advertisements on an external platform.
  * Discrepancies were noted between MAAC's reported clicks and the external platform's
data.
* **User Questions:**
  * How does MAAC define total clicks for deeplinks on desktop and mobile?
  * Does clicking a deeplink on a desktop count multiple times if the same action is repeated?
  * On mobile, does clicking the link itself count as multiple clicks, or must it proceed through
specific steps?
* **Reproduction Steps:**
  * The client placed a deeplink on an advertisement platform.
  * Observed the click count differences between the platform and MAAC.
* **Expected vs Actual Behavior:**
  * **Expected:** Consistent click counts between MAAC and the advertising platform.
  * **Actual:** MAAC reported fewer clicks than the platform.

3. Root Cause & Solution

* **Root Cause:**
  * The client misunderstood the click counting logic of MAAC's deeplink feature. MAAC
counts a click each time a request is made to the deeplink URL, regardless of the device or
method used. The count increases with each HTTP request to the deeplink, not necessarily
when the LINE app is opened.
* **Solution:**
  * Clarified the click counting logic to the client. MAAC's total clicks are based on requests to
the deeplink URL, not on subsequent actions like opening the LINE app.
  * Suggested enhancing product documentation or the user interface to clearly define the
criteria for counting deeplink clicks.

***

Investigation of Missing Coupon Delivery via Deeplink

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-11-03
* **Asana Task ID:** [1211818239155742](https://app.asana.com/1/1184020052539844/task/1211818239155742)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Limit information

1. Issue Description

The designed process involves users scanning a QR code to receive an auto-reply keyword, which triggers a second deeplink. Upon clicking this second deeplink, users should receive a coupon. However, two users reported not receiving the expected coupon.

2. Context & Details

* **Environment Conditions:**
  * MAAC org id: 548
  * MAAC bot/channel ID: 527
* **User Actions:**
  * Users scanned the "Join Friend QR code" and received the auto-reply.
  * Users clicked the second deeplink for the "Ice Cream Coupon Message."
* **Reported Issue:**
  * Users did not receive the "Ice Cream Coupon" after clicking the second deeplink.
  * No tags were applied to the users' records.
* **Reproduction Steps:**
  * Users scanned the QR code and clicked the second deeplink.
* **Expected vs Actual Behavior:**
  * Expected: Users receive a coupon message.
  * Actual: No coupon message received, and no tags applied.

3. Root Cause & Solution

* **Root Cause:**
  * MAAC logs confirm the deeplink was triggered, but there is no record of the message being sent in the line_messagerecord. Tags were also missing. The issue could not be reproduced. The root cause remains unconfirmed due to the lack of access to the customer's LINE Official Account and detailed logs.
* **Solution:**
  * The task is closed. If the issue recurs, it should be reopened with reproduction steps and access to the customer's LINE Official Account.

***

How to Update Deeplinks for A10lab

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-10-29
* **Asana Task ID:**
[1211779527097305](https://app.asana.com/1/1184020052539844/task/1211779527097305
)
* **Ticket Priority:** P2
* **Client Name:** A10lab
* **Resolution Owner:** N/A
* **Result Breakdown:** N/A

1. Issue Description

The client, A10lab, requested an update to their deeplinks. The unexpected issue identified
was that deeplinks generated from templates do not automatically reflect updates made to
the original template's content, such as image URLs.

2. Context & Details

* **Client Information:**
  * MAAC org id / CAAC org id: 75
  * MAAC bot / CAAC channel ID: 74
* **Request Details:**
  * Estimated number of updates: 1,000
  * Expected completion timeline: Mid-December
* **Reproduction Steps:**
  * Deeplinks created from templates are static and do not update with template changes.
* **Expected vs Actual Behavior:**
  * Expected: Deeplinks should dynamically update with changes to the template.
  * Actual: Deeplinks remain static and do not reflect updates.

3. Root Cause & Solution

* **Root Cause:** Deeplinks are created as static content copies from templates, not
dynamically linked. As a result, any subsequent changes to the template do not propagate to
the deeplinks.
* **Solution:** Manually updated 1,000 deeplinks and their image URLs from 2025 to 2026. It
is suggested that the Product/Engineering team reviews the feasibility of implementing
dynamic linking for templates and deeplinks or documents this static behavior for Customer
Success Managers (CSMs).

***

Investigation of Message Delivery Failure in Customer Journey

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-10-23
* **Asana Task ID:** [1211728764247261](https://app.asana.com/1/1184020052539844/task/1211728764247261)
* **Ticket Priority:** P2
* **Client Name:** 珍煮丹 TRUEDAN

* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The customer reported that deeplinks and rich menu clicks failed to trigger prize coupons or automated journeys as expected.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 3738
  * MAAC bot ID: 3120
  * Feature ID: 2651f8ac-\[REDACTED_PHONE]-9fee-f6067e59f4b1
  * Happened on: 10/23
* **User Actions:**
  * The customer set up a one-week limited activity with two channels.
  * Deeplink scanned: <https://maac.io/4Nj8V>
  * Rich menu clicked: 10/20-2025 珍煮丹 10 月冬茶花事（第 5 格）
* **Reproduction Steps:**
  * Screenshots were taken at 2:32 and 2:51 when the rich menu was clicked and the deeplink was scanned. No response was observed by 4 PM.
* **Expected vs Actual Behavior:**
  * Expected: Prize coupons should be triggered upon scanning the deeplink or clicking the rich menu.
  * Actual: No prize coupons or automated journey responses were triggered.

3. Root Cause & Solution

* **Root Cause:**
  * The customer's LINE CMS message quota was depleted, preventing the execution of MAAC features that require outbound LINE messages.
* **Solution:**
  * The customer replenished the LINE CMS message quota, which resolved the issue. Deeplink and journey features are now functioning correctly.
  * Suggested Action: Improve system alerts or CSM documentation regarding dependencies on LINE CMS message quotas.

***

How to Resolve Deeplink Access Issues in Messenger

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-10-22
* **Asana Task ID:**
[1211717314283351](https://app.asana.com/1/1184020052539844/task/1211717314283351)
* **Ticket Priority:** P2
* **Client Name:** Zurquiz
* **Resolution Owner:** Noel
* **Result Breakdown:** Product Optimization

1. Issue Description

The user is unable to access specific deeplinks via Messenger. Upon clicking the provided links, the expected content does not display, and the screen shows an error as depicted in the attached images.

2. Context & Details

* **Environment Conditions:**
  * Organization ID: 5058
  * Bot ID: 5967
  * User's Device: iPhone 13
  * Internet Connection: 5G
* **Reproduction Steps:**
  1. User clicks on the deeplink provided in Messenger.
  2. The screen displays an error instead of the expected content.
* **Expected vs Actual Behavior:**
  * **Expected:** The deeplink should open the intended content in the browser.
  * **Actual:** The deeplink fails to open, showing an error screen.
* **Additional Information:**
  * The issue was not reproducible on a different device, where the deeplink functioned correctly.

3. Root Cause & Solution

* **Root Cause:** The Messenger in-app browser blocks LINE LIFF deeplinks from opening. The current design of the deeplink does not support forcing an external browser to open, and attempts to do so result in link failure.
* **Solution:** Implement an in-app browser redirect button that allows users to manually open the link in an external browser. This solution is similar to the existing iOS Chrome

workaround. The engineering team has scheduled this optimization for completion by November 4.

***

Investigation of Deep Link Failure in Facebook Environment

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-10-16
* **Asana Task ID:** [1211658876963521](https://app.asana.com/1/1184020052539844/task/1211658876963521)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Too costly

1. Issue Description

The client reported that when using MAAC's deep link in Facebook messages to invite parents to join the official LINE account, multiple users encountered a failure to join. The client seeks to understand the cause of this issue.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 6148
  * MAAC bot/channel ID: 5874
  * Occurrence Date: 2025/10/16
* **User Questions:**
  * Why are users unable to join the LINE account via the deep link shared in Facebook messages?
* **Reproduction Steps:**
  1. Share the MAAC deep link in a Facebook message.
  2. Attempt to join the LINE account through the link.
* **Expected vs Actual Behavior:**
  * **Expected:** Users should be able to join the LINE account directly through the deep link.
  * **Actual:** Users encounter a failure screen and cannot join the LINE account.

3. Root Cause & Solution

* **Root Cause:**
  * The deep link implementation incorrectly forced the opening of an external browser, which conflicted with Meta's in-app browser policies, resulting in the link failure.
* **Solution:**

* The deep link has been optimized for Meta environments. A redirect button is now displayed within the in-app browser, allowing users to manually click and activate the deep link. Additionally, Help Center documentation will be updated to reflect these changes. The solution was launched on 2023-11-10.

***

How to Address SEO Tools Flagging MAAC Links as Broken

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-10-15
* **Asana Task ID:** [1211645610494507](https://app.asana.com/1/1184020052539844/task/1211645610494507)
* **Ticket Priority:** P2
* **Client Name:** Vertex Clinic
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client's SEO tool is identifying all maac.io links as broken, despite the links functioning correctly when accessed manually.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 6211
  * MAAC bot/channel ID: 6089
  * Issue occurred on: 13/10/2025 at 11:45 PM
* **User Questions:**
  * Can the SEO tool's detection of MAAC links as broken be fixed or prevented?
  * Is there any documentation available regarding this issue?
* **Reproduction Steps:**
  * The issue is not reproducible manually as the links work correctly when accessed directly.
* **Expected vs Actual Behavior:**
  * Expected: MAAC links should not be flagged as broken by SEO tools.
  * Actual: SEO tools are flagging MAAC links as broken, though they are operational.

3. Root Cause & Solution

* **Root Cause:**
  * The issue originates from the client's SEO tool detection mechanism, not from the functionality of the MAAC links themselves. The MAAC links are confirmed to be operational.
* **Solution:**

* It is recommended that the client consults with their SEO tool provider to understand and adjust the detection rules. MAAC deeplinks have been verified to function correctly. The status is pending further investigation by the client with their SEO tool provider.

***

Clarification on the Definition of "New Contacts" in Deeplink Data

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-10-14
* **Asana Task ID:** [1211634082654028](https://app.asana.com/1/1184020052539844/task/1211634082654028)
* **Ticket Priority:** P2
* **Client Name:** 雅可樂多
* **Resolution Owner:** JY
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client seeks clarification on the definition of "New Contacts" in the Deeplink data report. There is a discrepancy where the sum of new contacts from two sub-periods is one higher than the total new contacts for the combined full period.

2. Context & Details

* **Environment Conditions:**
  * Date of occurrence: 2025/10/14
  * The issue can be reproduced.
* **User Questions:**
  * Does unblocking a user and re-adding them via a Deeplink count them as a "New Contact"?
* **Reproduction Steps:**
  * Review the Deeplink performance report for the specified periods.
  * Compare the sum of "New Contacts" from sub-periods with the total for the full period.
* **Expected vs Actual Behavior:**
  * Expected: The sum of "New Contacts" from sub-periods should equal the total for the full period.
  * Actual: The sum from sub-periods is one higher than the total for the full period.

3. Root Cause & Solution

* **Root Cause:**
  * The discrepancy arises because a user who unblocks and re-adds via a Deeplink is identified as a "New Contact." At the time of LIFF authorization, if the user is in a blocked

state, the process_deep_link() method sends a NEW_FRIEND message. The aggregated period report counts unique "New Contacts" only once, while sub-period reports might capture a "New Contact" event for the same user if their unblock activity spans different sub-periods.
* **Solution:**
  * The behavior is by design, and no code fix is required. It is recommended to add a clarification regarding this behavior in the documentation to prevent future confusion.

***

Investigation of Deeplink Redirect Failure in Facebook Messenger

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-09-26
* **Asana Task ID:** [1211476033978693](https://app.asana.com/1/1184020052539844/task/1211476033978693)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Too costly

1. Issue Description

The MAAC deeplink URLs successfully redirect to LINE when placed on Facebook post walls. However, when these links are used in Facebook Messenger, they fail to load, displaying a "Cannot display this page" error.

2. Context & Details

* **Environment Conditions:**
  * MAAC organization ID: \[REDACTED]
  * CAAC organization ID: \[REDACTED]
  * Language: Traditional Chinese
  * Timezone: Asia/Taipei
  * Plan: Growth
  * Expiration Date: 2025/12/31
* **Reproduction Steps:**
  1. Place MAAC deeplink URL on a Facebook post wall.
  2. Click the link to verify successful redirection to LINE.
  3. Place the same URL in Facebook Messenger.
  4. Click the link in Messenger to observe the error.
* **Expected vs Actual Behavior:**
  * **Expected:** The deeplink should redirect to LINE in both Facebook post walls and Messenger.

* **Actual:** The deeplink redirects successfully from post walls but fails in Messenger, showing an error message.

3. Root Cause & Solution

* **Root Cause:** The issue arises because the MAAC deeplink functionality does not enforce opening in an external browser. Facebook Messenger's internal browser has strict security policies that block redirects from custom or unfamiliar domains.
* **Solution:** Implement a feature to force MAAC deeplinks to open in an external browser when accessed from platforms like Facebook Messenger. This task is currently prioritized in the MAAC development backlog for optimization.

***

Why Are Some Prize Names Not Displaying in MAAC Deeplink?

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-09-26
* **Asana Task ID:** [1211473650831117](https://app.asana.com/1/1184020052539844/task/1211473650831117)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Noel, Aaren
* **Result Breakdown:** Fix Problems

1. Issue Description

The client configured seven prizes in the prize management system. However, when selecting prize names in the deeplink settings, some prize names appeared while others did not. The client seeks to understand why certain prize names are missing.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 4294
  * MAAC bot: 3476
  * Happened time: 9/26
  * UUID: \[REDACTED_UUID]
* **User Questions:**
  * Why are some prize names not appearing in the deeplink settings?
* **Reproduction Steps:**
  1. Configure prizes in the prize management system.
  2. Set up deeplink with prize names.
  3. Observe that some prize names do not display.
* **Expected vs Actual Behavior:**

* Expected: All configured prize names should display in the deeplink.
  * Actual: Some prize names are missing, replaced by a generic placeholder.
* **Additional Information:**
  * The client confirmed that prize management settings were correct.
  * Screenshots provided for both displayed and non-displayed prize names.

3. Root Cause & Solution

* **Root Cause:**
  * Likely a frontend rendering issue related to specific characteristics of the prize name. The exact root cause is not consistently reproducible for further debugging.
* **Solution:**
  * An immediate fix was deployed to resolve the display issue and ensure the correct prize name is shown. Engineering should investigate further if this issue reoccurs to identify and implement a permanent frontend solution.
* **Status:**
  * Resolved.

***

Investigation of Message Delivery Failure in Customer Journey

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-09-19
* **Asana Task ID:** [1211405329420306](https://app.asana.com/1/1184020052539844/task/1211405329420306)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The customer reported that after scanning the deeplink, three LINE UIDs did not receive the expected messages.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 5563
  * Feature ID: Not specified
  * Reproduction: Not confirmed
* **User Questions:**
  * Why did the users not receive messages after scanning the deeplink?
* **Reproduction Steps:**

* Users scanned the deeplink but did not receive any messages.
* **Expected vs Actual Behavior:**
  * **Expected:** Users should receive messages after scanning the deeplink.
  * **Actual:** No messages were received by the users.

3. Root Cause & Solution

* **Root Cause:**
  * Investigation confirmed that the reported users had previously scanned the deeplink ID 953713 in July 2025. The MAAC platform's campaign logic correctly prevented re-sending welcome or new contact messages to users who had already triggered the specific deeplink.
* **Solution:**
  * No system bug was identified; the platform functioned as designed. The CSM has been provided with the user's deeplink scan history to explain the behavior to the client. Communicate to the client that messages were not sent because the users had previously interacted with the deeplink.

***

Investigation of Archived Deep Link Content Display for New Friends

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-09-16
* **Asana Task ID:**
[1211368444546388](https://app.asana.com/1/1184020052539844/task/1211368444546388)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

Two new friends added to the client's Official Account received content from an archived deep link template. The client inquired why the archived content was still appearing and how to verify the source from which these users joined.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 5913
  * MAAC bot: 4775
  * CAAC org ID: 2676
  * Happened between: 9/12 - 9/13
* **User Questions:**
  * Why is the archived deep link content still active?

* How can the source of user addition be verified?
* **Reproduction Steps:**
  * The issue cannot be reproduced as current deep links do not display the archived template content.
* **Expected vs Actual Behavior:**
  * Expected: Archived deep link content should not be active.
  * Actual: Archived deep link content was received by new users.
* **Additional Information:**
  * Archived deep link name: "導流連結 - 範本" (<https://maac.io/3xSK0>)
  * User IDs involved: \[REDACTED], \[REDACTED]

3. Root Cause & Solution

* **Root Cause:**
  * The system design allows archived deep links to remain active and clickable. Data confirmed that the two users clicked the specific deep link around their join time, indicating it was still exposed externally.
* **Solution:**
  * This behavior is consistent with system design expectations. The client has been advised to either modify the content of the archived deep link or remove its external exposure. For future improvements, consider implementing a true disable/delete function for deep links or enhancing clarity on the behavior of archived links.

***

Investigation of Message Delivery Failure in Customer Journey

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-09-16
* **Asana Task ID:** [1211368348898205](https://app.asana.com/1/1184020052539844/task/1211368348898205)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

An existing contact did not receive the configured message after initially scanning a specific deeplink. The contact's LINE UID: \[REDACTED_ID] \[REDACTED], and the MAAC ID: \[REDACTED_ID] \[REDACTED]. The client reported that the user insisted this was their first scan of the deeplink, expecting to receive the message.

2. Context & Details

* **Client Information:**
  * MAAC org ID: 5563
  * MAAC bot/channel ID: \[REDACTED]
* **Feature Information:**
  * Incident occurred on: 2025/09/16 11:40
  * Deeplink name: "來源-2025 臺法文化工作坊"
* **Reproduction Steps:**
  * The issue cannot be reproduced; it appears to be an isolated case.
* **Expected vs Actual Behavior:**
  * Expected: The contact should receive a message upon scanning the deeplink.
  * Actual: No message was received by the contact.
* **Additional Information:**
  * The user clicked the deeplink multiple times between September 5th and September 16th, 2025.
  * Tags were successfully applied during these interactions.

3. Root Cause & Solution

* **Root Cause:**
  * The "existing contact message" feature for the deeplink was enabled on September 16th, 2025, at 08:52. All previous interactions by the user occurred before this time. The message setting was configured as non-repeatable, preventing retrospective message delivery.
* **Solution:**
  * Ensure the "existing contact message" feature is enabled before expecting message delivery. Consider configuring the message setting to allow repeatable delivery if retrospective messaging is required.

***

Investigation of Android Incompatibility with MAAC Referral Link

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-09-15
* **Asana Task ID:** [1211356153706723](https://app.asana.com/1/1184020052539844/task/1211356153706723)
* **Ticket Priority:** P2
* **Client Name:** 酷遊天國際旅行社股份有限公司-KKday
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

KKday reported that their MAAC referral link (<https://maac.io/4EIIB>) failed to open on Android devices, while it functioned correctly on iOS devices.

2. Context & Details

* **Environment Conditions:**
  * iOS devices: Link opens normally.
  * Android devices: Link fails to open when embedded in third-party applications.
* **User Questions:**
  * Is the issue caused by system differences between iOS and Android?
* **Reproduction Steps:**
  * Embed the MAAC referral link within a third-party application.
  * Attempt to open the link on an Android device.
* **Expected vs Actual Behavior:**
  * Expected: Link should open normally on both iOS and Android devices.
  * Actual: Link opens on iOS but fails on Android when accessed through a third-party application.

3. Root Cause & Solution

* **Root Cause:** The issue is an interaction problem between a third-party application and the Android operating system, not a fault of the MAAC platform or the referral link itself.
* **Solution:** No action is required from MAAC Product or Engineering. It is recommended that the customer investigates how their external application handles link opening on Android devices.
* **Status:** Closed

***

Investigation of Deeplink Functionality in TikTok Ads

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-09-09
* **Asana Task ID:** [1211292942830085](https://app.asana.com/1/1184020052539844/task/1211292942830085)
* **Ticket Priority:** P2
* **Client Name:** Krungsri Auto
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client integrated a Deeplink into TikTok ads, but upon clicking the link, it does not directly navigate to the add friend page. Instead, users must click "back to LINE" to reach the

intended page. The client inquired whether this is a limitation of the TikTok app or an issue with our system.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 5443
  * MAAC bot ID: 4329
* **Reproduction Steps:**
  * Place a Deeplink in TikTok ads.
  * Click the link within the TikTok app.
  * Observe that it does not directly open the add friend page.
* **User Questions:**
  * Is this behavior a limitation of the TikTok app?
  * Is there an issue with our Deeplink functionality?
* **Expected vs Actual Behavior:**
  * **Expected:** Clicking the Deeplink should directly open the LINE add friend page.
  * **Actual:** Users are directed to an in-app browser and must manually navigate back to LINE.

3. Root Cause & Solution

* **Root Cause:**
  * The behavior is attributed to TikTok's in-app browser mechanism. TikTok's in-app browser opens LINE Universal Links within itself, which prevents direct launching of the LINE app. This is a limitation of TikTok's platform and not an issue with the MAAC Deeplink functionality.
* **Solution:**
  * No engineering changes are required for the Deeplink.
  * Suggested workarounds for clients:
    1. Advise users to open the link in an external browser by tapping "..." in the TikTok in-app browser.
    2. Provide clear instructions within the ad to guide users on how to navigate back to LINE.

***

Investigation of Message Delivery Failure in Customer Journey

Metadata

* **Feature:** MAAC-Deeplink
* **Created At:** 2025-08-28
* **Asana Task ID:** [1211168364860701](https://app.asana.com/1/1184020052539844/task/1211168364860701)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy

* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported that a user who clicked a MAAC deep link and was subsequently tagged did not receive the expected message from the associated campaign. The client confirmed the user had clicked the deep link.

2. Context & Details

* **Environment:**
  * The client is running an on-site campaign using a deep link configured in MAAC.
  * The affected user was tagged with "2508 宝箱_300pt" after clicking the deep link.
* **User Questions:**
  * Why did the tagged user not receive the message?
* **Reproduction Steps:**
  1. User clicks on the MAAC deep link.
  2. User is tagged within the campaign.
  3. Expected message is not received by the user.
* **Expected vs Actual Behavior:**
  * **Expected:** The tagged user should receive the "Existing contacts message" from the campaign.
  * **Actual:** The user did not receive the message despite being tagged.

3. Root Cause & Solution

* **Root Cause:**
  * The investigation revealed that the message scheduled for the affected user failed to send due to the client's MAAC account exceeding its monthly message sending limit.
* **Solution:**
  * The issue was identified as a result of the client's monthly message quota being exceeded, not a product defect. The client has been informed of the specific reason for the message delivery failure. No engineering changes or product fixes are required. Clients should monitor their message sending limits to prevent future occurrences.

Smart redirect tool

Feature Overview

System Design

Product Specifications

Troubleshooting & FAQ

Tracelink

Feature Overview

System Design

Product Specifications

Troubleshooting & FAQ

tracelink_asana_history_knowledge_base_final

Investigation of ID Binding Failure via CLID in MAAC Tracelink

Metadata

* **Feature:** MAAC-Tracelink
* **Created At:** 2026-01-30
* **Asana Task ID:** [1213035004023033](https://app.asana.com/1/1184020052539844/task/1213035004023033)
* **Ticket Priority:** P3
* **Client Name:** ホテラバ
* **Resolution Owner:** N/A
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

When a user navigates to the URL via the tracking link (maac.io) set in the Rich Menu, the CLID is not appended. Consequently, the UID is not being bound to the Customer ID in their CRM system. However, when opening a URL with the CLID parameter manually appended directly in the browser, the ID binding completes successfully.

2. Context & Details

* **Environment Conditions:**
  * MAAC org id: 80
  * MAAC bot: 79

* Channel Type: LINE
  * Affected contact id: \[REDACTED_ID]
  * MAAC ID: \[REDACTED_ID]
  * Richmenu name: \[Richmenu URL]
  * Tracelink name: \[Tracelink URL]
  * URL: \[REDACTED_URL]
* **Reproduction Steps:**
  * Navigate to the URL via the tracking link in the Rich Menu.
  * Observe that the CLID is not appended.
  * Manually append the CLID parameter in the browser and observe successful ID binding.
* **Expected vs Actual Behavior:**
  * **Expected:** CLID should be appended automatically when navigating via the tracking link, allowing UID to bind with the Customer ID.
  * **Actual:** CLID is not appended, preventing the binding process.

3. Root Cause & Solution

* **Root Cause:** CLID tracking for bot 79 (MAAC ID: \[REDACTED_ID] was disabled in system settings.
* **Solution:** CLID tracking for bot 79 was enabled in the Django admin. Customer Success Managers (CSMs) should refer to the CLID Standard Operating Procedure (SOP) and use Metabase's "Debug Liff Redirect view" for future investigations. The issue is now resolved.

***

Investigation of Tracelink Redirection to Welcome Message

Metadata

* **Feature:** MAAC-Tracelink
* **Created At:** 2026-01-09
* **Asana Task ID:**
[1212716056060047](https://app.asana.com/1/1184020052539844/task/1212716056060047)
* **Ticket Priority:** P4
* **Client Name:** N/A
* **Resolution Owner:** Tracy
* **Result Breakdown:** Limit information

1. Issue Description

The unexpected situation involves a broadcast link that, when clicked, redirects to a welcome message instead of the expected content. This issue was confirmed during customer service testing.

2. Context & Details

* **Environment:**

* Broadcast URL: \[<https://maac.cresclab.com/broadcast/line/\\[REDACTED_PATH>]
* **Reproduction Steps:**
  * Click on the final image in the broadcast.
  * Observe the redirection to a welcome message.
* **Expected vs Actual Behavior:**
  * **Expected:** Clicking the image should lead to the intended content.
  * **Actual:** Clicking the image leads to a welcome message.
* **Additional Information:**
  * The issue was reproducible during internal testing.
  * No specific user identifiers or detailed user flow were provided.

3. Root Cause & Solution

* **Root Cause:**
  * The root cause cannot be determined due to insufficient information. The issue may be related to system design or a bug, but further details are required.
* **Solution:**
  * The engineering team requires detailed reproduction steps and specific user identifiers to investigate further. The ticket has been closed pending additional information from the customer.

***

Investigation of LIFF Opening Failure Due to External Redirect

Metadata

* **Feature:** MAAC-Tracelink
* **Created At:** 2025-12-17
* **Asana Task ID:**
[1212486166756322](https://app.asana.com/1/1184020052539844/task/1212486166756322)
* **Ticket Priority:** P3
* **Client Name:** Louis vuitton
* **Resolution Owner:** Noel
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The customer reported that despite disabling the "redirect to external browser" setting, a MAAC short URL intended to open a LIFF was still redirecting to an external browser on an iPhone 13, causing the LIFF to fail to open.

2. Context & Details

* **Environment:**
  * Device: iPhone 13
  * LINE Version: 15.20.4

* **Reproduction Steps:**
  * The customer accessed the MAAC short URL: `https://maac.io/52vza`.
  * The URL redirected to an external browser instead of opening the LIFF.
* **Expected vs Actual Behavior:**
  * **Expected:** The LIFF should open within the LINE app.
  * **Actual:** The URL redirected to an external browser, and the LIFF failed to open.
* **Additional Information:**
  * The issue was intermittent and could not be consistently reproduced by internal teams.
  * Customer Success (CS) was able to open the link without issues.

3. Root Cause & Solution

* **Root Cause:**
  * The issue could not be reproduced by internal Product Ops, Customer Success, or Engineering teams. It is suspected to be caused by a client-side specific local cache or a transient device state.
* **Solution:**
  * The customer was advised to clear the cache of their LINE application. This resolved the issue, and no further action or code changes were necessary.

***

Investigation of Incorrect URL Generation in MAAC-Tracelink

Metadata

* **Feature:** MAAC-Tracelink
* **Created At:** 2025-12-15
* **Asana Task ID:**
[1212440779412548](https://app.asana.com/1/1184020052539844/task/1212440779412548)
* **Ticket Priority:** P4
* **Client Name:** Buty99
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client reported that during the period of 12/09 from 18:00 to 18:30, they created three URLs containing UTM parameters. However, instead of receiving newly generated URLs, they were provided with previously created URLs. The discrepancy was noted in the `utm_campaign` parameter. Specifically, the client attempted to create a URL with `utm_campaign=PUSH_20251209` but received a URL with `utm_campaign=PUSH20251110`, which was created in November.

2. Context & Details

* **Environment Conditions:**

* Date of issue: 12/09
  * Time of issue: 18:00 to 18:30
  * URLs involved contained UTM parameters.
* **User Questions:**
  * Can the logs confirm if the `utm_campaign=PUSH_20251209` link was correctly generated and displayed?
* **Reproduction Steps:**
  * Attempt to create a URL with a specific `utm_campaign` parameter.
  * Observe if the generated URL matches the expected campaign parameter.
* **Expected vs Actual Behavior:**
  * **Expected:** A new URL with `utm_campaign=PUSH_20251209` should be generated.
  * **Actual:** A URL with `utm_campaign=PUSH20251110` was received instead.

3. Root Cause & Solution

* **Root Cause:**
  * The root cause is currently undetermined due to the inability to verify the client's operation records. There is uncertainty whether the issue is due to a system design flaw or a bug. The logs do not provide sufficient evidence to confirm the client's report.
* **Solution:**
  * Inform the client that no matching records were found in the MAAC system for the reported timeframe.
  * Request the client to verify the platform and details of their operations.
  * Develop a comprehensive audit log investigation playbook to assist in future verifications.

***

Why Can't Users Open MAAC Deeplinks from Facebook Posts?

Metadata

* **Feature:** MAAC-Tracelink
* **Created At:** 2025-11-18
* **Asana Task ID:**
[1211978338514071](https://app.asana.com/1/1184020052539844/task/1211978338514071)
* **Ticket Priority:** P2
* **Client Name:** N/A
* **Resolution Owner:** N/A
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

An Android user reported an inability to open a provided link. The user attached a screenshot showing the result after tapping the link.

2. Context & Details

* **Environment:** Android device
* **Reproduction Steps:**
  * User attempts to open a MAAC deeplink shared in a Facebook post.
* **Expected Behavior:** The link should open and function as intended.
* **Actual Behavior:** The link does not open or behave as expected.
* **Additional Information:**
  * URL involved: <https://maac.io/4SQB>
  * The same link was used in a Facebook post and broadcast.

3. Root Cause & Solution

* **Root Cause:** The MAAC deeplinks were functioning as designed. The issue arose from the customer's misunderstanding of the deeplink functionality and its intended behavior. No technical defect was identified.
* **Solution:** The misunderstanding has been clarified. No product or engineering action is required for this specific incident. It is suggested to review user documentation for MAAC deeplinks to enhance clarity, especially regarding their use and expected behavior on external social media platforms.

***

Investigation of Reauthorization Process for Existing LINE Users in MAAC Tracelink

Metadata

* **Feature:** MAAC-Tracelink
* **Created At:** 2025-11-05
* **Asana Task ID:** [1211847487255320](https://app.asana.com/1/1184020052539844/task/1211847487255320)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Task-Ticket

1. Issue Description

The MAAC tracelink mechanism does not prompt existing LINE users to reauthorize the LIFF page, preventing the collection of updated data such as phone numbers. This affects approximately 1.83 million contacts that the client wishes to target through MAAC Reach.

2. Context & Details

* **Environment Conditions:**
  * MAAC org id: 3521
  * MAAC bot: 2964
  * UU ID: \[REDACTED_UUID]
* **User Questions:**

* Is there a mechanism to enable a cookie feature that allows each friend to pass through the authorization page again upon clicking the tracelink?
* **Reproduction Steps:**
  1. Existing LINE users click on the tracelink.
  2. Users are not redirected to the LIFF authorization page due to existing cookie checks.
* **Expected vs Actual Behavior:**
  * **Expected:** Users should be redirected to the LIFF authorization page to update their data.
  * **Actual:** Users are not redirected, and their data remains outdated.

3. Root Cause & Solution

* **Root Cause:** The internal cookie check within the MAAC tracelink mechanism prevents previously authorized users from being redirected to the LINE LIFF authorization page.
* **Solution:**
  * **Option 1 (Customization):** Implement a feature flag to temporarily bypass the cookie check, forcing LIFF re-authorization. This is recommended for short-term use.
  * **Option 2 (Alternative):** Utilize a MAAC game module, which naturally bypasses the cookie check.

The client is currently evaluating these solutions and their associated costs.

***

Investigation of Inconsistent Page Redirection in MAAC Rich Menu

Metadata

* **Feature:** MAAC-Tracelink
* **Created At:** 2025-10-22
* **Asana Task ID:** [1211713182842659](https://app.asana.com/1/1184020052539844/task/1211713182842659)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The MAAC rich menu contains two cells configured with the same TraceLink URL, yet they redirect to different final pages. Specifically, the 8th cell redirects to the homepage, while the 2nd cell redirects to the product page, which is the expected behavior.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 479

* MAAC bot: 460
* **User Questions:**
  * Why do the two cells with the same URL lead to different pages?
* **Reproduction Steps:**
  * Access the rich menu with the specified TraceLink URL in both the 8th and 2nd cells.
  * Observe the redirection behavior.
* **Expected vs Actual Behavior:**
  * Expected: Both cells should redirect to the product page.
  * Actual: The 8th cell redirects to the homepage, while the 2nd cell redirects to the product page.

3. Root Cause & Solution

* **Root Cause:**
  * The TraceLink URL (<https://maac.io/4Kh26>) correctly redirects to the client's configured URL. The discrepancy arises from the client's landing page logic, which redirects users to different content based on internal conditions such as user status or cookies.
* **Solution:**
  * There is no issue with the MAAC platform. The client should investigate their landing page's redirect logic to ensure consistent behavior for the intended TraceLink.

***

Investigation of Safari Incompatibility with MAAC Tracking Links on iOS

Metadata

* **Feature:** MAAC-Tracelink
* **Created At:** 2025-09-17
* **Asana Task ID:**
[1211379820597016](https://app.asana.com/1/1184020052539844/task/1211379820597016)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Not our issue

1. Issue Description

The issue involves iPhone users who are unable to open web pages via MAAC tracking links embedded in LINE rich menus when using Safari. This problem has been reported consistently over the past week, with more than five instances noted. The issue appears to have emerged following recent iOS updates.

2. Context & Details

* **Environment Conditions:**
  * iPhone users on iOS 18.7

* Safari browser used for accessing links
* **User Questions:**
  * Why are the tracking links not opening in Safari?
* **Reproduction Steps:**
  1. Click on the MAAC tracking link in the LINE rich menu.
  2. Attempt to open the link using Safari.
* **Expected vs Actual Behavior:**
  * **Expected:** The web page should load successfully.
  * **Actual:** Safari displays an infinite loading spinner without displaying the destination page.

3. Root Cause & Solution

* **Root Cause:**
  * The issue is suspected to be an incompatibility between Safari on iOS 18.7 and MAAC's redirect mechanism. It may also involve the client's specific landing page components when accessed via MAAC redirect in Safari. This is identified as a recent regression.
* **Solution:**
  * Engineering is required to investigate the behavior of MAAC's redirect in Safari on iOS 18.7. The investigation should determine if the issue is due to MAAC's redirect process, the client's landing page compatibility with Safari, or a combination of both. This issue should be prioritized for an urgent fix.

Prize Management

Feature Overview

System Design

Product Specifications

Troubleshooting & FAQ

prize_asana_history_knowledge_base_final

How to Resolve Inconsistent File Size Limit Display in Prize Management

Metadata

* **Feature:** MAAC-Prize management
* **Created At:** 2026-01-16

* **Asana Task ID:** [1212835062606954](https://app.asana.com/1/1184020052539844/task/1212835062606954)
* **Ticket Priority:** P4
* **Client Name:** N/A
* **Resolution Owner:** N/A
* **Result Breakdown:** N/A

1. Issue Description

The file size limit description for image settings in the Prize Management section displays inconsistently across different languages. The limit should be uniformly set to 1MB, but some languages incorrectly show a 20MB limit.

2. Context & Details

* **Environment Conditions:**
  * MAAC > Prize Management > Coupon Style > Card Message > Image settings
* **User Questions:**
  * Why is the file size limit displayed differently in various languages?
* **Reproduction Steps:**
  * Navigate to the Prize Management section.
  * Check the file size limit description in different language settings.
* **Expected vs Actual Behavior:**
  * **Expected:** All languages should display a file size limit of 1MB.
  * **Actual:**
    * ZH (Chinese): Displays < 1MB (Correct)
    * EN (English): Displays < 1MB (Correct)
    * TH (Thai): Displays < 20MB (Incorrect)
    * JP (Japanese): Displays < 20MB (Incorrect)

3. Root Cause & Solution

* **Root Cause:** The issue was due to an outdated or missing translation entry for specific UI text strings in the Thai and Japanese language settings.
* **Solution:** The incorrect translations were identified and updated with the correct copy. The fix has been deployed to production. It is recommended to review and enhance localization processes for new or modified UI texts to prevent similar issues in the future.

***

Investigation of Prize Management Editing Issue

Metadata

* **Feature:** MAAC-Prize management
* **Created At:** 2026-01-16

* **Asana Task ID:**
[1212834391682490](https://app.asana.com/1/1184020052539844/task/1212834391682490
)
* **Ticket Priority:** P1 - Very High
* **Client Name:** N/A
* **Resolution Owner:** Jack Lee
* **Result Breakdown:** Fix Problems

1. Issue Description

Customers reported an issue where unexpired prizes could not be edited due to the absence
of the edit icon in the user interface.

2. Context & Details

* **Environment Conditions:**
  * Occurred on January 16.
  * Affected MAAC organization ID: 5722.
  * Affected MAAC bot/channel ID: 4619.
* **User Questions:**
  * Why is the edit icon missing for unexpired prizes?
* **Reproduction Steps:**
  * Attempt to edit unexpired prizes in the prize management interface.
  * Observe the absence of the edit icon.
* **Expected vs Actual Behavior:**
  * **Expected:** The edit icon should be present and functional for unexpired prizes.
  * **Actual:** The edit icon is missing, preventing edits.

3. Root Cause & Solution

* **Root Cause:** A recent code deployment introduced a regression that caused the edit
functionality/icon for unexpired prizes to disappear.
* **Solution:** The edit functionality/icon has been restored and deployed to the production
environment.

***

Investigation of "Limit Reached" Message and Prize Non-receipt in MAAC Lottery Poetry

Metadata

* **Feature:** MAAC-Prize management
* **Created At:** 2026-01-09
* **Asana Task ID:**
[1212713603195744](https://app.asana.com/1/1184020052539844/task/1212713603195744
)
* **Ticket Priority:** P2

* **Client Name:** ホテラバ
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

A user reported encountering a "Limit reached" message and was unable to complete the Lottery poetry flow or receive a prize. The user pressed the "Receive" button multiple times, but the process did not complete and returned to the same screen, suggesting the game may have been played without successfully granting a prize.

2. Context & Details

* **Environment:**
  * MAAC org ID: 80
  * MAAC bot ID: 79
  * Feature ID: l8qO3Dq7
* **User Actions:**
  * User pressed the "Receive" button multiple times.
* **Reproduction Steps:**
  * Issue could not be reproduced on Android devices.
* **Expected vs Actual Behavior:**
  * Expected: User receives a prize upon completing the game.
  * Actual: User did not receive a prize, and the system displayed a "Limit reached" message.
* **Prize Report Check:**
  * Affected UID: \[REDACTED]

  * No prize records found for the user in the 2026 年☆ホテラバおみくじ campaign.

3. Root Cause & Solution

* **Root Cause:**
  * System Design: Game logs confirm the user did not win a prize, likely due to insufficient or depleted prizes in the campaign. The current UI lacks clear communication regarding the "no prize" status, leading to user confusion.
* **Solution:**
  * No system action is required for the affected user as logs confirm "no prize" status.
  * The product team is enhancing the UI to clearly display "unowned prize" information, scheduled for release this month, to prevent similar confusion in the future.

***

Why Did the System Trigger a Low Stock Alert for Prize ID 38798?

Metadata

* **Feature:** MAAC-Prize management
* **Created At:** 2026-01-05

* **Asana Task ID:** [1212652484063147](https://app.asana.com/1/1184020052539844/task/1212652484063147)
* **Ticket Priority:** P2
* **Client Name:** iPair
* **Resolution Owner:** Aaren
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

The client received a low stock alert for prize ID 38798, despite the current inventory being greater than 200 units.

2. Context & Details

* **Environment Conditions:**
  * Prize ID: 38798
  * Prize Name: New Year Luck Slot - Universal Badge
  * Inventory threshold set for alerts: below 100 units
  * Current inventory displayed: greater than 200 units
* **User Questions:**
  * Why was a low stock alert triggered when inventory is above the threshold?
* **Reproduction Steps:**
  1. Set a low stock alert threshold for prize inventory below 100 units.
  2. Monitor inventory levels for prize ID 38798.
  3. Observe alert triggered despite inventory being above 200 units.
* **Expected vs Actual Behavior:**
  * **Expected:** No alert should be triggered as inventory is above the threshold.
  * **Actual:** Alert was triggered, causing confusion for the client.

3. Root Cause & Solution

* **Root Cause:**
  * The alert system is designed to trigger based on the quantity of PrizeStatus.UNOWNED (unassigned) prizes falling below the threshold of 100. For prize ID 38798, the UNOWNED quantity was 0, which correctly triggered the alert. The client was confused because the MAAC UI only displays the count of "received" prizes, not the unassigned ones.
* **Solution:**
  * The system functioned as intended; there is no bug. The client indeed has zero UNOWNED prizes, which is why the alert was triggered. It is advised to replenish the inventory. Additionally, a UI enhancement is suggested to display both UNOWNED and OWNED counts to improve clarity for users.

***

Investigation of Incorrect Localization in Prize Status Label

Metadata

* **Feature:** MAAC-Prize management
* **Created At:** 2025-12-24
* **Asana Task ID:** [1212577017707300](https://app.asana.com/1/1184020052539844/task/1212577017707300)
* **Ticket Priority:** P4
* **Client Name:** IHG
* **Resolution Owner:** Jack Lee
* **Result Breakdown:** Fix Problems

1. Issue Description

The label in the prize report displayed incorrectly in the Thai Language UI. The expected label in English is "Claimed," which should be translated to "เก็บแล้ว" in Thai. However, the current Thai UI uses "ผู้ติดต่อ," meaning "Contact."

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 5938
  * MAAC bot/CAAC channel ID: 4796
* **Reproduction Steps:**
  * Access the prize report in the Thai Language UI.
  * Observe the label for claimed prizes.
* **Expected vs Actual Behavior:**
  * **Expected:** The label should read "เก็บแล้ว" (claimed) in Thai.
  * **Actual:** The label reads "ผู้ติดต่อ" (contact) instead.
* **Additional Information:**
  * The issue can be reproduced consistently.
  * Relevant screenshots and screen records are available:
    * [Screenshot 1](https://app.asana.com/app/asana/-/get_asset?asset_id=1212577017707313)
    * [Screenshot 2](https://app.asana.com/app/asana/-/get_asset?asset_id=1212577017707315)

3. Root Cause & Solution

* **Root Cause:** An incorrect localization string was present in the product's Thai language files for the "claim" action related to prizes.
* **Solution:** The incorrect Thai translation has been updated to "เก็บแล้ว" (claimed). No further action is required at this time. The issue is now resolved.

***

Investigation of Repeated Prize Redemption in JCB Event

Metadata

* **Feature:** MAAC-Prize management
* **Created At:** 2025-11-26
* **Asana Task ID:**
[1212148507497017](https://app.asana.com/1/1184020052539844/task/1212148507497017)
* **Ticket Priority:** P2
* **Client Name:** JCB
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

JCB conducted a credit card receipt lottery event where users could upload their JCB credit card receipts to enter a draw. The prizes were set in the backend as LINE POINTS of 50 and 10 points. Within a few minutes, a large number of prizes were claimed, indicating an issue with repeated prize redemption.

2. Context & Details

* **Event Start:** Large number of prize claims began on 11/17.
* **User Process:**
  1. Open LIFF interface.
  2. Enter form details and upload receipt image.
  3. Backend recognition.
  4. Backend confirmation allows submission.
  5. User submits.
  6. Backend conducts draw and distributes prizes.
* **System Records:** Multiple UIDs showed prize claims without corresponding receipt records.
  * **50 Points UIDs:** \[REDACTED]
  * **10 Points UIDs:** \[REDACTED]
* **Previous Mechanism:** Initially used a message template with a roulette system, which was changed after the LIFF link was shared, allowing unauthorized users to participate and claim prizes.
* **Push API Details:**
  * URL: `https://api.cresclab.com/openapi/v1/direct_message/push/`
  * Header: `Authorization: Bearer {CRESCLAB_API_KEY}`
  * Body: `template_id` for message template ID, varies weekly.

3. Root Cause & Solution

Root Cause: The client's system logic incorrectly assessed prize eligibility and API call frequency, resulting in repeated API calls to MAAC's message sending service for individual users. MAAC processed these requests as received.

Solution: The issue is within the client's internal system. The client needs to revise their prize distribution logic to prevent duplicate API calls. No changes are required on the MAAC side.

Status: Investigation concluded. Awaiting client's internal action.

***

Investigation of Unresponsive Redemption Voucher Click in MAAC-Prize Management

Metadata

* **Feature:** MAAC-Prize management
* **Created At:** 2025-10-02
* **Asana Task ID:** [1211530080882418](https://app.asana.com/1/1184020052539844/task/1211530080882418)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Tracy
* **Result Breakdown:** Clarify (Meet product expectation)

1. Issue Description

An end-user reported an unresponsive page when attempting to click a redemption voucher for LINE Points in the MAAC capsule machine. The page remained static, leading to a customer complaint.

2. Context & Details

* **Environment Conditions:**
  * MAAC Organization ID: 1793
  * MAAC Bot ID: 1453
  * Occurrence Date: 10/2
  * UUID: \[REDACTED_UUID]
  * Screenshot provided: [Link to asset](https://app.asana.com/app/asana/-/get_asset?asset_id=1211530080882432)
* **User Questions:**
  * The user questioned why the voucher click resulted in no response.
* **Reproduction Steps:**
  * The issue could not be reproduced by the Customer Success Manager (CSM). Attempts to redeem were successful on their end.
* **Expected vs Actual Behavior:**
  * **Expected:** Clicking the voucher should lead to a successful redemption process.

* **Actual:** The page remained unresponsive, and the user was unable to proceed with the redemption.

3. Root Cause & Solution

* **Root Cause:**
  * The root cause remains undetermined as the issue could not be reproduced by the CSM. The specific reason for the redemption failure is unknown due to the lack of user-side data.
* **Solution:**
  * A direct redemption link was provided as a temporary workaround.
  * Further investigation requires a complete screen recording from the end-user to identify the issue.
  * It is noted that the "claimed" status in MAAC does not confirm successful redemption of LINE Points.

Investigation is currently paused, pending resolution through the workaround or additional evidence from the customer.

***

Investigation of Prize Stock Alert Notifications Despite High Inventory Levels

Metadata

* **Feature:** MAAC-Prize management
* **Created At:** 2025-09-10
* **Asana Task ID:** [1211310614292818](https://app.asana.com/1/1184020052539844/task/1211310614292818)
* **Ticket Priority:** P2
* **Client Name:** \[REDACTED]
* **Resolution Owner:** Yio
* **Result Breakdown:** Fix Problems

1. Issue Description

Customers received notifications indicating that prize stock levels were low or at zero immediately after creating prize settings and uploading prizes. This occurred despite the MAAC UI displaying a high quantity of prizes available and none being claimed.

2. Context & Details

* **Environment:** The issue was reported by Cosmed and another brand, iPair.
* **Reproduction Steps:**
  * Prize settings were created and a large quantity of prizes was uploaded.
  * Notifications of low or zero stock were received shortly after.
* **Expected Behavior:** Notifications should only be sent when the prize stock is genuinely low or depleted.

* **Actual Behavior:** Notifications were sent erroneously, indicating low or zero stock despite high inventory levels.

3. Root Cause & Solution

* **Root Cause:** The system's prize stock check job was running too frequently in relation to the asynchronous prize import process. While prize settings are created instantly, individual prize units are imported in the background. The stock check job could execute after the setting was active but before all associated prizes were fully imported and available, leading to false low/zero stock alerts.
* **Solution:** A short-term fix has been deployed to adjust the timing of the stock check job. Further adjustments may be necessary to ensure synchronization between prize import completion and stock checks.

***

Investigation of Prize Delivery Failure in Rapid Referral Campaign

Metadata

* **Feature:** MAAC-Prize management
* **Created At:** 2025-09-05
* **Asana Task ID:** [1211256941142756](https://app.asana.com/1/1184020052539844/task/1211256941142756)
* **Ticket Priority:** P1 - Very High
* **Client Name:** NA Bakery
* **Resolution Owner:** Jack Lee
* **Result Breakdown:** Fix Problems

1. Issue Description

During a live demonstration, a client successfully invited a contact and was eligible to redeem an IceCream prize (Brand Coupon type). However, upon clicking "Redeem" on the event page, the coupon was not sent. The client inquired whether this issue was specific to the 'Brand Coupon' type or affected all prize types, as previous attempts with standard coupons were successful.

2. Context & Details

* **Environment Conditions:**
  * MAAC org ID: 6016
  * MAAC bot/channel ID: 5320
* **Reproduction Steps:**
  1. Set up a referral campaign with the IceCream prize as a Brand Coupon.
  2. Invite one contact to qualify for redemption.
  3. Click "Redeem" after the successful invite.
* **Expected vs Actual Behavior:**

* **Expected:** The IceCream prize should be sent immediately after redemption.
  * **Actual:** The prize was not triggered upon redemption. It was observed that the prize could be sent via Auto Reply but not through the Rapid Referral campaign.
* **Additional Information:**
  * The issue was reproducible under the described conditions.
  * Screenshots and screen records were provided to illustrate the sequence of events.

3. Root Cause & Solution

* **Root Cause:** The prize message template for Rapid Referral campaigns incorrectly included an empty 'hero' section (missing image URL and aspect ratio) when no image was uploaded. This caused a validation error with the LINE Flex Message API. Unlike Auto-reply or Broadcast features, the Rapid Referral flow did not remove this invalid 'hero' section.
* **Solution:** The engineering team implemented a fix to ensure the 'hero' section is correctly removed from prize message templates in Rapid Referral campaigns when no image is present. This adjustment resolves the validation error and allows prizes to be sent as expected.

Customer Journey

##

System Design

Design docs for MAAC Customer Journey system architecture, integrations, performance, and API design.

This section stores **system design** documents for **MAAC Customer Journey**.

Use it when you need the **architecture**, **integration contracts**, **API shapes**, or **performance rationale** behind a change.

{% hint style="info" %}
Search keywords: customer journey, MAAC, architecture, system design, EDM, email, token exchange, SendGrid, sender domain, sender profile, CDH tag, tag source, node performance, report API, performance optimization
{% endhint %}

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* [202510 EDM (Email) in Customer Journey — Architecture, Token Exchange, and API Design](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202510-edm-email-in-customer-journey-architecture-token-exchange-and-api-design)

* [202510 EDM in Journey onboaring contact management_](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202510-edm-in-journey-onboaring-contact-management_)
* [202510 EDM in Journey onboaring (admin center)](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202510-edm-in-journey-onboaring-admin-center)
* [202410 CDH tag journey rule](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202410-cdh-tag-journey-rule)
* [20250619 Journey node performance](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/20250619-journey-node-performance)
* [202407 MAAC Performance Optimization](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202407-maac-performance-optimization)
* [202302 Journey Architecture & Design](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202302-journey-architecture-and-design)
* [202302 Customer Journey FE Scoping](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202302-customer-journey-fe-scoping)

202510 EDM (Email) in Customer Journey — Architecture, Token Exchange, and API Design

System design for EDM/Email actions in Customer Journey (MAAC + Email Extension + MDS). Covers boundaries, token exchange, campaign CRUD, message build/send flow, and key APIs.

Overview

This doc covers **EDM (Email) sending inside Customer Journey**. It describes the **Journey email action node** design across **MAAC**, **Email Extension service (Epistola)**, and **MDS**. It also documents **token exchange**, **campaign CRUD APIs**, and the **message build + send flow**.

{% hint style="info" %}
Keywords: EDM, email, Customer Journey, Journey node, action node, MAAC, MDS, Rubato, Email Extension, iframe editor, token exchange, JWT, SendGrid
{% endhint %}

Related docs

* Email onboarding APIs
  * [202510 EDM in Journey onboaring contact management_](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202510-edm-in-journey-onboaring-contact-management_)

* [202510 EDM in Journey onboaring (admin center)](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202510-edm-in-journey-onboaring-admin-center)
* Tag trigger rule changes (often touches identity + tag source)
  * [202410 CDH tag journey rule](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202410-cdh-tag-journey-rule)

***

Action node v2 boundary (EDM / Email in Journey)

MAAC

* journey
  * Journey graph 管理與渲染

  * Member progress 在節點間的移動

  * Progress 狀態改變（READY/RUNNING/WAITING/ENDED）

  * 呼叫 Email Extension / email service 發送訊息

  * 接收 webhook forward 取得發送結果（via MDS）

  * 儲存 MAAC metadata（channel 也在 MAAC）

  * 儲存 channel raw message（Email content / template metadata）
* member
  * Member API for outsource (PII / member profile)
* access management
  * Generate token for iframe (短效 token / exchange token)

Email Extension service

* iframe editor FE (drag-and-drop / HTML editor)
* Node configuration
  * raw message verification
  * message preview
* Build message
  * member + message → personalized built message

MDS

* Channel adaptor for sending
* Channel webhook processing + forward

***

Design notes

Design & discussion

* Email Extension FE + BE are in the same repo (monorepo).
* Tech stack
  * FE: iframe
  * BE:
    * python (fastAPI)
    * serverless (cloud run)
    * stateless (no db)
* Template for CI/CD and infra
* Scalable URL domain (?)
  * subdomain vs. domain
* 認證機制

EDM provider survey (SendGrid)

* sendgrid: <https://www.notion.so/cresclab/Send-emails-through-SendGrid-API-2558ce158938805d867fd081cb7eea64#2558ce158938805d867fd081cb7eea64>

***

System architecture diagrams

System chart

TBD. Use the component chart below as the current reference.

Component chart (editor + message builder)

extension FE: editor

extension BE: message builder

***

Authentication: token exchange (iframe editor)

Token exchange sequence diagram

* short-lived token: jwt (expires in 30s)
* long-live token: jwt for now (org level)
  * option 1: jwt (for now)

* option 2: open api
  * user_id is required in header for audit log (specific prefix for system)

***

Journey campaign editing flow

Campaign edit sequence diagram

Extension calls Rubato API for message storage.

* PATCH /extension/v1/campaign/{campaign_id} → build campaign layer message

```json
{
  "ref_type": "journey_node",
  "metadata": {
    "name": "gideon_test"
  },
  "raw_message": {
    "sender_profile_id": 1,
    "subject": "string",
    "member_name_default_value": "string",
    "message_editor_type": "drag-and-drop",
    "json": {},
    "html": "string"
  },
  "built_message": {
    "sender_profile_id": 1,
    "subject": "string",
    "member_name_default_value": "string",
    "message_editor_type": "drag-and-drop",
    "json": {},
    "html": "string"
  },
  "channel_id": 1
}
```

* GET /extension/v1/campaign/{id}/?ref_type=journey_node

```json
{ "ref_type": "journey_node" }
```

Response:

```json
{
  "ref_type": "journey_node",
  "ref_id": 100,
  "metadata": {
    "name": "string"
  },
  "raw_message": {
    "json": {},
    "html": "string"
  },
  "built_message": {
    "json": {},
    "html": "string"
  }
}
```

* DELETE /extension/v1/campaign/{pk}

```json
{ "ref_type": "journey_node" }
```

***

Message build and send flow (EDM / Email)

Campaign message send flow

Rubato calls extension API for message building.

* POST /api/email/v1/build_message payload

```json
{
  "receiver_entity_ids": [1],
  "built_message": {
    "sender_profile_id": 1,
```

```json
    "subject": "string",
    "member_name_default_value": "string",
    "message_editor_type": "drag-and-drop",
    "json": {},
    "html": "string"
  }
}
```

Response:

```json
{
  "data": [
    {
      "entity_id": 1,
      "recipient_id": "receiver_email",
      "personalized_message": {}
    }
  ]
}
```

Journey flow (email action execution)

Email Extension Repo

<https://github.com/chatbotgang/Epistola>

***

API design (EDM / Email in Journey)

This section focuses on **searchable endpoint keywords** and **integration points**. Keep endpoint names consistent in other docs to improve discoverability.

External service → MAAC BE (journey trigger)

* /api/v1/journey/trigger

```json
{
  "channel_type": "email",
  "channel_external_id": 123,
```

```
  "channel_entity_external_id": 456,
  "journey_id": 789
}
```

MAAC FE → MAAC BE (CRUD)

* GET Sender profiles Same response as the [definition](https://www.notion.so/202510-
EDM-in-journey-2878ce158938804f9ae5ceed1bcd4c47?pvs=21)
* POST /journey/v1/node/

```json
{
  "id": "string",
  "name": "string",
  "sender_profile_id": 1,
  "...": {}
}
```

Token minting (short-lived)

* POST /accounts/v1/token

```json
{ "expiration": 30 }
```

Response:

```json
{ "token": "abc" }
```

MAAC BE → Extension BE / Email service

Sender profile

* GET /extension/v1/email/sender_profile/ (query: sender_profile_id)

```json
[
  {
    "id": 1,
    "reply_to": "string",
    "from_email": "string",
    "from_name": "string",
```

```json
      "status": "valid",
      "channel_id": 1
  }
]
```

Campaign list (email)

* GET /campaign/v1/campaign/?channel_type=email

```json
[
  {
    "ref_type": "journey_node",
    "ref_id": 123,
    "metadata": {
      "name": "string",
      "journey_name": "string"
    },
    "raw_message": {
      "sender_profile_id": 1,
      "subject": "string",
      "member_name_default_value": "string",
      "message_editor_type": "drag-and-drop",
      "json": {},
      "html": "string"
    },
    "channel_id": 1
  }
]
```

Template API (email message templates)

* POST /email/v1/message/template/

```json
{
  "name": "123123",
  "subject": "string",
  "member_name_default_value": "string",
  "message_editor_type": "drag-and-drop",
  "json": {},
  "html": "string"
}
```

* PATCH /email/v1/message/template/{id}/

```json
{
  "name": "123123",
  "subject": "string",
  "member_name_default_value": "string",
  "json": {},
  "html": "string"
}
```

* DELETE /email/v1/message/template/{id}/
* POST /email/v1/message/template/search/ (params)
  * offset
  * limit
  * name_q

Response:

```json
{
  "count": 48,
  "results": [
    {
      "id": 9527,
      "name": "123123",
      "subject": "string",
      "member_name_default_value": "string",
      "message_editor_type": "drag-and-drop",
      "json": {},
      "html": "string"
    }
  ]
}
```

* GET /email/v1/message/template/{id}/

```json
{
  "id": 9527,
  "name": "123123",
  "subject": "string",
  "member_name_default_value": "string",
  "message_editor_type": "drag-and-drop",
  "json": {},
  "html": "string"
}
```

```
```

***

Iframe integration (MAAC FE → Extension FE)

Open the extension FE in an iframe

```
{extension_editor_url}?lang={maac_ui_language}&messageFor=journey&nodeId=9527
```

URL query parameters (keywords: iframe, editor URL, messageFor, nodeId)

* `lang` (optional, default: `en`)
  * Align Extension FE language with MAAC UI language.
* `messageFor` (required)
  * Which MAAC feature is using the extension.
  * Affects rendered input fields and called APIs.
  * Example: `journey`
* `nodeId` (conditionally required)
  * Target Journey node ID the message belongs to.
  * Required when `messageFor=journey`.
* `usedFor` (required)
  * Product identifier.
  * Values: `maac`, `caac`

Extension FE → MAAC FE (postMessage events)

Mutation notification. When PATCH or DELETE happens in Extension FE, notify MAAC FE to refetch node detail.

```json
{
  "type": "EMAIL_EDITOR_CONTENT_SAVED",
  "payload": { "node_id": 123 }
}
```

```json
{
  "type": "EMAIL_EDITOR_CONTENT_DELETED",
  "payload": { "node_id": 123 }
}
```

```json
```

```
{
  "type": "EMAIL_EDITOR_CLOSE_REQUESTED",
  "payload": { "node_id": 123 }
}
```

***

Extension API (iframe editor → Extension BE): raw message CRUD

PATCH /api/v1/node/{node_id} (drag-and-drop)

```json
{
  "name": "string",
  "metadata": { "name": "string" },
  "sender_profile_id": 1,
  "message_editor_type": "drag-and-drop",
  "raw_message": {
    "subject": "string",
    "member_name_default_value": "string",
    "json": {},
    "html": "string"
  }
}
```

PATCH /api/v1/node/{node_id} (HTML editor)

```json
{
  "name": "string",
  "sender_profile_id": 1,
  "message_editor_type": "html",
  "raw_message": {
    "subject": "string",
    "member_name_default_value": "string",
    "json": null,
    "html": "string"
  }
}
```

* GET /api/v1/node/{node_id}/

Response:
```

```json
{ "json": {}, "html": "string" }
```

* DELETE /api/v1/node/{node_id}

***

Additional APIs (reference)

This section keeps the remaining endpoints in a consistent format. Some endpoint naming is legacy and may change.

Campaign API (general)

Used for storing or retrieving email campaign content for a Journey node.

* PATCH `/api/campaign/v1`

```json
{
  "ref_type": "journey_node",
  "ref_id": 123,
  "metadata": { "name": "string" },
  "raw_message": {
    "sender_profile_id": 1,
    "subject": "string",
    "member_name_default_value": "string",
    "message_editor_type": "drag-and-drop",
    "json": {},
    "html": "string"
  }
}
```

* GET `/api/campaign/v1?ref_type=journey_node&ref_id=123`
* DELETE `/api/campaign/v1`

```json
{ "ref_type": "journey_node", "ref_id": 123 }
```

Email sender profiles

* GET `/api/email/v1/sender_profile`

```json
[
```

```
  {
    "id": 1,
    "reply_to": "no-reply@example.com",
    "from_email": "marketing@example.com",
    "from_name": "Example Company",
    "status": "verified",
    "channel_id": 1
  }
]
```

Channels

Same as MAAC `/channel/v1/channel`.

* GET `/api/channel/v1`

```json
[
  {
    "id": 1,
    "uuid": "string",
    "name": "string",
    "type": "email",
    "enable": true,
    "status": "valid",
    "channel_information": { "brand_domain": "string" }
  }
]
```

Google Analytics settings

* GET `/api/ga/v1/settings`

```json
[
  { "website_url": "https://example.com", "view_id": "123456" }
]
```

CDP tags

* GET `/api/cdp/v1/tags?source=maac`

```json
[
  { "id": 1563072, "name": "Tag name", "source": "maac" }
```

]
```

### Email templates (legacy)

* GET `/api/email/v1/template`
* POST/PATCH `/api/email/v1/template`

```json
{
  "name": "string",
  "raw_message": {
    "sender_profile_id": 1,
    "subject": "string",
    "member_name_default_value": "string",
    "message_editor_type": "drag-and-drop",
    "json": {},
    "html": "string"
  }
}
```

Send test email

* POST `/api/email/v1/send` (test email)

```json
{
  "to": ["user1@example.com", "user2@example.com"],
  "raw_message": {
    "sender_profile_id": 1,
    "subject": "Hello, this is a test email",
    "member_name_default_value": "Default member name",
    "message_editor_type": "drag-and-drop",
    "json": {},
    "html": "..."
  }
}
```

Member search (PII)

* POST `/api/member/v1/search`

```json
{ "email": "user@example.com" }
```

Token exchange (short-lived → long-lived)

* POST `/api/token/v1/exchange`

```json
{ "exchange_token": "short_lived_jwt" }
```

```json
{ "token": "long_lived_jwt" }
```

Extension service testing

* POST `/api/extension/{channel}/test_message`

```json
{
  "receiver_entity_ids": [1943, 393],
  "raw_message": {}
}
```

MDS callback handling (Journey email delivery results)

API details live here: <https://chatbotgang.slack.com/docs/T4TDRKSG4/F09KPV86S9F>

***

Admin Center: message template schema

message template (admin center)

	data type	
id	big int	
name	text	
channel_type	text	
message_type	text	
message	json	
organization_id	int (foreign key)	

202302 Customer Journey FE Scoping

Front-end scoping notes for Customer Journey V2 (canvas, editor, form, and report).
Includes Phase 1-1 task breakdown, risks, and deferred work.

{% hint style="warning" %}
⚠️ Out of date (kept for historical context).

* Owner: @Xander
* Status: draft, not ready for review
* Main references:
  * [202302 Journey Architecture & Design](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202302-journey-architecture-and-design)
  * [Customer Journey V2 overview (Asana)](https://app.asana.com/0/1203488823893405/overview)
    {% endhint %}

Purpose

Customer Journey is our workflow automation product for multi-step messaging. This doc scopes the **front-end work** for V2. It focuses on the **create/edit form**, **editor**, and **flow canvas**.

{% hint style="info" %}
Keywords: Customer Journey V2, frontend scoping, flow canvas, React Flow, node editor, trigger menu, conditions UI, journey report, performance
{% endhint %}

Goals and approach

{% stepper %}
{% step %}

Lay a solid foundation

Ship clean and maintainable foundations. Optimize for future iterations.
{% endstep %}

{% step %}

Ensure flow canvas performance

Keep the flow canvas smooth. Avoid performance cliffs.
{% endstep %}

{% step %}

UI standardization

Standardize shared components. Modernize UI patterns.
{% endstep %}

{% step %}

Ship MVP quickly

Ship an MVP fast. Defer non-critical work post-launch.
{% endstep %}
{% endstepper %}

Risks and unknowns

* Flow canvas scope is hard to estimate.
* State management is undecided (form + canvas).
* Some node settings and APIs are still not specified.
* End-to-end workflow mocking is expensive.
* Many small UI details require fast iteration.
* Design changes can invalidate estimates.
* QA process is new for this module.

***

Phase 1-1 (V2.0) — task breakdown

This is the Phase 1-1 checklist. Items are grouped by area.

List view

* [ ] List view needs tooltip text update
* [x] Need to review exactly when edit button is displayed

Create/edit form

* [ ] **Zustand reset state function**. State is not cleared on navigation. Old data can leak
into create/edit.
\[[Asana](https://app.asana.com/0/1203488823893405/1204520373993727/f)]
* [x] Publish (Step 2). Convert form data into mutation payload.
* [x] Redirect when edit is disallowed.

Node editor

* [ ] **Trigger menu / selection state**. Define how the menu opens.
⭐
\[[Asana](https://app.asana.com/0/1203488823893405/1204520376565844/
f)]
* [ ] **Tag Added node fields**
\[[Asana](https://app.asana.com/0/1203488823893405/1204520376565848/f)]
  * [ ] Fix Tag form item wiring (bug).

* [ ] **GA Page View node fields**
\[[Asana](https://app.asana.com/0/1203488823893405/1204520376565852/f)]
* [ ] **GA Purchase node fields**
\[[Asana](https://app.asana.com/0/1203488823893405/1204520376565854/f)]
* [ ] **Time delay node fields**
\[[Asana](https://app.asana.com/0/1203488823893405/1204520376565868/f)]
* [ ] **Yes/No branch node fields**. Impacts canvas. Needs more scoping. ⭐
* [ ] **LINE Message node fields**
\[[Asana](https://app.asana.com/0/1203488823893405/1204520376565875/f)]
* [ ] **LINE Message editor integration**
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888312/f)]
* [x] **Editor form validation handling**
* [ ] **Filters / conditions UI**
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888318/f)]
* [ ] Autosave UI. Needs icon + animation trigger.
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888267/f)]
* [x] Mock node mutation services (only if BE APIs are delayed).
* [x] Delete node confirmation modal (includes descendants).
\[[Asana](https://app.asana.com/0/1203488823893405/1204520376565880/f)]
* [ ] Create/update node mutation. Transform flat form data to nested API shape.
\[[Asana](https://app.asana.com/0/1203488823893405/1204520376565884/f)]
* [x] Sleep mode time validation (wontfix). UX edge cases exist.
* [ ] Source/target node arguments. Decide API shape. ⭐
* [ ] Editor ⟷ canvas coordination (cancel, deselect, etc.). ⭐

Flow canvas

* [x] **Layout algorithm lifecycle**
* [x] **Node context menu: all we have right now is a placeholder file**
* [ ] **Edge functionality: everything to do with this**
* [ ] **Yes/no branch implementation**
* [x] **Exit nodes: everything to do with this**
* [ ] **Freeze canvas while editing**. Disable non-active nodes. Limit interactions until delete/cancel/save.
\[[Asana](https://app.asana.com/0/1203488823893405/1204520376565888/f)]
* [ ] Node info display per spec. Current is rough.
\[[Asana](https://app.asana.com/0/1203488823893405/1204520376565892/f)]
  * [ ] Related bug: i18next::interpolator: missed to pass in variable time for interpolating Wait {{time}} minutes
* [ ] Currently users can select more than one node on the canvas but we might only want a single selection to be allowed

Report view

* [ ] API implementation
* [ ] Data card layout

* [ ] Some additional work needs to be done to abstract some common components from the Dashboard project to lay out the report page in the same way
* [ ] Canvas integration
* [ ] Date range picker

Templates

* [ ] Everything to do with templates; literally haven't spared a moment to even look into these requirements, so we should probably officially defer this functionality \[defer to 1-2?]

Welcome

* [ ] Everything to do with the welcome page \[defer to 1-2?]
* [ ] double check which

General

* [ ] Query key invalidation will need to be examined at some point; since we are still building out APIs and relying on mock data this is currently being handled in an ad hoc fashion
* [ ] Confirm API data structure with BE for node settings, branch_settings, and conditions; there are many details here that we have yet to fully spec out
* [x] Decision: do we need the get individual node and create individual node APIs anywhere?
* [ ] GA user event tracking; we already have a draft version of a hook for handling this, still need to integrate
* [ ] Translation keys are currently a huge mess because of reuse and disorganization; we need to clean this up a bit at some point, just for the dev experience to remain sane

***

Future phases — deferred from Phase 1-1

These tasks were deferred from phase 1-1.

General

* [ ] Additional UI enhancements; design team updated several of our common components while producing design mockups for this project but we deferred some of these due to time constraints. At some point it will be worth circling back to complete these enhancements:
  * [ ] List view: table enhancements
  * [ ] List view: filter tabs enhancements
  * [ ] List view: search bar enhancements
  * [ ] Form view: form steps enhancements
  * [ ] Form view: form fields enhancements
  * [ ] Form view: notice box enhancements

Canvas

* [ ] Canvas: dynamic node sizing (related to the layout algorithm)
* [ ] Node toolbar delete button, showing a trash can icon; since this duplicates functionality already provided in the node editor we are pushing off to phase 1-2
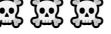
Editor

* [ ] Node editor menu and drag-and-drop functionality; since the context menu is sufficient for operating the module we deferred the implementation of drag-and-drop
  * [ ] Proximity sensor; we want to be able to show users where items can be dropped or interacted with, and luckily this seems to be built into Reactflow
  * [ ] Placeholder for nodes to be dropped into
* [ ] DPM message editor integration

Types/Schemas

* [ ] Zodios integration; we're currently using Zod schemas on this project, but not Zodios itself, as we're short on time. It would be good to circle back to this in future phases after we hammer out some conventions for using Zodios in the Grazioso codebase.
* [ ] Improved Zod date parsing; currently we're using coerced dates but the implementation feels a little tricky and prone to problems.
* [ ] Improved Zod schemas with discriminated unions; currently we're held up by the Zod API being in flux, but it would be helpful to better organize schemas with better unions.

***

<details>

<summary>Task Breakdown 1.0 (Obsolete) ☠☠☠ — (click to expand)</summary>

Everything below here is only for reference…

Fundamentals

These are the tasks that are easily surfaced from the PRD and design mockups in their present state. This work can proceed without much delay, but finalizing some aspects may have to wait on decisions made by stakeholders.

* [x] Scaffolding: folder structure, file naming conventions, boilerplate for types, services, queries, data-fetching hooks, pages, etc.
([Asana](https://app.asana.com/0/1203488823893405/1203975222068835/f))
* [x] Initial feature flag
([Asana](https://app.asana.com/0/1203488823893405/1203975222068835/f))
* [x] Integrate custom SVG icons \[in progress]
* [ ] Zod and Zodios integration for API specifications and services; currently we're using an assortment of Zod schemas for type safety but we'll want to make this more robust by adopting the Zodios solution ViPro implemented in Zeffiroso (or something like it anyway);

luckily I think we can address this a little later on
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888273/f) / 3 d?]
  * [ ] Parse dates with Zod; currently we're using coerced dates but the implementation feels a little tricky and prone to problems \[0.5 d]
  * [ ] New Switch API will be very helpful for node data; upgrade from Zod's discriminated unions when this feature is released \[1 d]

List View \[7-10 days?]

* [ ] List page UI adjustments: we're updating a bunch of shared components in this project according to specs prepared by PDs; these tasks are lower priority and can be put off to the end of Phase 1-1
\[[Asana](https://app.asana.com/0/1203488823893405/1203998432692644/f)]
  * [ ] Filter Tabs; design mockups show several visual changes
\[[Asana](https://app.asana.com/0/0/1203998432692649/f) / 1 d]
  * [ ] Table; this one has more parts and requires more effort and coordination with PDs
\[[Asana](https://app.asana.com/0/0/1203998432692651/f) / 2+ d]
  * [ ] Searchbar; minor visual changes, can put this off until later
\[[Asana](https://app.asana.com/0/0/1203998432692647/f) / 0.5 d]
  * [x] Table cell toggle components; might not be too troublesome to implement \[1? d]
  * [x] Table cell pill components; these seem to be a minor adjustment of existing UI components \[0.5? d]
* [x] List page implementation: layout, business logic, services, hooks, mock data, types, etc., many of which are already scaffolded and require refinement
\[[Asana](https://app.asana.com/0/1203488823893405/1203998432692671/f) / 3 d]
  * [x] Mock data / types
  * [x] Pagination; if I'm not mistaken we can launch with infinite scroll but should implement pagination at some point? Update: infinite scrolling was implemented

Create/Edit Form View

* [ ] Form page UI adjustments: some shared components here will also be updated in this project ([Asana](https://app.asana.com/0/1203488823893405/1203998432692660/f))
  * [ ] Form steps; design mockups have a number of visual changes to this component
\[[Asana](https://app.asana.com/0/0/1203998432692664/f) / 1 d]
  * [x] Form field toggles \[in progress]
  * [ ] Form fields; only some minor adjustments needed here
\[[Asana](https://app.asana.com/0/0/1203998432692667/f) / 0.5 d]
  * [ ] Notice box; another component qualifying for an upgrade to the shared path after minor cleanup \[[Asana](https://app.asana.com/0/1203488823893405/1204263652427870/f) / 0.5 d]
* [x] Form page implementation: this is best split into several parts, the easy steps and the flow canvas \[?]
  * [x] Basic settings scaffolding \[in progress]
  * [x] Message sending options, rough draft \[in progress]
* [ ] Form autosave functionality
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888267/f) / ? d]

* [ ] Form state management
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888270/f) / still to research]

Workflow Canvas

Note: workflow canvas is primarily a component of the create/edit form, but it will also be reused to display workflows in the report view, with some modifications.

* [x] Evaluate libraries ([Asana](https://app.asana.com/0/1203488823893405/1203998433260050/f))
* [x] Layout algorithm
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888276/f)]
  * [x] Evaluation of libraries (d3-hierarchy, d3-dag); the former seems to work, but I'm still curious about whether the latter produces better results; both are a bit awkward to work with and not entirely type-safe but there doesn't seem to be anything better/more modern to work with \[2 d?]
  * [x] Implementation; initial evaluation suggests some technical challenges related to node placement, because our nodes will vary in size, and most algorithms assume a fixed size; most people seem to overcome this issue by handling layout in two passes, rendering once to obtain node size, and then rendering again after measurements have taken place \[3 d?]
* [ ] Drag and drop functionality; not an intrinsic feature of Reactflow, will require more investigation and experimentation
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888264/f) / 5? d]
  * [ ] Proximity sensor; we want to be able to show users where items can be dropped or interacted with, and luckily this seems to be built into Reactflow \[1? d]
  * [ ] Placeholder for nodes to be dropped into
* [ ] Workflow panel; already in progress
  * [ ] Scaffolding; put these components in place without completing all details
\[[Asana](https://app.asana.com/0/1203488823893405/1204222675445043/f) / in progress]
  * [ ] Select Trigger
  * [ ] Edit Trigger
  * [ ] Add node
  * [ ] Filters/conditions
    * [ ] Basic scaffolding, just to get it working
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888300/f) / 2 d?]
    * [ ] Details, of which there are many
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888318/f) / 3 d?]
* [x] Scrolling/zooming functionality; this appears to be built-in to Reactflow but will need to study design mockups and evaluate whether everything is being met
  * [x] Basic implementation
  * [x] UI enhancements (zoom to center, zoom on update, etc.)
* [ ] Nodes \[[Asana](https://app.asana.com/0/1203488823893405/1204263652888297/f) / 3 d?]
  * [ ] Triggers
  * [ ] Rules
    * [ ] Yes/no branch
  * [ ] Actions

* [ ] LINE Message editor integration
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888312/f)]
   * [ ] DPM Message editor integration
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888314/f)]
  * [ ] Exit nodes; still need to evaluate how these should be implemented
* [ ] Edges \[some unknowns here]
  * [ ] Context menu; shouldn't be too hard once everything else is in place, this is a simple/compact version of the Add Node menu on the Panel
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888308/f) / 2 d?]
* [ ] Unsaved changes handling
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888303/f)]

Report View

This also uses the flow canvas to display content, so it makes sense to design the canvas with this dual functionality in mind

* [ ] Report page implementation; hooks, services, types, etc.
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888284/f) / 2 d]
* [ ] Report page workflow canvas integration
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888286/f) / ? d]
* [ ] Date range picker integration
* [x] Shared DataCard component
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888279/f) / in progress]

Cleanup

Various tasks to keep in mind for later on.

* [ ] UI translation key cleanup
\[[Asana](https://app.asana.com/0/1203488823893405/1204263652888290/f) / 2 d]
* [ ] GA user event tracking; we're fortunate in that the existing Journey module has a wide assortment of tracking hooks, but some work needs to be done to see if we're going to just copy these over 1:1, or if some require modification, and if we'd like to add any more ([Asana](https://app.asana.com/0/1203998432692652/f))

Speculative & Not Yet Scoped

Additional research and time estimates still required for these items

* [ ] List page announcement banner; this looks new, and we'll have to discuss where the announcement data are coming from (built-in to the UI, pulled from the back-end, etc.) ([Asana](https://app.asana.com/0/1203998432692650/f))
* [ ] Template system; haven't really looked into this too deeply yet; are templates supposed to be configurable? Or all predefined?
* [ ] Welcome page

Flow Canvas Library Review \[Outdated]

Currently Customer Journey uses a custom solution for drawing a canvas and placing nodes. This approach won't scale as we invest more heavily in Journey functionality. For this reason, it makes sense to review available libraries ([Asana](https://app.asana.com/0/1203998433260050/f)).

* [React Flow](https://reactflow.dev/): this is the one to beat, by the looks of it. Modern, updated, customizable. The [showcase](https://reactflow.dev/showcase/) has some good examples. It is already being used for Customer Journey implementations. Chosen 🏆
* [GGEditor](https://github.com/alibaba/GGEditor): made by Alibaba; the implementation seems very basic and the aesthetic isn't very good. Last updated 2020 🙍
* [React Diagrams](https://github.com/projectstorm/react-diagrams): ugly aesthetic
* [React Flow Diagram](https://github.com/DrummerHead/react-flow-diagram): ugly, old, outdated 🙍

Layout Algorithm Library Review \[Outdated]

* d3-hierarchy is standard but only works on tree data
* d3-dag has potential but is complicated to use, still investigating this one
* d3-force seems like overkill but is sometimes used for network graphs
* Ant Design has a graphing library that is really outdated
* Cytoscape has some useful utilities but it seems hard to extract the relevant algorithm
* Dagre is a popular library (and used in reactflow examples) but it is long deprecated
* I suspect many companies developing workflows with controlled layouts rip code out of an old library and update it for their needs, but this will be a significant chunk of work

</details>

***

Future Phases \[Notes]

* Flow canvas: do we need the ability to create/edit segments within this view? (Tags will not be too difficult) \[not in this phase]
* Flow canvas: is there any limit to the number of (horizontal) branches we need to support? \[5-10]

Flow Canvas Design

Presently we roll a custom solution for the Customer Journey workflow canvas (flow canvas for short). For V2 we decided to use a library to handle the more complicated and customizable UI we plan to implement. This library, React Flow, provides many of the visual primitives necessary to build a flow canvas with a performant mix of SVG and regular HTML elements.

By default React Flow is configured to allow nodes and edges to be fully interactive; users can drag and drop nodes anywhere, connect nodes, etc. Customer Journey requires a more strictly regimented layout: nodes must appear at specific locations, and not every node can

be connected to each other. Rather, our use of a node tree is mostly for visual layout purposes, and we don't plan to use more powerful means of manipulating nodes and edges. For this we need a layout engine of some kind, of which d3-hierarchy emerged as the most suitable (as other candidates were either far too large, abandoned, or otherwise poorly supported).

Still to do

* [ ] Center canvas after data fetching/rendering
* [ ] Center canvas on newly created node
* [ ] 2-step node layout: first we need to compute default arrangement, then re-compute based on rendered node sizes

***

Maintenance notes

This page is long. If we keep using it, split it into:

* Scope and goals
* Phase 1-1 checklist
* Deferred work
* Obsolete reference

202410 CDH tag journey rule

Design notes for supporting CDH tag conditions in Customer Journey rules. Covers condition schema changes, tag source (MAAC/CAAC), and related API payload updates.

Authors: @XXXX, @YYYY

Overview

This doc tracks the **Customer Journey rule** change needed to support **CDH tags**.

The core change is adding a **tag source** (e.g. `maac` / `caac`) into **condition objects** and **node settings**, so rule evaluation and UI can stay consistent across tag origins.

{% hint style="info" %}
Keywords: CDH tag, Customer Journey rule, tag source, MAAC, CAAC, condition object, filters.conditions, trigger, Tag Added, API payload
{% endhint %}

Quick links

* Journey context:

* [Customer Journey feature overview](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/broken-reference)
  * [202302 Journey Architecture & Design](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202302-journey-architecture-and-design)
  * [20250619 Journey node performance](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/20250619-journey-node-performance)
* Tagging + channel scope:
  * [202302 Customer Journey FE Scoping](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202302-customer-journey-fe-scoping) (Tag trigger/editor fields)
  * [202510 EDM in Journey onboarding contact management_](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202510-edm-in-journey-onboaring-contact-management_)
* Email journey integration (often touches tags + contact identity):
  * [202510 EDM (Email) in Customer Journey — Architecture, Token Exchange, and API Design](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202510-edm-email-in-customer-journey-architecture-token-exchange-and-api-design)

References

* PRD:
  * [PRD Omnichnnel Customer Journey (LINE_SMS_EDM)](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/product-specifications/prd-omnichannel-customer-journey-line-sms-edm)
  * [Customer Journey PRD_Phase 1 1](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/product-specifications/customer-journey-prd_phase-1-1)
  * [Source Links](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/broken-reference)
* ERD: TBD

Doc file name: `yyyymm(created_time)` (e.g. `202010`)

Overview / Background

Current state:

* Journey rules can reference tags.
* CDH may contain tags from different sources.
* The rule engine and UI need a stable way to disambiguate the tag source.

Problem

Without a source field:

* UI cannot reliably filter / render tags from MAAC vs CAAC.
* Backend condition evaluation can become ambiguous.
* Debugging triggers becomes harder (same tag ID/name across systems).

Goal / Requirement

* Add a `source` (or equivalent) field into condition objects.
* Keep backward compatibility for existing journeys.
* Make the new shape discoverable in API payload examples.

Proposed Solution(s)

How would you do this, what resources you'd need. Technical details.

Solution 1

Solution 2 (if any)

Decision, and why

* API Condition object data structure adjustment

new field	type	note
source	string	either 'maac' or 'caac'

* object example

{% code title="Condition object example (JSON)" %}

```json
{
  "condition": "tag",
  "op": "with",
  "value": 14887,
  "extra": {"source": "maac"}
}
```

{% endcode %}

* PATCH endpoint

{% code title="PATCH /journey/v1/node/{node_id}/ (payload example)" %}

```json
{
  "type": "tag_added",
  "settings": {
    "tag_id": 4388,
    "tag_source": "maac"
  },
  "filters": {
    "match": "all",
    "conditions": [
      {
        "condition": "tag",
        "op": "with",
        "value": 14887,
        "extra": {
          // new field
          "source": "maac"
        }
      }
    ]
  }
}
```

{% endcode %}

* PATCH response example

<details>

<summary>Response (click to expand)</summary>

{% code title="PATCH response example (JSON)" %}

```json
{
  "id": 27397,
  "journey_id": 6439,
  "name": null,
  "type": "tag_added",
  "category": "trigger",
  "settings": {
    "tag_id": 4388,
    "tag_source": "maac"
  },
  "filters": {
    "match": "all",
```

```
      "conditions": [
        {
          "condition": "tag",
          "op": "with",
          "value": 14887,
          "extra": {
            "source": "maac"
          }
        }
      ]
    },
    "branch_settings": {},
    "created_at": "2024-10-17T09:36:51.704553+08:00",
    "updated_at": "2024-10-17T10:55:08.716110+08:00"
}
```

{% endcode %}

</details>

* GET endpoint

{% code title="GET /journey/v1/journey/{journey_id}" %}

```http
GET /journey/v1/journey/{journey_id}
```

{% endcode %}

* GET response example

<details>

<summary>Response (click to expand)</summary>

{% code title="GET response example (JSON)" %}

```json
{
  "id": 6439,
  "bot_id": 83,
  "name": "test 1017",
  "schedule_start_at": null,
  "schedule_end_at": null,
  "repeat_journey_times": null,
  "line_message_quota": null,
```

"sleep_start_time": null,
"sleep_end_time": null,
"status": "draft",
"created_at": "2024-10-17T09:36:51.693771+08:00",
"updated_at": "2024-10-17T10:00:00.509858+08:00",
"nodes": [
 {
  "id": 27397,
  "journey_id": 6439,
  "name": null,
  "type": "tag_added",
  "category": "trigger",
  "settings": {
   "tag_id": 4388,
   "tag_source": "maac"
  },
  "filters": {
   "match": "all",
   "conditions": [
    {
     "condition": "tag",
     "op": "with",
     "value": 14887,
     "extra": {
      "source": "maac"
     }
    }
   ]
  },
  "branch_settings": {},
  "created_at": "2024-10-17T09:36:51.704553+08:00",
  "updated_at": "2024-10-17T10:55:08.716110+08:00"
 },
 {
  "id": 27398,
  "journey_id": 6439,
  "name": null,
  "type": "exit",
  "category": "rule",
  "settings": {},
  "filters": {},
  "branch_settings": {},
  "created_at": "2024-10-17T09:36:51.710827+08:00",
  "updated_at": "2024-10-17T09:36:51.710855+08:00"
 },
 {
  "id": 27399,
  "journey_id": 6439,

```
      "name": "test 1017",
      "type": "send_line_message",
      "category": "action",
      "settings": {
        "name": "test 1017",
        "messages": [
          {
            "data": {
              "text": "測試成功！"
            },
            "module_id": 1,
            "parameters": [],
            "quick_reply": {
              "items": []
            }
          }
        ]
      },
      "filters": {},
      "branch_settings": {},
      "created_at": "2024-10-17T09:59:18.768913+08:00",
      "updated_at": "2024-10-17T09:59:46.870018+08:00"
    }
  ],
  "paths": [
    {
      "id": 34139,
      "source_node_id": 27397,
      "target_node_id": 27399,
      "index": 0
    },
    {
      "id": 34140,
      "source_node_id": 27399,
      "target_node_id": 27398,
      "index": 0
    }
  ]
}
```

{% endcode %}

</details>

Tasks

Items no larger than 1 day. If there's any, break it down smaller.

* Component 1
* Feature A (2 hr)
* Feature B (2 hr)
* Component 2
* DB change (4 hr)
* External API (1 day)
* Help from sales

Total time required + buffer: 2.5 days

Measurement

* How do you define/measure success?
* How do you monitor/test the health of this projects?

Feedback

Section for others to leave feedback and questions. Example:

@George

This is great, but we may need to change the DB schema...

202302 Journey   Architecture & Design

System architecture design for MAAC Customer Journey. Covers trigger flow, journey execution flow, status models, and core database schema.

{% hint style="warning" %}
🚧 This page is being reorganized.

* Author: @Jhenyi Jhan
* Last updated: 2023-05-10
* Status: In progress
  {% endhint %}

This doc is the **system architecture design** for **MAAC Customer Journey**.

It covers the **trigger pipeline**, **journey execution flow**, **status models**, and the core **database schema**.

{% hint style="info" %}
Keywords: Customer Journey architecture, trigger flow, journey flow, Rubato, RabbitMQ, Cloud Pub/Sub, LBEC, member progress, journey status, PostgreSQL schema
{% endhint %}

Related documents

1. [Customer Journey PRD_Phase 1](https://docs.google.com/document/d/1xzO9-7TlaObaxMfVldyIInyuATR9jjM48GSQY5KzloM/edit?usp=sharing)
2. [Customer Journey PRD_Phase 1-1](https://docs.google.com/document/d/1J8L3YUm6v-N41B0m-YFD-sAyEM75HMwB00NZ2U6sQHY/edit?usp=sharing)
3. [Customer Journey PRD_Phase 1-2](https://docs.google.com/document/d/1Iw_yHy6tRxUTRcJ8B8YpdsPlz_gzDLH721STlMoJfos/edit?usp=sharing)
4. [Customer Journey PRD_Phase 1-3](https://docs.google.com/document/d/14fppjxNA_zaRS019usYJSrhktrWdFP7M3Pk6lxgaQzo/edit?usp=sharing)
5. [Customer Journey PRD_Phase 1-4](https://docs.google.com/document/d/1Xxhdv1tFvAF7jfDJJO5ADx_XPhpjloJnWDcgSbZorLI/edit?usp=sharing)
6. [Customer Journey Dictionary / Working table](https://docs.google.com/spreadsheets/d/1KdXDWnIt6c_ad9PshokFmY6tlY6bxCWzb9mk6xhr72Q/edit?usp=sharing)

Overview

This document is the system architecture design for the customer journey. There are two parts, the first part is the core design of the customer journey and the second part is how to integrate other systems or services.

Goals

1. Design clear and simple system architecture and flow.
2. Design a flexible module to support future requirements and integration.

Definitions

The definitions can be found in this document ([Dictionary](https://docs.google.com/spreadsheets/d/1KdXDWnIt6c_ad9PshokFmY6tlY6bxCWzb9mk6xhr72Q/edit?usp=sharing)).

Architecture Sharing Video

<figure><img src="broken-reference" alt=""><figcaption></figcaption></figure>

System Architecture

Figure 1: Architecture Overview ([**Source**](https://drive.google.com/file/d/1fbQedk0LcbTKAoHhn7MOWBC3GtxnhFwj/view?usp=share_link)**)**

Figure 1: Architecture Overview ([Source](https://drive.google.com/file/d/1fbQedk0LcbTKAoHhn7MOWBC3GtxnhFwj/view?usp=share_link))

In the design, we will focus on two topics:

1. How does the customer start the journey? → **Trigger Flow**

2. How does the customer progress through the journey? → **Journey Flow**

Trigger Flow

Figure 2: Trigger Flow ([Source](https://drive.google.com/file/d/1vrZMd5sv4tNhuTn5w_I3r2Gs6H3q20LB/view?usp=share_link))

The trigger flow will focus on how to make the customer start the journey, and two types of triggers can be defined here:

1. Event-Based Trigger
2. Time-Based Trigger

Event-Based Trigger

This trigger collects domain events from other services, which do not need to understand the design of the customer journey and are decoupled from each other.

The design of events will follow the [Log-Based Event Collection (LBEC)](https://www.notion.so/Log-Based-Event-Collection-LBEC-fd9f763f79fb443d83486c0ee34fbf13?pvs=21) and [202211 Specification - Application Logs](https://www.notion.so/202211-Specification-Application-Logs-f08316ee4bf64881be24dbc1ce20ff61?pvs=21).

The steps are described as follows:

1. Cloud Logging Sink will push the event logs supported by the customer journey to Cloud Pub/Sub
2. According to the [202211 Specification - Application Logs](https://www.notion.so/202211-Specification-Application-Logs-f08316ee4bf64881be24dbc1ce20ff61?pvs=21) , we will add a support_journey key to the metadata of the logs supporting customer journeys, and then the log filter will be able to get all the logs supporting journeys with this key
3. Cloud Pub/Sub will push to the Rubato HTTP Server
4. The Rubato HTTP server extracts the data from the data field in the log, and sends an event with the event data attached to RabbitMQ
5. The Rubato Worker receives a task from RabbitMQ and performs the following checks based on the event data:

6. Is the event supported by the customer journey?
7. Is there an active journey setting for this bot?
8. Finally, the customer will start the journey

Time-Based Trigger

This trigger will notify the system to retrieve the data and add the customer to the journey, based on some scheduling tool or data pipeline (e.g. Airflow).

Journey Flow

Definition: Journey Status

Figure 3: Journey State diagram
([Source](https://drive.google.com/file/d/1YRDddDOe7fu35Yj1rwBYbrWbqZpj7rcP/view?usp=share_link))

* DRAFT: This journey is being developed and has not been published yet.
* ONGOING: This journey has already been published. Depending on the journey schedule, the journey may be ongoing or scheduled to start at a later time. To edit this journey, it needs to be paused first.
* PAUSED: The journey has been published and the journey has been paused. Customers will not start the journey and those already on the journey will not move until the journey is turned on again.
* ENDED: This journey has already been published. The journey has ended because of the scheduled end time of the journey.
* Flowchart (Mermaid)

```mermaid
flowchart TD
  new(( )) -- Create --> drafted[DRAFT]
  drafted -- Publish --> ongoing[ONGOING]
  ongoing -- Pause --> paused[PAUSED]
  paused -- Turn On --> ongoing
  paused -. Scheduled End Time Reached .-> ended[ENDED]
  ongoing -. Scheduled End Time Reached .-> ended
```

Definition: Member Progress Status

Figure 4: Customer Progress State diagram
([Source](https://drive.google.com/file/d/1QCzLfPoyCgArQb0xxNVrbBgqA8A5aLMK/view?usp=share_link))

* READY: The member progress is ready to run. If there is a scheduled time, it will run at that time.
* RUNNING: The member progress is currently running.
* WAITING: The member progress is waiting and will continue at the scheduled time.
* CANCELED: The member progress is canceled after running 有被 trigger 但走到一半沒走

到終點（被迫取消）

* ENDED: The member progress has ended. 有走到終點

* ERROR: The member progress encountered an error while running.

Use Case: Scheduled Journeys Progress

Crontab Schedule: Every minute

```mermaid
sequenceDiagram
  Scheduler ->> RabbitMQ: Publish message
  Note right of Scheduler: Message: Scheduled Journeys Progress

  RabbitMQ ->>+ Worker: Pull message
  Note left of Worker: Message: Scheduled Journeys Progress

  Worker ->>+ PostgreSQL: Get all progress with the status of READY and no scheduled time
  PostgreSQL ->>- Worker: data

  loop every progress
    Worker ->> RabbitMQ: Publish message
    Note left of Worker: Message: Run journey
  end

  Worker ->>+ PostgreSQL: Get all progress with status READY and schedule time reached
  PostgreSQL ->>- Worker: data

  loop every progress
    Worker ->> RabbitMQ: Publish message
    Note left of Worker: Message: Run journey
  end
```

Worker ->>+ PostgreSQL: Get all progress with status RUNNING and an updated time
before a specfic time
  PostgreSQL ->>- Worker: data

  loop every progress
    Worker ->> RabbitMQ: Publish message
    Note left of Worker: Message: Run journey
  end

  Worker ->>+ PostgreSQL: Get all progress with status WAITING and schedule time
reached
  PostgreSQL ->>- Worker: data

  loop every progress
    Worker ->> RabbitMQ: Publish message
    Note left of Worker: Message: Run journey
  end
```

{% hint style="info" %}
This use case periodically scans all progress (except `ENDED`) to drive execution.
{% endhint %}

* READY: This progress is ready to run.
* RUNNING: This progress is running, if the update time is before five minutes, it will be
made to run again.
* WAITING: This progress is waiting, if it has reached its scheduled time, it will be made to
run again.

Use Case: Run Journey

![](https://content.gitbook.com/content/GBP3mPdNeU7kBvG5sba7/blobs/2Y4G5L1RJIyj9vq
PNCEI/Unknown%20image)

```mermaid
sequenceDiagram
  RabbitMQ ->> Worker: Pull message
  Note left of Worker: Message: Run Journey

  Worker ->>+ PostgreSQL: Get progress
  PostgreSQL ->>- Worker: data

  opt progress is READY
    Worker ->> PostgreSQL: Update progress to RUNNING
    PostgreSQL ->> Worker: OK
  end

  break progress is WAITING

```
    Worker ->> PostgreSQL: Update progress to RUNNING & update current node = next
node
    PostgreSQL ->> Worker: OK
    Worker ->> RabbitMQ: Publish message
    Note left of Worker: Message: Run Journey
  end

  break In the trigger node
    Worker ->> PostgreSQL: Update current node = next node
    PostgreSQL ->> Worker: OK
    Worker ->> RabbitMQ: Publish message
    Note left of Worker: Message: Run Journey
  end

  break In the exit node
    Worker ->> PostgreSQL: Update current node = null & set the status as ENDED.
    PostgreSQL ->> Worker: OK
  end

  Worker ->> Worker: Execute current node logic
  Worker ->> PostgreSQL: Update current node = next node
  PostgreSQL ->> Worker: OK
  Worker ->> RabbitMQ: Publish message
```

Detail Design

[**API Reference**](https://www.notion.so/API-Reference-76a4998148a1472bb3d27415e0e08bf8?pvs=21)

Database Schema

journey_journey

Name	**Type**	**Description**
id	bigserial	Primary Key
bot_id	bigint	Foreign Key (line_bot)
name	varchar(32)	
schedule_start_at	timestamptz	Nullable
schedule_end_at	timestamptz	Nullable
repeat_journey_times	integer	Nullable
line_message_quota	bigint	Nullable
sleep_start_time	time	Nullable
sleep_end_time	time	Nullable
status	varchar(16)	Enum

* draft

* ongoing
* paused
* ended | | created_at | timestamptz | | | updated_at | timestamptz | |

journey_node

Name	**Type**	**Description**
id	bigserial	Primary Key
journey_id	bigint	Foreign Key (journey_setting)
name	varchar(32)	Nullable
key	varchar(32)	Enum
category	varchar(16)	Enum

* trigger
* rule
* action | | settings | json | | | filters | json | | | branch_settings | json | (WIP) | | created_at | timestamptz | | | updated_at | timestamptz | |

journey_node_path

Name	**Type**	**Description**
id	bigserial	Primary Key
source_node_id	bigint	Foreign Key (journey_node)
target_node_id	bigint	Foreign Key (journey_node)
index	smallint	

journey_member_progress

Name	**Type**	**Description**
id	bigserial	Primary Key
journey_id	bigint	Foreign Key (journey_setting)
node_id	bigint	Foreign Key (journey_node)
Nullable		
member_id	smallint	Foreign Key (line_member)
schedule_at	timestamptz	Nullable
status	varchar(16)	Enum

* ready
* running
* waiting
* ended | | created_at | timestamptz | | | updated_at | timestamptz | |

journey_report

| **Name** | **Type** | **Description** |

| -------------------- | --------- | ----------------------------- |
id	bigserial	Primary Key
journey_id	bigint	Foreign Key (journey_setting)
trigger	bigint	
in_progress	bigint	
exit	bigint	
transaction_revenue		

journey_execution_report

journey_performance_report

journey_node_execution_report

journey_node_performance_report

Measurement

📝 TODO

1. Plan the design for performance monitoring.

Product Success Metrics

* **of clients(bot) publish at least 1 journey**
  * Data Sources
    * [journey_journey](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21)
  * Conditions
    * status ≠ "draft"
    * GROUP BY bot_id
* **of sidebar click (Awareness)**
  * Data Sources
    * GA
* **of template publish**
  * (WIP)
* **of active (Enable)**
  * Data Sources
    * [journey_journey](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21)
  * Conditions
    * status = 'active'

Product Performance Outcome

* **of users being triggered**
  * Data Sources

*
[journey_member_progress](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21)
* **of users completed the journey**
  * (WIP)

Performance Monitoring

Changelog

2023-05-10

* Turn REST API into [page](https://www.notion.so/API-Reference-76a4998148a1472bb3d27415e0e08bf8?pvs=21)

2023-04-13

* Add new API [Publish a journey](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21)
* Update API response status code scenario

2023-04-09

* Update [journey status diagram](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21)

2023-03-37

* Add new API [Retrieve journey count](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21)

2023-03-22

* Modify the [journey](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21) object in the API to include resources for nodes and node paths
* Add the object [node path](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21) as an API resource

2023-03-21

* Rename the journey_path schema to journey_node_path

2023-03-20

* Rename the [journey_member_progress](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21) schema property from schedule_time to schedule_at

2023-03-19

* Rename the journey status options from active to ongoing to align them with the product design
* Add the journey status ended
* Remove the property frequency_seconds from the journey
* Add 2 APIs " [Turn on a journey](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21)" and " [Turn off a journey](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21)"
* Add the properties schedule_start_at and schedule_end_at for the journey

2023-03-16

* Rename the node path properties from to source and to to target

2023-03-08

* Add the first version of [REST API](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21)
* Add the first version of the [product success metric](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21)

2023-03-06

* Update detailed description for log filtering

2023-03-05

* Update the [architecture overview diagram](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21) to more clearly show the relationships between the system and internal/external services
* Remove the SLEEPING status and refine the [definition](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21) description
* Add definition of [journey status](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21)

2023-02-28

* Add changelog

2023-02-23

* Add missing RUNNING status logic in the " [Scheduled Journeys Progress](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21)" use case
* Add more description to the use case " [Scheduled Journeys Progress](https://www.notion.so/e07e4a98fba140f3876c3b722469ccf3?pvs=21)"

2023-02-22

* Initial version

WIP

[API Specification Changes - Create a journey node](https://www.notion.so/API-Specification-Changes-Create-a-journey-node-6ada9280a59442feabca3d65832b49f2?pvs=21)

[Event Reference](https://www.notion.so/Event-Reference-af95e8f63f394184a22d400de44ae313?pvs=21)

[FAQ](https://www.notion.so/FAQ-83f7644506174ac49e7ca6023cd1af70?pvs=21)

[Architecture](https://www.notion.so/Architecture-b85a2b91e4f4431cb6dac248556fbf5b?pvs=21)

202510 EDM in Journey onboaring contact management_

Email (EDM) onboarding contact management APIs for Customer Journey. Covers sender domains, sender profiles, and DNS validation flow.

Overview

This doc captures the **Email/EDM onboarding APIs** used by Customer Journey to manage **sender domains** and **sender profiles**.

It focuses on the **contact management** slice of onboarding, including **DNS validation** (SendGrid domain authentication) and the expected response shapes.

{% hint style="info" %}
Keywords: EDM onboarding, email channel, sender domain, sender profile, domain validation, DNS, DKIM, DMARC, SendGrid, Customer Journey API
{% endhint %}

Related:

* [202510 EDM (Email) in Customer Journey — Architecture, Token Exchange, and API Design](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202510-edm-email-in-customer-journey-architecture-token-exchange-and-api-design)
* [202510 EDM in Journey onboaring (admin center)](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202510-edm-in-journey-onboaring-admin-center)

Endpoint index

* `GET /api/v1/channels/{channel_id}/sender-domains`
* `GET /api/v1/channels/{channel_id}/sender-profiles`
* `POST /api/v1/channels/{channel_id}/sender-domains/{domain_id}/validate`

GET /api/v1/channels/{channel_id}/sender-domains

Success Response (200 OK)

{% code title="Response (application/json)" %}

```json
{
  "sender_domains": [
    {
      "id": 1,
      "domain": "example1.com",
      "status": "verified",
      "mail_cname_status": "pass",
      "dkim1_status": "pass",
      "dkim2_status": "pass",
      "dmarc_status": "pass",
      "created_at": "2024-01-01T00:00:00Z",
      "updated_at": "2024-01-01T00:00:00Z"
    },
    {
      "id": 2,
      "domain": "example2.com",
      "status": "warning",
      "mail_cname_status": "pass",
      "dkim1_status": "fail",
      "dkim2_status": "pass",
      "dmarc_status": "pass",
      "created_at": "2024-01-01T00:00:00Z",
      "updated_at": "2024-01-01T00:00:00Z"
    },
    {
      "id": 3,
      "domain": "example3.com",
      "status": "not_set",
      "mail_cname_status": "fail",
      "dkim1_status": "fail",
      "dkim2_status": "fail",
      "dmarc_status": "pass",
      "created_at": "2024-01-01T00:00:00Z",
      "updated_at": "2024-01-01T00:00:00Z"
    }
  ]
```

}
```

{% endcode %}

Error Responses

Status Code	Error Code	Description
400	BAD_REQUEST	Invalid request
401	UNAUTHORIZED	Missing or invalid JWT token
404	CHANNEL_NOT_FOUND	Channel does not exist or doesn't belong to the organization

***

GET /api/v1/channels/{channel_id}/sender-profiles

Description Get all sender profiles for a specific email channel

Path Parameters

* channel_id (integer, required): The ID of the email channel

Response

Success (200 OK)

{% code title="Response (application/json)" %}

```json
{
  "sender_profiles": [
    {
      "id": 1,
      "from_name": "Marketing Team",
      "from_email": "marketing@example.com",
      "reply_to": "reply@example.com",
      "status": "verified",
      "created_at": "2025-01-15T10:30:00Z",
      "updated_at": "2025-01-15T10:30:00Z"
    }
  ]
}
```

{% endcode %}

Error Responses

Status Code	Error Code	Description
401	UNAUTHORIZED	User is not authorized
404	CHANNEL_NOT_FOUND	Channel not found or doesn't belong to user's organization

***

POST /api/v1/channels/{channel_id}/sender-domains/{domain_id}/validate

URL Parameters

Parameter	Type	Required	Description
channel_id	integer	Yes	Email channel ID
domain_id	integer	Yes	Sender domain ID

Body No request body required.

Response

Success Response (200 OK)

{% code title="Response (application/json)" %}

```json
{
  "id": 1,
  "domain": "example.com",
  "status": "verified",
  "mail_cname_status": "pass",
  "dkim1_status": "pass",
  "dkim2_status": "pass",
  "dmarc_status": "pass",
  "created_at": "2025-01-15T10:00:00Z",
  "updated_at": "2025-01-15T10:30:00Z"
}
```

{% endcode %}

Error Code Reference

Status Code	Error Code	Description

404	CHANNEL_NOT_FOUND	Channel doesn't exist or doesn't belong to the organization
404	SENDER_DOMAIN_NOT_FOUND	Sender domain doesn't exist or doesn't belong to the channel
400	INVALID_REQUEST	Domain is missing required configuration (external_domain_id)

Behavior

{% stepper %}
{% step %}

Validate DNS records

Calls SendGrid API to check domain authentication.
{% endstep %}

{% step %}

Update database

Stores the latest DNS validation results.
{% endstep %}

{% step %}

Calculate status

Automatically computes overall domain status.
{% endstep %}

{% step %}

Return result

Sends updated domain information to frontend.
{% endstep %}
{% endstepper %}

20250619 Journey node performance

API proposals for Customer Journey node performance reporting. Compares v1 node-only endpoint vs v2 combined journey + node report design.

Overview

This doc proposes API designs for **Customer Journey performance reporting**, with a focus on **node-level performance**.

It compares:

* a **v1 node report endpoint** (node-only response)
* a **v2 report endpoint** that returns both **journey summary + per-node metrics** (preferred)
* an option to extend the existing **Get Journey** API with optional date params

{% hint style="info" %}
Keywords: journey node performance, journey report API, message sent, open count, click metrics, transactions, revenue, date range, v1, v2
{% endhint %}

Related:

* [202302 Journey Architecture & Design](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202302-journey-architecture-and-design)
* [Journey Troubleshooting Knowledge Base](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/troubleshooting-and-faq/journey-troubleshooting-knowledge-base)

Problem

We need a consistent API to support:

* **Journey Report** (overall performance)
* **Node performance** (per-node cards / canvas overlay)
* a clear **date range filter** with stable metric definitions

Goal

* Avoid multiple round trips for journey + node metrics.
* Reduce UI inconsistency risk (time gaps between APIs).
* Keep the payload shape easy to cache and index.

Proposed solutions

{% stepper %}
{% step %}

Proposal 1 — Separate Node Performance API

Get Journey Node Performance Data API (new api)

Description: This API retrieves performance metrics for each node in a specified journey within a given date range. Metrics include message sends, opens, clicks, transactions, and revenue.

Endpoint GET /journey/v1/journey/{journey_id}/nodes/report/

Query Parameters

Name	Type	Required	Description	Example
start_date	string	Yes	Start date (inclusive), format: YYYY-MM-DD	2025-06-09
end_date	string	Yes	End date (inclusive), format: YYYY-MM-DD	2025-06-20

Example Request

GET /journey/v1/journey/123/nodes/report/?start_date=2025-06-09\&end_date=2025-06-20

Success Response (200 OK)

```json
[
 {
  "id": 1,
  "message_sent": 0,
  "message_pushed": 0,
  "open_count": 0,
  "clicks": 0,
  "unique_clicks": null,
  "adds_to_cart": 0,
  "transactions": 0,
  "transaction_revenue": 0.0,
  "clicks_of_share": null,
  "unique_clicks_of_share": null,
  "traffic_count": 0,
  "last_updated_at": "2025-06-19T16:00:46.776942Z"
 }
]
```

Response Fields

Field	Type	Description	Note
id	integer	Node ID	
message_sent	integer	Number of messages sent	
message_pushed	integer	Number of messages pushed	

open_count	integer	Number of message opens	
clicks	integer	Number of total clicks		
unique_clicks	integer	Number of unique users who clicked	
adds_to_cart	integer	Items added to cart		
transactions	integer	Number of transactions		
transaction_revenue	float	Total revenue from transactions	
clicks_of_share	integer	Clicks from shared messages	not used (copied from journey report api)
unique_clicks_of_share	integer	Unique clicks from shared messages	not used (copied from journey report api)
traffic_count	integer	Total traffic count		
last_updated_at	datetime	Last update time in ISO 8601 format	not used (copied from journey report api)

Error Responses

Status Code	Description	Example	
400	Bad request	{"detail": "start_date is required."}	
404	Journey not found	{"detail": "Journey not found."}	
401	Unauthorized	{"detail": "Authentication credentials were not provided."}	
{% endstep %}			

{% step %}

Proposal 2 — Journey Performance Data API (v2) \[Preferred]

Get Journey Performance Data API (new v2 api)

Description: This API retrieves performance metrics for both journey and node in a specified journey within a given date range. Metrics include message sends, opens, clicks, transactions, and revenue.

Endpoint GET /journey/v2/journey/{journey_id}/report/

Query Parameters

Name	Type	Required	Description	Example
start_date	string	Yes	Start date (inclusive), format: YYYY-MM-DD	2025-06-09
end_date	string	Yes	End date (inclusive), format: YYYY-MM-DD	2025-06-20

Example Request

GET /journey/v1/journey/123/report/?start_date=2025-06-09\&end_date=2025-06-20

Success Response (200 OK)

```json
{
  "message_sent": 0,
  "open_count": 3,
  "clicks": 3,
  "unique_clicks": null,
  "adds_to_cart": 0,
  "transactions": 0,
  "transaction_revenue": 0.0,
  "traffic_count": 2,
  "last_updated_at": "2025-06-19T16:00:46.776942Z",
  "node": [
    {
      "id": 1,
      "message_sent": 0,
      "open_count": 2,
      "clicks": 0,
      "unique_clicks": null,
      "adds_to_cart": 0,
      "transactions": 0,
      "transaction_revenue": 0.0,
      "traffic_count": 2
    },
    {
      "id": 2,
      "message_sent": 0,
      "open_count": 1,
      "clicks": 3,
      "unique_clicks": null,
      "adds_to_cart": 0,
      "transactions": 0,
      "transaction_revenue": 0.0,
      "traffic_count": 1
    }
  ]
}
```

Response Fields

Field	Type	Description	Note
id	integer	Node ID	
message_sent	integer	Number of messages sent	

open_count	integer	Number of message opens	
clicks	integer	Number of total clicks	
unique_clicks	integer	Number of unique users who clicked	
adds_to_cart	integer	Items added to cart	
transactions	integer	Number of transactions	
transaction_revenue	float	Total revenue from transactions	
traffic_count	integer	Total traffic count	
last_updated_at	datetime	Last update time in ISO 8601 format	

Error Responses

Status Code	Description	Example
400	Bad request	{"detail": "start_date is required."}
404	Journey not found	{"detail": "Journey not found."}
401	Unauthorized	{"detail": "Authentication credentials were not provided."}

Rationale for preferring proposal 2:

* Journey performance is the sum of node performance; returning both journey and node data in one API is more efficient and avoids repetitive calculations.
* Using one API reduces risk of time gaps between separate APIs causing UI data inconsistency.
  {% endstep %}

{% step %}

Proposal 3 — Extend Get Journey API with optional dates

Get Journey API endpoint: GET /journey/v2/journey/{journey_id}/

Query Parameters

Name	Type	Required	Description	Example
start_date	string	False	Start date (inclusive), format: YYYY-MM-DD	2025-06-09
end_date	string	False	End date (inclusive), format: YYYY-MM-DD	2025-06-20

Example Response (excerpt)

```json
{
  "id": 22656,
  "bot_id": 1,
  "name": "gideon only",
  ...
  "nodes": [
    {
```

```
      "id": 115155,
      "journey_id": 22656,
      "type": "tag_added",
      "performance": {
        "message_sent": 0,
        "open_count": 2,
        "clicks": 0,
        "unique_clicks": null,
        "adds_to_cart": 0,
        "transactions": 0,
        "transaction_revenue": 0.0,
        "traffic_count": 2,
        "unique_contact_count": 5,
        "unique_url_click_count": 10
      }
    }
  ],
  "paths": [
    {
      "id": 146939,
      "source_node_id": 115157,
      "target_node_id": 115156,
      "index": 0,
      "performance": {
        "traffic_count": 60,
        "traffic_ratio": 0.6,
        "unique_contact_count": 60,
        "unique_contact_ratio": 0.6,
        "type": "send_message"
      }
    }
  ],
  "performance": {
    "message_sent": 0,
    "open_count": 2,
    "clicks": 0,
    "unique_clicks": null,
    "adds_to_cart": 0,
    "transactions": 0,
    "transaction_revenue": 0.0,
    "traffic_count": 2,
    "unique_contact_count": 5,
    "unique_url_click_count": 10,
    "last_updated_at": "2025-05-26T15:22:42.945223+08:00"
  }
}
```

Notes about data structure differences:

* Different node types have different performance data:
  * trigger node: traffic_count
  * send message: traffic_count, message_sent, open_count, clicks, transactions, transaction_revenue
  * yes/no branch: traffic_count
  * time interval nodes: traffic_count
  * exit node: traffic
* There is a question whether some stats should be shown on paths/edges rather than nodes; follow-up required.
  {% endstep %}
  {% endstepper %}

Decision

Prefer proposal 2.

Reasons:

* Journey performance equals the sum of node performance, so one API that returns both avoids repetitive calculations.
* Single API reduces the possibility of time gaps between two separate API responses leading to UI data inconsistency.

Next steps (TODO)

<details>

<summary>Open items</summary>

* Confirm metric definitions with data pipeline (unique click, unique open).
* Confirm whether path/edge performance is required in v2.
* Decide caching strategy for report payload (per journey + date range).

</details>

202510 EDM in Journey onboaring (admin center)

Admin Center API design for Email/EDM channel onboarding. Includes sender domains, sender profiles, validation, and channel status rules.

Overview

This doc captures the **Admin Center** side of **Email/EDM onboarding**.

It defines the **Email channel** endpoints and response shapes used to display and validate:

* sender domains (DNS authentication)
* sender profiles
* email channel status (`not_set`, `connected`, `warning`, `suspended`)

{% hint style="info" %}
Keywords: Admin Center, EDM onboarding, email channel, sender domain, sender profile, SendGrid validation, channel status, hard bounce, spam rate
{% endhint %}

Related:

* [202510 EDM (Email) in Customer Journey — Architecture, Token Exchange, and API Design](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202510-edm-email-in-customer-journey-architecture-token-exchange-and-api-design)
* [202510 EDM in Journey onboaring contact management_](https://cresclab-2.gitbook.io/cresclab-docs/gAzPwdkR3tnk8rZNAvnP/cresclab-library/automation/customer-journey/system-design/202510-edm-in-journey-onboaring-contact-management_)

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* `GET /api/v1/channels`

GET /api/v1/channels/{channel_id}/sender-domains

Success Response (200 OK):

```json
[
  {
    "id": 1,
    "domain": "example1.com",
    "status": "verified",
    "mail_cname_status": "pass",
    "dkim1_status": "pass",
    "dkim2_status": "pass",
    "dmarc_status": "pass",
    "created_at": "2024-01-01T00:00:00Z",
    "updated_at": "2024-01-01T00:00:00Z"
  },
  {
    "id": 2,
```

```
    "domain": "example2.com",
    "status": "warning",
    "mail_cname_status": "pass",
    "dkim1_status": "fail",
    "dkim2_status": "pass",
    "dmarc_status": "pass",
    "created_at": "2024-01-01T00:00:00Z",
    "updated_at": "2024-01-01T00:00:00Z"
  },
  {
    "id": 3,
    "domain": "example3.com",
    "status": "failed",
    "mail_cname_status": "fail",
    "dkim1_status": "fail",
    "dkim2_status": "fail",
    "dmarc_status": "pass",
    "created_at": "2024-01-01T00:00:00Z",
    "updated_at": "2024-01-01T00:00:00Z"
  }
]
```

<details>

<summary>Error Responses</summary>

Status Code	Error Code	Description
400	BAD_REQUEST	Invalid request
401	UNAUTHORIZED	Missing or invalid JWT token
404	CHANNEL_NOT_FOUND	Channel does not exist or doesn't belong to the organization

</details>

***

GET /api/v1/channels/{channel_id}/sender-profiles

Description

Get all sender profiles for a specific email channel

Path Parameters

* channel_id (integer, required): The ID of the email channel

Response

Success (200 OK)

```json
[
 {
  "id": 2,
  "name": "Aaren test",
  "from_email": "aaren@marketing.cresclab.site",
  "reply_to": "aaren@marketing.cresclab.site",
  "status": "verified",
  "created_at": "2025-11-15T03:12:33.606Z",
  "updated_at": "2025-11-15T03:12:33.606Z"
 }
]
```

<details>

<summary>Error Responses</summary>

Status Code	Error Code	Description
401	UNAUTHORIZED	User is not authorized
404	CHANNEL_NOT_FOUND	Channel not found or doesn't belong to user's organization

</details>

***

POST /api/v1/channels/{channel_id}/sender-domains/{domain_id}/validate

URL Parameters

Parameter	Type	Required	Description
channel_id	integer	Yes	Email channel ID
domain_id	integer	Yes	Sender domain ID

Body

No request body required.

Response

Success Response (200 OK)

```json
{
  "id": 1,
  "domain": "example.com",
  "status": "verified",
  "mail_cname_status": "pass",
  "dkim1_status": "pass",
  "dkim2_status": "pass",
  "dmarc_status": "pass",
  "created_at": "2025-01-15T10:00:00Z",
  "updated_at": "2025-01-15T10:30:00Z"
}
```

<details>

<summary>Error Code Reference</summary>

Status Code	Error Code	Description
404	CHANNEL_NOT_FOUND	Channel doesn't exist or doesn't belong to the organization
404	SENDER_DOMAIN_NOT_FOUND	Sender domain doesn't exist or doesn't belong to the channel
400	INVALID_REQUEST	Domain is missing required configuration (external_domain_id)
502	EXTERNAL_SERVICE_ERROR	External service error (see body)

Example External Service Error (SendGrid):

```json
{
  "code": "EXTERNAL_SERVICE_ERROR",
  "message": "[SendGrid API Error] {原始錯誤訊息}"
}
```

Example configuration error (e.g., missing API key):

```json
{
  "code": "INVALID_REQUEST",
  "message": "Channel XX does not have SendGrid API key configured"
}
```

</details>

Behavior

{% stepper %}
{% step %}

Validates DNS records

Calls SendGrid API to check domain authentication.
{% endstep %}

{% step %}

Updates database

Stores the latest DNS validation results.
{% endstep %}

{% step %}

Calculates status

Automatically computes overall domain status.
{% endstep %}

{% step %}

Returns result

Sends updated domain information to frontend.
{% endstep %}
{% endstepper %}

***

GET /api/v1/channels

Success (200 OK)

```json
{
  "channels": [
    {
      "id": 1,
      "organization_id": 1,
      "uuid": "431c1b10-af57-4402-ad3e-df7da3cb0e2a",
```

      "name": "EDM_test",
      "type": "email",
      "status": "connected",
      "external_channel_id": "cresclab.site",
      "channel_information": {
       "sender_domains": [
        {
          "id": 1,
          "domain": "marketing.cresclab.site",
          "status": "verified"
        }
       ],
       "sender_profiles": [
        {
          "id": 2,
          "from_email": "aaren@marketing.cresclab.site",
          "status": "verified"
        }
       ]
      }
     }
    ]
}
```

Email channel status codes (email channel status code 會有的值)

| Status | 值 | 觸發原因 |
| --------- | --------- | ------------------------------------------------------------------------- |
| NOT\_SET | not\_set | 沒有任何已驗證的 sender profile |
| CONNECTED | connected | 有至少一個已驗證的 sender profile 且指標正常 |
| WARNING | warning | Hard Bounce: rate > 2% AND count > 10 OR Spam: rate > 0.3% AND count > 5 |
| SUSPENDED | suspended | Hard Bounce: rate > 5% AND count > 20 OR Spam: rate > 0.5% AND count > 10 |

規則：

* WARNING → SUSPENDED: 可自動升級

* WARNING / SUSPENDED → CONNECTED: 不會自動恢復，需手動處理

* SUSPENDED: 最終狀態，需要人工介入才能恢復

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