HexaConnect

USER GUIDE

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Document History

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Version	0.1
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Company Name	Hexaview Technologies Inc.

Document Scope

This document is the user guide for HexaConnect, a product designed and developed by Hexaview Technologies Inc. It will guide you through the setup, features, and functionalities of HexaConnect, helping you to leverage its full potential.

1. Introduction to HexaConnect

1.1 Product Overview

Currently, businesses must use two separate systems to save the database of their users and connect with them on WhatsApp, leading to inefficiency and consuming more time.

HexaConnect is an innovative integration tool, built natively on Salesforce to seamlessly connect WhatsApp business and Salesforce, providing a power solution for enhancing customer communication and enhancing sales processes.

With HexaConnect, you can manage and automate WhatsApp conversations directly within Salesforce, ensuring a unified and efficient workflow.

1.2 Purpose

HexaConnect aims to fulfill the following objectives:

1. Enable users to easily initiate or respond to one-to-one WhatsApp messages using our application interface directly from Salesforce CRM. (In accordance with the WhatsApp messaging policy)
2. Enable users to use their existing CRM database and record lists to send or schedule messages to multiple recipients in one go.
3. Enable users to chat with their audience on WhatsApp inside the Salesforce sales console as well as using the utility chat box. If a record page of Case/Contact/Lead/Opportunity is opened, they can easily chat with them through the same page without navigating to the application.
4. Enable users to set automatic responses and actions based on the user's input. They can set triggers to initiate actions such as creating a case or opportunity, responding using a predefined message, etc.
5. Enable users to configure the pre-approved templates by Meta using variables and making them more dynamic and personalized.

2. Getting Started – Installation & Setup

2.1 App Installation

- Download the package either from AppExchange or the URL.
- Install the package in your Salesforce org.
- Installation Key - Hexa@1234

2.2 Meta Setup

To Create a Meta App (If already created, jump to Section 2.3)

2.2.1 Create a business account and portfolio on Meta: To create a business portfolio in Business Manager:

- Go to business.facebook.com/overview.
- Click Create Business Portfolio.
- Enter a name for your business, your name and work email address, and click Next.
- Enter your business details and click Submit.

2.2.2 How to find your business ID: To find your business ID in Meta Business Manager

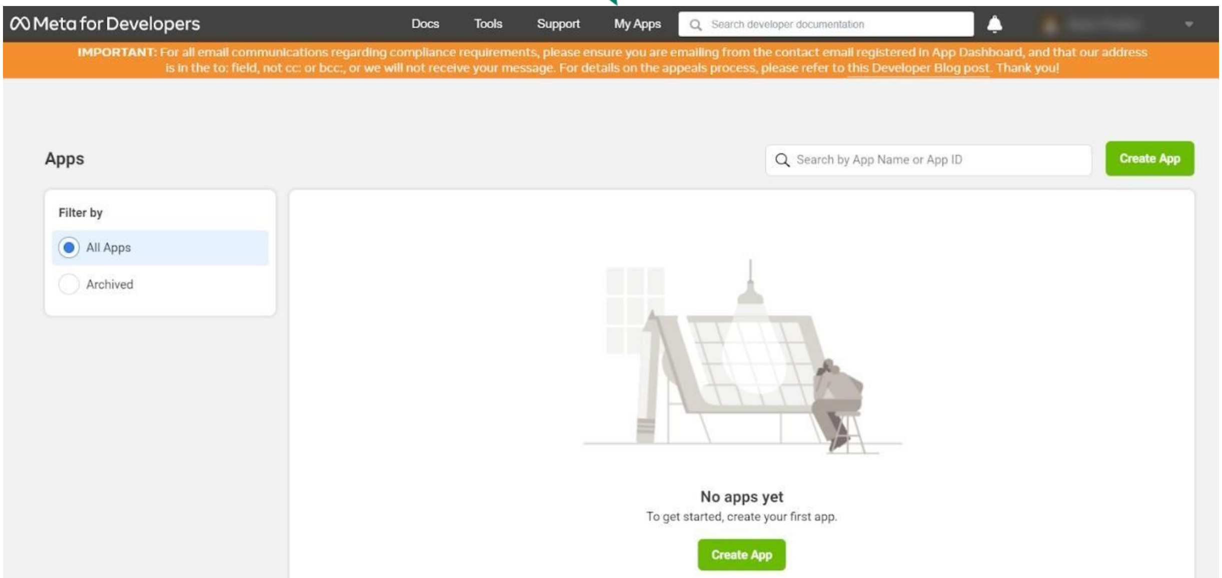
- Go to Business settings.
- Select Business info from the sidebar.
- Below your business portfolio name, you'll find your business ID number.
- Copy the business ID and save it.

2.2.3 Register as a Meta Developer

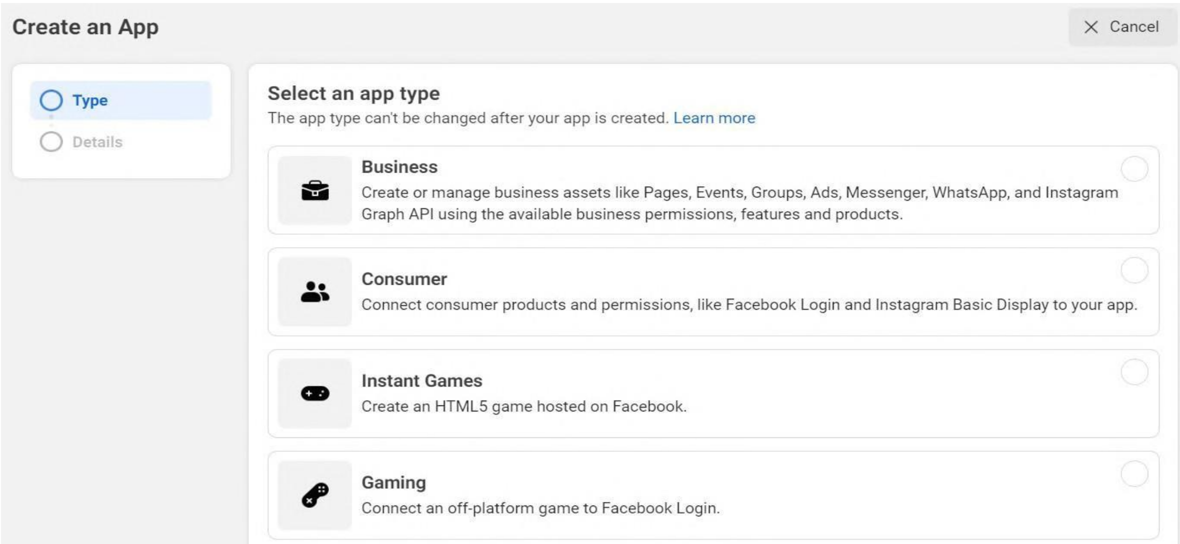
- While logged into your Facebook account, go to the registration page.
- Provide the necessary information and submit.

2.2.4 Create an App

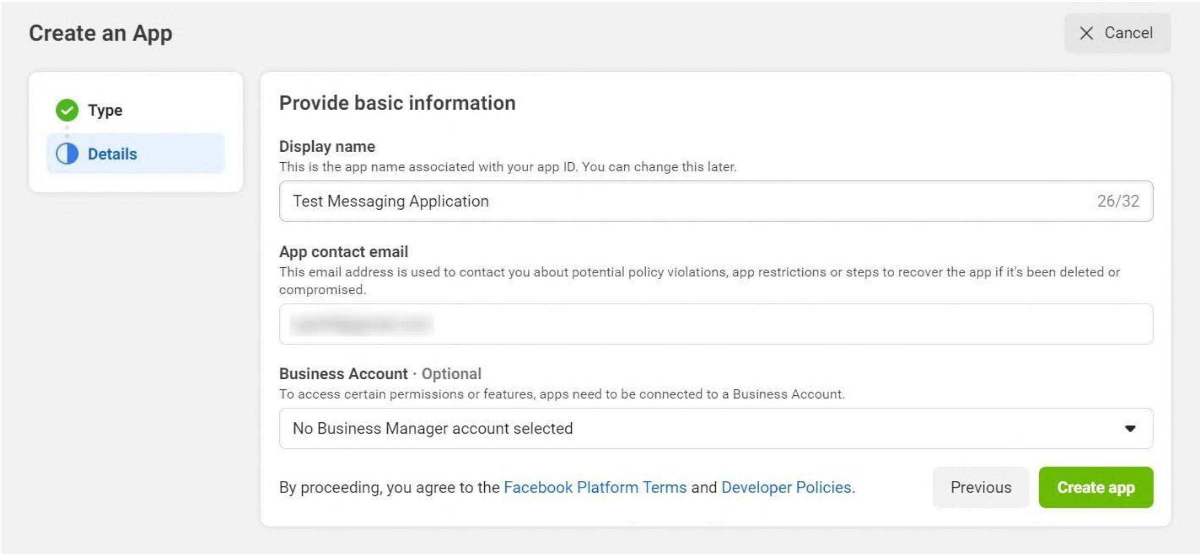
- Once you're signed in, you see the Meta for Developers App Dashboard. Click Create App to get started.



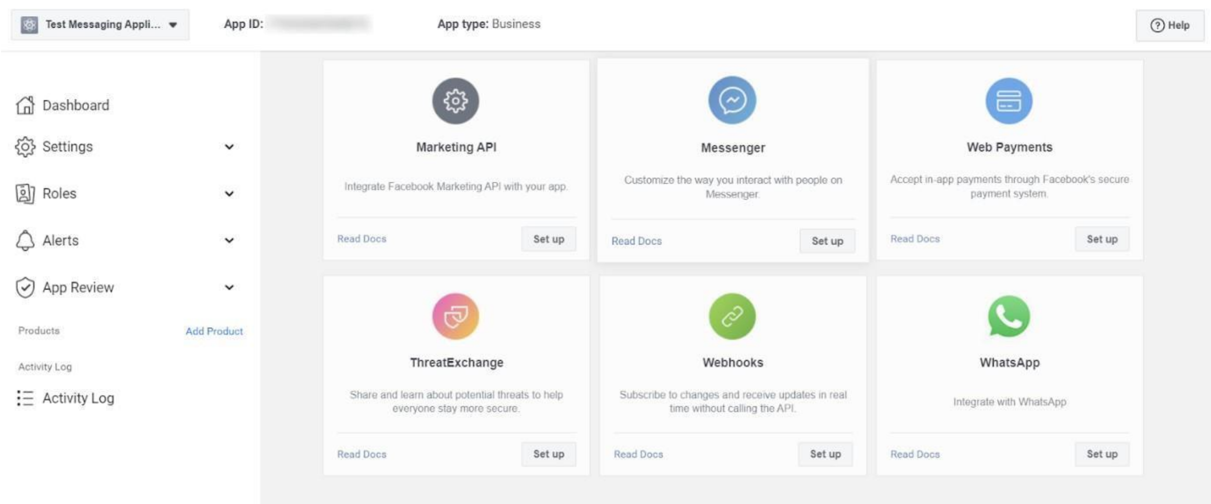
- Next, you'll need to choose an app type. Choose Business.



- After that, enter a display name for your application. If you have a business account to link to your app, select it. If not, don't worry. The Meta for Developers platform creates a test business account you can use to experiment with the API. When done, click Create App.



- Then, you'll need to add products to your app. Scroll down until you see WhatsApp and click the Set up button.
- Finally, choose an existing Meta Business Account or ask the platform to create a new one and click on Continue.



- And with that, your app is created and ready to use. You're automatically directed to the app's dashboard.

2.2.5 Configuration in the Meta App

- Go to 'Add Products' from the vertical menu and select WhatsApp.
- Navigate to API Setup in WhatsApp.
- Click on 'Add a phone number' and provide the requisite information.
- Again, navigate to 'API Setup in WhatsApp.
- Select the phone number.
- Copy 'Phone number ID' and 'WhatsApp Business Account ID' and save it.

2.2.6 Get the App ID and App Secret

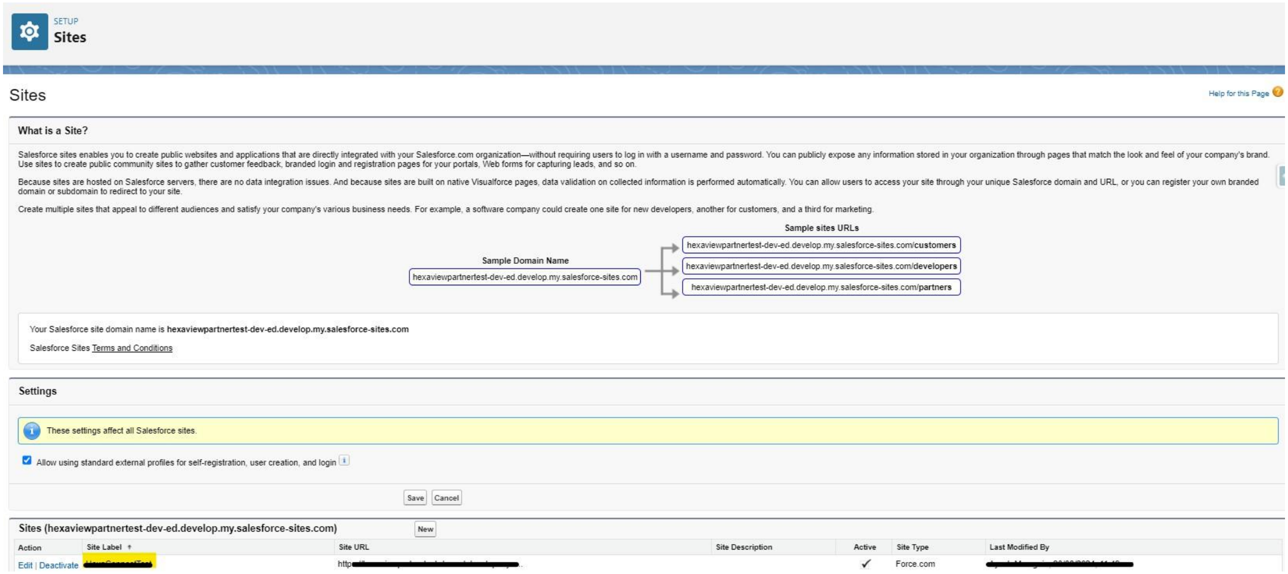
- In the app, go to 'App Settings' and choose 'Basic' from its drop-down menu.
- Copy the App ID and App Secret and save it.

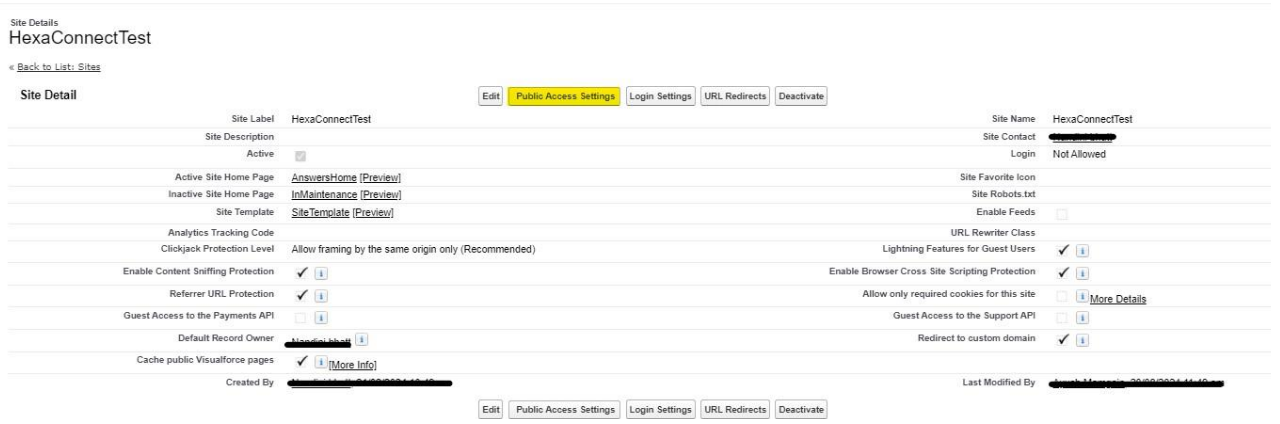
2.2.7 Creating a Permanent Access Token

- Go to Business Settings.
- Select the business account your app is associated with.
- Below Users, click System Users.
- Click Add.
- Name the system user, choose Admin as the user role, and click Create System User.
- Select the WhatsApp_business_messaging permission.
- Click Generate New Token.
- Copy and save your token.

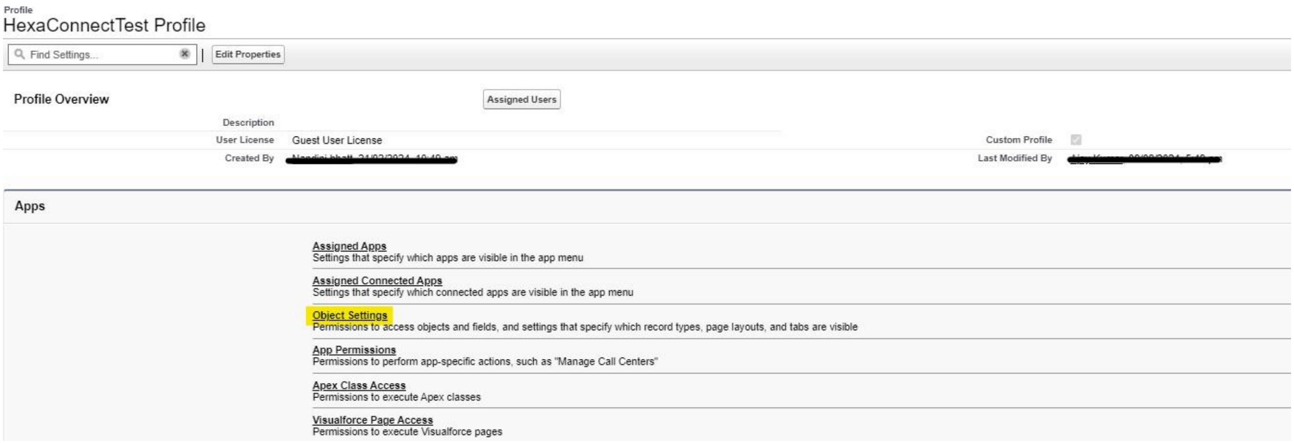
2.3 HexaConnect setup (post-installation and Meta configuration)

- Open Salesforce.org and go to setup.
- Create a site from Setup.
- After the creation of Site, click on the Site Label > Public Access Setting.

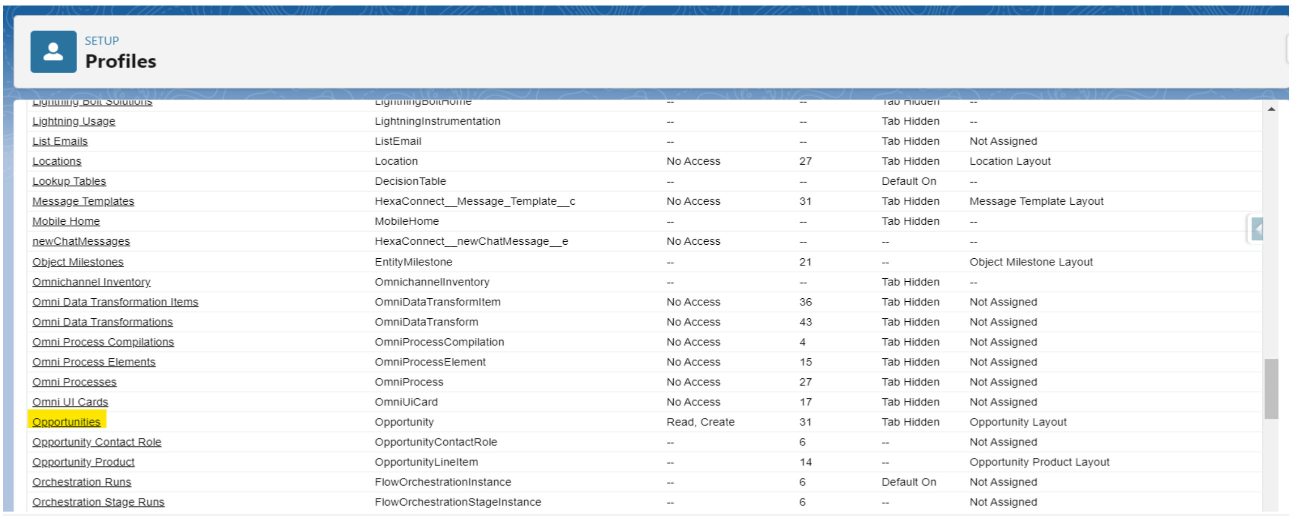


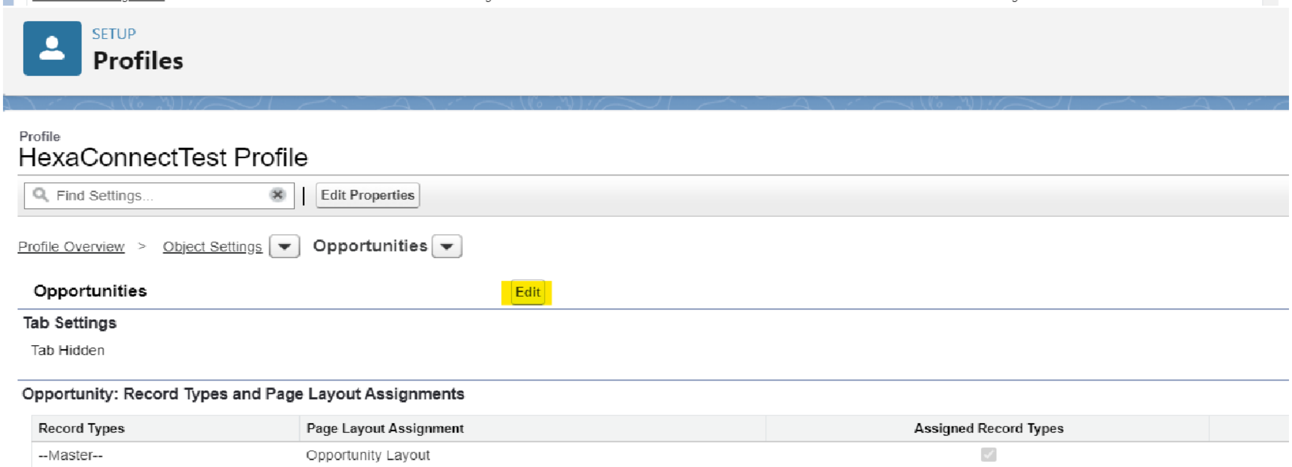


- Scroll down and click on Object Settings.

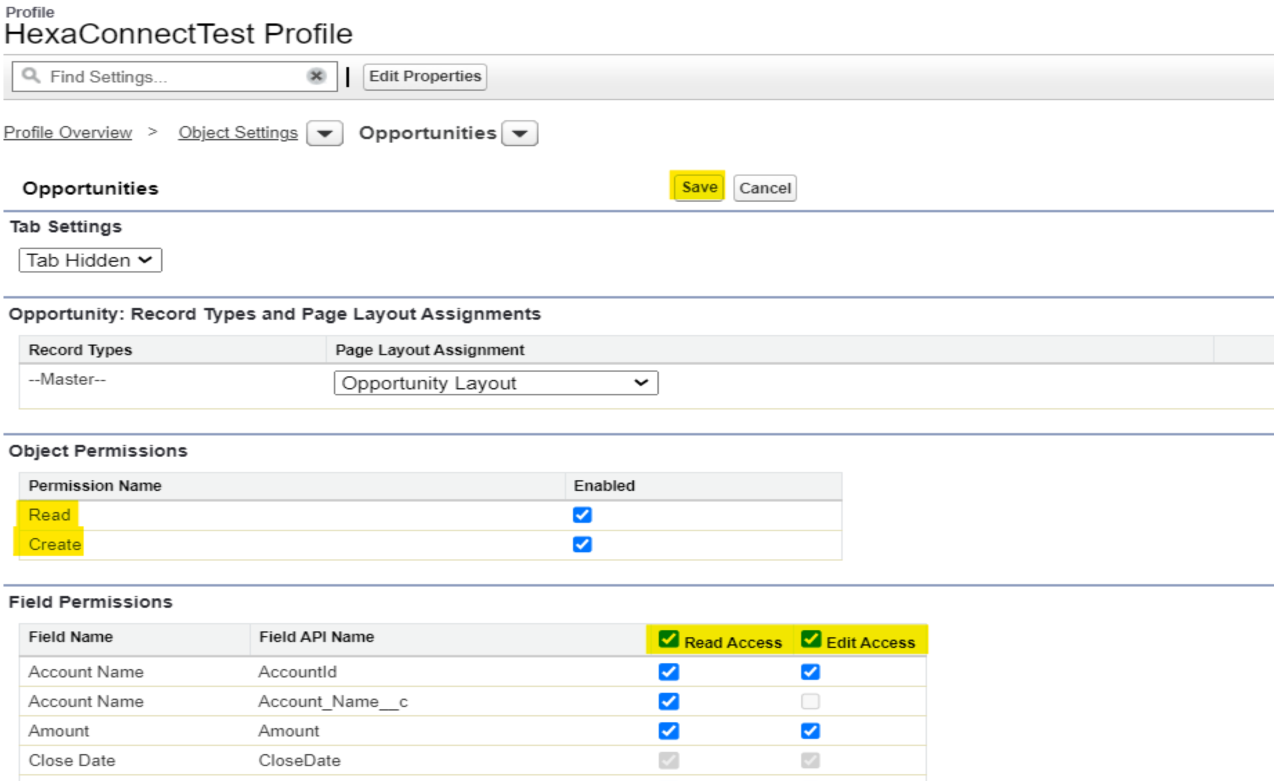


- From Objects Name choose Opportunity and click on Edit.





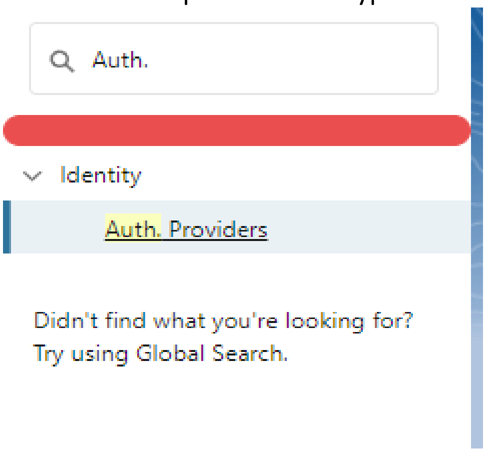
- Grant the **Read/Create** Object Permission and provide **Read and Edit Access** Field Permissions click Save.



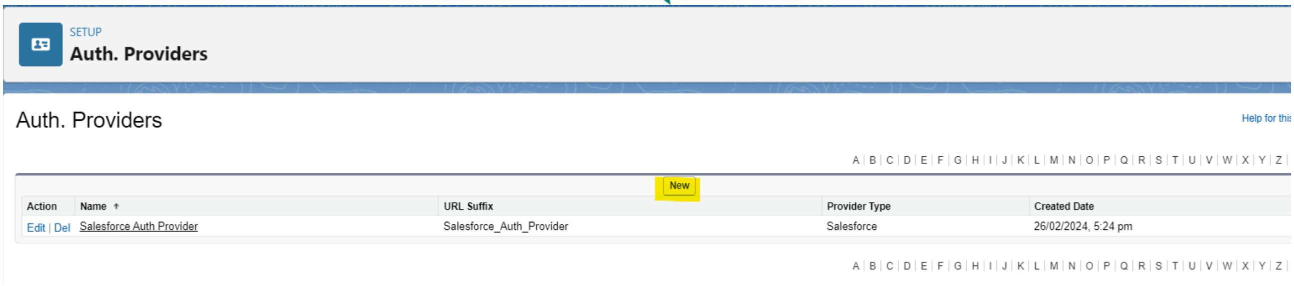
- **Repeat this process for Case and Lead object**

2.3.1 Auth. Provider Setup:

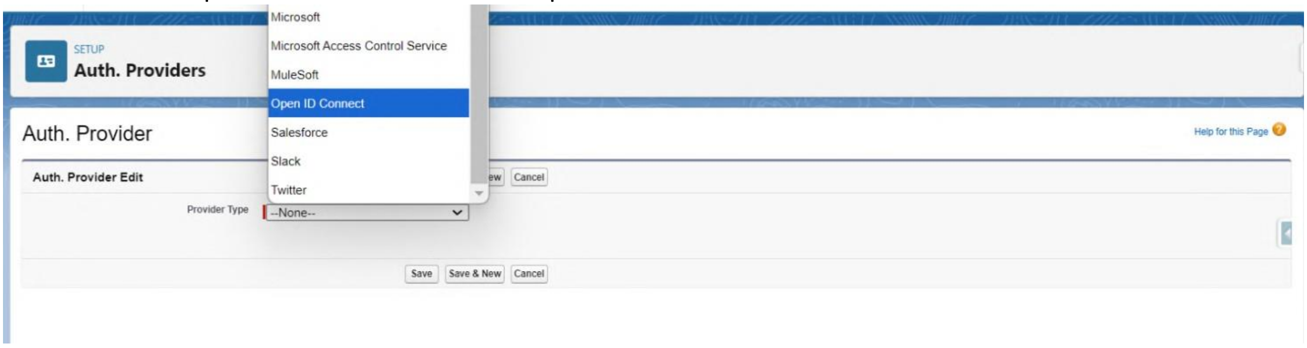
- In the quick find box type 'Auth' and click on Auth. Providers.



- Click on 'New' in Auth Provider



- Select ‘Open ID Connect’ from the dropdown.

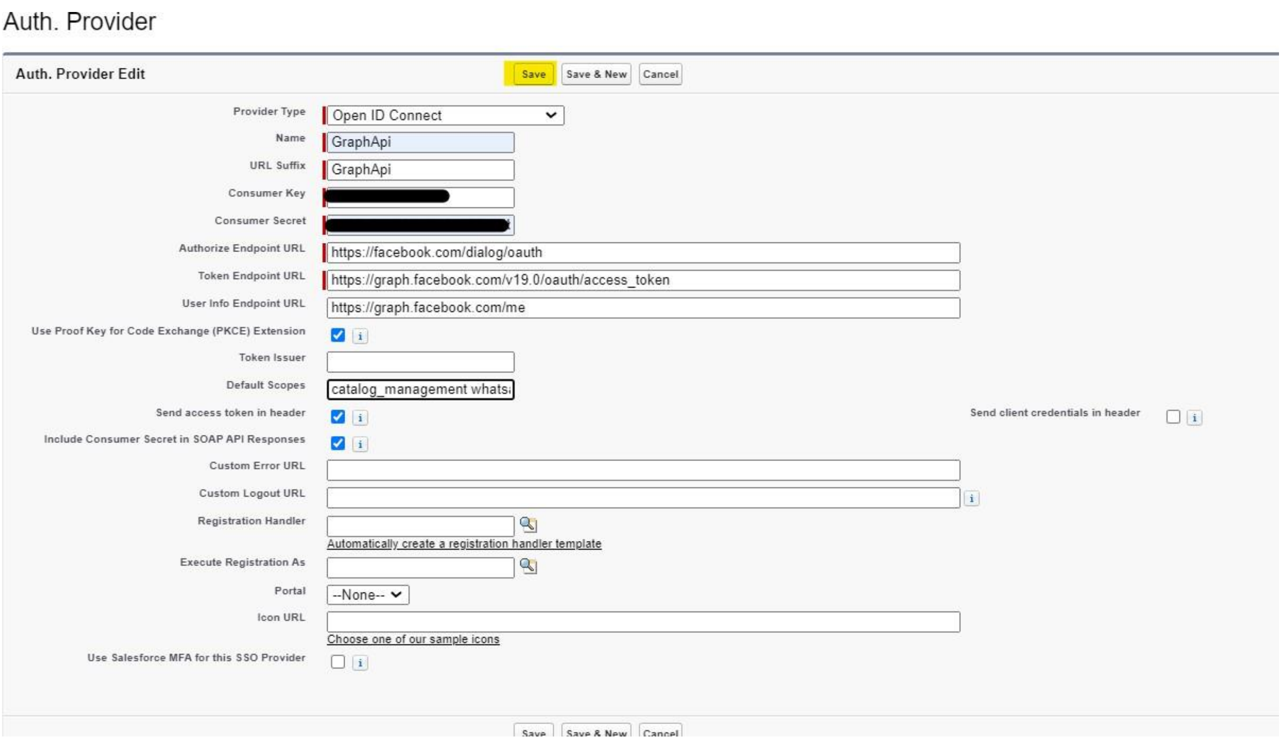


- Add GraphApi in ‘Name’
- Enter the following at:

Authorize Endpoint URL - https://facebook.com/dialog/oauth
Token Endpoint URL - https://graph.facebook.com/v19.0/oauth/access_token
User Info Endpoint URL - https://graph.facebook.com/me

- Next add the following default scopes:

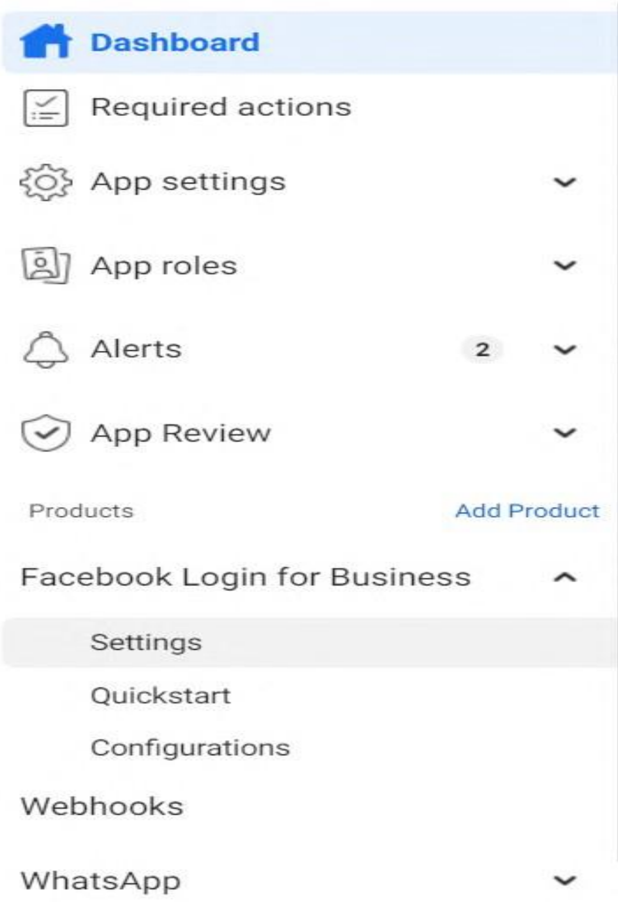
catalog_management whatsapp_business_messaging whatsapp_business_management public_profile email

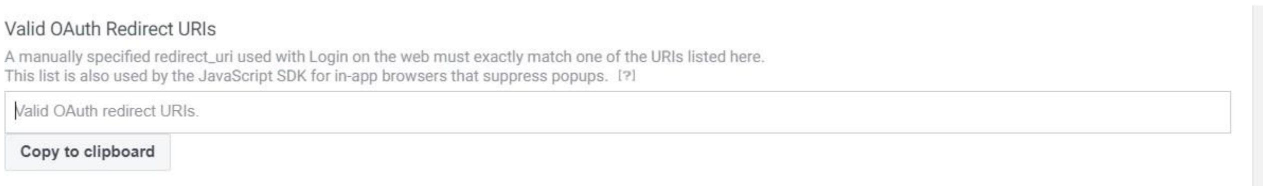


- Finally click on save.

- Next, Copy the Callback URL value present at the bottom of the page.

- Access the Meta settings, locate the Facebook Login for Business > Settings, and add the Callback URL to the Valid Redirect URL field and click Save Changes.

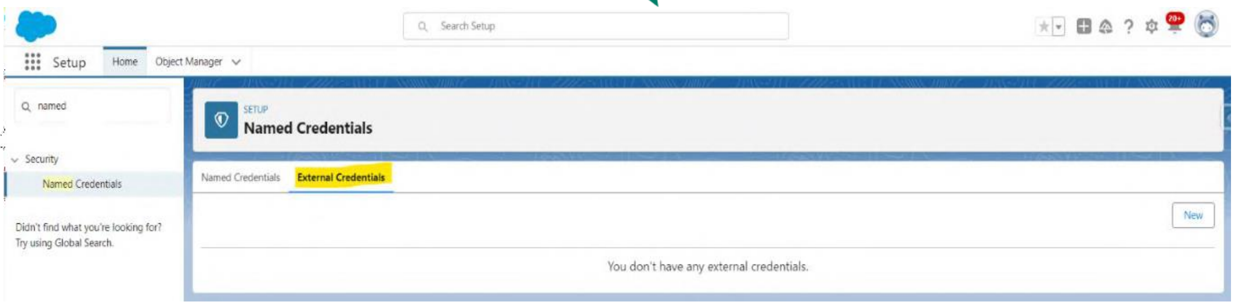




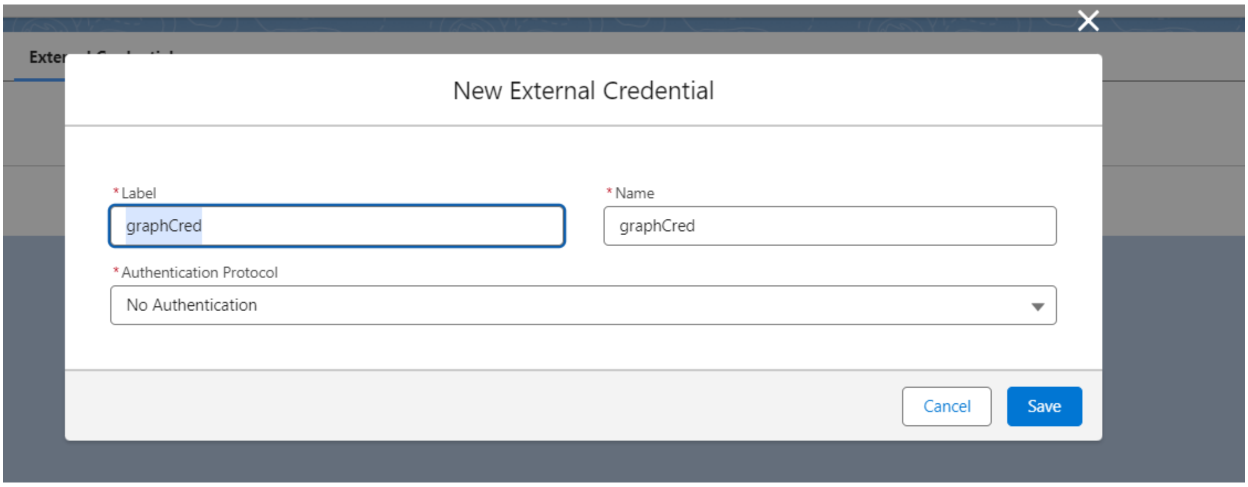
- Click on 'Save Changes' on the bottom right of the screen.

2.3.2 External Credentials Setup:

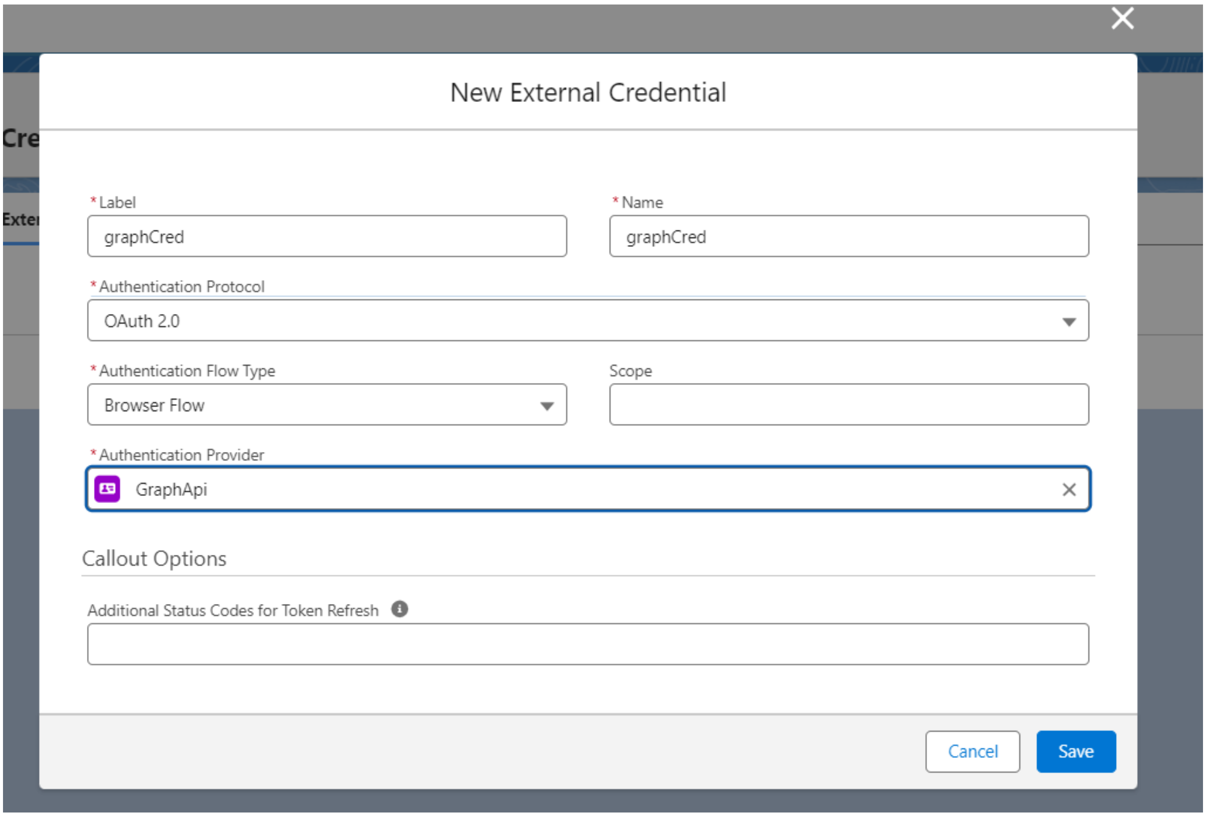
- Search Named Credentials in quick find box.
- In Named Credentials switch to External Credentials tab as shown in fig.



- Click on new.
- In Label enter ‘graphCred’ and Name as ‘graphCred’

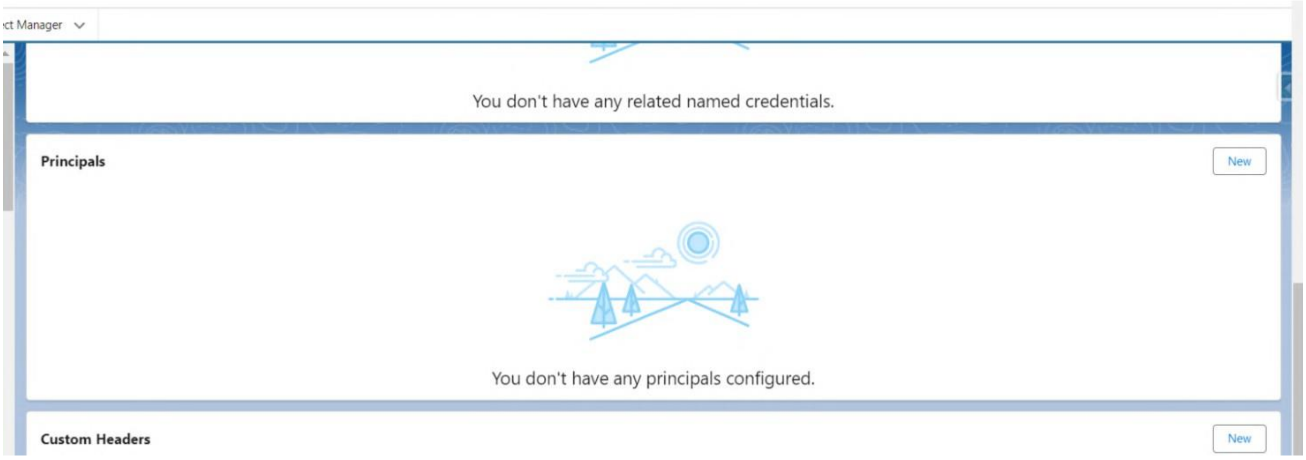


- In Authentication Protocol select OAuth 2.0, Authentication Flow Type – Browser Flow, In Authentication Type select GraphApi as Auth provider

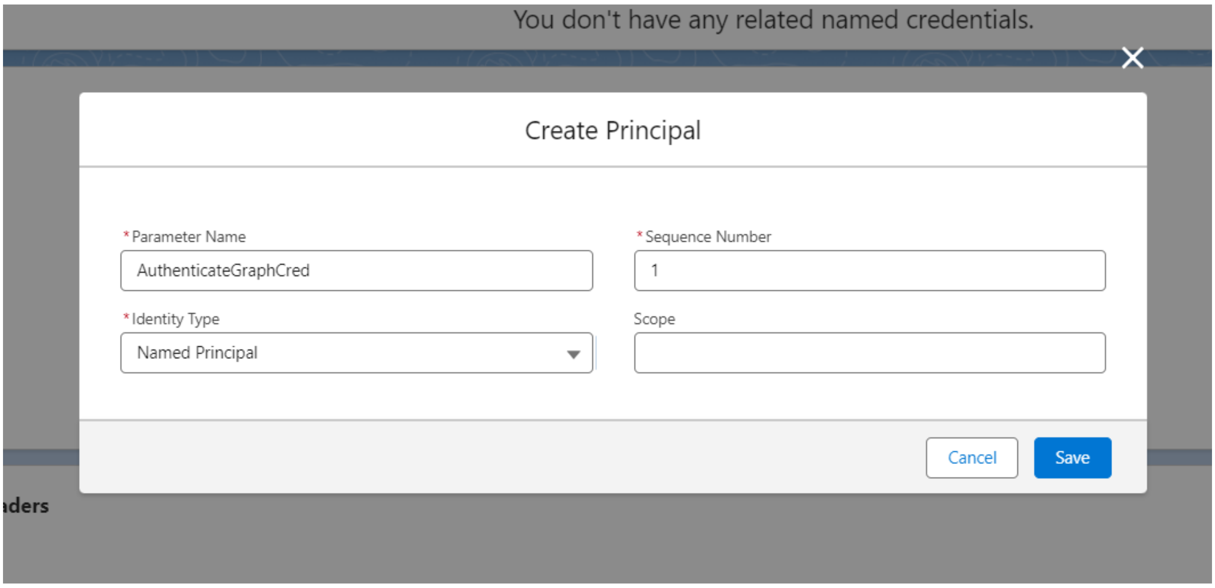


HexaConnect

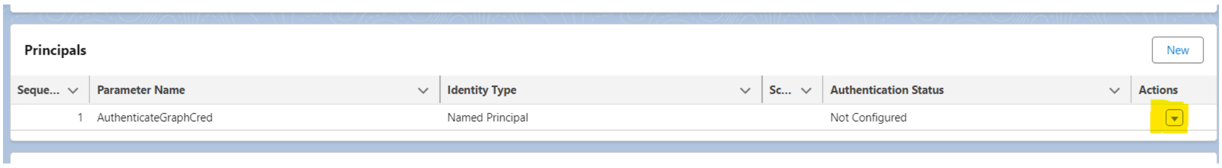
- Click on save.
- Now, in External credentials scroll down to Principals and click on new



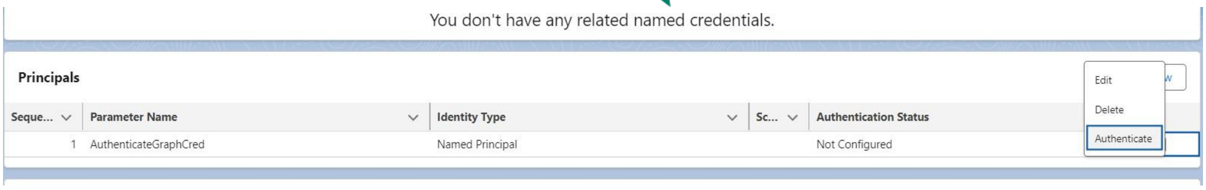
- In Parameter Name add 'AuthenticateGraphCred' and Identity Type as 'Named Principal'.



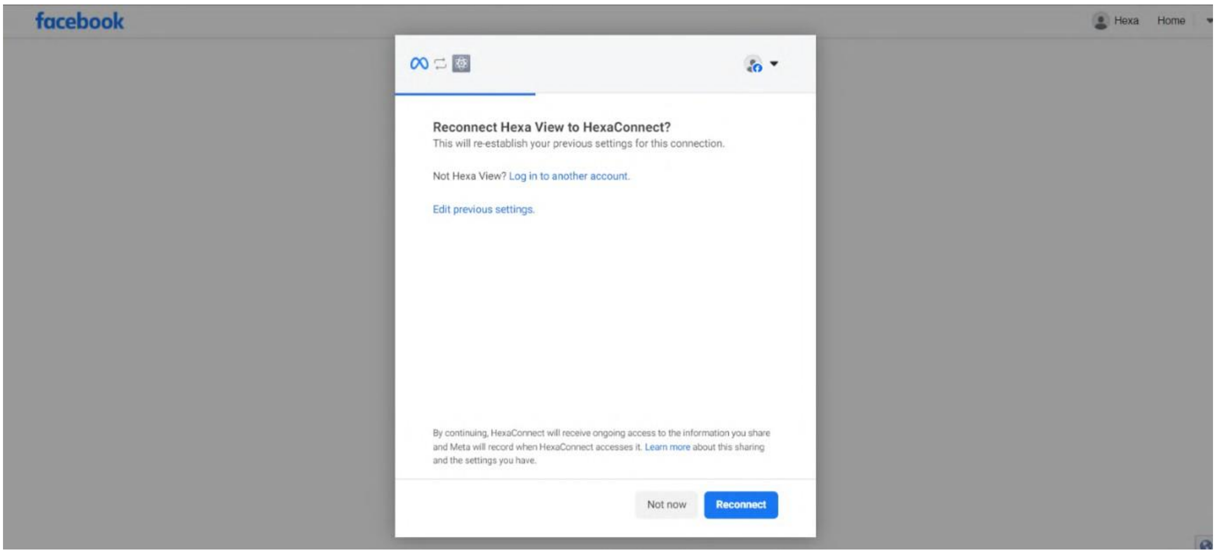
- Click on Save.
- Click on Action.



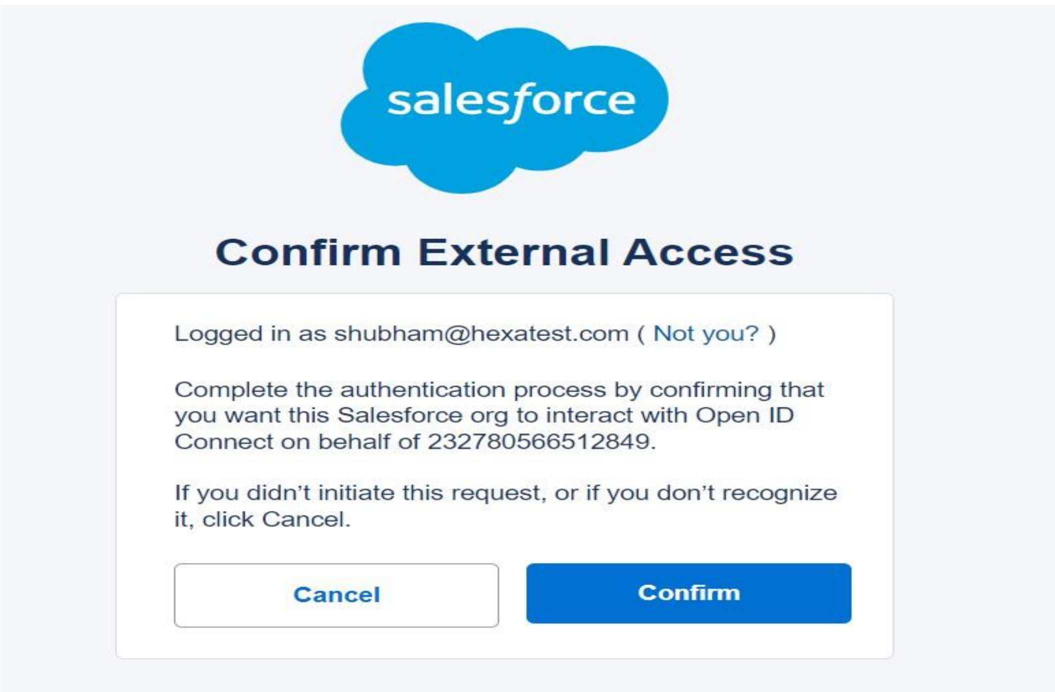
- Click on Authenticate

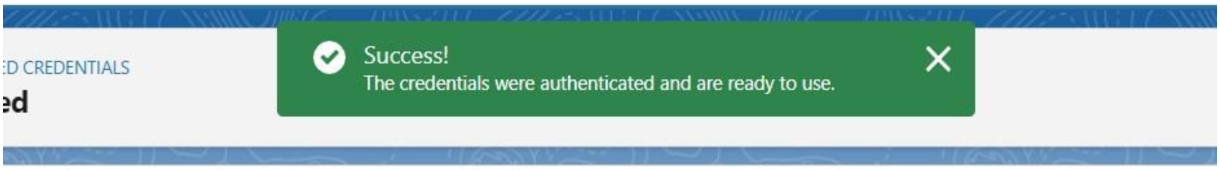


- Click on Connect/Reconnect.

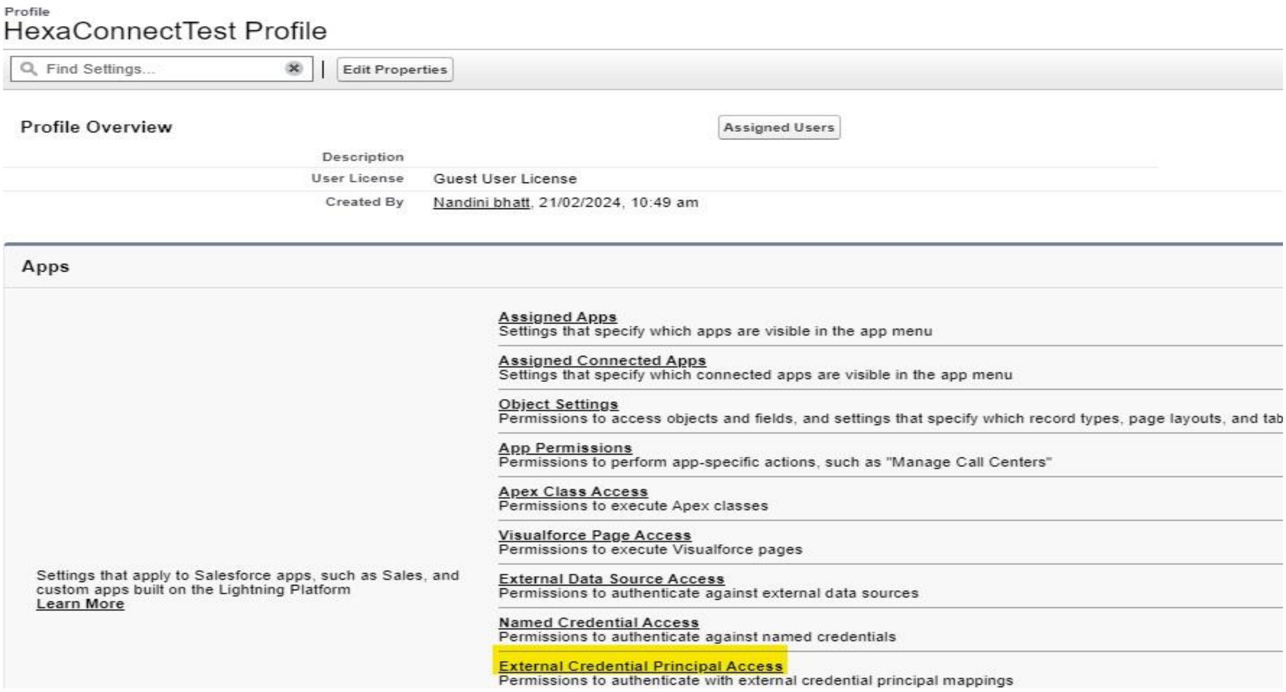


- Click on Confirm

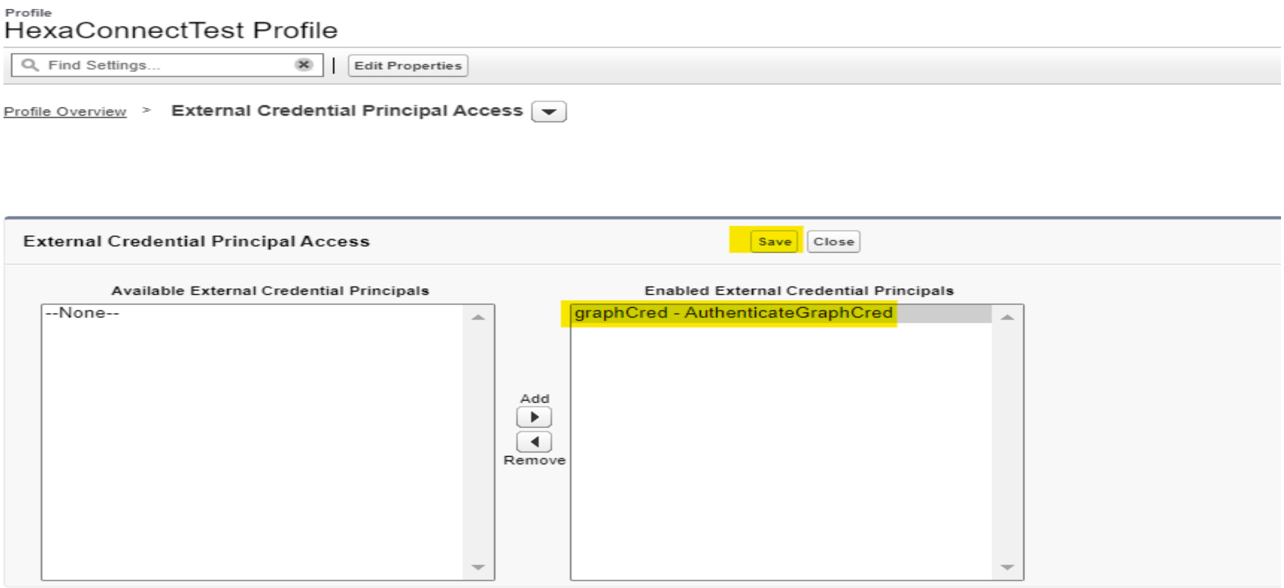




- Now again go to ‘sites’ from the quick find box and click on ‘site label’.
- Click on ‘Public Access Setting’, scroll down and click on ‘External Credential Principal Access’.



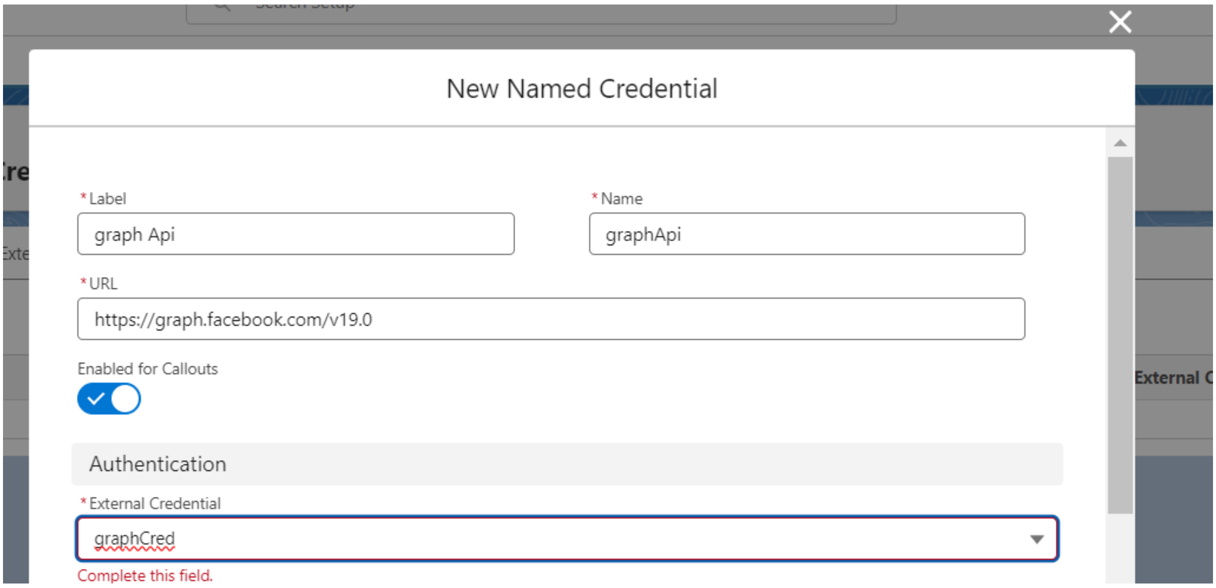
- Click on Edit and Add ‘graphCred-AuthenticateGraphCred’ to Enabled External Credential Principals and click on Save.



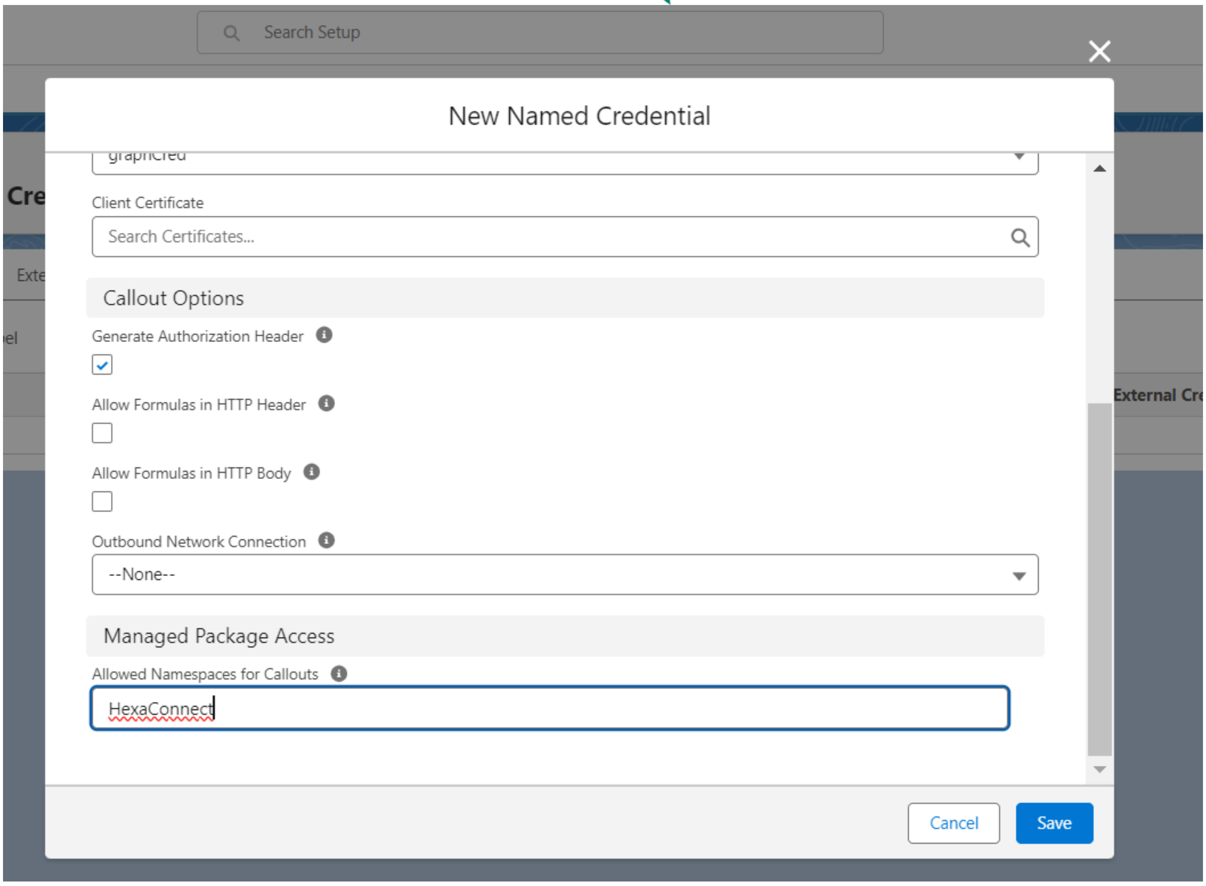
2.3.3 Named Credentials Setup:

2.3.3.1 'graphApi' Named Credential:

- Search for 'Named Credential' in quick find box
- Click on 'New' on the top right of the screen.
- In Label enter 'graph Api' and in Name 'graphApi'
- In URL enter - https://graph.facebook.com/v19.0
- Set Enabled for Callouts to true.
- In External Credential add 'graphCred'



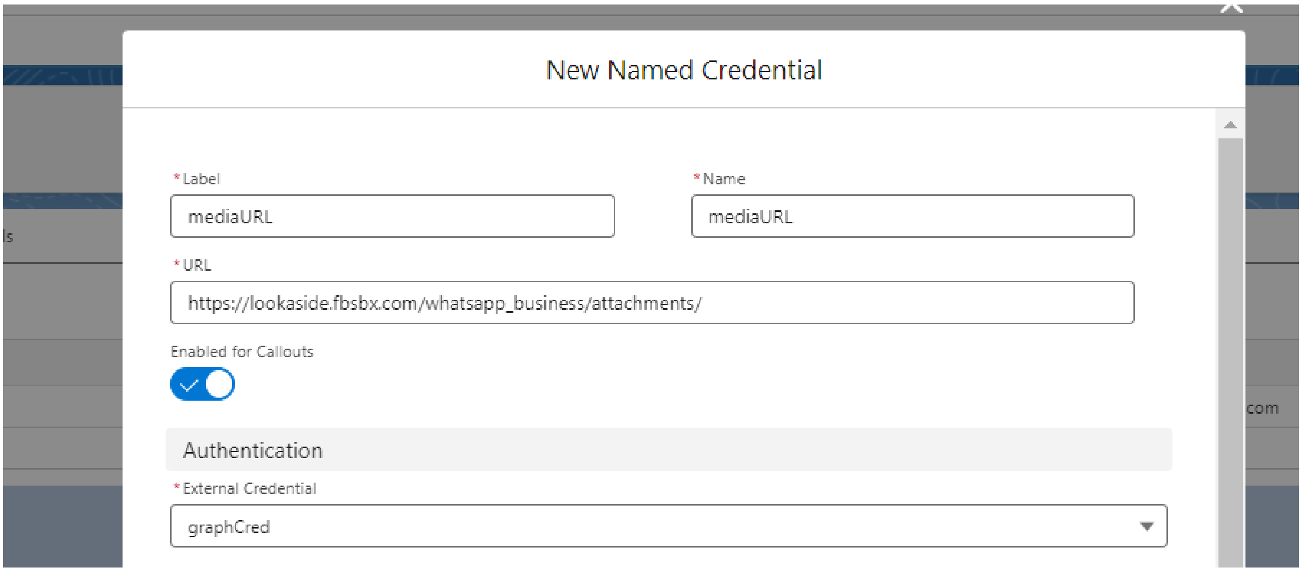
- In Callout Options 'check' Generate Authorization Header.
- In Managed Package Access enter 'HexaConnect' below Allowed Namespaces for Callouts.



- Finally, click on ‘Save’.

2.3.3.2 ‘mediaURL’ Named Credential

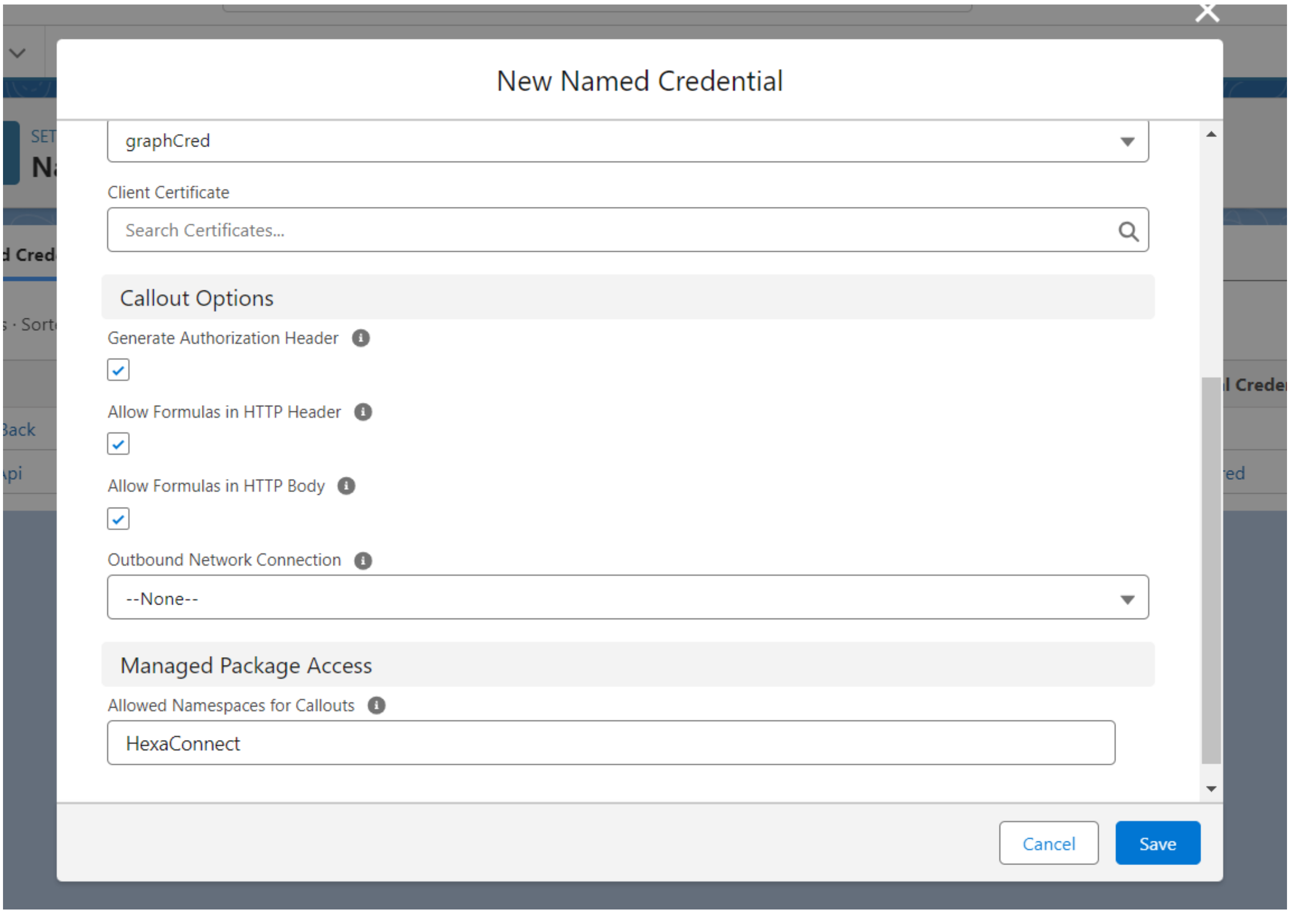
- Click on ‘New’ on the top right of the screen.
- In Label enter ‘mediaURL’ and in Name ‘mediaURL’
- In URL enter - https://lookaside.fbsbx.com/whatsapp_business/attachments/
- Set Enabled for Callouts to true.
- In External Credential add ‘graphCred’



- In Callout Options ‘check’ Generate Authorization Header, Allow Formulas in HTTP Header and Allow

Formulas in HTTP Body.

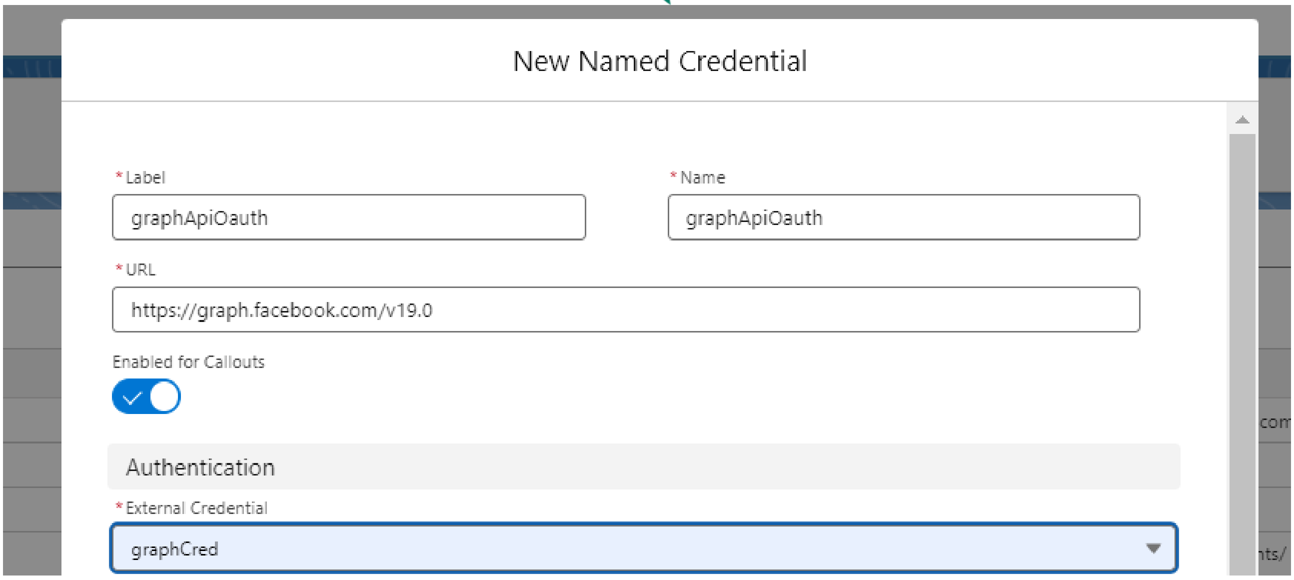
- In Managed Package Access enter ‘HexaConnect’ below Allowed Namespaces for Callouts.



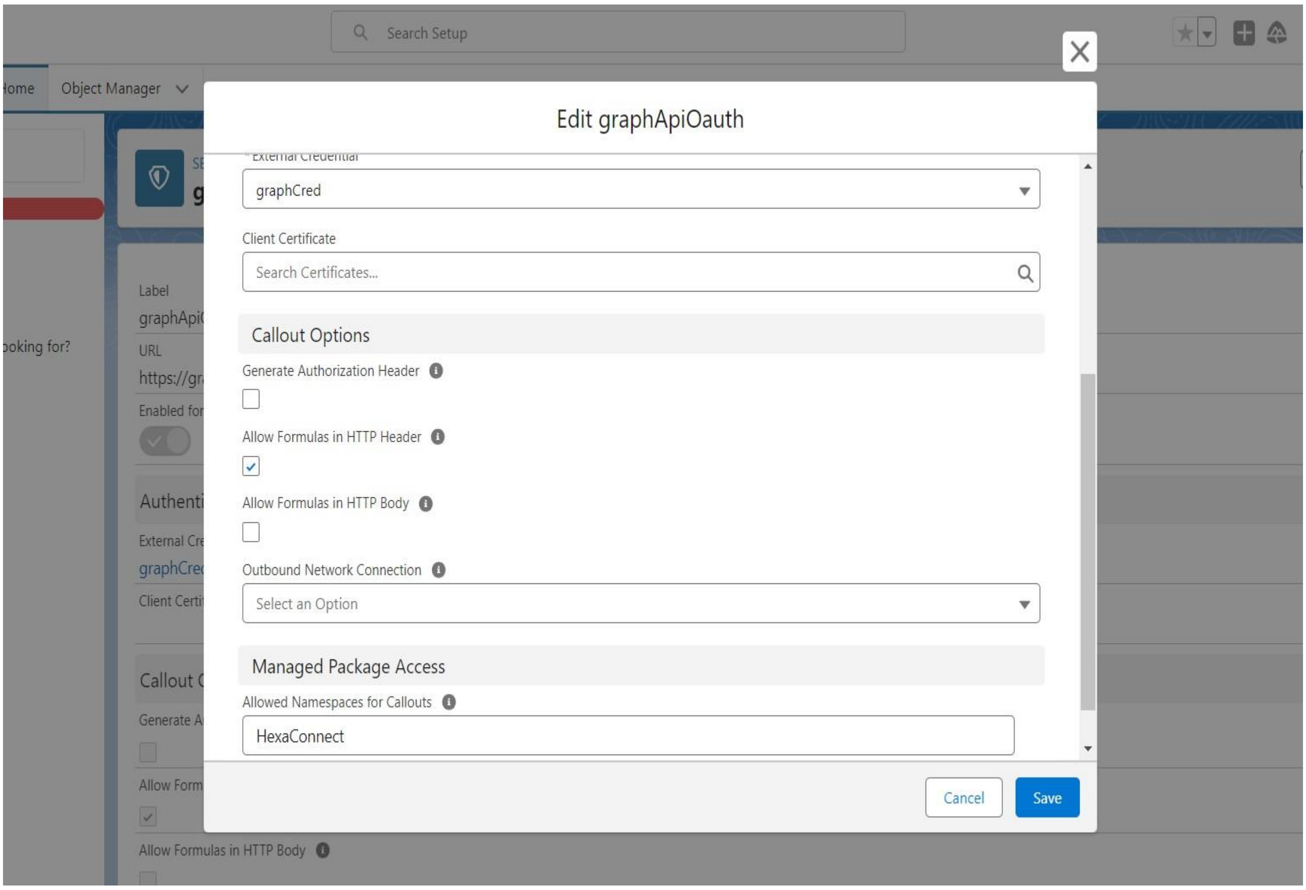
- Finally, click on ‘Save’.

2.3.3.3 ‘graphApiOauth’ Named Credential:

- Click on ‘New’ on the top right of the screen.
- In Label enter ‘graphApiOauth’ and in Name ‘graphApiOauth’
- In URL enter - https://graph.facebook.com/v19.0
- Set Enabled for Callouts to true.
- In External Credential add ‘graphCred’



- In Callout Options ‘check’ Allow Formulas in HTTP Header.
- In Managed Package Access enter ‘HexaConnect’ below Allowed Namespaces for Callouts.

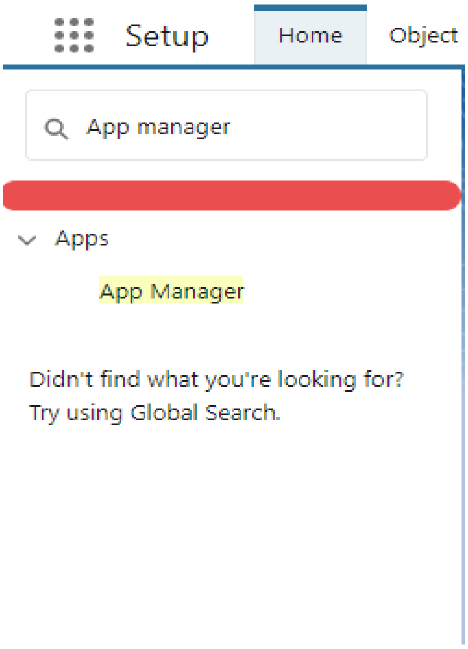


- Finally, click on ‘Save’.

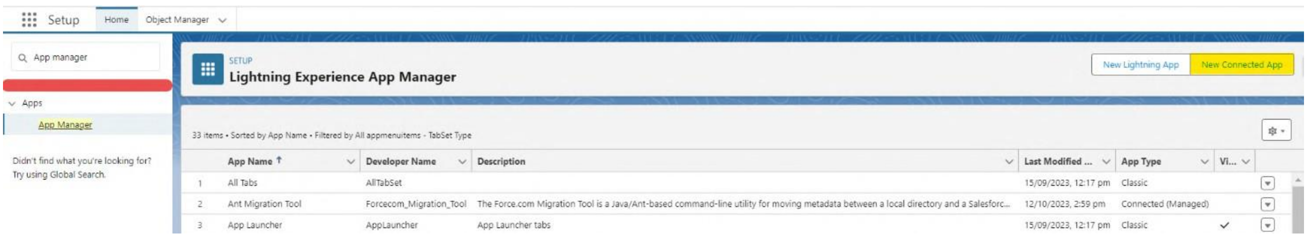
2.3.4 Connected App Setup:

2.3.4.1 Creating a Connected App:

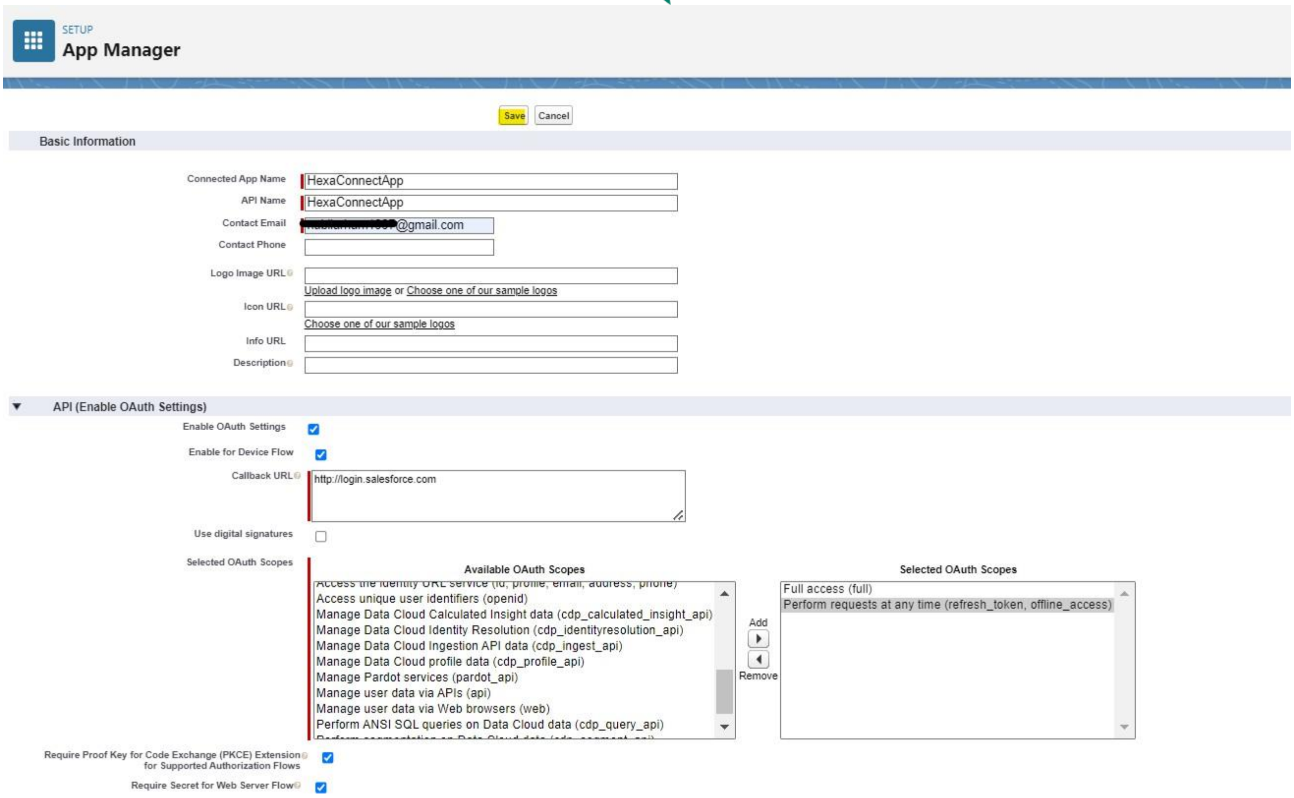
- Go to Setup page and in the quick find box type and click on 'App Manager'.



- On top right of the screen click on 'New Connected App'.

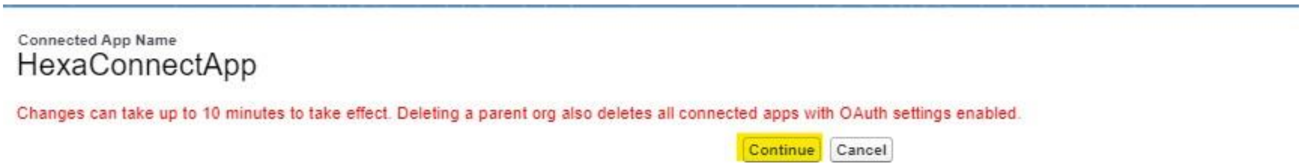


- Enter the Connected App Name as 'HexaConnectApp', the API name will be populated automatically
- Enter your Email in the Contact Email field.
- In the next section check the 'Enable OAuth Settings' & 'Enable for Device Flow' checkbox.
- Enter a random 'Callback URL' as http://login.salesforce.com
- Next provide 'Full access (full)' and 'Perform requests at any time (refresh_token , offline_access)' on 'Selected OAuth Scopes'.
- Uncheck the '**Require Secret for Refresh Token Flow**' and leave rest as it is.
- Click on Save.

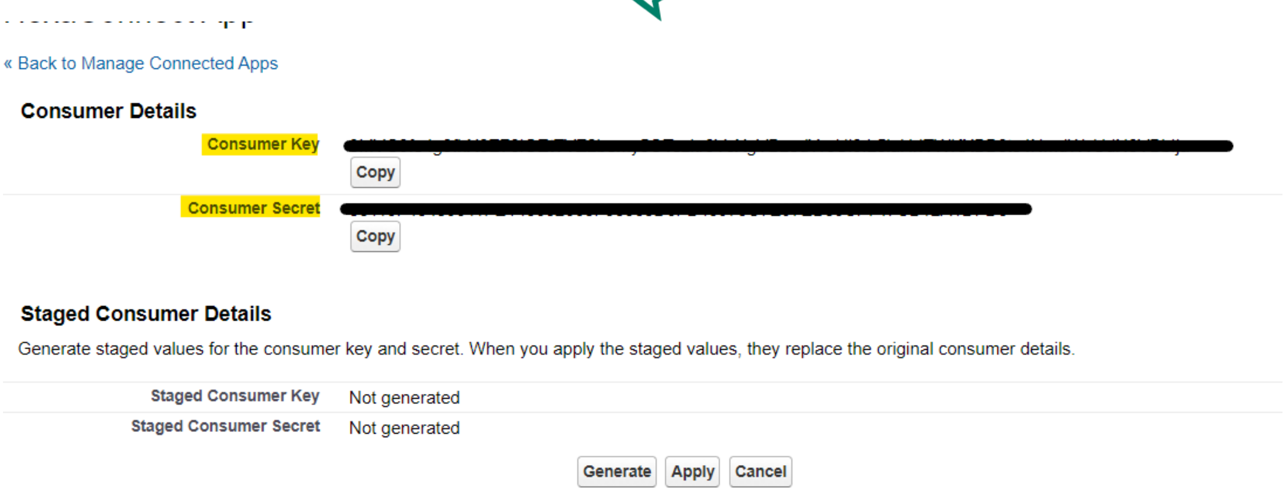


NOTE: It takes a few minutes for changes to take effect.

- Click on Continue.

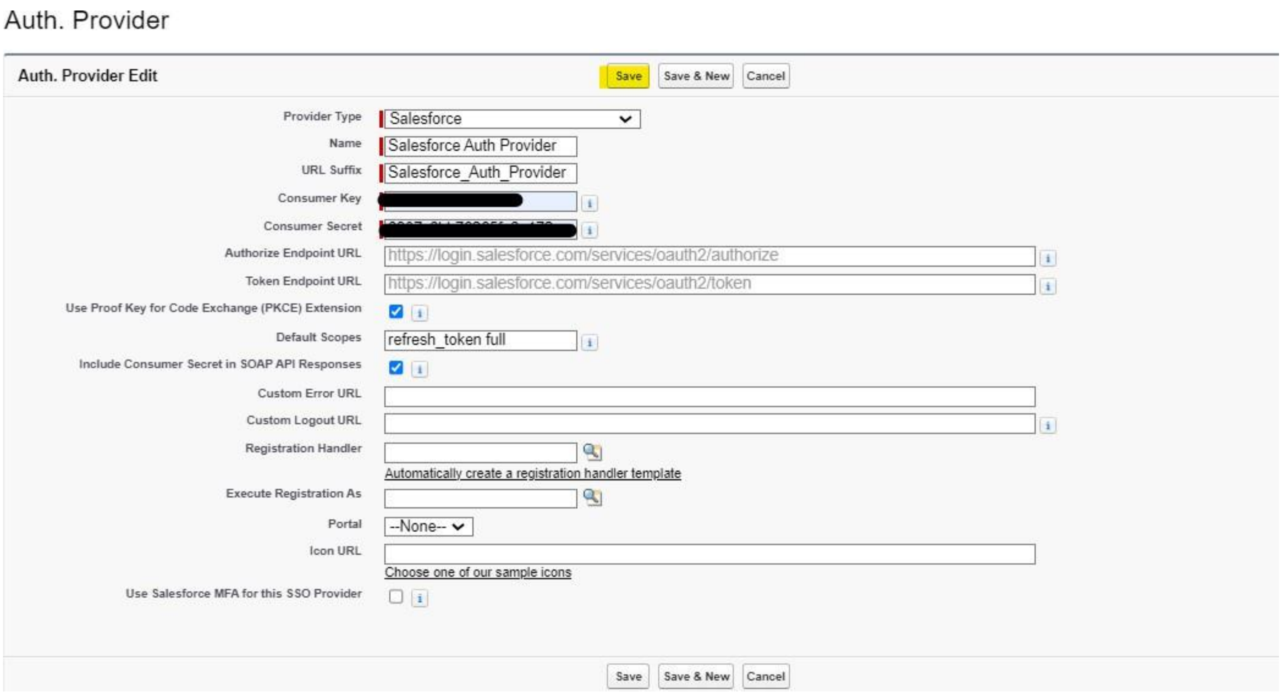


- Scroll down to 'API (Enable OAuth Settings)' section and click on 'Manage Consumer Details'.
- Enter the verification code sent on your respective mail ID.
- Simply copy and save your Consumer Key & Consumer Secret somewhere for further use.

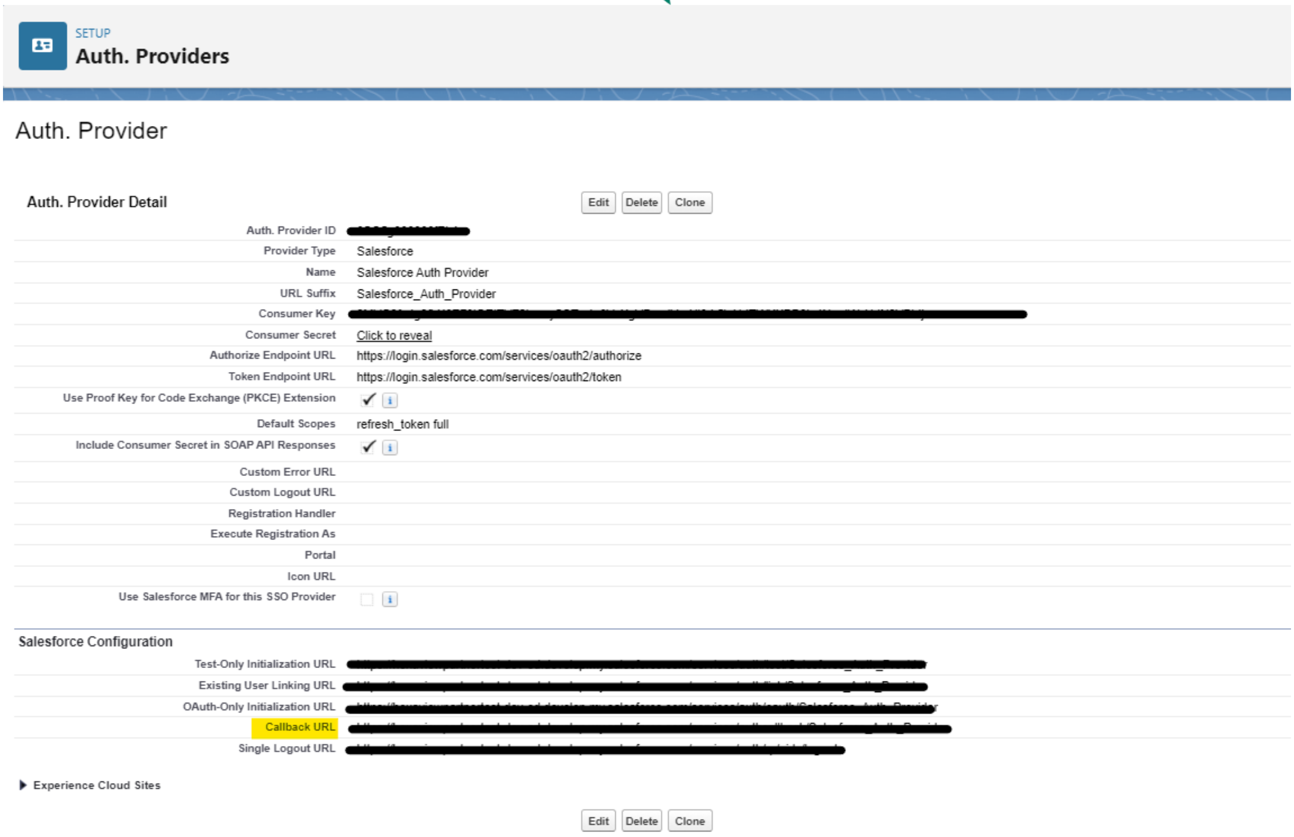


2.3.4.2 Auth. Provider Setup for Connected App:

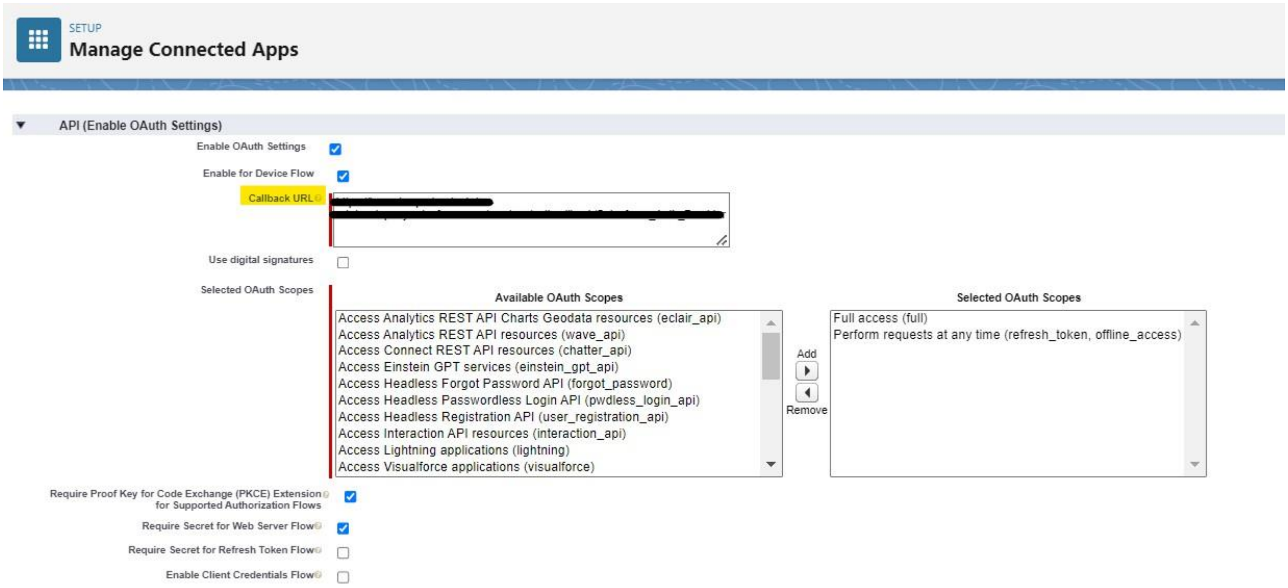
- Next go to setup page and type 'Auth.' and click on Auth. Providers.
- Click on New.
- Choose 'Salesforce' as Provider Type.
- Enter Name as 'Salesforce Auth Provider', the URL suffix will be populated automatically.
- Enter the Consumer Key and Consumer Secret that you copied.
- Enter 'refresh_token full' in Default Scopes.
- Click on Save.



- Once saved a 'Salesforce Configuration' section would be generated, copy the 'Callback URL' value.



- Go to the quick find box and enter app manager and click on 'App Manager'.
- Locate your newly created Connected App (HexaConnectApp) and click on Edit from the dropdown.
- Replace the existing 'Callback URL' from the one which you copied from 'Salesforce Configuration' section in Auth. Provider.

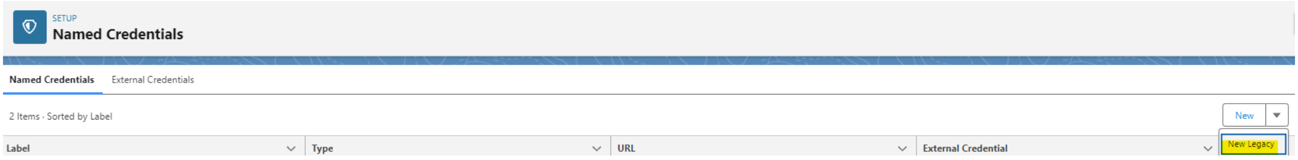


- Click on Save and then Continue.

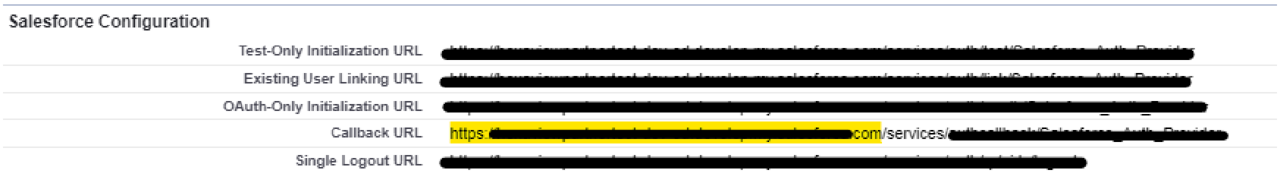
2.3.4.3 Named Credential for Connected App:

- Go to the quick find box and enter 'named credential' and click on 'Named Credential'.

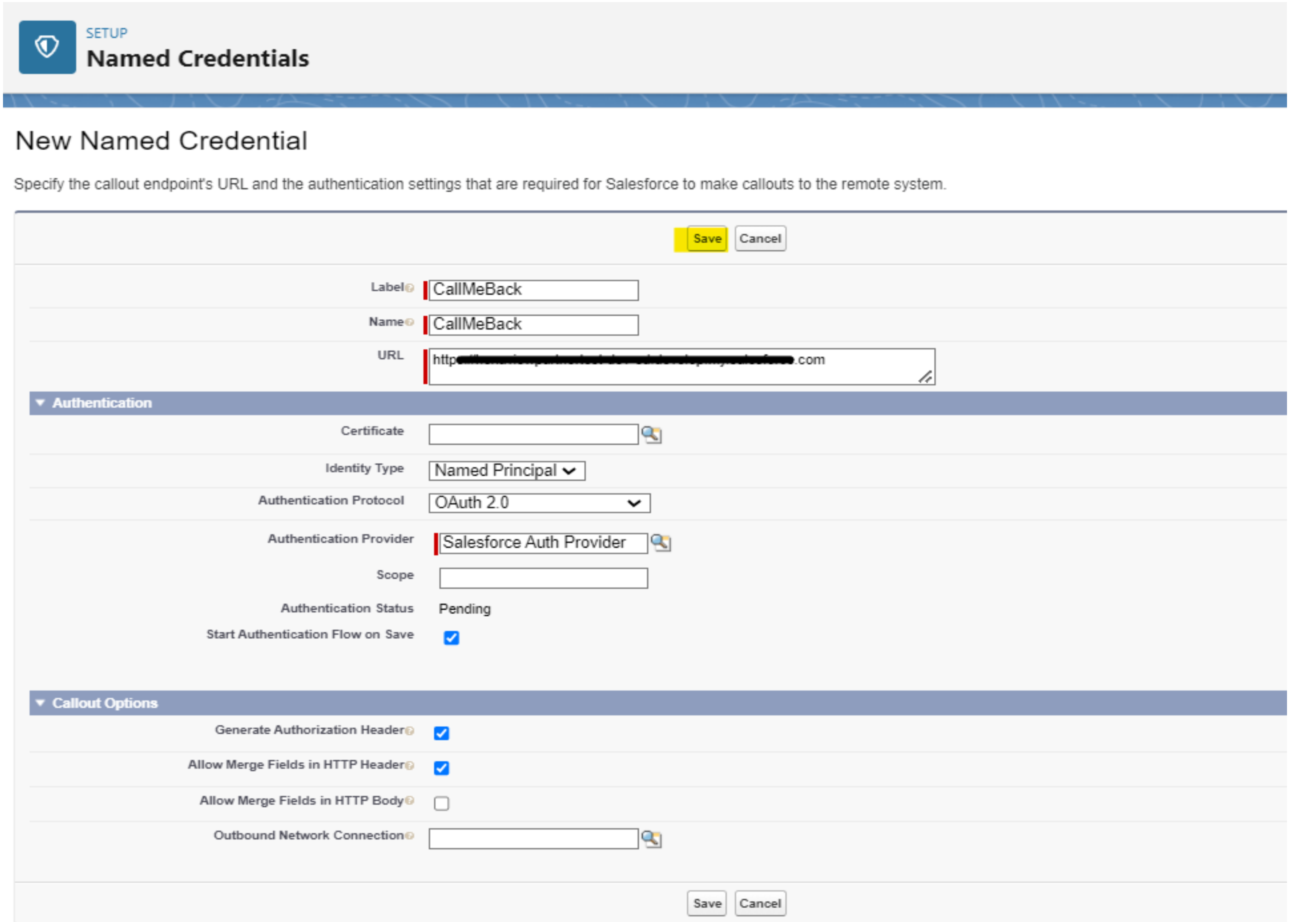
- On the top right click on the dropdown and select 'New Legacy'.



- Enter the Label as ‘CallMeBack’, Name will be populated automatically.
- For the 'URL' field copy the Callback URL generated during Auth. Provider before **/services** and paste it.

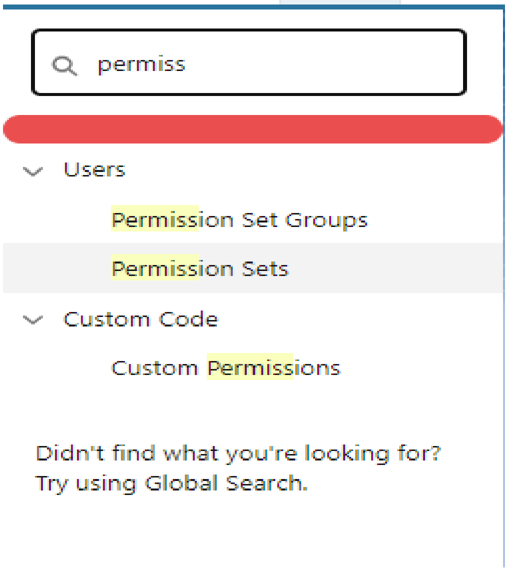


- Choose Identity type as 'Named Principal' and Authentication Protocol as 'OAuth 2.0'.
- Choose the Authentication Provider that you have created (Salesforce Auth Provider).
- Check the '**Allow Merge Fields in HTTP Header**' box.
- Click on Save.

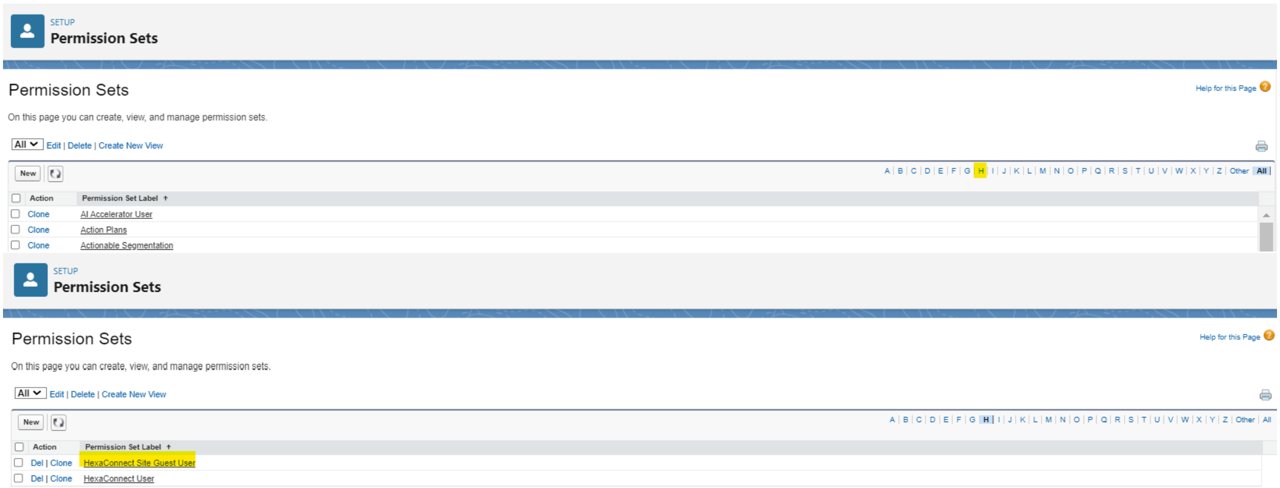


2.3.5 Permission Set Assignment:

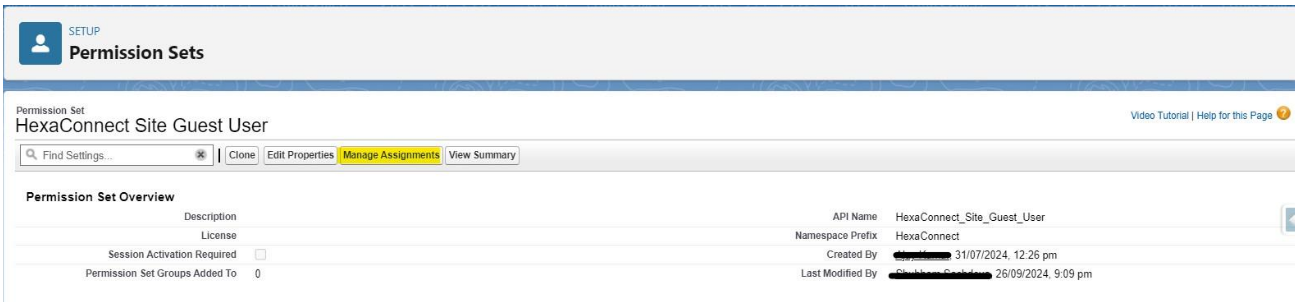
- In the quick find box type ‘permission’ and under Users click on ‘Permission Sets’.



- Navigate and click on 'HexaConnect Site Guest User' by clicking on the 'H' alphabet on the top right of your page.

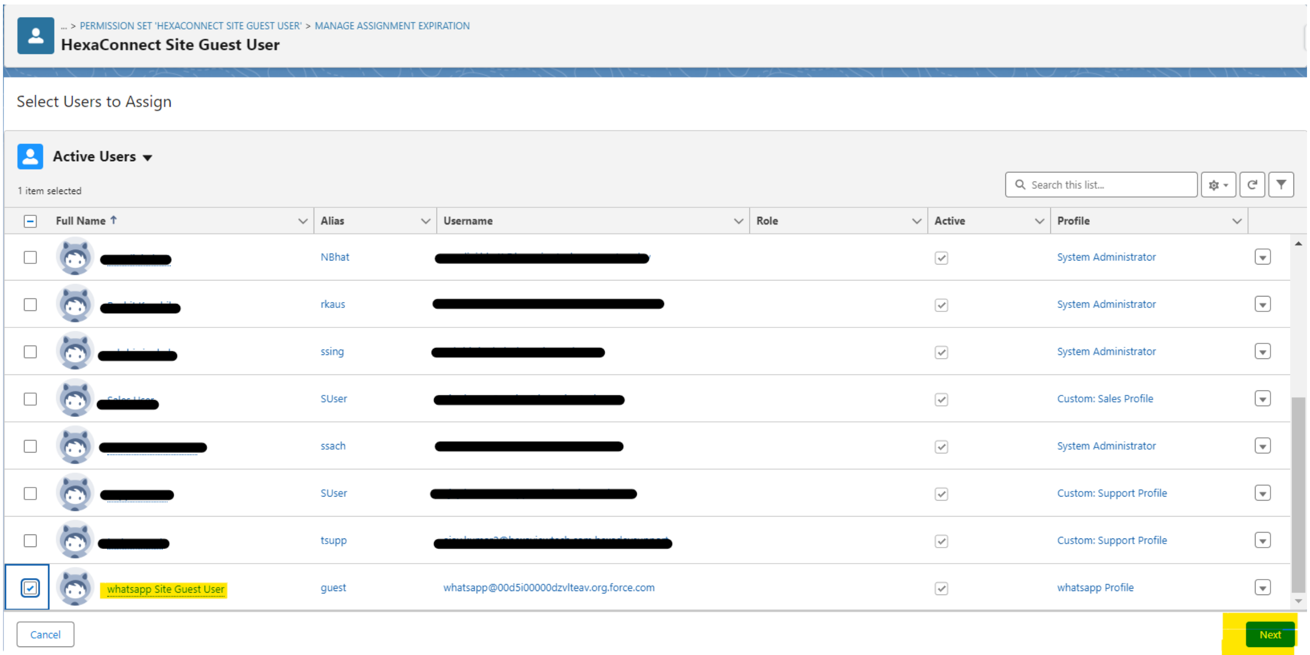


- Click on Manage Assignments



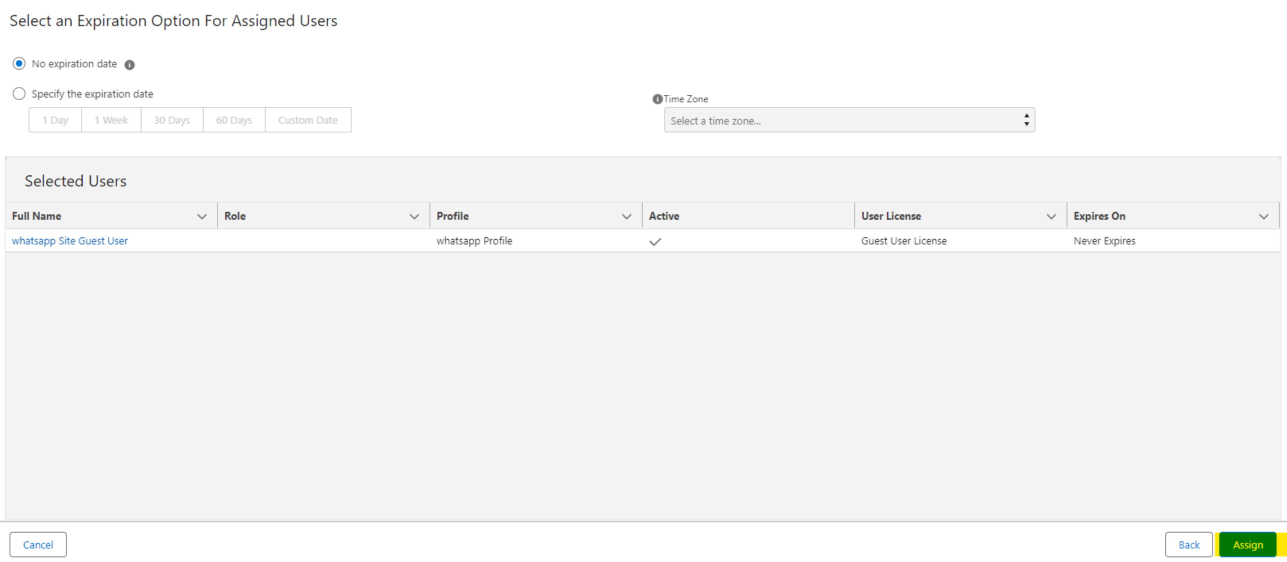
- Click on 'Add Assignment' at the top right of your page

- Find 'HexaConnectTest Site Guest User' and select the checkbox and click on Next.



- Keep Expiration option as it is. (i.e. No expiration date)

- Finally click on 'Assign' at the bottom right.

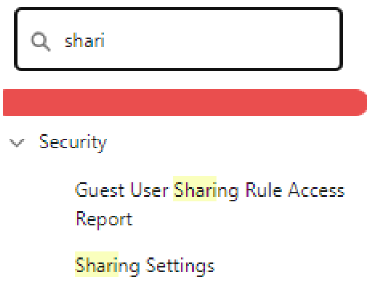


- Now go to Profiles from the quick find box and choose System Administrator.
- Scroll down and choose 'External Credential Principal Access'
- Click on Edit and add the 'graphCred' credential.
- Click on Save to finalize the changes.

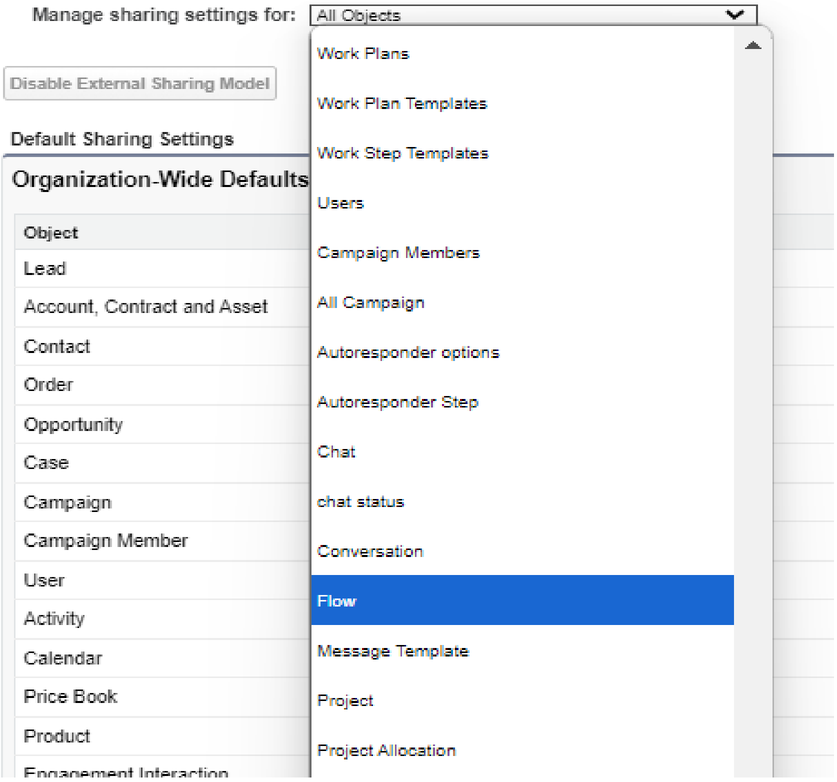
NOTE: Another permission set, called "**HexaConnect User**" can be assigned to any user in your organization. Be sure to grant 'External Credential Principal Access'(graphCred) to the user's profile in the same way as you did for the System Administrator profile above. This permission set is designed to manage conversation/template media visibility according to the profiles of different users.

2.3.6 Sharing rules assignment:

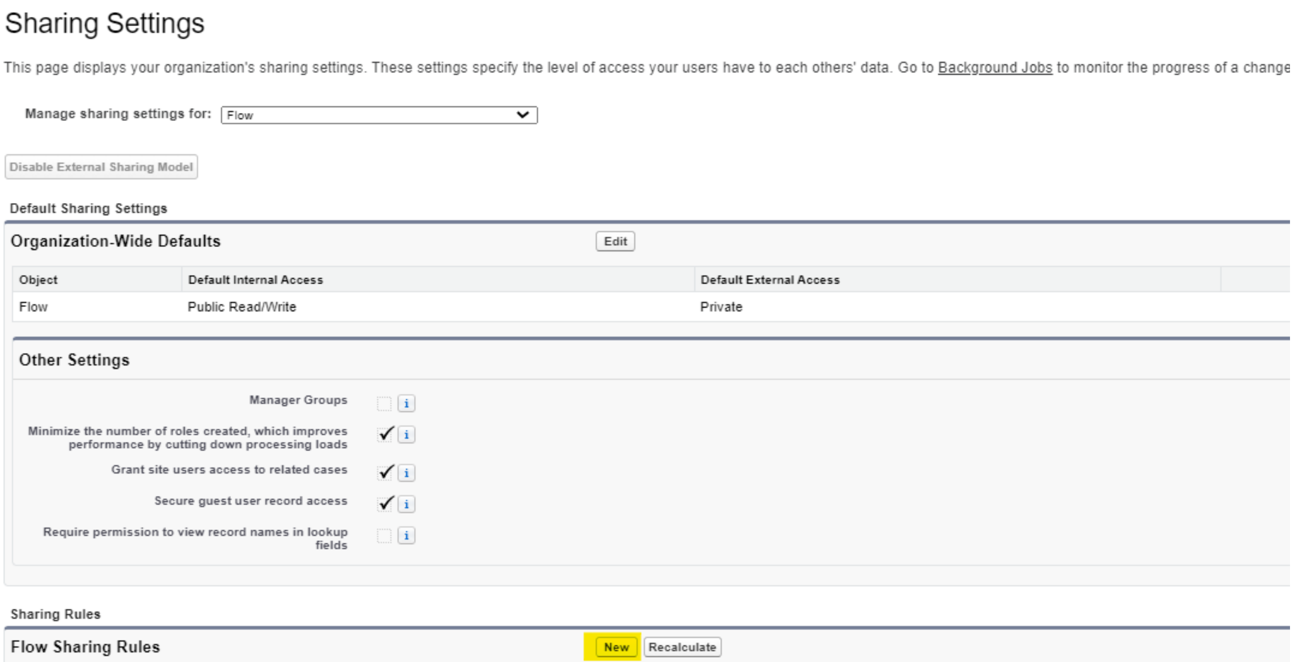
- In the quick find box type 'Sharing' and click on Sharing Settings.



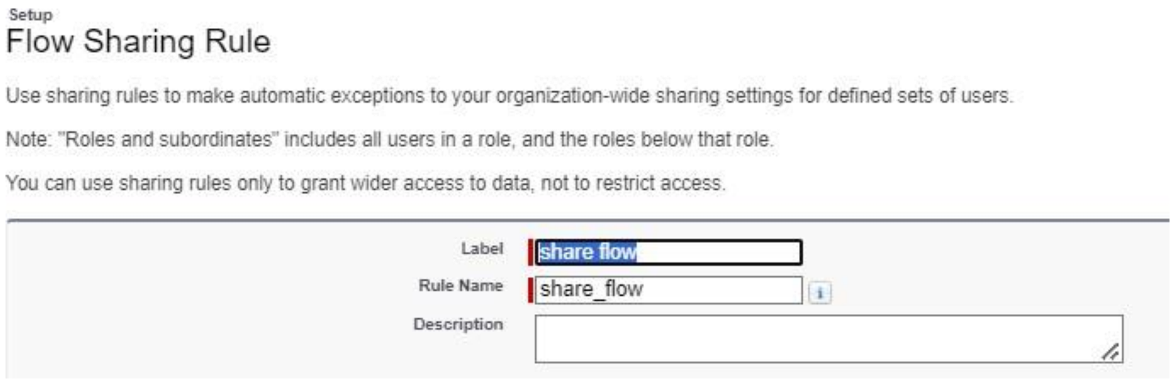
- Click on the dropdown and select 'Flow'.



- Under Sharing Rules Click on ‘New’.

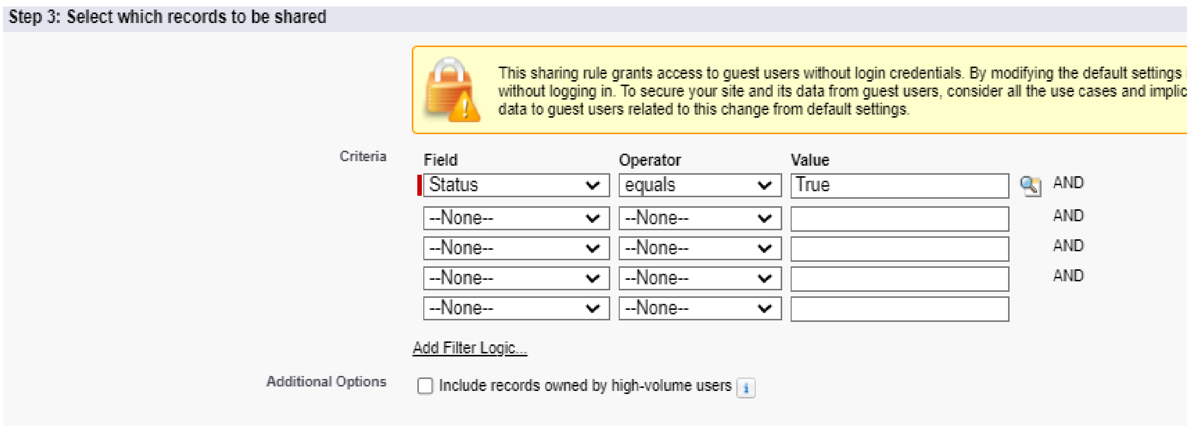


- Enter ‘Label’ as ‘share flow’, ’Rule Name’ will be populated automatically.



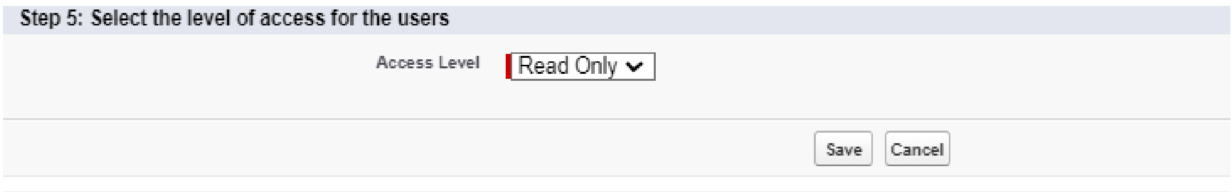
- Next, select your type as 'Guest user access, based on criteria'.

- Under step 3, select 'Status equals True'



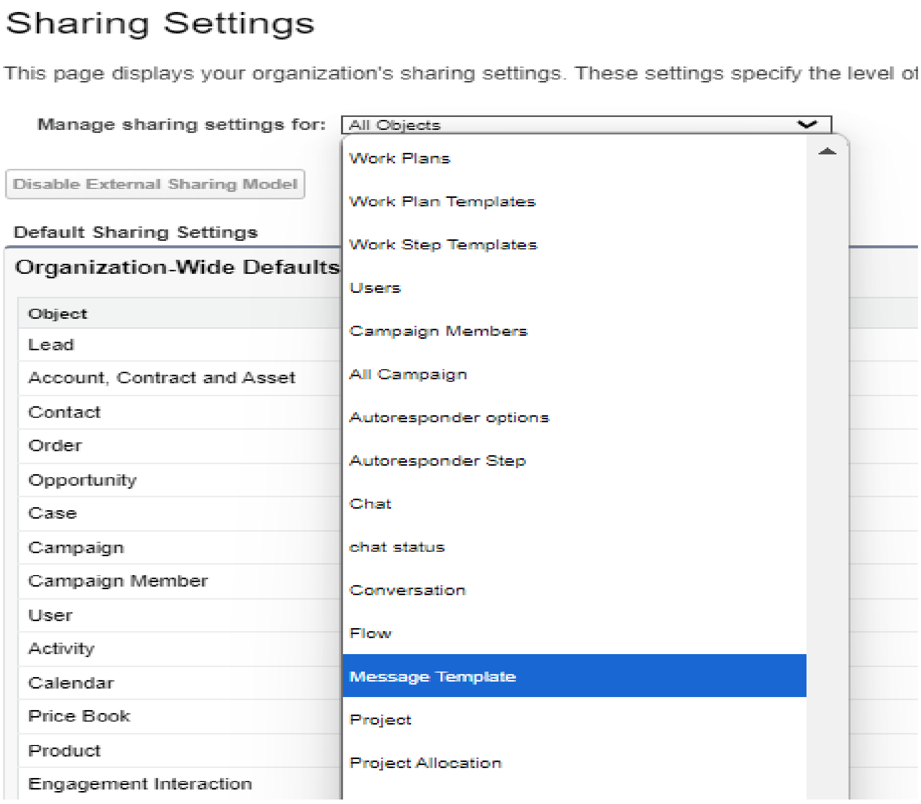
- Next on step 4, select 'HexaConnectTest Site Guest User'

- Lastly select 'Access Level' as 'Read only' and click on 'Save'.

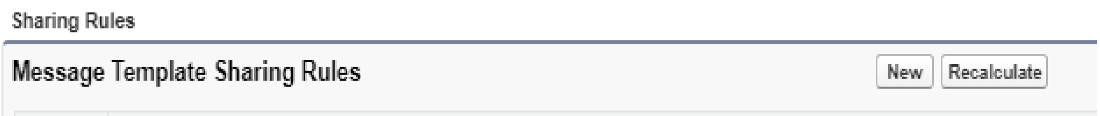


Return to the 'Sharing Settings' homepage.

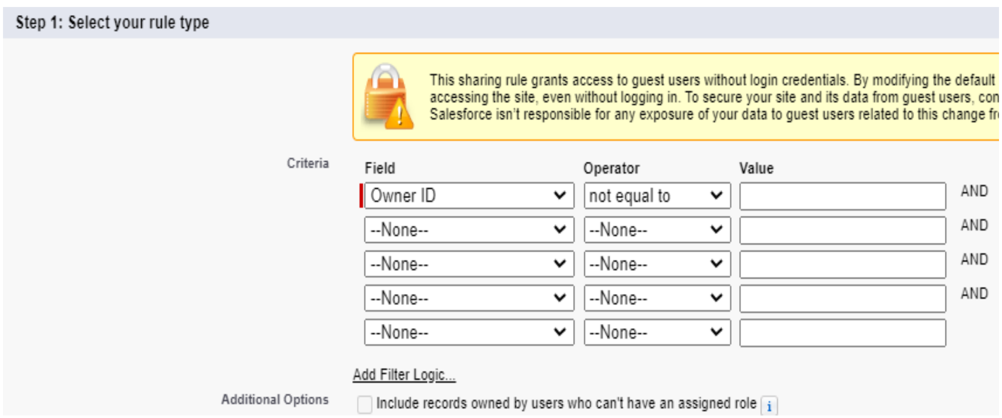
- Select 'Message Template' from the dropdown



- Under Sharing Rules Click on ‘New’.



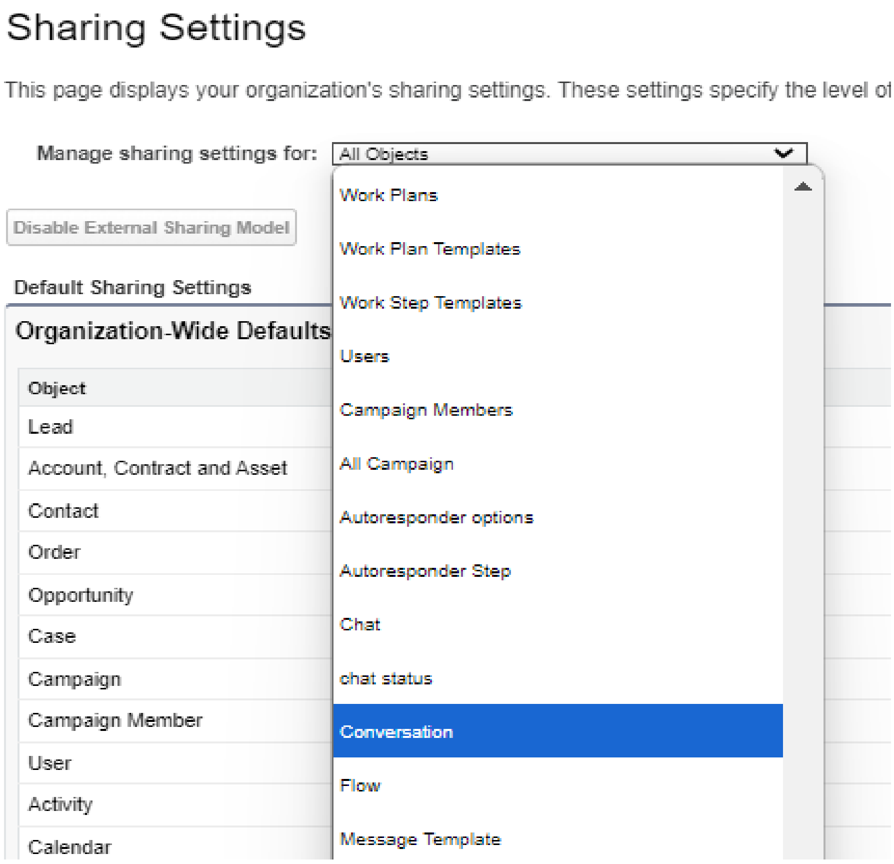
- Enter ‘Label’ as ‘share temp’, ‘Rule Name’ will be populated automatically.
- Next, select your type as ‘Guest user access, based on criteria’.
- Under step 3, select ‘Owner ID not equal to blank’.



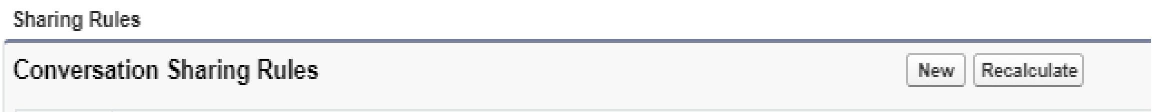
- Next on step 4, select ‘HexaConnectTest Site Guest User’
- Lastly select ‘Access Level’ as ‘Read only’ and click on ‘Save’.

Return to the ‘Sharing Settings’ homepage.

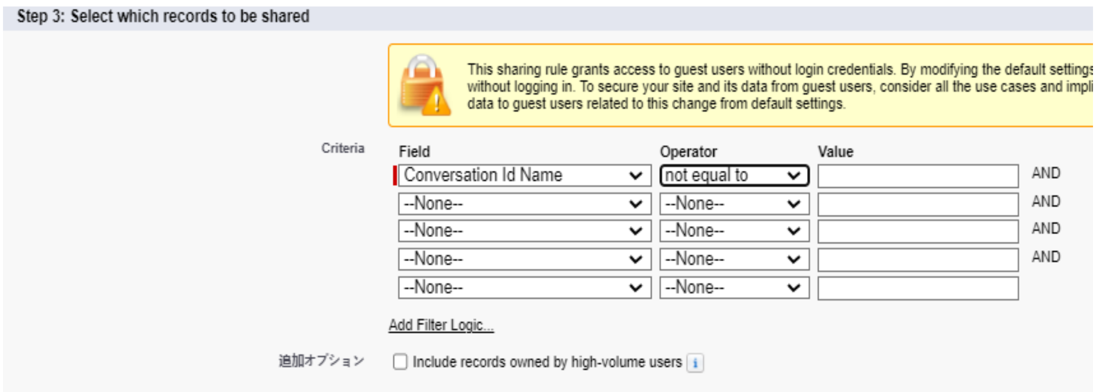
- Select ‘Conversation’ from the dropdown.



- Under Sharing Rules Click on 'New'.



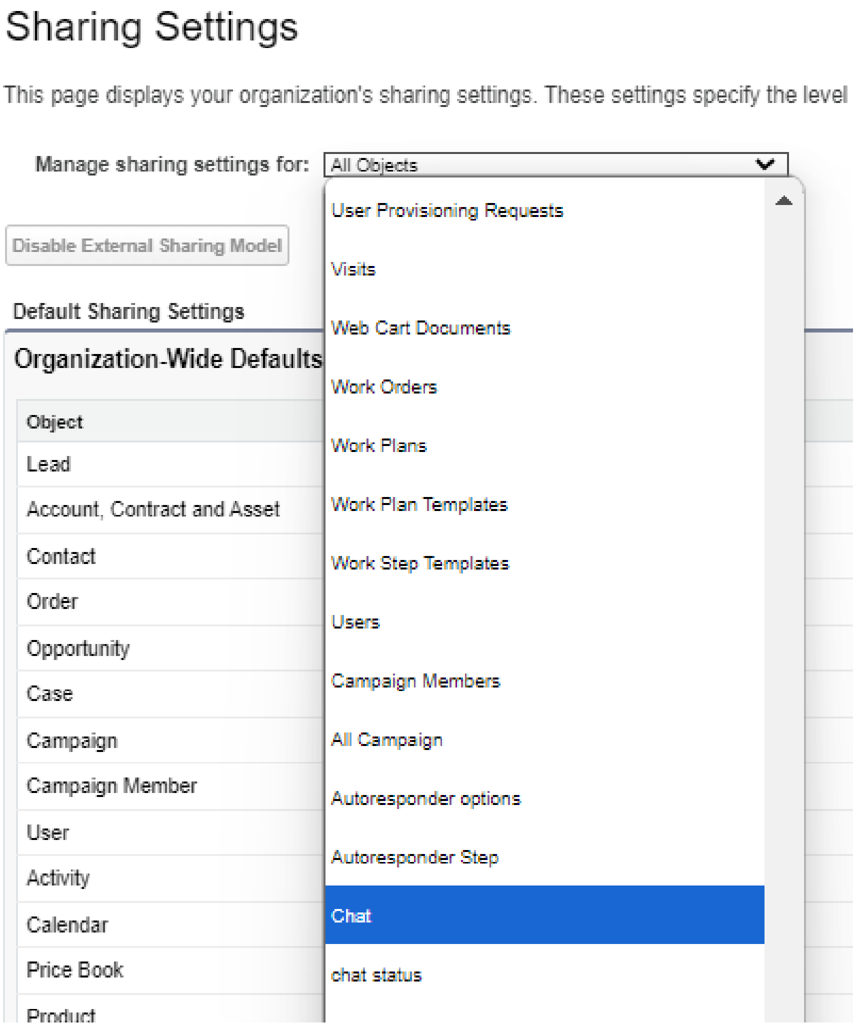
- Enter label as 'conv share', 'Rule Name' will be populated automatically.
- Next, select your type as 'Guest user access, based on criteria'.
- Under step 3, select 'Conversation Id Name not equal to blank'.



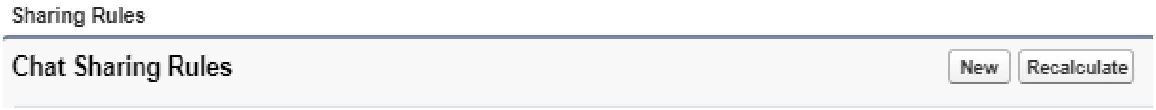
- Next on step 4, select 'HexaConnectTest Site Guest User'.
- Lastly select 'Access Level' as 'Read only' and click on 'Save'.

Return to the 'Sharing Settings' homepage.

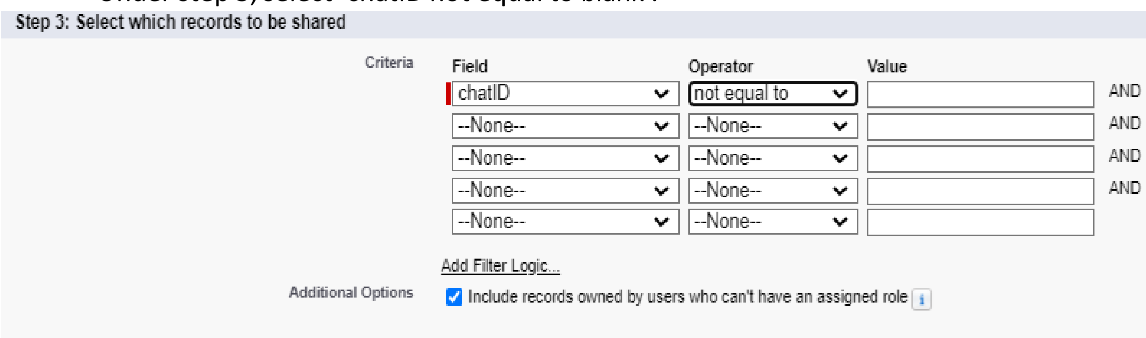
- Select ‘Chat’ from the dropdown.



- Under Sharing Rules Click on ‘New’.



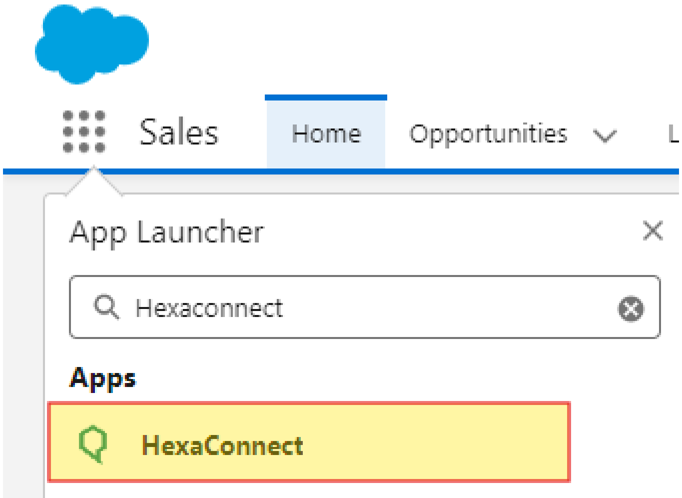
- Enter label as ‘Share Chats’, ‘Rule Name’ will be populated automatically.
- Next, select your type as ‘Guest user access, based on criteria’.
- Under step 3, select ‘chatID not equal to blank’.



- Next on step 4, select ‘HexaConnectTest Site Guest User’
- Lastly select ‘Access Level’ as ‘Read only’ and click on ‘Save’.

2.3.7 App Setup:

- From the App launcher search for HexaConnect and open it.

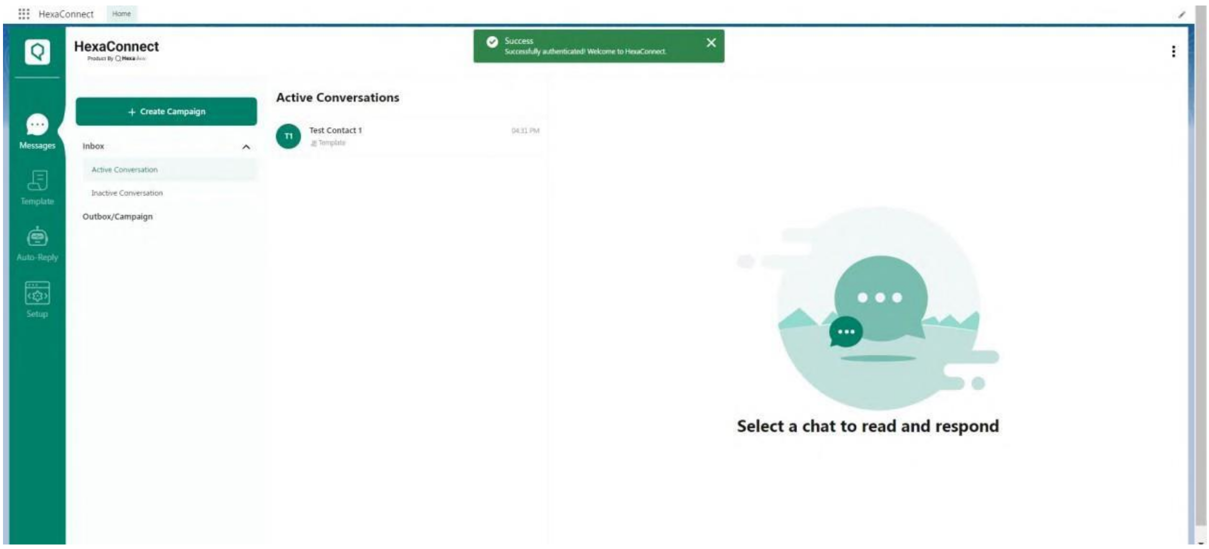


- The user will be redirected to the setup page and asked to enter the following information:
  - Business Account Information
  - App ID
  - App Secret
  - Salesforce Public Site URL: Create a Site.com site in Salesforce and provide access to the
  - Phone Number ID
  - WhatsApp Business Account
- All the above-mentioned information can be found on Meta or Salesforce following the steps mentioned in Section 2.2.
- After entering and verifying the details, click on ‘Submit’
- Upon successful authentication, the user will be redirected to the homepage of HexaConnect

3. Navigation across the application

3.1 Main screen - Home screen

After successfully submitting the required information, the user will be automatically directed to the homepage. On the homepage, the user will have access to the following features:



1. Open items are provided in the menu bar.
2. View profile information through the profile page. (On the top right corner)

3.2 Menu options

The menu bar consists of the following options:

3.2.1 Messaging: The messaging tab enables users to read and respond to direct messages, create new campaigns, and view all campaign history.
3.2.2 Templates: The template enables users to view all templates created on the linked WhatsApp account and configure templates that contain variables or media.
3.2.3 Auto-Reply: Users can create and customize the automatic responses and pre-defined actions through the Auto-Reply tab.
3.2.4 Setup: Through the setup tab, the users can re-authenticate themselves.
3.2.5 Profile Page (On the top-right corner): The profile page displays and allows updating information related to the linked WhatsApp profile.

4. Features of HexaConnect

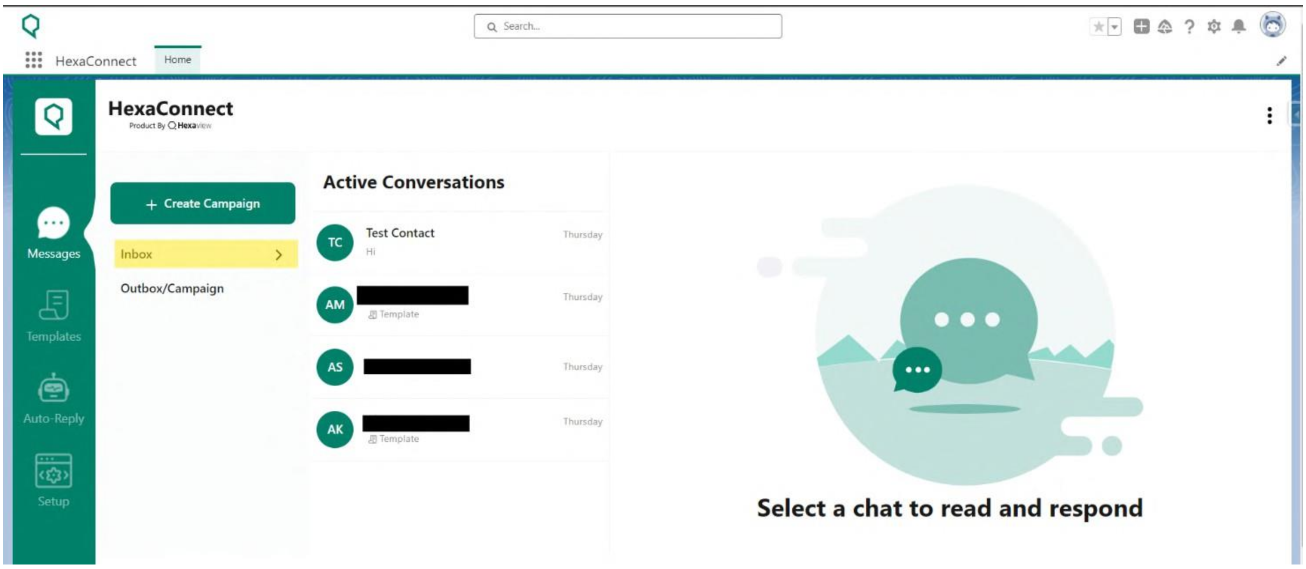
4.1 Direct Messaging

4.1.1 Direct Messaging using Messaging tab: Users can send or receive direct messages from the linked WhatsApp account directly on HexaConnect. According to WhatsApp policy, when a customer messages a business on its WhatsApp API number, it initiates a 24-hour session window. During this session, businesses can exchange unlimited messages with their customers. However, once the 24-hour period is over, WhatsApp closes the conversation. In HexaConnect, we have defined these periods as follows:

- **Active conversations**: During the 24-hour session, businesses can exchange unlimited messages without any additional cost, as per WhatsApp's messaging policy. Businesses can send messages using pre-approved templates or custom messages if it is within 24 hours of the last user message.
- **Inactive conversations:** After the 24-hour session closes, the business can only resume or start a new discussion by sending pre-approved templates.

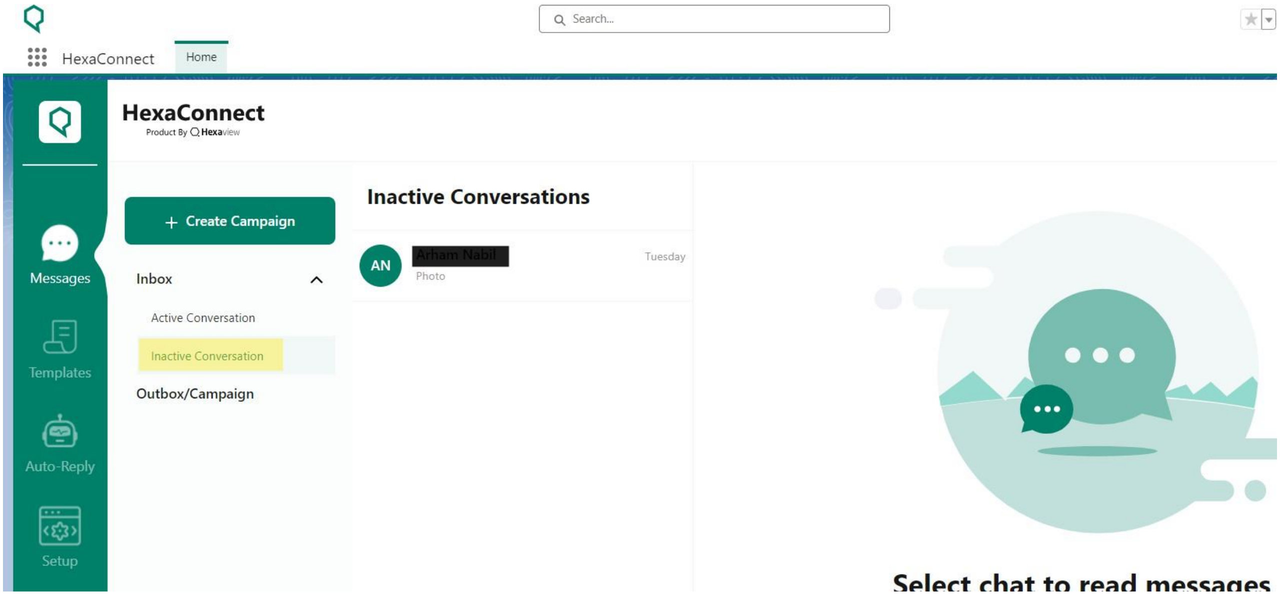
Note: This doesn't apply to business hours. The 24-hour rule is exactly 24 hours from the time a user reaches out via WhatsApp.

Steps for messaging (For inactive conversations):

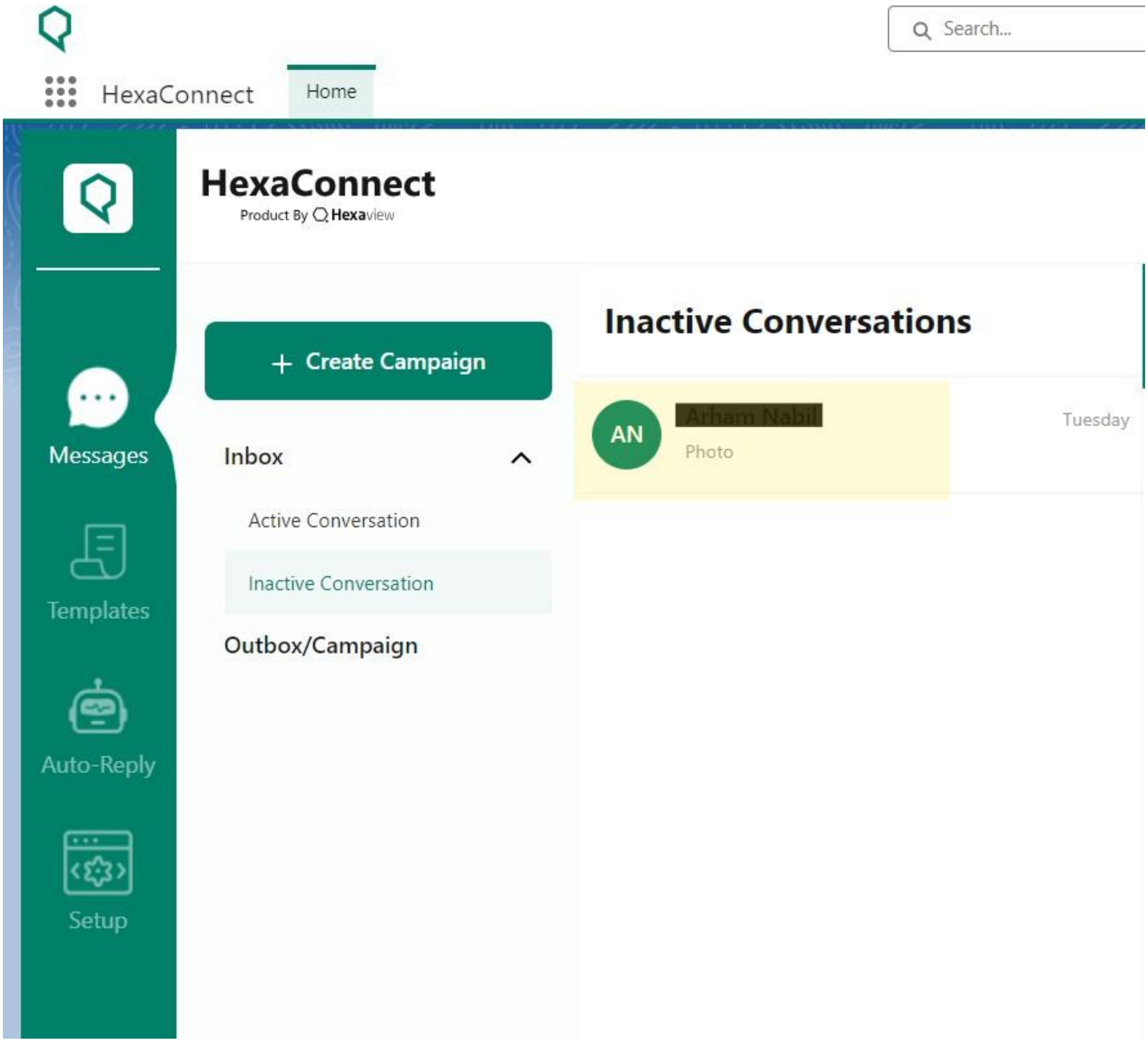


Step 1: Click on Messages from the Menu bar. The messaging tab will open and give two options: Inbox and Outbox/Campaigns.

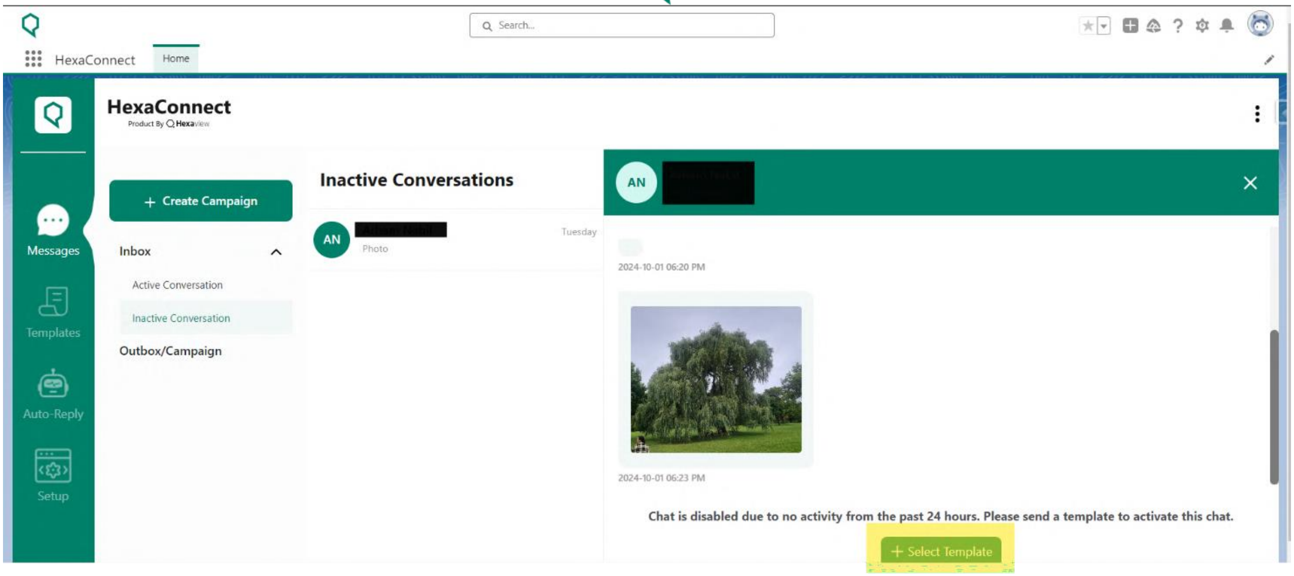
Step 2: Click on Inactive Conversations



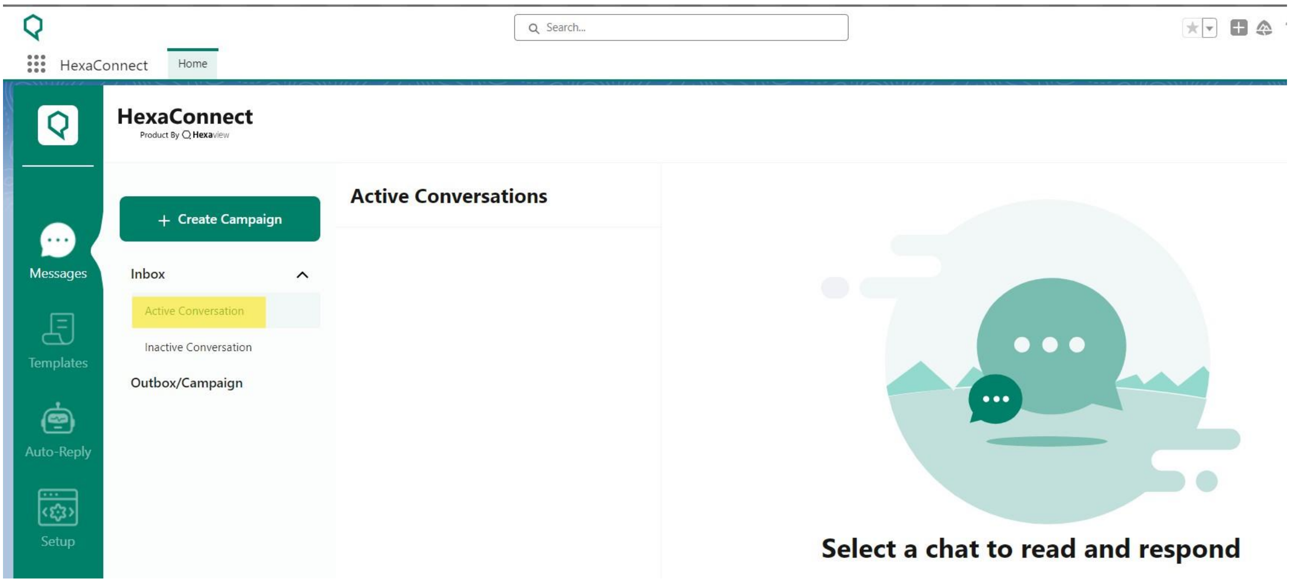
Step 3: Select and open the conversation you want to reactivate.



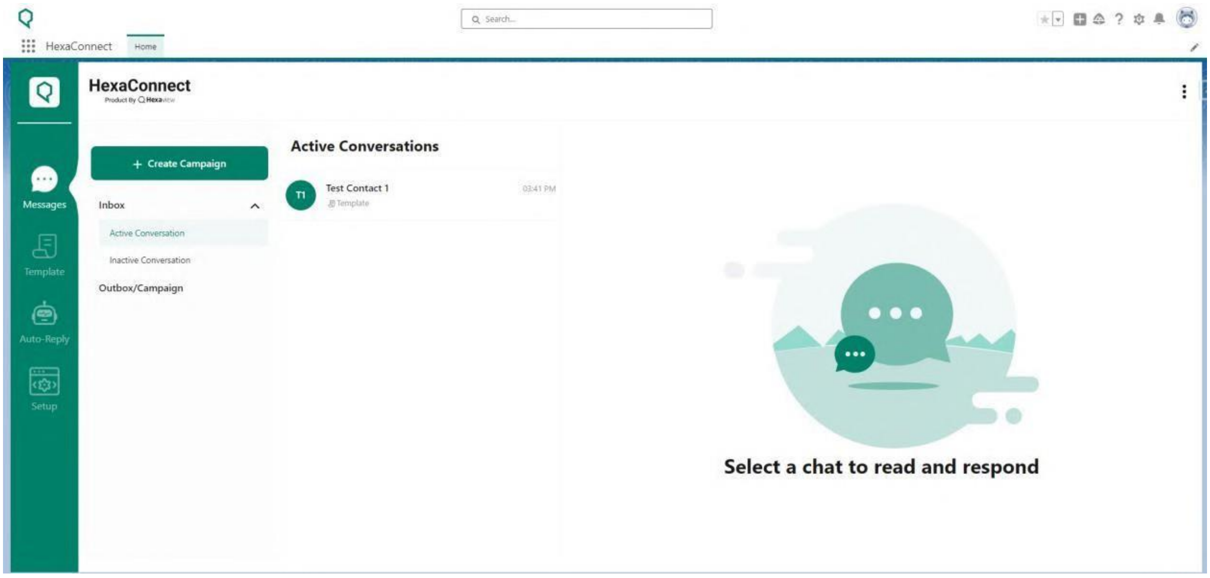
Step 4: Select the pre-approved template you want to send to the record and click send.


Search...
HexaConnect
Home
HexaConnect
Product By Hexaview
Messages
Templates
Auto-Reply
Setup
+ Create Campaign
Inbox
Active Conversation
Inactive Conversation
Outbox/Campaign
Inactive Conversations
AN
Tuesday
Photo
AN
2024-10-01 06:20 PM
2024-10-01 06:23 PM
Chat is disabled due to no activity from the past 24 hours. Please send a template to activate this chat.
+ Select Template

The selected template will be sent, and the conversation will become active.

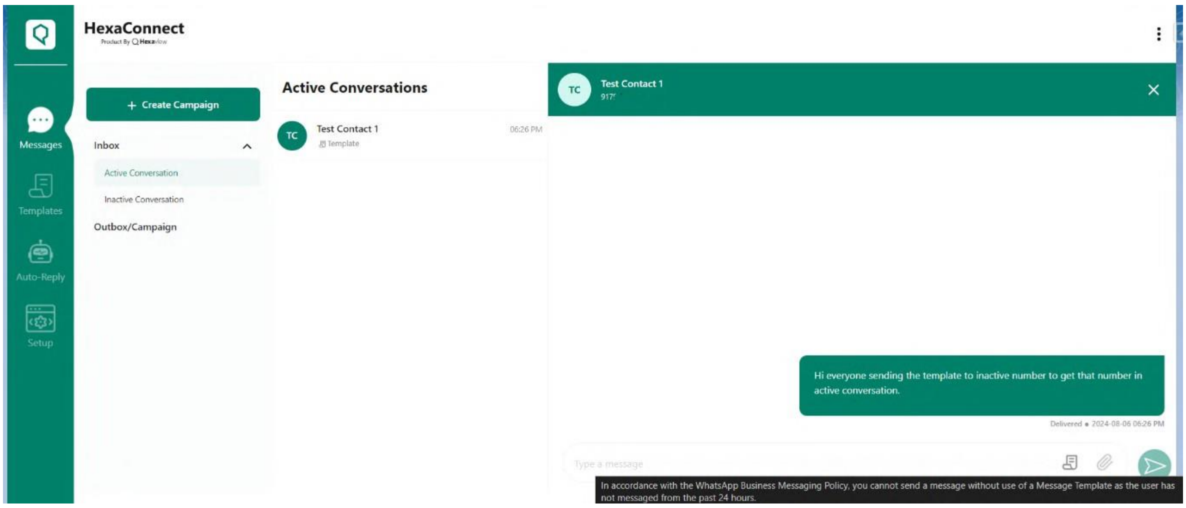


Step 5: The conversation will move to HexaConnect's conversation window. You can either continue the conversation using the template or wait for the user's response to send messages without using the template.



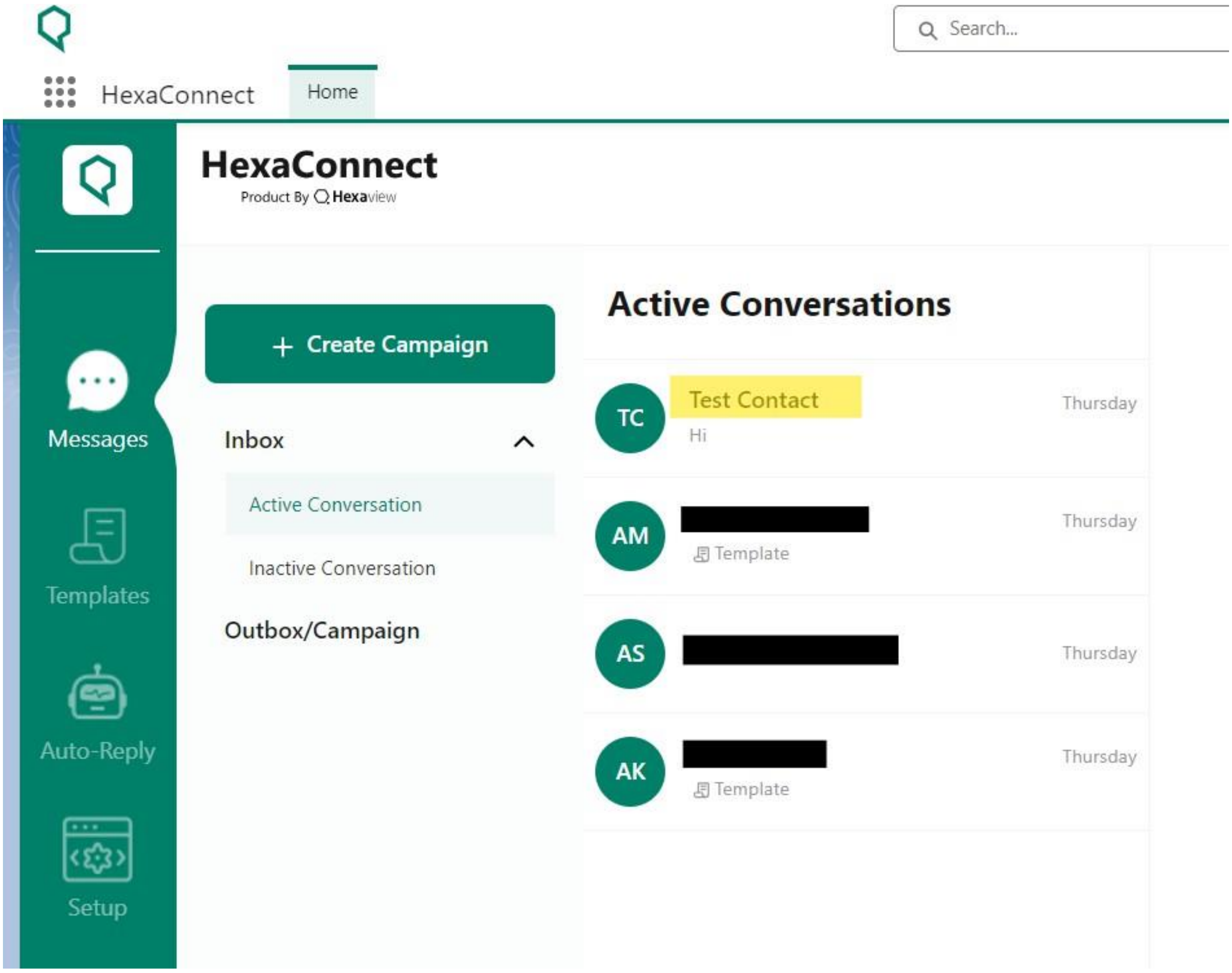
Note: For custom messages, the maximum character limit is 4096.

Note: After sending template(s) to a user, you must wait for them to reply before sending a custom message. The message box will become active and ready to use once a reply is received from the user and will remain active for the next 24 hours. However, you can continue sending templates regardless of the user's response.

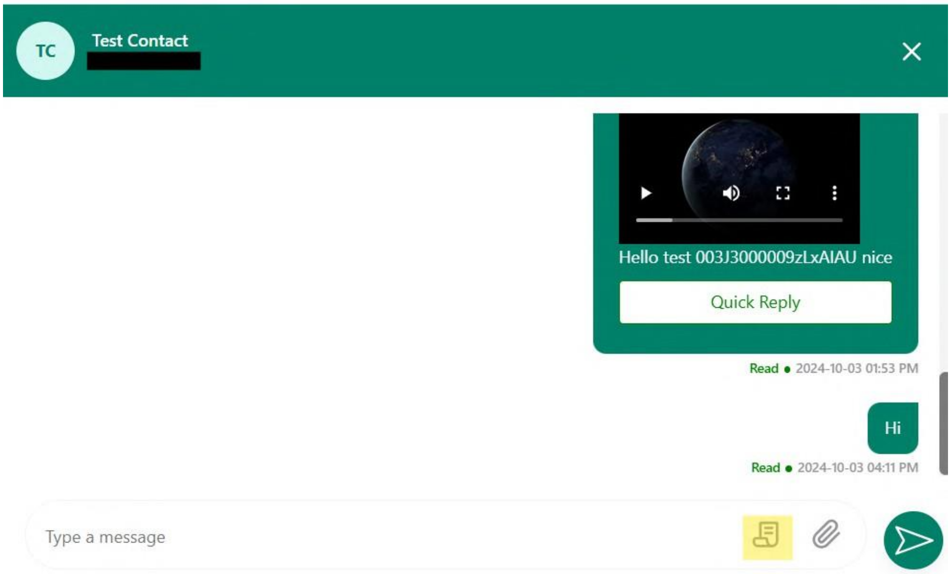


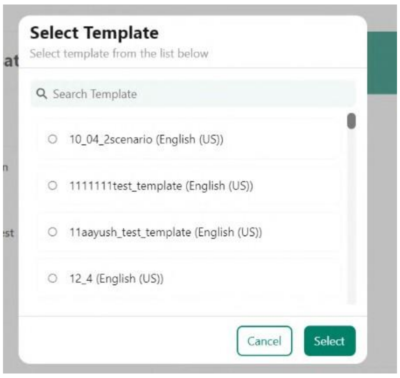
Steps for messaging (For active conversations):

Step 1: Go to the messaging tab.
Step 2: Select and open the conversation to which you want to send a message.



Step 3: You can either type a custom message or select a template you want to share.





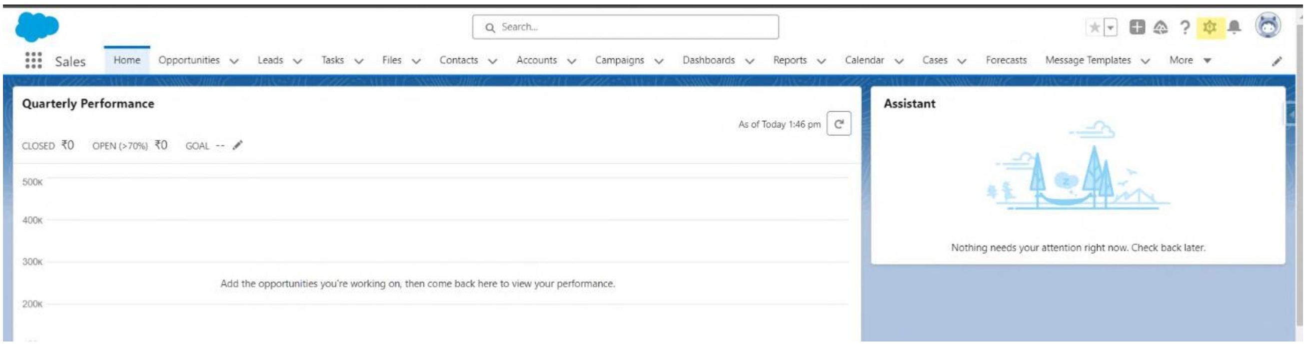
Step 4: Hit Enter or click Send to send your message.

4.2 Direct Messaging using Utility Chat feature

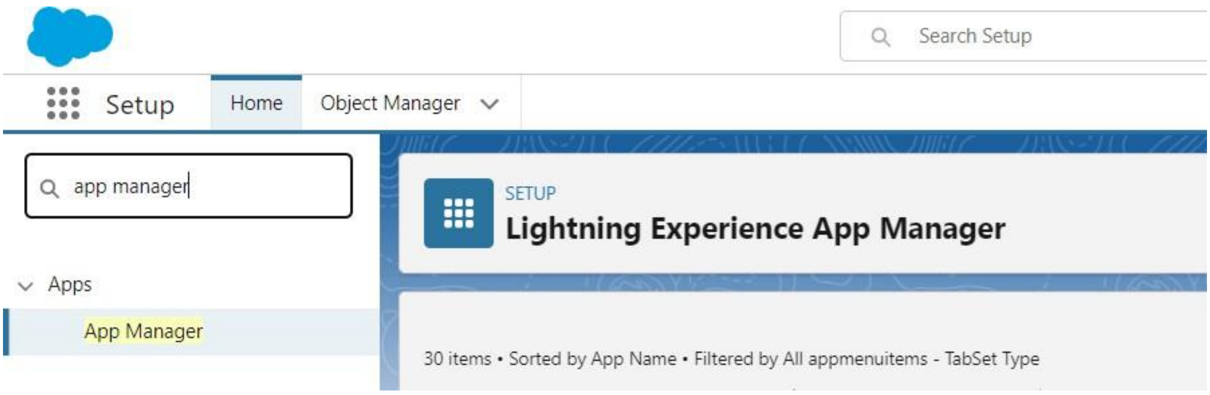
When using the Sales App, users have the option to initiate conversations with leads, contacts, cases, or opportunities by accessing the respective record pages and clicking on the utility chat located at the bottom left. By doing so, a floating chat window will appear, enabling the user tosend WhatsApp messages or templates directly from the record page.

Steps to enable Utility Chat for your Org:

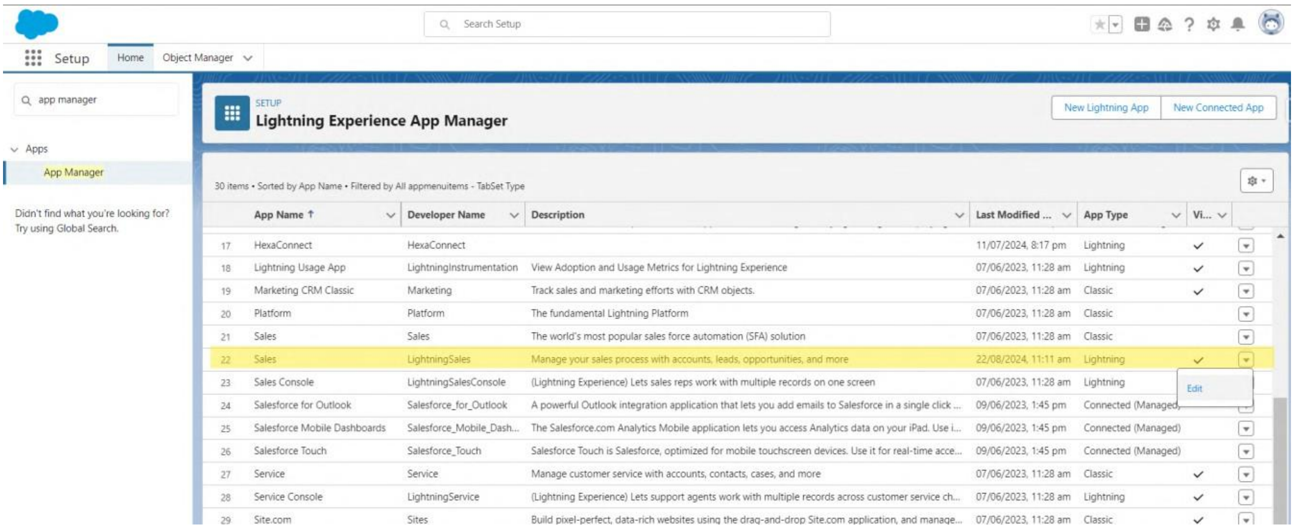
1. Open "Setup" by clicking on the Salesforce "Gear icon" & then on "Setup".



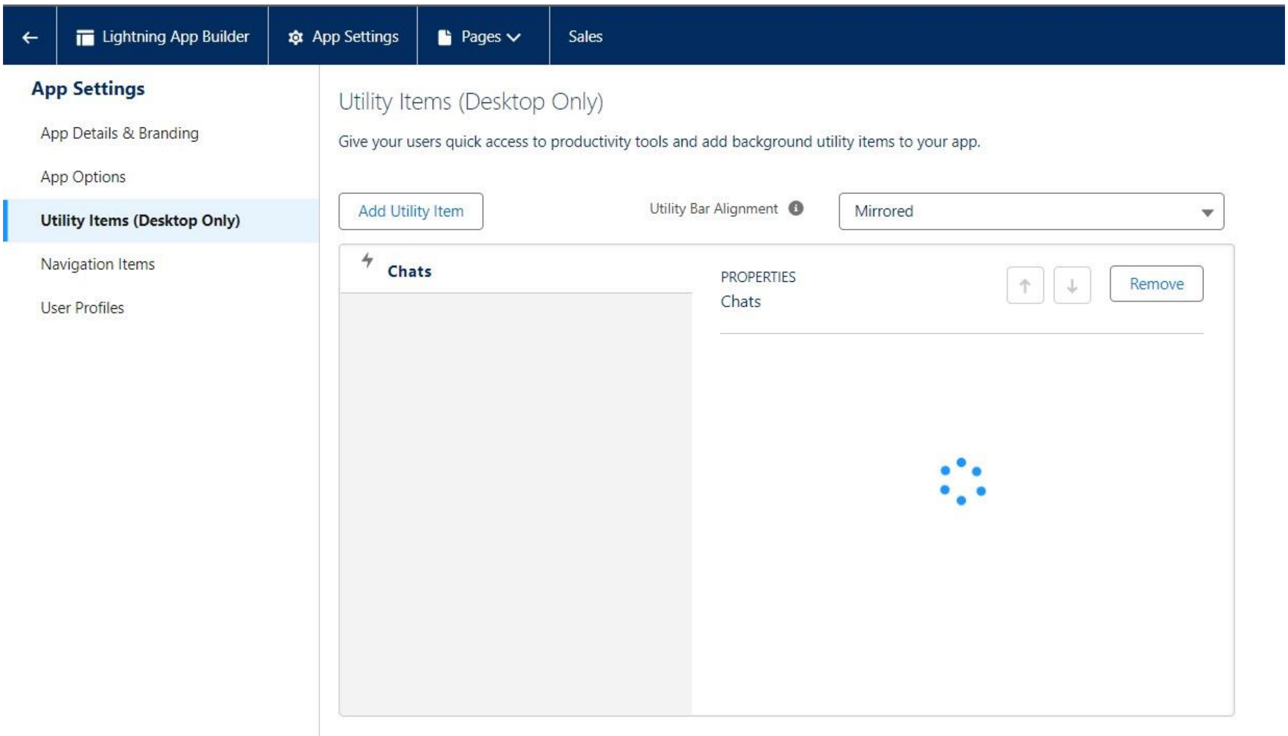
2. Search "App Manager" in the "Quick Find" box & click on it.



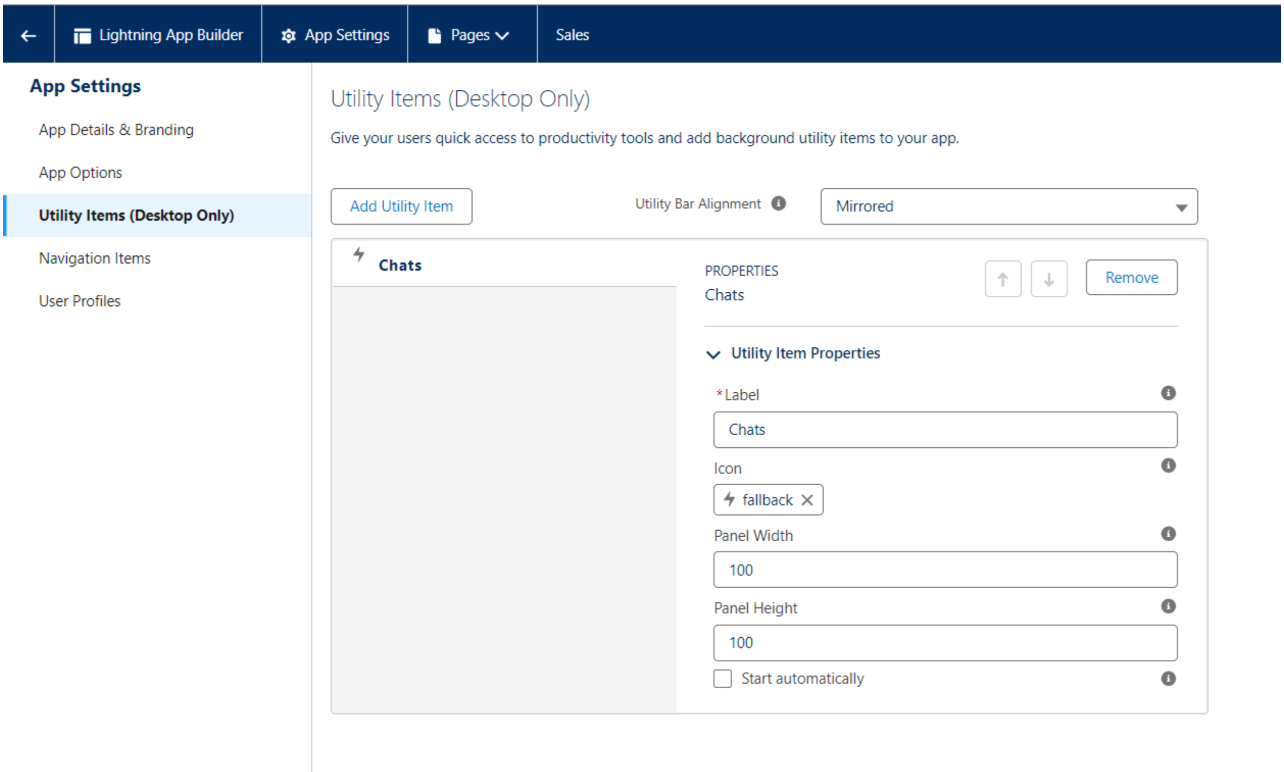
3. Edit the "Sales" app (LightningSales) by clicking on the dropdown icon & then on "Edit".



4. Click on the "Utility Items" in the navigation bar and then click on "Add Utility Item" button. Type "utilityChatBox" in the search bar & then select it.

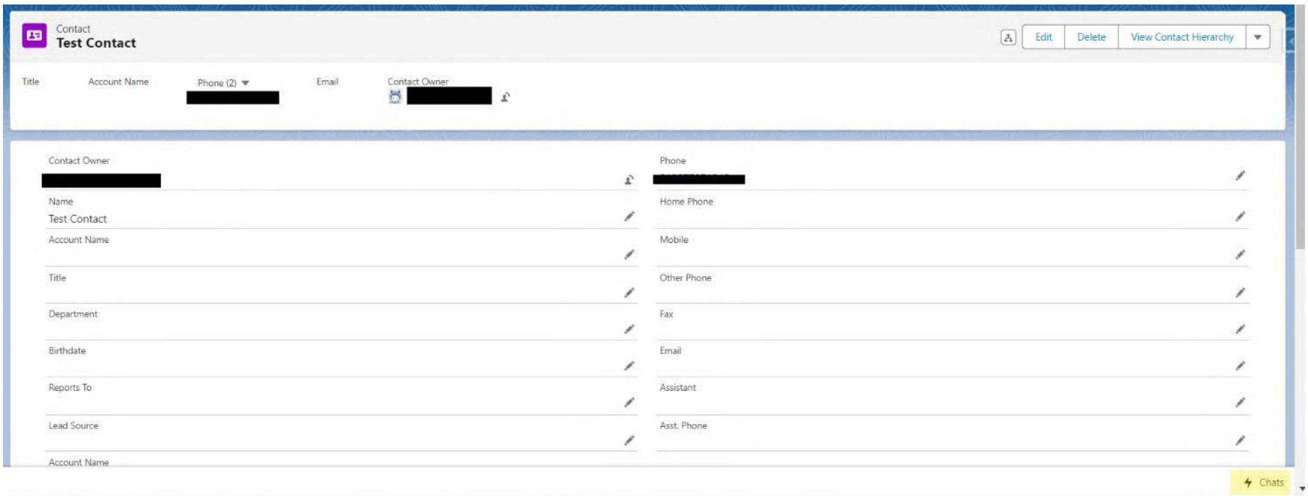


5. Populate the "Label" field with the name you want to give to this chat window. In the below example, we have labelled it as “Chat”.
6. Click on Utility Bar Alignment and select "Mirrored".
7. Select the Panel Width and Panel Height to 150 and 100 respectively.



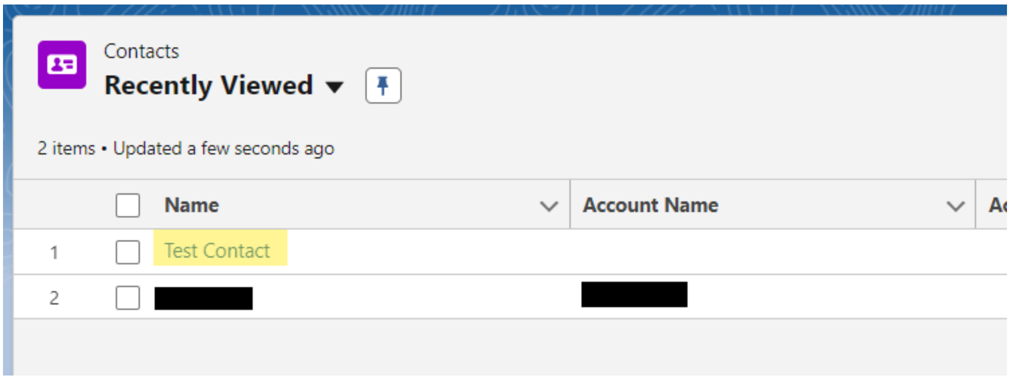
8. Click on "Save".
9. Now, go back to the Sales App & refresh the page.

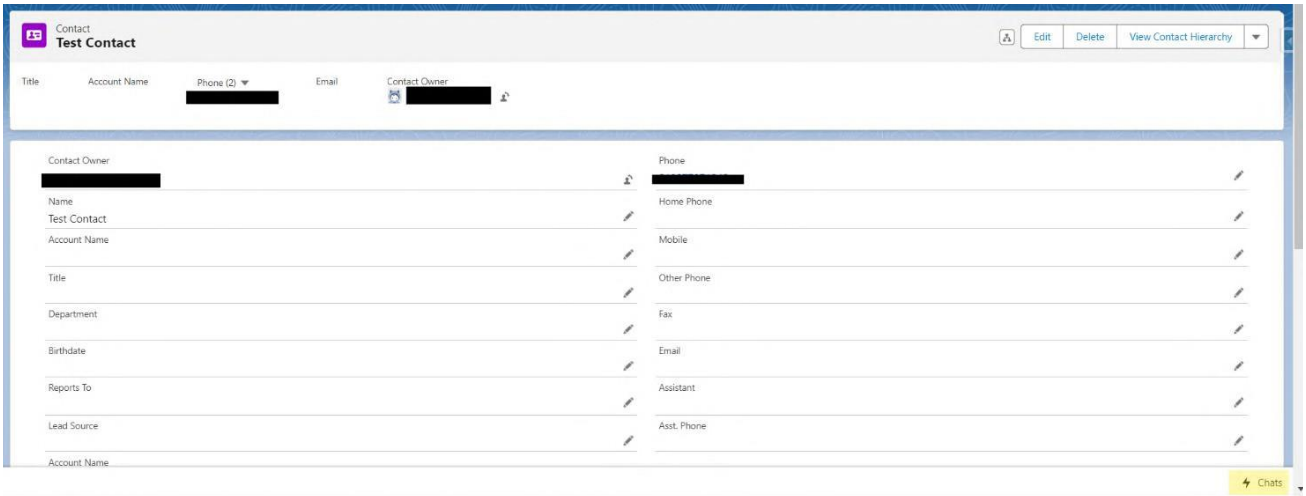
You'll see the HexaConnect chat window at the bottom right of the record page.



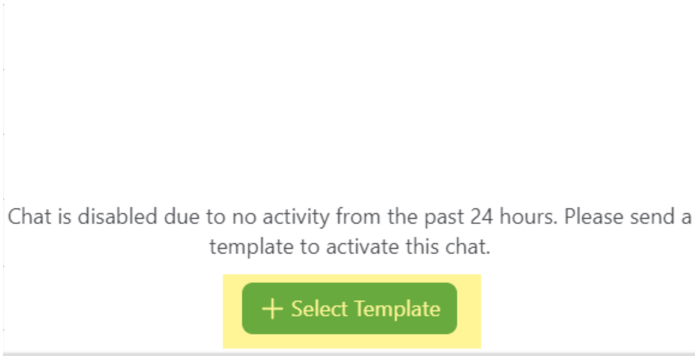
Steps to chat using the Utility Chat window

Step 1: Open the record page on Salesforce with whom you want to start the conversation.



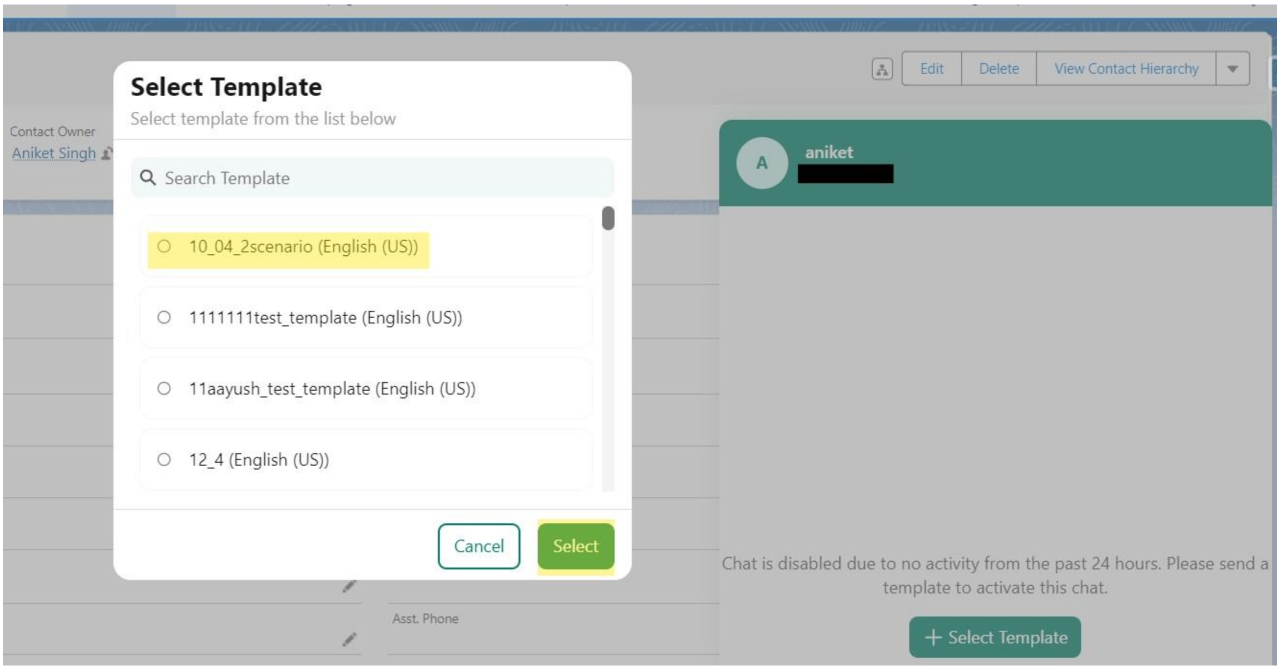


Step 2: Click on the Utility chat bar at the bottom right of the page.



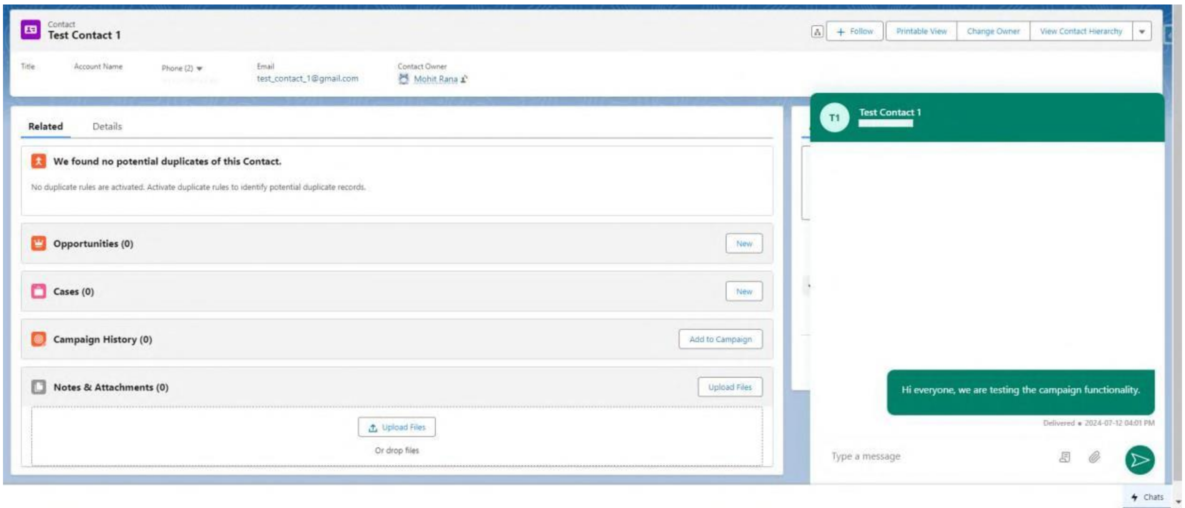
Step 3: A chat window will appear with the option to select a template (if the conversation is inactive).

Step 4: Select the pre-approved template you want to send to the record and click send.

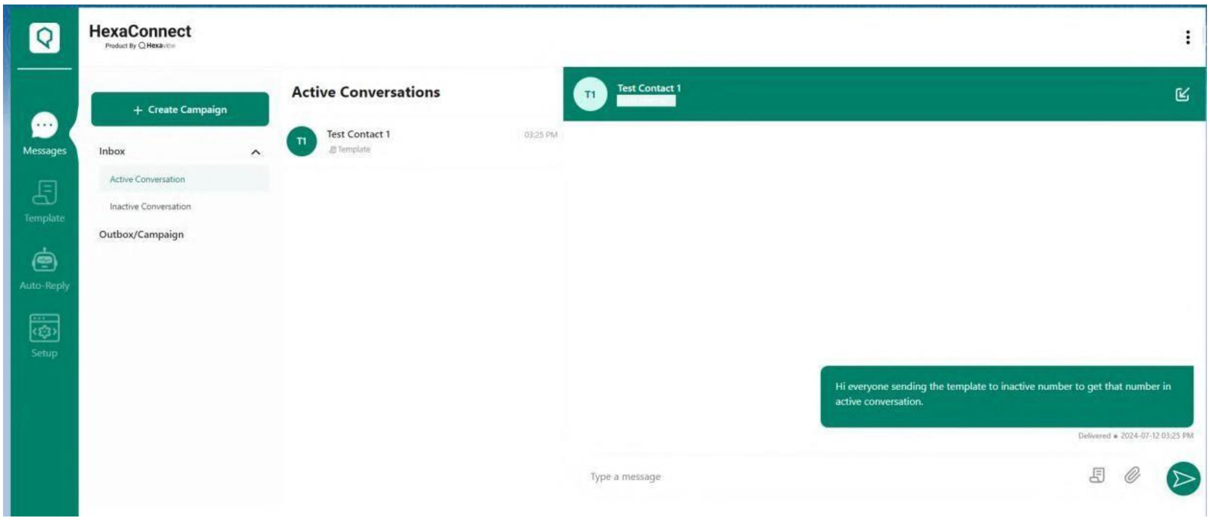


HexaConnect

Step 5: The template will be sent, and the conversation will become active.



Step 6: The conversation will move to HexaConnect's conversation window. You can either continue the conversation on the same page or use the HexaConnect messaging page.

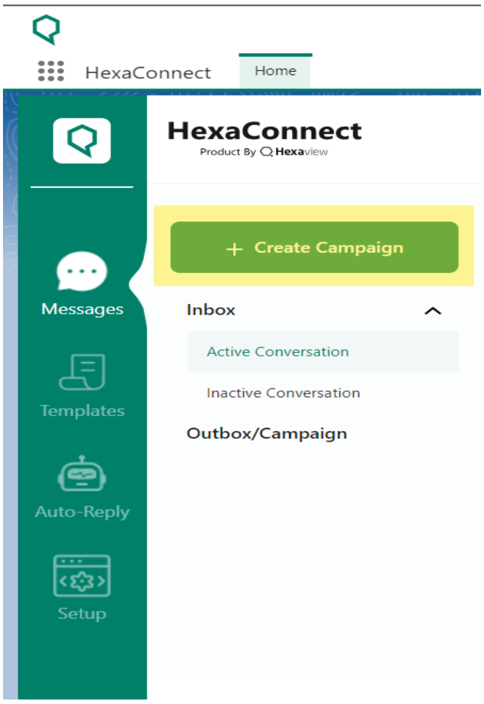


4.3 Bulk Messaging

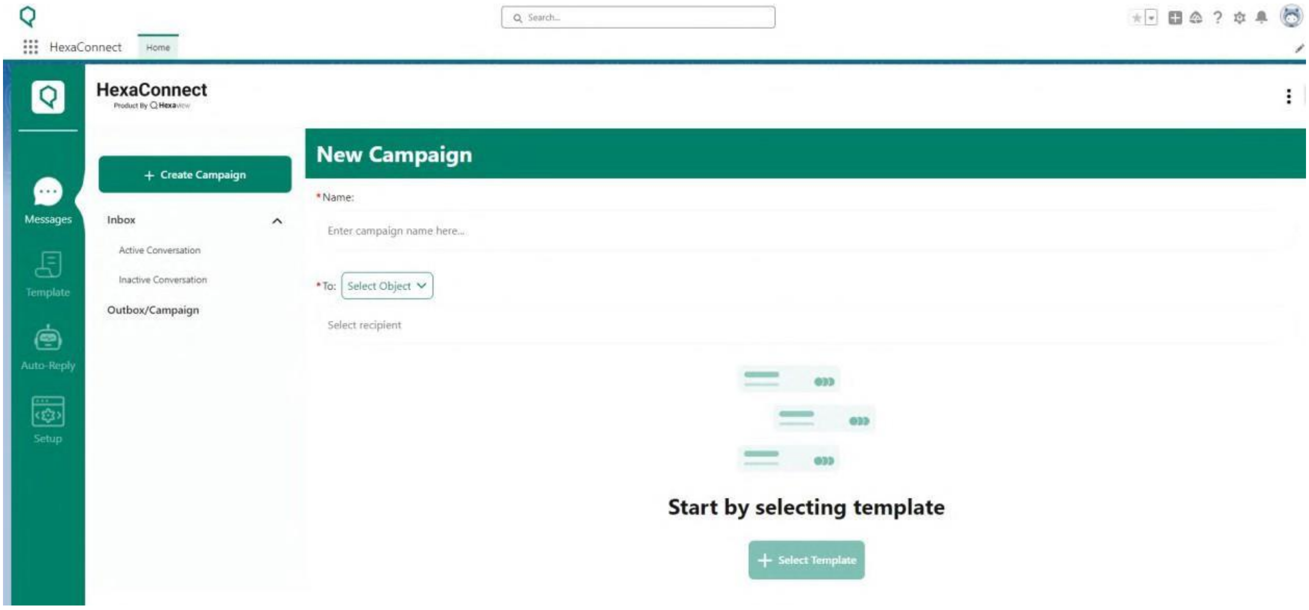
Users can send or schedule messages using pre-approved templates to multiple recipients at once using the campaign functionality.

How to create campaigns (Bulk messaging)

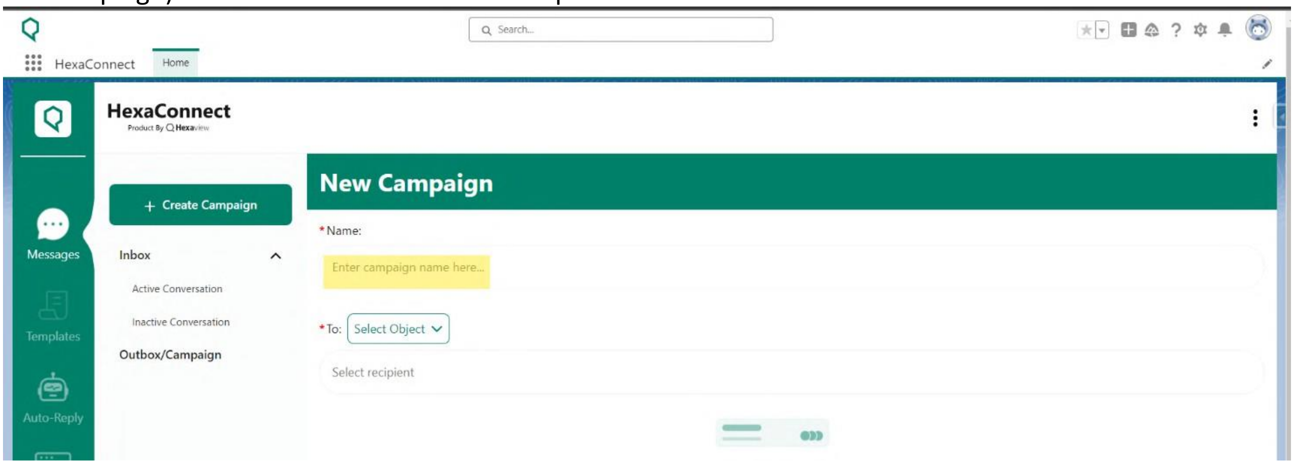
Step 1: Open the messaging tab and click on the "Create new Campaigns" button.



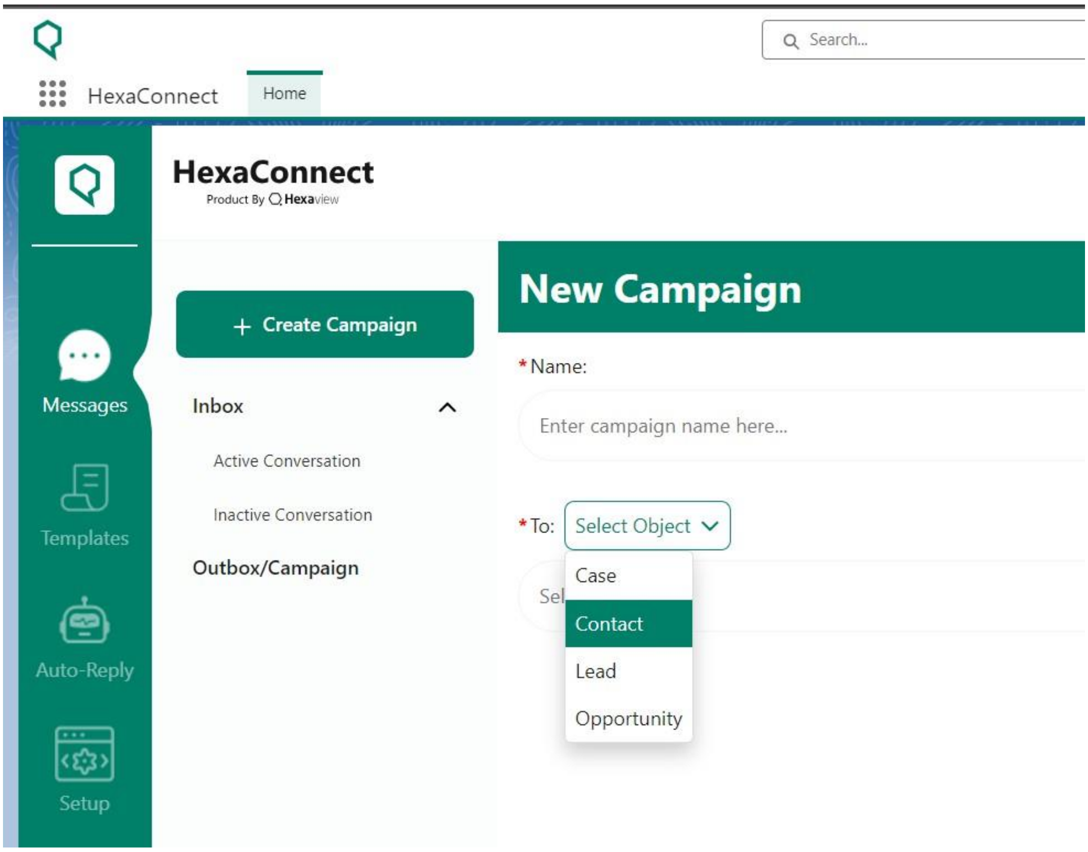
Step 2: A new tab will appear to enter campaign information.



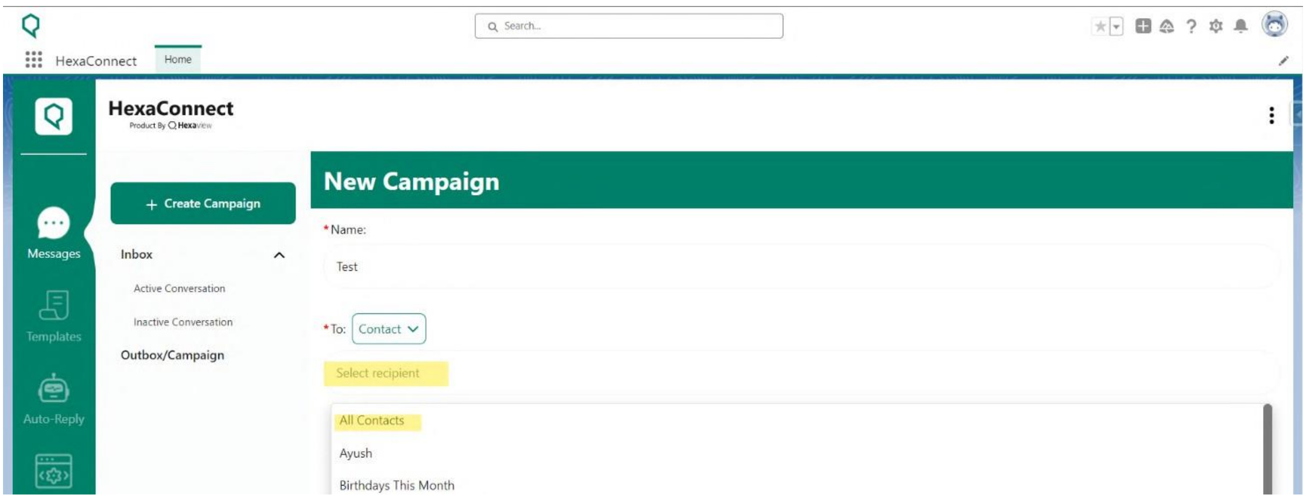
Step 3: Enter the name of the campaign. This will be used for internal purposes only (like tracking the campaign) and will not be shared with recipients.



Step 4: Select the object (Lead/Contact/Opportunity/Case) you intend to send the campaign to.

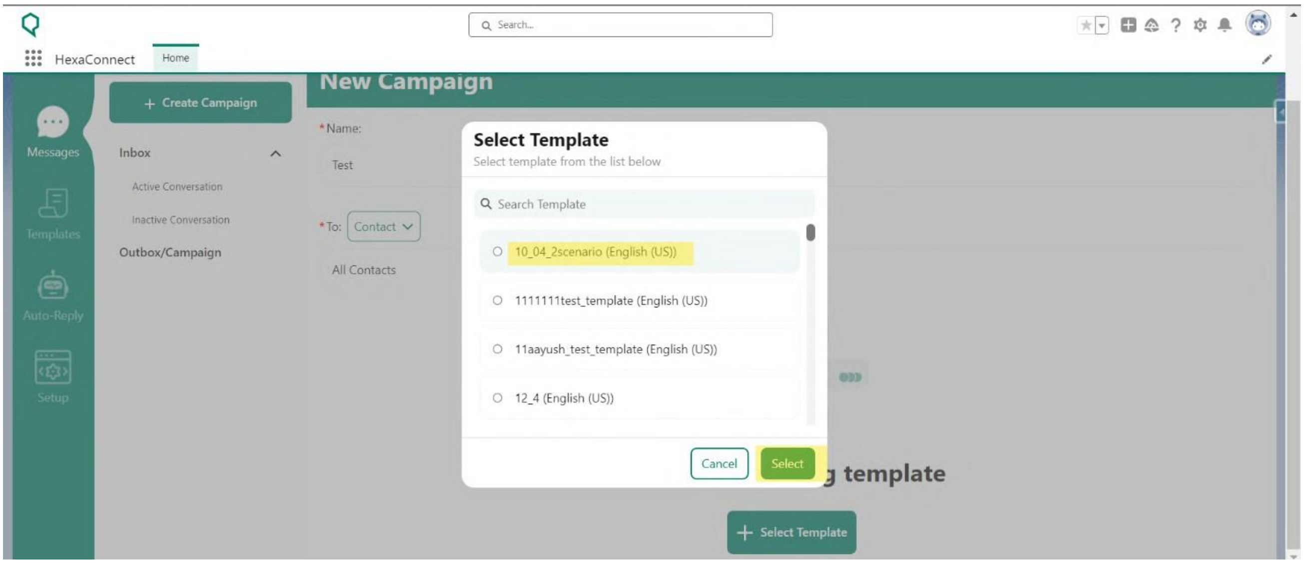


Step 5: Based on the object selection, the related list will be displayed in the next field.



Step 6: Select the list you intend to send the campaign to.

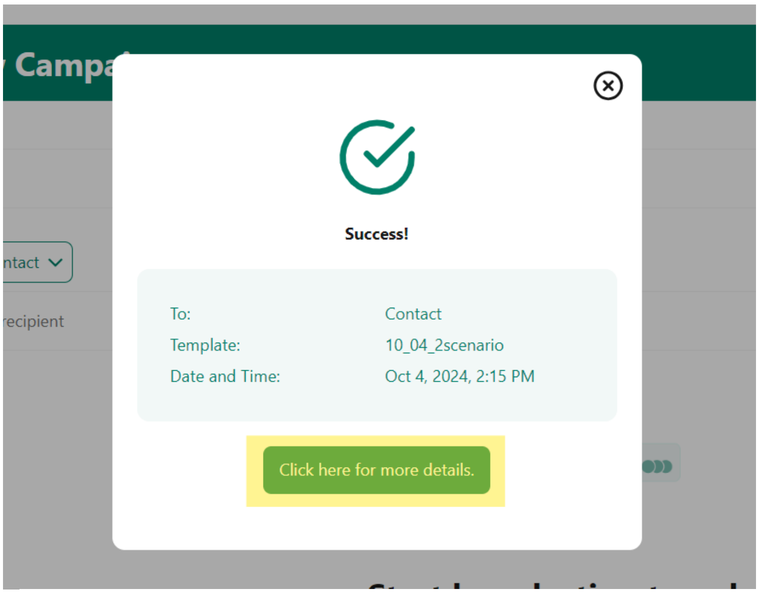
Step 7: Click on “Select Template” to choose from the pre-approved templates.

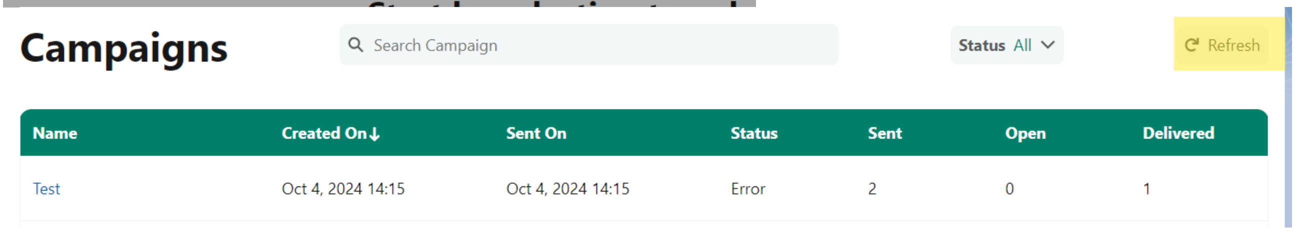


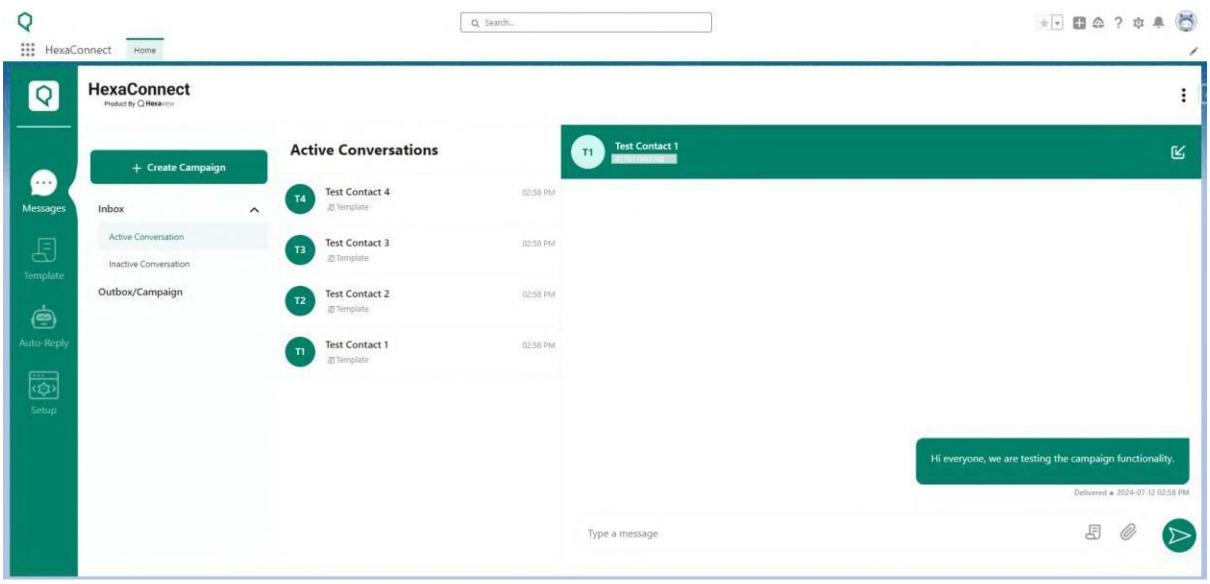
Step 8: Click on "Send" to either send the campaign immediately or schedule it for a later time.

OR

To schedule for a later time, click on the “Schedule” button. Select the date and time and click on save.







Note:

- You can choose the templates only from the list of templates that either do not contain any variable or contain variables related to the selected object for the audience list.
- The campaign can be scheduled only after 5 minutes or later than the current time.

4.3.1 Track campaigns

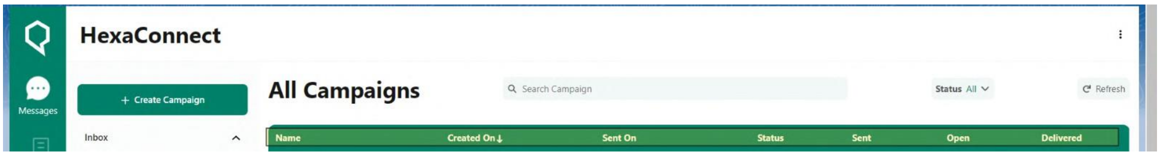
The user can view the high-level analytics of their campaign within HexaConnect, including the number of recipients, template details, date and time of sending the campaign, and its open rate.

Note: The open rate is synced with Meta and may take some time to reflect the actual numbers.

HexaConnect

How To View/Track Campaign History

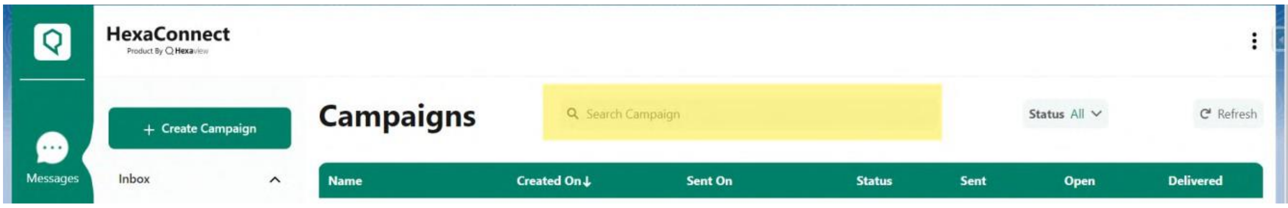
1. Go to the homepage.
2. Click on the Message tab.
3. Click on the "Outbox/Campaigns" text. A page will open with a list of all previously sent and scheduled campaigns. On this page, you can view the following details:



- Name: The name of the campaign entered at the time of creation.
- Created On: The date and time when the campaign was created.
- Sent On: The date and time when the campaign was sent or is scheduled for.
- Status: It displays the real-time status of the campaign, indicating whether it is completed, scheduled, in progress, failed, in error, or canceled.
- Sent: The number of intended recipients.
- Open: The number of messages that have been opened.
- Delivered: The number of messages that have been delivered successfully.
- Preview of the campaign message: Clicking on a campaign name allows you to view the template included in the message.

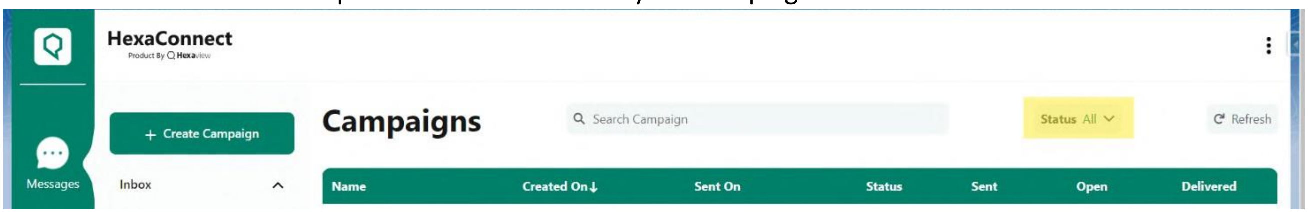
How To Search/Filter the List of Scheduled Campaign

On the top search bar, enter the name of the campaign to search for a specific campaign by name.

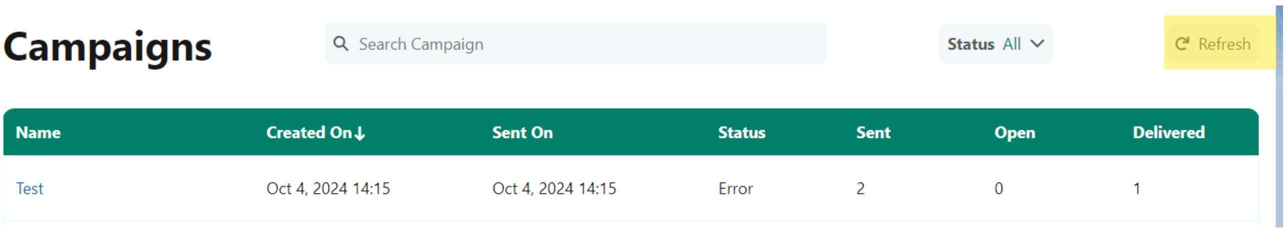


Or

You can also click on the dropdown beside the filter by the campaign status.



The Refresh Button will allow you to refresh the list of campaigns and view the latest updates.



Note: The data is synchronized from Meta, allowing instant retrieval of all the information regarding the campaign when clicking on the refresh button.

4.3.2 Edit or Cancel campaigns

If the campaign is scheduled for a later time, the user can either edit the campaign or cancel it.

To Edit

1. Click on the name of the campaign.
2. A popup will open with the preview and the options to Edit and Cancel the campaign.
3. Click on the Edit button. It will take you to the Edit campaign page with pre-filled information on the scheduled campaign.
4. You will have the ability to update the name of the campaign, date and time, and selected template. Update the field(s) you want to update and hit save.
5. A confirmation window will open. Click on Save Changes to save your changes.
6. The changes will be saved and reflected on the campaign tracking page.

Note: The edit window for campaigns expires 5 minutes before the scheduled time. Post-expiry, the user can only cancel the campaign.

To Cancel

1. Click on the name of the campaign.
2. A popup will open with the preview and the options to Edit and Cancel the campaign.
3. Click on the Cancel button if you want to cancel the scheduled campaign.
4. A confirmation window will open.
5. Click on Yes to confirm. The selected campaign will be canceled.

4.3.3 How to Create the Audience List for Campaigns

In HexaConnect campaigns, we use the lists directly from Salesforce objects. The process is same as we follow on Salesforce.

1. Open the object (Lead, Contact, Opportunity, Cases) for which you want to create a list.
2. Click on the gear icon next to the search bar and select the “Create New” list.
3. Enter the name and privacy details, then click Save.
4. Select the filters based on which you want to create the list. (For example, to create a lead list for leads with the status "Open-Not contacted" and located in India, select these filters and save the list).
5. The list will be saved based on the selected filters, and only filtered records will be included.
6. This same list can be used for sending campaigns via HexaConnect.

4.4 Templates

4.4.1 View all templates

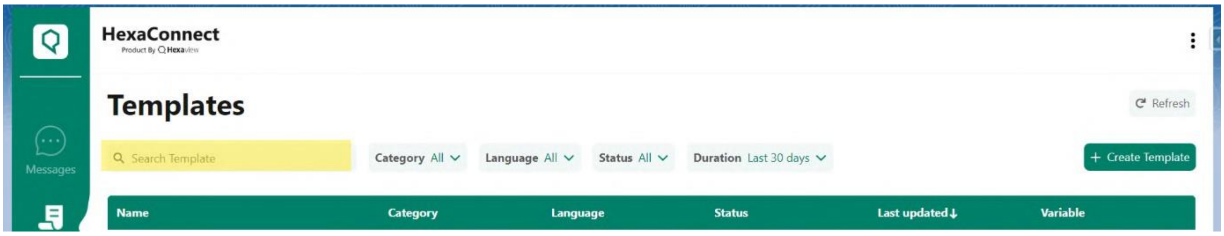
All templates created from the linked number are visible in the HexaConnect template module.

1. Go to the Homepage.
2. Click on the Templates tab in the menu bar.
3. A page displaying a list of all templates synced with the WhatsApp account will be shown.
4. The following columns will be visible:
5. Name: Name of the template saved during the creation. Click on the name to preview the template.

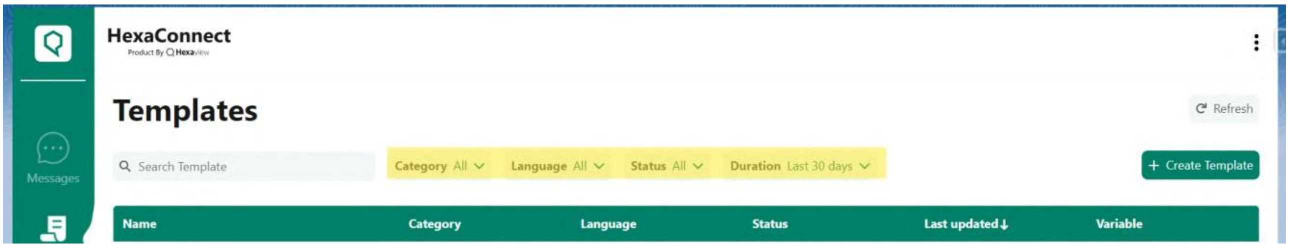
6. Category: Category of the template (Marketing/Utility/Service/Authentication).
7. Language: Language of the template saved/created in.
8. Status: The status of the template, whether approved, pending, rejected, etc.
9. Configure Variable: To configure the values of variables if present.

4.4.2 How to Search/Filter Templates

As shown in the image below, we have a search bar, where you can enter the name of the template to search for it.



Also, you have the option to filter the template list based on its category, language, status, and creation date.

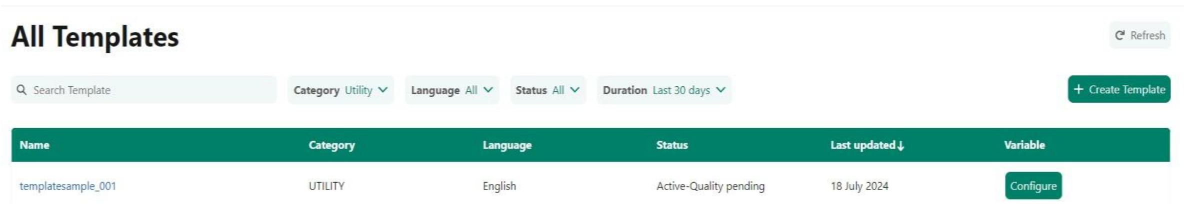


4.4.3 Configure templates

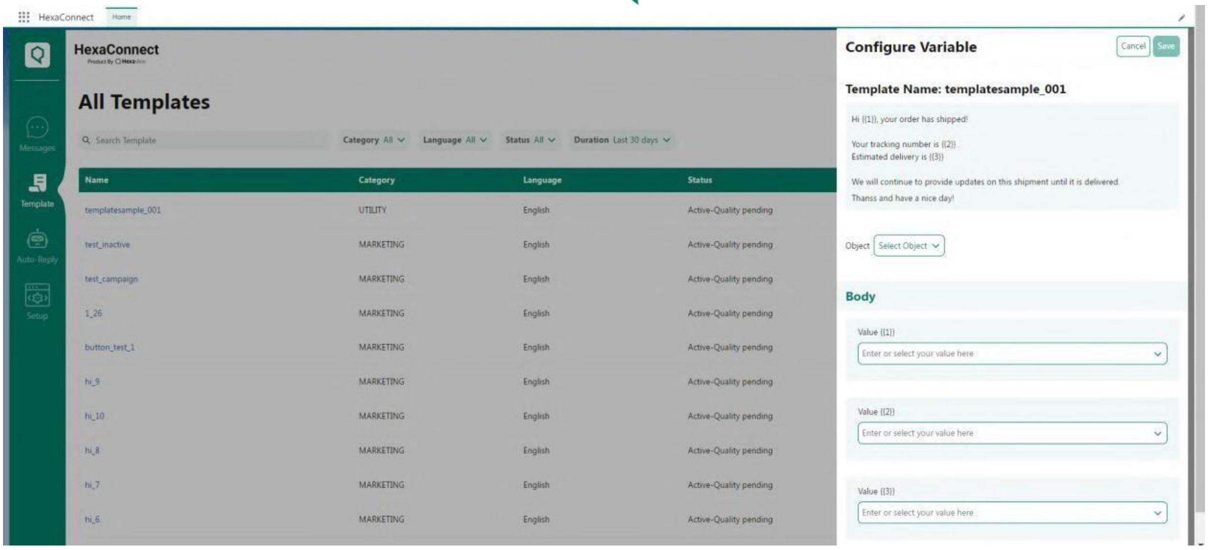
The user can configure templates (add variable values) in the HexaConnect app before sending them to the intended audience. A template that contains variables cannot be used unless all variable values are configured. The variable value may contain short or long custom text, or the user may select any value from the object field.

How to configure templates with variables:

- Click on the configure button on the row of the template you want to configure.

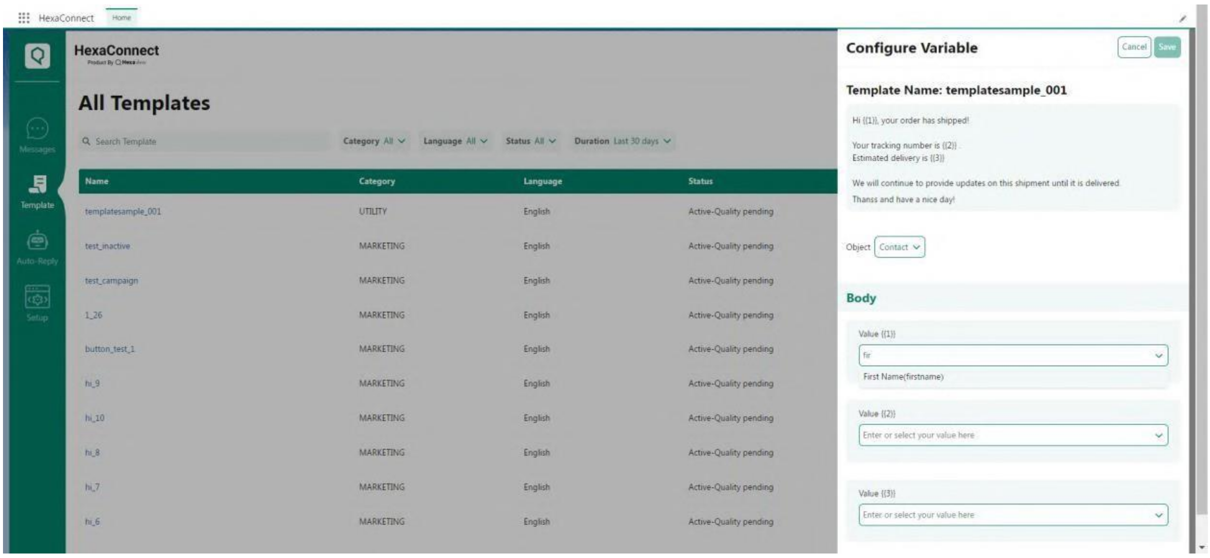


- A sidebar will open with a preview of the template and the option to enter the variable values.

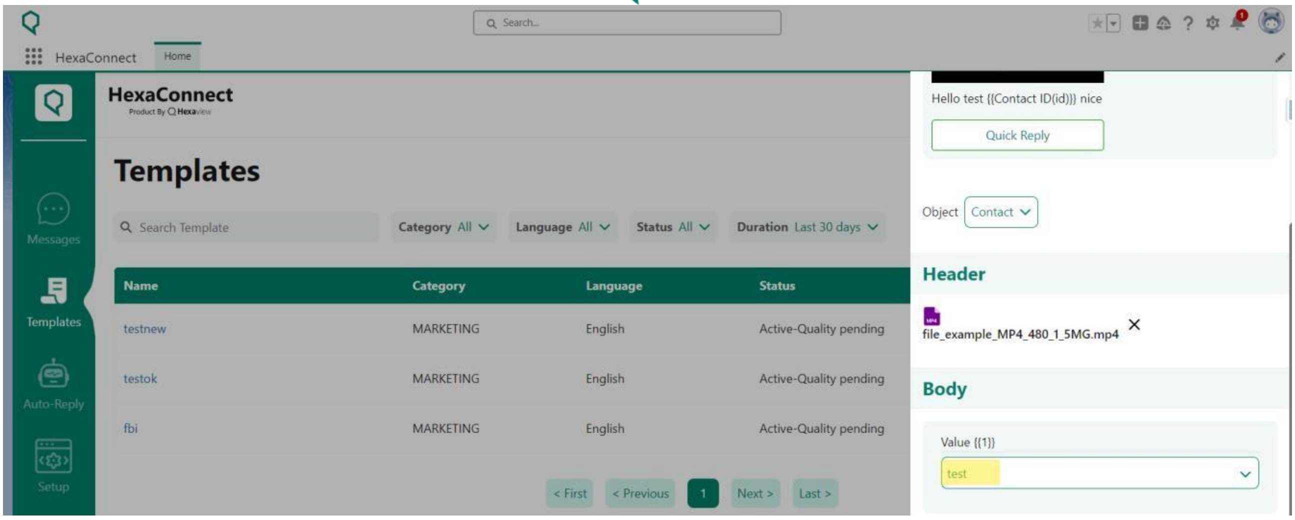


- Select the object that you want to pick variable values from records (For example, First Name orCase ID).

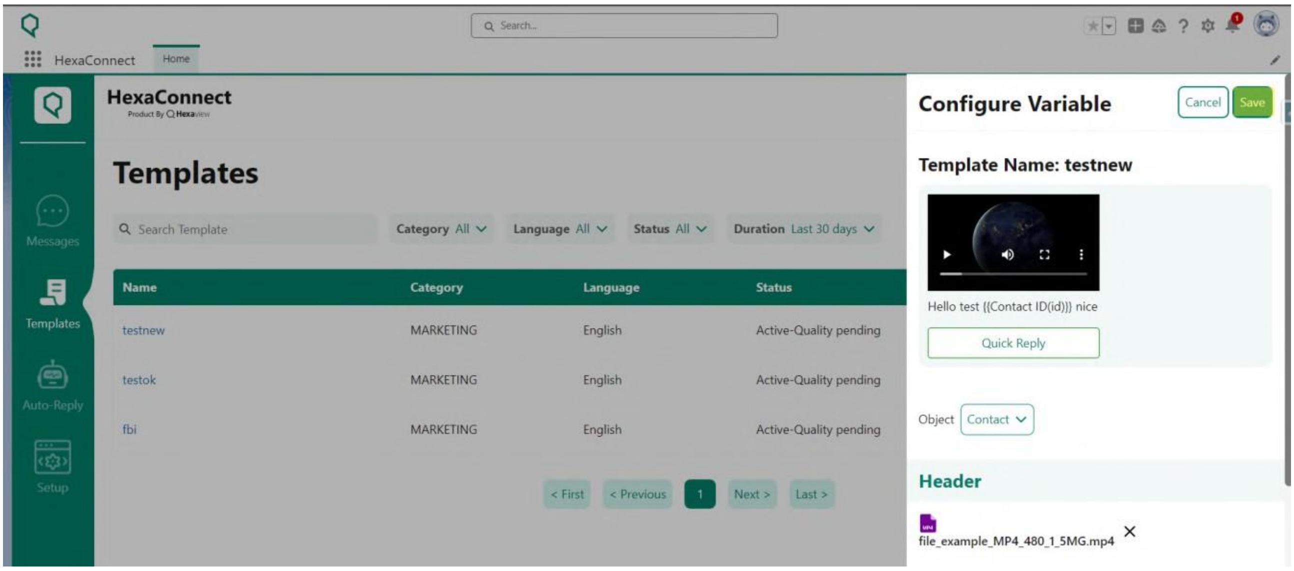
NOTE: If you need to display a related object's name (like 'Account Name' on a contact record) on the template configuration page’s dropdown, simply create a formula field that references the name of the related object. This will ensure the name appears correctly in the template setup. For example, to display the 'Account Name', create a formula field titled 'Account Name' and use the formula 'Account.Name'.



- You can also type custom text in the variables field.



- Save after entering all the variable values, and the template is ready to use.



Note: For generic templates, that do not contain any variable, no configuration is needed and hence the configuration button is disabled.

How to change the variable value in an already configured template:

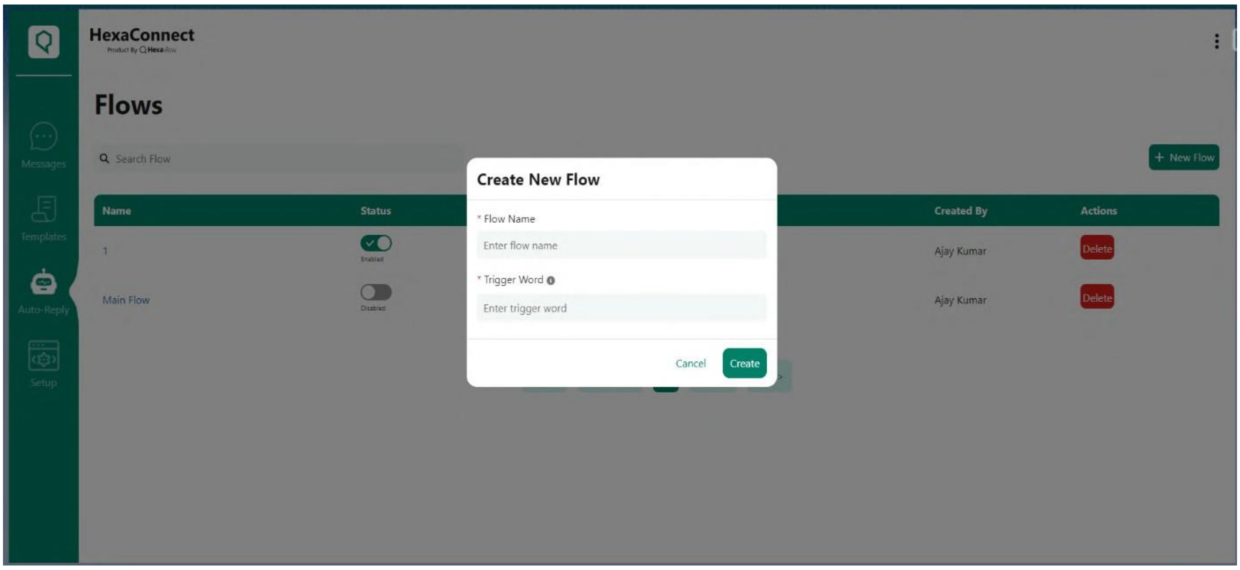
- Click on the same configure button on the row of the template you want to update.
- Make changes are required to the variable configuration.
- After making changes, hit save.
- The template configuration will be updated and is ready to use.

4.5 Auto-Reply

4.5.1 Flow Setup

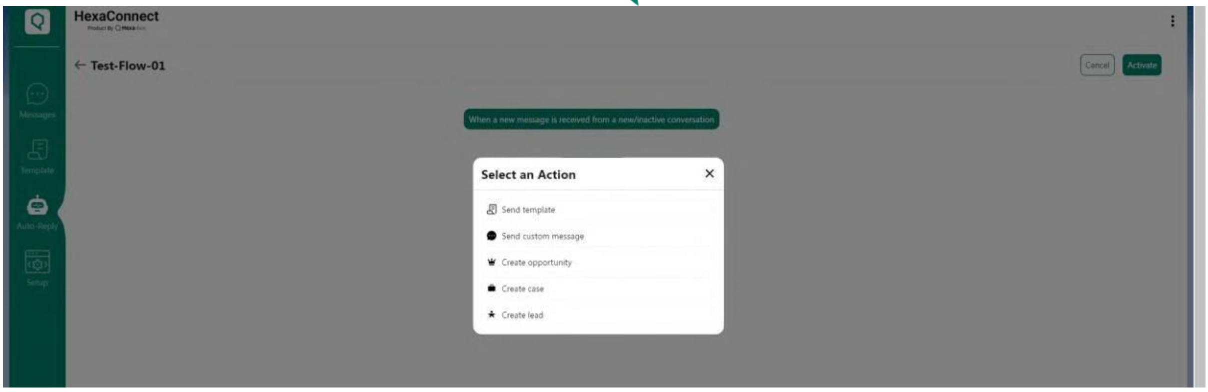
- Click on the 'Auto-Reply' tab in the HexaConnect menu and you'll be directed to the flows tab.
- Click on the new flow button to create a new auto-reply flow.

- Enter the flow name as desired. [This will be used for configuration only and not visible to recipients]

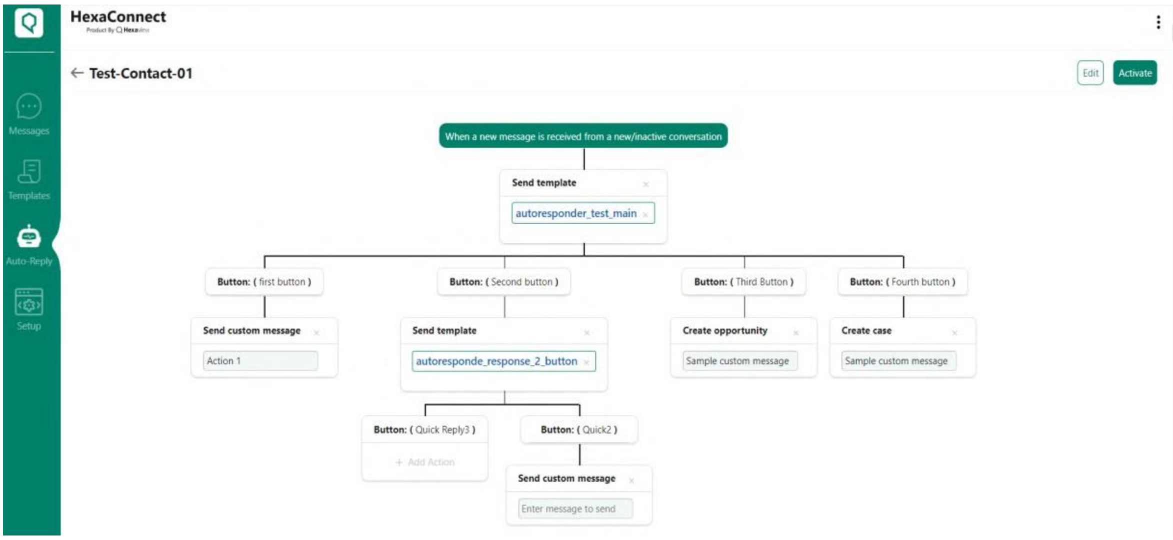


- Enter the trigger word (Example: Hi or Menu) and click on the create button. This trigger word is used to initiate the first step of the flow and helps the end-user to return to the main menu or restart the whole auto response trail.
- Click on the Create button. The user will land on the page to create a new flow.
- Then click on the add step button.

- Select an option from: Send template, Send custom message, Create opportunity, Create case, Create Lead.



- Select from the given option and create a flow as per your business requirements.
- After adding all the steps click on save > activate button.

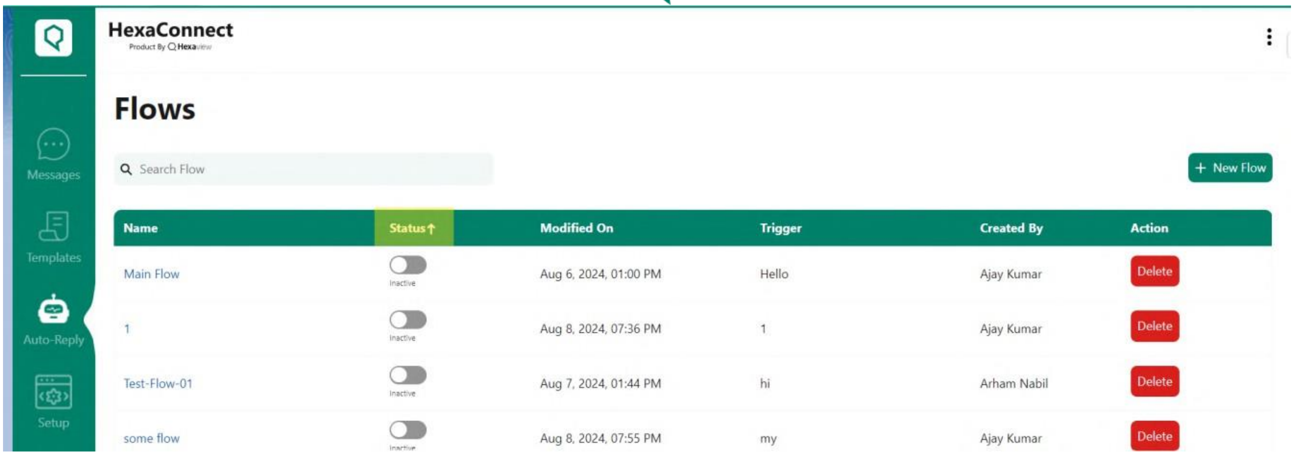


Note:

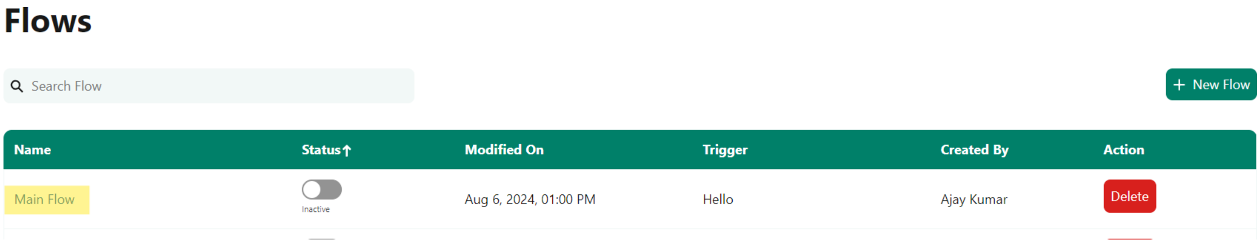
- Only templates with buttons, creation of case, lead, and opportunity will give the option to add further actions in the flow.
- The user cannot activate the flow before adding all the steps of the flow.
- The user can only edit the flow when the flow is deactivated.
- Only one flow at a time can be activated.

4.5.2 View/Edit Flows

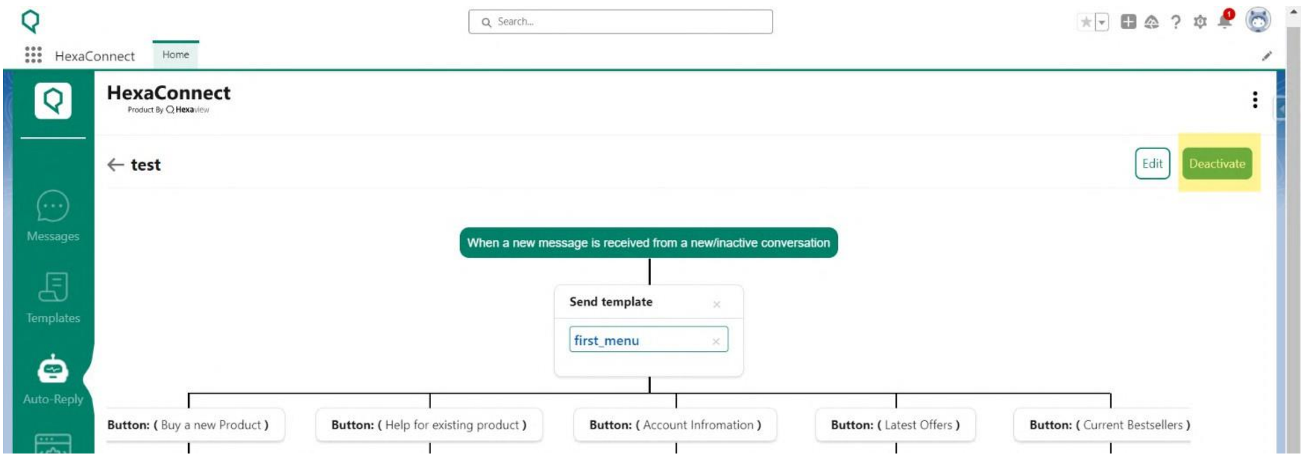
- The status column on the flow page allows for the management of a flow's activation or deactivation.



- Click on the flow Name for which you want to view/edit the flow.

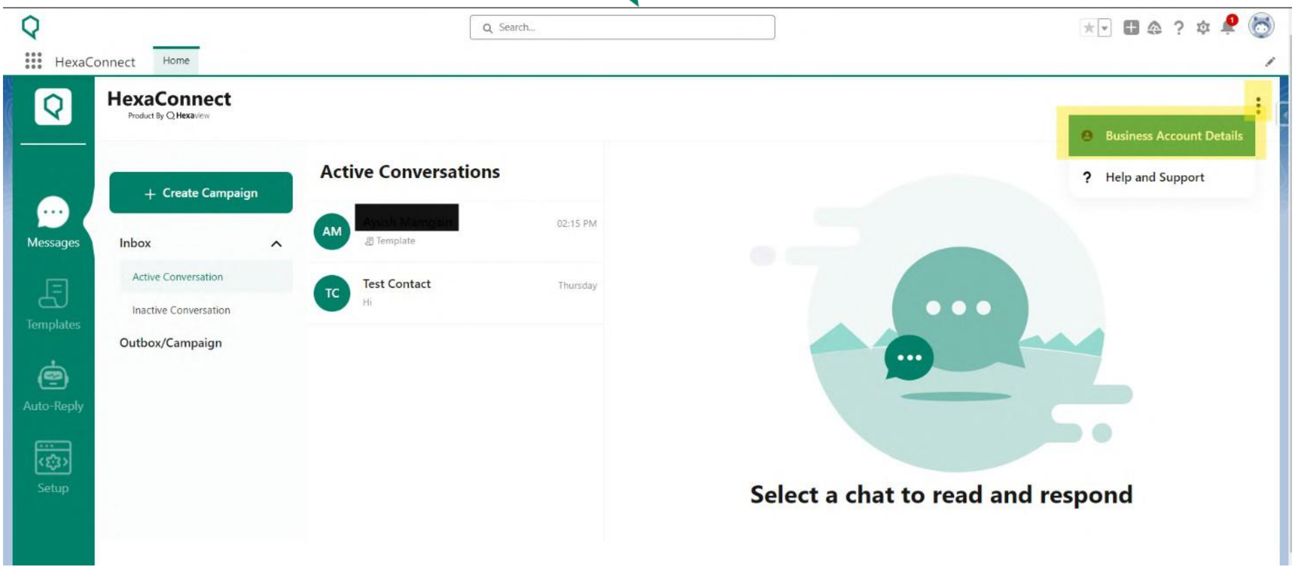


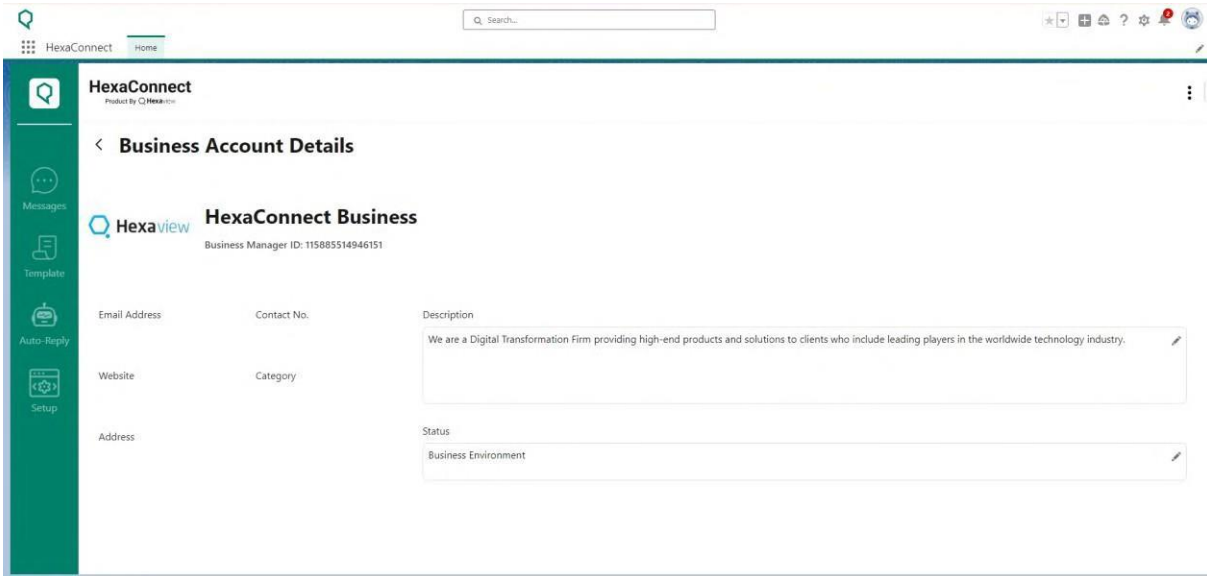
- If the flow is active the user must deactivate the flow first for any changes to be made.



4.6 Account Information

4.6.1 View account information – When the user clicks on their profile icon, they land on the account information page. The page comprises the information about their linked WhatsApp Business Account. They can view their profile picture, business name, Business ID, Address, About, Description, Email, profile picture, website, and industry.





4.6.2 Update account information – The user can update the following fields by hovering on the field and clicking on it, updating the information, and clicking on save.

- Website
- Description
- Address
- Profile picture

5. Troubleshooting

5.1 Common issues

5.1.1 Campaigns issue

Failed: When the status displays as failed, the whole campaign has not been delivered. The following could be the reason:

- The template is not in an active state by Meta.
- The variable value has been wrongly configured.
- The recipient contact list does not exist.
- The WhatsApp account needs to be reconfigured.

Error: When the status displays as an error, the campaign has not been sent to one or more recipients of the list. The following could be the reason:

- The Salesforce governor limit has been hit.
- The template in concern is edited while the campaign is ongoing.
- The account configuration is changed while the campaign is ongoing.
- The variable value field is blank on the Salesforce record.

6. Support

To connect with the support team, please drop an email to hexaconnect@hexaviewtech.com