



USER GUIDE



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HexaConnect

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Document History

HexaConnect User Guide	
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

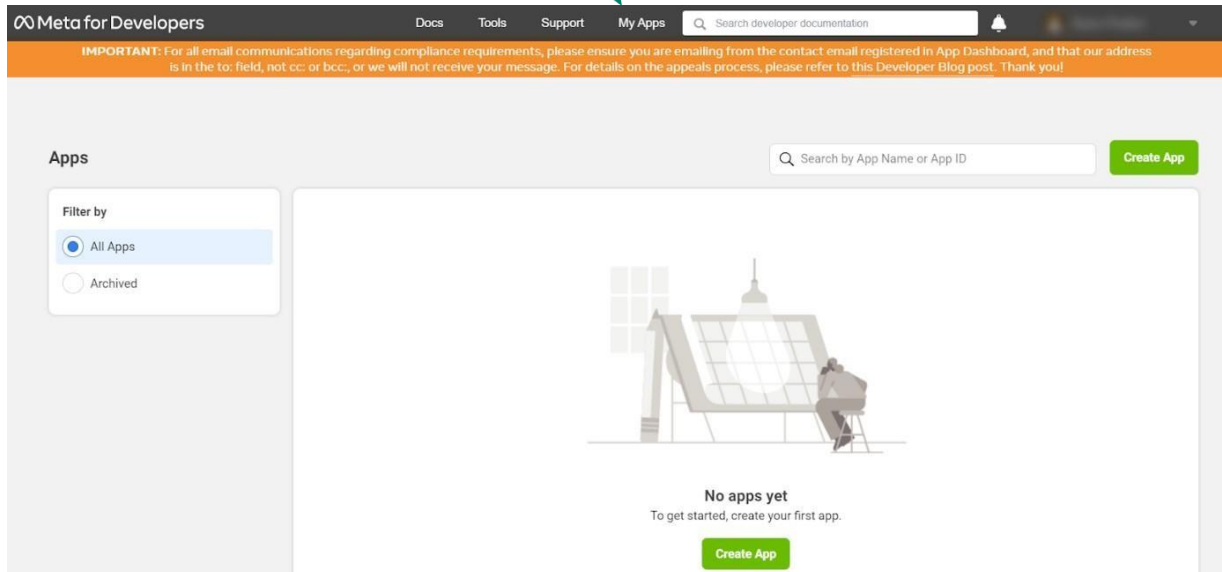
- Go to [Business settings](#).
- Select Business info from the sidebar.
- Below your business portfolio name, you'll find your business ID number.
- Copy the business ID and save it.

2.2.3 Register as a Meta Developer

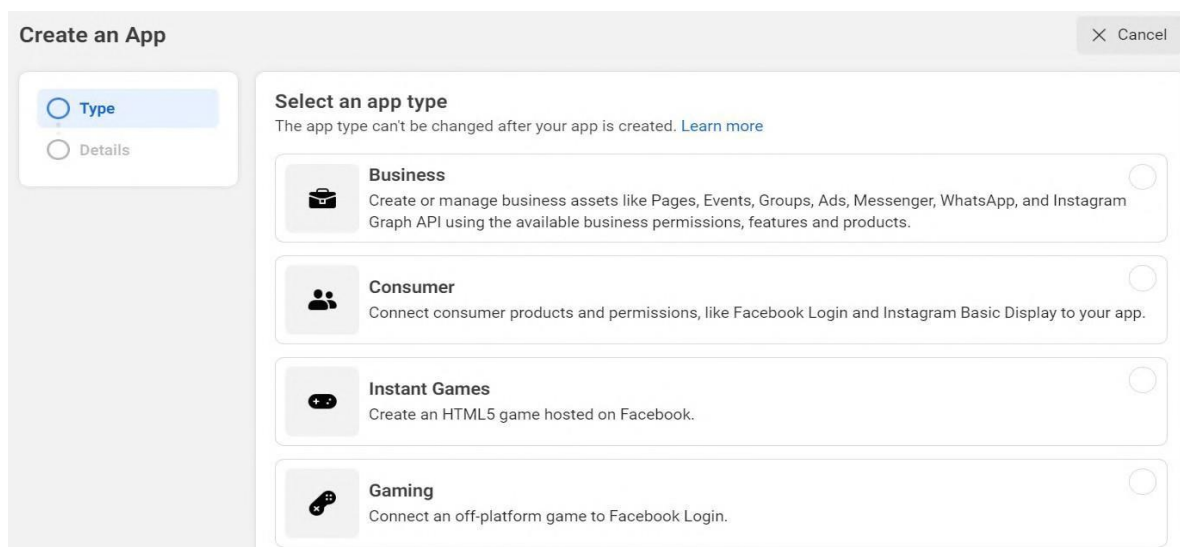
- While logged into your Facebook account, go to the [registration page](#).
- Provide the necessary information and submit.

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.

Create an App ✕ Cancel

Type Details

Provide basic information

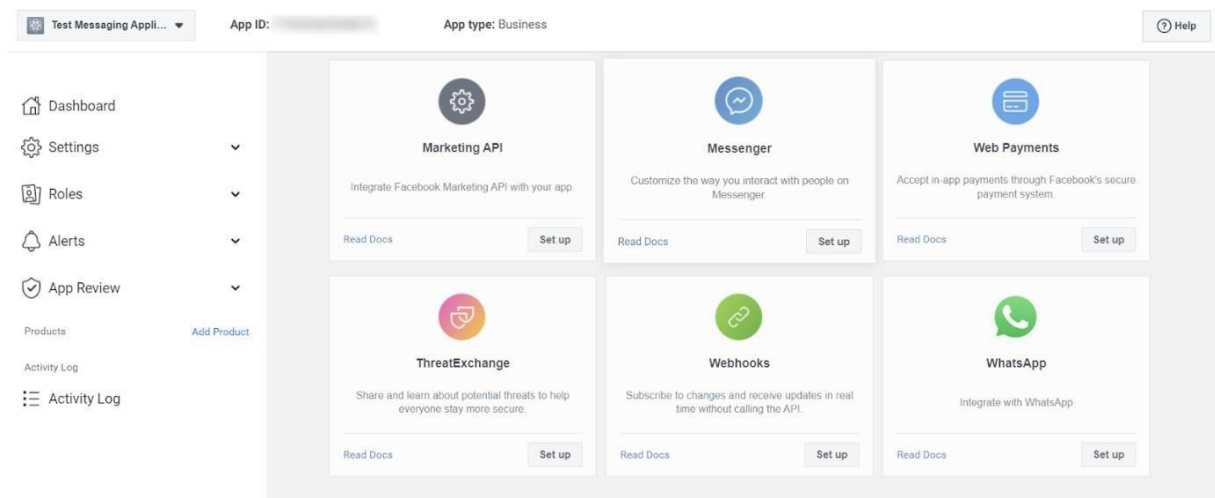
Display name
This is the app name associated with your app ID. You can change this later.
 26/32

App contact email
This email address is used to contact you about potential policy violations, app restrictions or steps to recover the app if it's been deleted or compromised.

Business Account - Optional
To access certain permissions or features, apps need to be connected to a Business Account.

By proceeding, you agree to the [Facebook Platform Terms](#) and [Developer Policies](#). Previous 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.

The screenshot displays the Salesforce Setup interface for configuring a new site. The top section, 'What is a Site?', explains that Salesforce sites enable public websites and applications integrated with the Salesforce organization. It provides sample domain names and URLs for different audiences (customers, developers, partners). Below this, the 'Settings' section shows options for using standard external profiles for self-registration, user creation, and login. The 'Sites' table lists the newly created site, 'HexaConnectTest', with its URL and active status. The 'Site Details' section for 'HexaConnectTest' shows various configuration options, including site description, home pages, analytics tracking, and security settings. The 'Public Access Settings' tab is currently selected, showing options for enabling content sniffing protection, referrer URL protection, and guest access to the Payments API.

What is a Site?

Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.

Sample sites URLs

Sample Domain Name: hexaviewpartnertest-dev-ed.develop.my.salesforce-sites.com

Sample sites URLs:

- hexaviewpartnertest-dev-ed.develop.my.salesforce-sites.com/customers
- hexaviewpartnertest-dev-ed.develop.my.salesforce-sites.com/developers
- hexaviewpartnertest-dev-ed.develop.my.salesforce-sites.com/partners

Your Salesforce site domain name is hexaviewpartnertest-dev-ed.develop.my.salesforce-sites.com

Settings

These settings affect all Salesforce sites.

☒ Allow using standard external profiles for self-registration, user creation, and login

Sites (hexaviewpartnertest-dev-ed.develop.my.salesforce-sites.com)

Action	Site Label	Site URL	Site Description	Active	Site Type	Last Modified By
Edit Deactivate	HexaConnectTest	http://hexaviewpartnertest-dev-ed.develop.my.salesforce-sites.com		☒	Force.com	

Site Details: HexaConnectTest

[Back to List Sites](#)

Site Detail

Site Label: HexaConnectTest

Site Description: Active

Active Site Home Page: [AnswersHome \(Preview\)](#)

Inactive Site Home Page: [InMaintenance \(Preview\)](#)

Site Template: [SiteTemplate \(Preview\)](#)

Analytics Tracking Code: Allow framing by the same origin only (Recommended)

Clickjack Protection Level: ☒ [More Info](#)

Enable Content Sniffing Protection: ☒ [More Info](#)

Referrer URL Protection: ☒ [More Info](#)

Guest Access to the Payments API: ☐ [More Info](#)

Default Record Owner: [HexaConnectTest](#) [More Info](#)

Cache public Visualforce pages: ☒ [More Info](#)

Created By: [HexaConnectTest](#)

Site Name: HexaConnectTest

Site Contact: Login

Site Favorite Icon: Not Allowed

Site Robots.txt: ☐ [More Info](#)

Enable Feeds: ☐ [More Info](#)

URL Rewriter Class: ☒ [More Info](#)

Lightning Features for Guest Users: ☒ [More Info](#)

Enable Browser Cross Site Scripting Protection: ☒ [More Info](#)

Allow only required cookies for this site: ☐ [More Info](#)

Guest Access to the Support API: ☐ [More Info](#)

Redirect to custom domain: ☒ [More Info](#)

Last Modified By: [HexaConnectTest](#)

HexaConnect

- Scroll down and click on Object Settings.

Profile
HexaConnectTest Profile

Find Settings... Edit Properties

Profile Overview Assigned Users

Description
User License Guest User License
Created By Admin User 21/02/2024 10:10:00 Custom Profile ☐
Last Modified By Admin User 21/02/2024 10:10:00

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

- From Objects Name choose Opportunity and click on Edit.

SETUP Profiles

Lightning Bolt Solutions	LightningBoltSolution	--	--	Tab Hidden	--
Lightning Usage	LightningInstrumentation	--	--	Tab Hidden	--
List Emails	ListEmail	--	--	Tab Hidden	Not Assigned
Locations	Location	No Access	27	Tab Hidden	Location Layout
Lookup Tables	DecisionTable	--	--	Default On	--
Message Templates	HexaConnect_Message_Template__c	No Access	31	Tab Hidden	Message Template Layout
Mobile Home	MobileHome	--	--	Tab Hidden	--
newChatMessages	HexaConnect_newChatMessage__e	No Access	--	--	--
Object Milestones	EntityMilestone	--	21	--	Object Milestone Layout
Omnichannel Inventory	OmnichannelInventory	--	--	Tab Hidden	--
Omni Data Transformation Items	OmniDataTransformItem	No Access	36	Tab Hidden	Not Assigned
Omni Data Transformations	OmniDataTransform	No Access	43	Tab Hidden	Not Assigned
Omni Process Compilations	OmniProcessCompilation	No Access	4	Tab Hidden	Not Assigned
Omni Process Elements	OmniProcessElement	No Access	15	Tab Hidden	Not Assigned
Omni Processes	OmniProcess	No Access	27	Tab Hidden	Not Assigned
Omni UI Cards	OmniUICard	No Access	17	Tab Hidden	Not Assigned
Opportunities	Opportunity	Read, Create	31	Tab Hidden	Opportunity Layout
Opportunity Contact Role	OpportunityContactRole	--	6	--	Not Assigned
Opportunity Product	OpportunityLineItem	--	14	--	Opportunity Product Layout
Orchestration Runs	FlowOrchestrationInstance	--	6	Default On	Not Assigned
Orchestration Stage Runs	FlowOrchestrationStageInstance	--	6	--	Not Assigned

SETUP Profiles

Profile
HexaConnectTest Profile

Find Settings... Edit Properties

Profile Overview > Object Settings Opportunities

Opportunities Edit

Tab Settings
Tab Hidden

Opportunity: Record Types and Page Layout Assignments

Record Types	Page Layout Assignment	Assigned Record Types
--Master--	Opportunity Layout	☒

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

Profile HexaConnectTest Profile

[Edit Properties](#)[Profile Overview](#) > [Object Settings](#) ▾ [Opportunities](#) ▾

Opportunities

[Save](#)[Cancel](#)

Tab Settings

[Tab Hidden](#) ▾

Opportunity: Record Types and Page Layout Assignments

Record Types	Page Layout Assignment
--Master--	Opportunity Layout ▾

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒

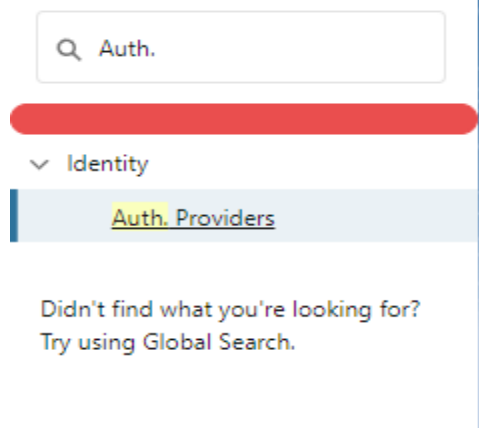
Field Permissions

Field Name	Field API Name	☒ Read Access	☒ Edit Access
Account Name	AccountId	☒	☒
Account Name	Account_Name__c	☒	☐
Amount	Amount	☒	☒
Close Date	CloseDate	☐	☒

- 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

Auth. Providers

Auth. Providers

Action	Name	URL Suffix	Provider Type	Created Date
Edit Del	Salesforce Auth Provider	Salesforce_Auth_Provider	Salesforce	26/02/2024, 5:24 pm

- Select 'Open ID Connect' from the dropdown.

Auth. Provider

Auth. Provider Edit

Provider Type: **Open ID Connect**

Save Save & New Cancel

- 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

Auth. Provider

Auth. Provider Edit

Save Save & New Cancel

Provider Type: **Open ID Connect**

Name: **GraphApi**

URL Suffix: **GraphApi**

Consumer Key: [Redacted]

Consumer Secret: [Redacted]

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>**

Use Proof Key for Code Exchange (PKCE) Extension: ☒

Token Issuer: [Redacted]

Default Scopes: **catalog_management whats**

Send access token in header: ☒

Include Consumer Secret in SOAP API Responses: ☒

Custom Error URL: [Redacted]

Custom Logout URL: [Redacted]

Registration Handler: **Automatically create a registration handler template**

Execute Registration As: [Redacted]

Portal: **--None--**

Icon URL: **Choose one of our sample icons**

Use Salesforce MFA for this SSO Provider: ☐

Save Save & New Cancel

- Finally click on save.

HexaConnect

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

Salesforce Configuration	
Test-Only Initialization URL	
Existing User Linking URL	
OAuth-Only Initialization URL	
Callback URL	
Single Logout URL	

► Experience Cloud Sites

Edit Delete Clone

- 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.

 **Dashboard**

 Required actions

 App settings 

 App roles 

 Alerts 2 

 App Review 

Products [Add Product](#)

Facebook Login for Business 

Settings

Quickstart

Configurations

Webhooks

WhatsApp 

Valid OAuth Redirect URIs

A manually specified redirect_uri used with Login on the web must exactly match one of the URIs listed here. This list is also used by the JavaScript SDK for in-app browsers that suppress popups. [?]

Valid OAuth redirect URIs.

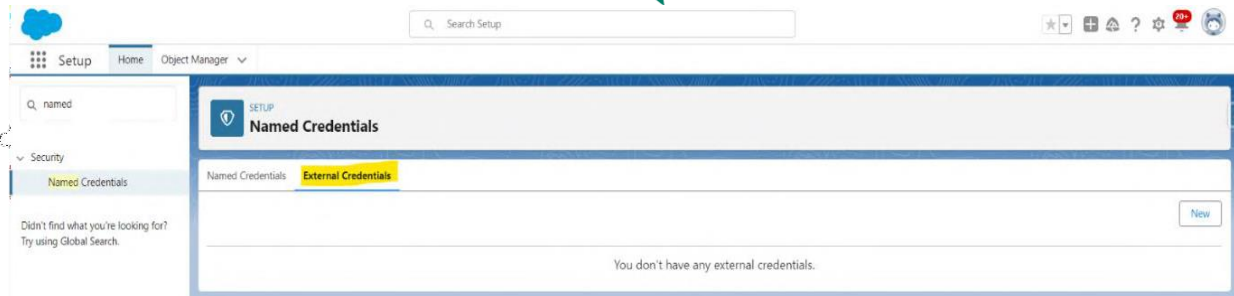
Copy to clipboard

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

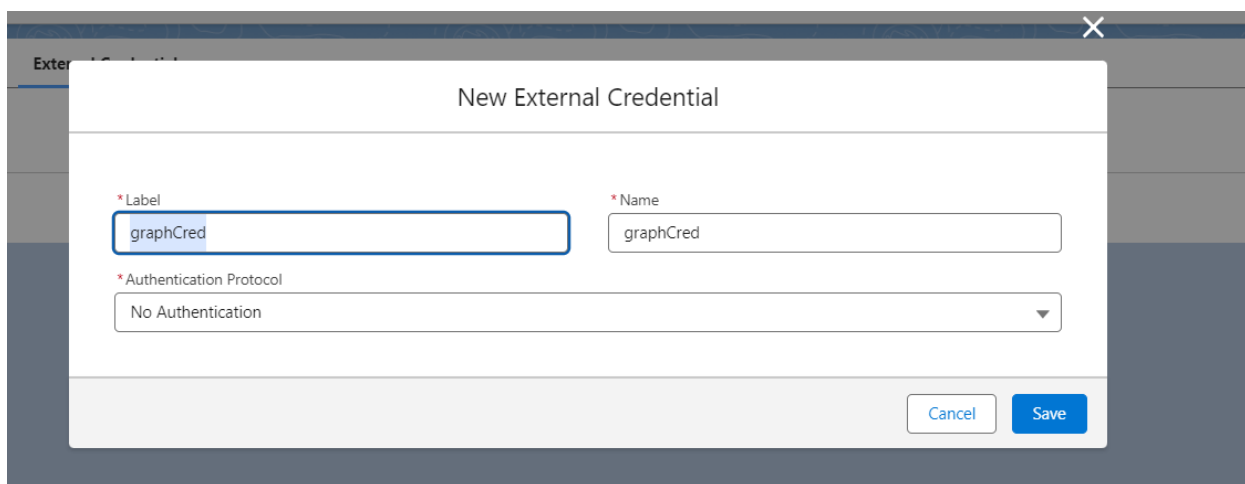
2.3.2 External Credentials Setup:

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

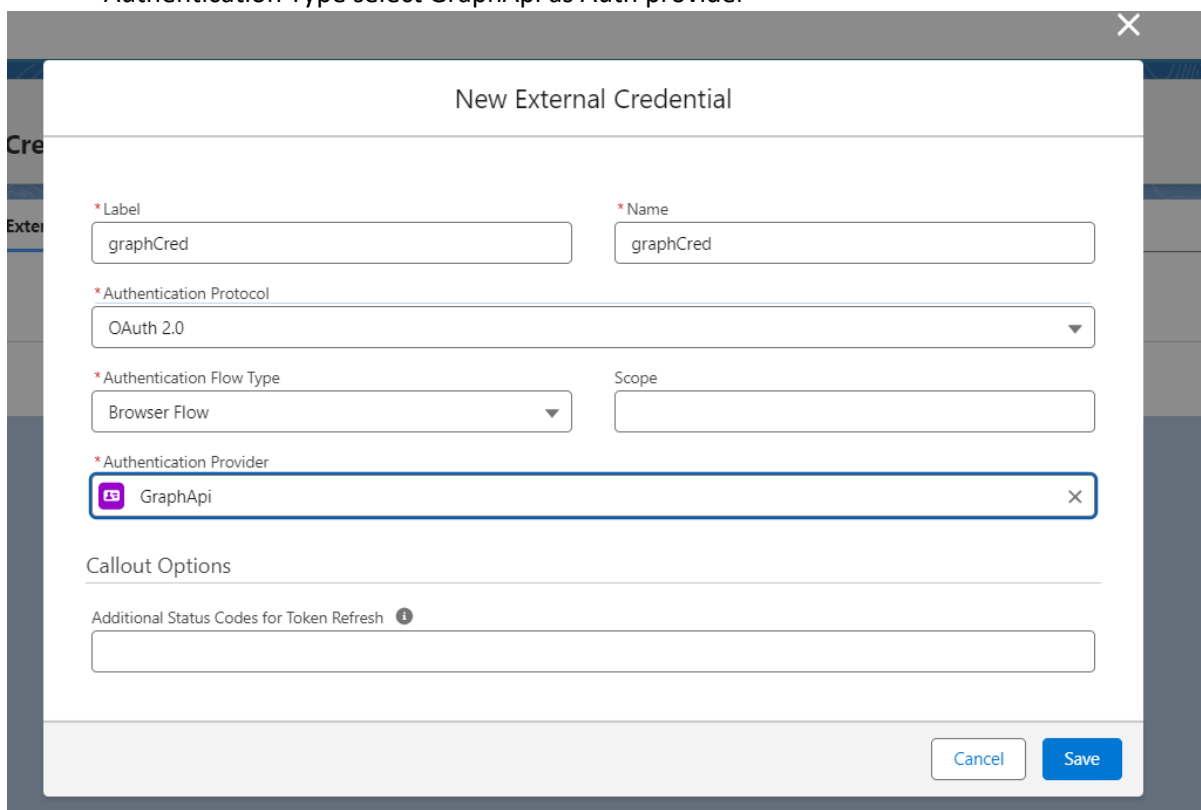
HexaConnect



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

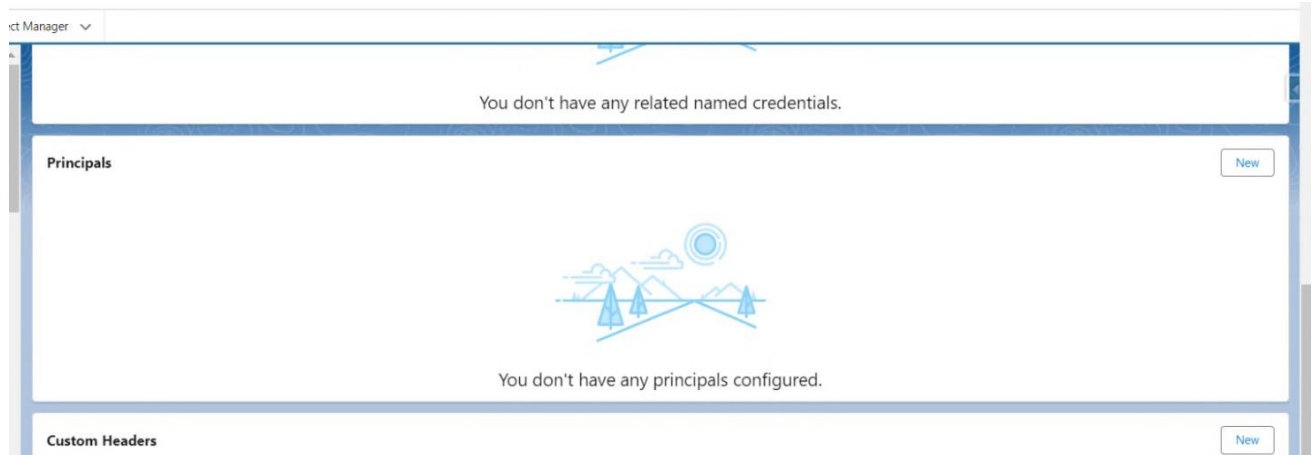


- In Authentication Protocol select OAuth 2.0, Authentication Flow Type – Browser Flow, In Authentication Type select GraphApi as Auth provider



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'.

You don't have any related named credentials.

Create Principal

* Parameter Name:

* Sequence Number:

* Identity Type:

Scope:

- Click on Save.
- Click on Action.

Principals						New
Seque...	Parameter Name	Identity Type	Sc...	Authentication Status	Actions	
1	AuthenticateGraphCred	Named Principal		Not Configured		

- Click on Authenticate

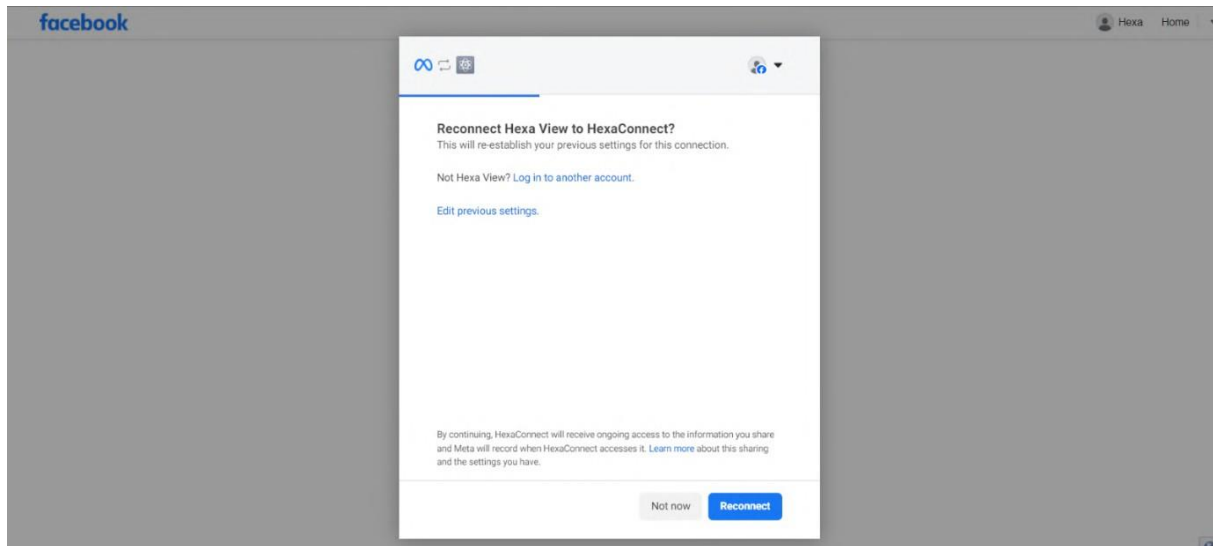
HexaConnect

You don't have any related named credentials.

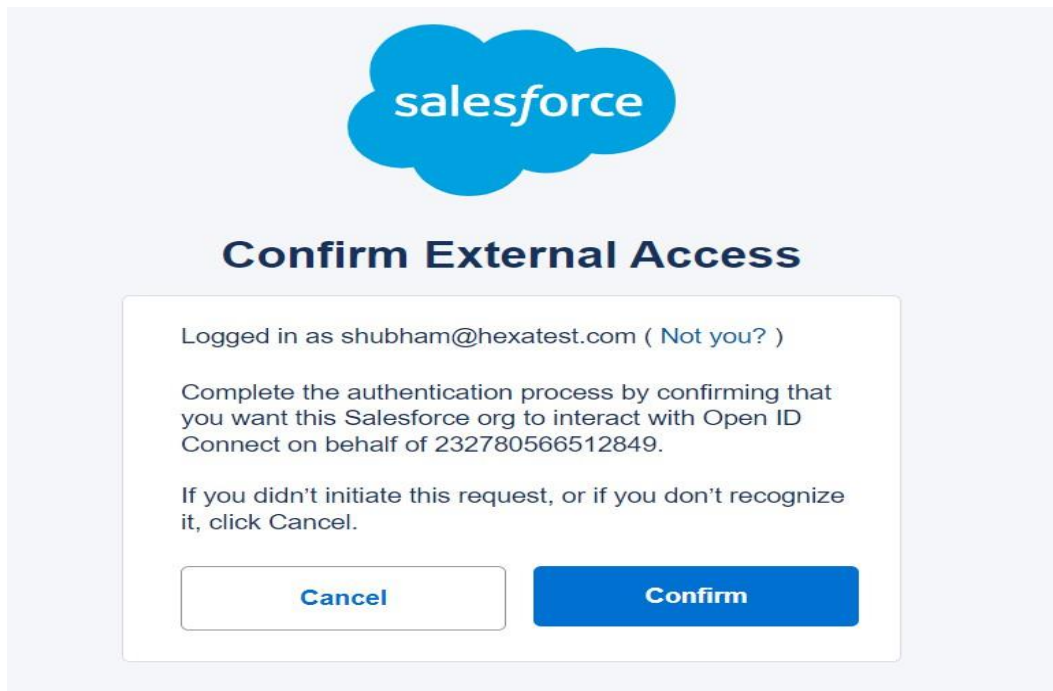
Principals

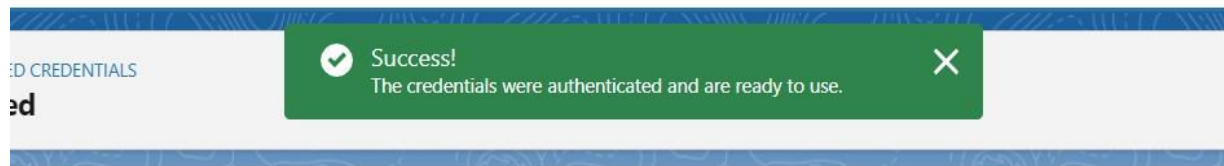
Seque...	Parameter Name	Identity Type	Sc...	Authentication Status	
1	AuthenticateGraphCred	Named Principal		Not Configured	Edit Delete Authenticate

- 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'.

Profile
HexaConnectTest Profile

Find Settings... | Edit Properties

Profile Overview Assigned Users

Description
User License: Guest User License
Created By: Nandini bhatt , 21/02/2024, 10:49 am

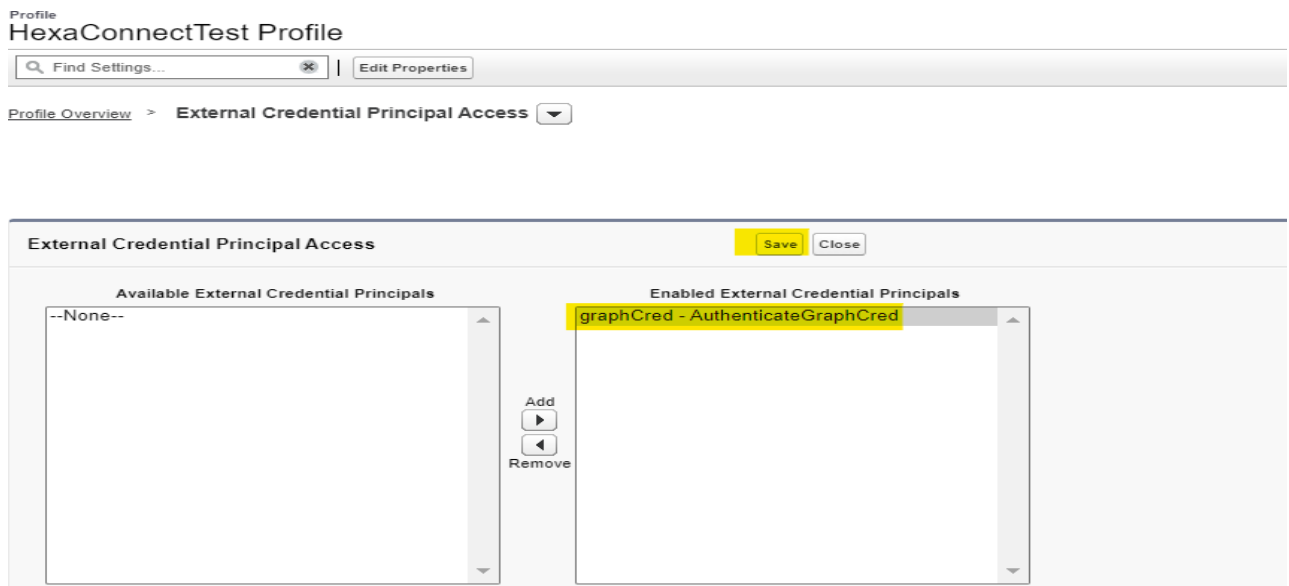
Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages
- External Data Source Access**
Permissions to authenticate against external data sources
- Named Credential Access**
Permissions to authenticate against named credentials
- External Credential Principal Access**
Permissions to authenticate with external credential principal mappings

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

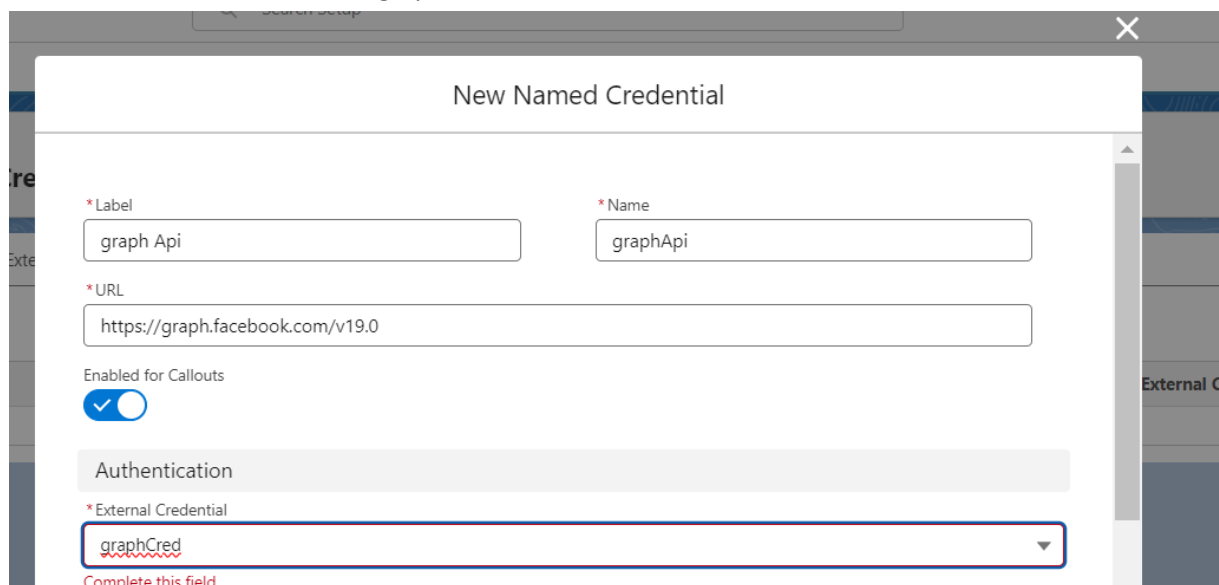
HexaConnect



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.

The screenshot shows the 'New Named Credential' dialog box. The 'Name' field is set to 'graphCred'. Below it is a 'Client Certificate' search bar. The 'Callout Options' section includes three checked checkboxes: 'Generate Authorization Header', 'Allow Formulas in HTTP Header', and 'Allow Formulas in HTTP Body'. The 'Outbound Network Connection' dropdown is set to '--None--'. The 'Managed Package Access' section has a text field for 'Allowed Namespaces for Callouts' containing 'HexaConnect'. At the bottom right are 'Cancel' and 'Save' buttons.

- 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'

New Named Credential

* Label: graphApiOauth

* Name: graphApiOauth

* URL: https://graph.facebook.com/v19.0

Enabled for Callouts: ☒

Authentication

* External Credential: graphCred

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

Edit graphApiOauth

External Credential: graphCred

Client Certificate: Search Certificates...

Callout Options

Generate Authorization Header: ☐

Allow Formulas in HTTP Header: ☒

Allow Formulas in HTTP Body: ☐

Outbound Network Connection: Select an Option

Managed Package Access

Allowed Namespaces for Callouts: HexaConnect

Cancel Save

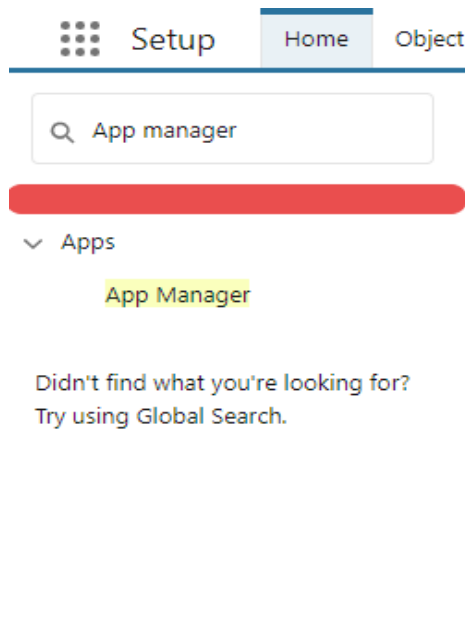
- Finally, click on 'Save'.

2.3.4 Connected App Setup:

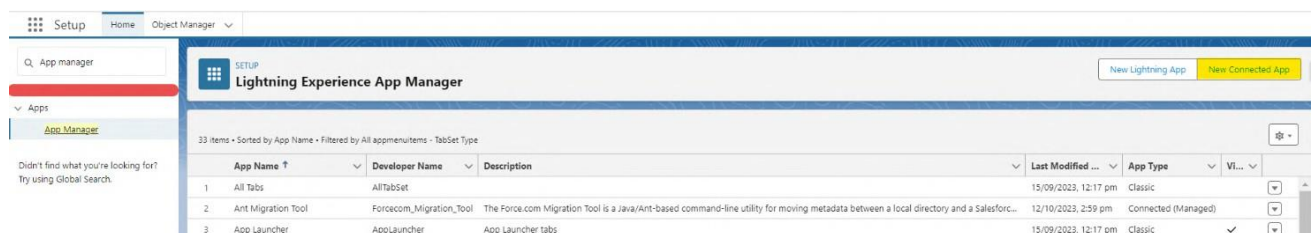
2.3.4.1 Creating a Connected App:

HexaConnect

- 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.

HexaConnect

SETUP

App Manager

SaveCancel

Basic Information

Connected App Name

HexaConnectApp

API Name

HexaConnectApp

Contact Email

hexaconnect@gmail.com

Contact Phone

Logo Image URL

Upload logo image or Choose one of our sample logos

Icon URL

Choose one of our sample logos

Info URL

Description

API (Enable OAuth Settings)

Enable OAuth Settings

☒

Enable for Device Flow

☒

Callback URL

http://login.salesforce.com

Use digital signatures

☐

Selected OAuth Scopes

Available OAuth Scopes

Access the identity only service (id, profile, email, address, phone)
Access unique user identifiers (openid)
Manage Data Cloud Calculated Insight data (cdp_calculated_insight_api)
Manage Data Cloud Identity Resolution (cdp_identityresolution_api)
Manage Data Cloud Ingestion API data (cdp_ingest_api)
Manage Data Cloud profile data (cdp_profile_api)
Manage Pardot services (pardot_api)
Manage user data via APIs (api)
Manage user data via Web browsers (web)
Perform ANSI SQL queries on Data Cloud data (cdp_query_api)

AddRemove

Selected OAuth Scopes

Full access (full)
Perform requests at any time (refresh_token, offline_access)

Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows

☒

Require Secret for Web Server Flow

☒

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

- Click on Continue.

Connected App Name
HexaConnectApp

Changes can take up to 10 minutes to take effect. Deleting a parent org also deletes all connected apps with OAuth settings enabled.

ContinueCancel

- 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.

[« Back to Manage Connected Apps](#)

Consumer Details

Consumer Key

Copy

Consumer Secret

Copy

Staged Consumer Details

Generate staged values for the consumer key and secret. When you apply the staged values, they replace the original consumer details.

Staged Consumer Key	Not generated
Staged Consumer Secret	Not generated

GenerateApplyCancel

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.

Auth. Provider

Auth. Provider Edit

SaveSave & NewCancel

Provider TypeSalesforce

NameSalesforce Auth Provider

URL SuffixSalesforce_Auth_Provider

Consumer Key

Consumer Secret

Authorize Endpoint URLhttps://login.salesforce.com/services/oauth2/authorize

Token Endpoint URLhttps://login.salesforce.com/services/oauth2/token

Use Proof Key for Code Exchange (PKCE) Extension☒

Default Scopesrefresh_token full

Include Consumer Secret in SOAP API Responses☒

Custom Error URL

Custom Logout URL

Registration Handler

Automatically create a registration handler template

Execute Registration As

Portal--None--

Icon URL

Choose one of our sample icons

Use Salesforce MFA for this SSO Provider☐

SaveSave & NewCancel

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

SETUP Auth. Providers

Auth. Provider

Auth. Provider Detail Edit Delete Clone

Auth. Provider ID	[REDACTED]
Provider Type	Salesforce
Name	Salesforce Auth Provider
URL Suffix	Salesforce_Auth_Provider
Consumer Key	[REDACTED]
Consumer Secret	Click to reveal
Authorize Endpoint URL	https://login.salesforce.com/services/oauth2/authorize
Token Endpoint URL	https://login.salesforce.com/services/oauth2/token
Use Proof Key for Code Exchange (PKCE) Extension	☒
Default Scopes	refresh_token full
Include Consumer Secret in SOAP API Responses	☒
Custom Error URL	
Custom Logout URL	
Registration Handler	
Execute Registration As	
Portal	
Icon URL	
Use Salesforce MFA for this SSO Provider	☐

Salesforce Configuration

Test-Only Initialization URL	[REDACTED]
Existing User Linking URL	[REDACTED]
OAuth-Only Initialization URL	[REDACTED]
Callback URL	[REDACTED]
Single Logout URL	[REDACTED]

► Experience Cloud Sites Edit Delete Clone

- 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.

SETUP Manage Connected Apps

▼ API (Enable OAuth Settings)

Enable OAuth Settings	☒
Enable for Device Flow	☒
Callback URL	[REDACTED]
Use digital signatures	☐
Selected OAuth Scopes	Available OAuth Scopes - Access Analytics REST API Charts Geodata resources (eclair_api) - Access Analytics REST API resources (wave_api) - Access Connect REST API resources (chatter_api) - Access Einstein GPT services (einstein_gpt_api) - Access Headless Forgot Password API (forgot_password) - Access Headless Passwordless Login API (pwdless_login_api) - Access Headless Registration API (user_registration_api) - Access Interaction API resources (interaction_api) - Access Lightning applications (lightning) - Access Visualforce applications (visualforce) Add Remove Selected OAuth Scopes - Full access (full) - Perform requests at any time (refresh_token, offline_access)
Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows	☒
Require Secret for Web Server Flow	☒
Require Secret for Refresh Token Flow	☐
Enable Client Credentials Flow	☐

- 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'.

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www.hexaviewtech.com

HexaConnect

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

SETUP

 **Named Credentials**

Named Credentials

External Credentials

2 Items - Sorted by Label

Label	Type	URL	External Credential
			New 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.

Salesforce Configuration	
Test-Only Initialization URL	https://[redacted]services/oauth2/authorize?response_type=code
Existing User Linking URL	https://[redacted]services/oauth2/authorize?response_type=code
OAuth-Only Initialization URL	https://[redacted]services/oauth2/authorize?response_type=code
Callback URL	https://[redacted].com/services/oauth2/callback
Single Logout URL	https://[redacted]services/logout

- 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.

SETUP

Named Credentials

New Named Credential

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

Save

Cancel

Label ⓘ

CallMeBack

Name ⓘ

CallMeBack

URL

http://[redacted].com

▼ Authentication

Certificate

Identity Type

Named Principal ▼

Authentication Protocol

OAuth 2.0 ▼

Authentication Provider

Salesforce Auth Provider

Scope

Authentication Status

Pending

Start Authentication Flow on Save

☒

▼ Callout Options

Generate Authorization Header ⓘ

☒

Allow Merge Fields in HTTP Header ⓘ

☒

Allow Merge Fields in HTTP Body ⓘ

☐

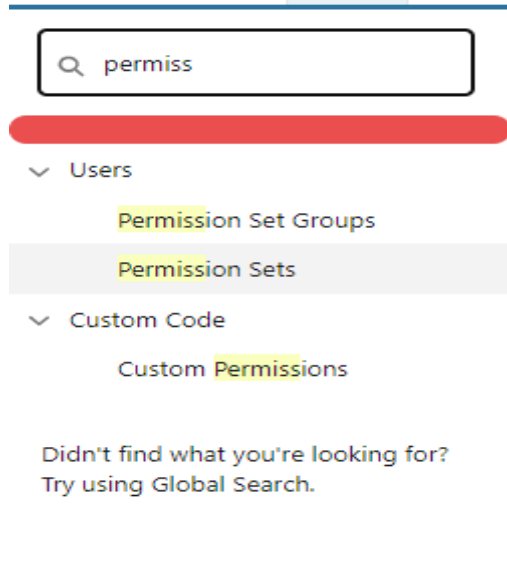
Outbound Network Connection ⓘ

Save

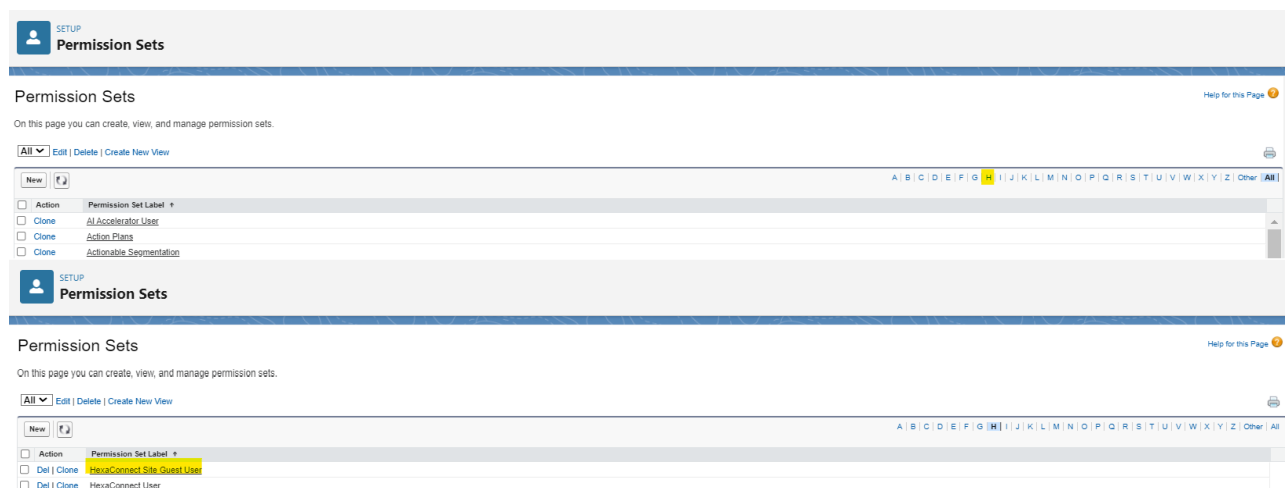
Cancel

2.3.5 Permission Set Assignment:

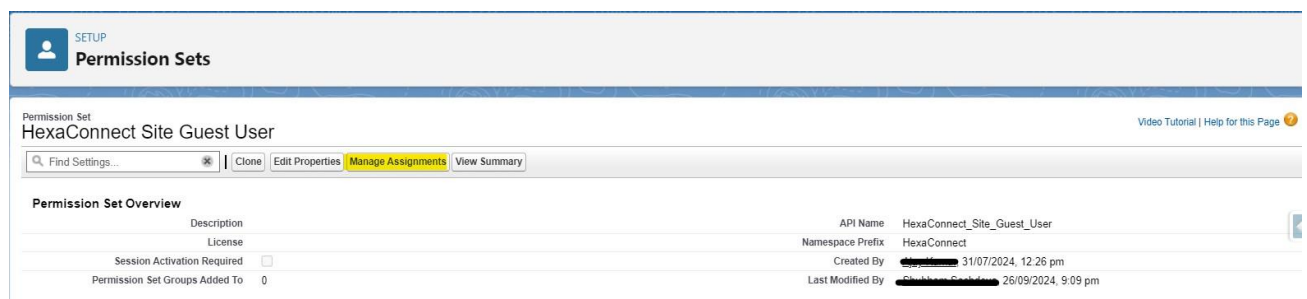
- In the quick find box type 'permission' and under Users click on 'Permission Sets'.



- 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

... > SETUP > PERMISSION SET 'HEXACONNECT USER'

HexaConnect User

Current Assignments

[Add Assignment](#)

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

... > PERMISSION SET 'HEXACONNECT SITE GUEST USER' > MANAGE ASSIGNMENT EXPIRATION

HexaConnect Site Guest User

Select Users to Assign

Active Users ▼

1 item selected

Search this list...

☐	Full Name ↑	Alias	Username	Role	Active	Profile
☐	[Redacted]	NBhat	[Redacted]		☒	System Administrator
☐	[Redacted]	rkaus	[Redacted]		☒	System Administrator
☐	[Redacted]	ssing	[Redacted]		☒	System Administrator
☐	[Redacted]	SUser	[Redacted]		☒	Custom: Sales Profile
☐	[Redacted]	ssach	[Redacted]		☒	System Administrator
☐	[Redacted]	SUser	[Redacted]		☒	Custom: Support Profile
☐	[Redacted]	tsupp	[Redacted]		☒	Custom: Support Profile
☒	whatsapp Site Guest User	guest	whatsapp@00d5i00000dzvtheav.org.force.com		☒	whatsapp Profile

[Cancel](#) [Next](#)

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

Select an Expiration Option For Assigned Users

☒ No expiration date ⓘ

☐ Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone

Select a time zone...

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

HexaConnect

Select an Expiration Option For Assigned Users

☒ No expiration date ⓘ

☐ Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

ⓘ Time Zone

Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
whatsapp Site Guest User		whatsapp Profile	✓	Guest User License	Never Expires

Cancel

Back

Assign

- 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.

🔍 shari

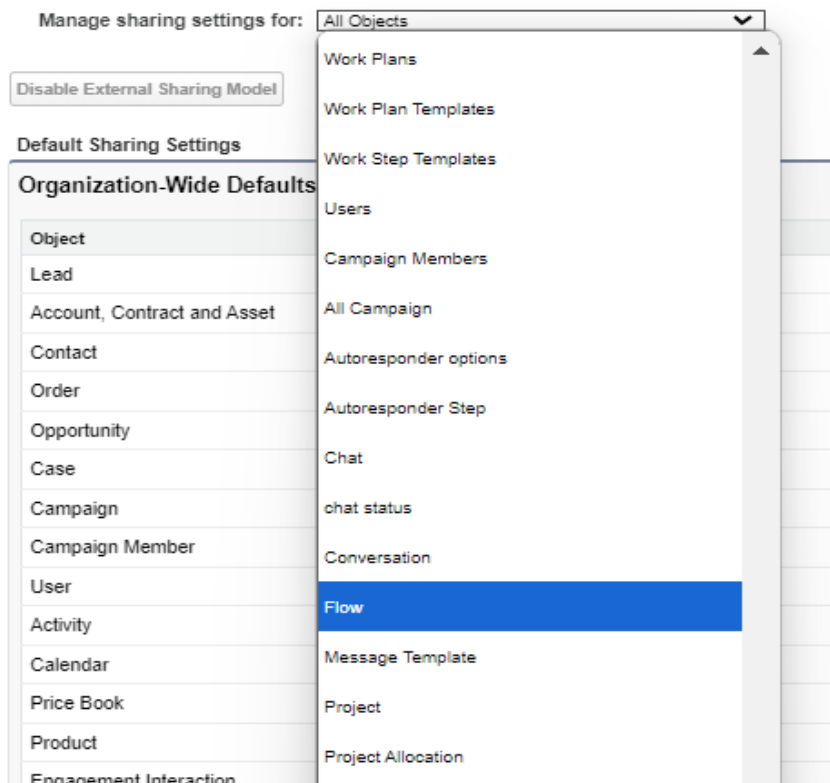
▼ Security

Guest User Sharing Rule Access

Report

Sharing Settings

- Click on the dropdown and select 'Flow'.



- Under Sharing Rules Click on 'New'.

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change

Manage sharing settings for: Flow

[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults [Edit](#)

Object	Default Internal Access	Default External Access
Flow	Public Read/Write	Private

Other Settings

Manager Groups ☐ [i](#)

Minimize the number of roles created, which improves performance by cutting down processing loads ☒ [i](#)

Grant site users access to related cases ☒ [i](#)

Secure guest user record access ☒ [i](#)

Require permission to view record names in lookup fields ☐ [i](#)

Sharing Rules

Flow Sharing Rules [New](#) [Recalculate](#)

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

HexaConnect

Setup

Flow Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Label	share flow
Rule Name	share_flow
Description	

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

Step 2: Select your rule type

Rule Type ☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria

- Under step 3, select 'Status equals True'

Step 3: Select which records to be shared



This sharing rule grants access to guest users without login credentials. By modifying the default settings without logging in. To secure your site and its data from guest users, consider all the use cases and implicit data to guest users related to this change from default settings.

Criteria	Field	Operator	Value	
	Status	equals	True	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

[Add Filter Logic...](#)

Additional Options ☐ Include records owned by high-volume users

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

Step 4: Select the users to share with

Share with

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

Step 5: Select the level of access for the users

Access Level

Return to the 'Sharing Settings' homepage.

- Select 'Message Template' from the dropdown

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Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of

Manage sharing settings for: **All Objects**

[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults

Object	Sharing Settings
Lead	
Account, Contract and Asset	
Contact	
Order	
Opportunity	
Case	
Campaign	
Campaign Member	
User	
Activity	
Calendar	
Price Book	
Product	
Engagement Interaction	

Work Plans
Work Plan Templates
Work Step Templates
Users
Campaign Members
All Campaign
Autoresponder options
Autoresponder Step
Chat
chat status
Conversation
Flow
Message Template
Project
Project Allocation

- Under Sharing Rules Click on 'New'.

Sharing Rules

Message Template Sharing Rules

[New](#) [Recalculate](#)

- 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'.

Step 1: Select your rule type

 This sharing rule grants access to guest users without login credentials. By modifying the default accessing the site, even without logging in. To secure your site and its data from guest users, con Salesforce isn't responsible for any exposure of your data to guest users related to this change fr

Criteria	Field	Operator	Value	
	Owner ID	not equal to		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		

[Add Filter Logic...](#)

Additional Options ☐ Include records owned by users who can't have an assigned role [i](#)

- 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.

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of

Manage sharing settings for: All Objects

Default Sharing Settings

Organization-Wide Defaults

Object
Lead
Account, Contract and Asset
Contact
Order
Opportunity
Case
Campaign
Campaign Member
User
Activity
Calendar

Work Plans

Work Plan Templates

Work Step Templates

Users

Campaign Members

All Campaign

Autoresponder options

Autoresponder Step

Chat

chat status

Conversation

Flow

Message Template

- Under Sharing Rules Click on 'New'.

Sharing Rules

Conversation Sharing Rules

- 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'.

Step 3: Select which records to be shared



This sharing rule grants access to guest users without login credentials. By modifying the default settings without logging in. To secure your site and its data from guest users, consider all the use cases and impli data to guest users related to this change from default settings.

Criteria	Field	Operator	Value	
	Conversation Id Name	not equal to		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

[Add Filter Logic...](#)

追加オプション ☐ Include records owned by high-volume users

- 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.

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- Select 'Chat' from the dropdown.

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level

Manage sharing settings for: All Objects

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults

Object
Lead
Account, Contract and Asset
Contact
Order
Opportunity
Case
Campaign
Campaign Member
User
Activity
Calendar
Price Book
Product

User Provisioning Requests

Visits

Web Cart Documents

Work Orders

Work Plans

Work Plan Templates

Work Step Templates

Users

Campaign Members

All Campaign

Autoresponder options

Autoresponder Step

Chat

chat status

- Under Sharing Rules Click on 'New'.

Sharing Rules

Chat Sharing Rules

New Recalculate

- 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'.

Step 3: Select which records to be shared

Criteria	Field	Operator	Value	
	chatID	not equal to		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

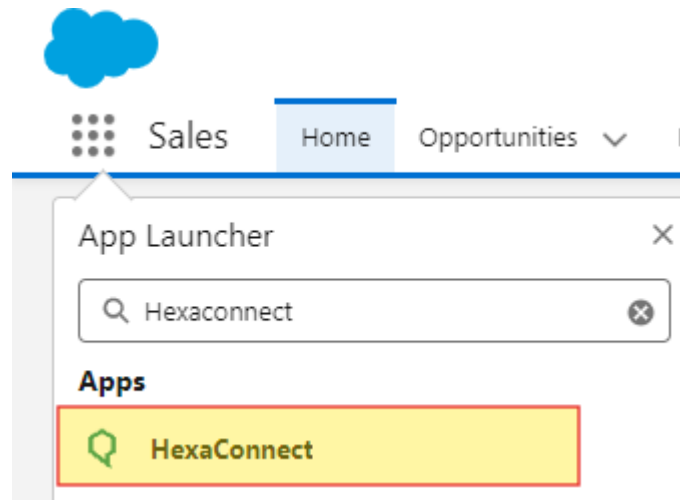
[Add Filter Logic...](#)

Additional Options ☒ Include records owned by users who can't have an assigned role ⓘ

- 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.

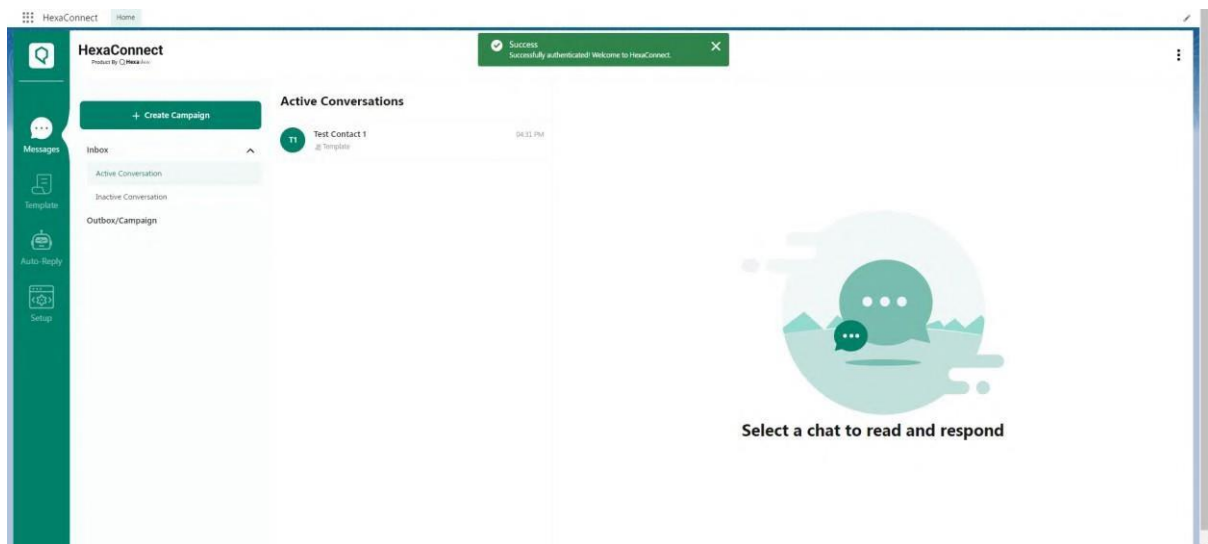


- The user will be redirected to the setup page and asked to enter the following information:
 - Business Account Information
 - App ID
 - App Secret
 - Salesforce Public Site URL: Create a Site.com site in Salesforce and provide access to the
 - Phone Number ID
 - WhatsApp Business Account
- All the 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

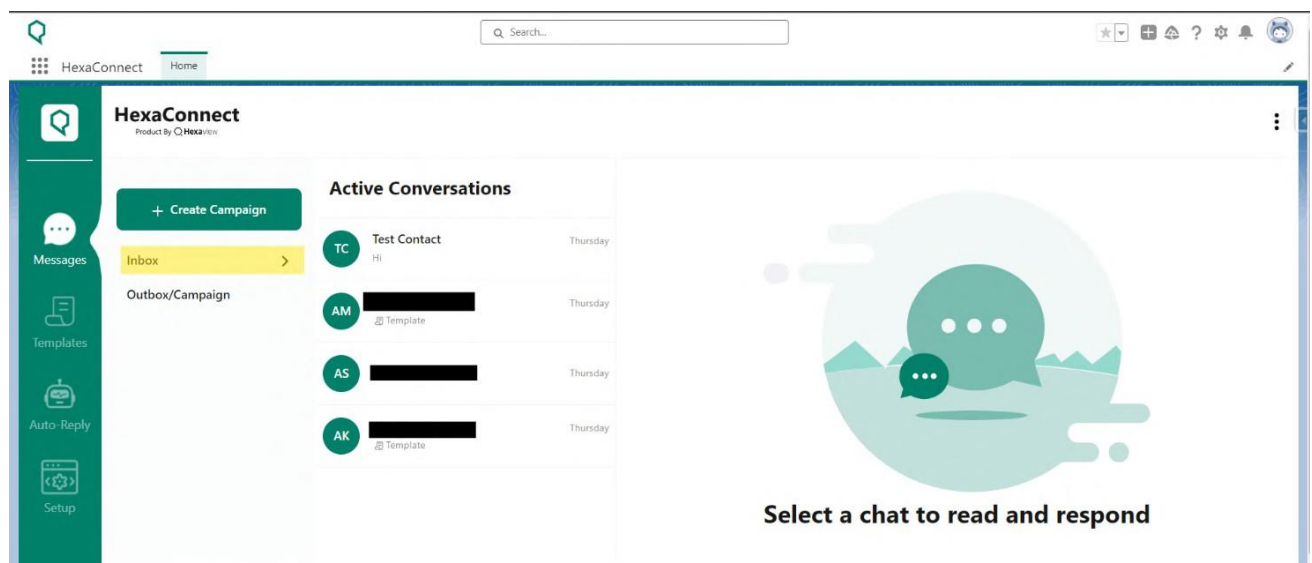
4.1 Direct Messaging

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.

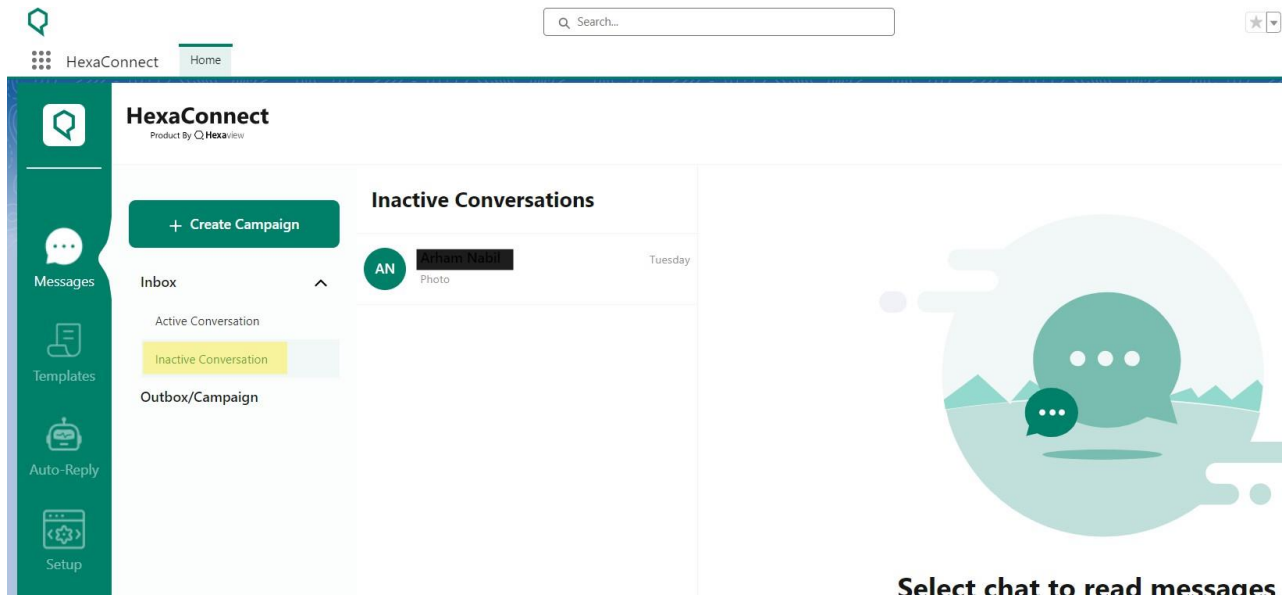
Steps for messaging (For inactive conversations):



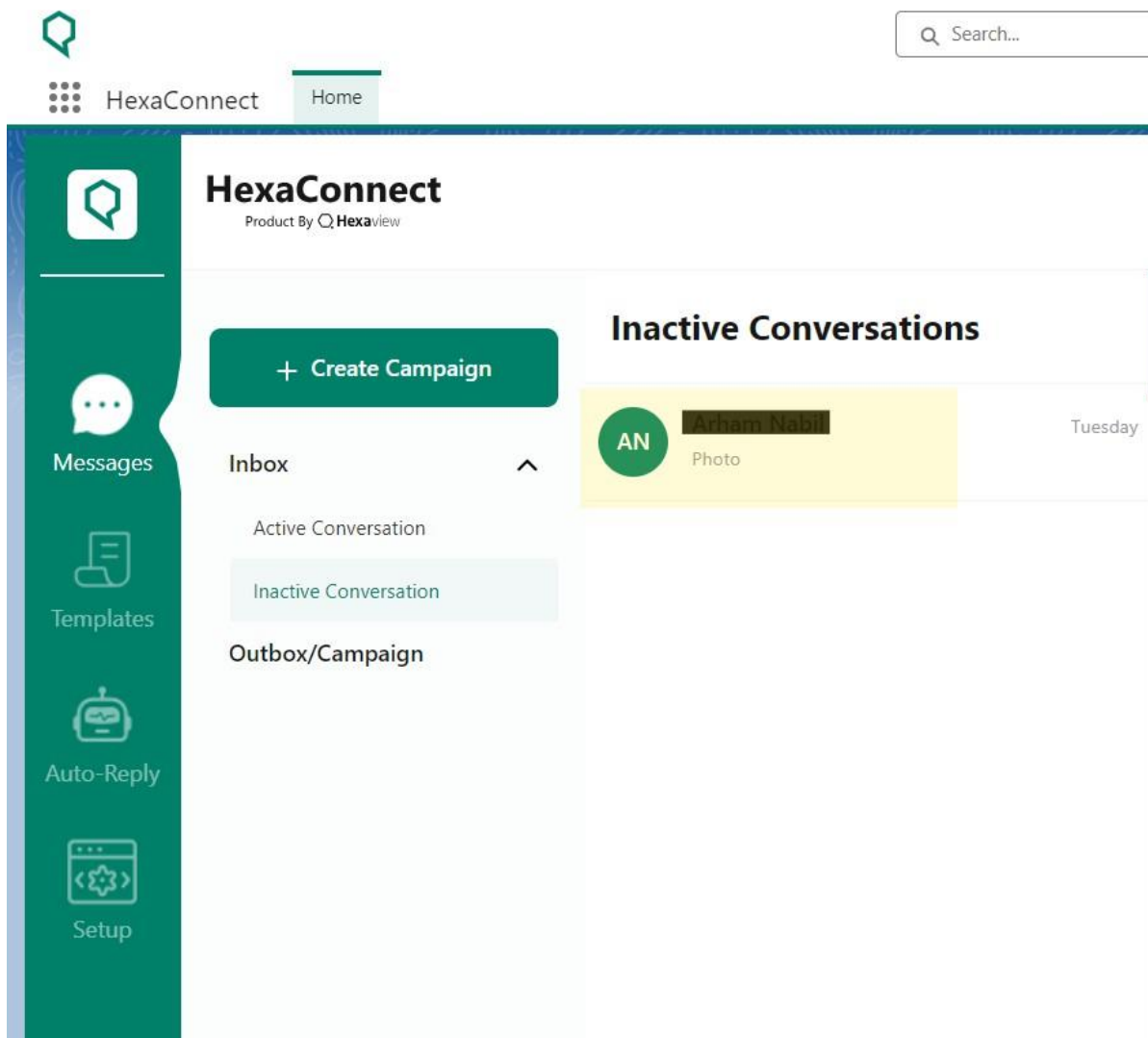
Step 1: Click on Messages from the Menu bar. The messaging tab will open and give two options: Inbox and Outbox/Campaigns.

HexaConnect

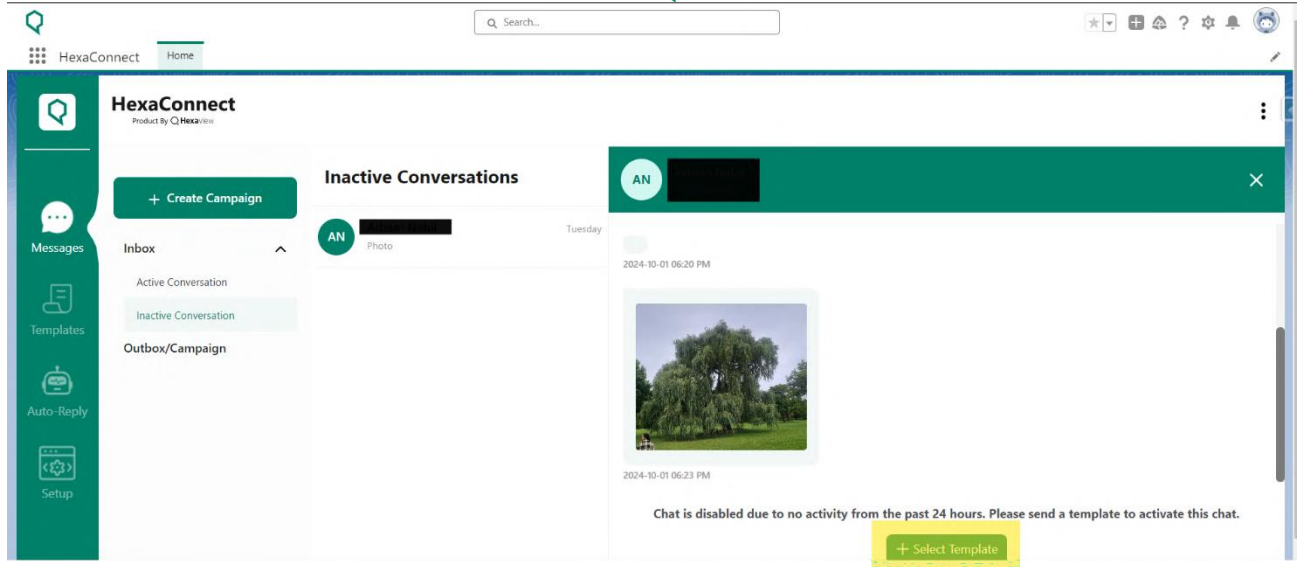
Step 2: Click on Inactive Conversations



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

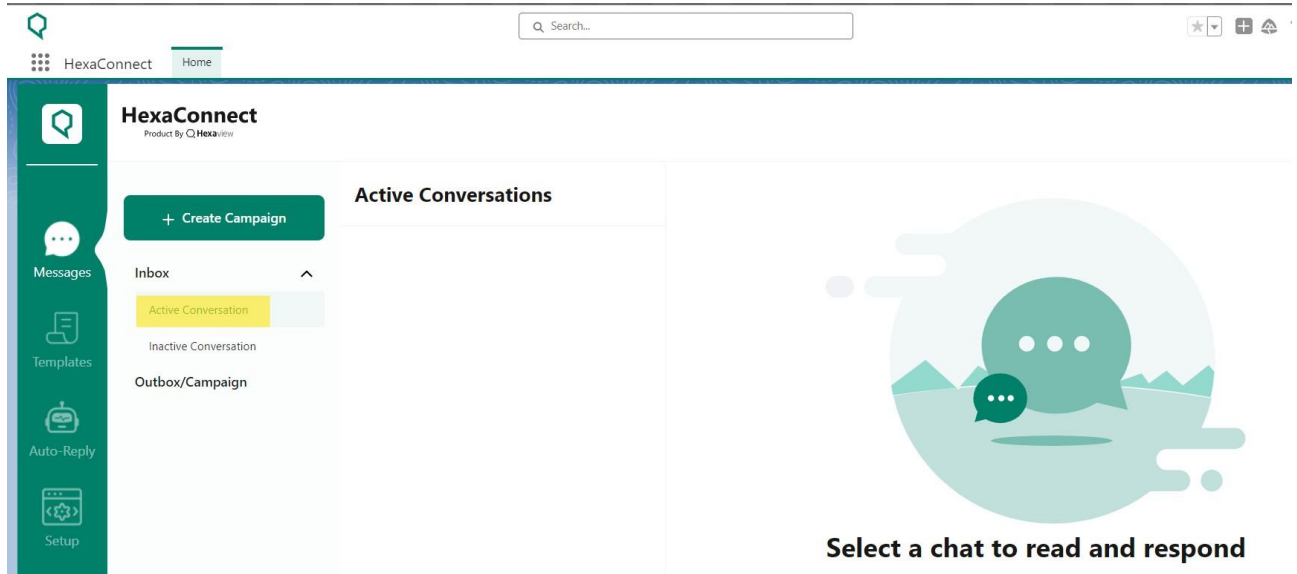


Step 4: Select the pre-approved template you want to send to the record and click send.



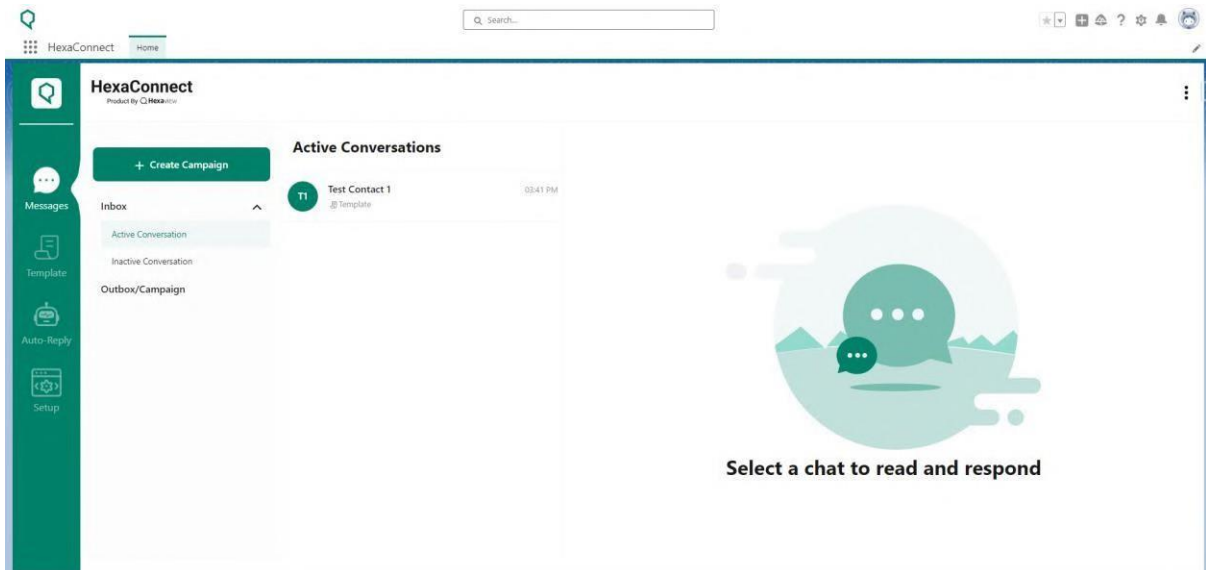
HexaConnect

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



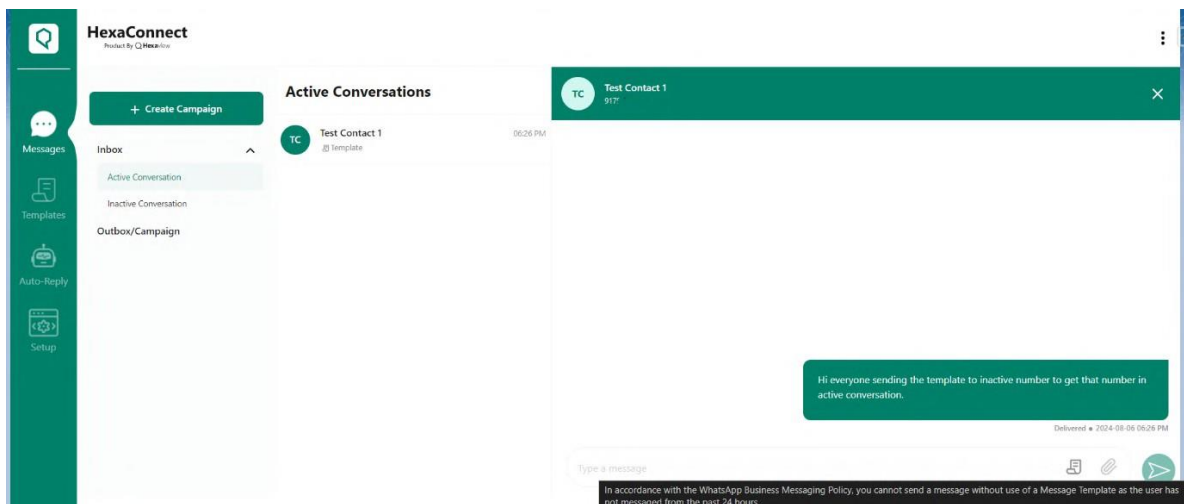
Step 5: The conversation will move to HexaConnect's conversation window. You can either continue the conversation using the template or wait for the user's response to send messages without using the template.

HexaConnect



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.

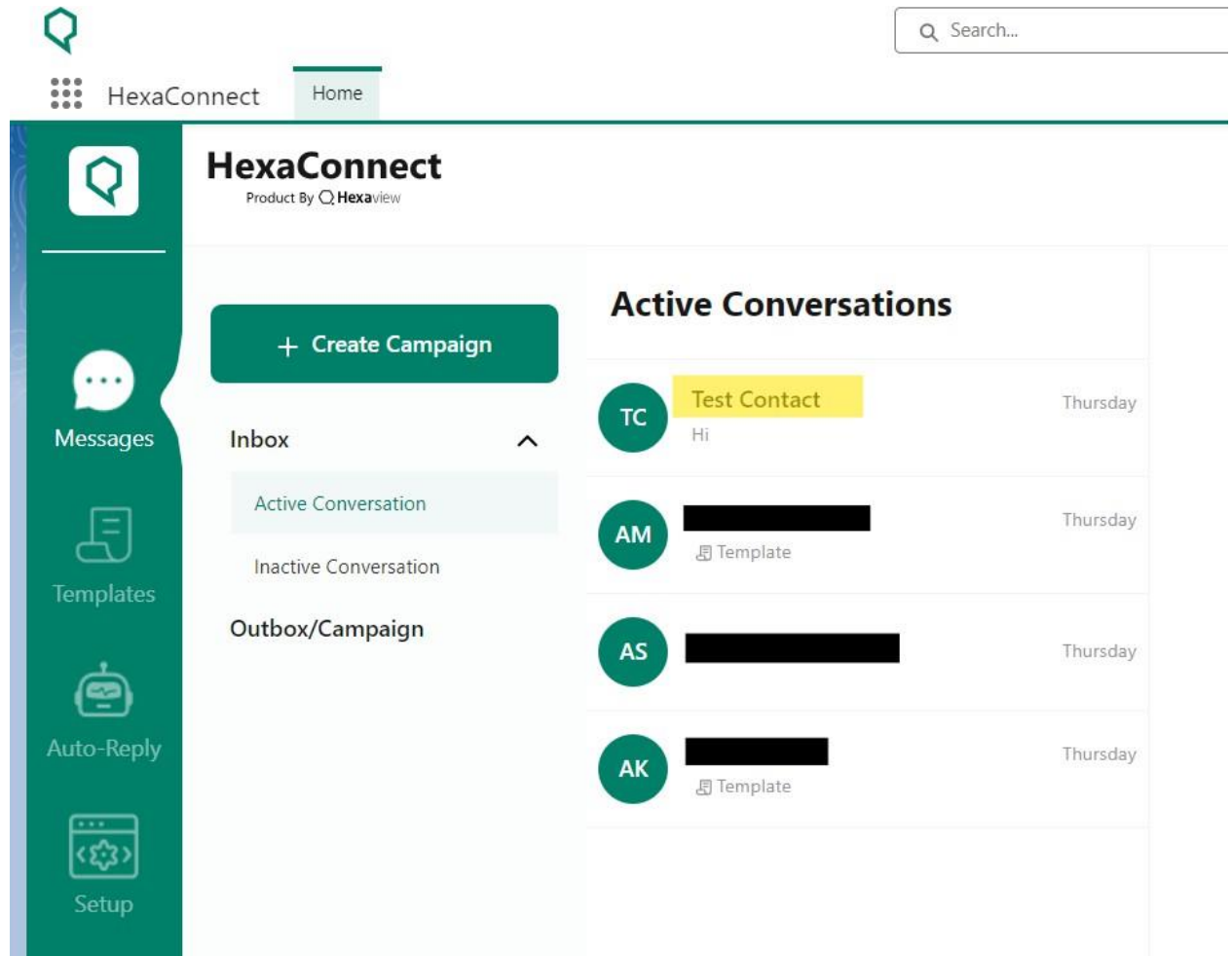


HexaConnect

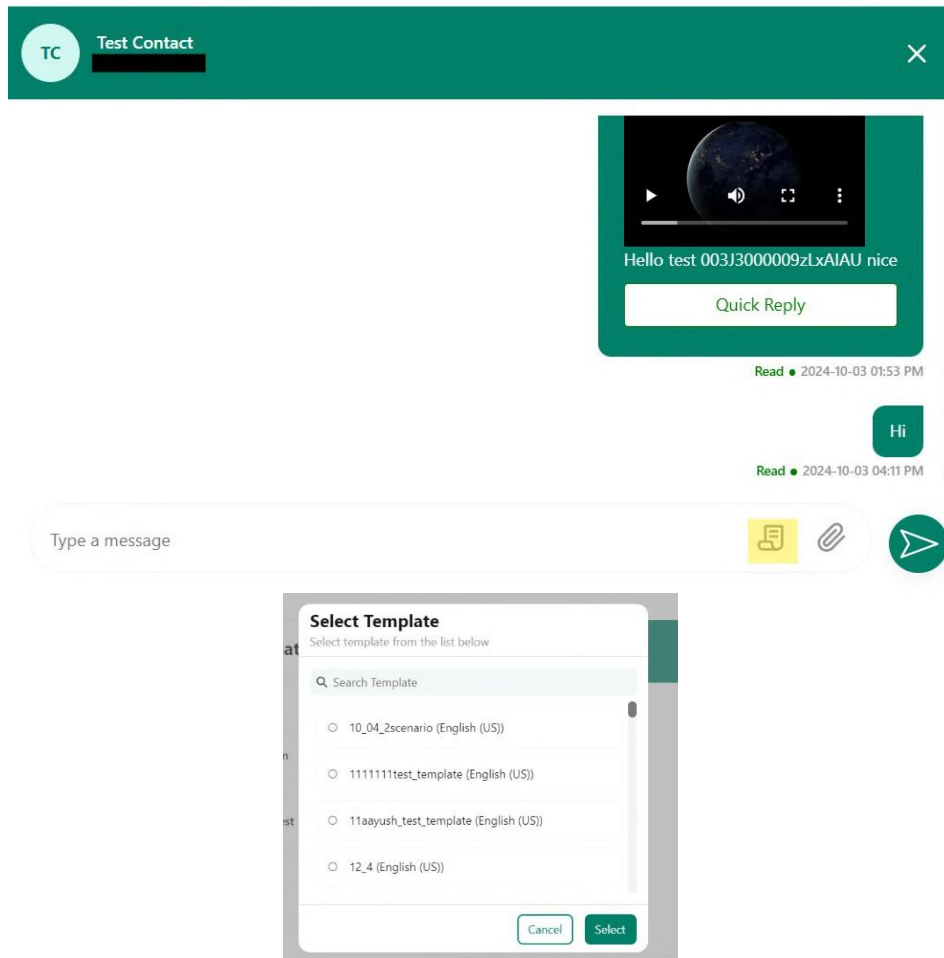
Steps for messaging (For active conversations):

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

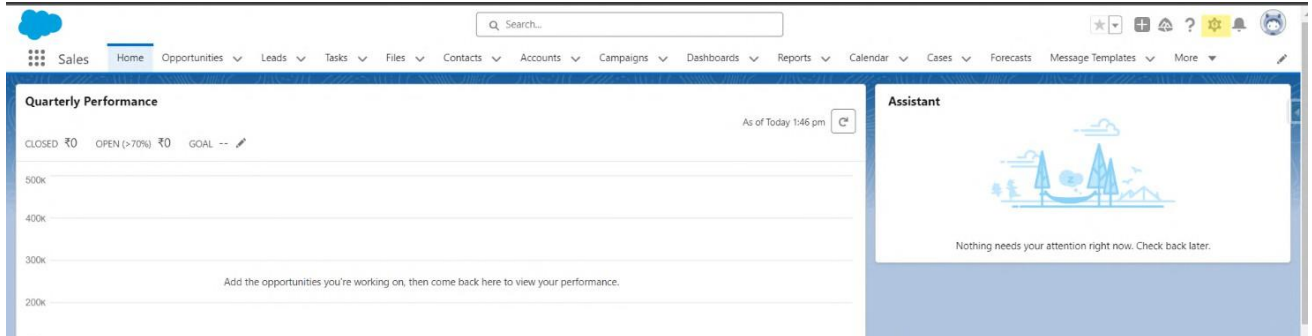
When using the Sales App, users have the option to initiate conversations with leads, contacts, cases, or opportunities by accessing the respective record pages and clicking on the utility chat

HexaConnect

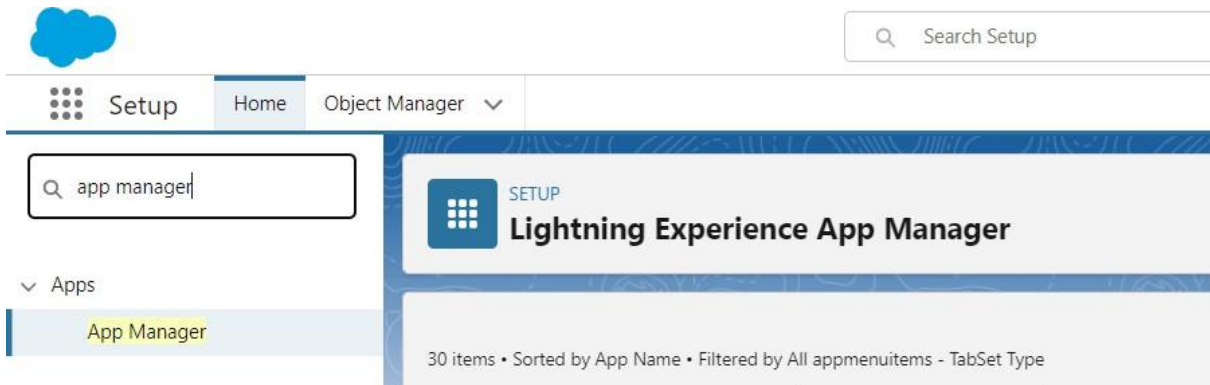
located at the bottom left. By doing so, a floating chat window will appear, enabling the user to send WhatsApp messages or templates directly from the record page.

Steps to enable Utility Chat for your Org:

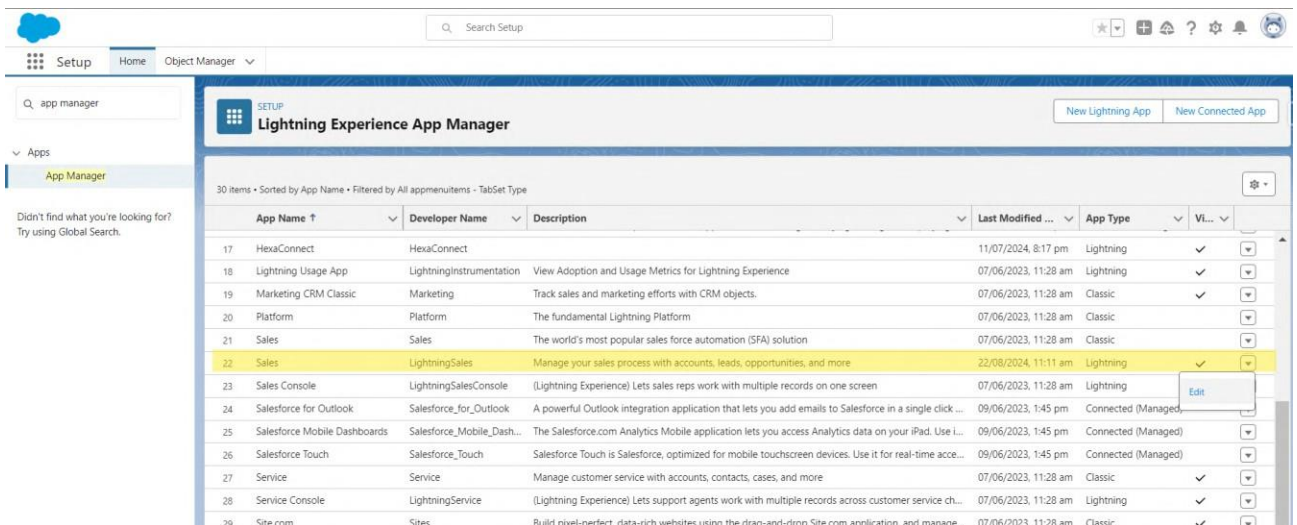
1. Open "Setup" by clicking on the Salesforce "Gear icon" & then on "Setup".



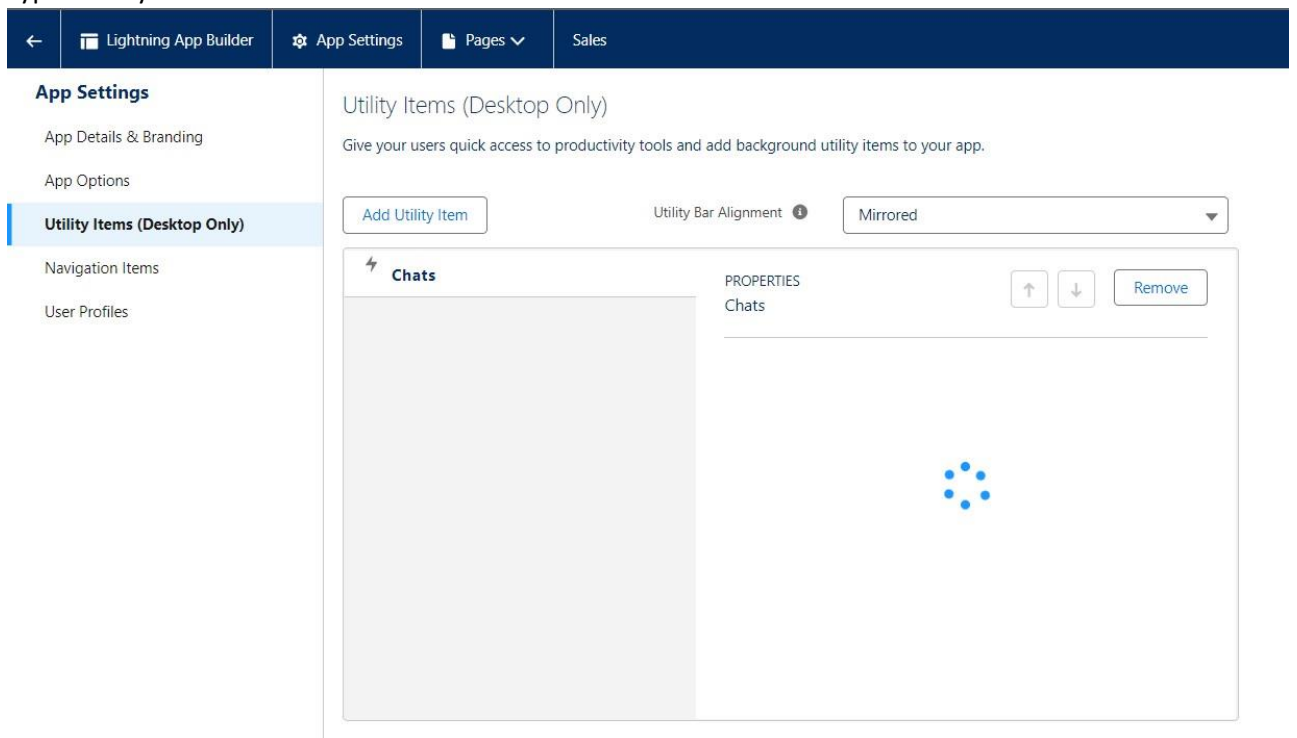
2. Search "App Manager" in the "Quick Find" box & click on it.



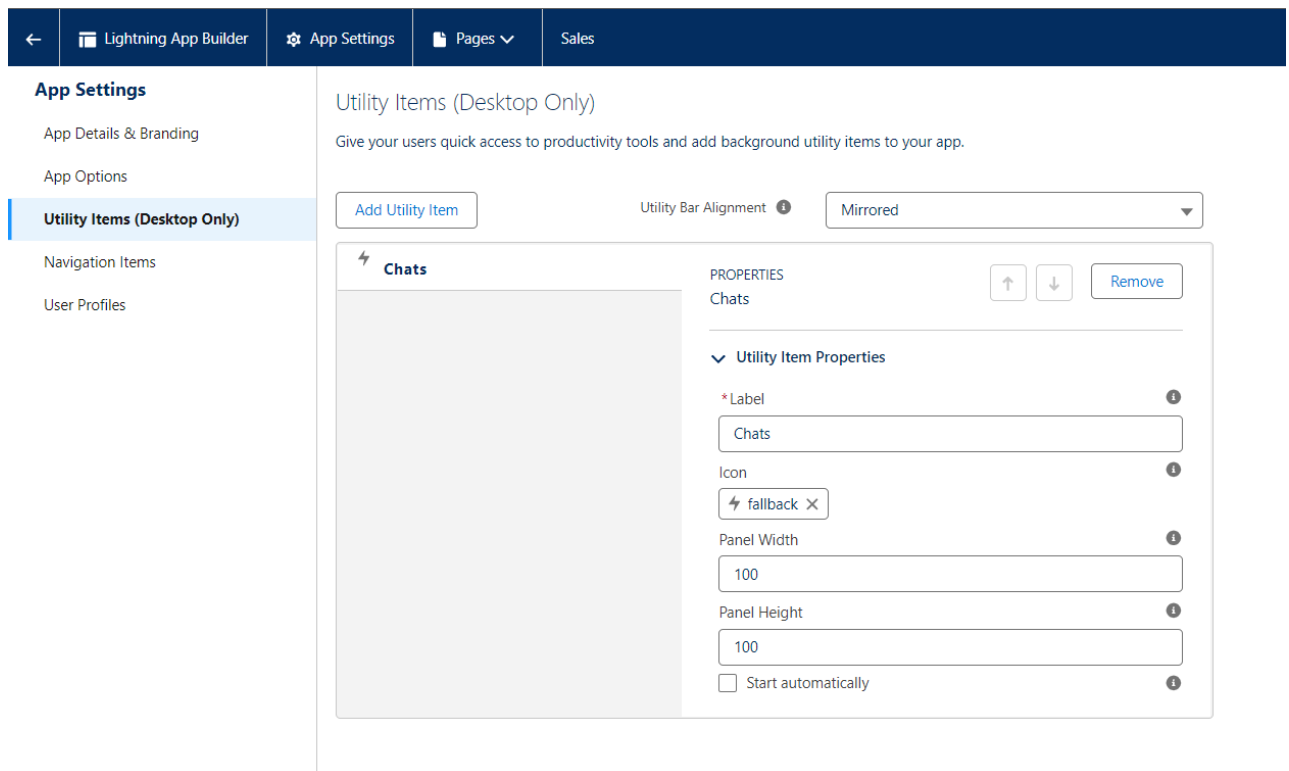
3. Edit the "Sales" app (LightningSales) by clicking on the dropdown icon & then on "Edit".



- 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.

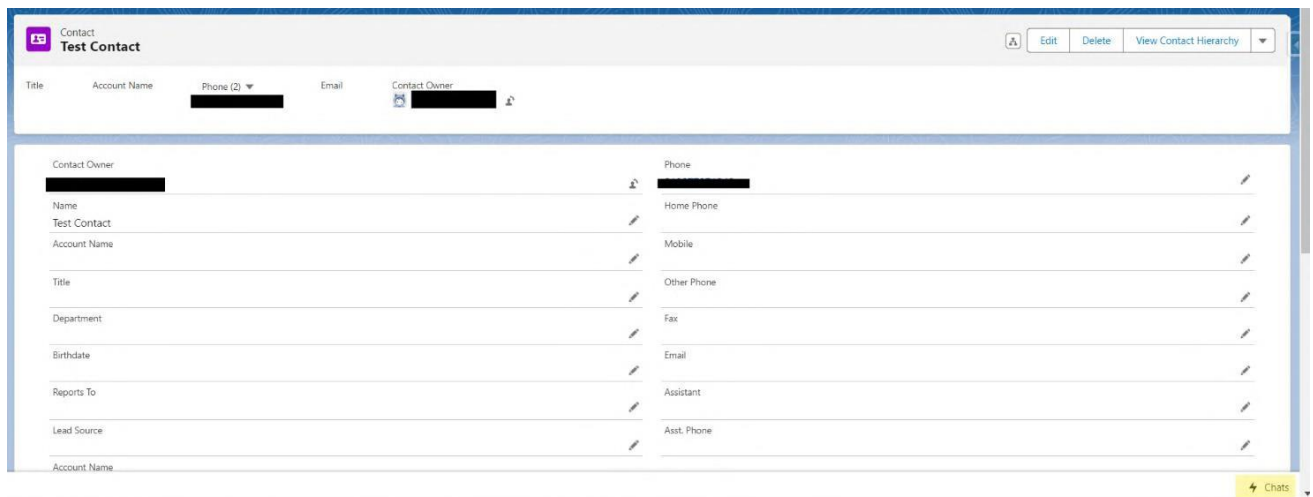


- Populate the "Label" field with the name you want to give to this chat window. In the below example, we have labelled it as "Chat".
- Click on Utility Bar Alignment and select "Mirrored".
- Select the Panel Width and Panel Height to 150 and 100 respectively.



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.

HexaConnect

Contacts
Recently Viewed ▾ 

2 items • Updated a few seconds ago

	☐ Name ▾	☐ Account Name ▾	☐ Account Name ▾
1	☐ Test Contact		
2	☐ [REDACTED]		[REDACTED]

Contact
Test Contact

 [Edit](#) [Delete](#) [View Contact Hierarchy](#) ▾

Title Account Name Phone (2) ▾ Email Contact Owner  [REDACTED]

Contact Owner	[REDACTED]	Phone	[REDACTED]
Name	Test Contact	Home Phone	
Account Name		Mobile	
Title		Other Phone	
Department		Fax	
Birthdate		Email	
Reports To		Assistant	
Lead Source		Asst. Phone	
Account Name			

 [Chats](#)

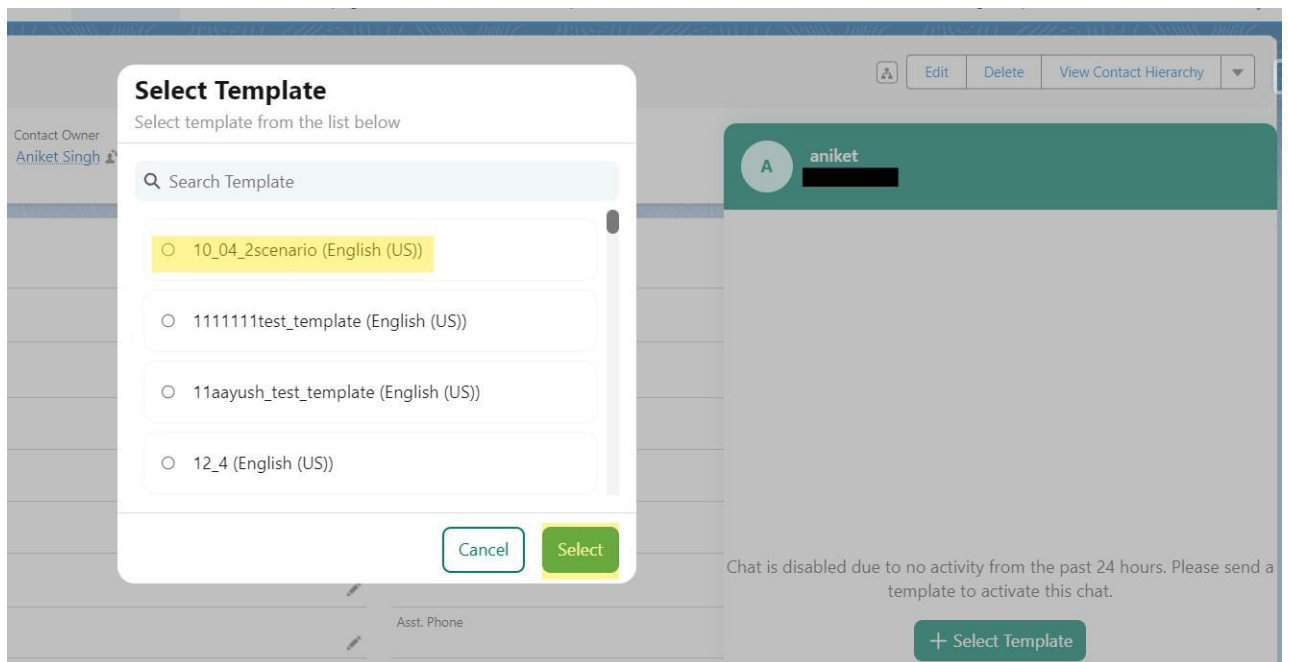
Step 2: Click on the Utility chat bar at the bottom right of the page.

Chat is disabled due to no activity from the past 24 hours. Please send a template to activate this chat.

[+ Select Template](#)

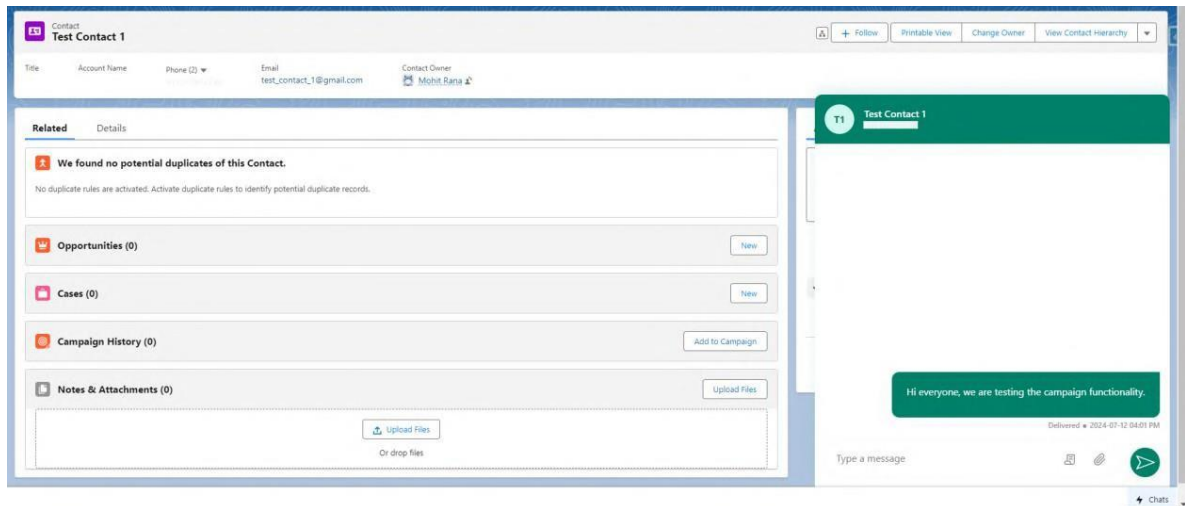
Step 3: A chat window will appear with the option to select a template (if the conversation is inactive).

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



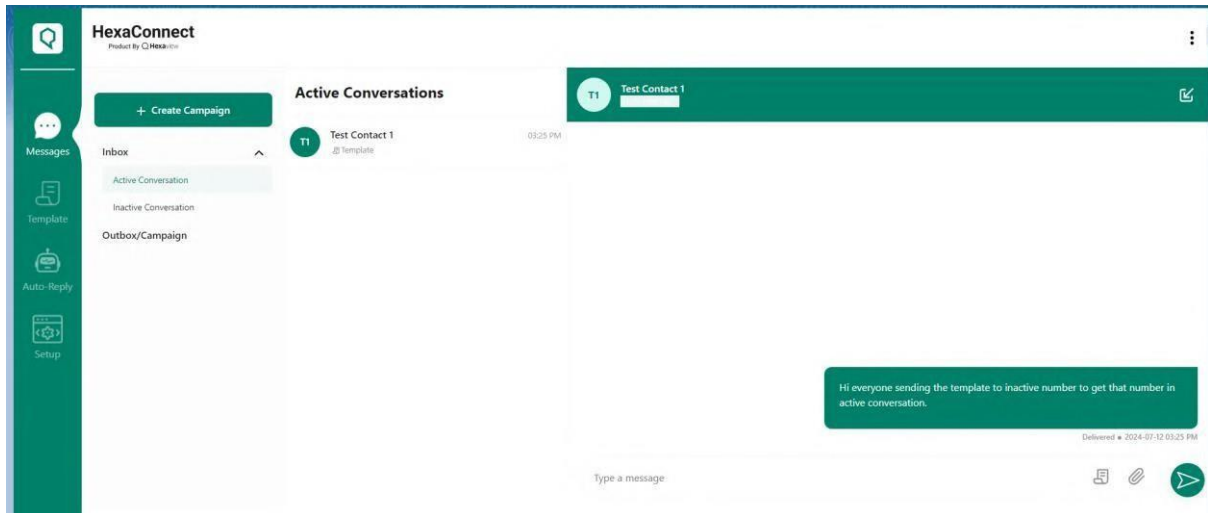


Step 5: The template will be sent, and the conversation will become active.



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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.

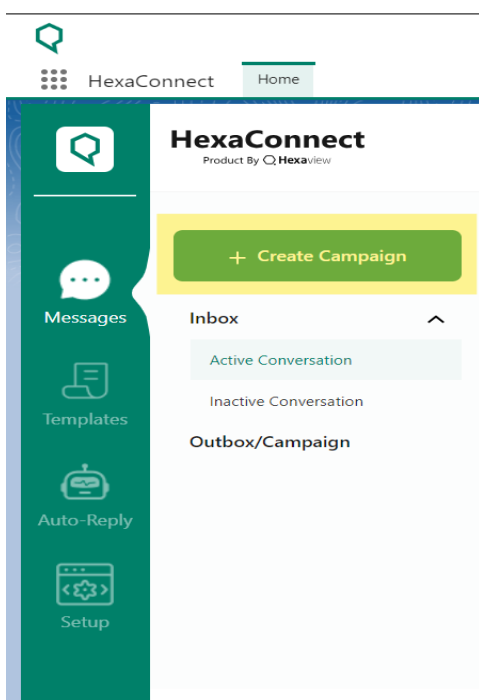


4.3 Bulk Messaging

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.

The screenshot shows the HexaConnect interface with a sidebar on the left containing icons for Messages, Template, Auto-Reply, and Setup. The main content area is titled 'New Campaign' and features a '+ Create Campaign' button. Below this, there are three tabs: 'Inbox', 'Active Conversation', and 'Inactive Conversation'. The 'Inbox' tab is selected, showing a form with the following fields: '* Name:' with a placeholder 'Enter campaign name here...', '* To:' with a dropdown menu labeled 'Select Object', and a 'Select recipient' field. A large green button labeled '+ Select Template' is positioned at the bottom right of the form. The background of the form area has a faint pattern of speech bubbles.

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.

This screenshot is similar to the previous one, but the 'Enter campaign name here...' input field is highlighted with a yellow background, indicating where the user should enter the campaign name. The rest of the interface, including the sidebar and other form fields, remains the same.

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

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The screenshot shows the HexaConnect interface. On the left is a sidebar with icons for Messages, Templates, Auto-Reply, and Setup. The main header includes the HexaConnect logo and a search bar. Below the header, there's a 'Home' tab and a '+ Create Campaign' button. The 'New Campaign' form is displayed with the following fields:

- Name:** A text input field with the placeholder 'Enter campaign name here...'.
- To:** A dropdown menu labeled 'Select Object' with a list of options: Case, Contact (highlighted), Lead, and Opportunity.

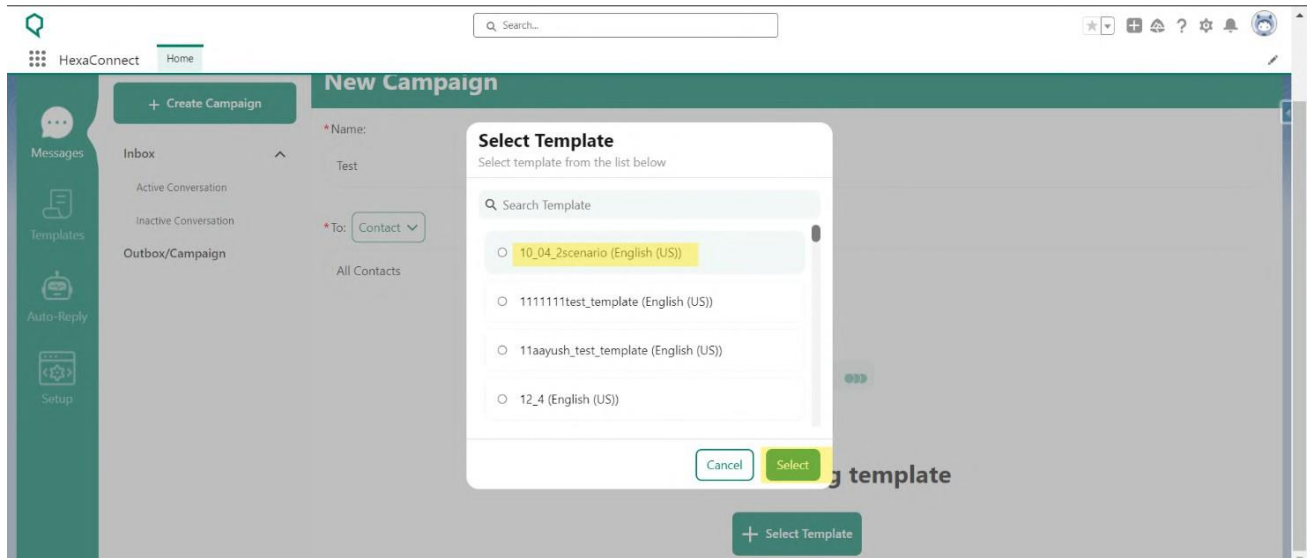
Step 5: Based on the object selection, the related list will be displayed in the next field.

This screenshot shows the 'New Campaign' form after selecting 'Contact' as the object. The form now includes an additional field:

- Select recipient:** A list of related items for 'Contact', including 'All Contacts', 'Ayush', and 'Birthdays This Month'.

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.

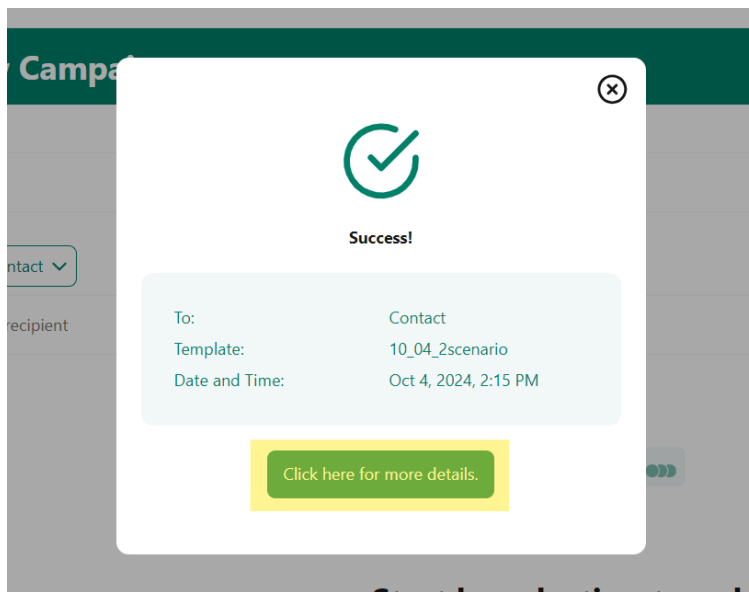


Step 8: Click on "Send" to either send the campaign immediately or schedule it for a later time.

OR

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





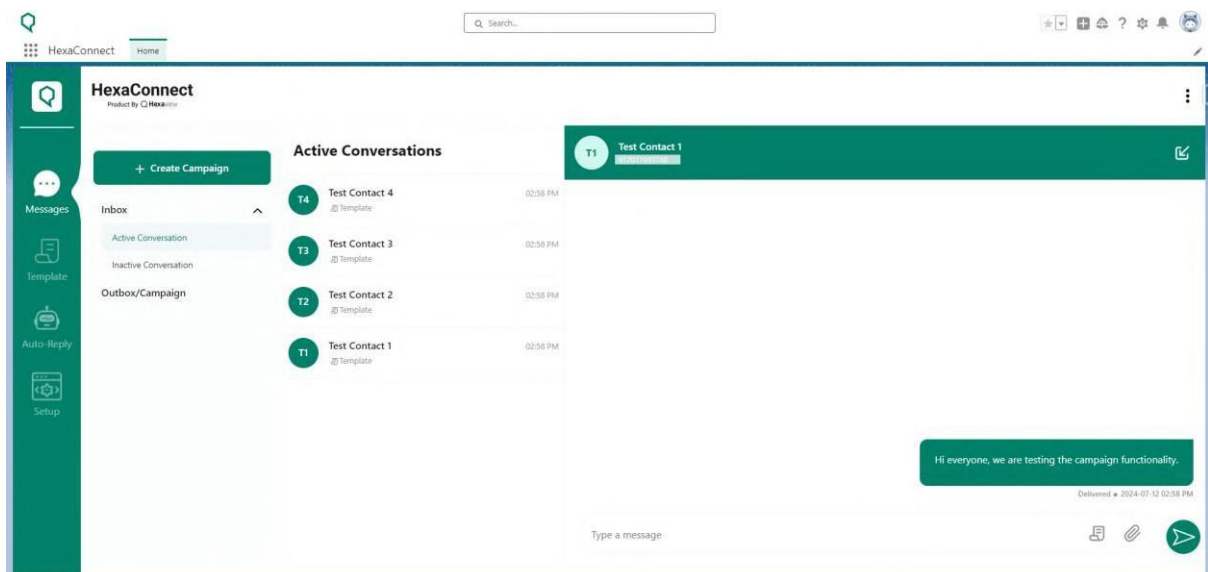
Campaigns

Search Campaign

Status All

Refresh

Name	Created On↓	Sent On	Status	Sent	Open	Delivered
Test	Oct 4, 2024 14:15	Oct 4, 2024 14:15	Error	2	0	1



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.

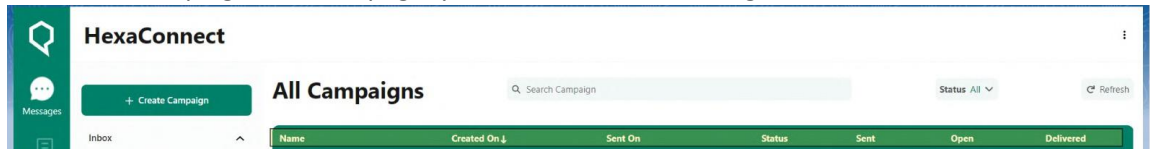
Note: The open rate is synced with Meta and may take some time to reflect the actual numbers.

A product by Hexaview Technologies Inc.

www.hexaviewtech.com

How To View/Track Campaign History

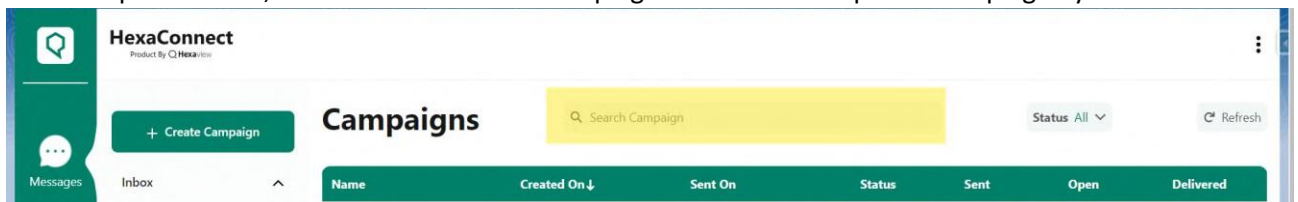
1. Go to the homepage.
2. Click on the Message tab.
3. Click on the "Outbox/Campaigns" text. A page will open with a list of all previously sent and scheduled campaigns. On this page, you can view the following details:



- 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.

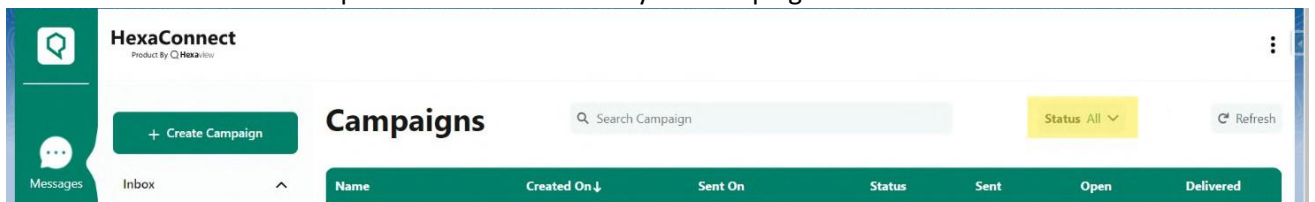
How To Search/Filter the List of Scheduled Campaign

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.

Campaigns

Name	Created On↓	Sent On	Status	Sent	Open	Delivered
Test	Oct 4, 2024 14:15	Oct 4, 2024 14:15	Error	2	0	1

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.

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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.

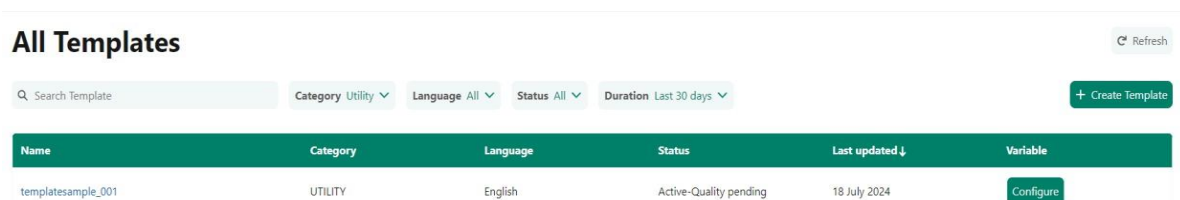


4.4.3 Configure templates

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.

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The screenshot shows the HexaConnect interface. On the left is a sidebar with navigation icons for Messages, Template, Auto-Reply, and Setup. The main area is titled 'All Templates' and contains a table of templates. On the right, a 'Configure Variable' sidebar is open for the template 'templatesample_001'.

Name	Category	Language	Status
templatesample_001	UTILITY	English	Active-Quality pending
test_inactive	MARKETING	English	Active-Quality pending
test_campaign	MARKETING	English	Active-Quality pending
1_26	MARKETING	English	Active-Quality pending
button_test_1	MARKETING	English	Active-Quality pending
hi_9	MARKETING	English	Active-Quality pending
hi_10	MARKETING	English	Active-Quality pending
hi_8	MARKETING	English	Active-Quality pending
hi_7	MARKETING	English	Active-Quality pending
hi_6	MARKETING	English	Active-Quality pending

Configure Variable

Template Name: templatesample_001

Hi {{1}}, your order has shipped!

Your tracking number is {{2}}.
Estimated delivery is {{3}}.

We will continue to provide updates on this shipment until it is delivered.
Thanks and have a nice day!

Object:

Body

Value {{1}}

Value {{2}}

Value {{3}}

- Select the object that you want to pick variable values from records (For example, First Name or Case 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'.

This screenshot is similar to the previous one, but the 'Object' dropdown in the 'Configure Variable' sidebar is now set to 'Contact'. The 'Body' section shows the variable {{1}} populated with the text 'First Name(firstname)'.

Name	Category	Language	Status
templatesample_001	UTILITY	English	Active-Quality pending
test_inactive	MARKETING	English	Active-Quality pending
test_campaign	MARKETING	English	Active-Quality pending
1_26	MARKETING	English	Active-Quality pending
button_test_1	MARKETING	English	Active-Quality pending
hi_9	MARKETING	English	Active-Quality pending
hi_10	MARKETING	English	Active-Quality pending
hi_8	MARKETING	English	Active-Quality pending
hi_7	MARKETING	English	Active-Quality pending
hi_6	MARKETING	English	Active-Quality pending

Configure Variable

Template Name: templatesample_001

Hi {{1}}, your order has shipped!

Your tracking number is {{2}}.
Estimated delivery is {{3}}.

We will continue to provide updates on this shipment until it is delivered.
Thanks and have a nice day!

Object:

Body

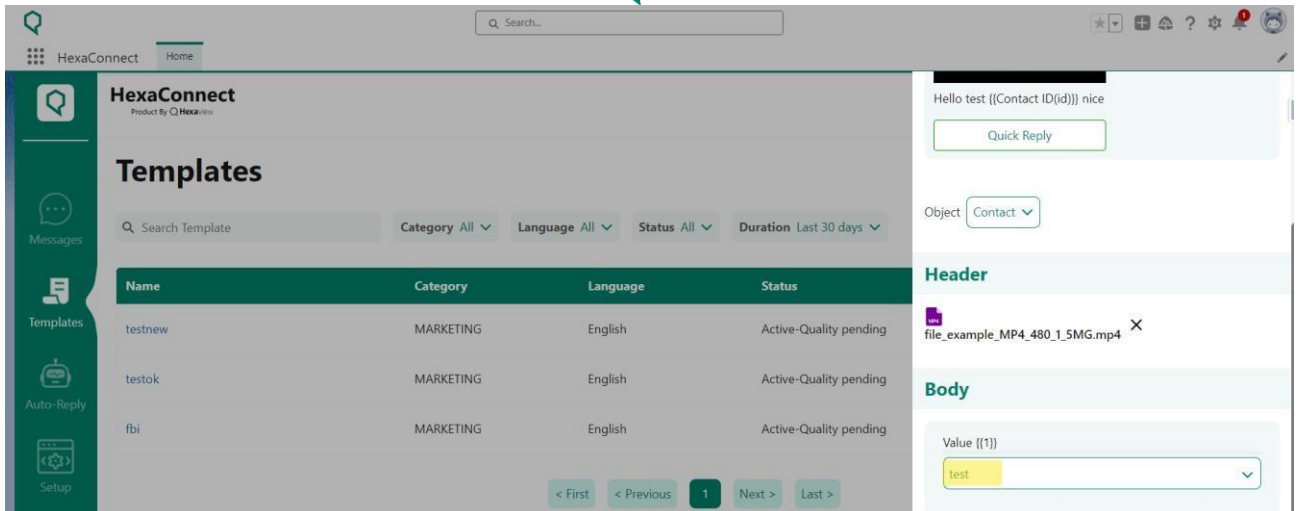
Value {{1}}

Value {{2}}

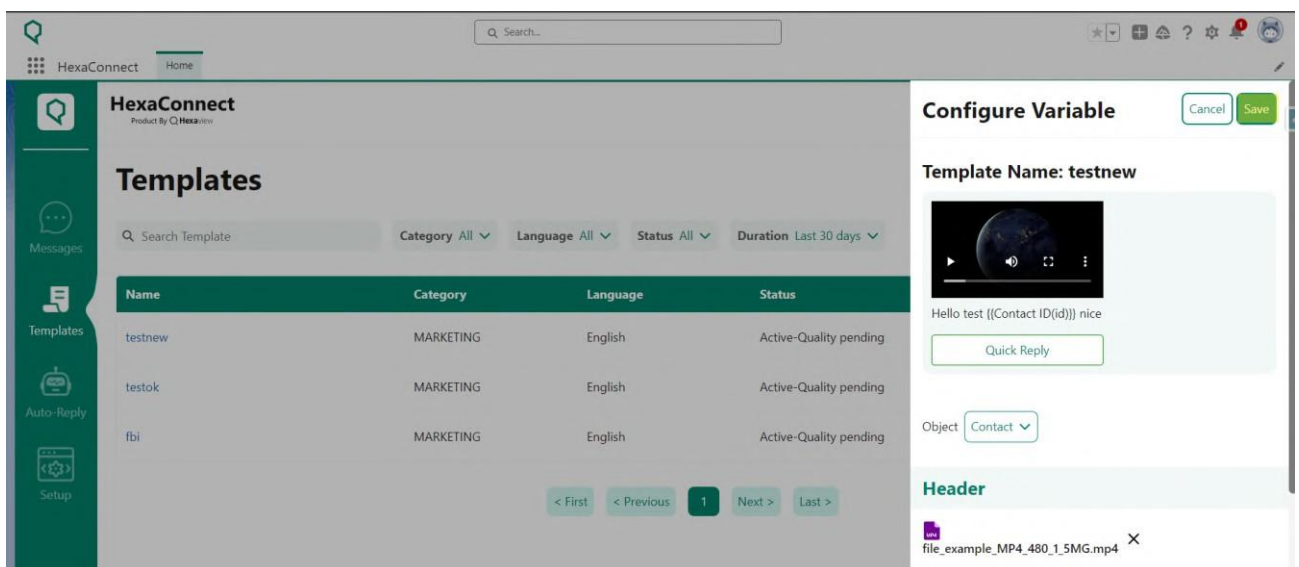
Value {{3}}

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

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- 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

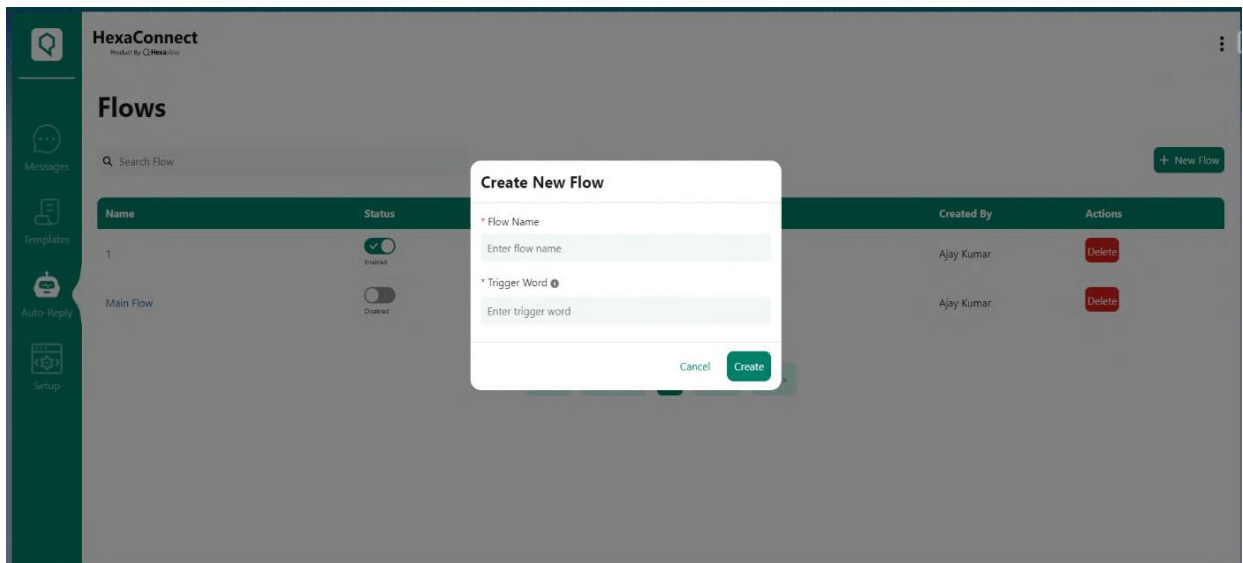
4.5.1 Flow Setup

- 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.

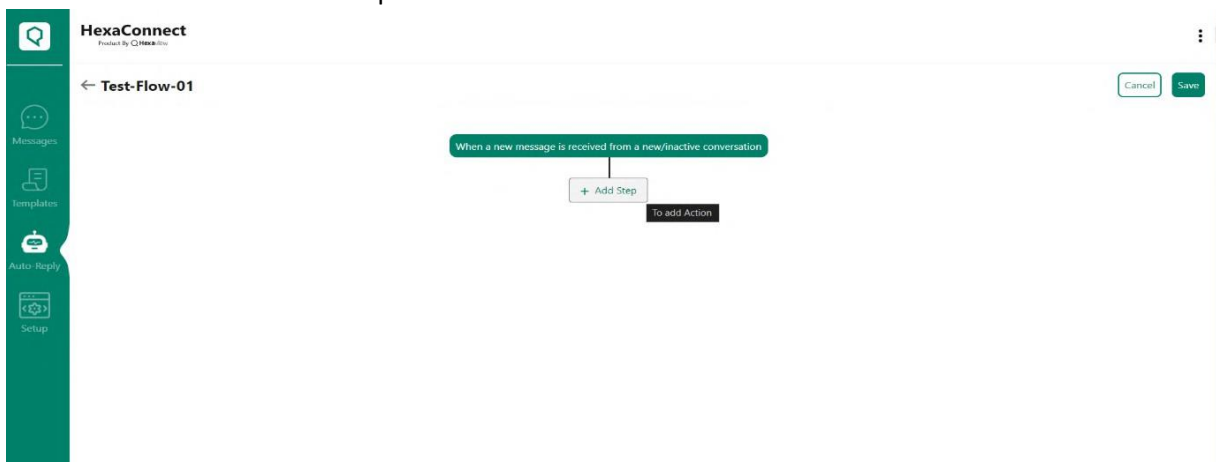
HexaConnect



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

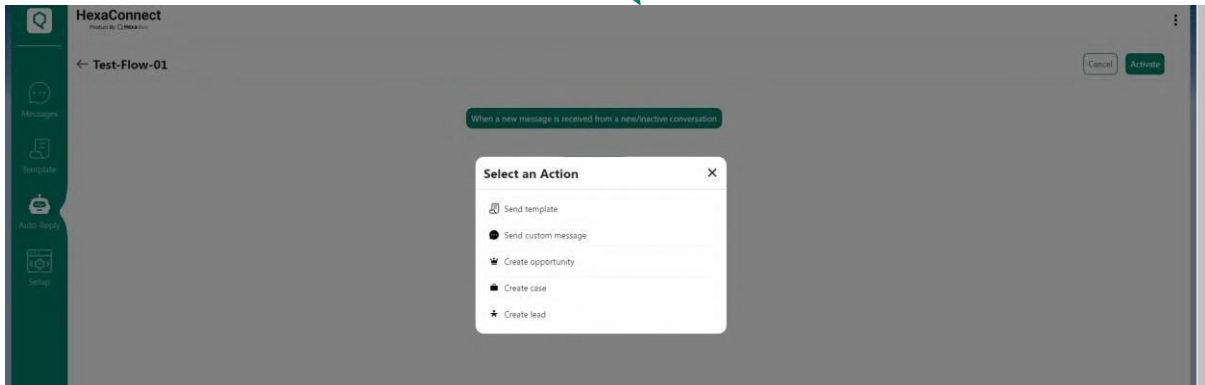


- Enter the trigger word (Example: Hi or Menu) and click on the create button. This trigger word is used to initiate the first step of the flow and helps the end-user to return to the main menu or restart the whole auto response trail.
- Click on the Create button. The user will land on the page to create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

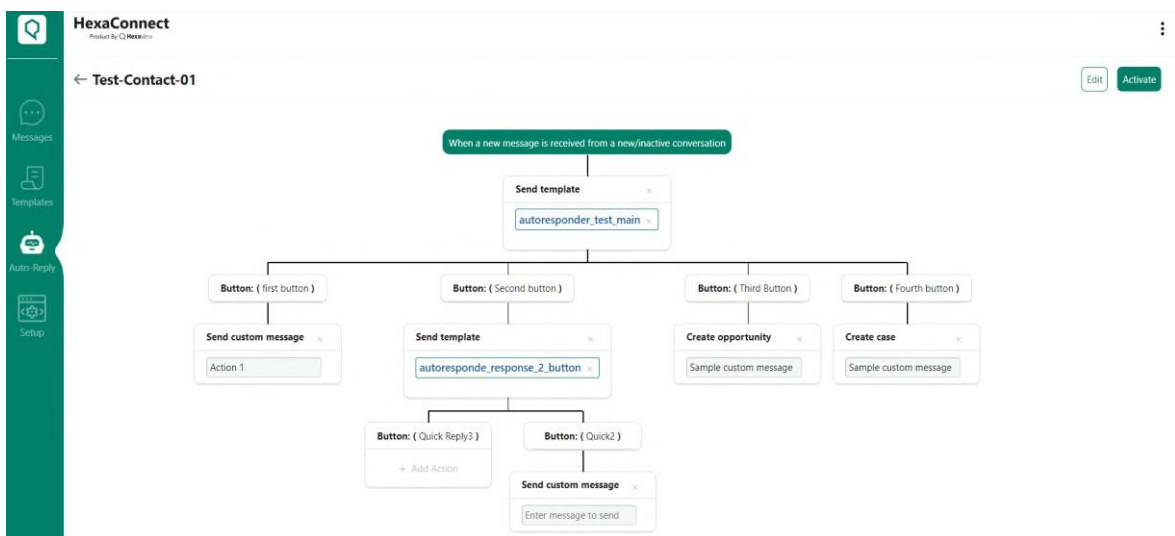


- Select an option from: Send template, Send custom message, Create opportunity, Create case, Create Lead.

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- 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.

HexaConnect

Name	Status	Modified On	Trigger	Created By	Action
Main Flow	Inactive	Aug 6, 2024, 01:00 PM	Hello	Ajay Kumar	Delete
1	Inactive	Aug 8, 2024, 07:36 PM	1	Ajay Kumar	Delete
Test-Flow-01	Inactive	Aug 7, 2024, 01:44 PM	hi	Arham Nabil	Delete
some flow	Inactive	Aug 8, 2024, 07:55 PM	my	Ajay Kumar	Delete

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

Flows

Name	Status	Modified On	Trigger	Created By	Action
Main Flow	Inactive	Aug 6, 2024, 01:00 PM	Hello	Ajay Kumar	Delete

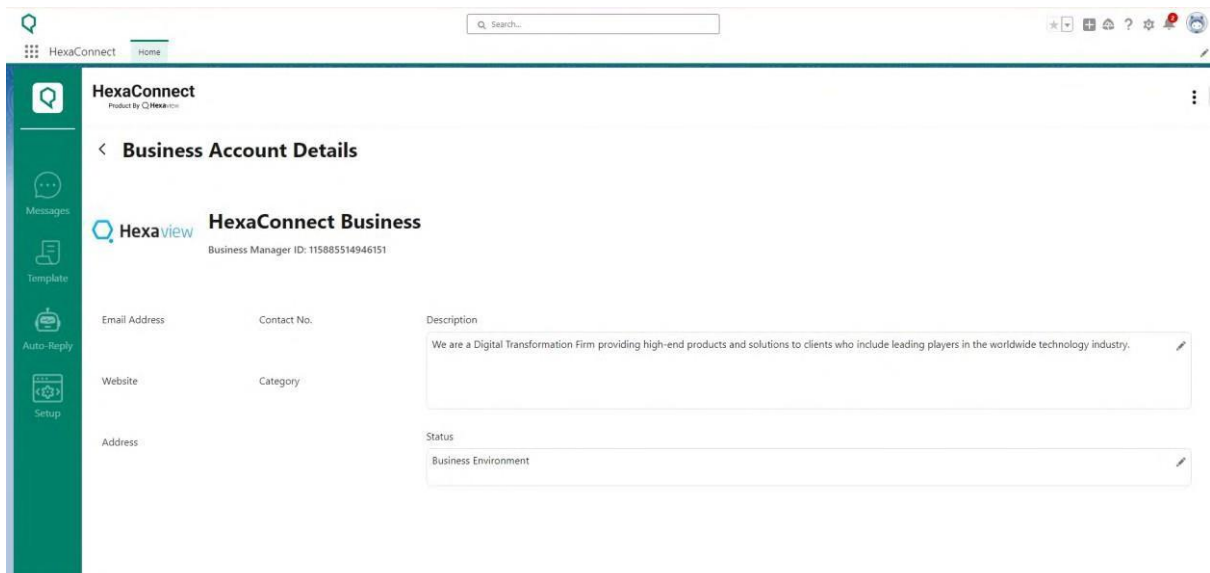
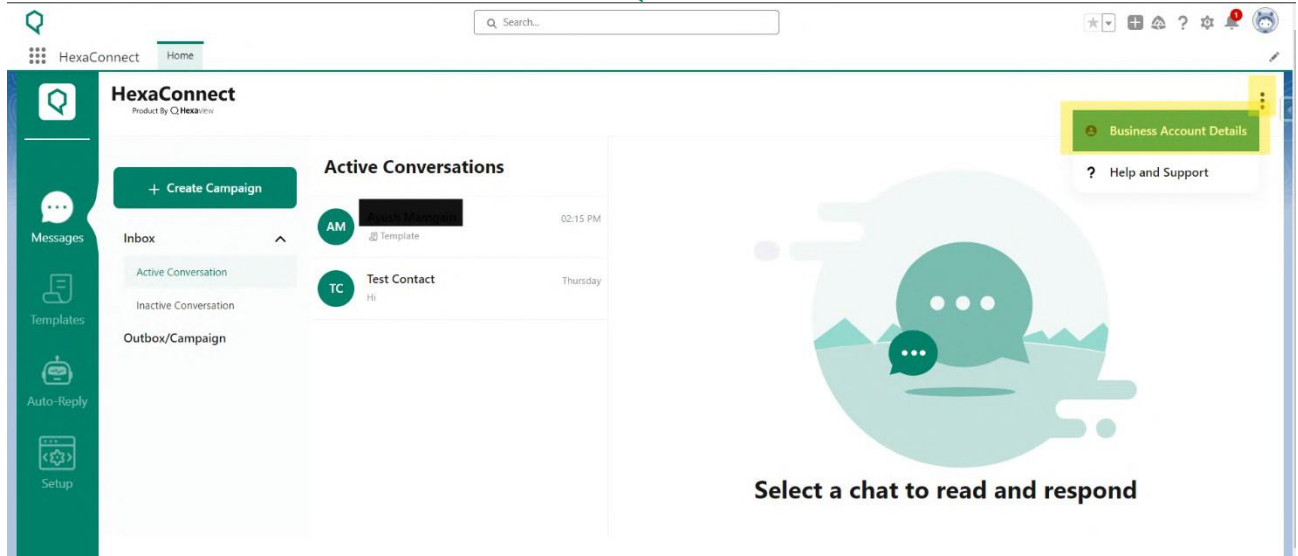
- If the flow is active the user must deactivate the flow first for any changes to be made.

```
graph TD; Trigger[When a new message is received from a new/inactive conversation] --> Action[Send template]; Action --> Template[first_menu]; Action --> Button1[Button: ( Buy a new Product )]; Action --> Button2[Button: ( Help for existing product )]; Action --> Button3[Button: ( Account Information )]; Action --> Button4[Button: ( Latest Offers )]; Action --> Button5[Button: ( Current Bestsellers )];
```

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.

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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