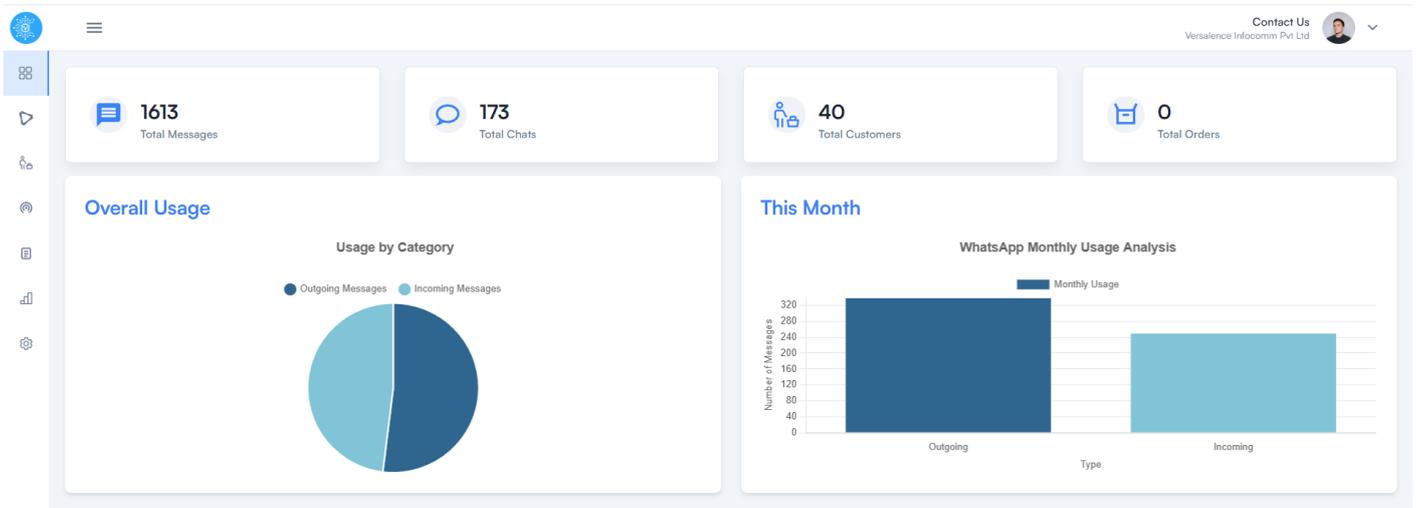


# The Platform

This document covers details of how to use the platform

- Dashboard
- Customer Response Management - CRM
  - Conversations
  - Interactions
- Contact Management
  - Contacts
  - Groups aka Segments
- Broadcast
  - Template Management
  - Create Template
  - Campaigns
- Product
- Order
  - Order / Service / Appointment
- Settings
  - Customizing your Webchat CSS

# Dashboard

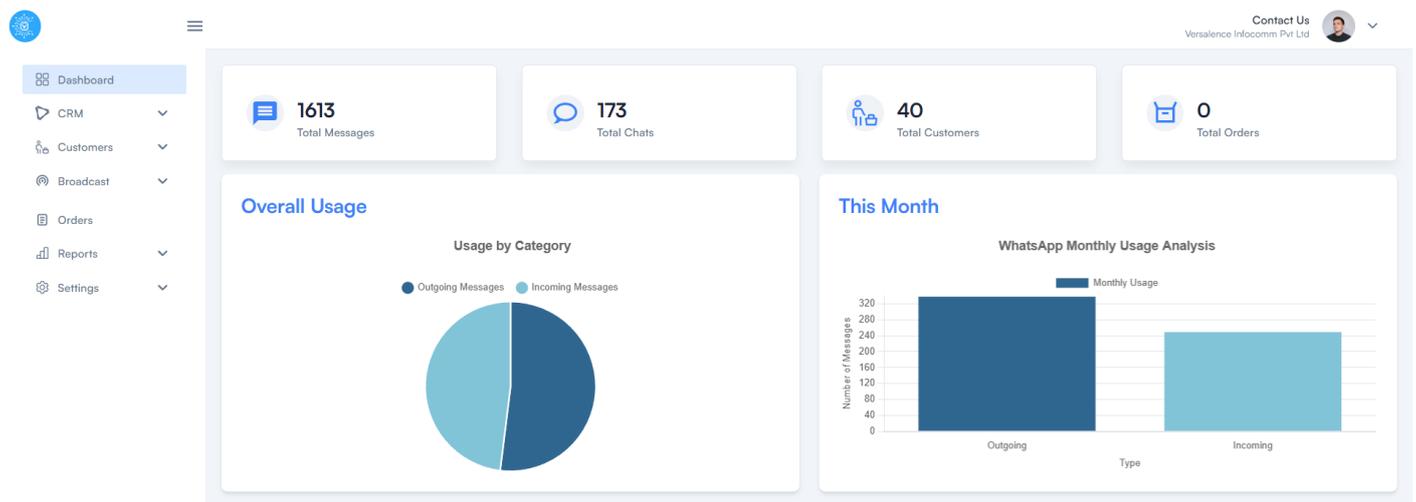


The landing page of the vCX platform is the dashboard.

The main page shows important stats that are useful like total messages, total chat, total customers, and total orders/appointments in the last 30 days

It is neatly laid out to give you access to all features of the payment using the vertical left menu bar

The menu bar can be expanded to get a full view by clicking on the hamburger menu lines

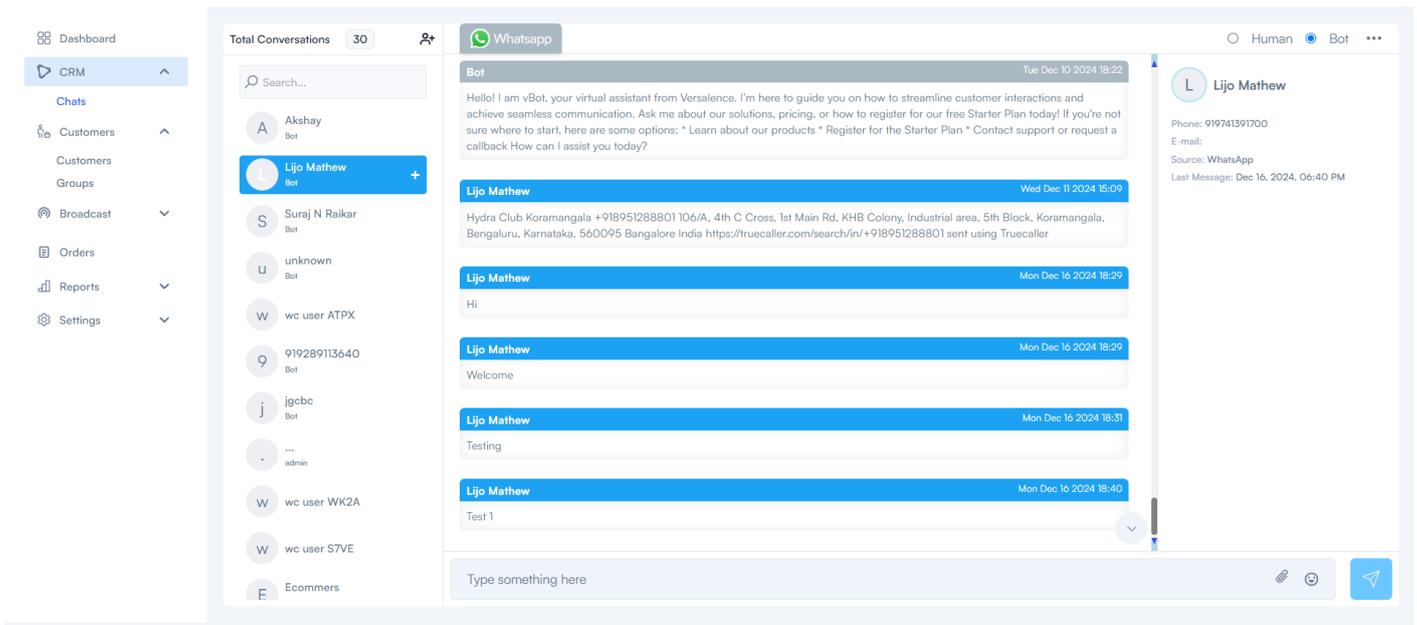


# Customer Response Management - CRM

vCX - The Social CRM by Versalence is designed to revolutionize customer communication and engagement by integrating multiple channels into a **single omnichannel interface**. It brings together messaging platforms and social media channels, offering businesses a seamless and unified way to interact with their customers.

# Conversations

vCX – The Social CRM by Versalence is designed to revolutionize customer communication and engagement by integrating multiple channels into a **single omnichannel interface**. It combines messaging platforms and social media channels, offering businesses a seamless and unified way to interact with their customers.



## Key Components of the Social CRM

### 1. Conversations

Conversations encompass all **messaging channels** that enable real-time communication with customers. These include:

- **WhatsApp**
- **Webchat**
- **Instagram Messaging**
- **Telegram**
- **And more!**

**Conversations** are ideal for direct, instant interactions and customer support, enabling businesses to respond to inquiries quickly and efficiently.

# Interactions



## 2. Interactions

Interactions focus on **social media channels** where businesses engage with customers through posts, comments, likes, and other social activities. These include:

- **Facebook**
- **LinkedIn**
- **Instagram**

**Interactions** help businesses manage their online presence, gather customer feedback, and build brand loyalty across social platforms.

---

# How vCX Brings Everything Together

The Social CRM combines **Conversations** and **Interactions** into one **centralized dashboard**, enabling businesses to:

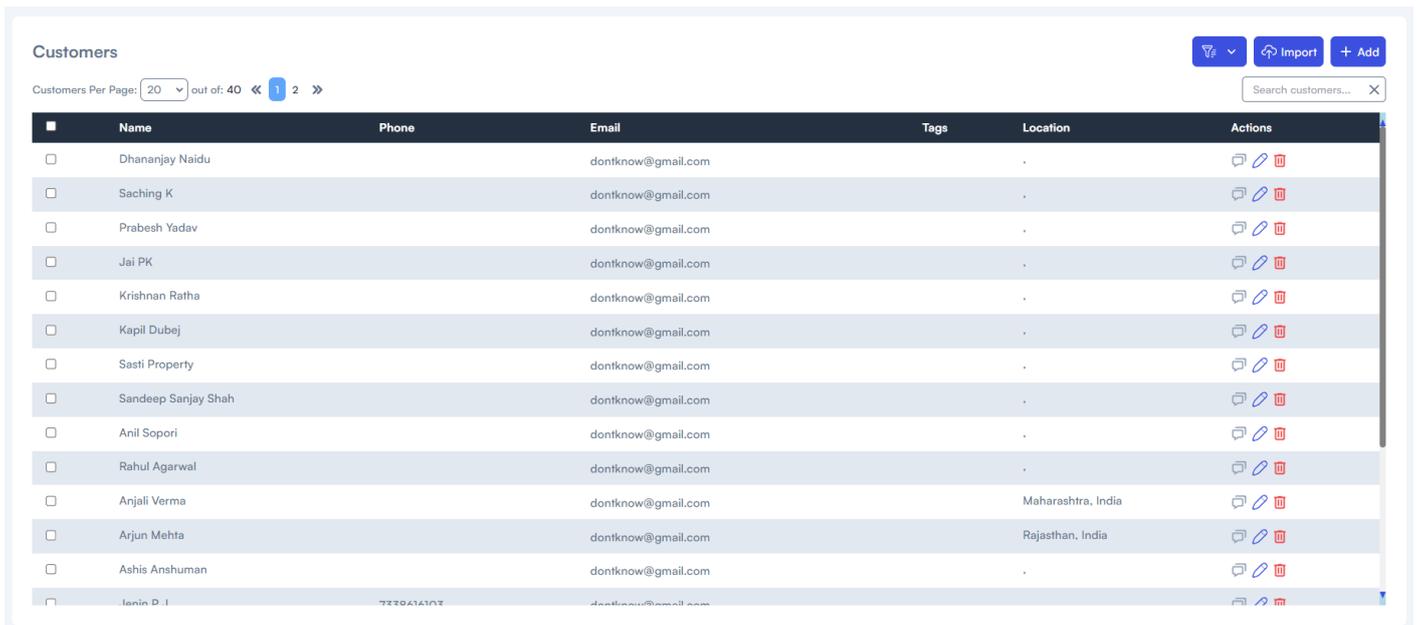
- **Streamline Communication:** No more switching between platforms—manage all customer conversations and interactions in one place.
- **Enable Convergence:** Achieve true omnichannel engagement by integrating messaging and social channels.
- **Enhance Efficiency:** Respond faster and ensure a consistent experience for customers across all channels.

# Contact Management

The **Contacts Module** in vCX - The Social CRM is designed to help businesses effectively **organize, manage, and leverage their customer base** for better communication and engagement.

# Contacts

The **Contacts Module** in vCX – The Social CRM is designed to help businesses effectively **organize, manage, and leverage their customer base** for better communication and engagement.



The screenshot displays the 'Customers' management interface. At the top, there are buttons for 'Import' and '+ Add', and a search bar labeled 'Search customers...'. Below the search bar, it indicates 'Customers Per Page: 20 out of 40' with navigation arrows. The main content is a table with the following columns: Name, Phone, Email, Tags, Location, and Actions. The table lists 15 customer records, each with a checkbox for selection and three icons (message, edit, delete) in the Actions column. The 'Location' column shows some records as '.' and others as 'Maharashtra, India' or 'Rajasthan, India'.

Name	Phone	Email	Tags	Location	Actions
Dhananjay Naidu		dontknow@gmail.com		.	Message Edit Delete
Saching K		dontknow@gmail.com		.	Message Edit Delete
Prabesh Yadav		dontknow@gmail.com		.	Message Edit Delete
Jai PK		dontknow@gmail.com		.	Message Edit Delete
Krishnan Ratha		dontknow@gmail.com		.	Message Edit Delete
Kapil Dubej		dontknow@gmail.com		.	Message Edit Delete
Sasti Property		dontknow@gmail.com		.	Message Edit Delete
Sandeep Sanjay Shah		dontknow@gmail.com		.	Message Edit Delete
Anil Sopori		dontknow@gmail.com		.	Message Edit Delete
Rahul Agarwal		dontknow@gmail.com		.	Message Edit Delete
Anjali Verma		dontknow@gmail.com		Maharashtra, India	Message Edit Delete
Arjun Mehta		dontknow@gmail.com		Rajasthan, India	Message Edit Delete
Ashis Anshuman		dontknow@gmail.com		.	Message Edit Delete
Jenip D. I	7379414107	dontknow@gmail.com		.	Message Edit Delete

## What is the Contacts Module?

The Contacts Module serves as the central hub for all your customer information, enabling businesses to:

- **Search and Find Contacts:** Quickly locate any contact using powerful search filters.
- **Send Messages:** Initiate one-on-one conversations directly from the contact list.
- **Broadcast Campaigns:** Use contact groups to send mass messages and announcements.
- **Track Activities:** Know who has placed an order, booked a service, or scheduled an appointment.

## Key Features

### 1. Contact Organization

- Import or add contacts manually.
  - Tag and categorize contacts for easy filtering.
  - View detailed profiles, including past interactions, orders, or appointments.
- 

# Why Use the Contacts Module?

The Contacts Module empowers businesses to:

- **Streamline Communication:** Easily manage customer interactions and ensure faster response times.
- **Enhance Personalization:** Use detailed contact data to craft targeted and relevant messages.
- **Improve Customer Insights:** Understand customer preferences, orders, and engagement history at a glance.
- **Boost Campaign Effectiveness:** Dynamic groups make it easy to target the right audience with minimal effort.

# Groups aka Segments

## Groups and Customer Segmentation

The Contacts Module in vCX takes customer segmentation to the next level with **dynamic groups**, enabling businesses to categorize and target their customers more effectively.

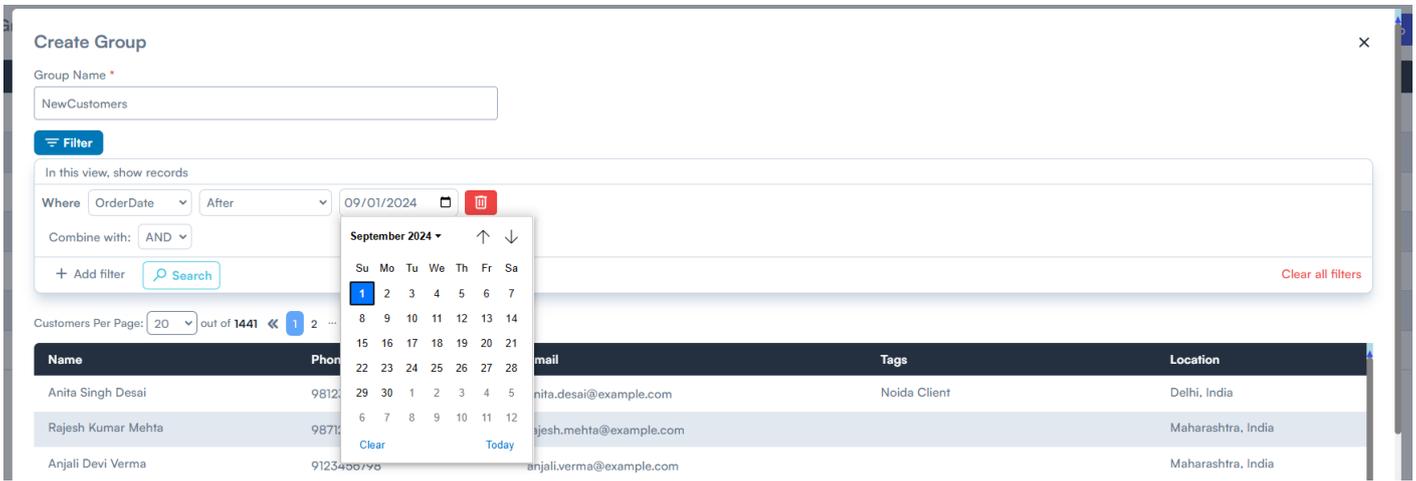
Groups  [Create Group](#)

	Name	Created At	Actions
1	<a href="#">Team</a>	9/23/2024	
2	<a href="#">Noida Client</a>	10/26/2024	
3	<a href="#">Gorakhpur Clients</a>	10/27/2024	
4	<a href="#">South Delhi Clients</a>	10/27/2024	
5	<a href="#">Divya</a>	11/3/2024	
6	<a href="#">Noida - Ph 98</a>	11/16/2024	
7	<a href="#">Default(All Customers)</a>	11/19/2024	

## What are Groups?

Groups allow you to **segment customers** based on multiple parameters, ensuring you always reach the right audience. These groups are **dynamic**, meaning they automatically update when customer information changes, ensuring your segmentation remains accurate and up-to-date.

---



# Segmentation Parameters

## 1. Contact Attributes:

- Name, email, phone number
- Location (city, region, or country)
- Tags for specific categories (e.g., VIP, leads, loyal customers)

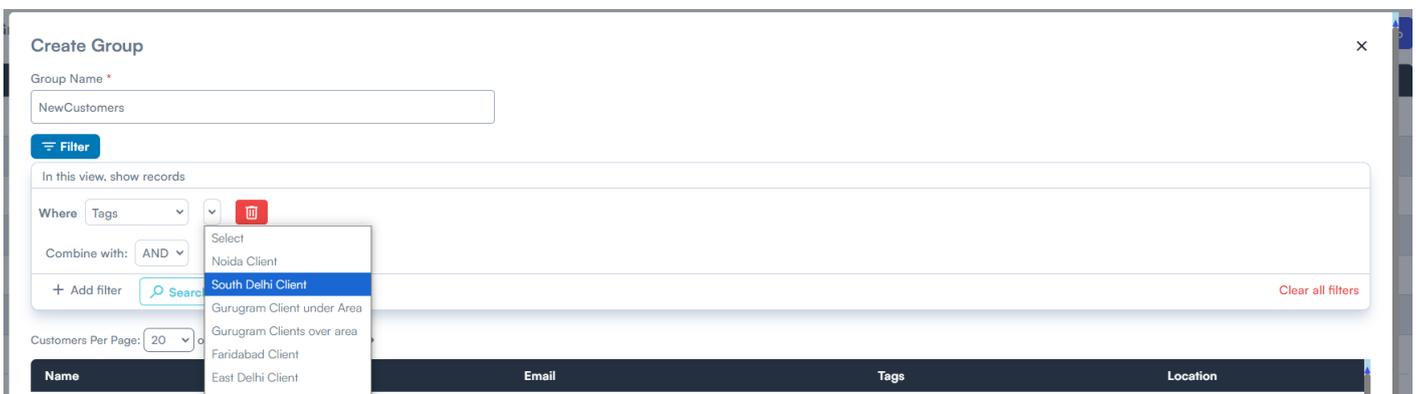
## 2. Order-Based Parameters:

- Purchase history (frequency, last purchase date, or total spend)
- Order type (products, services, or appointments)
- Order status (completed, pending, or canceled)

## 3. Engagement Metrics:

- Interaction frequency (number of messages or responses)
- Last communication date
- Participation in previous campaigns

By combining these parameters, you can create highly targeted customer segments tailored to your business needs.



# Why Dynamic Groups Matter

- **Always Up-to-Date:** Dynamic groups automatically include or remove customers based on real-time data, so your campaigns always target the right audience.
  - **Improved Targeting:** Leverage granular segmentation to craft highly relevant messages, offers, or campaigns.
  - **Enhanced Automation:** Use groups to power broadcast campaigns, workflows, or reminders without manual updates.
  - **Personalized Engagement:** Reach customers with content that aligns with their behavior, preferences, and history.
- 

## Examples of Dynamic Groups

1. **New Customers:**  
Segment customers who placed their first order within the last 30 days.
  2. **High-Value Customers:**  
Target customers with total purchases exceeding a specific value.
  3. **Appointment-Based Segments:**  
Group customers who have scheduled appointments in the upcoming week.
  4. **Inactive Customers:**  
Create a segment for customers who haven't interacted in the last 60 days to re-engage them with campaigns.
  5. **Tag-Based Segments:**  
Use tags like "VIP," "Returning," or "Prospect" to segment contacts for personalized follow-ups.
- 

## How to Use Groups

1. Define segmentation parameters based on customer behavior, tags, or orders.
  2. Use groups to:
    - Send **targeted broadcast campaigns**.
    - Automate follow-ups and reminders.
    - Analyze customer segments to refine strategies.
  3. Monitor group performance and tweak parameters to align with business goals.
- 

## The Power of Segmentation

With vCX's dynamic and intelligent grouping, you can **unlock the full potential of customer data** to drive personalized engagement, improve campaign performance, and boost overall customer satisfaction.

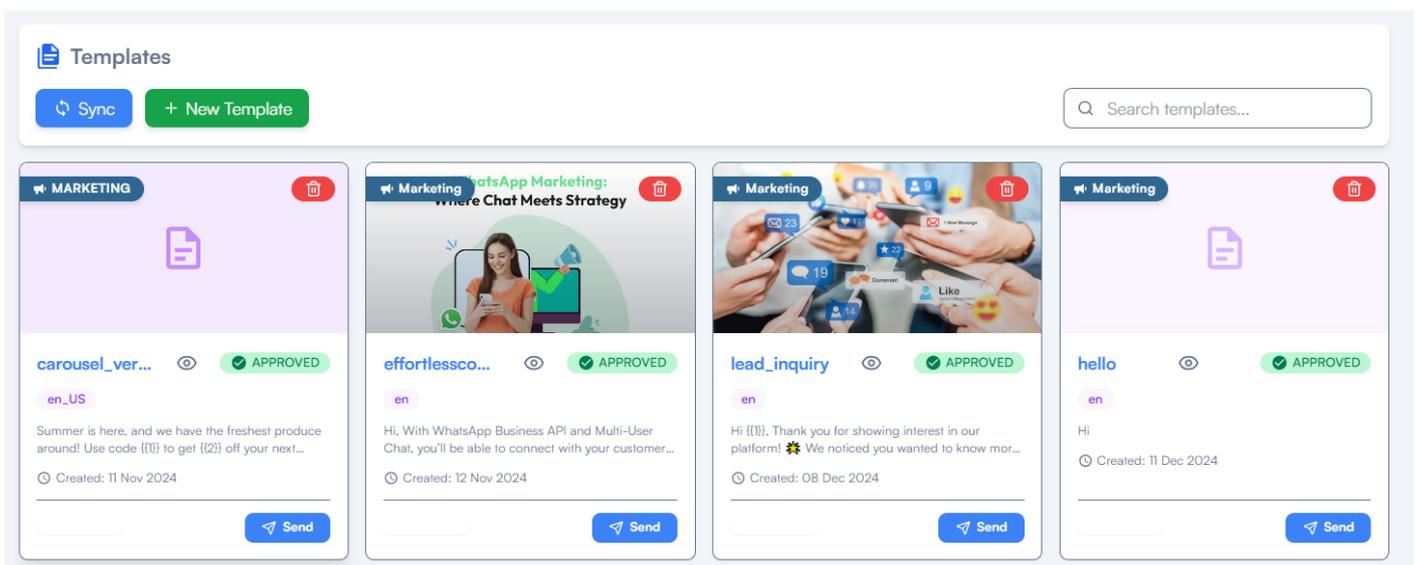
# Broadcast

Broadcast takes communication with customers to a new level. This sections allows you to personalise your conversations, updates with meaningful templates from our "Template Library" and your own customized templates. Creating Campaigns is much easier with templates, contacts, products and orders

# Template Management

## Templates Module

The **Templates Module** in vCX simplifies communication by enabling businesses to send predefined or customized messages quickly and effectively. Templates are powerful tools for initiating conversations, ensuring consistency, and saving time.



## What are Templates?

Templates are **pre-approved message formats**, currently available for **WhatsApp**, that help businesses engage with customers seamlessly. Whether you're sending updates, offers, or reminders, templates make communication faster and more efficient.

## Key Features

### 1. WhatsApp Templates

- Create templates for common communication needs like order updates, appointment reminders, or promotional offers.
- Use **pre-approved templates** to ensure compliance with WhatsApp Business API policies.

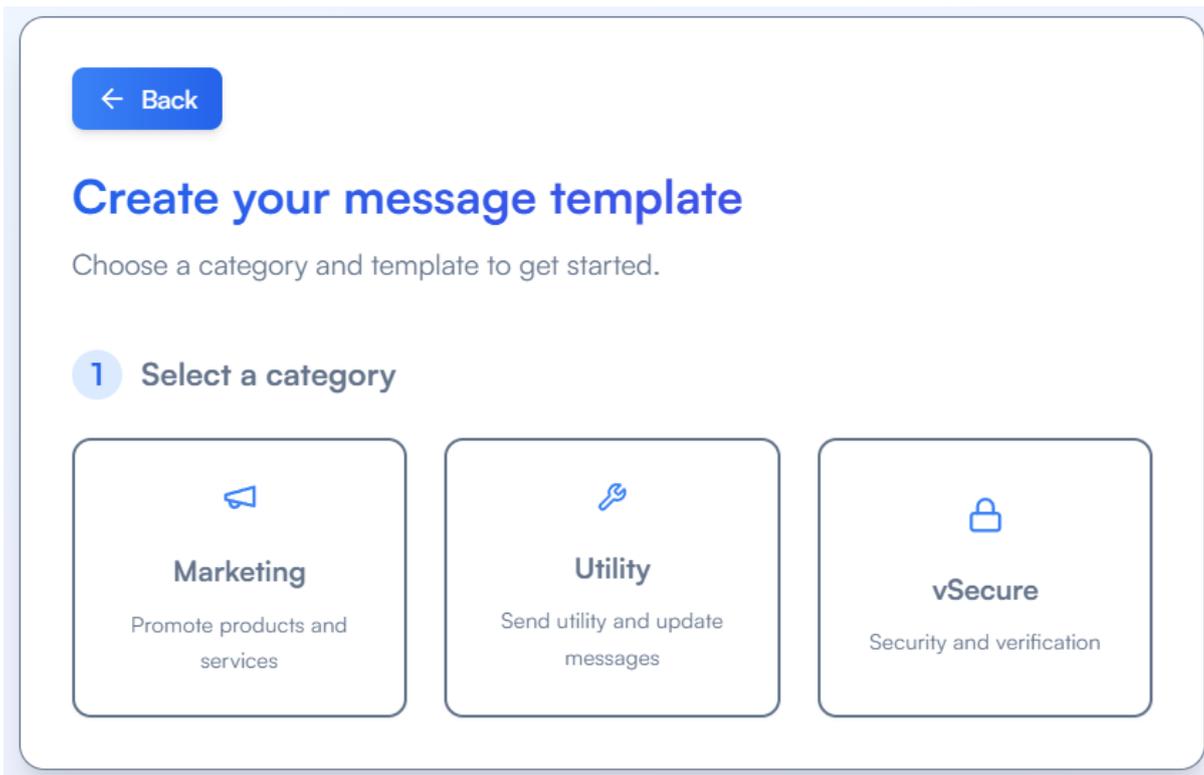
## 2. **Template Library** *(Coming Soon!)*

- Access a library of **predefined templates** created for various use cases.
- Pick a template, **customize it** to match your brand tone, or use it as-is.
- Save time by avoiding the need to draft messages from scratch.

## 3. **Multi-Channel Integration** *(Future Scope)*

- Templates will soon extend to other messaging channels beyond WhatsApp for omnichannel communication.

# Templates Category



- **Marketing:** Templates that are used for Marketing your products and services.
- **Utility:** Templates that are part of a transaction e.g. order confirmation, payment receipt, booking confirmation etc.
- **vSecure:** vSecure is an alternative for passwords, it can be used as OTP (one time password) or can implement deeplink to login to applications with out entering a password.

# Template type

## 1. Marketing Templates

## 2 Choose template type



### Template Library

Access our curated collection of high-performing marketing templates



### Custom

Create personalized promotional messages with custom text and media



### Carousel

Showcase multiple products in an interactive scrollable format



### Catalog

Share your full product catalog directly through WhatsApp

- **Library:** A collection of templates that are curated by industry and high performing. (coming soon)
- **Custom:** Create your own templates from scratch, control all elements of your template.
- **Carousel:** Carousel is a great way to display multiple cards as a slider and works as a great marketing message.
- **Catalog:** Catalog templates are a great way to share your products and services collection with your customers (coming soon)

---

## 2. Utility Templates

## 2 Choose template type



### Template Library

Choose from our pre-built collection of proven utility message templates



### Custom

Create personalized messages for existing orders or accounts



### Order status

Keep customers informed about their order progress in real-time



### Order details

Streamline payments with detailed order information messages

- **Library:** A collection of templates that are curated by industry and high performing. (coming soon)
- **Custom:** Create your own templates from scratch, control all elements of your template.
- **Order status:** Customize templates for order status.
- **Order details:** Customize templates for order details

## 3. vSecure Templates

2

### vSecure template



### One-time passcode (OTP)

Send secure verification codes to authenticate users during login, account recovery.

Enhanced security with vSecure technology.

- **Library:** A collection of templates that are curated by industry and high performing. (coming soon)
  - **Custom:** Create your own templates from scratch, control all elements of your template.
- 

## Why Use Templates?

- **Conversation Starters:** Initiate meaningful interactions quickly and professionally.
  - **Save Time:** Predefined templates reduce the effort of crafting messages manually.
  - **Consistency:** Ensure uniform messaging across your team.
  - **Scalability:** Templates enable you to send personalized updates at scale.
- 

## Use Cases for Templates

1. **Order Confirmation:** "Hi [Name], your order #[Order ID] has been confirmed and will be delivered soon!"
  2. **Appointment Reminder:** "Reminder: Your appointment with [Business Name] is scheduled for [Date & Time]. Reply 'Confirm' to confirm."
  3. **Promotional Offer:** "🎉 Special Offer! Get 20% off on all products this weekend. Use code SAVE20 at checkout!"
  4. **Feedback Request:** "Thank you for your recent order! We'd love your feedback. Click here: [Link]."
- 

## Future Enhancements

With the upcoming **Template Library**, businesses will be able to:

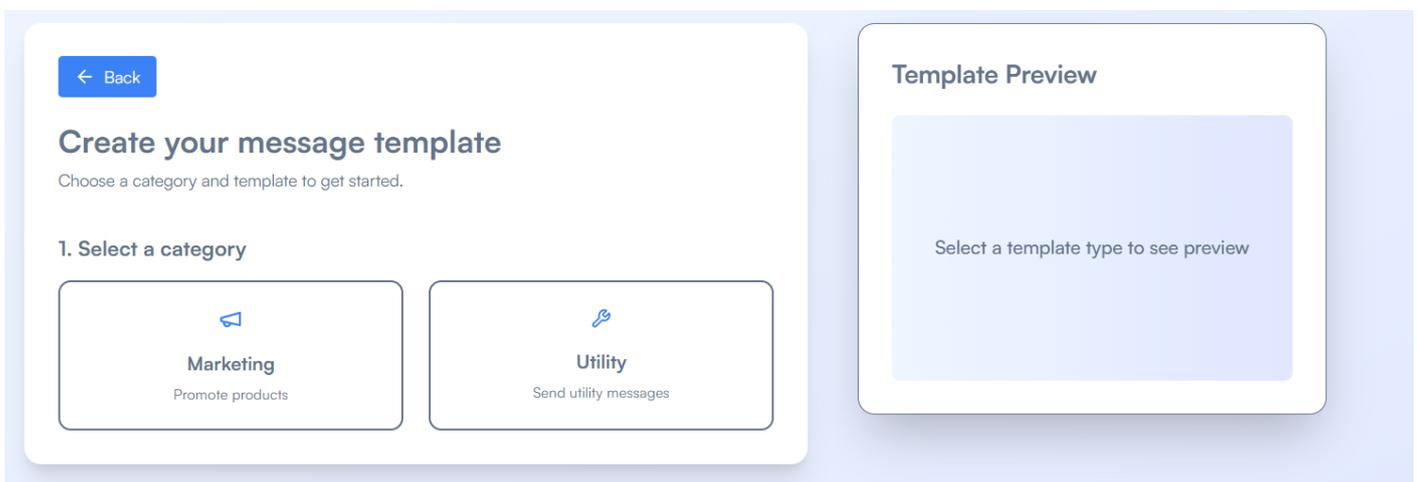
- Choose from a variety of professionally designed templates.
  - Easily customize templates to match branding and tone.
  - Deploy templates across **campaigns, chats, and multiple messaging channels.**
- 

The Templates Module ensures you are always **one step ahead** in customer communication, making every interaction seamless, quick, and impactful.

# Create Template

## Template Creation

The **Template Creation** feature in vCX enables businesses to design and submit message templates for WhatsApp that serve as powerful tools for customer engagement, updates, and secure communication.



## Types of Templates Supported

### 1. Marketing Templates

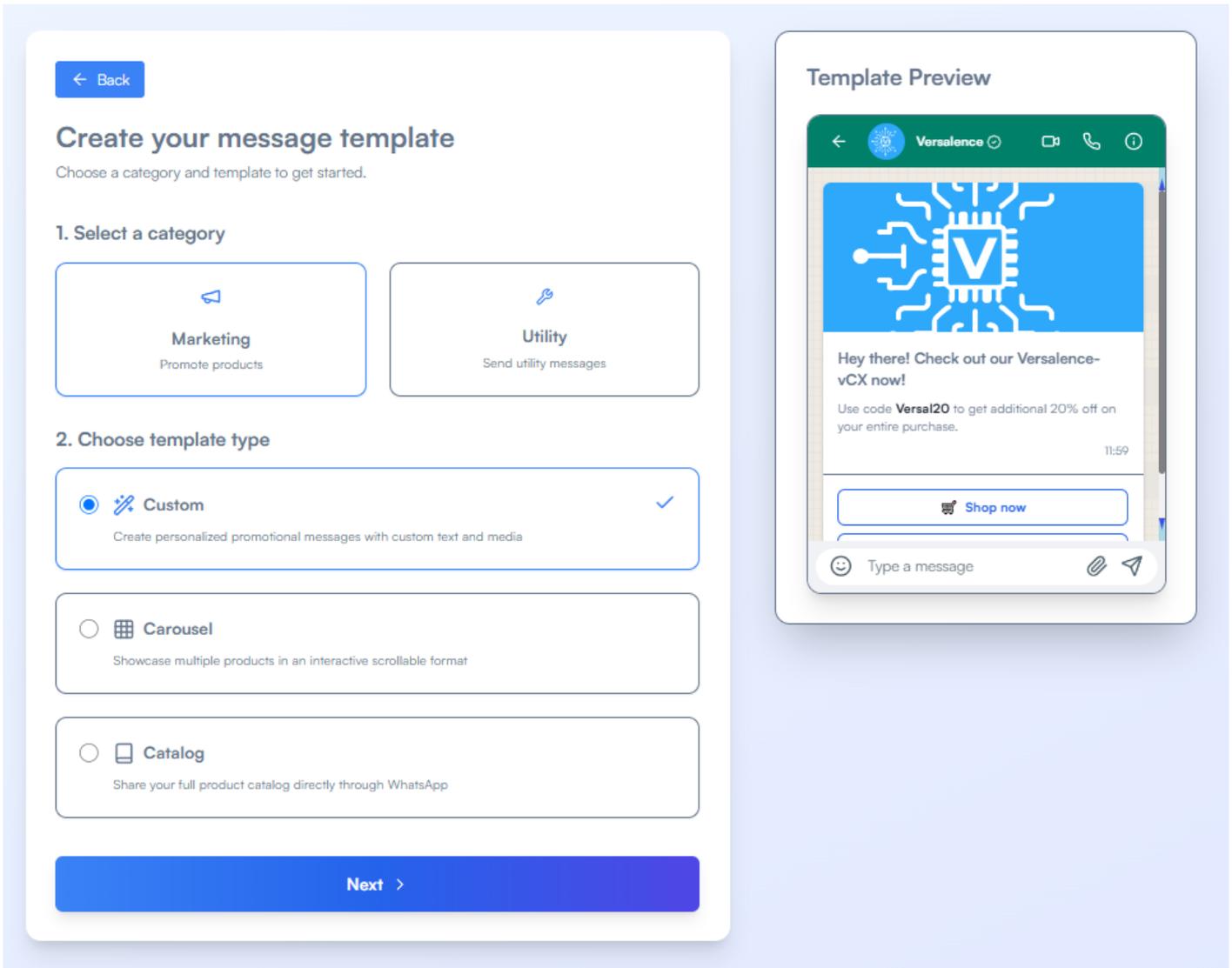
- Used for **promotional messages**, offers, or campaigns.
- Ideal for broadcasting and initiating customer engagement.
- Example: "Hi [Name], enjoy 25% off on your next purchase! Offer valid until this weekend. Shop now!"

### 2. Utility Templates

- Designed for **informational or transactional updates**.
- Perfect for sending order confirmations, appointment reminders, or status updates.
- Example: "Your order #[Order ID] has been shipped. Track it here: [Link]."

### 3. vSecure Templates (Add-on)

- A specialized **authentication template** used for secure customer verification.
- Designed to send OTPs (One-Time Passwords) or secure access messages.
- Ensures security in communication for sensitive processes like login verification or order confirmation.
- Example: "Your vSecure OTP is 123456. Do not share this code with anyone."



## Key Uses for Templates

Templates are versatile and can be used across the vCX platform:

- **Conversation Starters:** Initiate chats with customers in a professional and compliant manner.
- **Broadcast Campaigns:** Target dynamic groups with promotional, informational, or utility messages.
- **Secure Communication:** Use **vSecure** templates to ensure safe and reliable authentication.

### Template Editor

← Back

**Name:**

**Status:**

**Category:**

**Type:**

**Language:**

**Header Type (Optional):**

**Header Text (Optional):**

+ Add Variable

**Body Text:**

Enter your message here...

B I U ↔ 😊
0/1032

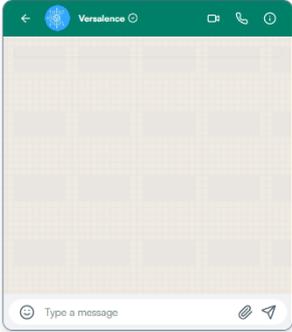
+ Add Variable

**Footer Text (Optional):**

+ Add a Button

Submit For Review

**Message Preview:**



# How to Create a Template

1. **Choose Template Category:**
  - Select from **Marketing**, **Utility**, or **vSecure**.
2. **Draft Content:**
  - Follow WhatsApp's content guidelines for clarity and compliance.
  - Include placeholders (e.g., [Name], [Order ID]) to personalize messages.
3. **Submit for Approval:**
  - Templates must be approved by WhatsApp before use.
  - Track approval status directly in the **Templates Module**.
4. **Deploy Templates:**
  - Use approved templates in **conversations**, **broadcast campaigns**, or **workflows**.

#### Template Preview

**Name:** effortlescommunication

**Status:** APPROVED

**Category:** Marketing

**Type:** Marketing

**Language:** en

**Header Type:** IMAGE

**Header Image URL:** <https://fs.versalence.online/media/53d1bcd3-aa10-45e1-9298-5395bba27b61/template/1731405936387-608678870.PNG>

**Body Text:**

Hi,  
 With WhatsApp Business API and Multi-User Chat, you'll be able to connect with your customers faster, build stronger relationships, and create a more personalized experience — all while saving time and boosting efficiency. Register today and watch your business grow with every conversation!

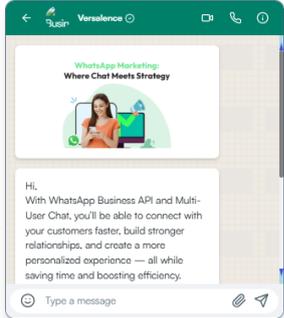
**Footer Text:**

**Quick Reply Buttons:**

Know More

**Call-to-Action Buttons:**

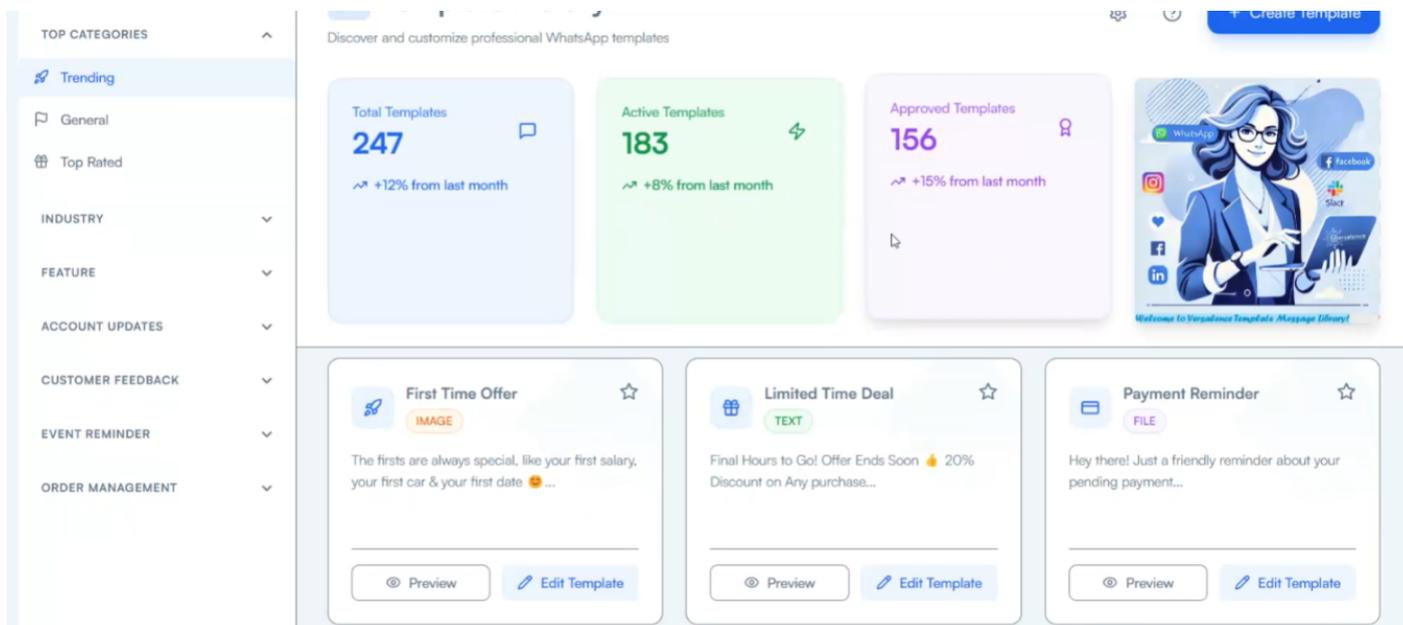
**Message Preview:**



# Coming Soon: Template Library

We are excited to announce the upcoming **Template Library** feature!

- Access a library of **predefined templates** for various use cases.
- Easily customize templates to match your brand's voice.
- Save time and effort with ready-to-use templates for campaigns, chats, and broadcasts.



## Why Use vCX Templates?

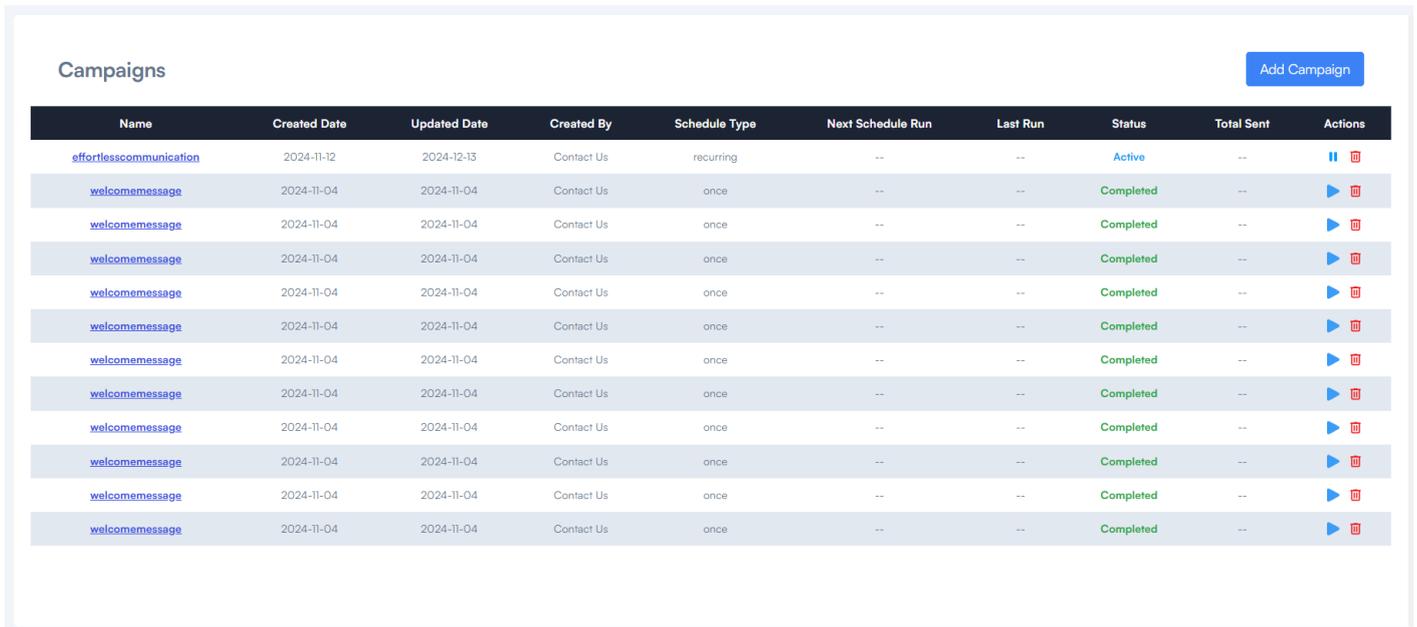
- **Speed and Efficiency:** Preapproved templates enable quick, compliant messaging.
- **Versatile Usage:** Use templates for marketing, customer support, and secure communication.
- **Enhanced Personalization:** Add dynamic fields to tailor messages to each recipient.
- **Secure Add-on:** Ensure customer trust with vSecure authentication templates.
- **Future-Proof:** The **Template Library** will further simplify and scale your messaging efforts.

The **Template Creation** feature in vCX ensures you always have the right message ready—whether it's for promotions, customer updates, or secure verifications—helping you drive engagement and build trust at scale.

# Campaigns

# Campaigns

The **Campaigns Module** in vCX allows businesses to send targeted broadcast messages to groups of users, making it an essential tool for scaling customer engagement and communication.



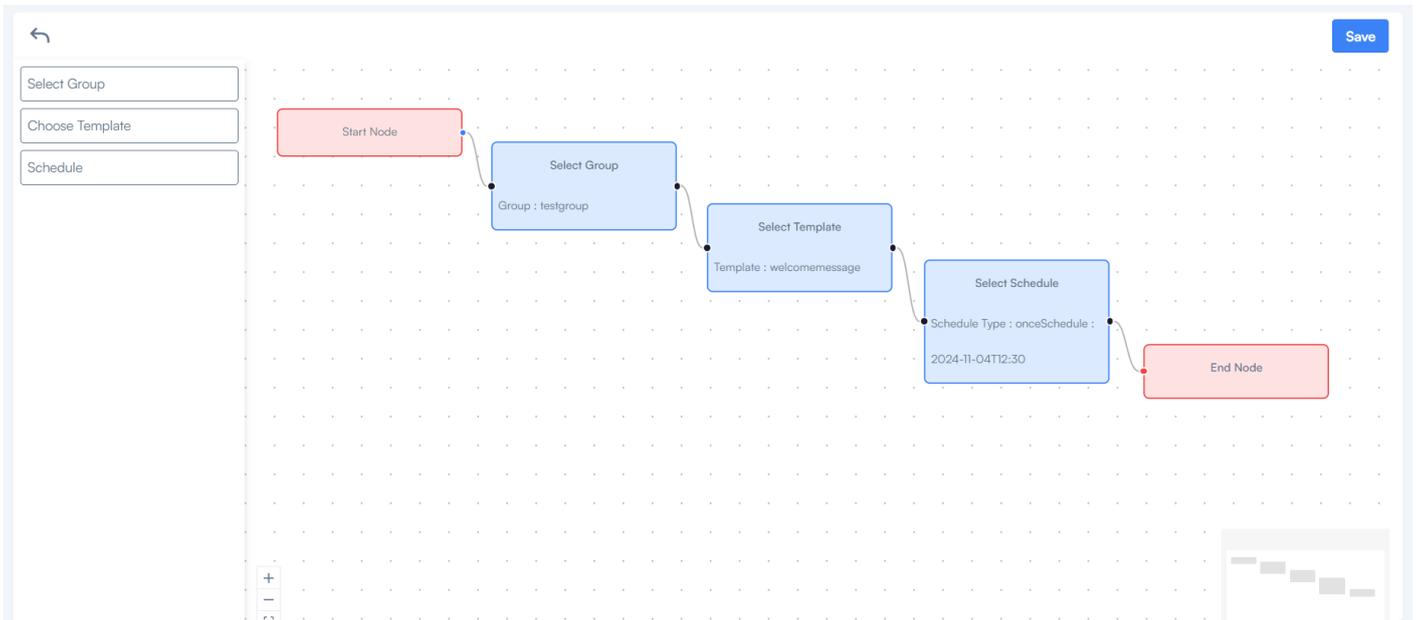
The screenshot displays the 'Campaigns' module interface. At the top right, there is a blue button labeled 'Add Campaign'. Below it is a table with the following columns: Name, Created Date, Updated Date, Created By, Schedule Type, Next Schedule Run, Last Run, Status, Total Sent, and Actions. The table contains 12 rows of campaign data.

Name	Created Date	Updated Date	Created By	Schedule Type	Next Schedule Run	Last Run	Status	Total Sent	Actions
<a href="#">effortlesscommunication</a>	2024-11-12	2024-12-13	Contact Us	recurring	--	--	Active	--	
<a href="#">welcomemessage</a>	2024-11-04	2024-11-04	Contact Us	once	--	--	Completed	--	
<a href="#">welcomemessage</a>	2024-11-04	2024-11-04	Contact Us	once	--	--	Completed	--	
<a href="#">welcomemessage</a>	2024-11-04	2024-11-04	Contact Us	once	--	--	Completed	--	
<a href="#">welcomemessage</a>	2024-11-04	2024-11-04	Contact Us	once	--	--	Completed	--	
<a href="#">welcomemessage</a>	2024-11-04	2024-11-04	Contact Us	once	--	--	Completed	--	
<a href="#">welcomemessage</a>	2024-11-04	2024-11-04	Contact Us	once	--	--	Completed	--	
<a href="#">welcomemessage</a>	2024-11-04	2024-11-04	Contact Us	once	--	--	Completed	--	
<a href="#">welcomemessage</a>	2024-11-04	2024-11-04	Contact Us	once	--	--	Completed	--	
<a href="#">welcomemessage</a>	2024-11-04	2024-11-04	Contact Us	once	--	--	Completed	--	
<a href="#">welcomemessage</a>	2024-11-04	2024-11-04	Contact Us	once	--	--	Completed	--	

## Types of Campaigns

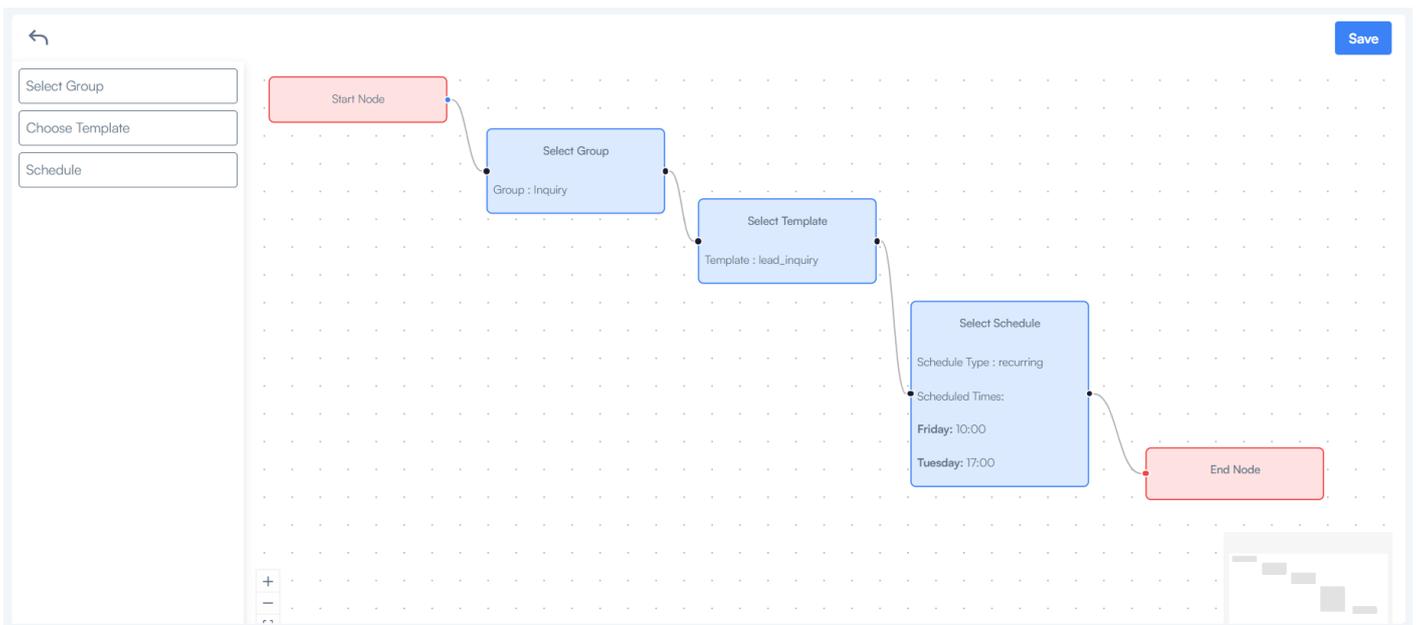
### 1. Single Send Campaign

- Used to send a one-time broadcast message to a selected group.
- Ideal for promotions, announcements, or immediate updates.



## 1. Multi-Send Campaign

- Designed to **schedule campaigns** that run repeatedly based on a defined schedule.
- Perfect for regular updates, reminders, or periodic promotional messages.



# Key Features

## 1. Drag-and-Drop Campaign Designer

- Build and customize campaigns easily with an intuitive drag-and-drop interface.
- No coding skills required—anyone can design and launch a campaign in minutes.

## 2. Template Integration

- Attach **pre-approved templates** to campaigns for fast and compliant messaging.
- Choose from **Marketing, Utility, or vSecure** templates depending on the campaign goal.

### 3. **Dynamic Group Targeting**

- Send messages to **specific groups** created in the Contacts Module.
- Leverage **dynamic segmentation** to ensure targeted and relevant broadcasts.

### 4. **Scheduling Flexibility**

- Schedule campaigns to run **once** (Single Send) or **repeatedly** (Multi-Send) based on your business needs.
  - Automate recurring campaigns to save time and maintain consistency.
- 

## How to Launch a Campaign

### 1. **Design the Campaign:**

- Use the drag-and-drop interface to create your campaign flow.

### 2. **Attach a Template:**

- Select a pre-approved template to use as the message content.

### 3. **Choose the Target Group:**

- Select the group of users to whom the broadcast will be sent.

### 4. **Set the Schedule:**

- For **Single Send**, define the date and time for a one-time broadcast.
- For **Multi-Send**, set up a schedule for recurring broadcasts.

### 5. **Launch and Monitor:**

- Launch the campaign and track its delivery and engagement metrics.
- 

## Benefits of vCX Campaigns

- **Scalable Outreach:** Send messages to a large number of users with ease.
  - **Targeted Messaging:** Leverage group segmentation to ensure relevance and higher engagement.
  - **Efficiency:** Automate recurring broadcasts with Multi-Send campaigns.
  - **Quick Deployment:** Attach pre-approved templates for fast and compliant communication.
  - **User-Friendly Design:** Create campaigns effortlessly with the drag-and-drop interface.
- 

The **Campaigns Module** in vCX empowers businesses to reach the right audience at the right time with the right message, ensuring seamless and scalable communication.

# Product

in vCX a product can be a physical product that you sell or a service that you offer. The section is neatly designed to create, upload or push your products into vCX and then being managed by META or Google Catalogs. These catalogs can then be sent to your customers on demand or via broadcast

# Order

Like product, an order can be an order for a product purchased, a subscription registration, a meal, or an appointment. Order view can be changed into order view or calendar view based on your business. Orders cannot be created, but can be pushed into the system. Updates to products can be made from the system and can be sent to systems outside vCX or automations can be configured

# Order / Service / Appointment

The **Order / Service / Appointment Module** in vCX provides a centralized view of all your external orders, services, and appointments. This feature ensures businesses can seamlessly track, manage, and act on these records without switching systems, enabling faster and smarter workflows.



The screenshot displays the 'Orders' module interface. At the top, there is a search bar labeled 'Search orders...'. Below it, a filter bar shows 'Orders Per Page: 20' and a status filter set to 'All'. The main table lists orders with the following columns: Order ID, Customer Name, Total Amount, Order Date, Delivery Date, Special Instruction, Status, and Actions. The table contains seven rows of data, each with a checkbox on the left and a status dropdown menu on the right.

Order ID	Customer Name	Total Amount	Order Date	Delivery Date	Special Instruction	Status	Actions
1HwyFD4U	Lijo Mathew	100.00	11/12/2024, 5:29:31 PM		computed: [object Object], stale: , id: 1, createdAt: 2024-11-	Approved	<a href="#">Edit</a> <a href="#">Delete</a>
25A8DTHz	Dr Ashadeep Chandrareddy	100.00	11/11/2024, 7:12:56 PM		createdAt: 2024-11-06T06:47:21.720Z, updatedAt:	Approved	<a href="#">Edit</a> <a href="#">Delete</a>
4a30JrN3	Mallika Sridhar	100.00	11/14/2024, 10:05:23 AM		createdAt: 2024-11-14T04:23:33.659Z, updatedAt:	Pending	<a href="#">Edit</a> <a href="#">Delete</a>
4Rn8ZQys	Anjali	100.00	11/11/2024, 7:11:47 PM		createdAt: 2024-11-06T06:47:21.720Z, updatedAt:	Approved	<a href="#">Edit</a> <a href="#">Delete</a>
5ZXTTVt8	Jayanna	100.00	11/13/2024, 10:10:06 AM		createdAt: 2024-11-12T13:03:04.618Z, updatedAt:	Approved	<a href="#">Edit</a> <a href="#">Delete</a>
BHNEInbf	Spoorthi B S	100.00	11/13/2024, 1:11:03 PM		createdAt: 2024-11-13T06:55:12.648Z, updatedAt:	Approved	<a href="#">Edit</a> <a href="#">Delete</a>

## Key Features

### 1. Centralized Visibility

- View all your **Orders**, **Services**, and **Appointments** in one place for better management.
- Integrate external systems to pull in relevant data directly into vCX.

### 2. Actionable Workflows

- Perform key actions, such as sending updates or notifications, directly within vCX.
- Push actions back to external systems if needed, ensuring continuity across platforms.

### 3. Dynamic Group Creation

- Use orders, services, or appointments as parameters to create **dynamic groups**.
- These groups can be used to send targeted broadcast messages or campaigns.

- Example: Send appointment reminders or promotional campaigns to customers with recent purchases.

#### 4. **Seamless Integration**

- Integrate with your external CRM, booking, or order management systems to sync and manage real-time data.
- 

## How It Works

### 1. **Import and Sync:**

- Pull orders, services, or appointments from your external systems into vCX.

### 2. **Track and Manage:**

- Get a clear, organized view of all records.
- Perform actions like sending confirmations, follow-ups, or reminders.

### 3. **Create Dynamic Groups:**

- Segment contacts based on order, service, or appointment status.
- Use these groups for targeted **broadcasts** or **campaigns**.

### 4. **Push Actions to External Systems:**

- Update external platforms with actions taken in vCX, ensuring all systems remain in sync.
- 

## Benefits of the Order / Service / Appointment Module

- **Streamlined Management:** Consolidate all external records into a single, unified interface.
  - **Improved Efficiency:** Perform actions directly within vCX without switching between systems.
  - **Targeted Campaigns:** Leverage dynamic groups for smarter, data-driven communication.
  - **Enhanced Integration:** Sync and update records seamlessly across external platforms.
  - **Greater Control:** Track and act on orders, services, and appointments efficiently.
- 

The **Order / Service / Appointment Module** simplifies record management and ensures businesses can take timely, targeted actions to engage customers, drive operations, and enhance overall efficiency.

# Settings

The control center of vCX is the Settings panel. It houses your profile as a user. As an administrator or user with privileges you may see My Company and My Plan

My Plan hosts a variety of settings including integrations, add-ons, configurations, billing etc.

# Customizing your Webchat CSS

To customize your webchat CSS

- Go to MyPlan -> Settings

The screenshot shows a 'Plan Usage' dashboard with a blue header bar containing 'Current Plan: Starter | Renewal Date: No End Date'. Below the header, there are eight usage cards arranged in a 2x4 grid. Each card has an icon, a title, a current value, a total value, and a progress bar. The 'Integrations' card is highlighted in yellow.

Resource	Current Value	Total Value
Users	1	1
Contacts	0	100
Catalog	0	0
Messages	0	N/A
File Storage	0 MB	50 MB
Integrations	2	4
Configurations	4	8
Add-ons	2	4

- Select Bot Integrations

The screenshot shows an 'Integrations' page with a search bar at the top. Below the search bar, there are five integration cards. The 'Bot Integration' card is highlighted in yellow. Each card has an icon, a title, a status message, and a button to view details or connect.

Integration	Status	Action
WhatsApp Integration	Connected	Show Details
Webchat Integration	Not Connected	Show Details
Bot Integration	Connected	Show Details
Instagram	Manual (Not Connected)	Connect
Telegram Integration	Coming Soon	Coming Soon Details

- Select Web Chat

### Select Integration

Currently integrated with Bot

WhatsApp

Web Chat

Instagram

Telegram

---

**WhatsApp Webhook URL**

**WhatsApp Webhook secret**

---

**Additional Webhook URL (Optional)**

**Additional Webhook secret (Optional)**

Edit & Save

```
await axios.post(
  'https://webhook.versal.one/c1ffaa7e-e435-4bfe-a941-2eb2af6f3fa2',
  {
    responsefrom: 'Bot',
    conversation: outgoingEvent,
    phonenumber: <users whatsapp number> # change this with the variable that contains users phone number
  },
  {
    headers: {
      'X-Secret': '2eb2af6f3fa2'
```

- Enter the values

### Select Integration

Currently integrated with Bot

WhatsApp

Web Chat

Instagram

Telegram

---

**headerTitle**

**clientLogo**

**clientName**

**contactDetails**

**chatPoweredBy**

Powered by Google

<https://fs.dashboard.chatmate.co.il/media/c1ffaa7e-e435-4bfe-a941-2eb2af6f3fa2/config/1733731676031-867554>

clientName

Lokesh R

contactDetails

lokesh@versalence.ai

chatPoweredBy

⚡ Powered by Google

PoweredBy

Google

Language

Select Language ▾ Add Language

Current Languages: EN,HB

Botpress webhook path :

<https://files.bpcontent.cloud/2024/10/22/09/20241022093854-FT82HHIM.js>

Web Chat Style Sheet (CSS):

Choose File No file chosen

Edit & Save

- After entering the botpress js link, click Edit & Save. This generates the Webchat link

Botpress webhook path :

<https://files.bpcontent.cloud/2024/10/22/09/20241022093854-FT82HHIM.js>

Web Chat Style Sheet (CSS):

Choose File No file chosen

Edit & Save

```
<script type="module" src="https://fs.dashboard.chatmate.co.il/media/c1ffaa7e-e435-4bfe-a941-2eb2af6f3fa2/config/2eb2af6f3fa2_config.js"></script>
```

- Open the link in a browser to reveal the details of the .js file

fs.dashboard.chatmate.co.il/media/c1ffaa7e-e435-4bfe-a941-2eb2af6f3fa2/config/2eb2af6f3fa2\_config.js

```
const config = {"headerTitle":"Lokesh R","clientLogo":"https://fs.dashboard.chatmate.co.il/media/c1ffaa7e-e435-4bfe-a941-2eb2af6f3fa2/config/1733731676031-867554289.jpg","clientName":"Lokesh R","contactDetails":"lokesh@versalence.ai","chatPoweredBy":"Powered by Google","PoweredBy":"Google","Language":"EN,HB","clientId":"c0834208-c636-4db1-9fd4-4b196225d4c5","uuid":"c1ffaa7e-e435-4bfe-a92eb2af6f3fa2","ServerURL":"https://chatapp.dashboard.chatmate.co.il"};

window.getConfig = () => config;

const link = document.createElement("link");
link.rel = "stylesheet";
link.href = "https://fs.dashboard.chatmate.co.il/chatconfig/chat-ui.css";
document.head.appendChild(link);

const script = document.createElement("script");
script.src = "https://fs.dashboard.chatmate.co.il/chatconfig/chatWidget.js";
document.head.appendChild(script);
;
```

- in the .js file, find the link to the CSS, open the link in a browser

← → ↻ fs.dashboard.chatmate.co.il/chatconfig/chat-ui.css

```
/* chat-ui.css */

:root {
  --header-bg: #005bb5;
  --bot-message-bg: #f9f9f9;
  --user-message-bg: #0078d7;
  --bot-text-color: #000;
  --user-text-color: #fff;
  --font-family: 'Segoe UI', Tahoma, sans-serif;
  --chat-border-radius: 10px;
  --chat-shadow: 0 4px 6px rgba(0, 0, 0, 0.1);
}

/* Container for chat window */
#chat-container {
  position: relative;
  width: 100%;
  height: 100vh;
}

/* General chat window styles */
#chat-window {
  display: none;
  position: fixed;
  bottom: 75px;
  right: 20px;
  width: 400px;
  height: 450px;
  background: #fff;
  border: 1px solid rgba(0, 0, 0, 0.1);
  border-radius: 5px;
  box-shadow: 0 4px 6px rgba(0, 0, 0, 0.1);
  display: flex;
  overflow-x: hidden; /* Disable horizontal scroll */
  overflow-y: auto; /* Allow vertical scrolling */
  max-width: 100%; /* Prevent overflow beyond container */
  flex-direction: column;
  z-index: 9999;
  /* direction: rtl; */
}

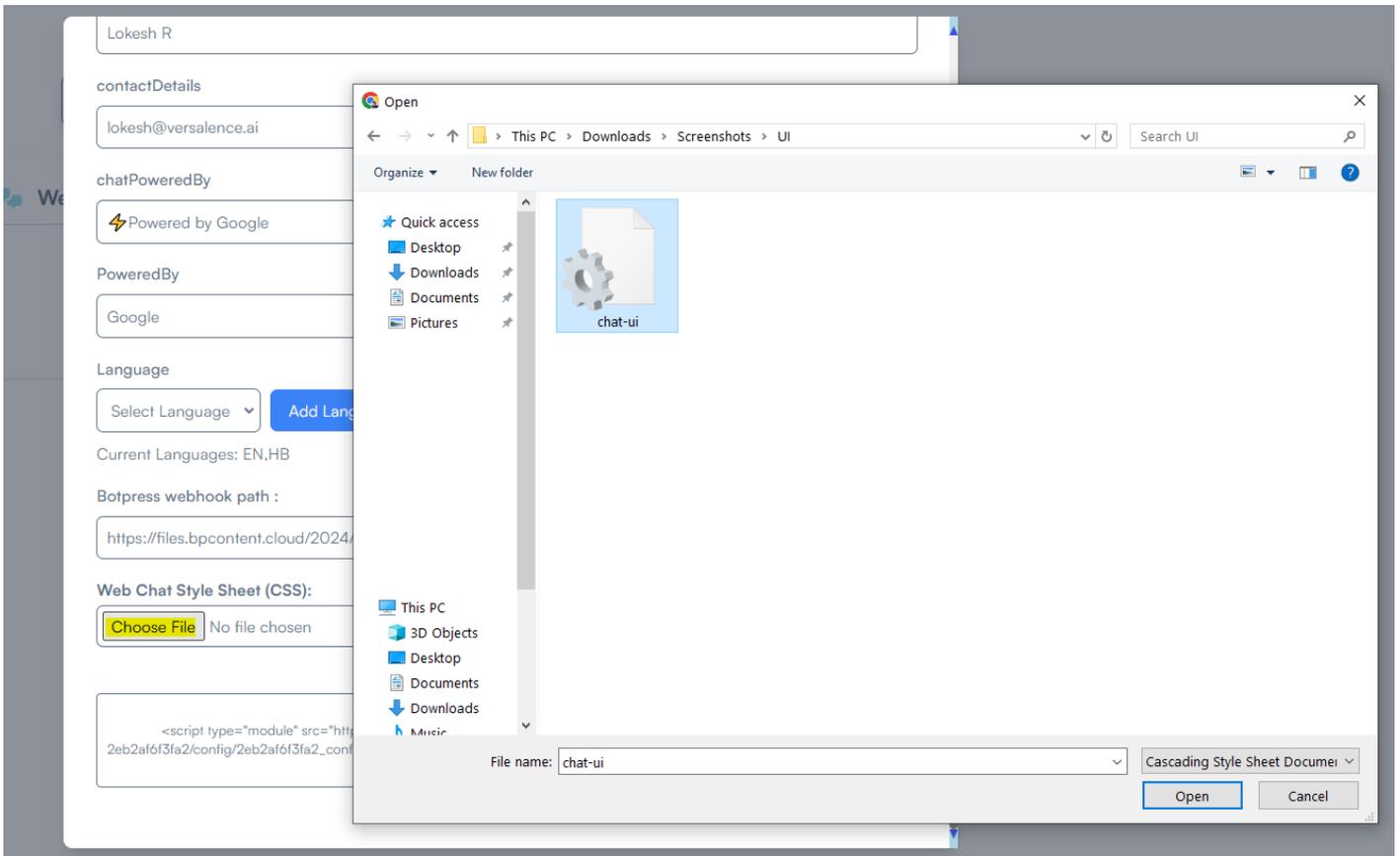
#chat-window[lang="en"] {
  direction: ltr;
}

#chat-window[lang="he"] {
  direction: rtl; /* Apply RTL when language is set to Hebrew */
}

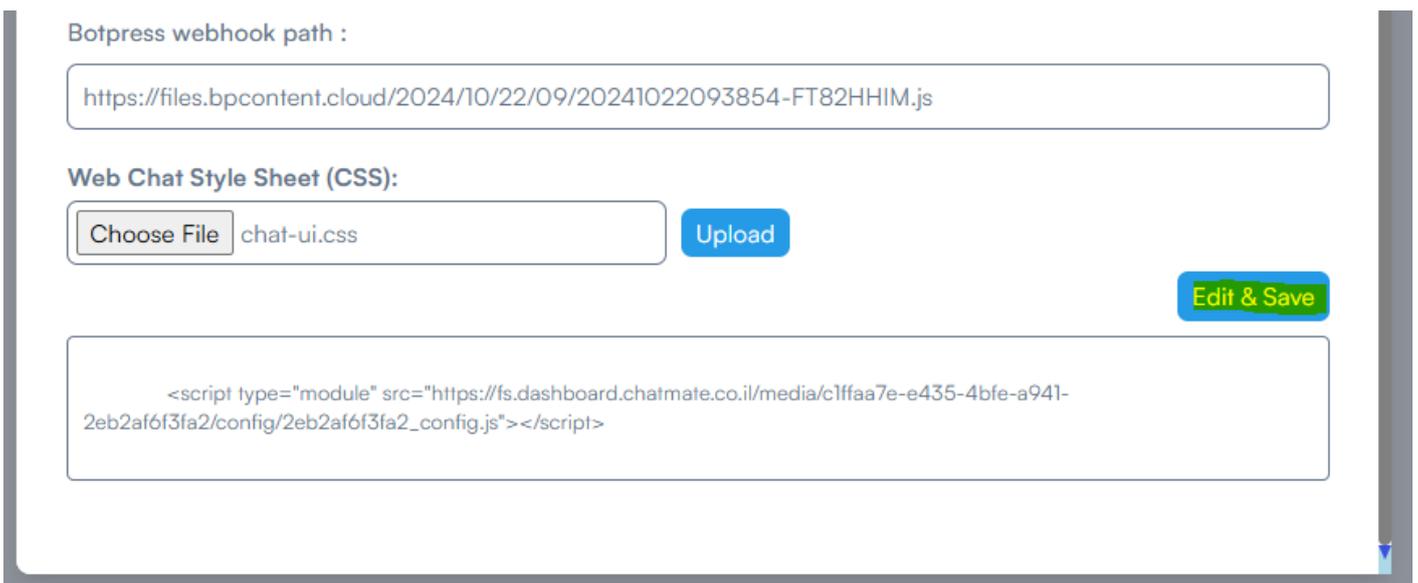
/* Default text for the send button */
#chat-send-button {
  display: inline-flex;
  align-items: center;
}
```

- Download the file or save it to your fav code editor to make required changes to your CSS

Once the changes are done - upload the file back



Click Edit&Save to apply your new CSS



Lokesh R

contactDetails

lokesh@versalence.ai

chatPoweredBy

⚡ Powered by Google

PoweredBy

Google

Language

Select Language

Current Languages: EN,HB

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Web Chat Style Sheet (CSS):

chat-ui.css

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<script type="module" src="https://fs.dashboard.chatmate.co.il/media/c1f7aa7e-e435-4bfe-a941-2eb2af6f3fa2/config/2eb2af6f3fa2_config.js"></script>
```