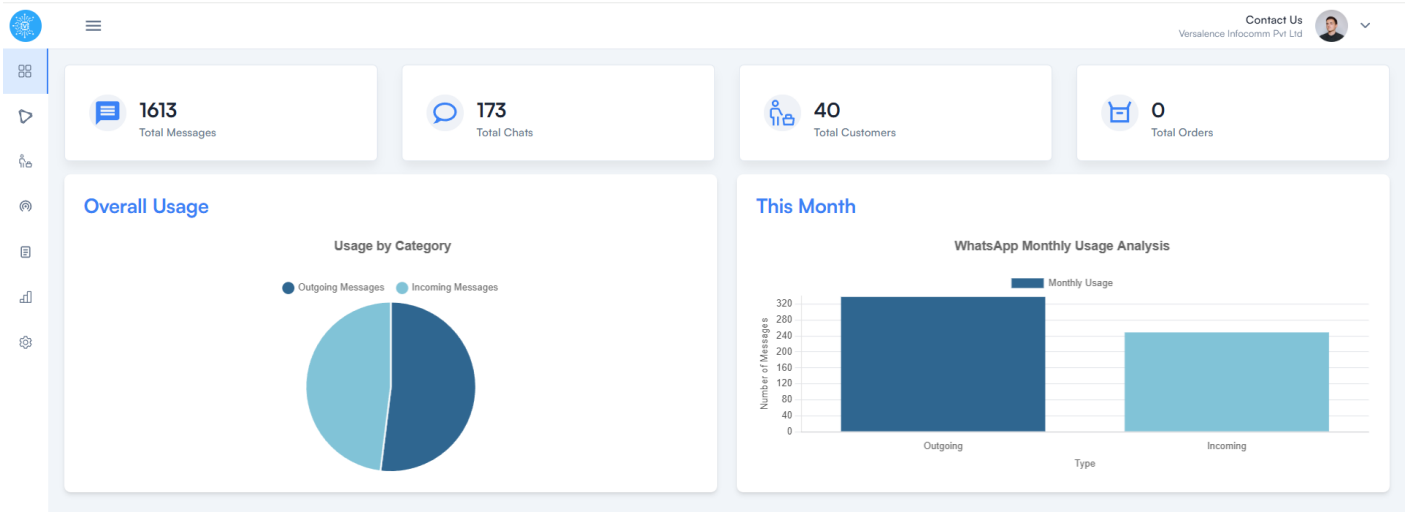
The Platform

This document covers details of how to use the platform

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

Dashboard

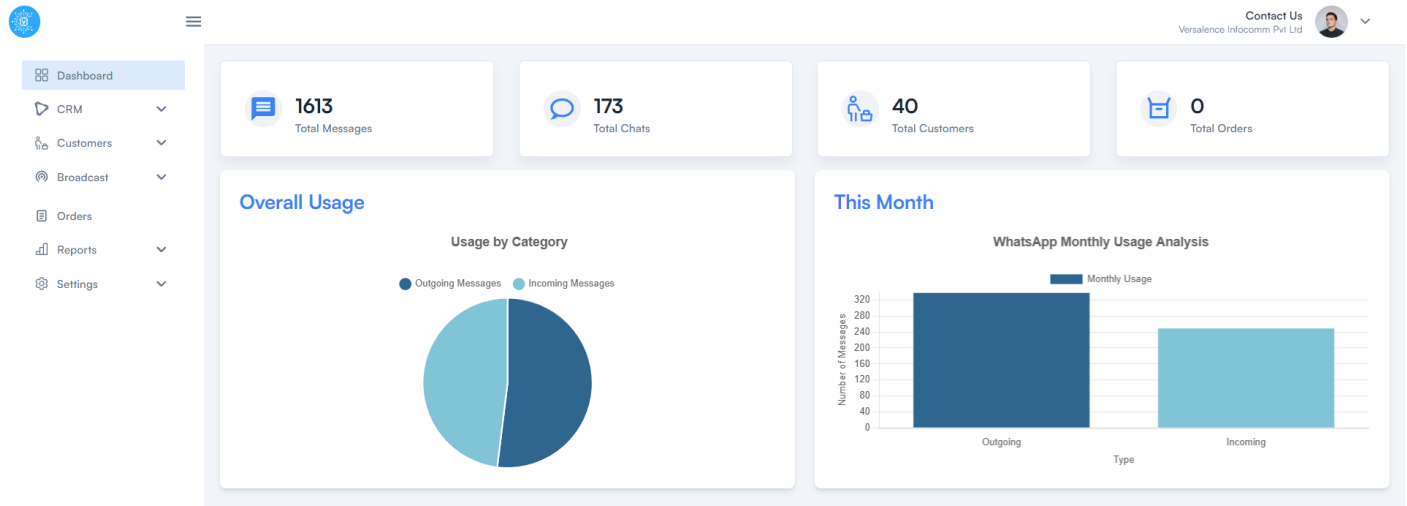


The landing page of the vCX platform is the dashboard.

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

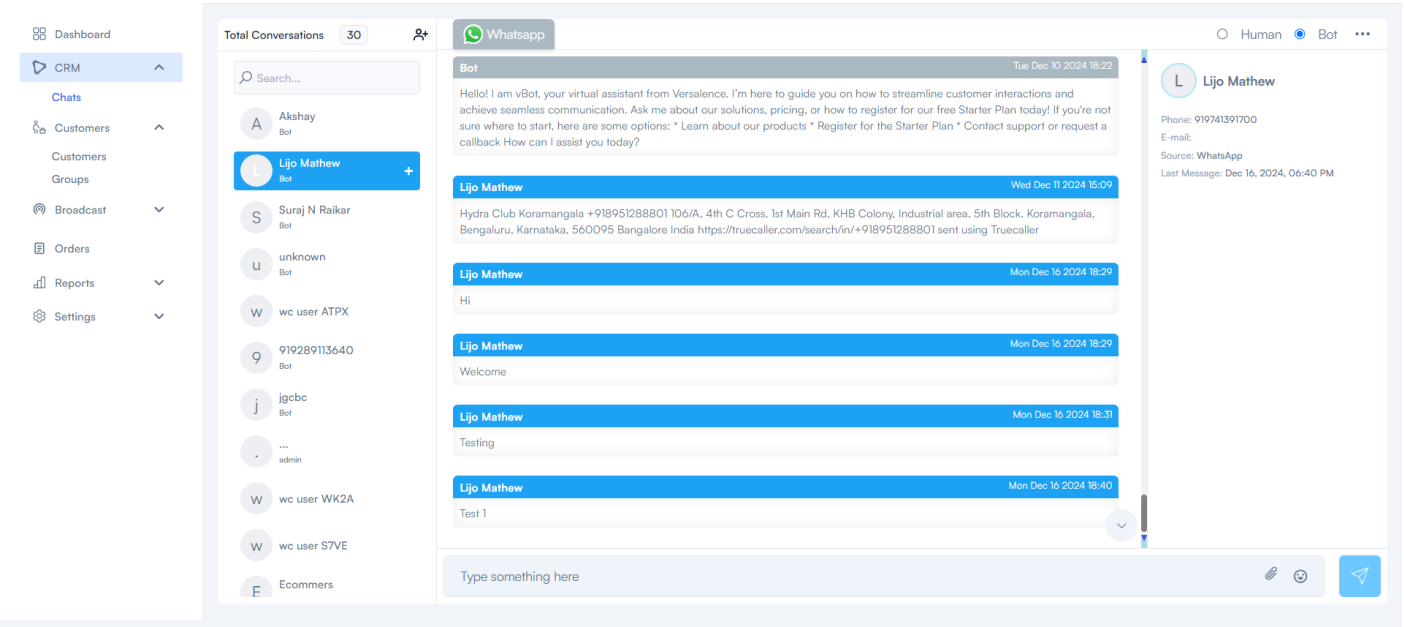


Customer Response Management - CRM

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.

Interacations

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.

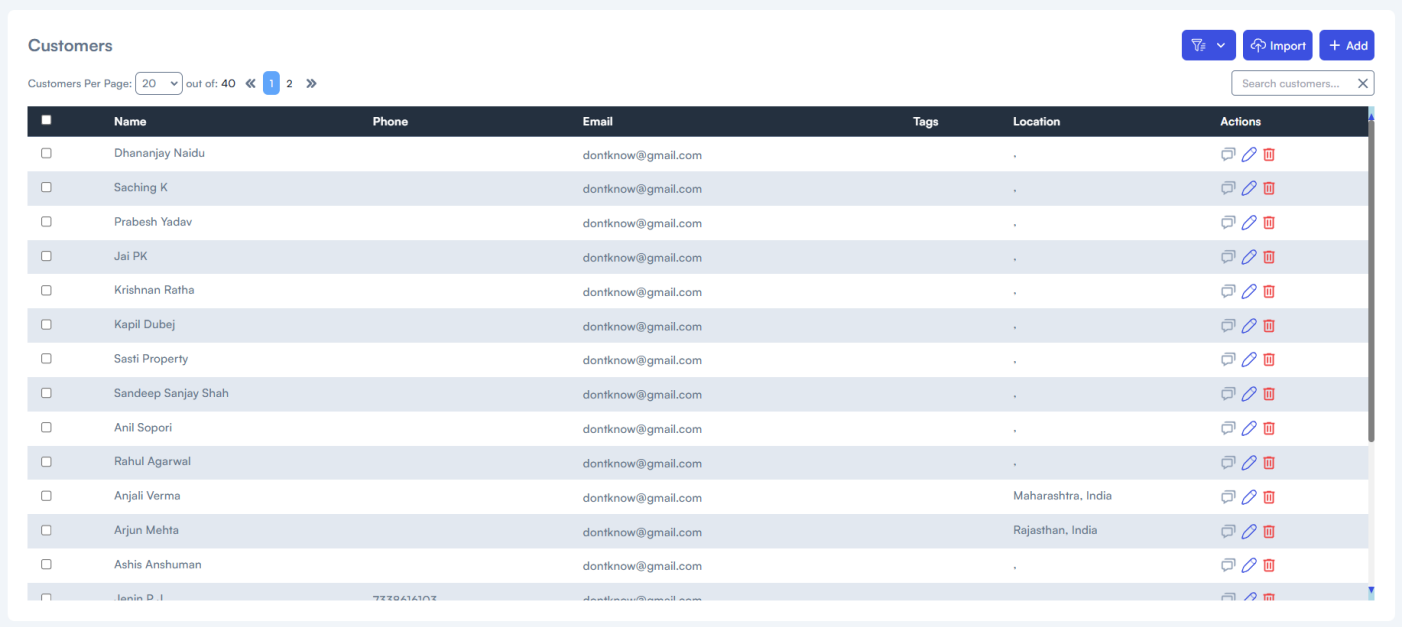
Contact Management

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.

Contact Management

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.



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.

Contact Management

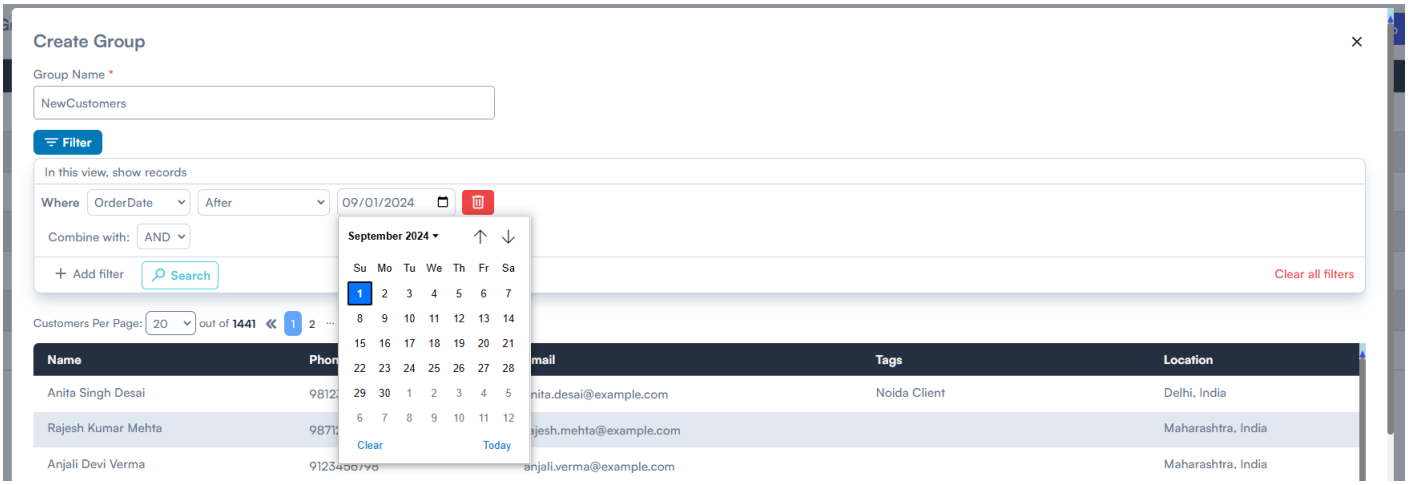
Groups aka Segments

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.

What are Groups?

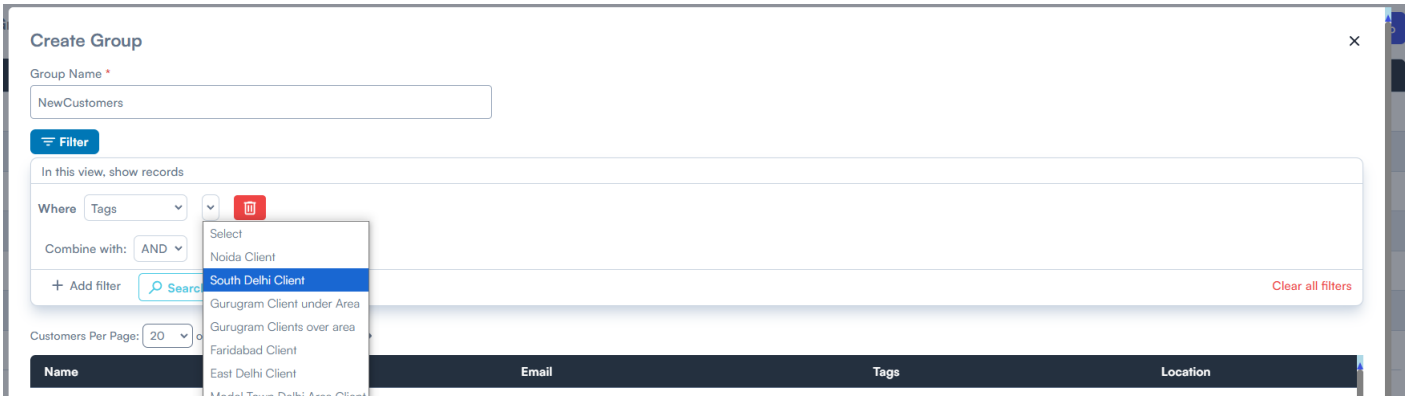
Groups allow you to **segment customers** based on multiple parameters, ensuring you always reach the right audience. These groups are **dynamic**, meaning they automatically update when customer information changes, ensuring your segmentation remains accurate and up-to-date.



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

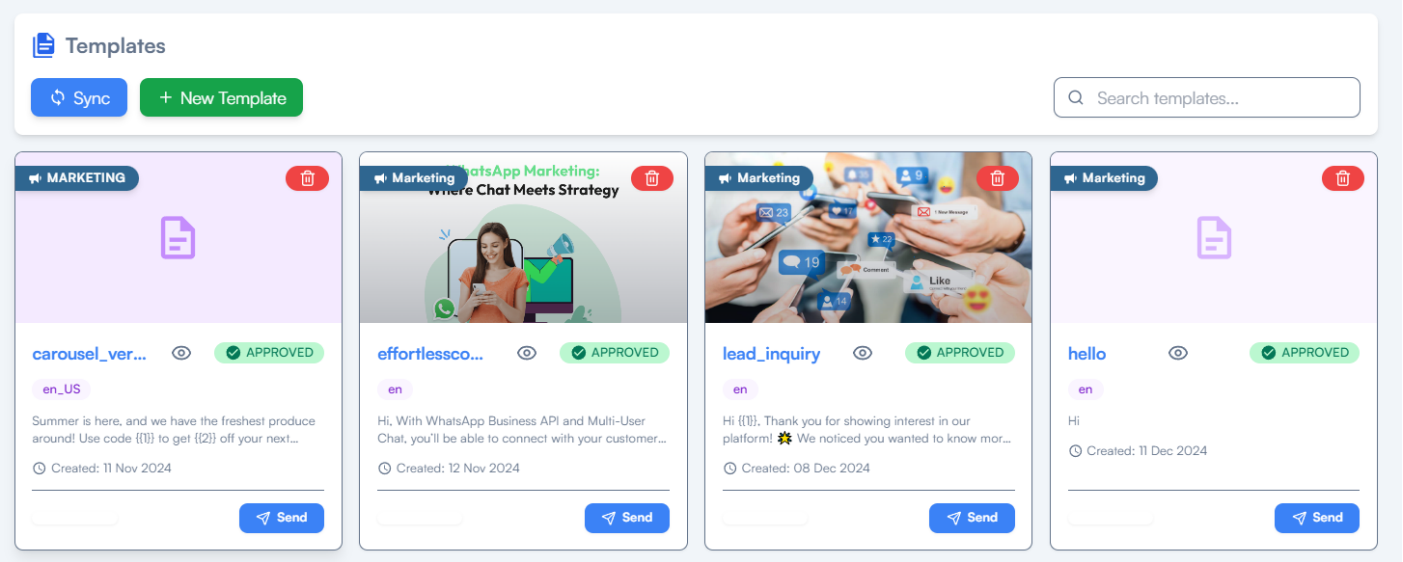
Broadcast takes communication with customers to a new level. This sections allows you to personalise your conversations, updates with meaningful templates from our "Template Library" and your own customized templates. Creating Campaigns is much easier with templates, contacts, products and orders

Broadcast

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?

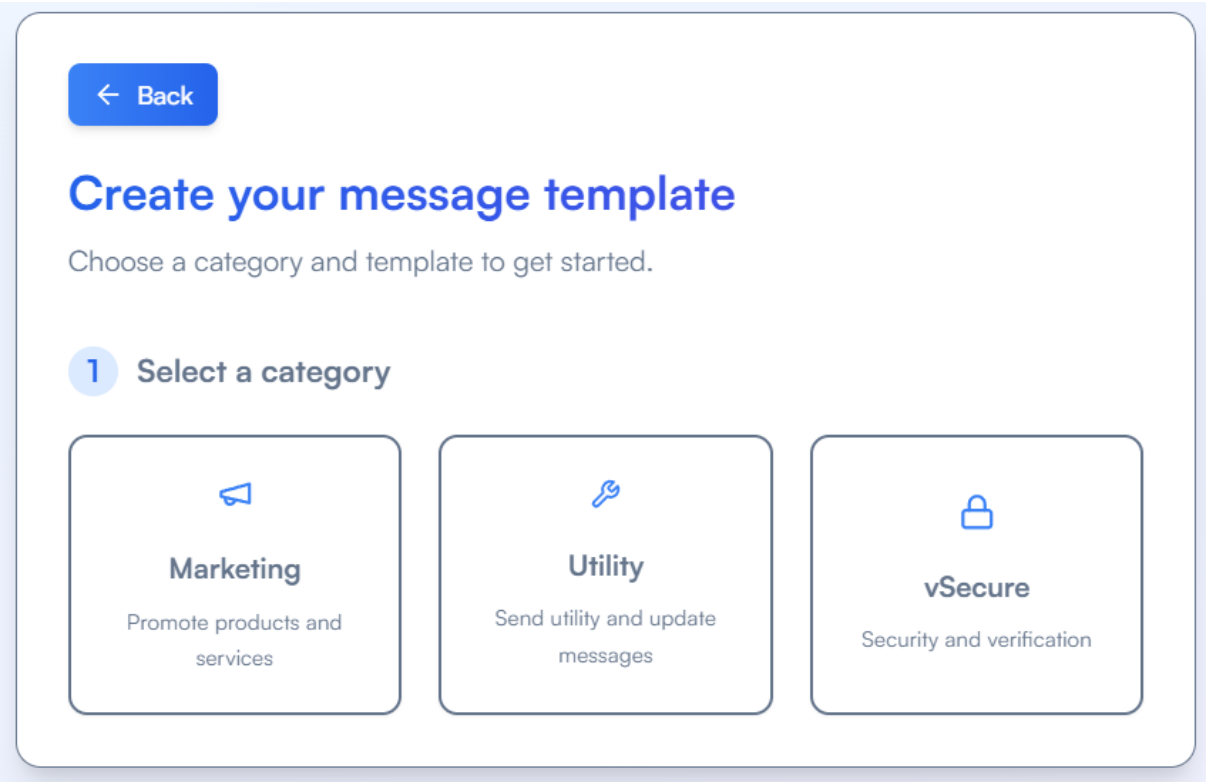
Templates are **pre-approved message formats**, currently available for **WhatsApp**, that help businesses engage with customers seamlessly. Whether you're sending updates, offers, or reminders, templates make communication faster and more efficient.

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.

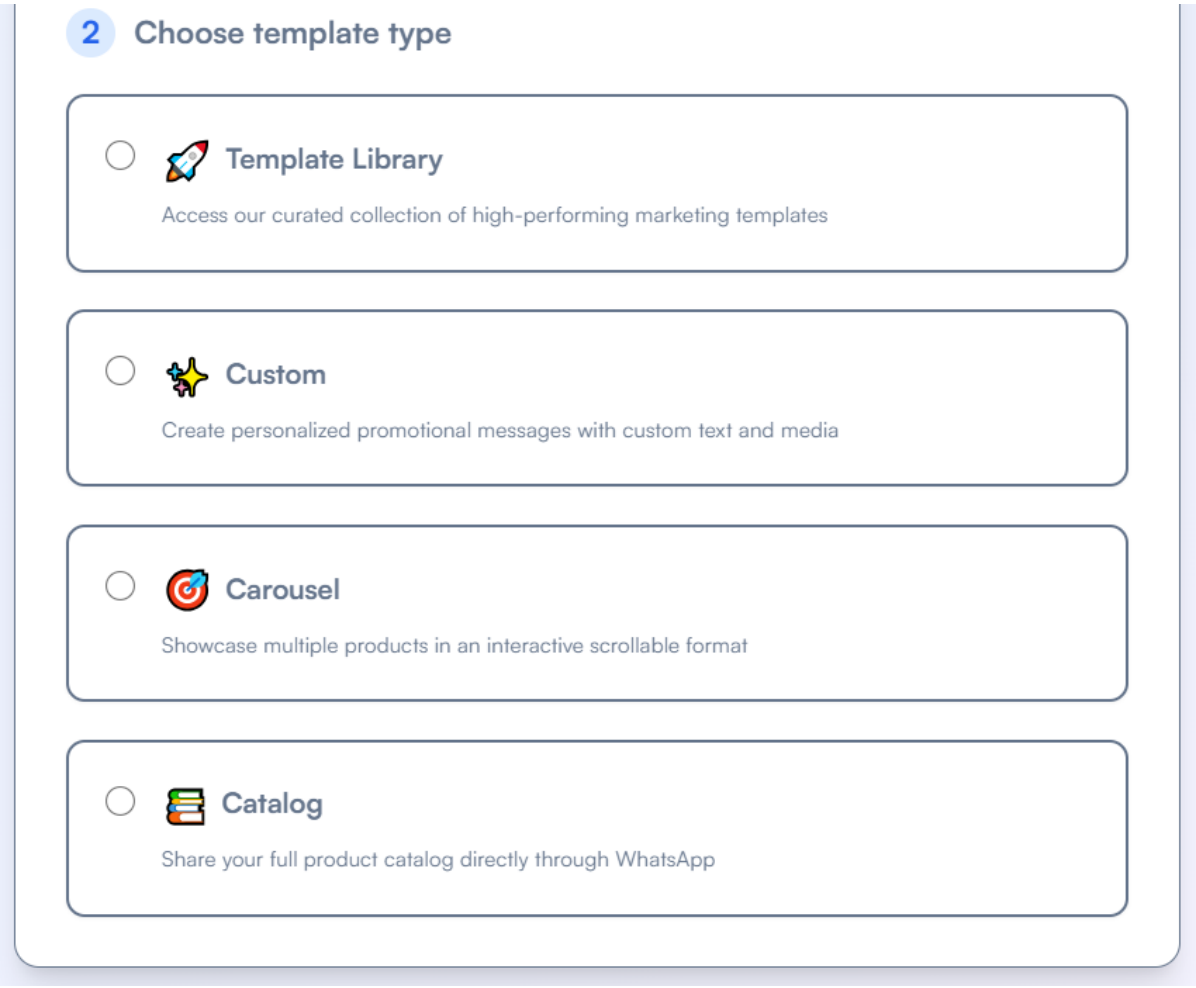
Templates Category



- **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



- **Library**: A collection of templates that are curated by industry and high performing. (coming soon)
- **Custom**: Create your own templates from scratch, controll 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 great way to share your products and services collection with your customers (coming soon)

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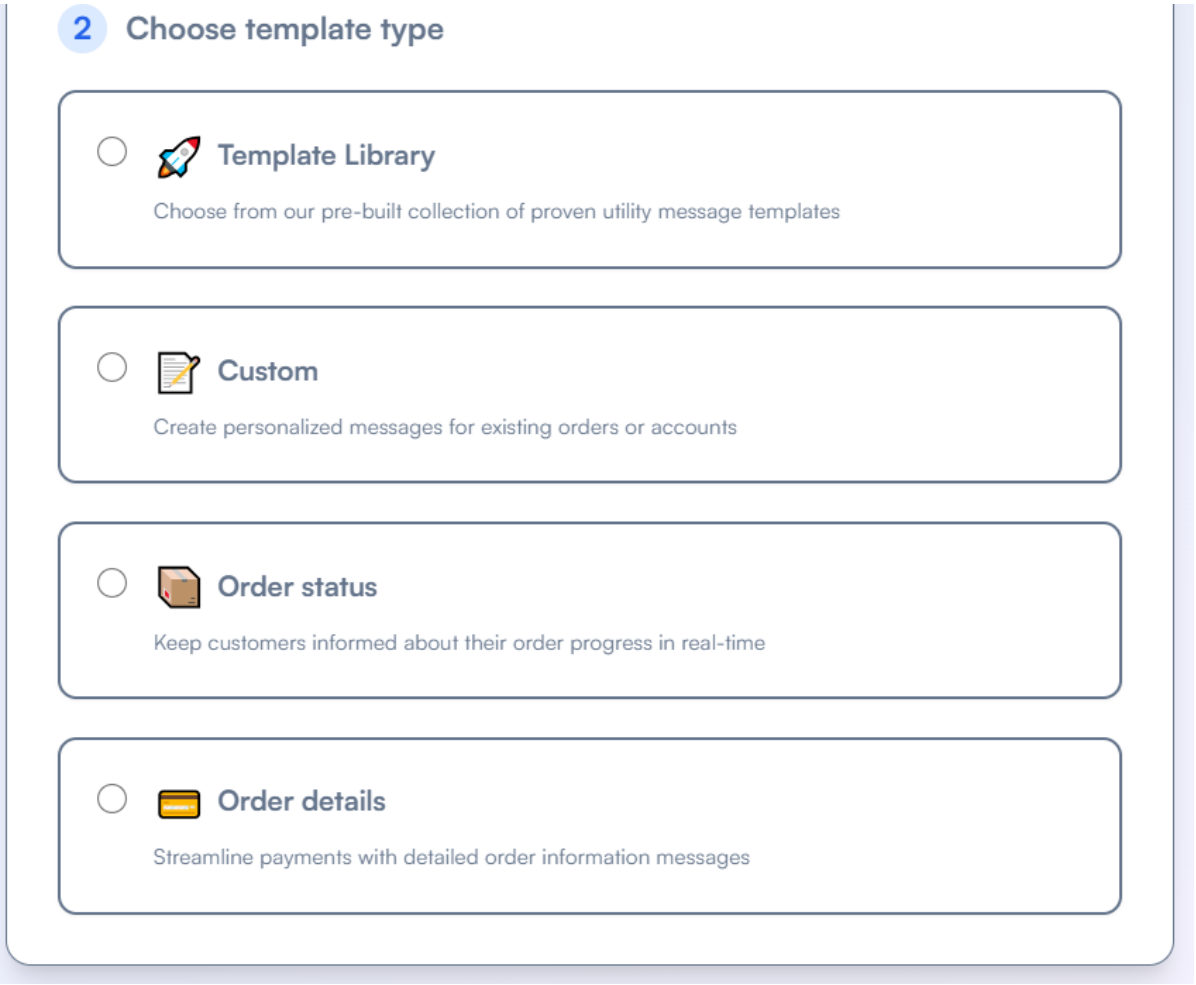
2. Utility Templates



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

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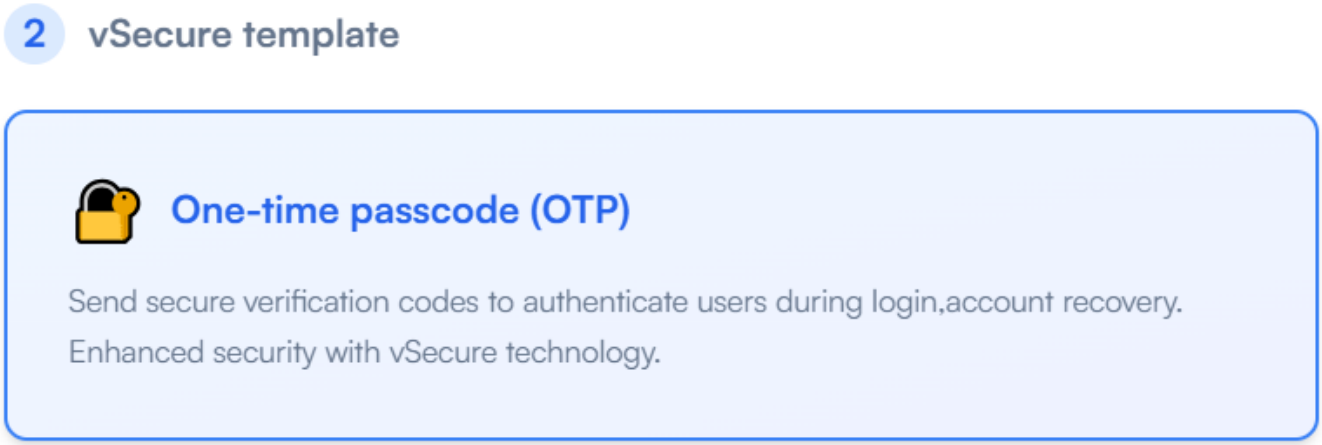
3. vSecure Templates



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

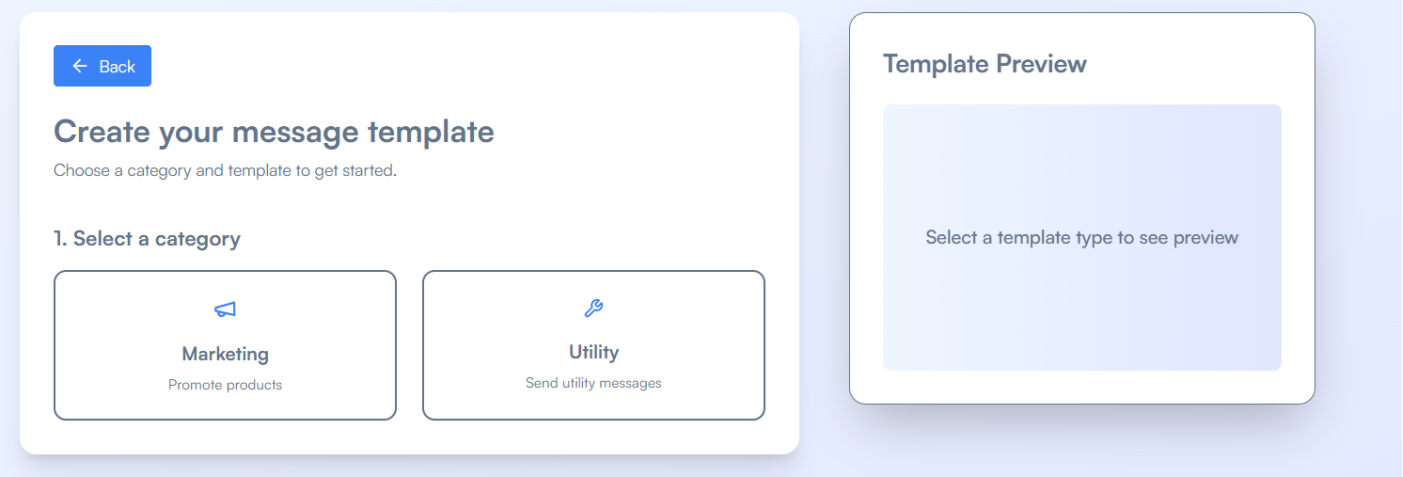
- Choose from a variety of professionally designed templates.
- Easily customize templates to match branding and tone.
- Deploy templates across **campaigns, chats, and multiple messaging channels**.

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

Create Template

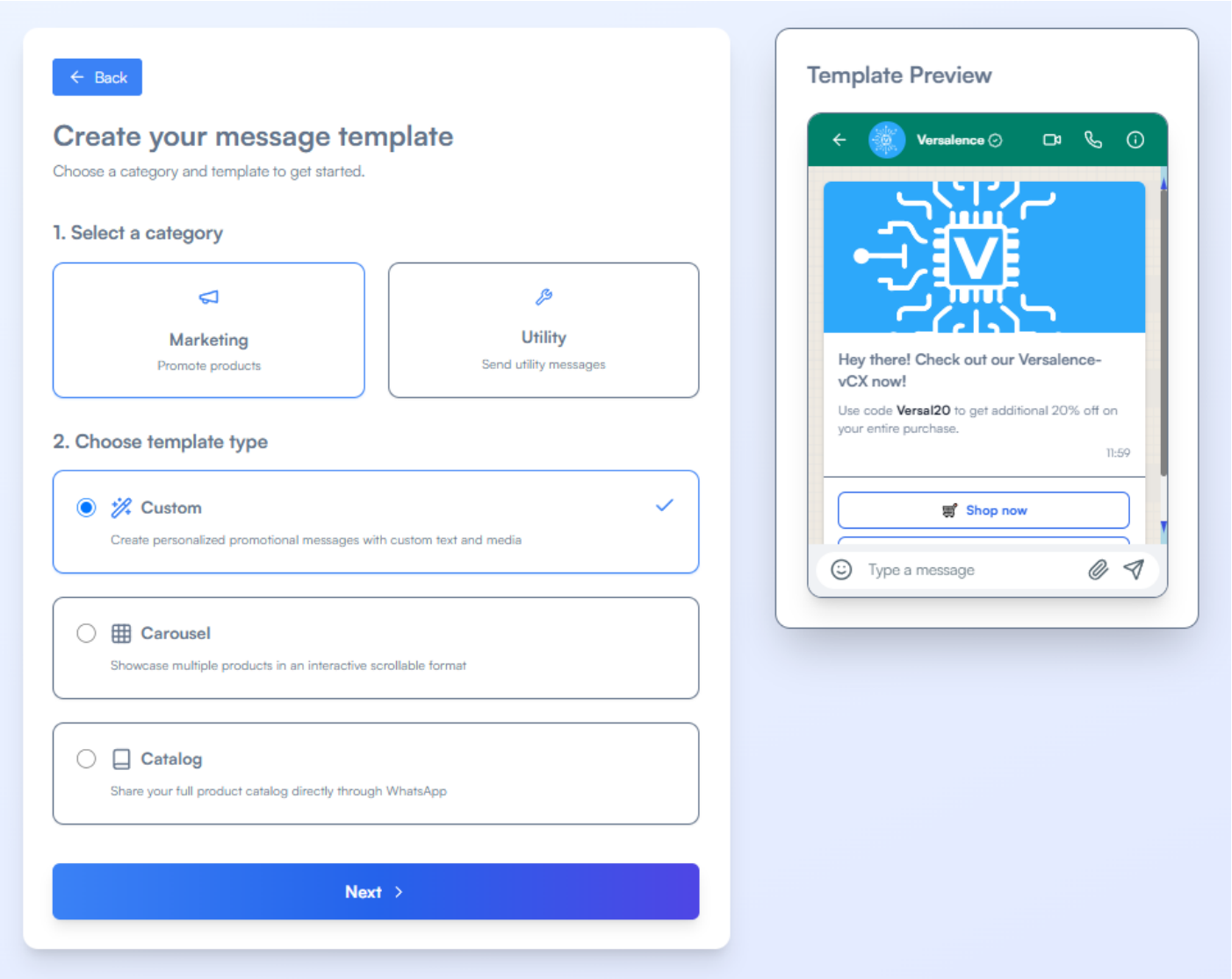
Template Creation

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

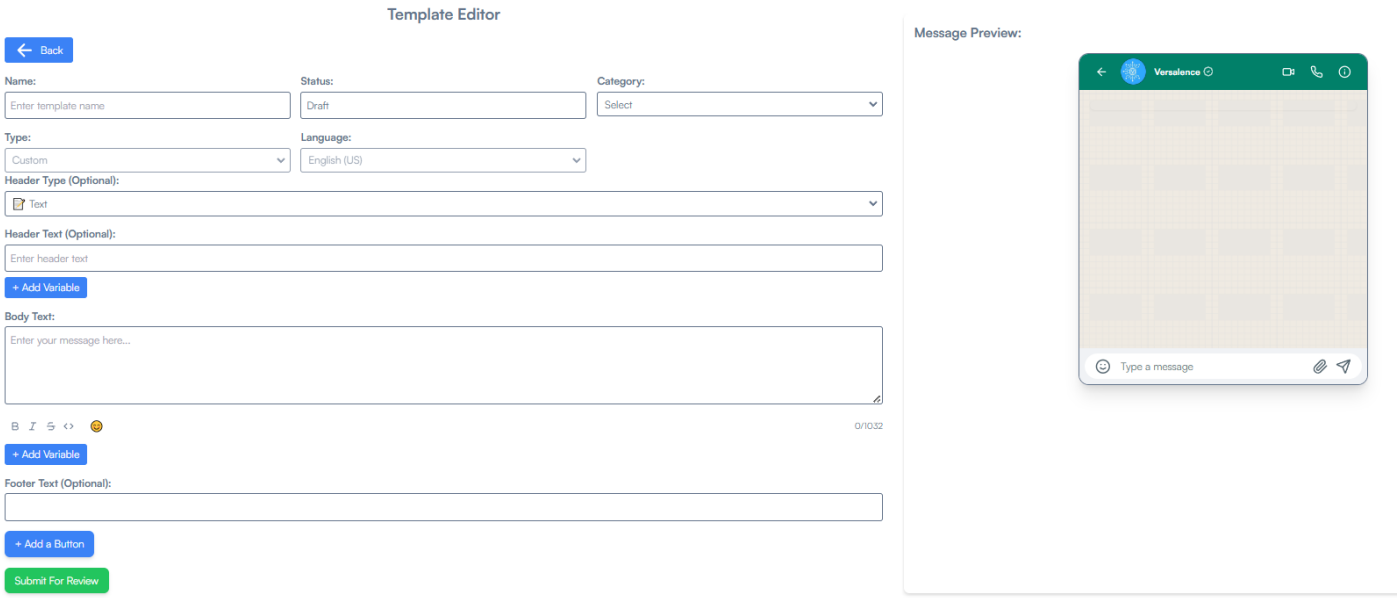
1. **Marketing Templates**
   - Used for **promotional messages**, offers, or campaigns.
   - Ideal for broadcasting and initiating customer engagement.
   - Example: "*Hi [Name], enjoy 25% off on your next purchase! Offer valid until this weekend. Shop now!*"
2. **Utility Templates**
   - Designed for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

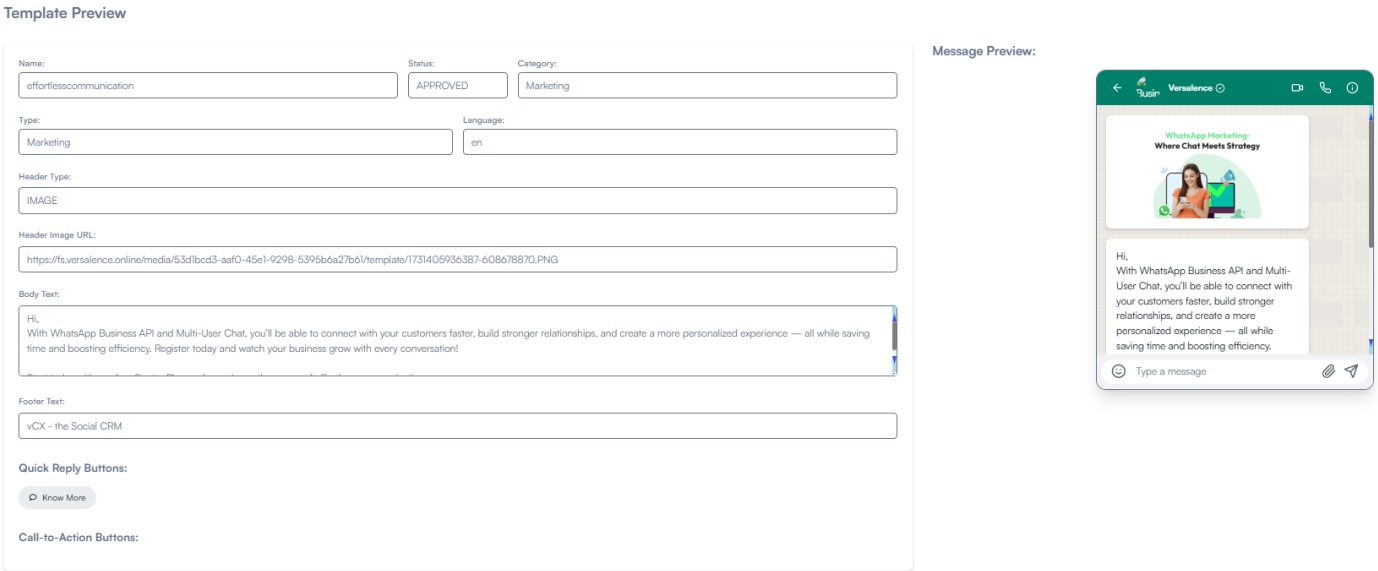
Templates are versatile and can be used across the vCX platform:

- **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.



How to Create a Template

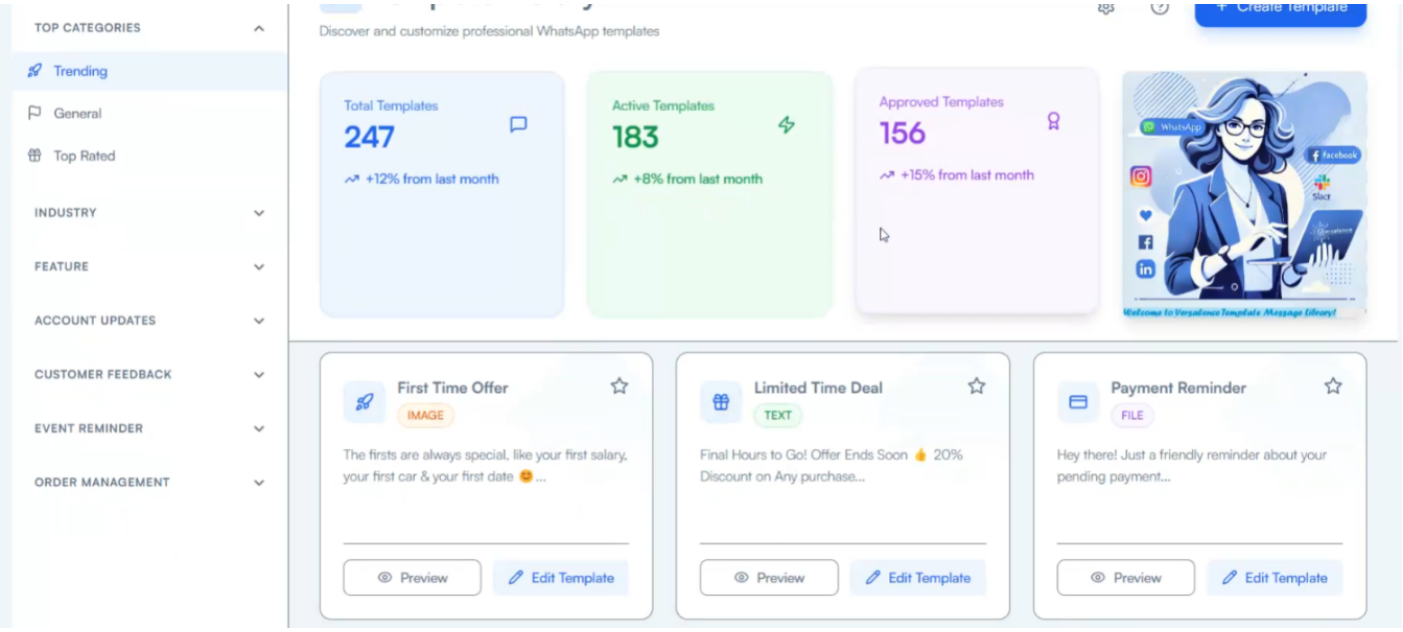
1. **Choose Template Category**:
   - Select from **Marketing**, **Utility**, or **vSecure**.
2. **Draft Content**:
   - Follow WhatsApp's content guidelines for clarity and compliance.
   - Include placeholders (e.g., `[Name]`, `[Order ID]`) to personalize messages.
3. **Submit for Approval**:
   - 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**.



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.

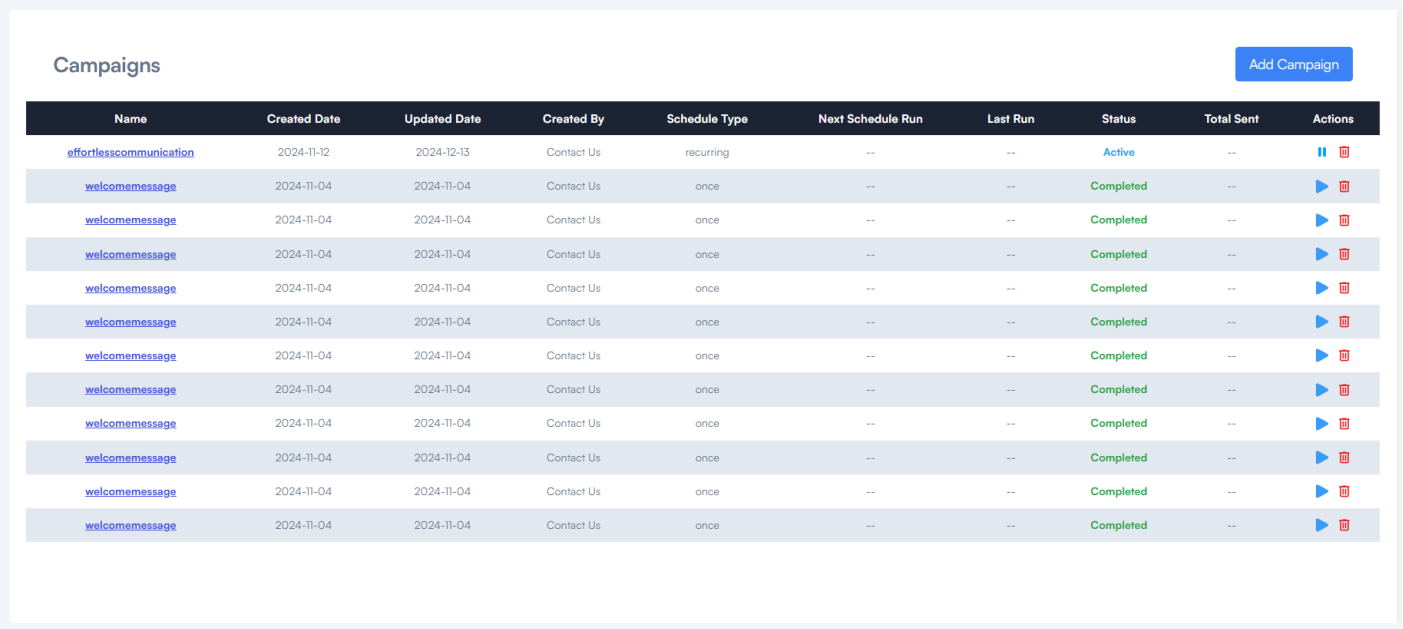
The **Template Creation** feature in vCX ensures you always have the right message ready—whether it’s for promotions, customer updates, or secure verifications—helping you drive engagement and build trust at scale.

Broadcast

Campaigns

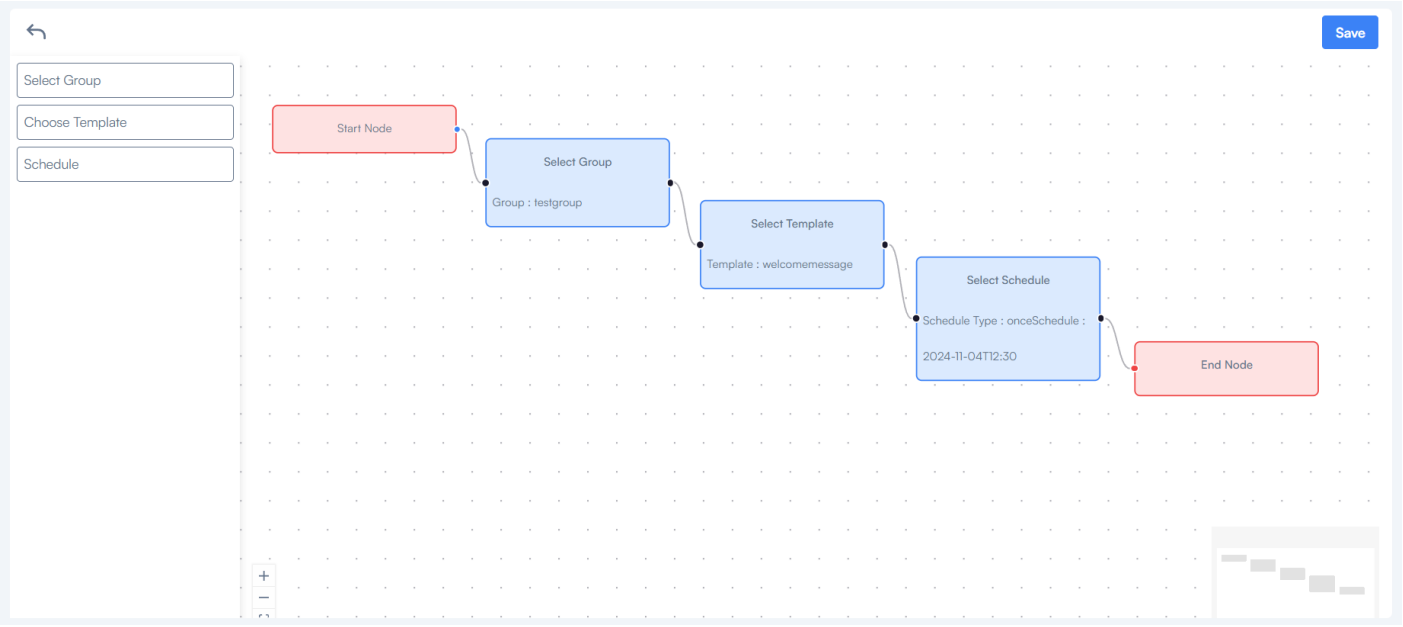
Campaigns

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.

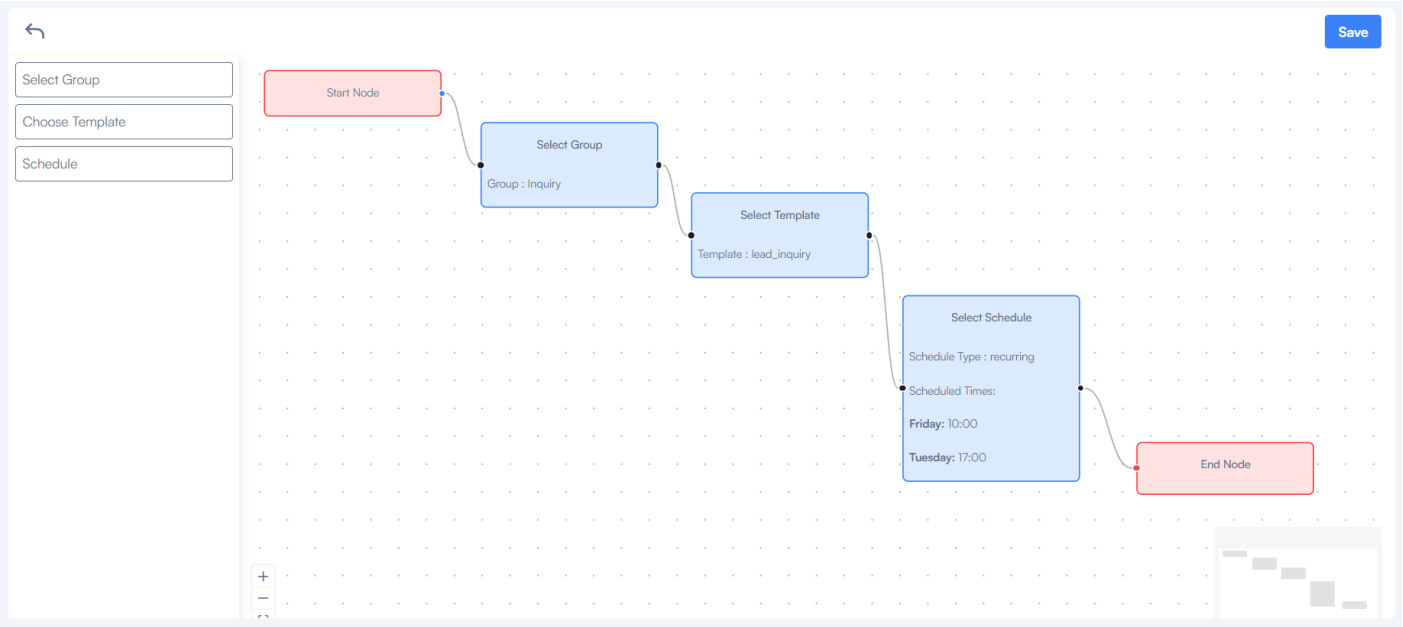


Types of Campaigns

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

Product

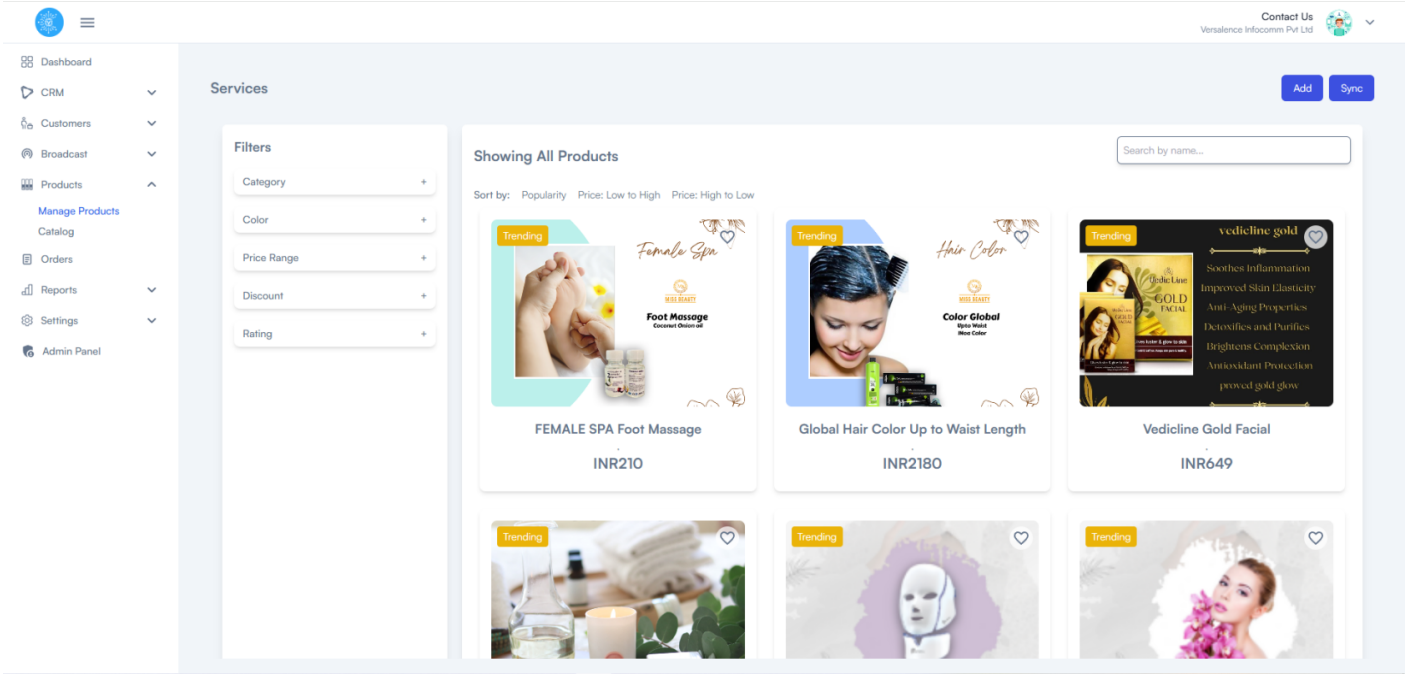
Manage Products

□□ Meta Commerce Integration with vCX – Manage Products Across Meta Platforms

Overview

vCX – The Social CRM now supports seamless integration with **Meta Commerce Manager**, enabling businesses to manage and publish their product catalogs across **Facebook**, **Instagram**, and **WhatsApp**—all from a single interface.

This feature empowers businesses to simplify their e-commerce operations by centralizing product management within the vCX **Products Page** and pushing those products directly to Meta's ecosystem. Whether you're showcasing a new service or launching a seasonal product line, your catalog is always up-to-date and accessible to your customers across Meta channels.



□□ What is Meta Commerce Manager?

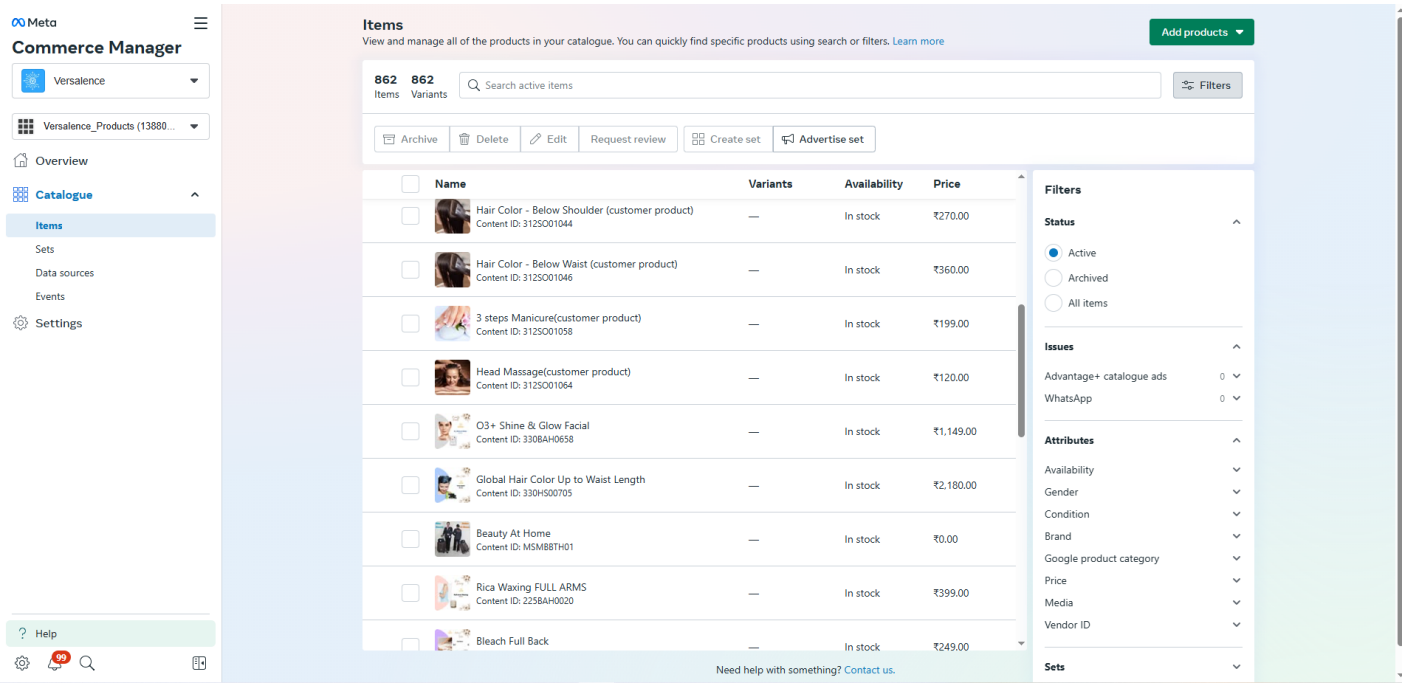
Meta Commerce Manager is a centralized tool provided by Meta within the **Meta Business Suite**. It allows businesses to:

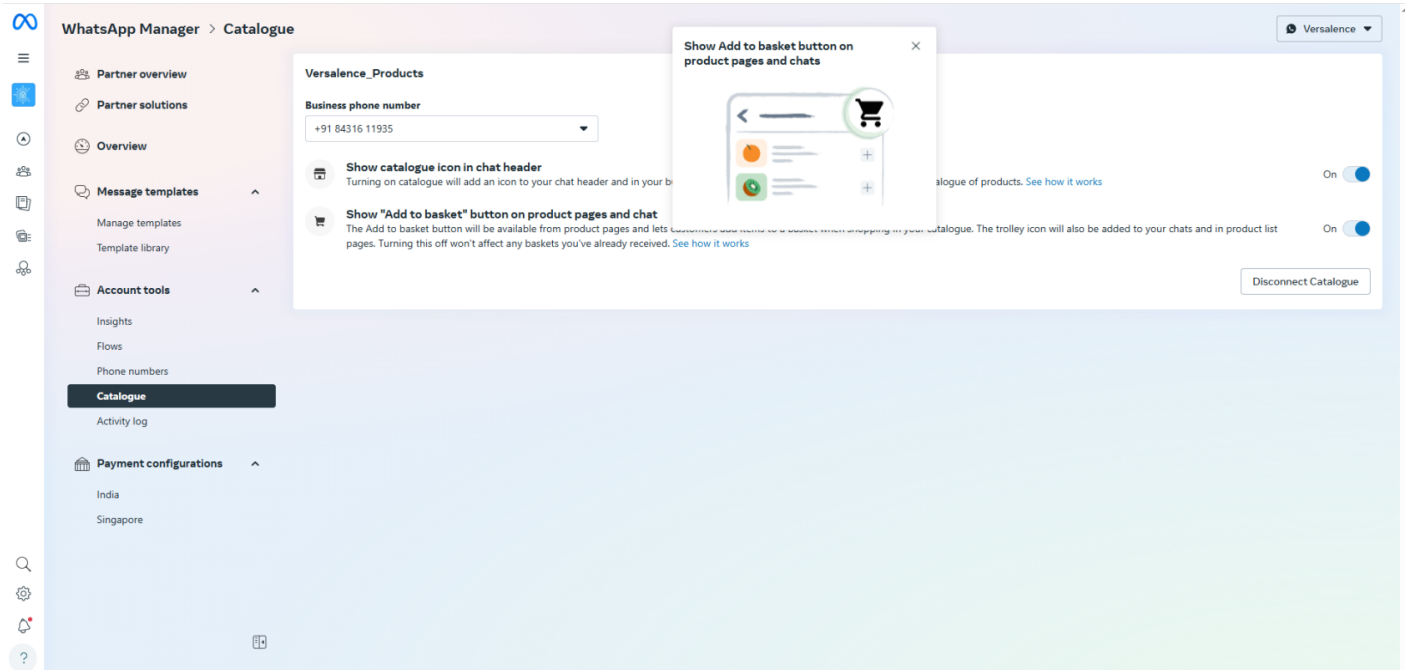
- Upload and manage product catalogs
- Create product sets for targeted advertising and browsing
- Enable shopping features across **Facebook Shop**, **Instagram Shop**, and **WhatsApp Catalog**
- Track performance and insights of product listings

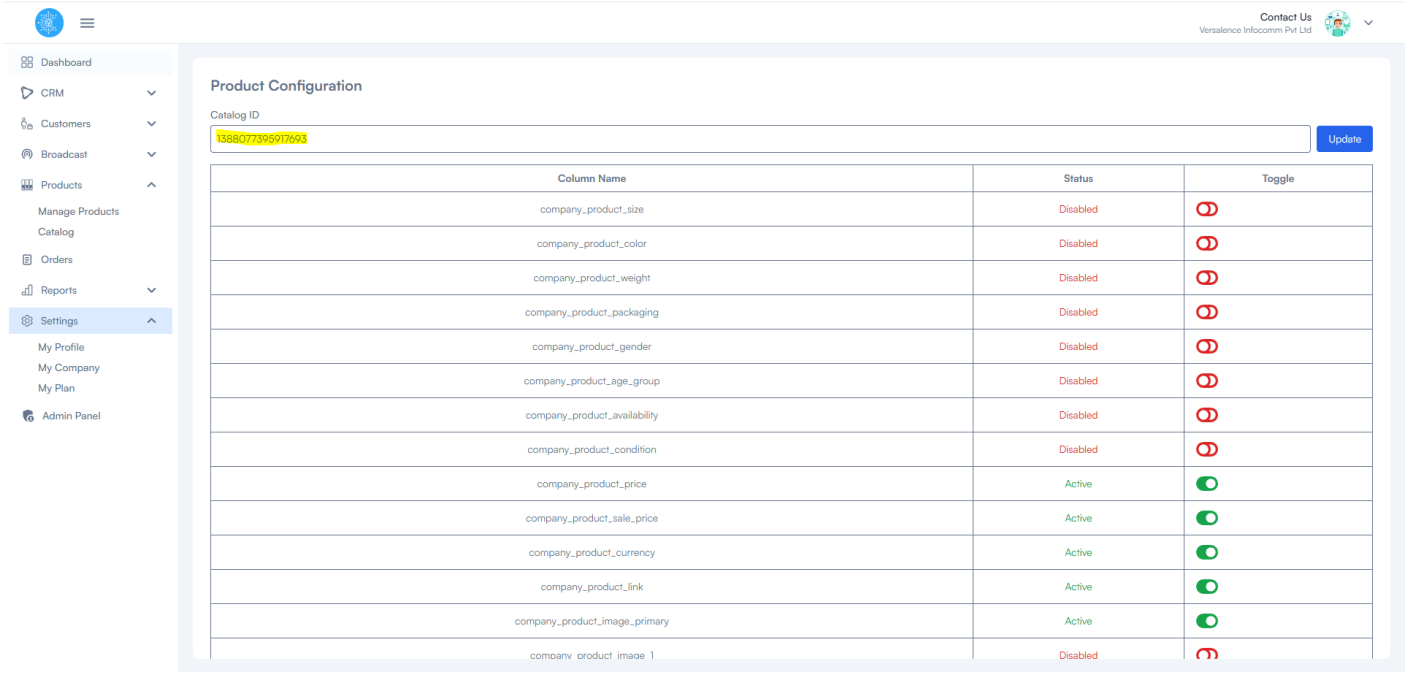
By integrating with Meta Commerce Manager, vCX extends your product visibility and reach directly to your audience where they are most active.

⚙ How It Works with vCX

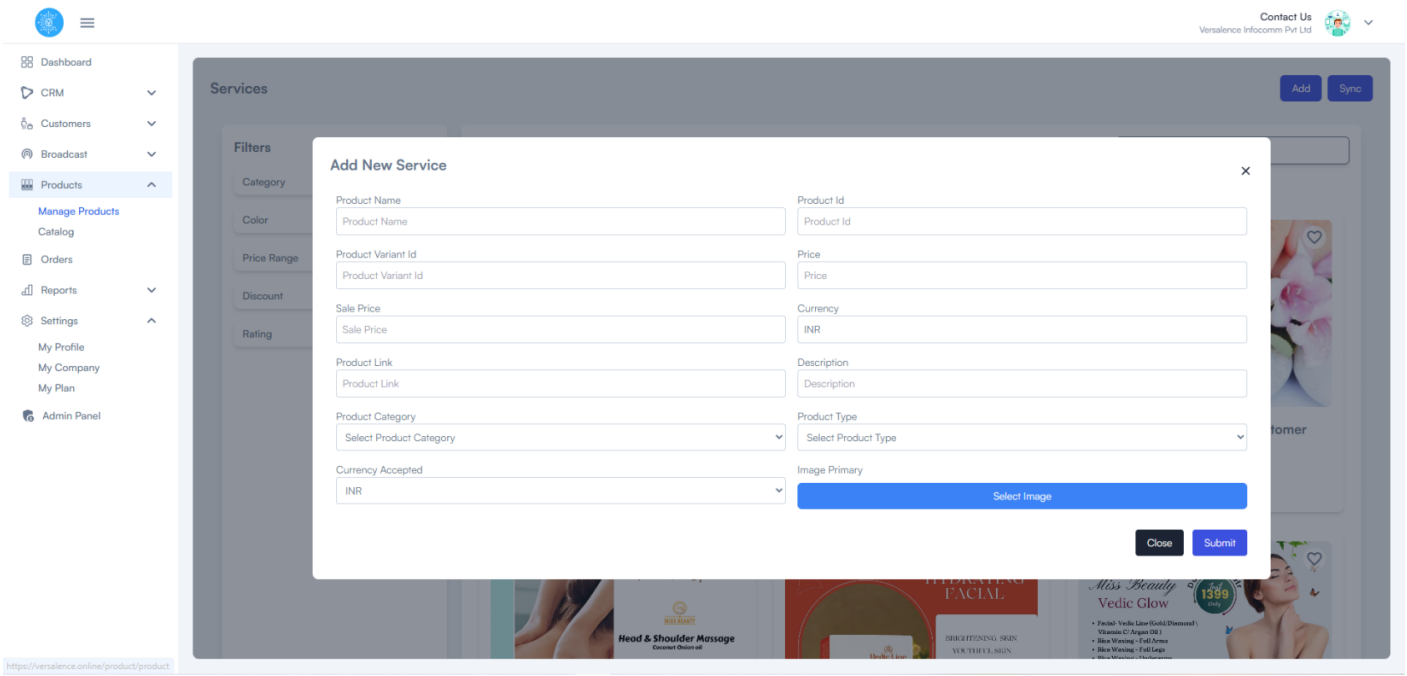
1. **Connect Your Meta Commerce Manager Account**
   - vCX seeks access to **Meta Commerce Manager** account during embeded signup of WhatsApp or Instagram
   - Once the META commerce catalog is setup (here META Commerce Manager), the catalog id is then attached to Whatsapp Catalog (here WhatsApp Catalog)
   - The catalogs id is finally added to product confiuration in vCX
   - This is a one-time authorization process and ensures secure access and synchronization of product data.



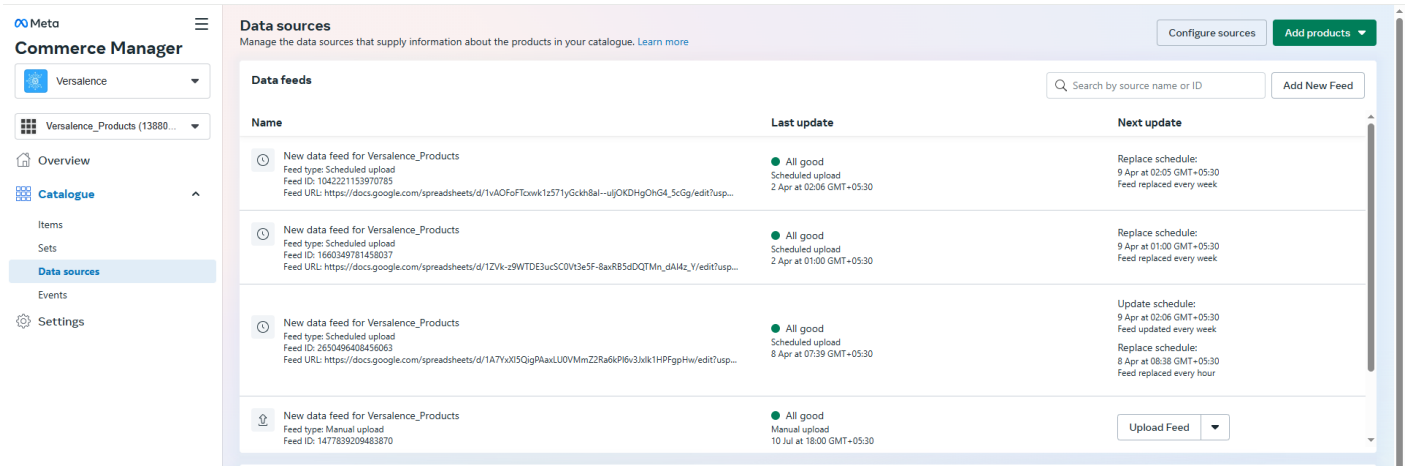


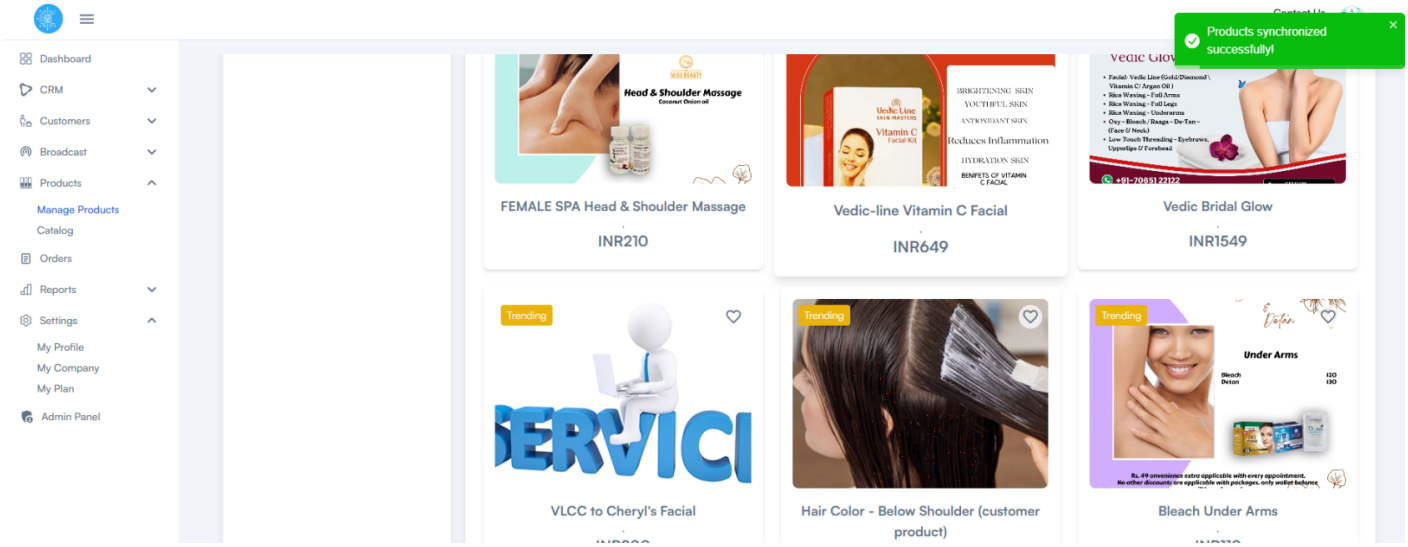


1. **Manage Products in vCX**
   - Use the **Products** module in the vCX dashboard to add or edit products.
   - Each product entry can include:
     - Product name
     - Description
     - Price
     - SKU
     - Product images
     - Availability

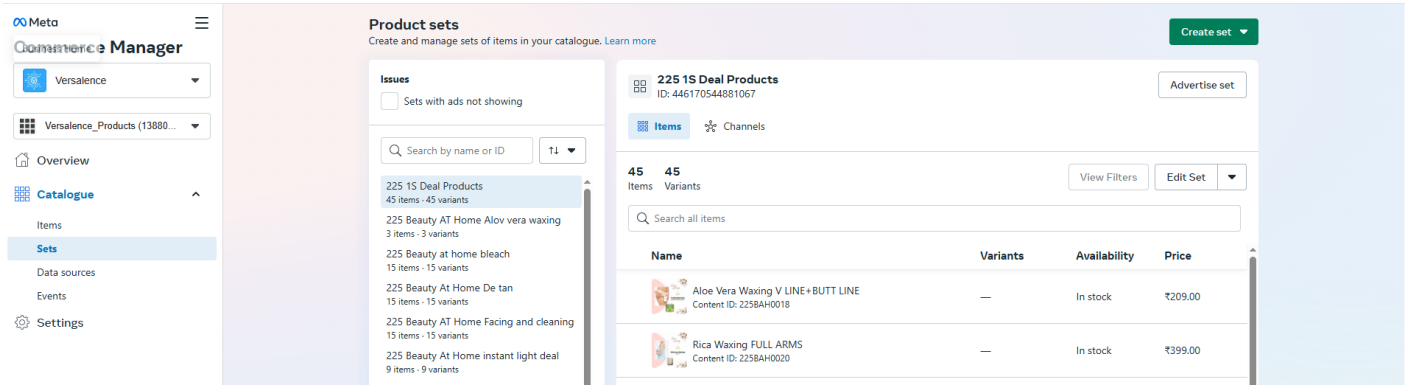


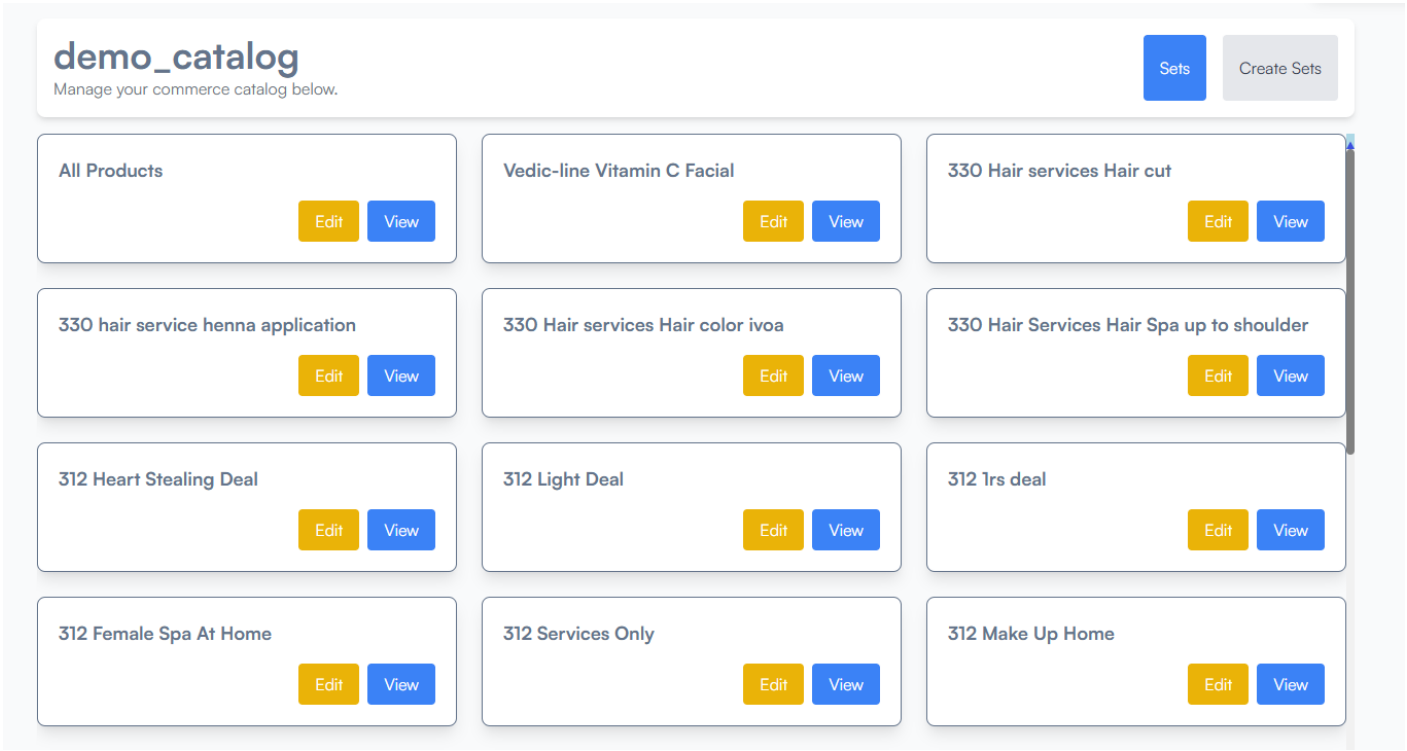
1. **Upload Products to Meta Commerce**
   - With a single click, products added to vCX can be **pushed directly to Meta Commerce Manager**.
   - No need to manage multiple catalogs across different Meta platforms manually.
2. **Sync Products from Meta Commerce**
   - Meta commerce supports adding produts to catalog from various data sources. This could mean that vCX product manager may be out of sync
   - To solve this problem, we have added **Sync** to the Products catalog
   - Sync will sync the products & sets in Meta Commerce and ensure that vCX products manager and Meta Commerce are in sync





1. **Create Product Sets**
   - Easily group products into **Sets** based on categories like “Summer Sale,” “New Arrivals,” or “Best Sellers.”
   - Sets help improve visibility in ads and storefronts.





1. **Use Catalogs Across Channels**
   - Once your product catalog is uploaded:
     - Use **catalog templates in WhatsApp** chats to showcase product options.
     - Enable **shopping experiences on Instagram and Facebook**.
     - Power your **Facebook and Instagram Ads** using the product catalog for dynamic, targeted promotions.

□□ Where Your Catalog Can Be Used

Platform	Usage
WhatsApp	Share product templates in real-time chats
Instagram	Tag products in posts and enable shopping
Facebook	Create a full storefront with checkout
Meta Ads	Use dynamic product sets in targeted campaigns

□□ Security & Permissions

Your Meta account and product data are handled with utmost security. vCX uses secure APIs and only accesses the data necessary for catalog management. You retain full control and visibility over your product listings on Meta platforms.

□□ Benefits

- **Centralized product management** across platforms
- **No technical complexity** for users—intuitive UI in vCX
- **Streamlined sync** between your business and Meta
- **Boost discoverability** via Facebook/Instagram Shop
- **Real-time updates** to product details, reflected instantly across Meta

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□□ Requirements

- A verified Meta Business Manager Account
- Admin access to Meta Commerce Manager
- Product data prepared in vCX
- Business approved for Instagram or Facebook Shops (for those platforms)

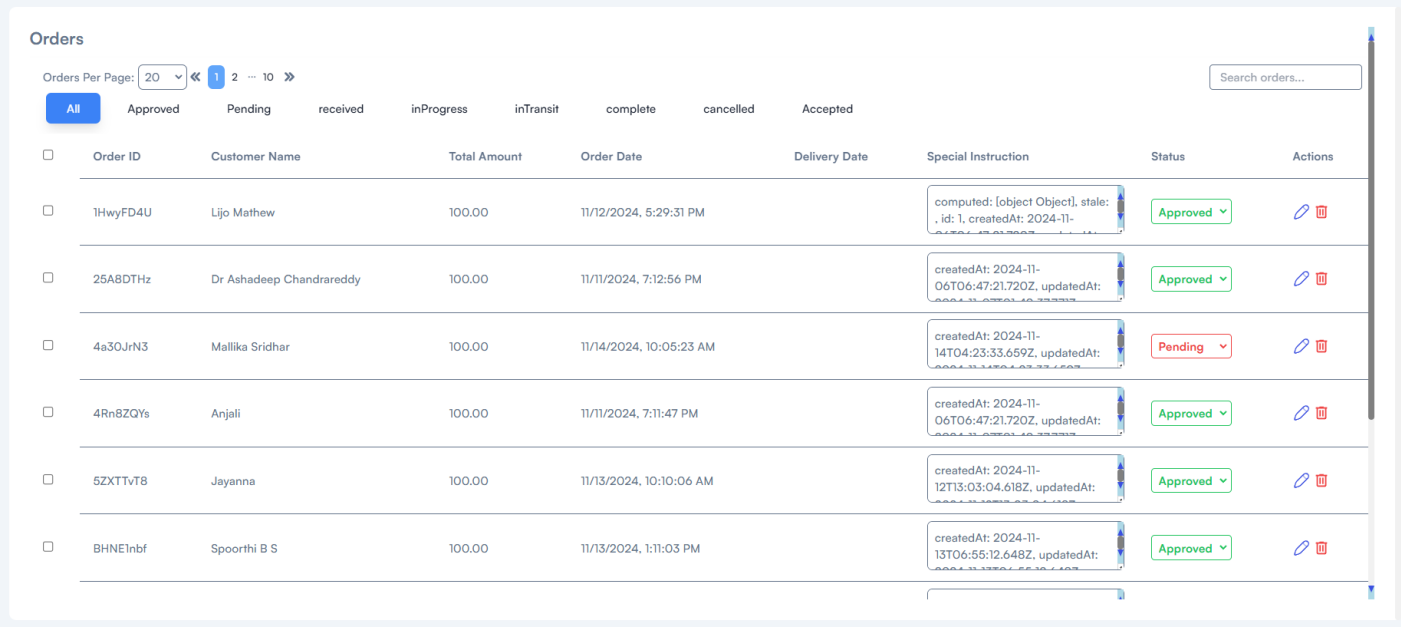
Order

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

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.



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 previlages your may see My Company and My Plan

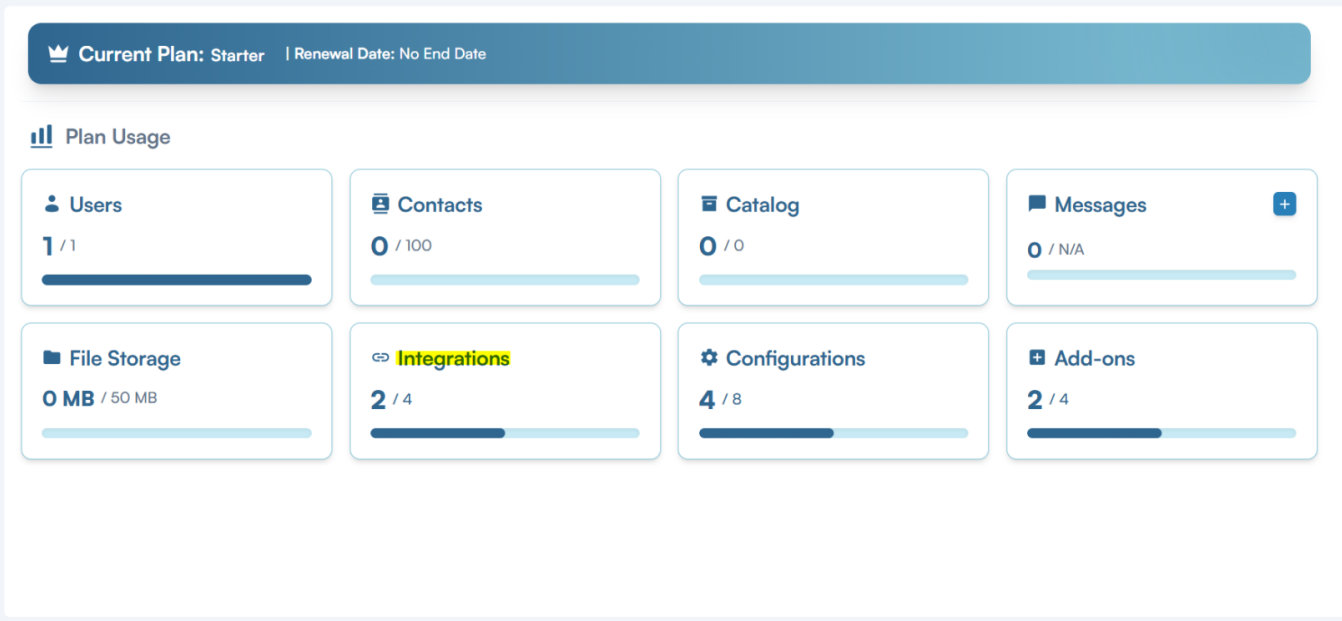
My Plan hosts a variety of settings including integrations, add-ons, configurations, billing etc.

Settings

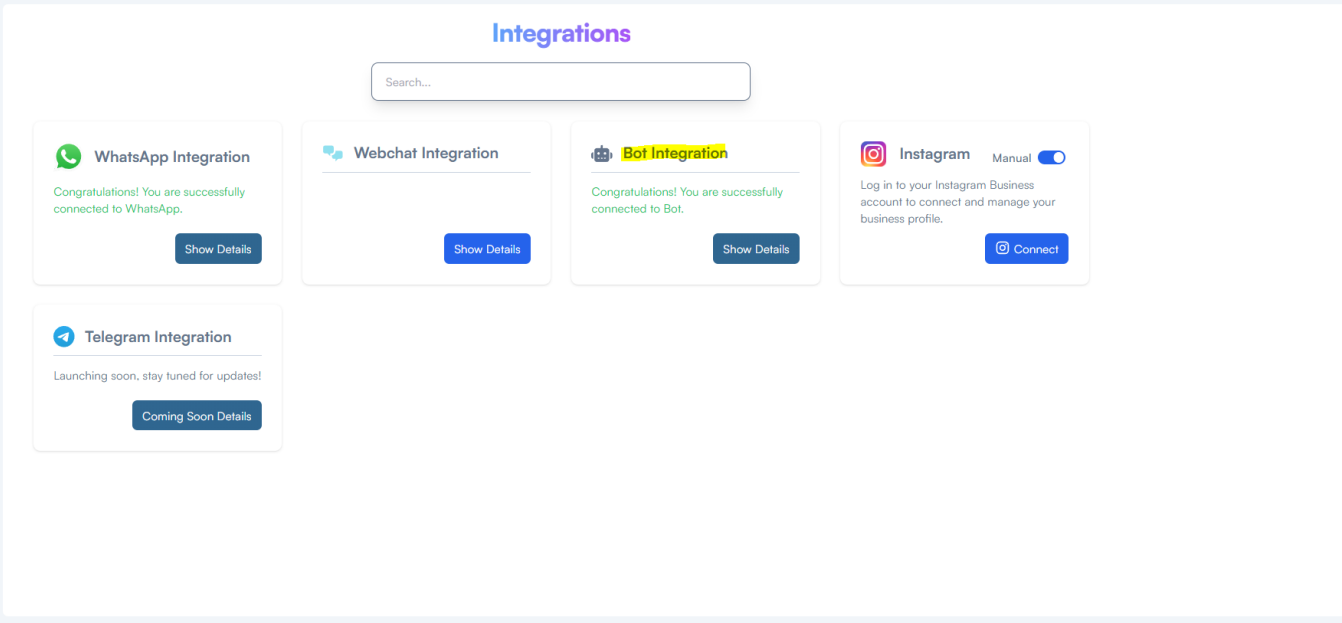
Customizing your Webchat CSS

To customize your webchat CSS

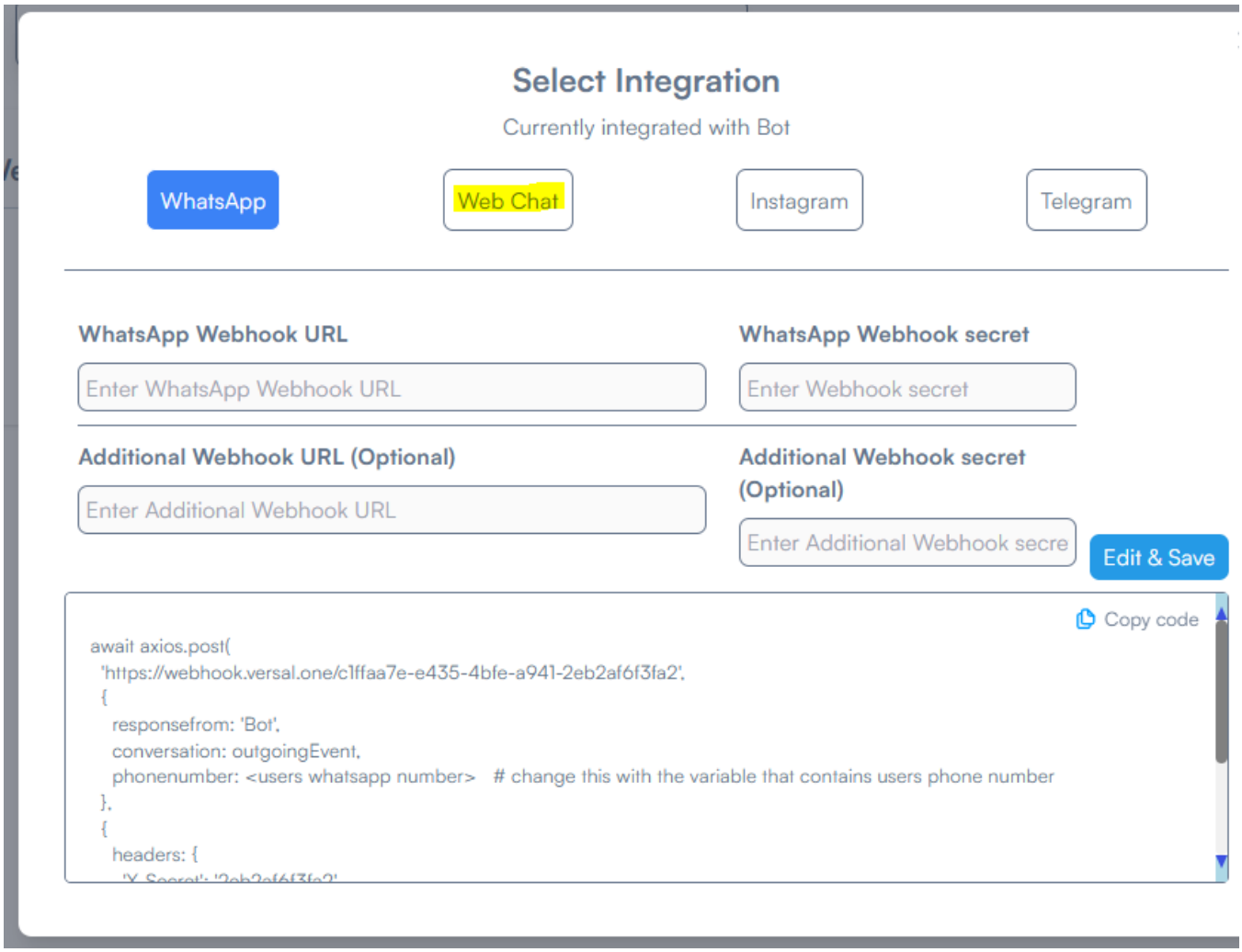
- Go to MyPlan -> Settings



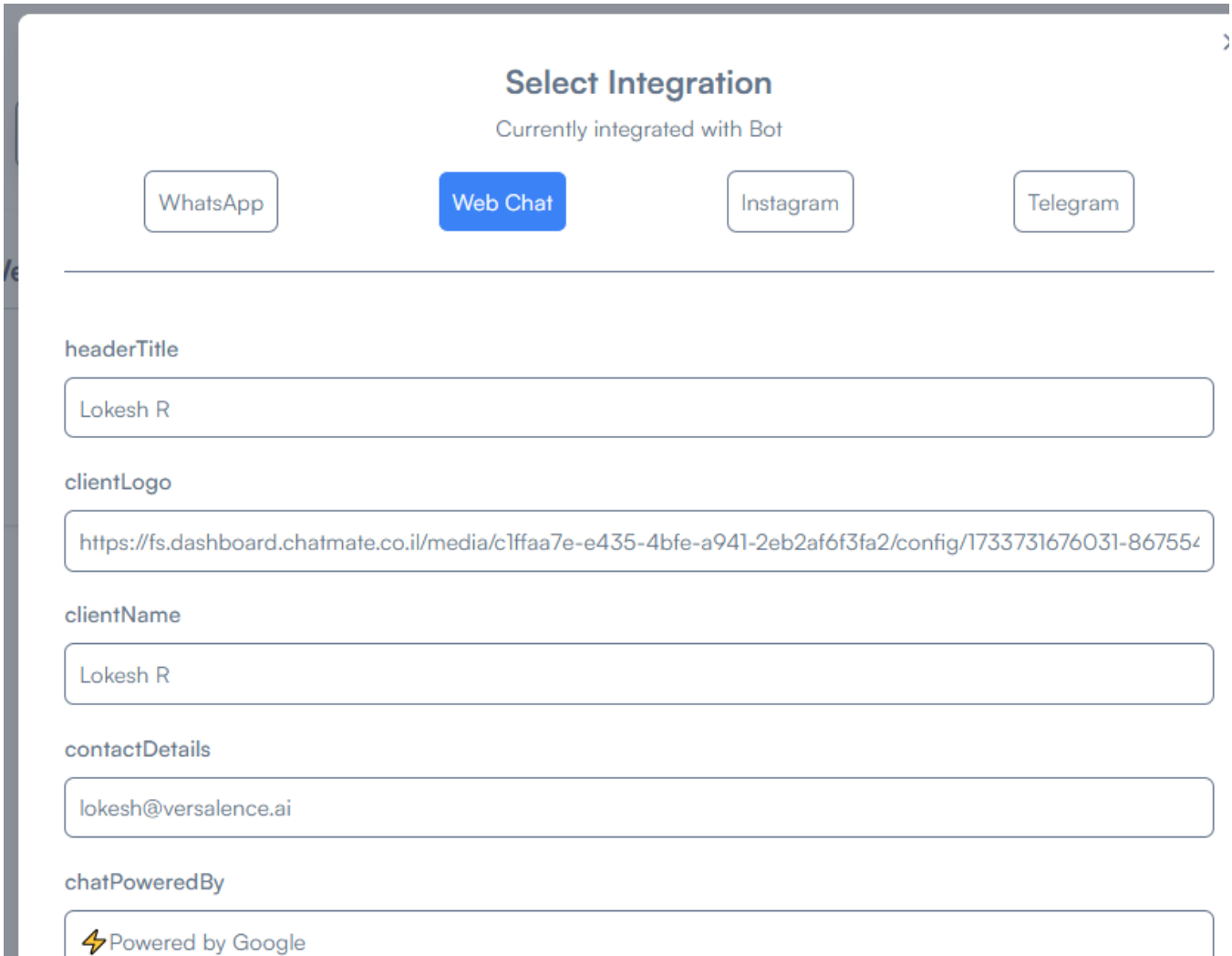
- Select Bot Integrations

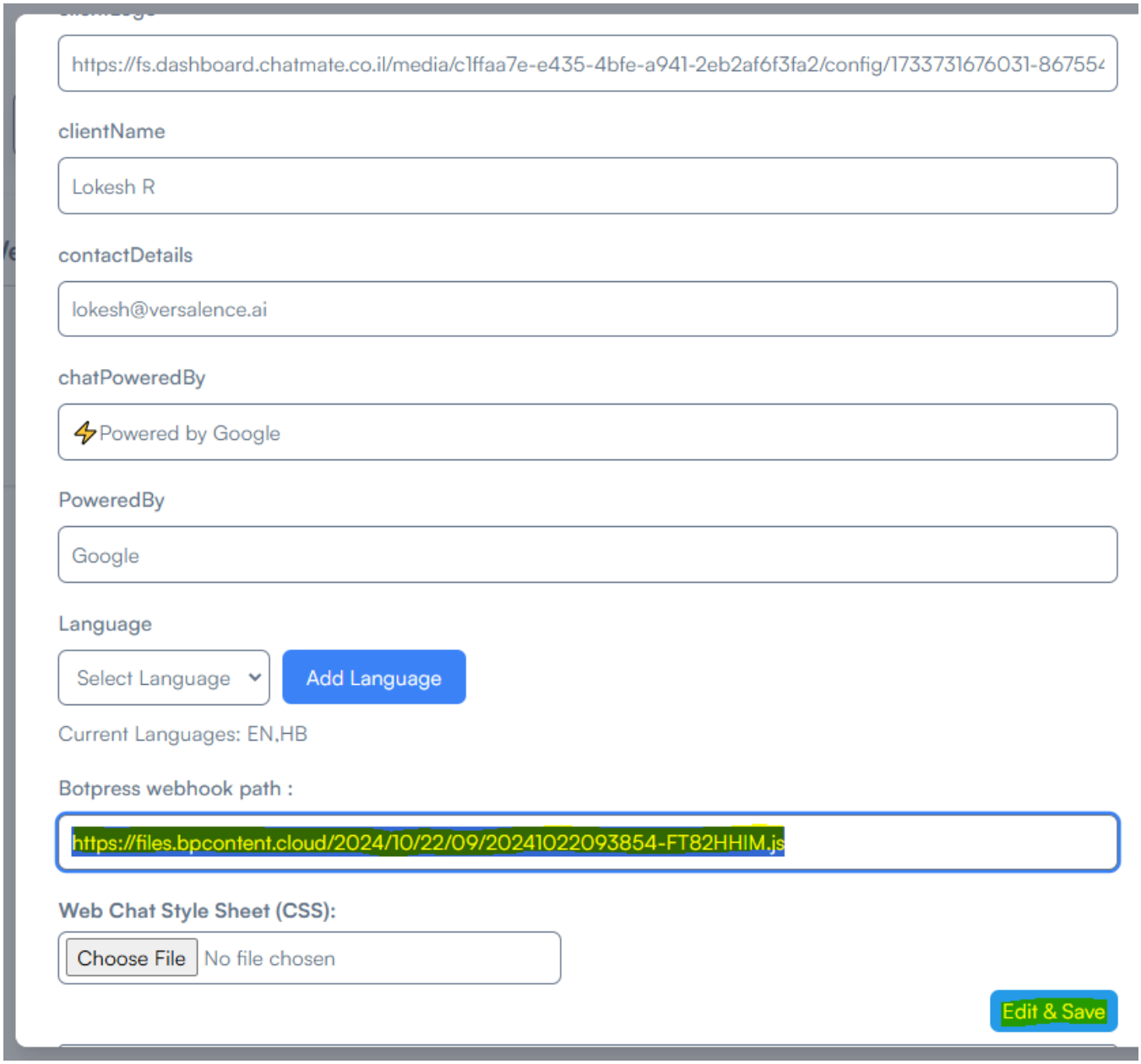


- Select Web Chat

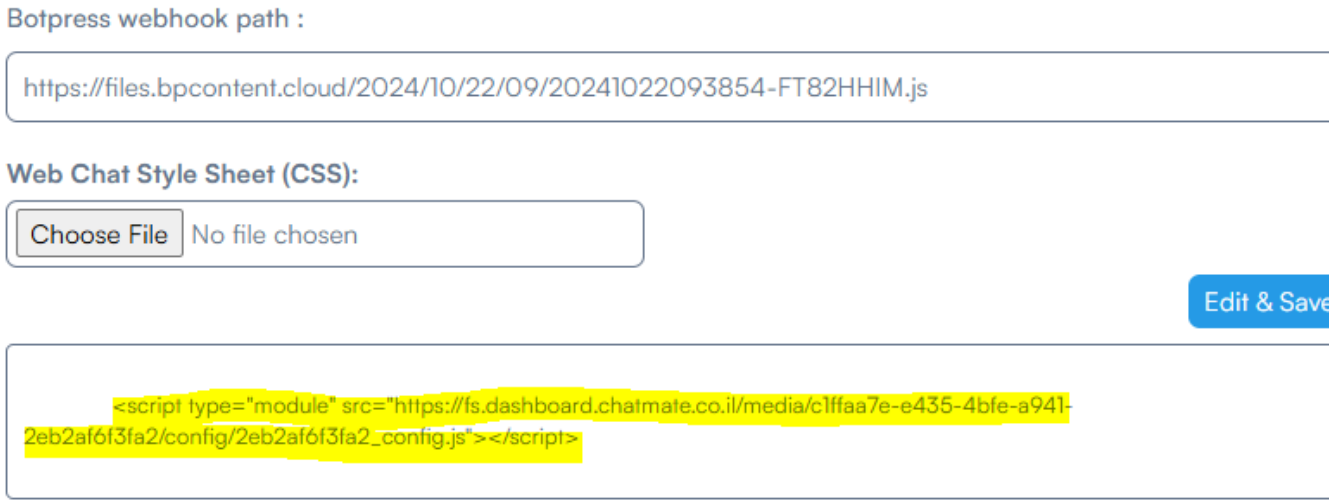


- Enter the values





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



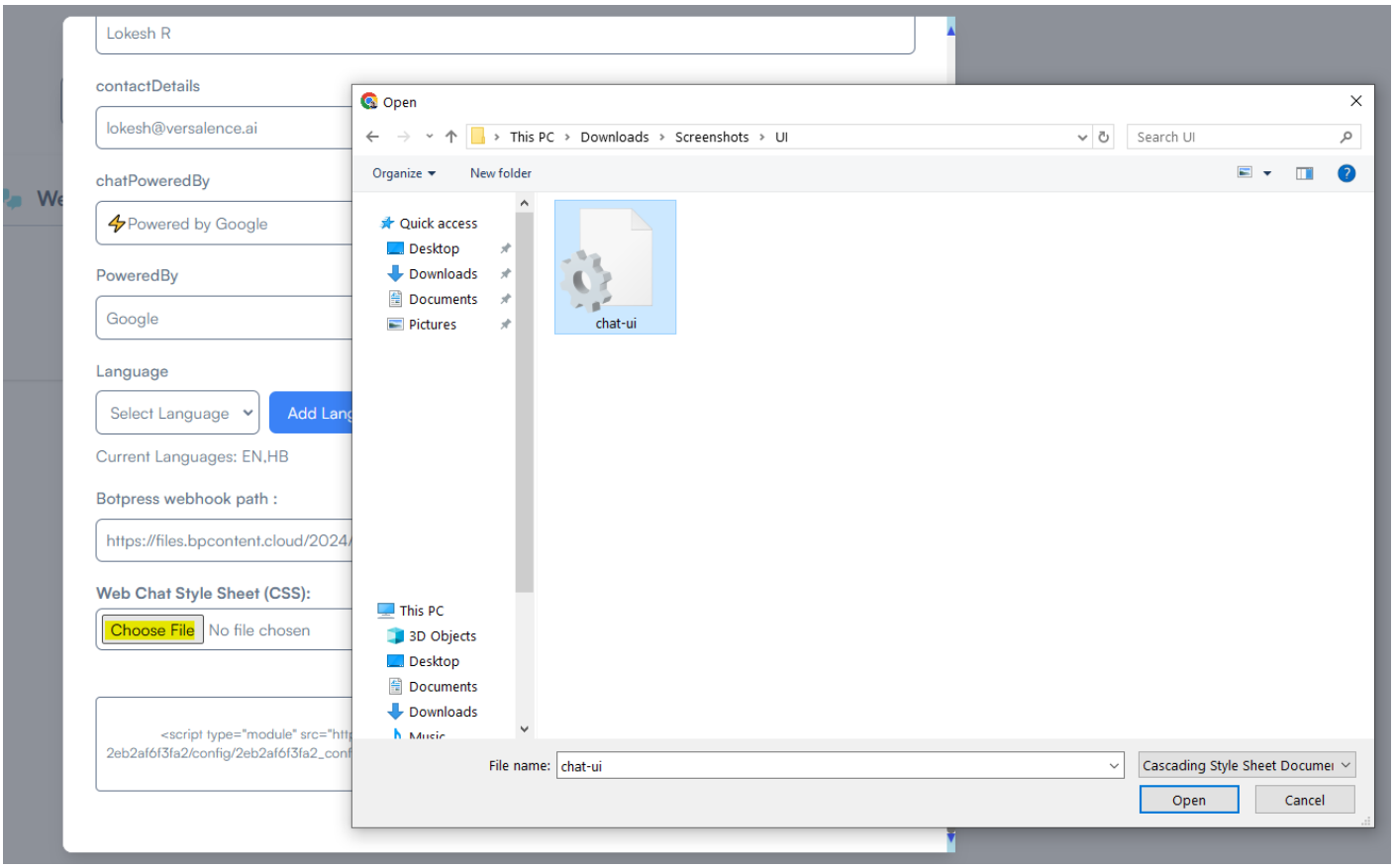
- Open the link in a browser to reveal the details of the .js file

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

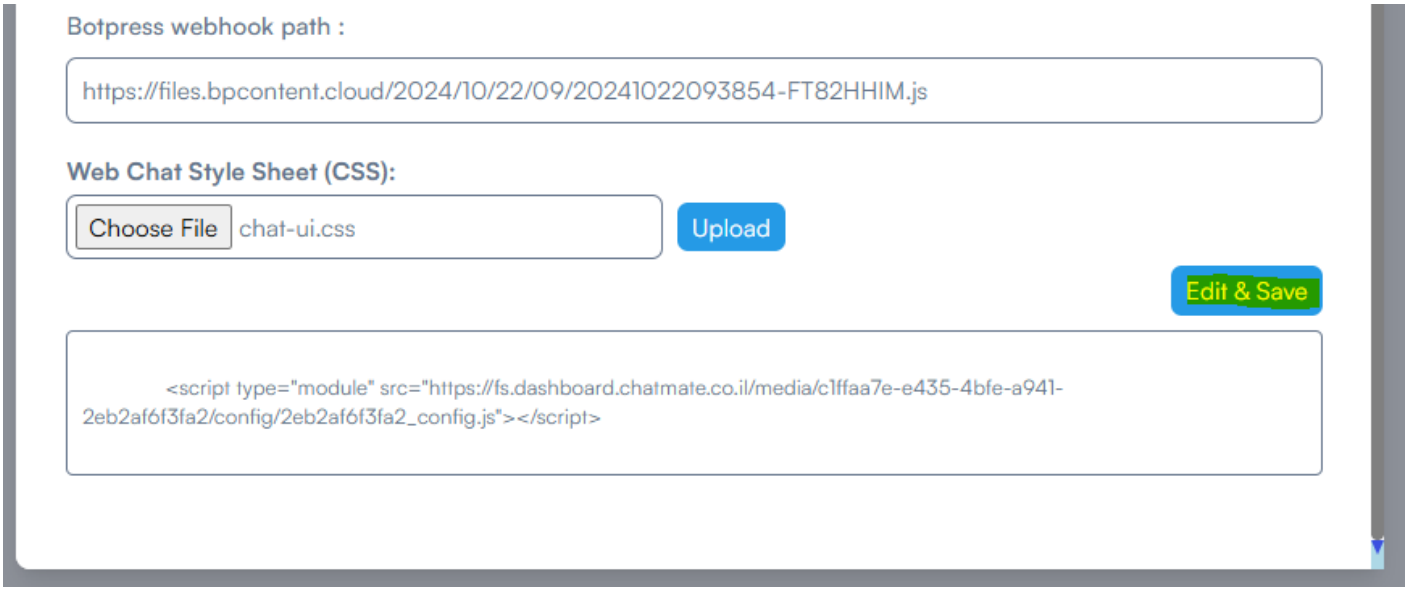
```
/* chat-ui.css */

: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;
}
```

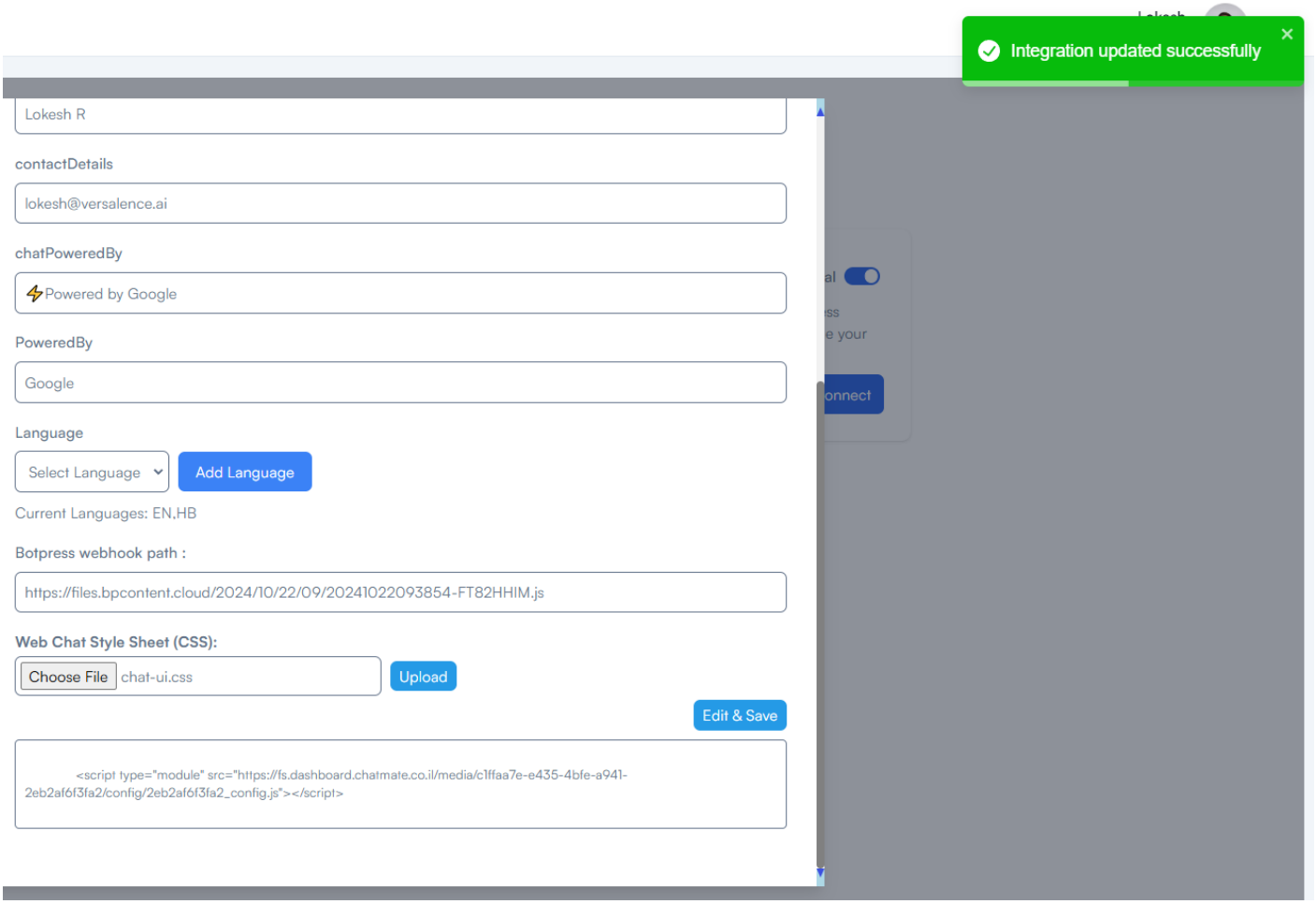
- Download the file or save it to your fav code editor to make required changes to your CSS

Once the changes are done - upload the file back



Click Edit&Save to apply your new CSS




Integration updated successfully
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
chat-ui.css
Upload
Edit & Save
<script type="module" src="https://fs.dashboard.chatmate.co.il/media/c1ffaa7e-e435-4bfe-a941-2eb2af6f3fa2/config/2eb2af6f3fa2_config.js"></script>