

# User Manual for E-chat Integration by MasterCRM



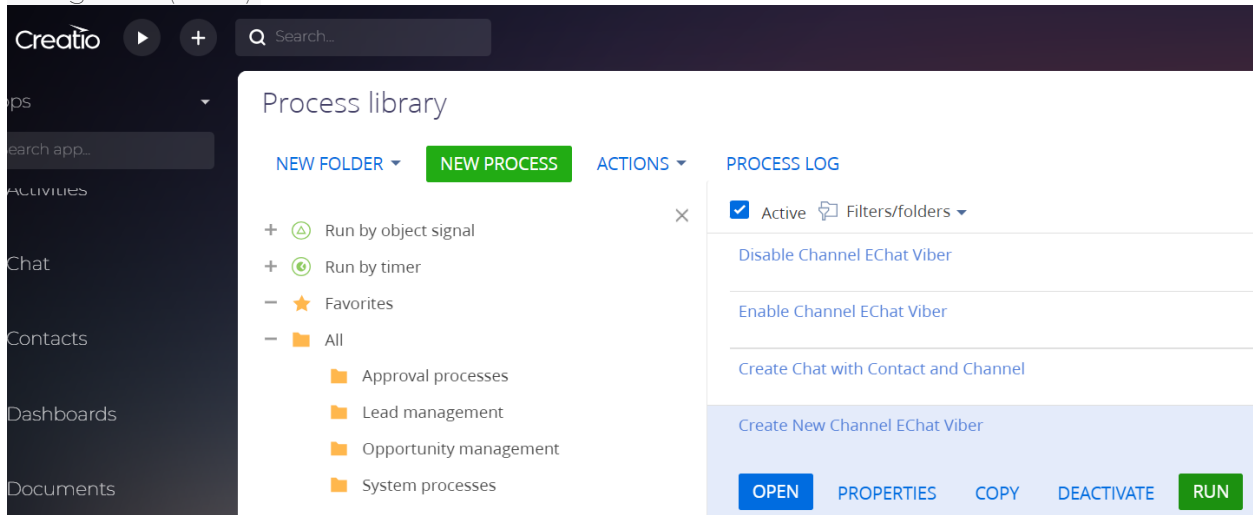
**MASTERCRM.**

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## Create Channel

Initiate the process "Create New Channel EChat Viber"/"Create New Channel EChat Telegram" (RUN).



The integration settings form will be opened for you to fill out.

### Specify field values

**ADD** CLOSE

Name*	EChatViberNumber1
Number*	380117779977
Token*	167as1aiusdh

Fill in all fields

- *Name*: an arbitrary name that will be used in all user interfaces of the system
- *Number*: Phone number connected to Viber/Telegram E-Chat
- *Token*: A token tied to the number

After filling all the fields, press the "ADD" button. A message about the successful addition of the channel will appear.

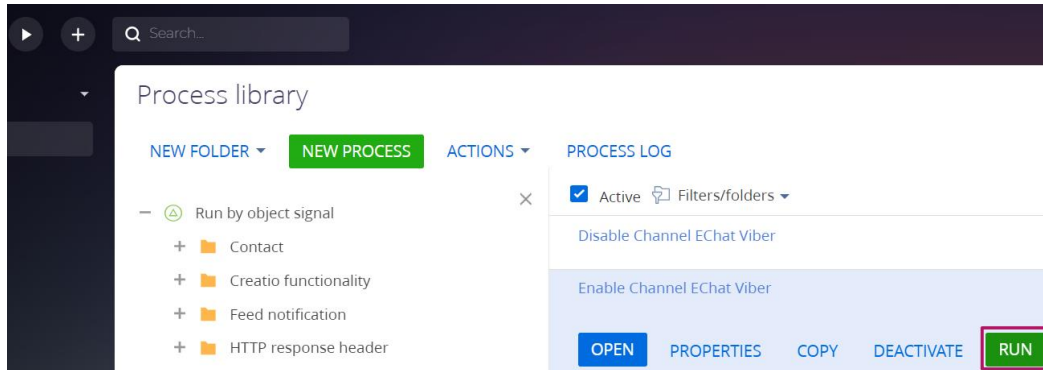
### Number successfully linked to API

**OK** CLOSE

This means that the channel is created in Creatio and activated in E-Chat. Additional activation is not required

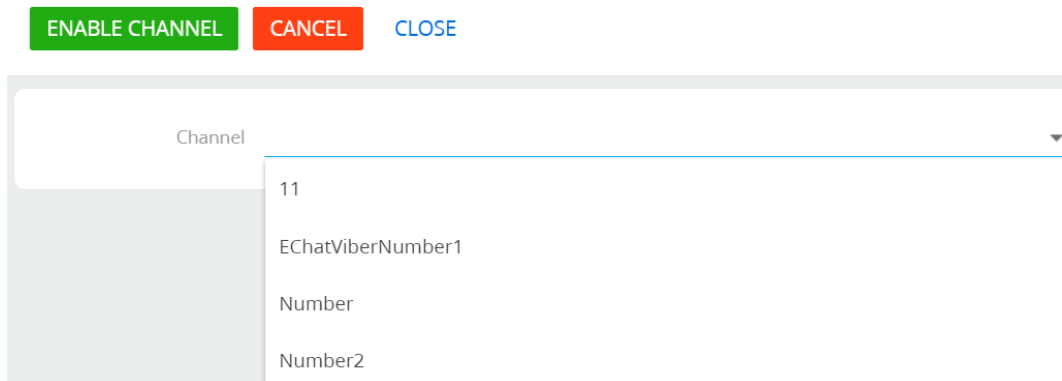
## Enable channel

If the channel has been deactivated in Creatio, to reactivate it, you need to run the "Enable Channel EChat Viber/Telegram" process (RUN)



Select the required channel from the list

Select a channel



Press the «*ENABLE CHANNEL*» button

Number successfully linked to API



This means that the channel is activated in E-chat

## Disable channel

To disable the integration of the E-Chat channel in Creatio, it is necessary to run the "Disable Channel EChat Viber/Telegram" process (RUN)

### Process library

The screenshot shows the 'Process library' interface. At the top, there are buttons for 'NEW FOLDER', 'NEW PROCESS', 'ACTIONS', and 'PROCESS LOG'. Below these, there is a list of process types: 'Run by object signal', 'Run by timer', 'Favorites', and 'All'. On the right, a search filter is set to 'Active'. The main area displays a process named 'Disable Channel EChat Viber' with a 'RUN' button highlighted in green. Other buttons for 'OPEN', 'PROPERTIES', and 'COPY' are also visible.

Select the required channel from the list

The screenshot shows a dialog box titled 'Select a channel'. At the top, there are three buttons: 'DISABLE CHANNEL' (green), 'CANCEL' (red), and 'CLOSE' (blue). Below the buttons is a search bar labeled 'Channel' with a dropdown arrow. The dropdown menu is open, showing a list of channel options: '11', 'EChatViberNumber1', 'Number', and 'Number2'.

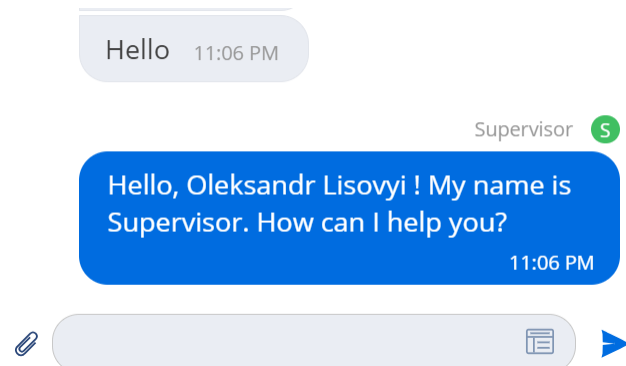
## Work with the messages

The standard interface for working with chats of the Creatio communication panel is used.

To receive a chat, a registered user must be assigned to the chat processing queue and have an Active status.

To accept a chat from the user, press the Accept chat button.

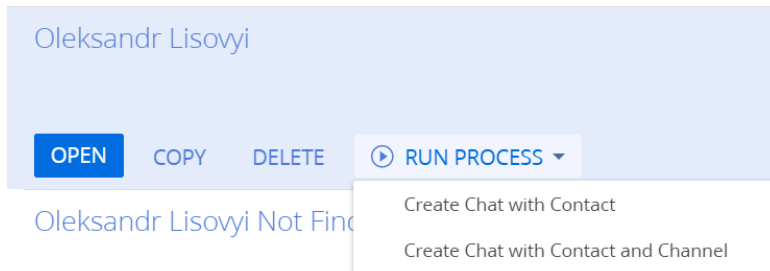
Communicate through the Chats tab of the communication panel in the usual manner



## Initiate a message

You can add a custom functionality to initiate chat with a contact through actions dashboard on the pages or using custom business-process.

As an example, you can use "Create Chat with Contact"/"Create Chat with Contact and Channel" business processes, available in the Contacts section in ClassicUI: select the required contact and choose the required option on the RUN PROCESS button



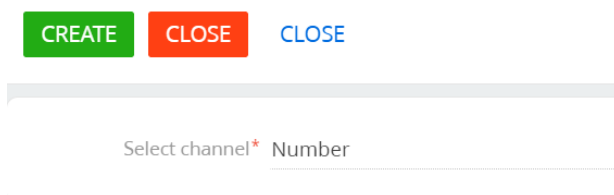
### *Create Chat with Contact*

Uses the last channel the user communicated with or the value of the *MscEChatViberPhoneNumberDefault*. system setting. The phone number for communication with the client is selected from the Mobile phone field on the contact page.

### *Create Chat with Contact and Channel*

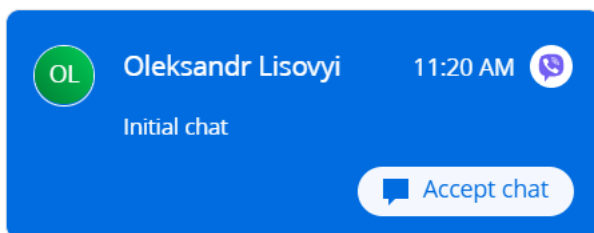
Allows you to choose a channel for communications with the client

## Select channel



After that, a message about a new chat will appear in the communication panel

### New chats



Further, the work proceeds in the same way as for incoming messages