

fintech  OS

Omnichannel Communication Automation 20.2.6

User Guide

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Overview

The Omnichannel Communication Automation enables you to overcome the challenge of email delivery.

This automation processor allows you to use the FintechOS Gateway as email server and send emails on your company's behalf. You can handle email delivery and track real-time email events directly from within FintechOS, The email communication with your customers is reliably sent and delivered as needed.

Omnichannel Communication Automation Features

- Easy configuration
- Open Email & Click URLTracking
- Email Template Engine.

Installation

FintechOS Studio comes with the Omnichannel Communication Provider processor pre-installed.

Applications

- Omnichannel campaigns for notifying customers.

Create the Channel Configurations

1. Log into the FintechOS Studio using a developer account.
2. From the menu, click **Admin > Omnichannel Communication Automation > Channel Configurations**.
3. The page Channel Configurations List is displayed. Click on the **Insert** button to add a new channel configuration.

CHANNEL CONFIGURATIONS LIST	
<input type="checkbox"/>	Name
	<input type="text" value="Q"/>
	AzureNotificationHub
	Email
	Sms

The Add Channel Configurations page appears which allows you to create a new configuration.

4. Fill in the following fields:

EDIT CHANNEL CONFIGURATION	
Name	<input type="text" value="Email"/>
code	<input type="text" value="2"/>

Field	Data type	Description
Name	Text	Insert a suggestive name.
Code	Whole number	Insert a unique code.

5. At the top-right corner of the page, click the **Save and reload** icon to save the changes.
The Edit Channel Configurations page appears.

Configure Omnichannel Communication Channel Providers

1 Apply for subscription key

Go to the FintechOS Services Portal and apply for a subscription key for the FintechOS Omnichannel Communication Automation processor. You need the subscription key to configure the automation processor, which is editing the FTOSEmailGateway channel provider so that it uses this processor.

2 Edit the FTOSEmailGateway channel provider

To configure the Omnichannel Communication Automation you need to edit the FTOSEmailGateway channel provider:

1. Log into the FintechOS Studio using a developer account.
2. From the menu, click **Admin > Omnichannel Communication Automation > Channel Providers**.

3. Double click on the 'FTOSEmailGateway' record.

Name	Communication Channel
FTOSApsSms	Sms
FTOSEmailGateway	Email
GatewayEmail	Email
GatewayEmailOTP	Email
GatewaySms	Sms
GatewaySmsOTP	Sms

The Edit Channel Provider page appears which allows you to update settings and also see the list of [channel provider statuses](#).

4. Fill in the following mandatory fields:

Field	Data type	Description
Communication Channel	Option set	Select email from the option set. For details, see "Create the Channel Configurations" on page 5 .
Name	Text	Insert the name for the gateway.
Provider Name	Text	Insert the name of the provider.
Service Url	Text	The URL provided by FintechOS
App user	Text	It is the user credentials given by the provider.
App Password	Text	It is the password given by the provider.

Field	Data type	Description
App Key	Text	The subscription key provided by the FintechOS Services Portal for the FintechOS Omnichannel Communication Automation processor.
appConfig	Text	
From Address	Text	<p>The email address from which the emails will be sent to customers. It is the email address displayed in the From field of the email sent to customers.</p> <div style="background-color: #f4a460; padding: 10px; border-radius: 5px;"> <p>IMPORTANT!</p> <p>Please, be sure to consult FintechOS to create an email address with the name of the company.</p> </div>
Bulk No	Whole Number	The number of emails that are processed in one step.
Interval Min	Text	It is the limit for sending messages. The job will send messages only in this time frame (HH:MM:SS) (UTC time).
Interval Max	Text	It is the limit for sending messages. The job will send messages only in this time frame (HH:MM:SS) (UTC time).
Retry Max Attempt	Whole number	The maximum number of times the server tries sending the message if the message status is 'Error'.
Pool Time Retry	Text	The time interval the server waits until it attempts to send the message that has previously failed (message status is 'Error'). The format is HH:MM:SS (hours:minutes:seconds).

Field	Data type	Description
Open Setting	Bool	Tracks the open email events.
Click Setting	Bool	Tracks the clicked links within the email body events.

5. At the top-right corner of the page, click the **Save and close** icon to save the changes.

Use the Omnichannel Communication Channels

The available channel provers are for e-mail and SMS. The available list in the FintechOS Studio for e-mail is:

- FTOSEmailGateway
- GatewayEmail
- GatewayEmailOTP.

The available list in the FintechOS Studio for SMS is:

- GatewaySMS
- GatewaySMSOTP
- FTOSApiSMS.

Email provider configurations

1 Add Communication Channel

1. From the main menu, click **Admin > Omnichannel Communication Automation > Communication Channels**. The Communication Channels List page appears.
2. Provide a **Name** for the communication channel.
3. From the **Default Action Type** field, select **Email**.

4. From the **Bus Communication Channel** field, select **Email**. For Bus Communication Channel, see details "[Create the Channel Configurations](#)" on page 5.
5. From the **Bus Communication Provider** field, select **FTOSEmailProvider**. For details, see "[Configure Omnichannel Communication Channel Providers](#)" on page 7.
6. From the **Extended Properties Entity**, select from the list the entity. Through certain channels, it allows sending some properties with the JSON format, using this channel as API.
7. At the top-right corner of the page, click the **Save and close** icon to save the communication channel.

You can now add messages to the Message queue and send them using the Omnichannel Communication Automation processor.

2 Add message

You can add messages to the FintechOS email server gateway to be processed within the specified time interval.

1. Go to the Message Queues List page ([#/entity/FTOS_DPA_MessageQueue/list](#)).
2. At the top-right corner of the page, click the **Insert** icon. The Add Message Queue page appears.
3. Provide the **ToAddress**, that is, the email address where the email should be sent.
4. Provide the **CC**, that is, one or more carbon copy email addresses separated by commas.
5. Provide the **BCC**, that is, one or more blind carbon copy email addresses separated by commas.
6. Fill in the email **Subject** and **Body**.
7. Optionally, add an attachment to the email.

8. From the **Communication Channel** field, select **Email**.
9. From the **Channel Provider** field, select **GatewayEmail**.
10. Set the interval (date and time) when you want the message to be sent.
11. Select the **Start Date**, **End Date**, **Interval Min (Time UTC)** and **Interval Max (Time UTC)** (for example: 00:00:00, 23:00:00).
12. From the **Message Status** field, select **New**.
13. From the **Channel Provider Status** field, select **200**.
14. At the top-right corner of the page, click the **Save and close** icon to save the message queue.

When the message is sent (for example, when running omnichannel campaigns), if you have configured the Omnichannel Communication Automation processor to track open emails and URL clicks, the Message Events section (Edit Message Queue Page), lists all open and click events. For URL click events, it also displays the URL which has been clicked.

SMS provider configurations

Add Communication Channel

1. From the main menu, click **Admin > Omnichannel Communication Automation > Communication Channels**. The Communication Channels List page appears.
2. Provide a **Name** for the communication channel.
3. From the **Default Action Type** and **Bus Communication Channel** fields, select **SMS**.

4. From the **Bus Communication Provider** field, select **FTOSApiSMS**.

The screenshot shows a form titled "EDIT COMMUNICATION CHANNEL" with a sub-header "COMMUNICATION CHANNEL". The form contains the following fields:

Field Name	Value
Name	SMS-based provider
Default Action Type	SMS
Bus Communication Channel	Sms
Bus Communication Provider	GatewaySms
Extended Properties Entity	Account

5. At the top-right corner of the page, click the **Save and close** icon to save the communication channel.

You can now add messages to the Message queue and send them using the Omnichannel Communication Automation processor.

For details on how to implement a new provider for sending SMS through FTOS service, see [Configure the FTOSApiSMS provider](#).

For details regarding the SMS-based Two-Factor Authentication, see [SMS-based Two-Factor Authentication](#).

Channel Provider Statuses

Failed requests return an error that contains: a response code, a message explaining the reason for the error and a link to any relevant documentation that might help you troubleshoot the problem.

The table below describes the list of predefined errors but you can add others if you need.

EDIT CHANNEL PROVIDER STATUS

Code	400
Description	BAD REQUEST
Channel Provider	FTOSEmailGateway ↓ ↗
messageStatusId	Error ↓ ↗

Error Code	Error reason	Description
200	OK	Your message is valid, but it is not queued to be delivered.
202	ACCEPTED	Your message is both valid, and queued to be delivered.
400	BAD REQUEST	
401	UNAUTHORIZED	You do not have authorization to make the request.
403	FORBIDDEN	
404	NOT FOUND	The resource you tried to locate could not be found or does not exist.
405	METHOD NOT ALLOWED	
413	PAYLOAD TOO LARGE	The JSON payload you have included in your request is too large.
415	UNSUPPORTED MEDIA TYPE	
429	TOO MANY REQUESTS	The number of requests you have made exceeds the rate limitations.
500	SERVER UNAVAILABLE	An error occurred on the server.

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Error Code	Error reason	Description
503	SERVICE NOT AVAILABLE	The Email Gateway v3 Web API is not available.

CHANNEL PROVIDER STATUSES

<input type="checkbox"/>	Code
<input type="checkbox"/>	200
<input type="checkbox"/>	202
<input type="checkbox"/>	400
<input type="checkbox"/>	401
<input type="checkbox"/>	403
<input type="checkbox"/>	404
<input type="checkbox"/>	405
<input type="checkbox"/>	413
<input type="checkbox"/>	415
<input type="checkbox"/>	429
<input type="checkbox"/>	500
<input type="checkbox"/>	503
<input type="checkbox"/>	bounce
<input type="checkbox"/>	delivered
<input type="checkbox"/>	dropped

5 10 20