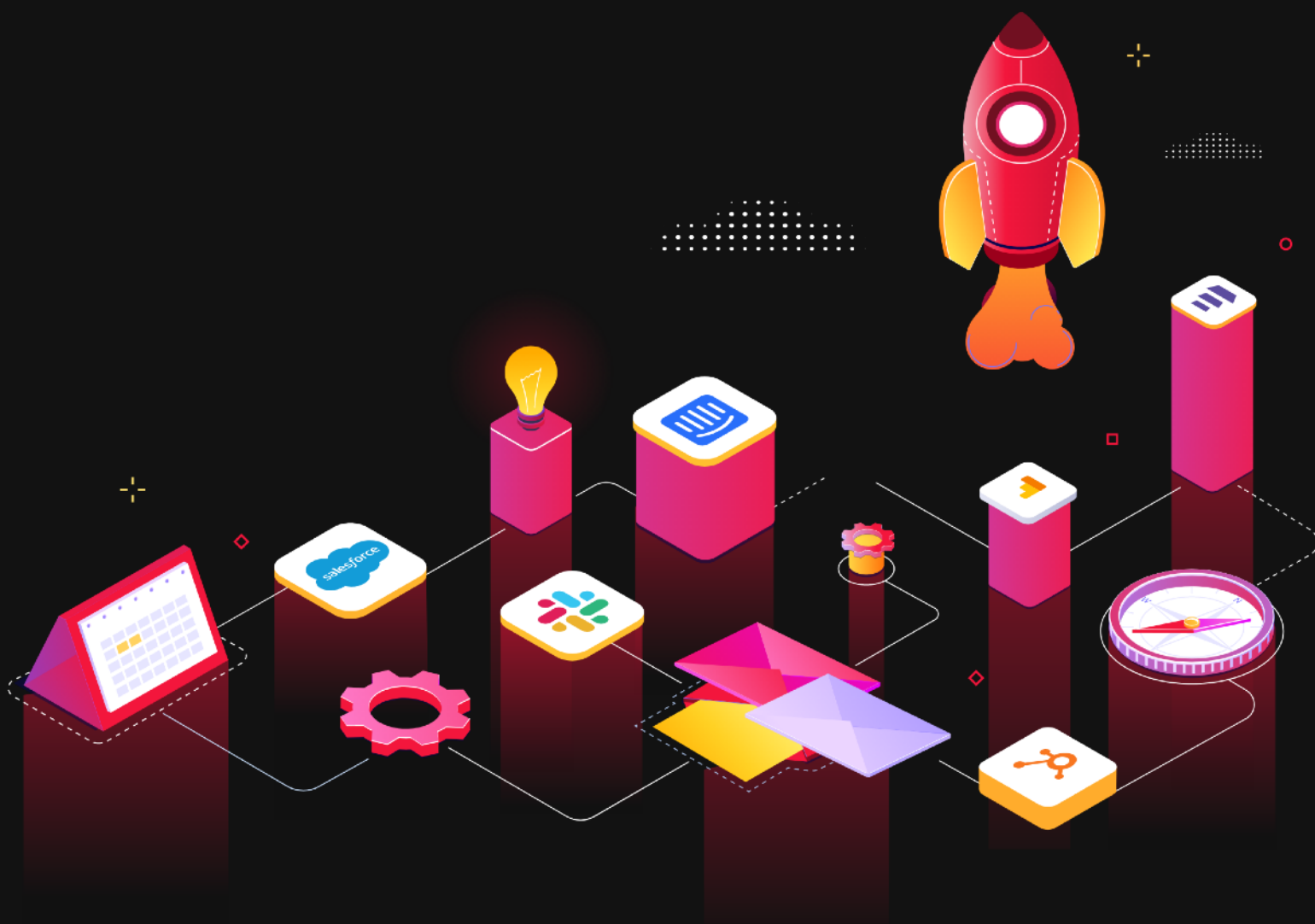


# Checklist on How to Launch a Visual Automation Builder for your AI SaaS Business



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# Intro

As a AI SaaS vendor, providing your users with a complete solution that is easy to use, visually appealing and that allows your users to be more productive is a basic requirement if you don't want them to run off to another product. So, if you are ready to embark in the world of visual integration builders, easy to use drag-and-drop workflow automation builders and built-in custom connectors, welcome to the checklist that will help you get there.

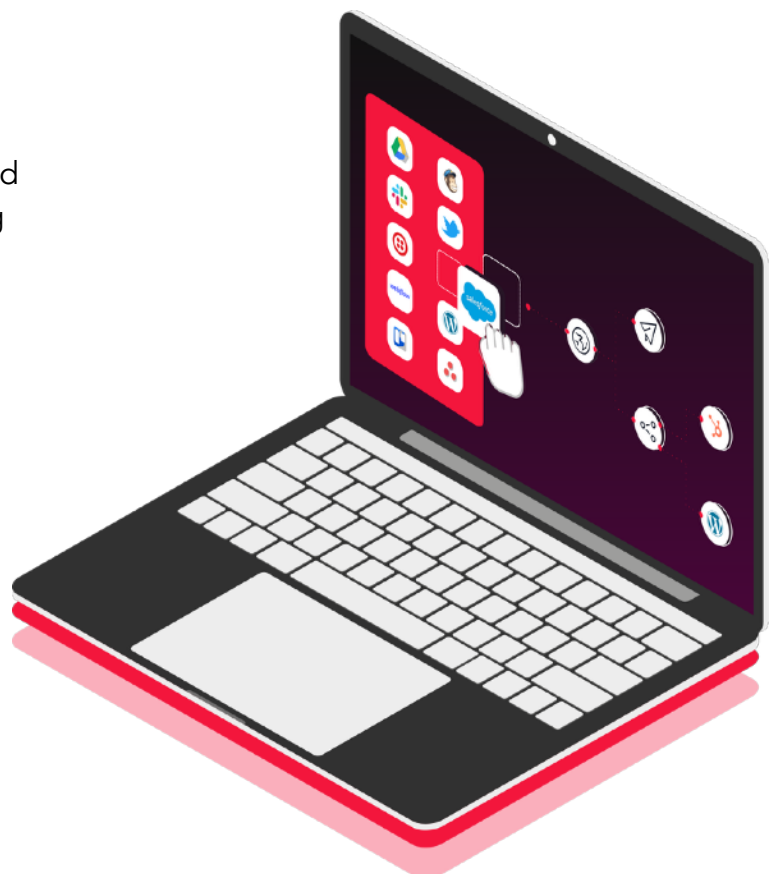
This ultimate checklist will help you through all the steps to implement a visual workflow automation builder to your AI SaaS product, **guiding you to understand what you need to successfully implement this tool to your existing product** and how long it will take you to do so.

By following these steps, you will have launched a visual integration builder and will know what that feels like by reading about **someone who went through all these steps and was finally able to provide their users with this automation tool.**

You will also be able to see what this tool will look like for your users through our visual flows as demonstrated at the end.

**Are you ready to begin?**

**Let's do this!** 💪



# Step-by-Step Checklist ✓

You can launch a visual integration builder to your AI SaaS product by **following 6 simple steps**, explained in this checklist. Yes, it is that simple. Let's get right to it then.

## 1. Choose a platform

When choosing a platform to integrate into your AI SaaS product, there are a few factors that you need to consider.

- **Does it have the connectors you need?**

The thing with connectors is, there are so many out there, that it will be very difficult to find a platform that has all the connectors that all your users may need.

So your best bet here is to find a solution that not only provides you with some already built-in integrations, but allows you, and your users, to easily build their custom ones.

- **Will it integrate seamlessly?**

Many platforms provide you with very limited embedding capabilities. These limitations can limit your customization options, which will tell your users that this is a third-party tool that they are using, and we do not want that. So you should look for platforms that provide HTML 5 SDKs, which will give you full customization capabilities allowing you to change all the details to match your



brand such as colors and logo, so that your users won't even recognize they are interacting with an embedded UI.

## 2. Purchase and Download



After analyzing the available platforms and understanding which one covers your needs, it is time to purchase and download. Each vendor has their own method. Only after contacting their sales and support team, you will be able to download their software for installation. It is important to see what their methods and conditions are, do they offer demos and free trials? Those are a great way to familiarize yourself with the product, understand how it works and if it works for you, allowing you to get a hands-on experience without any commitments.

## 3. Install the Tool

Great, you have selected, purchased and downloaded the tool. Now comes the tricky part, the installation. Most tools are going to let you install this through AWS, Azure, Google Cloud or your own hardware. Check with the experts of the IPaaS platform you chose if they support your infrastructure and if they provide you with support during the installation phase to not have any unpleasant surprises during this step.

## 4. Embed

You also have to be able to integrate it into your frontend. Some tools will have everything pre-prepared for you, so it will be as easy as possible. Some might be a bit more complicated and require more effort from your team. But this is something you will have discussed with them from the beginning.



## 5. Customize

Every application is different, and so is yours. This means that in order to have this IPaaS integrated seamlessly into your product, you will have to customize at least a few things: the frontend, in order to match your brand; connectors, to be able to implement your own custom connectors next to the library already provided by the vendor; among many other advanced customizations you can think of, such as changing the UX, workflow object shapes and layouts. **Customization provides businesses with tremendous opportunities for development and scale.** It also helps to reach a wider range of audiences in no time.



## 6. Launch

The hardest step is done. Now you just have to register your own API credentials in the developer console of the third-party applications that you selected to use as connectors so that users who will authenticate to those will see your logo in the consent dialogs.

Your users can start enjoying the amazing new visual workflows you prepared for them. For them, it may be as easy as a few clicks to authenticate the apps they would like to use. Or it also may be slightly more complex, adding logic, scheduling actions and connecting multiple different apps. **Let your users' imagination run free!**



# How Appmixer Works

Now you understand it really isn't hard to implement an embedded iPaaS to your product providing your users with beautiful and easy to use visual workflow automations.

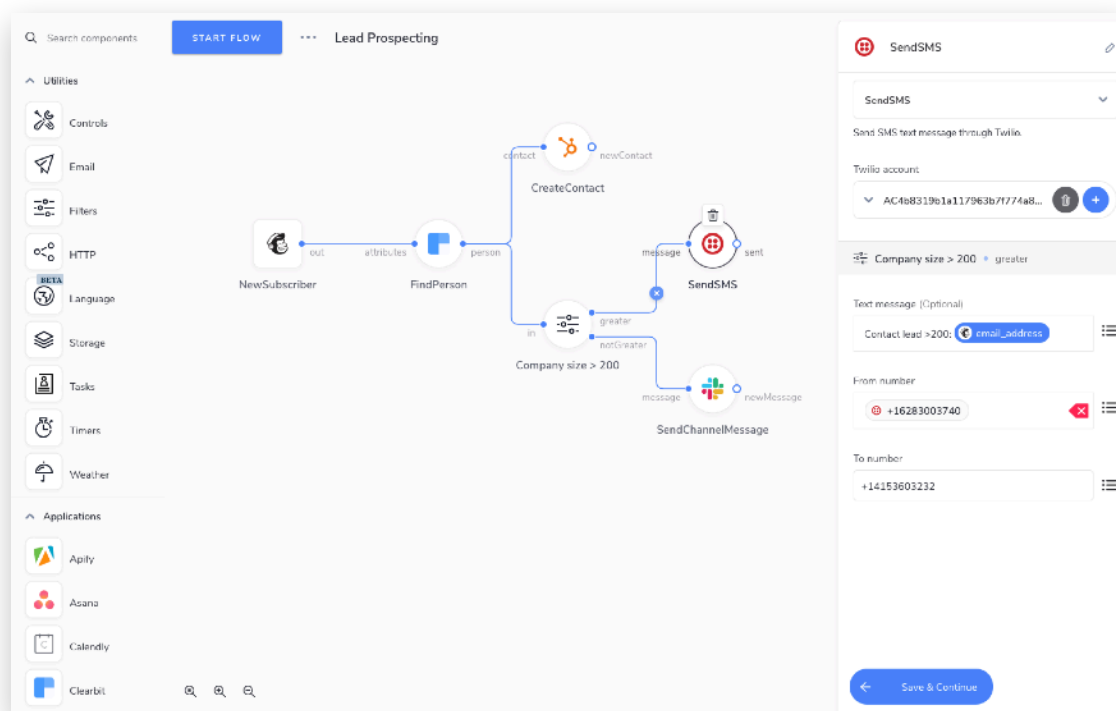
Perlamind was definitely happy with the visual tooling provided by Appmixer, so we would like to share with you how those look like. Here you will be able to see the various ways Appmixer can be integrated into your specific product and help your users be more productive.

## Workflow Automation

The first way that Appmixer can help you is through workflow automation.

Appmixer is used by companies to integrate workflow automation capabilities into their own products. Appmixer's white-label licensing is ideal for extending your products with workflow automation without your end-users noticing that they are interacting with Appmixer's UI. All the Appmixer's UI widgets can be customized to match your branding so seamlessly that your users won't even know it is there.

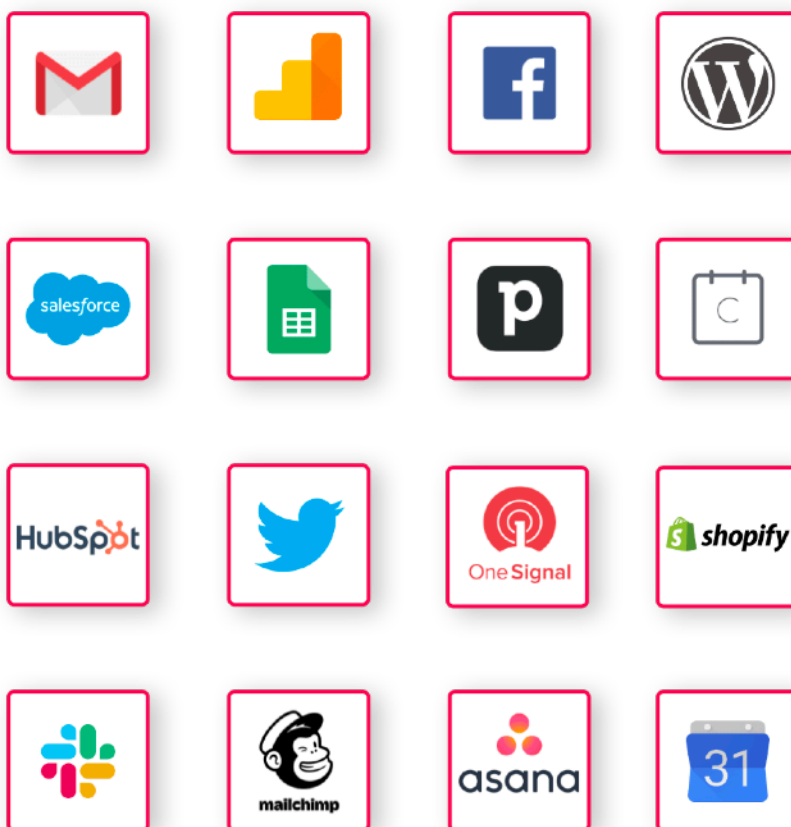
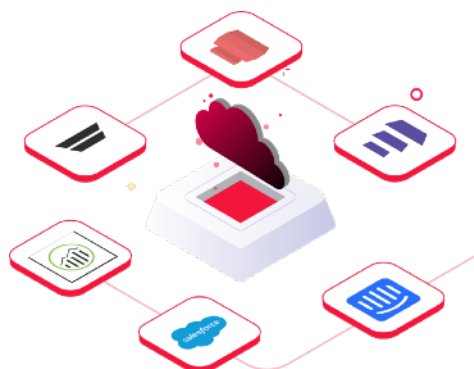
**VidReach**, for example, uses Appmixer to let their customers personalize lead generation, sales interactions, customer success communications, and employee coaching processes with automation via emAll, video, or phone – all in one platform. 🙌





# App Integration

Use Appmixer to integrate 3rd party cloud apps into your web applications. Next to the 50+ connectors Appmixer already has available for you, we also provide you with a framework to develop integrations in a fraction of the usual API integration time. Moreover, thanks to the standard interface, you'll be able to replace integrations in minutes.

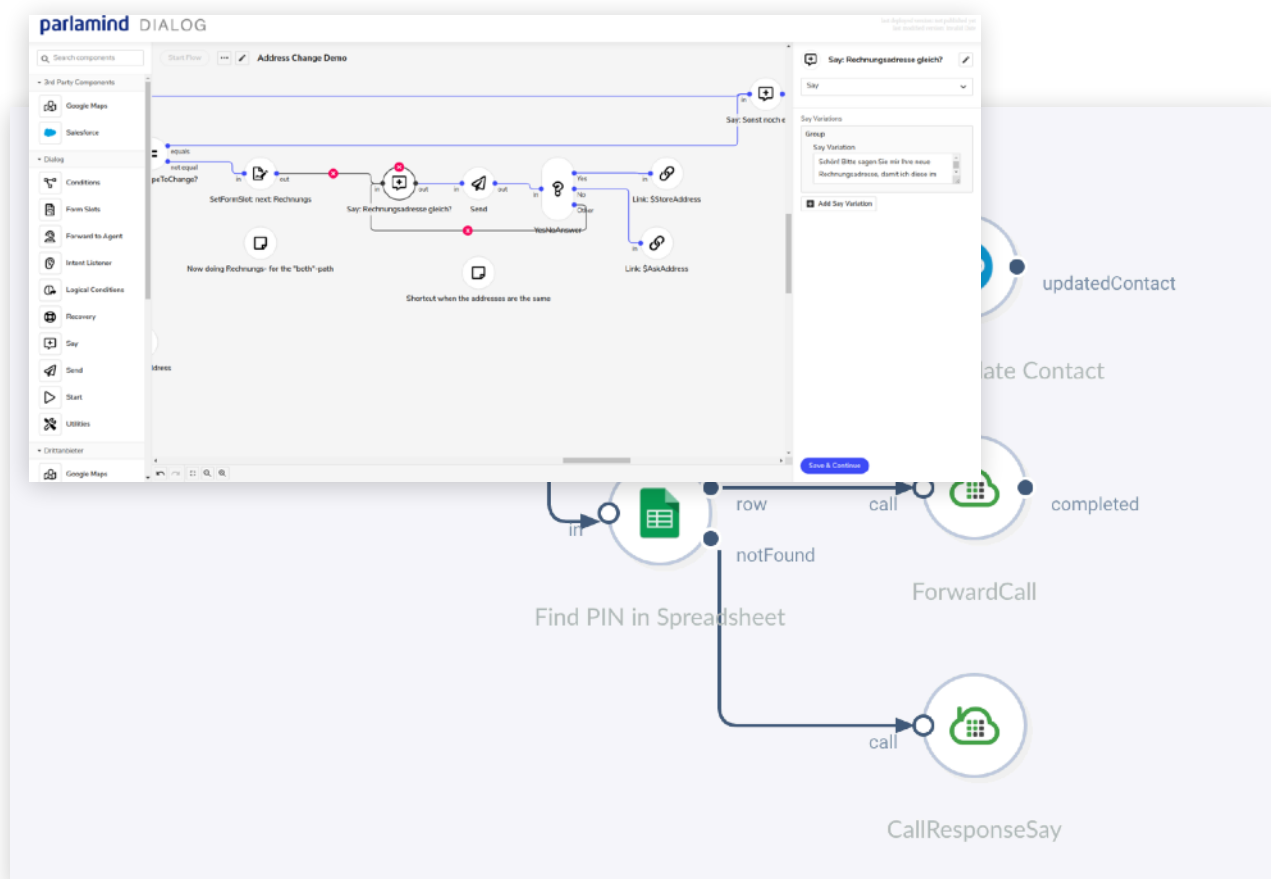


[See All Connectors](#)



# IVR

Build your own custom IVR (Interactive Voice Response) systems through Appmixer, which gives you both UI, including drag & drop designer for IVR flows, and backend engine, to process calls using any of the cloud communications platforms such as [Twilio](#), [Plivo](#) or your own. Appmixer even provides ready-to-use connectors for both of these platforms. But if these are not the ones you need, other platforms can be easily used too, by implementing a few custom connectors.



# ETL

Appmixer is used as an ETL (Extract-Transform-Load) middleware for companies as both front-end, and data messaging and workflow connector to their data transformation and extraction systems.

For example, the Big Data processing company [Sciera](#) uses Appmixer in their [Pulz product](#).



The screenshot displays the Appmixer ETL workflow editor. On the left, there are two main panels: 'Input & Output' and 'Data Manipulation'. The 'Data Manipulation' panel includes icons for Calculation, Data Cleansing, Date, Find, and Linker. The central canvas shows a workflow diagram with components: dFileDropbox (out), Concat (in), RowSplit (out), Split (in), RowMerge (out), and WriteFileDropbox (out). On the right, the configuration panel for the 'RowSplit' tool is visible, showing the 'Concat' output, 'Column name' set to 'firstLabel.fullAddress', and 'Delimiter list (Optional)' set to '&'. The 'Advanced Options' are set to 'False'.

# Would you like to know how Appmixer can help **your product**?

Then request a demo from our industry experts who will be able to help you understand the benefits of Appmixer for your business.

[Get a demo](#)

Or contact us: [info@appmixer.com](mailto:info@appmixer.com)  
[appmixer.com](https://appmixer.com)

Let us help you grow your AI SaaS product.



# About the Author



**David Durman**  
CEO @appmixer



David Durman is the CEO @client IO, the vendor behind Appmixer Embedded iPaaS and Rappid, HTML 5 diagramming framework. He has been developing software since he was 13 years old. Following his MSc. degree in artificial intelligence and modelling and simulation, Durman held multiple leading jobs in the Software R&D and founded client IO—a company specializing in visual and workflow automation technology to help people be more creative and productive. He is also a passionate cider maker.

