Checklist on How to Launch a Visual Automation Builder for your **UCaaS Business** with a **Real Case Study**
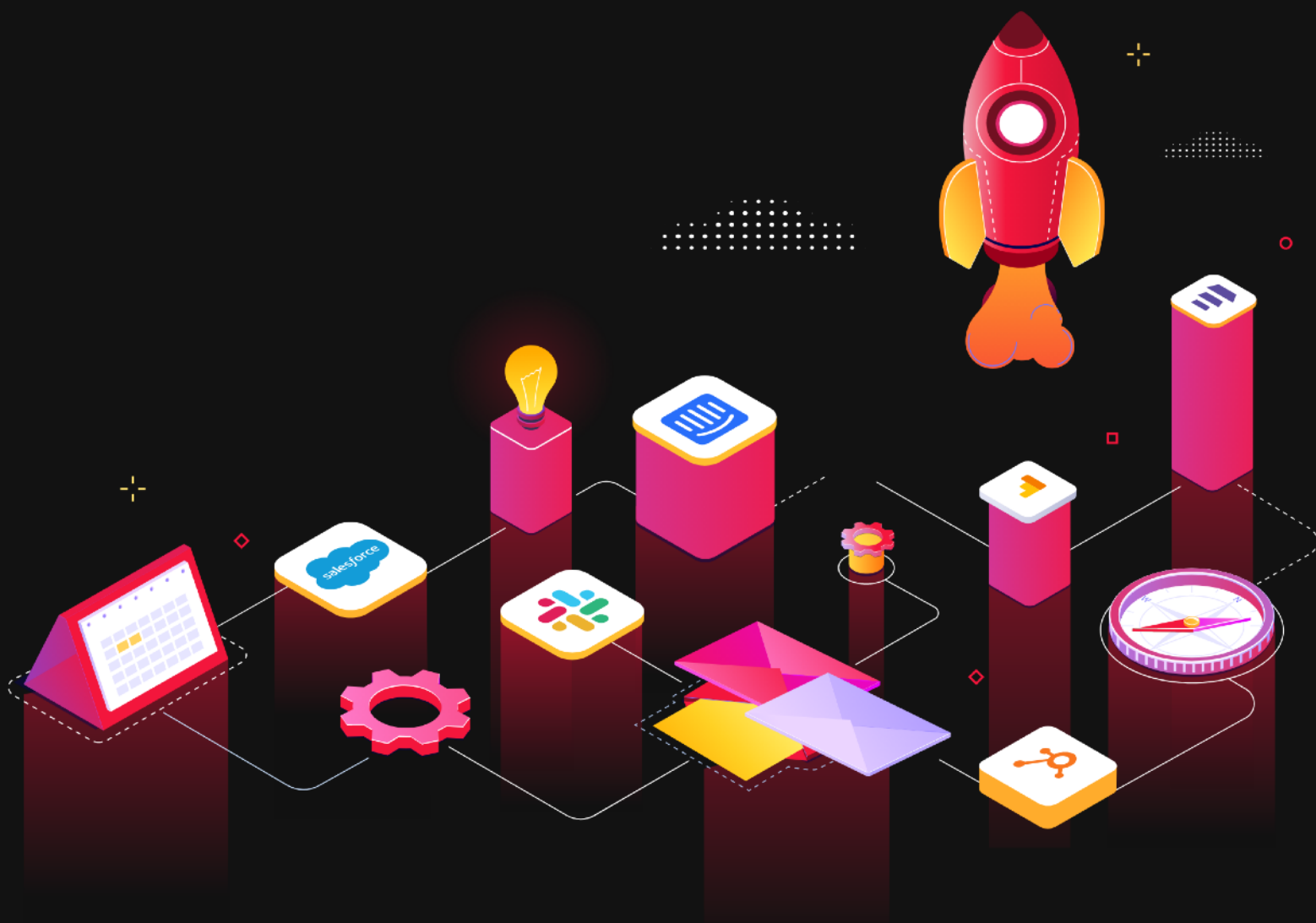
Content

You can launch a visual integration builder to your UCaaS product by following 6 simple steps

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- Purchase and Download
- Install the Tool
- Embed
- Customize
- Launch

- Workflow Automation
- App Integration
- IVR
- ETL

Intro

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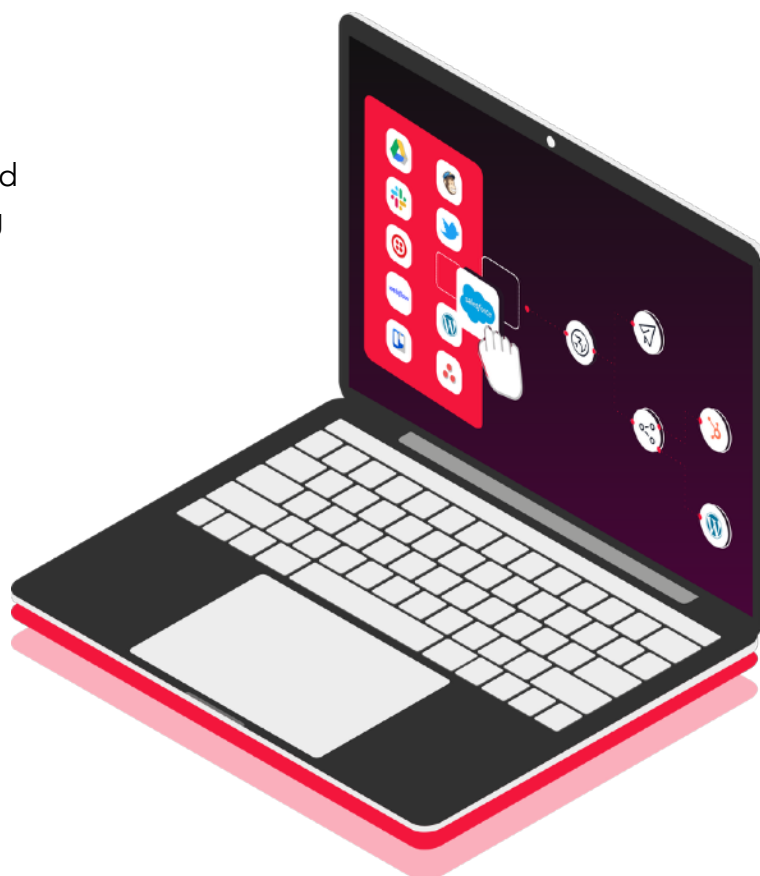
This ultimate checklist will help you through all the steps to implement a visual workflow automation builder to your UCaaS product, **guiding you to understand what you need to successfully implement this tool to your existing product** and how long it will take you to do so.

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 ✔️

1. Choose a platform

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

o **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. If you think that each user has different needs, they also need different connectors.

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.

o **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!**

Real Life Case

Check now how parlamind nailed the checklist

parlamind

To help you better comprehend how to implement these steps and what were the results, we spoke to parlamind – a UCaaS company that works on automation of customer service.

They followed the checklist and implemented this workflow automation system to their product, and were ready to share their experience with us.
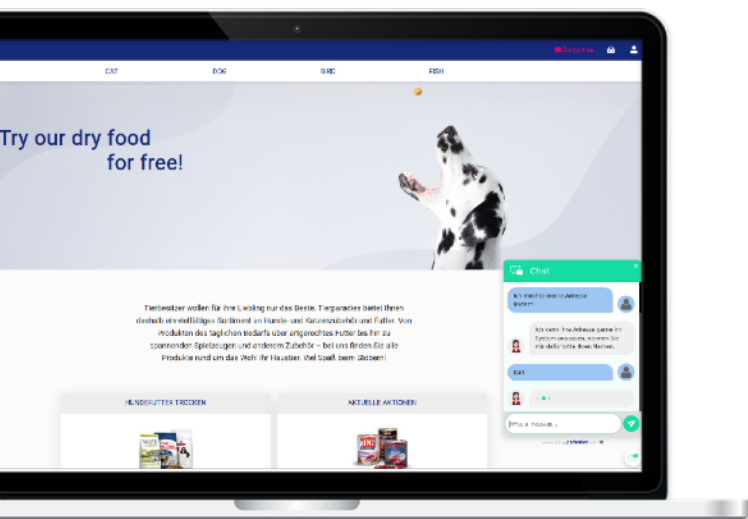
Read further about their experience through the process and why they chose Appmixer 👉

The Product

parlamind is delivering the automation of emails and ticketing systems, but recently they have decided to venture towards chatbots and voice bots. They are currently working on a product that allows their customers to build their own chatbots, giving their users the freedom to customize them at will.

The Challenge

Their biggest challenge was to implement no-code solutions and platforms for their users, as this was their customer's biggest demand. Visual workflow automation builder seemed to be the best solution. After some research, they discovered that Appmixer was the perfect tool for them, as it already solved many of their problems. So, instead of home-brewing a solution, they chose to go ahead with Appmixer.

The Solution

Designer/builder with a lot of structure and ideas that helped parlamind provide their users with the best experience. In their dialogue project, they mainly use Appmixer's frontend, specifically the designer itself and everything that is around it, such as the component definition, the API, how to get the flows in and out, among others. parlamind thought that their greatest advantage was not having to build the UI from scratch, but only configure an existing one.

parlamind went through all the steps in our checklist in order to implement the software to their product. Read below about their experience through each step and why they chose **Appmixer.**

1. Choosing the platform 🤔

The platform choice was particularly hard for parlamind.

> It took a really long time to decide whether to go with a homebrew or Appmixer. Our platform requirements were a few pages long, but in the end Appmixer was the right choice.

Leon Wilmanns | Product Owner NLP at parlamind GmbH

2. Purchase and Download 💸

After the choice was done, it was time to buy and download. Appmixer offers their clients the chance to use their product and pay by invoice. Once you contact them and choose to purchase the software, their experts will send you a link to the Appmixer's SDK where you can download and prepare for installation. Appmixer firstly provided parlamind with a demo where they could extensively play with, both locally and on a server, which took them a month, after some extensions offered by Appmixer to ensure that they were happy with the product.

Ultimately, they liked how flexible Appmixer is and that its parts are nicely separated, allowing them to use just the UI if they wanted to. Even so, it was not an easy decision, which involved 7 people ranging from decision makers to frontend and backend developers. But the beauty of Appmixer is precisely that it already provides many connectors prepared for them and they can easily create custom connectors, freeing up time from their developers. **See all the existing connectors for Appmixer** 👇🏻

Appmixer Components

3. Installing the Tool ⚙️

The installation process for parlamind was divided into three steps: running the docker containers locally, which for them was quick and easy; the command-line tool, which they successfully did with the support of our experts; and customizing the front end. Appmixer lets you integrate it to your frontend as fast as adding 5 lines of code into your product. It also permits you to customize almost everything that the user sees in the builder such as shapes, colors, fonts, and many more. However, parlamind decided to not change anything.

"I really like the UI - looks like Swiss design or material design, we didn't have to change anything at all, although I know it's possible"

- Leon Wilmanns
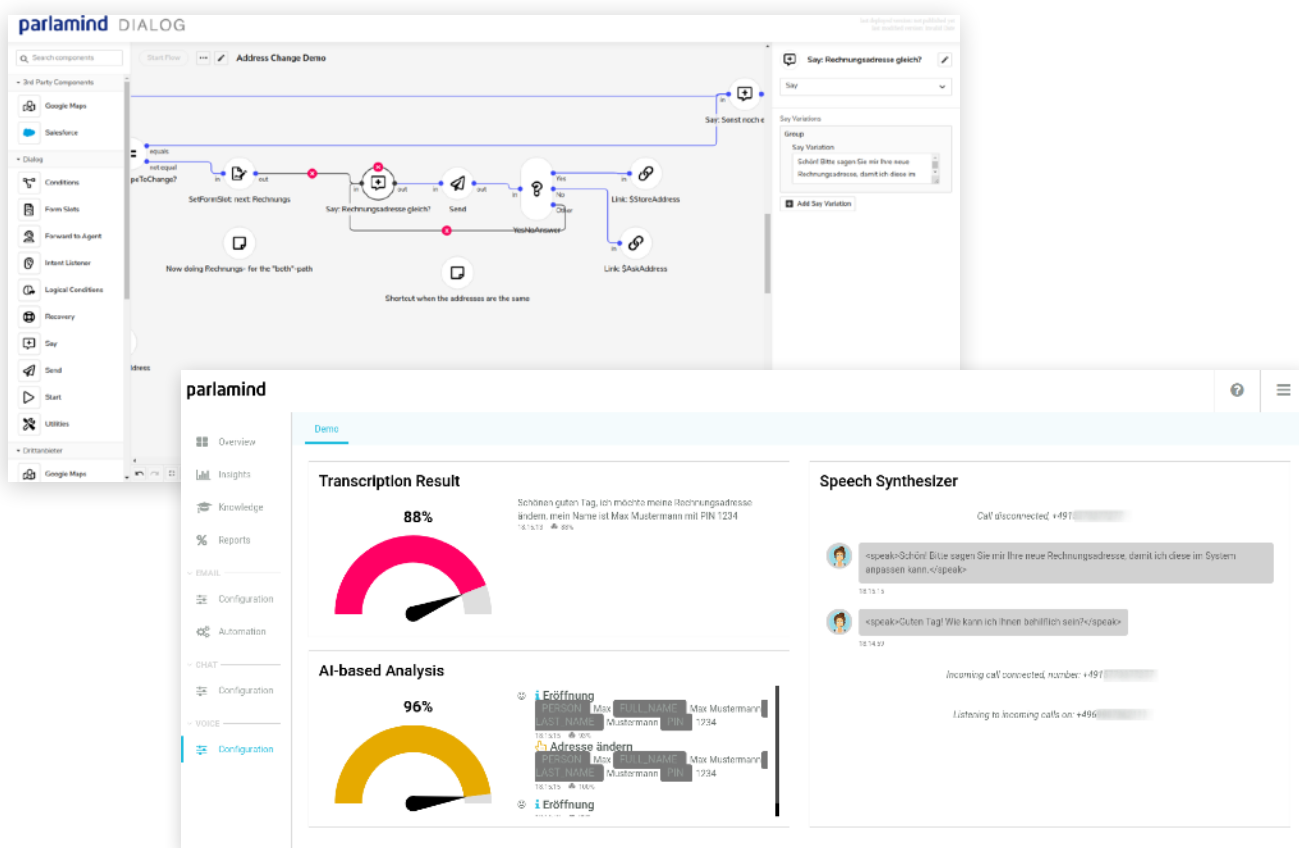
4. Launch 🚀

parlamind is planning on launching their first app in production this month, and we can't wait to hear about it.

This company really enjoyed how easy, fast and simple it was to set it up locally using Docker.

Wilmanns stated:

"What I really like is the speed you gain once you know the basics of writing the components configurations. I was able to do it myself and in a few days I wrote 20 components."

Appmixer has made their lives easier in different aspects. Firstly, they believe this tool allows them to be quicker as the no code solution takes less time while implementing, faster change cycles and potentially self-service. Secondly, they use it in order to train people, who otherwise would not know how, to write dialogues.

"The other factor is that people expect these things nowadays. They see those designers elsewhere and they want them too,"

It also made it easier to visualize the chatbots and understand how the conversation can turn to possible outcomes.

"Here we can use Appmixer as a mind-mapping tool, but it's much closer to the real thing"

For parlamind, their main focus when acquiring this tool was to help their customers to be more self-sufficient. They believe that it is expected from them to offer this platform and they are not wrong. Their main goal now is to offer, in 90% of the cases, internal components, but they are working on some customer-specific integrations that will help them personalize it even more.
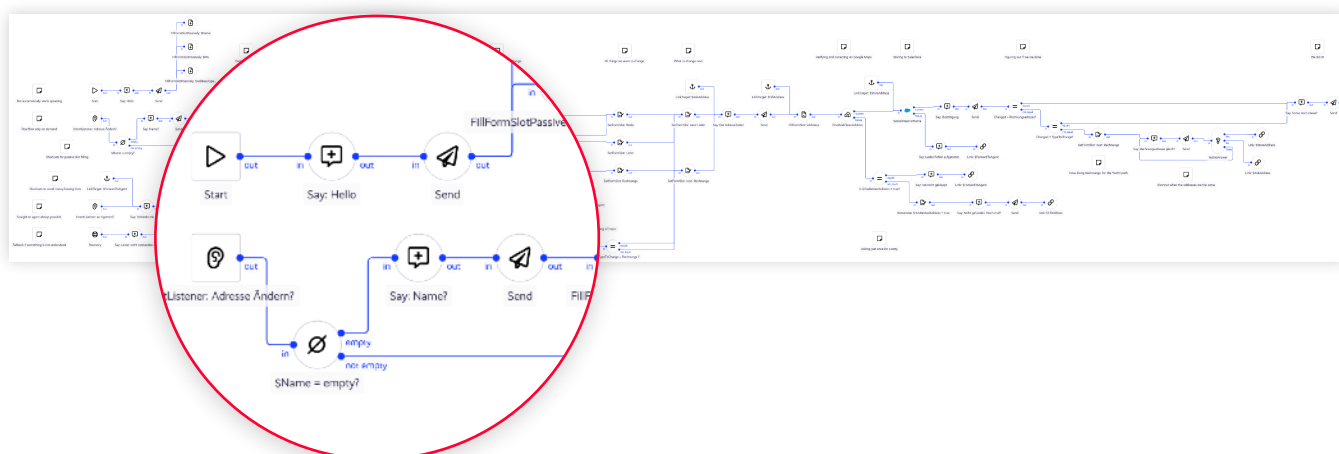
How Appmixer Works

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 email, video, or phone – all in one platform. 👇
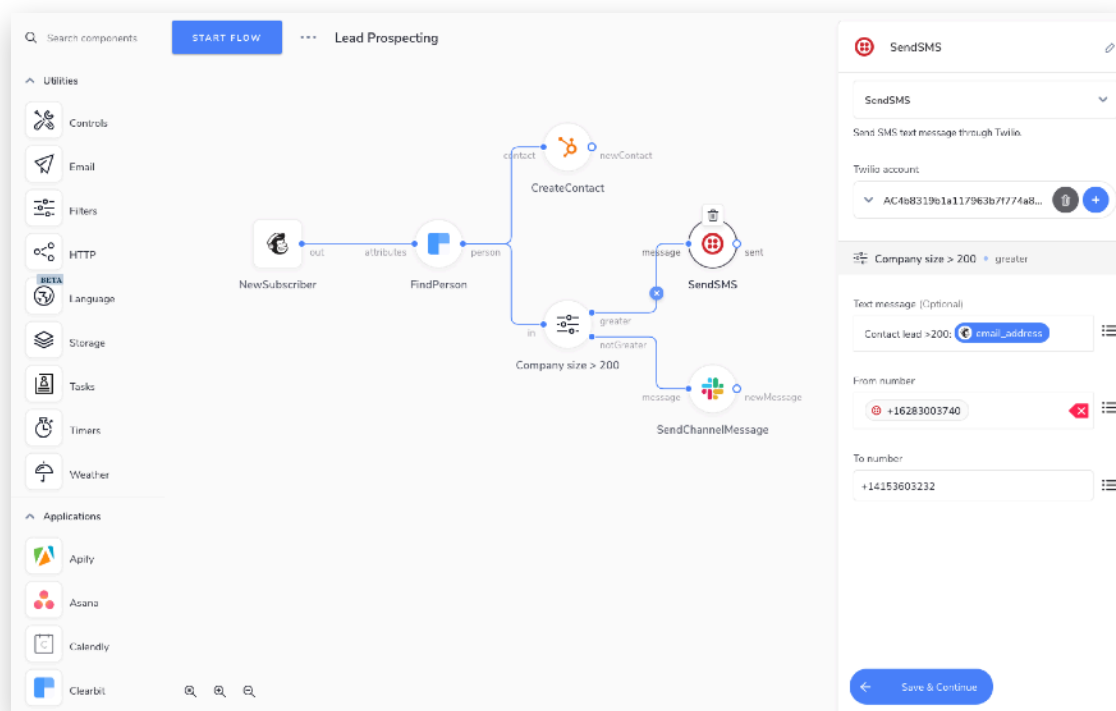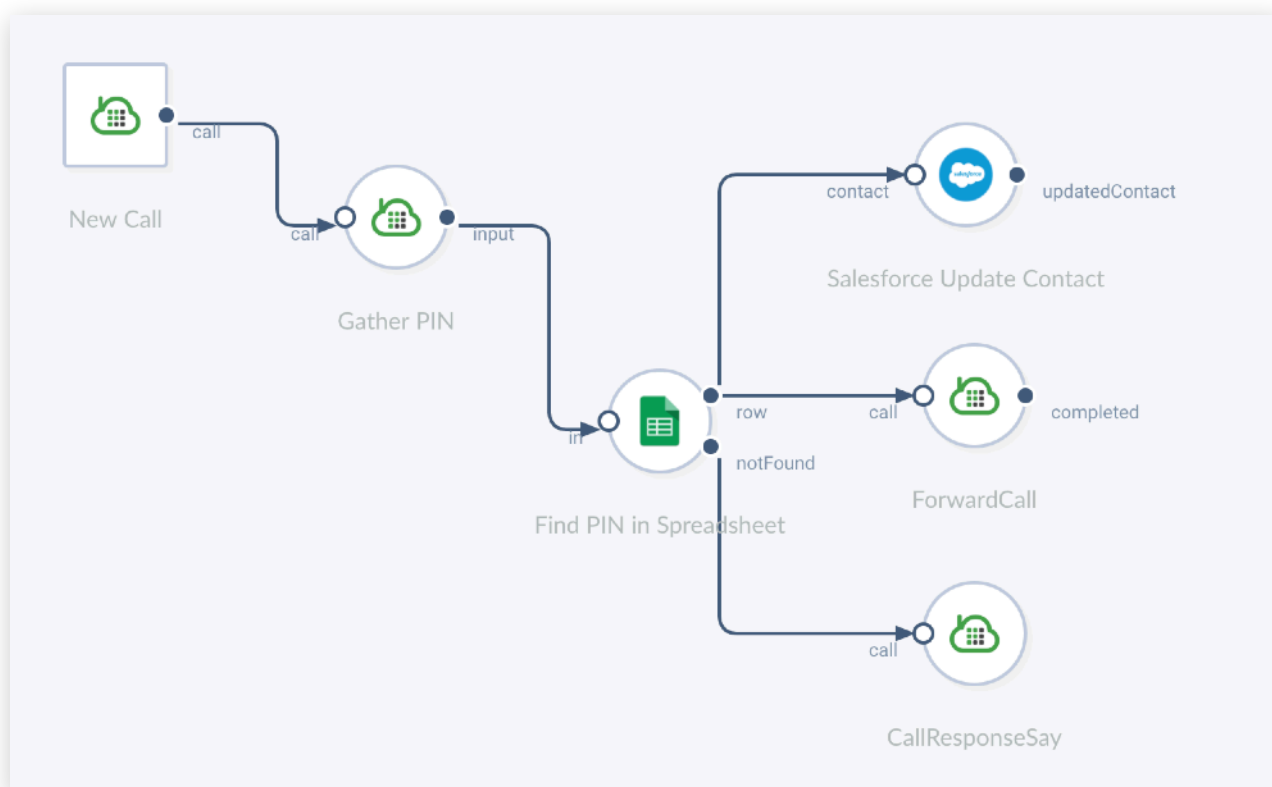
App Integration

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.
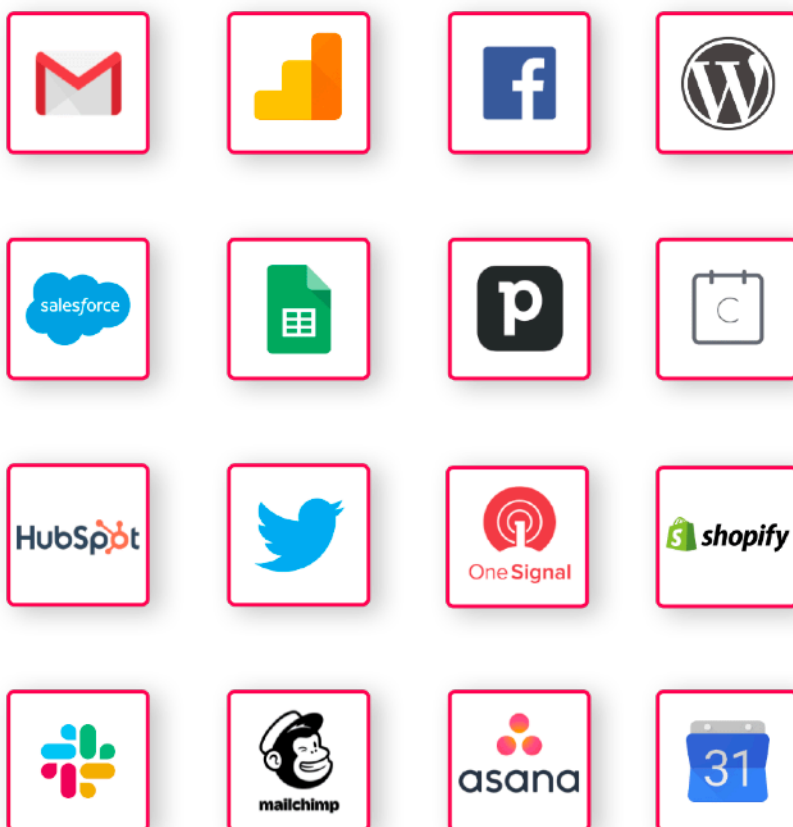
See All Connectors

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.
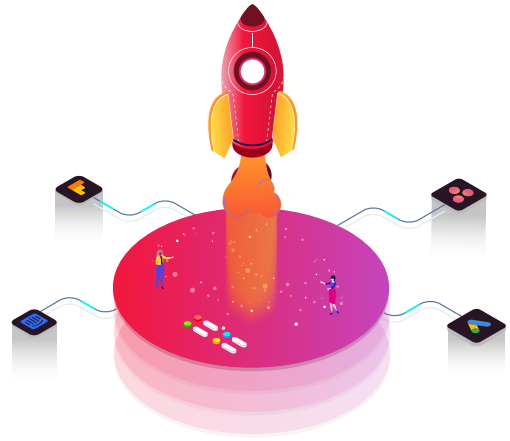
New Call — call — Gather PIN — input — Find PIN in Spreadsheet — row / notFound

Salesforce Update Contact — contact — updatedContact

ForwardCall — call — completed

CallResponseSay — call

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.

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.
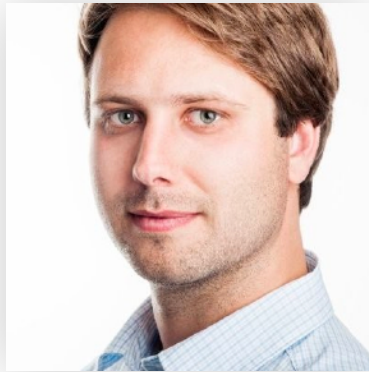
Get a demo

Or contact us: info@appmixer.com
appmixer.com

Let us help you grow your UCaaS product.

appmixer

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&Dand 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.

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