Customer.io – SMS & CHAT APPS INTEGRATION

How To Get Started

Customer.io is a marketing automation platform which allows you to create data-driven email, push, in-app, SMS or chat apps to engage customers where they are.

It brings customer insights, journey orchestration, and omnichannel communication.

With Mitto integration clients can send **Campaigns and build journeys using our API inside customer.io for SMS and chat apps (such as WhatsApp Business, Viber for Business, etc). In this guide we will explain how to set it up.**

PART 1

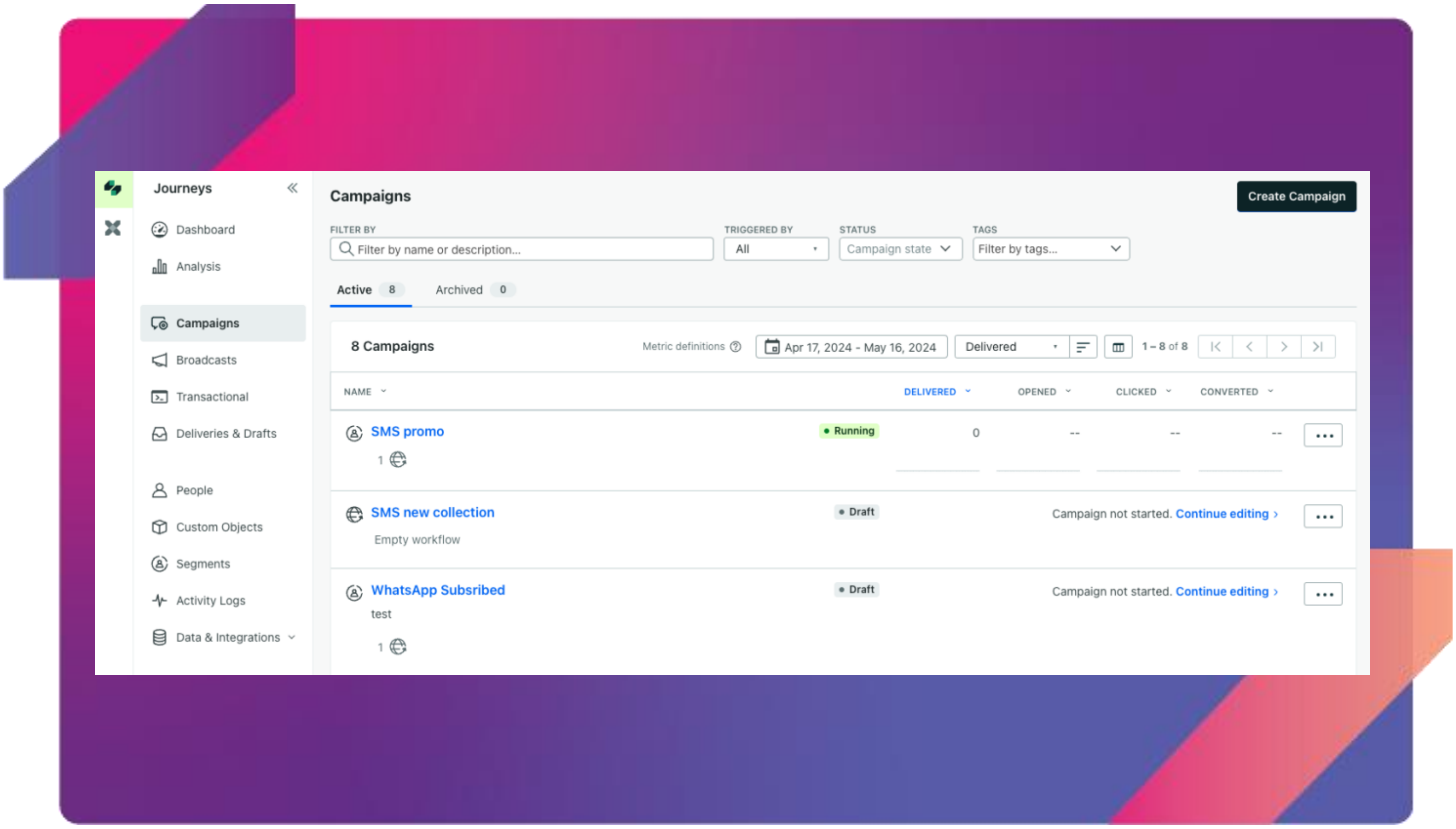
MITTO INTEGRATION

Mitto integrations enable Customer.io users to **send SMS and chat apps messages** to communicate with leads and contacts using their Mitto account.

For sending messages from Customer.io platform, **there is no need for specific installation** steps.

Navigate to Campaigns and start crafting. You will need to **use Mitto API** inside the Customer.io campaign builder **for the channel you prefer**.

- **Guide –** How to create Mitto account and find API keys
- **Guide** – How to create WhatsApp templates



Campaigns

FILTER BY: Filter by name or description... | TRIGGERED BY: All | STATUS: Campaign state | TAGS: Filter by tags...

Active 8 | Archived 0

8 Campaigns | Metric definitions | Apr 17, 2024 - May 16, 2024 | Delivered | 1 – 8 of 8

NAME		DELIVERED	OPENED	CLICKED	CONVERTED
SMS promo 1	Running	0	--	--	--
SMS new collection Empty workflow	Draft	Campaign not started. Continue editing ›			
WhatsApp Subsribed test 1	Draft	Campaign not started. Continue editing ›			

PART 2

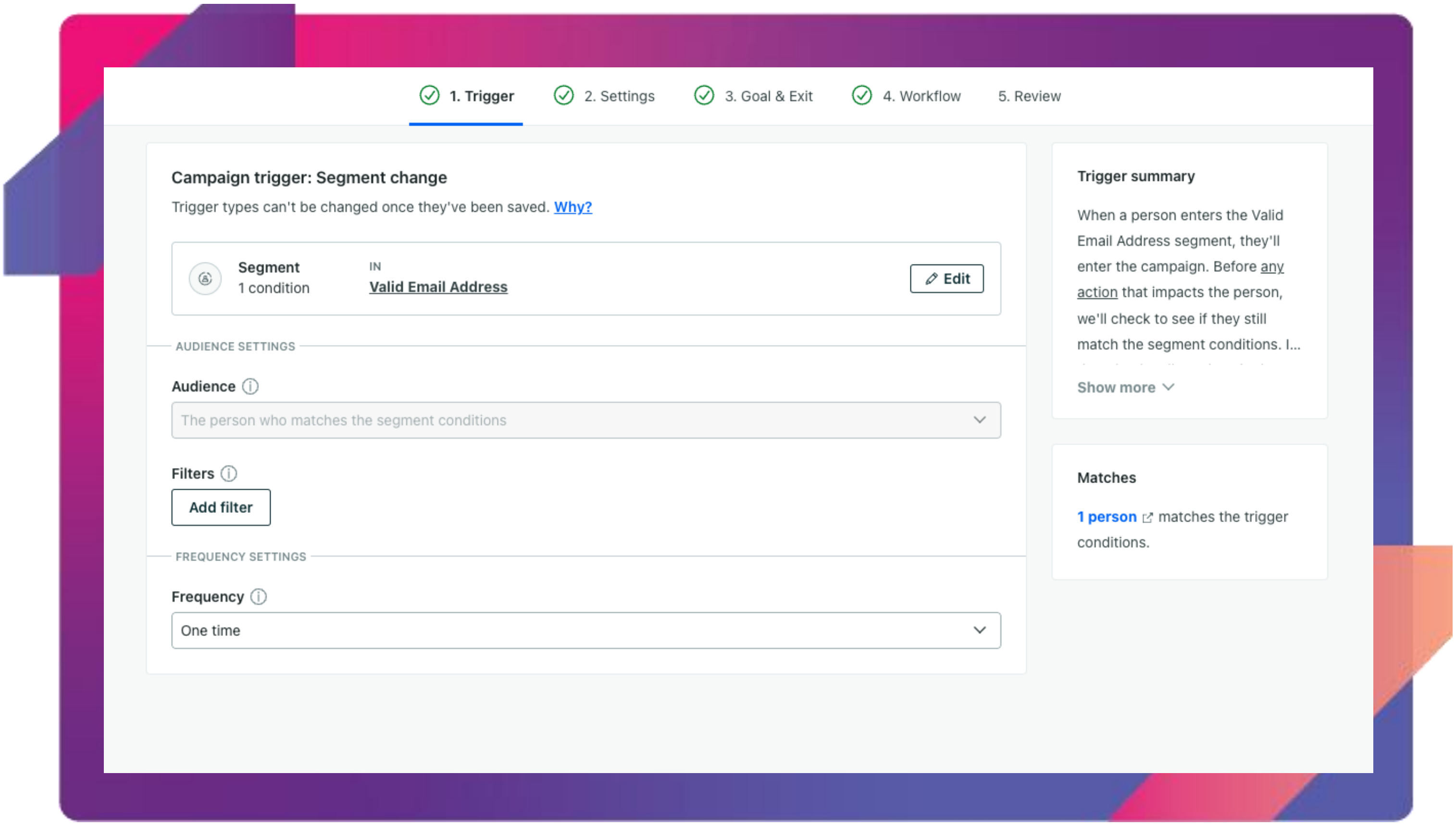
SENDING MESSAGES

Prepare your contacts and lists for campaigns.

- Go to **Segments – create lists for targeting the right people.**

Navigate to Campaigns and click New Campaign. First steps will be the same for all channels.

- First step is to set up **Trigger.** Choose who is your audience and the frequency for entering the campaign.



Campaign trigger: Segment change

Trigger types can't be changed once they've been saved. Why?

Segment
1 condition
IN
Valid Email Address

AUDIENCE SETTINGS

Audience: The person who matches the segment conditions

Filters

FREQUENCY SETTINGS

Frequency: One time

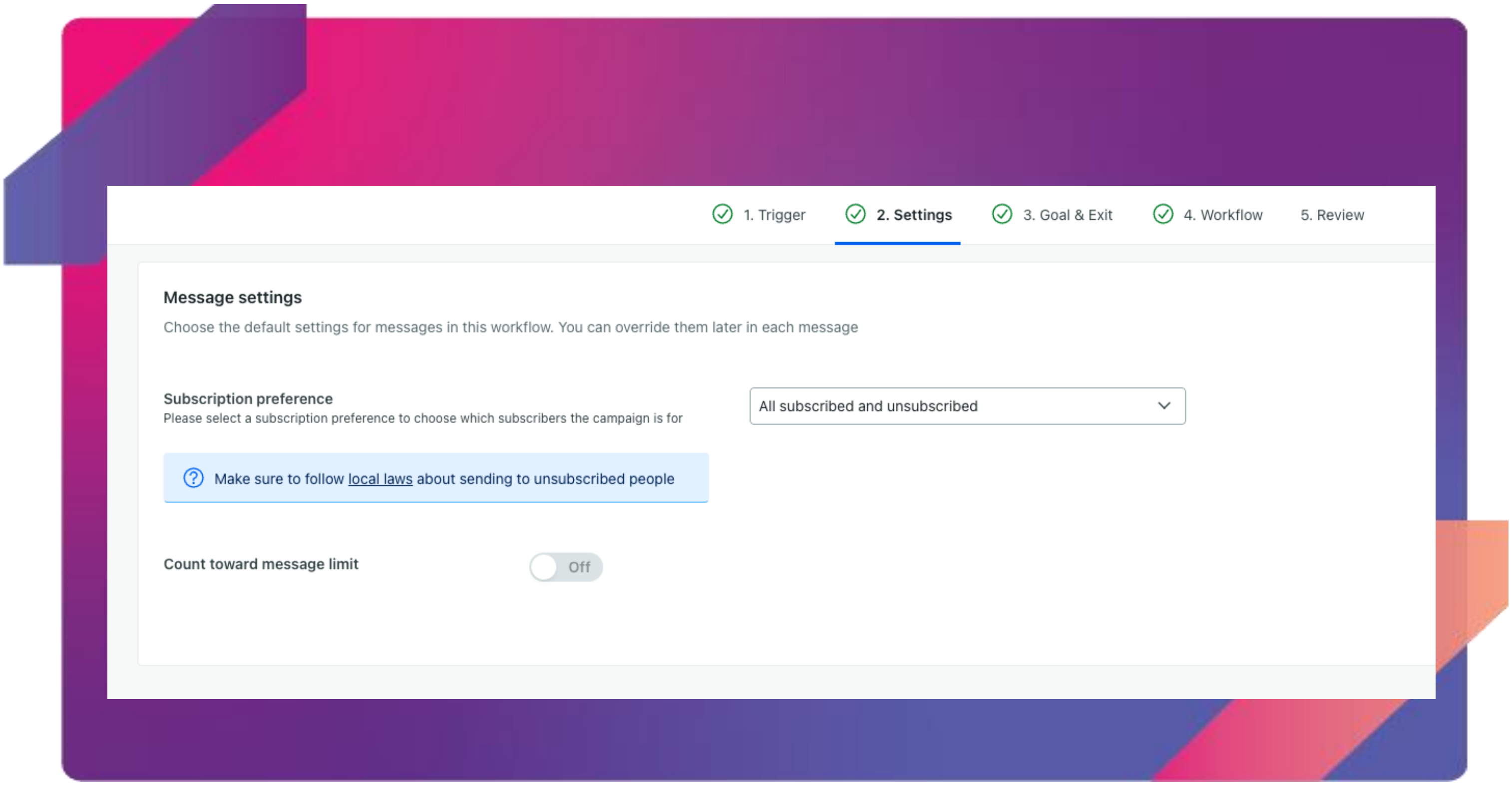
Trigger summary

When a person enters the Valid Email Address segment, they'll enter the campaign. Before any action that impacts the person, we'll check to see if they still match the segment conditions. I...

Matches

1 person matches the trigger conditions.

- Second step is to set up **Message settings** and what type of contacts will get enrolled.



Message settings

Choose the default settings for messages in this workflow. You can override them later in each message

Subscription preference

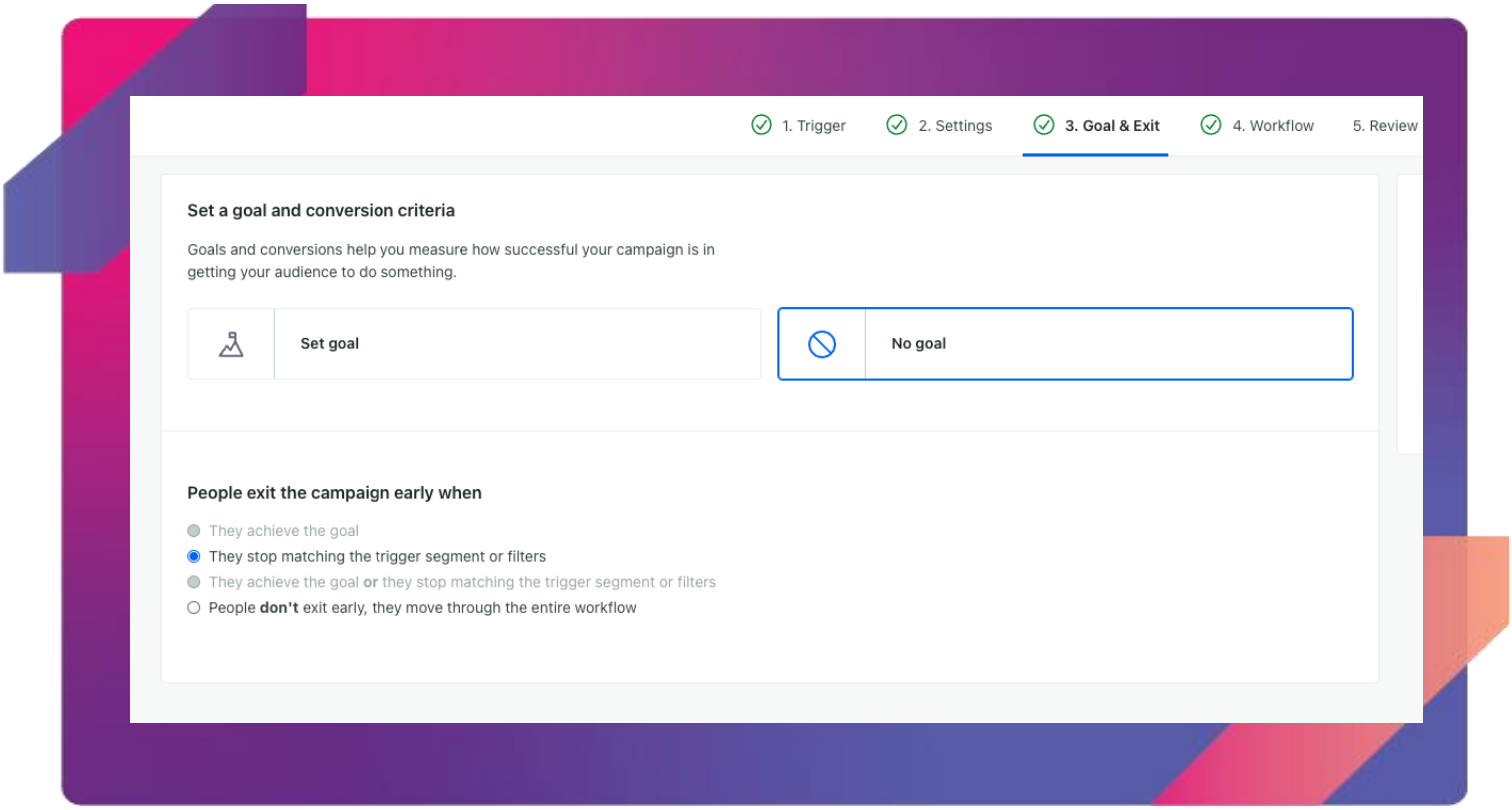
Please select a subscription preference to choose which subscribers the campaign is for

All subscribed and unsubscribed

Make sure to follow local laws about sending to unsubscribed people

Count toward message limit: Off

- Third step is to set up **Goal and Exit conditions**.



Set a goal and conversion criteria

Goals and conversions help you measure how successful your campaign is in getting your audience to do something.

Set goal

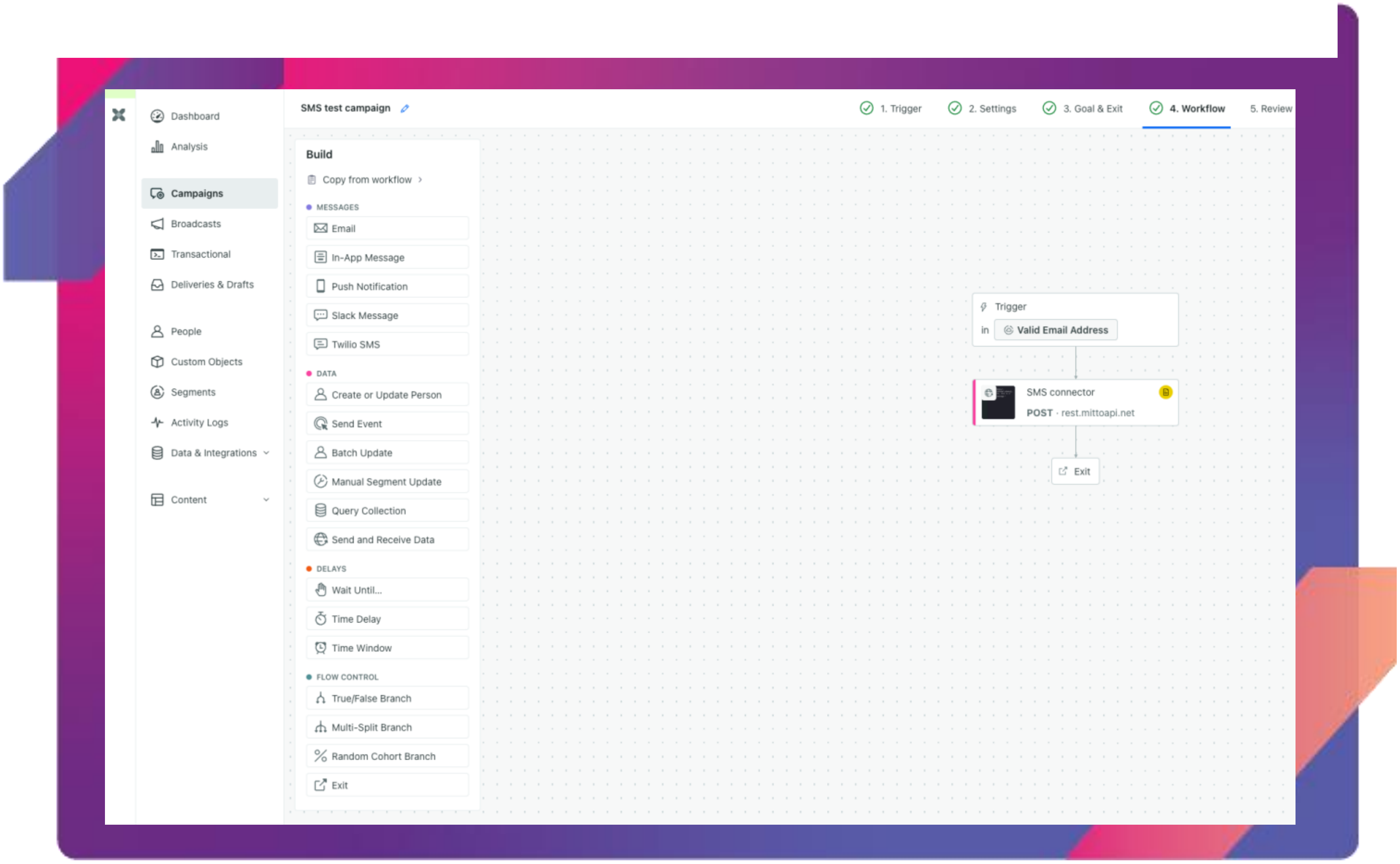
[✓ No goal]

People exit the campaign early when

○ They achieve the goal
● They stop matching the trigger segment or filters
○ They achieve the goal **or** they stop matching the trigger segment or filters
○ People **don't** exit early, they move through the entire workflow

Now it’s time to create the message for your campaign. First we will describe SMS scenario.

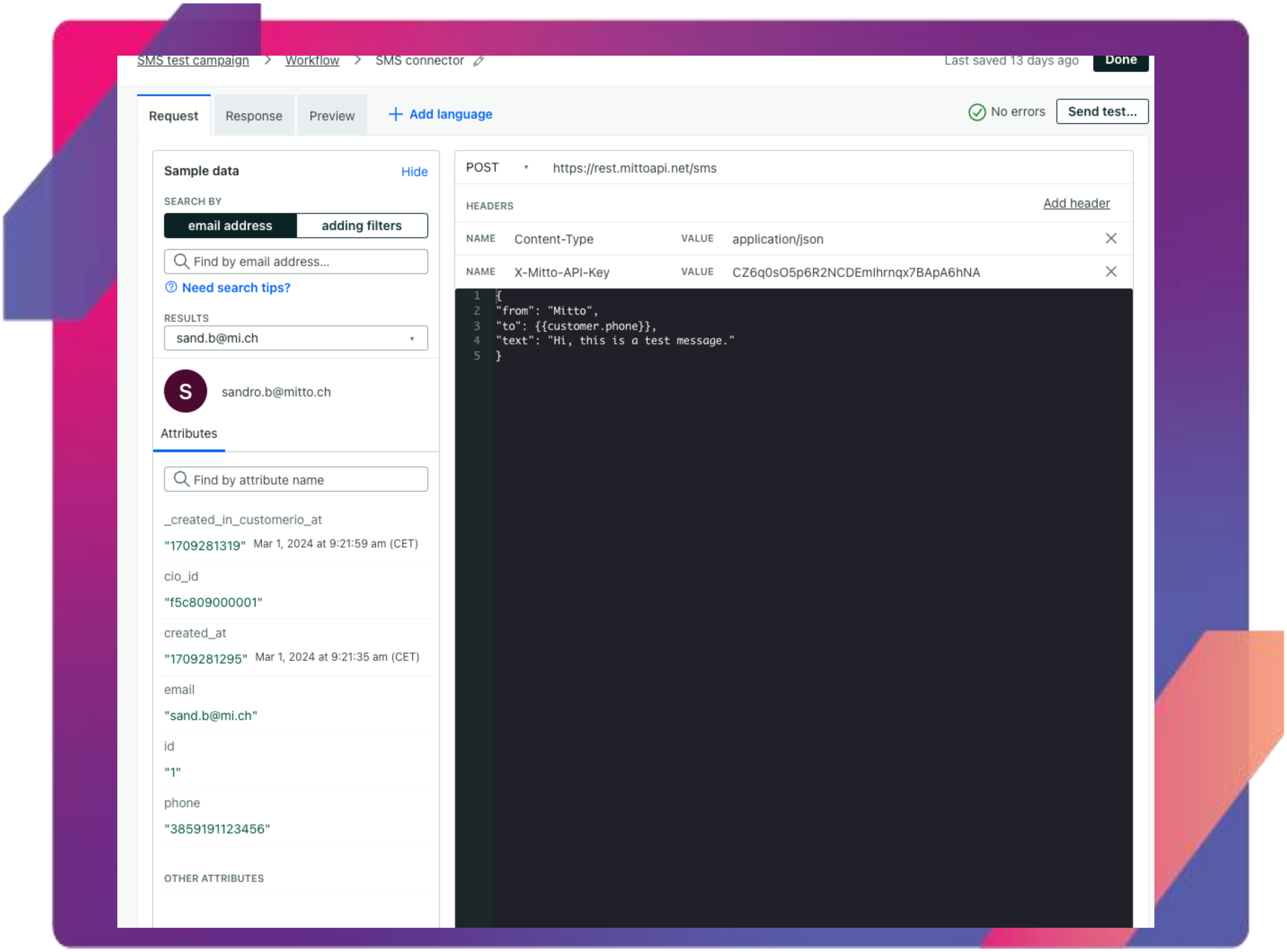
- Your workflow is created in this step. To send a message **you need to choose Send and Receive Data from the Data section. Click on that step and edit message.**



- Now you need to use Mitto SMS API to set it all up. Choose **POST** from the dropdown and enter link: https://rest.mittoapi.net/sms

- Set up headers sections, enter:
  - **Content-Type – application/json**
  - **X-Mitto-API-Key – enter your personal Mitto API key**

- Create a **message body and other parameters inside the code.**



sand.b@mi.ch

sandro.b@mitto.ch

_created_in_customerio_at	"1709281319" Mar 1, 2024 at 9:21:59 am (CET)
cio_id	"f5c809000001"
created_at	"1709281295" Mar 1, 2024 at 9:21:35 am (CET)
email	"sand.b@mi.ch"
id	"1"
phone	"3859191123456"

POST https://rest.mittoapi.net/sms

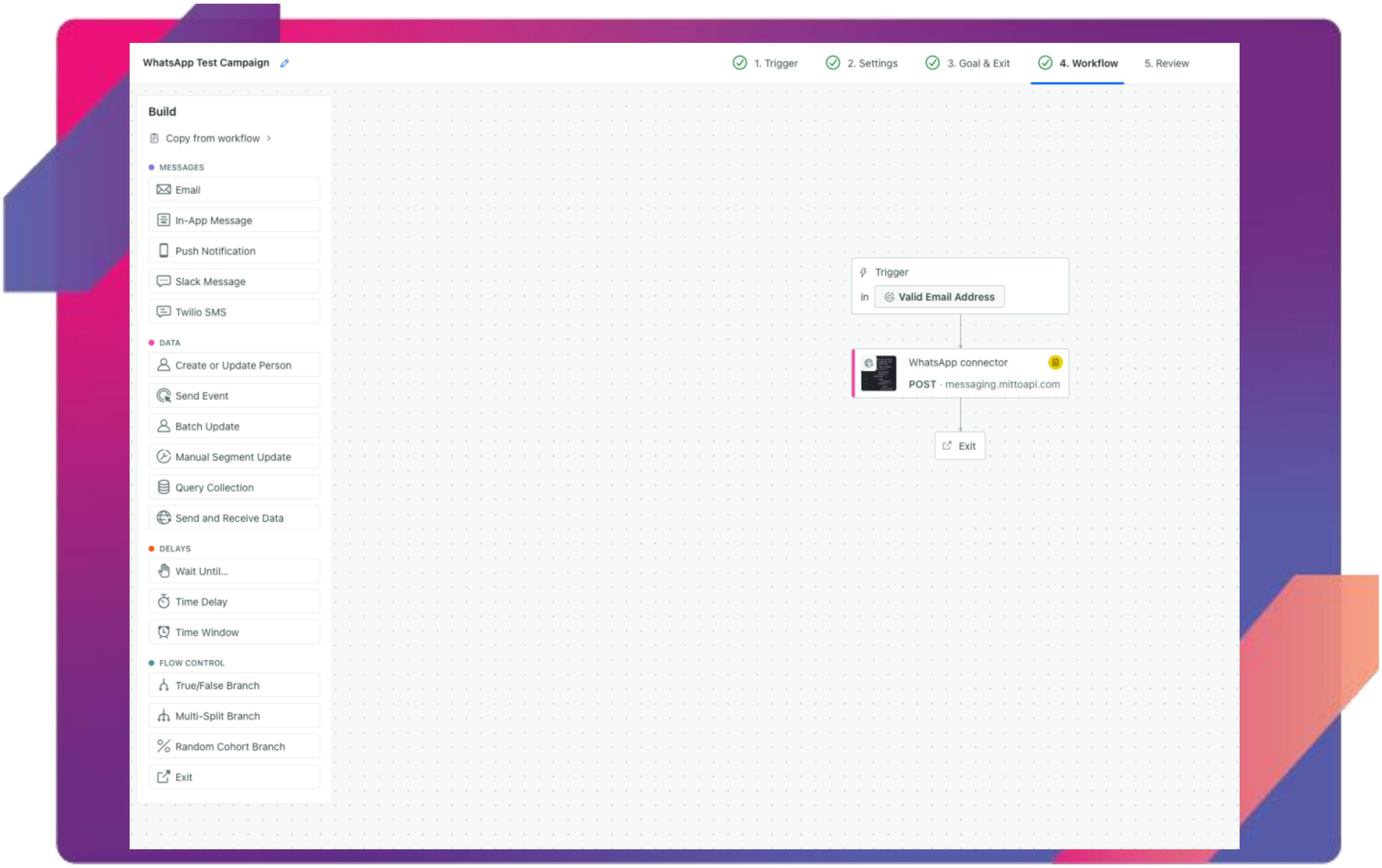
NAME		VALUE	
NAME	Content-Type	VALUE	application/json
NAME	X-Mitto-API-Key	VALUE	CZ6q0sO5p6R2NCDEmlhrnqx7BApA6hNA

```
{
"from": "Mitto",
"to": {{customer.phone}},
"text": "Hi, this is a test message."
}
```

Mitto SMS API reference is available here: https://docs.mitto.ch/sms-api-reference/

Now we will show you how to create message for chat apps – example WhatsApp Business.

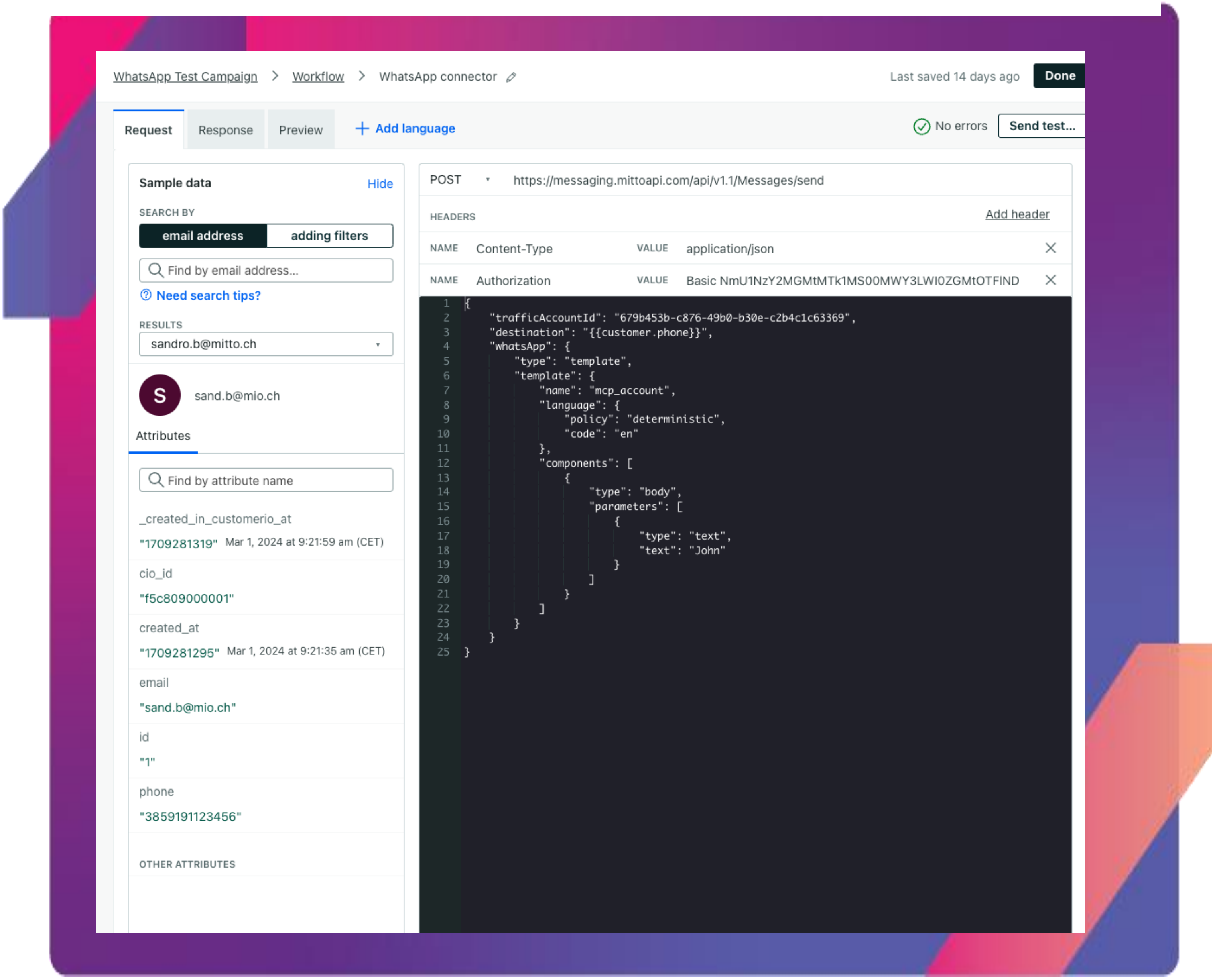
- Your workflow is created in this step. To send a message **you need to choose Send and Receive Data from the Data section. Click on that step and edit message.**



- Now you need to use Mitto chat apps API to set it all up. Choose **POST** from the dropdown and enter link: https://messaging.mitoapi.com/api/v1.1/Messages/send

- Set up headers sections, enter:
  - **Content-Type – application/json**
  - **Authorization – enter your personal API key**

- Keep in mind that you need to respect the rules per each chat app. For **WhatsApp, you can use your registered templates here.**
  - Define parameters inside the code – add trafficAccountId, set up destination (these can be numbers or simply a customer.io variable like "{{customer.phone}}" which will use numbers from the segment), insert template name and its parameters



sandro.b@mitto.ch

S sand.b@mio.ch

_created_in_customerio_at
"1709281319" Mar 1, 2024 at 9:21:59 am (CET)

cio_id
"f5c809000001"

created_at
"1709281295" Mar 1, 2024 at 9:21:35 am (CET)

email
"sand.b@mio.ch"

id
"1"

phone
"3859191123456"

POST https://messaging.mittoapi.com/api/v1.1/Messages/send

NAME	Content-Type	VALUE	application/json
NAME	Authorization	VALUE	Basic NmU1NzY2MGMtMTk1MS00MWY3LWI0ZGMtOTFIND

```
{
    "trafficAccountId": "679b453b-c876-49b0-b30e-c2b4c1c63369",
    "destination": "{{customer.phone}}",
    "whatsApp": {
        "type": "template",
        "template": {
            "name": "mcp_account",
            "language": {
                "policy": "deterministic",
                "code": "en"
            },
            "components": [
                {
                    "type": "body",
                    "parameters": [
                        {
                            "type": "text",
                            "text": "John"
                        }
                    ]
                }
            ]
        }
    }
}
```

Mitto API reference for chat apps is available here.

mitto