

Engagix

User Guide

Your complete guide to getting started with **Engagix** — from account creation to sending your first WhatsApp campaign.

What is Engagix?

Engagix is a WhatsApp Business automation platform built by **Skill Bridge Technologies**. It helps businesses:

- Send bulk WhatsApp campaigns to thousands of contacts.
- Build automated chatbot flows (no coding required).
- Manage customer conversations from a unified inbox.
- Track message delivery, read rates, and campaign performance.
- Integrate with your existing business tools.

Getting Started

Step 1 — Create Your Account

- Visit the Engagix signup page.
- Enter your first name, last name, email, phone number, and password.
- Click Sign Up.
- You'll be redirected to the onboarding wizard.

Step 2 — Onboarding

The onboarding wizard guides you through 6 setup steps:

- Contact Information — Business email, phone number, website (optional).
- Verify Meta Account — Connect your Meta Business Account.
- Business Details — WhatsApp number, monthly volume, go-live date, privacy policy URL, GST (if applicable).
- Organization Name — Set your organization/company name.
- WhatsApp Setup — Connect your WhatsApp Business Account.
- Choose Your Plan — Self-Managed or Managed.

Explore Your Dashboard

Section	Purpose
Dashboard	Overview of messages, contacts and activity
Chats	Live inbox
Contacts	Manage contact lists
Campaigns	Create and send campaigns
Flows	Build chatbot flows
Templates	Manage message templates
Settings	Account & WhatsApp configuration

Choose Your Plan

Option	Description
Self-Managed (Recommended)	You pay Meta directly for message delivery. Pay Engagix only for the platform.
Managed	Coming soon — Engagix handles Meta billing under one invoice.

Sending Your First Message

Option A — Quick Message

- Open Chats.
- Click New Chat.
- Select a contact or phone number.
- Send within 24-hour window or use an approved template.

Option B — Template Message

- Open Chats.
- Click Template.
- Choose an approved template.
- Fill variables and Send.

Launching Your First Campaign

Campaign Steps

- Import Contacts and create a Contact Group.
- Ensure the campaign template is approved by Meta.
- Create Campaign and fill campaign name, template, contact group, and schedule.
- Preview and Launch Campaign.

Campaign Monitoring

Track Results

- Sent — Messages dispatched.
- Delivered — Reached customer phone.
- Read — Customer opened the message.
- Failed — Message couldn't be delivered.

Plans & Billing

Plan	Price	Credits	Team	Features
Starter	■999	800	3	Unlimited campaigns + AI Assistant
Pro	■1,499	1,500	5	Product Search, Promo AI, 90-day history
Premium	■1,999	2,200	10	Everything unlimited + Dedicated support

Note: In Self-Managed mode, Meta charges separately for WhatsApp conversations.

How to Subscribe

Subscription Steps

- Go to Settings → Billing.
- Select a plan.
- Review pricing summary.
- Complete payment.
- Subscription activates immediately.

Tips for Success

Do's

- Import only opted-in contacts.
- Keep templates clear and personalized.
- Reply within the 24-hour customer window.
- Monitor quality rating regularly.
- Start with small campaign batches.

Don'ts

- Don't spam contacts.
- Don't disguise marketing templates as utility.
- Don't ignore opt-outs.
- Don't send too many campaigns quickly.
- Don't overuse the same template repeatedly.

Need Help?

- support@skillbt.in
- In-app Support Chat
- Documentation inside Engagix Dashboard

About Engagix

Engagix is built and maintained by **Skill Bridge Technologies**. It helps businesses automate customer communication through WhatsApp Business.