Flow Builder - Understand the Protect Platform

📘 NOTE:

Select regional availability. This feature is currently available for customers with end users in select countries. To find out if this feature is available in your region, contact a Telesign expert.
This product is available for full-service accounts only.

Before you use the Protect Platform API and Flow Builder API to generate an access token and initialize the flow, you first need to use the Protect platform to create a flow. The Protect Platform houses Digital Intelligence products and features such as Flow Builder. It helps you build adaptive fraud protection workflows in a no-code manner using its platform and Flow Builder API to run an integration.

The Flow Builder section of the Protect platform is useful for a variety of other tasks besides creating flows such as managing a flow when you need to adjust it to suit your needs for a specific task or project. You can also use it view reports, and complete other administrative tasks.

Select the Flow Builder icon from the left menu to access it.

Tasks that you can do using the platform

Use the Flow Builder section to complete the following tasks which you can navigate to using the left sidebar menu in the Flow Builder platform.

- Flows
  - Create – Start the flow wizard to define name and request parameters.
  - Manage – List, filter, and operate on saved/activated flows.
- Templates – Reusable flow drafts.

- Reports
  - Executive report – Account-level KPIs and trends.
  - Live traffic – Near real-time executions.
  - Transaction Monitoring – Search, filter, and inspect individual transactions.
- Configuration
  - Services – Service catalog (HTTP integrations) and response mappings.
  - Configuration node – Authentication/config used by nodes.
  - Credentials Vault – Secure storage for secrets.

How work moves through a flow

1. A client system calls the Flow API with a JSON body (your request parameters).
2. The flow starts on the first node and moves along the connectors.
3. When a node finishes, conditions decide which path to follow next.
4. The flow ends when it reaches a terminal node or there are no more connections.

Useful tools and options in Flow Builder

Draft view

The draft view of the editor or canvas appears after you have created a flow and selected Build. This view contains the different tools you will need to create or edit a flow.

- **Undo, redo and center flow tools:** At the top of draft view, these tools allow you to go backwards after you have made a change, or go one step forward according to your needs. The "Center flow" button will automatically center the diagram.
- **Zoom and screen tools:** These tools adjust the zoom, adapt the diagram to the size of the window, and activate or deactivate the minimap.
- **Side menu:** Use this menu located on the right side of the draft view canvas to add services, tools, channels and obtain information on how to set session variables. Hover over each icon in the side menu for tool tips on each tool in the side menu. The tools, services, and channels for your flow are located in this menu.
- **Preview services:** After selecting Build during the Create a flow process, the side menu located on the right side will display the services available to you. By selecting the icon located on the right side of each service name, you can view the details of each service. There you can access the "General" tab, which contains basic information about the service. You can also view details of the saved responses and flows in which this service is used in the Responses and Flows tabs.

The draft view is similar to a diagram drawing tool. Once nodes (services and tools) are added, you can select the the diamonds to connect each node together just as you would if you are creating a diagram in diagram drawing tool. You can also use the delete key on your keyboard to delete an unwanted node.

Reports

The platform also houses a collection of report options, including near-live traffic reports, executive reports, and transaction monitoring. These reports allow you to monitor your transactions. Use this data to help you adjust and plan your flows. Note that some reports will derive their data labels from the names that you assign to items in your flows.

Account management and administrative settings

For more information about the account management or administrative settings for the Protect Platform or Flow Builder, contact our Customer Support Team or consult our Support Center documentation for assistance. The Flow Builder also contains in-app tool tips and contextual help as well.

Updated about 1 month ago

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Flow Builder - Create a flow →