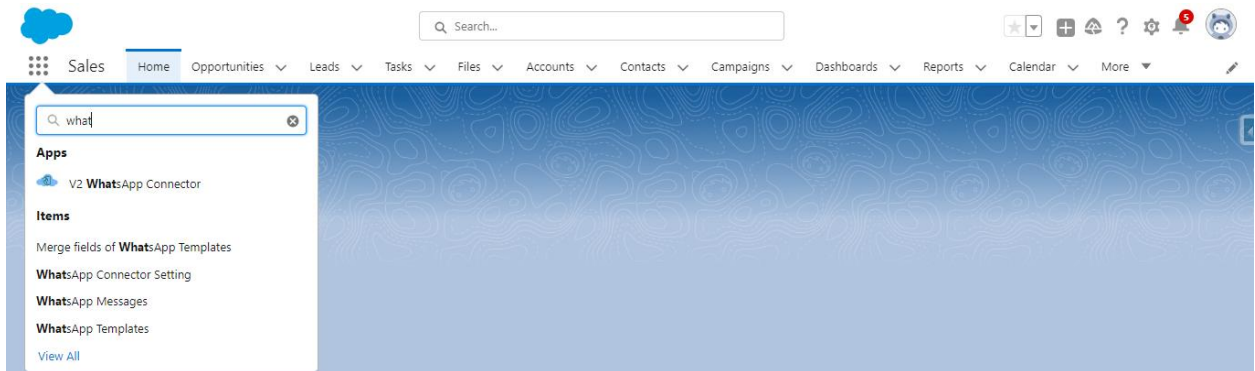


WhatsApp Integration

User Guide

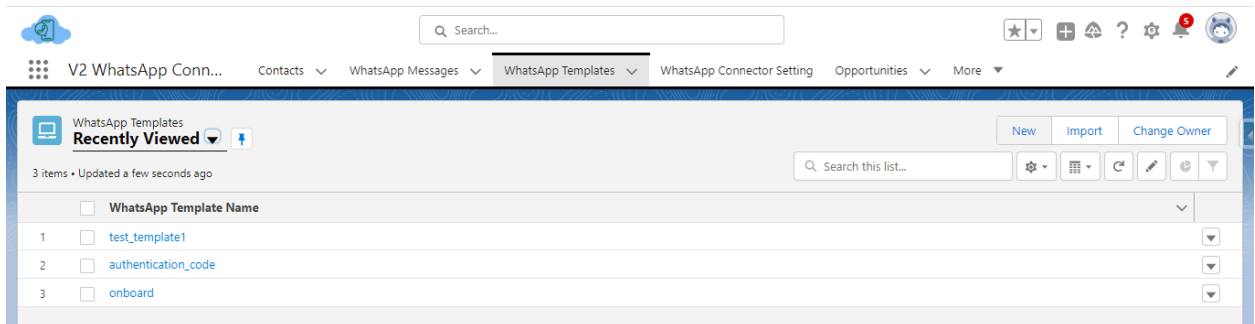
Steps to open app: -

- Go to app launcher.
- Select 'V2 WhatsApp Connector' app.



Steps to create WhatsApp template: -

- Go to WhatsApp template tab and click on 'new' button.



- You will be redirected to a template creation form.
- Select the object for which you want to create the template from the 'Choose Object' dropdown.

New message Template

* Choose Object

Select Object

Account

Contact

Lead

Opportunity

Name

* Name your message template.

Enter message template name...

Characters: 0/512

Languages

Choose language for your message template.

English (US)

- If the object for which you want to create the template is unavailable in the dropdown, contact your system admin to enable the object from WhatsApp connector settings.
- Select the category for your template.
- Enter the name, language, header, body, and footer of the template.
- Users can add merge fields in header and body through 'Add Variable' button.

Languages

Choose language for your message template.

English (US)

Manage Template

Header(Optional)

Add a title at the top of your message template

Enter Text...

Characters: 0/60

+ Add Variable

Body

* Enter the text for your message in the language that you've selected.

B I

Characters: 0/1024

+ Add Variable

Footer(Optional)

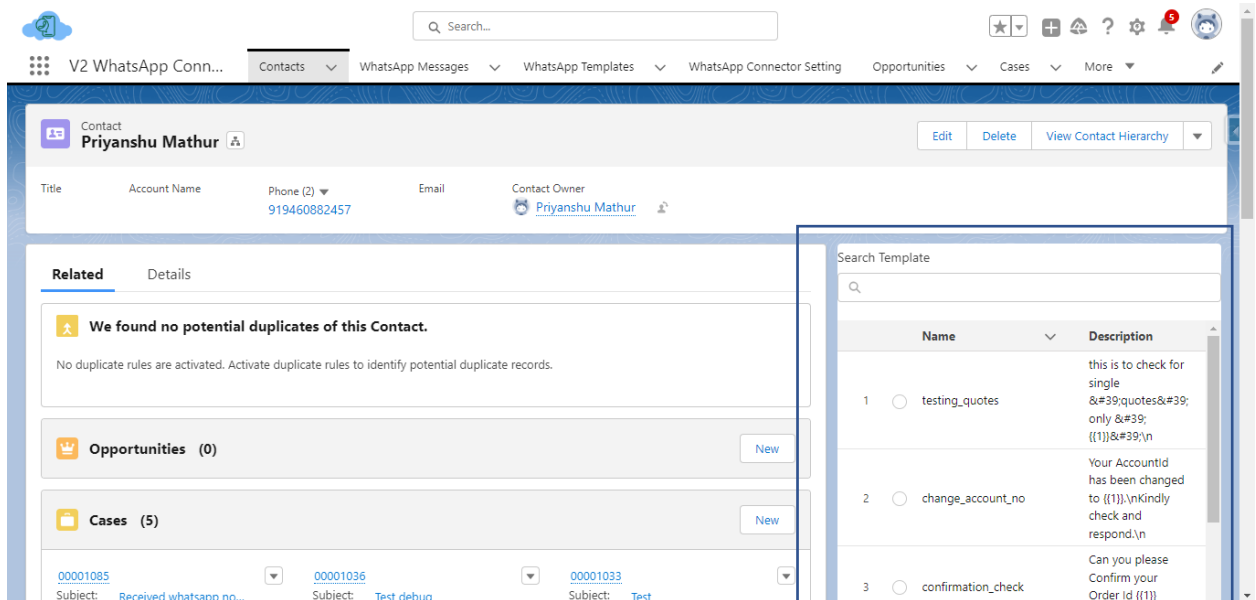
Add a short line of text to the bottom of your message template.

Enter Text...

- Click on 'Submit' button and the template record will get created in WhatsApp Template object.

Steps to send message to single record: -

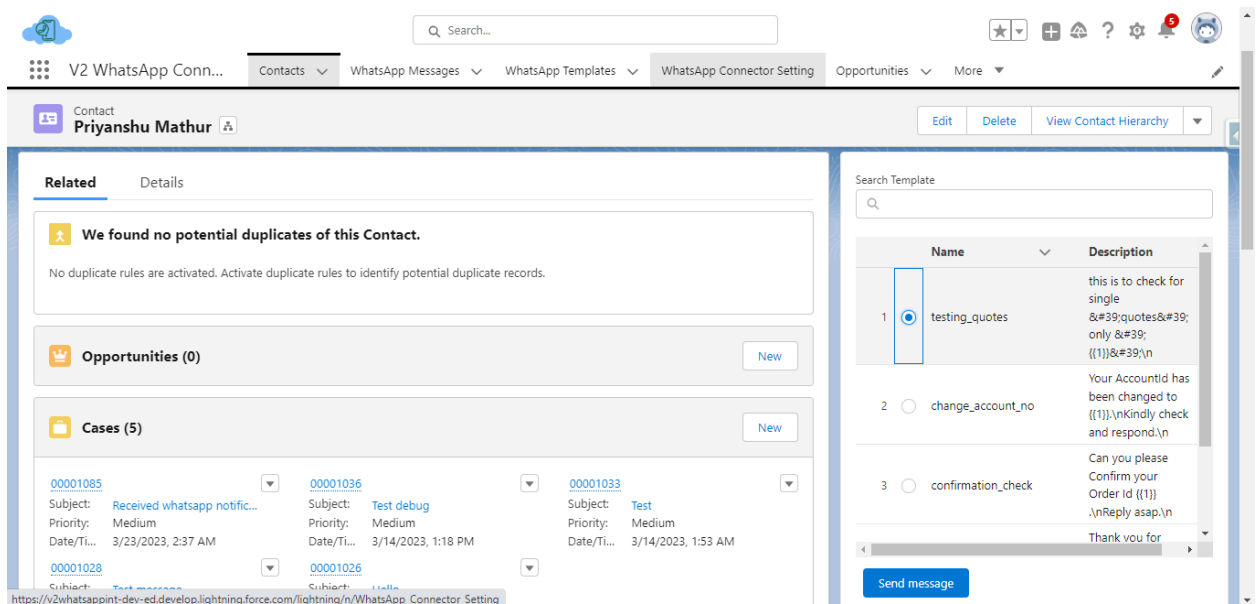
- Go to the desired object, then click on the record to which you want to send the message.
- On the record page, you will see the component on the right side and if it is not available, contact your system admin to enable the object from WhatsApp connector settings and add it to the record page.



The screenshot shows the Salesforce interface for a contact named Priyanshu Mathur. The 'Related' section indicates no potential duplicates. The 'Cases' section shows 5 cases. A 'Search Template' dialog is open on the right, displaying a table of templates.

Name	Description
1 testing_quotes	this is to check for single 'quotes'; only '{{1}}';\n
2 change_account_no	Your AccountId has been changed to {{1}}.\nKindly check and respond.\n
3 confirmation_check	Can you please Confirm your Order Id {{1}}.\nReply asap.\n

- Select a template from the table or if the desired template is not present in the table, you can add it by searching it and then selecting it and after selecting a template, the 'send message' button will be enabled.

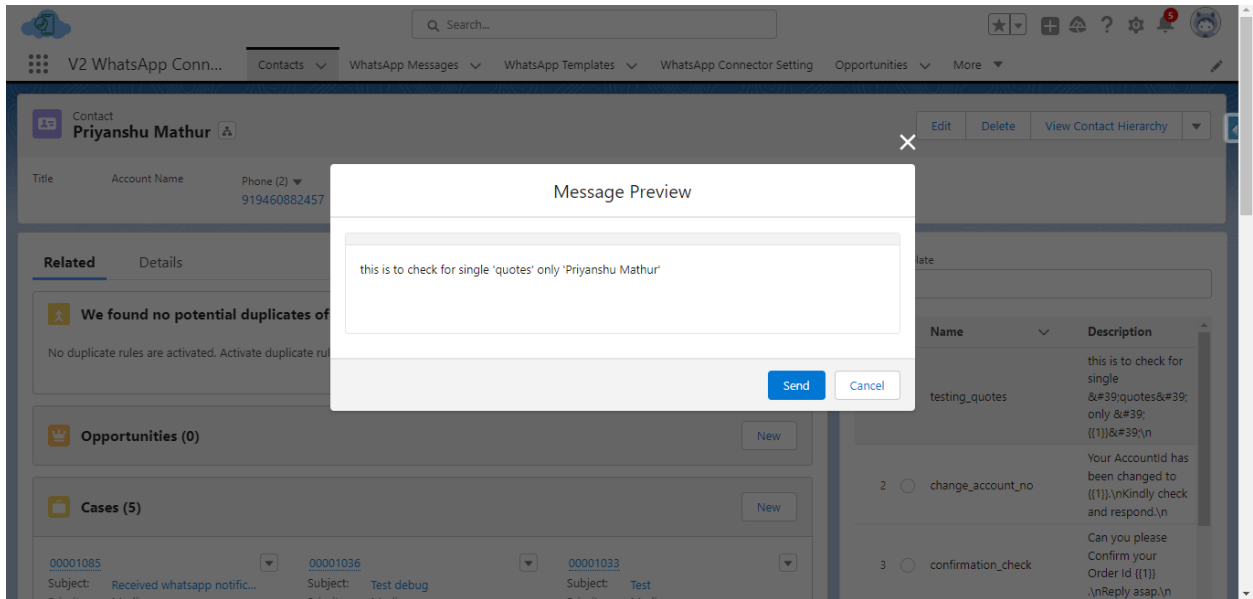


The screenshot shows the Salesforce interface for a contact named Priyanshu Mathur. The 'Related' section indicates no potential duplicates. The 'Cases' section shows 5 cases. The 'Search Template' dialog is open on the right, and the 'Send message' button is now enabled.

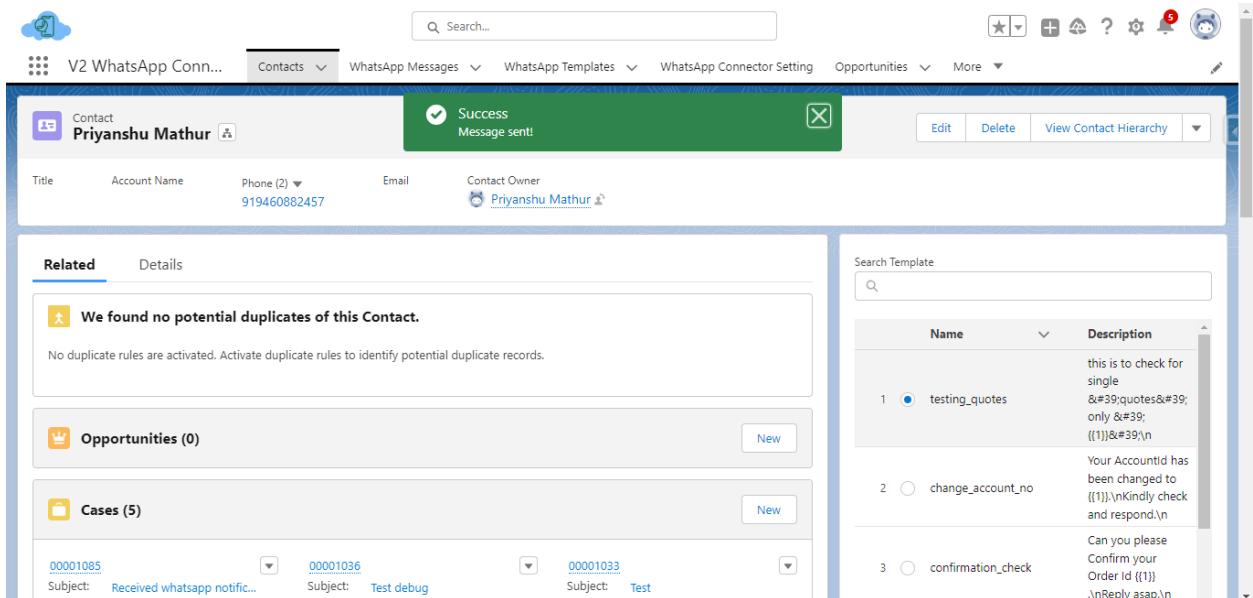
Name	Description
1 testing_quotes	this is to check for single 'quotes'; only '{{1}}';\n
2 change_account_no	Your AccountId has been changed to {{1}}.\nKindly check and respond.\n
3 confirmation_check	Can you please Confirm your Order Id {{1}}.\nReply asap.\n

Send message

- On clicking the 'send message' button, you will get a preview of the message with the details of the record page on which it is present in place of the merge fields.



- Click on the 'Send' button to send the template to that user and a success message will appear.



Steps to send WhatsApp message to multiple records: -

- Go to the desired object, then select the records to which you want to send the message, then click on the 'Send Template' button and if the button is not there, contact the system admin to add it.

Contacts
All Contacts

5 items selected

	Name	Account Name	Title	Phone	Email	Contact ...
1	☐ Andy Young	Dickenson plc	SVP, Operations	(785) 241-6200	a_young@dickenson.com	PChit
2	☐ Arthur Song	United Oil & Gas Corp.	CEO	(212) 842-5500	asong@uog.com	PChit
3	☐ Ashley James	United Oil & Gas, UK	VP, Finance	+44 191 4956203	ajames@uog.com	PChit
4	☒ Astha Saruparia			919461356032		math
5	☐ Avi Green	United Oil & Gas Corp.	CFO	(212) 842-5500	agreen@uog.com	PChit
6	☐ Babara Levy	Express Logistics and Transport	SVP, Operations	(503) 421-7800	b.levy@expressl&t.net	PChit
7	☐ Edna Frank	GenePoint	VP, Technology	(650) 867-3450	efrank@genepoint.com	PChit
8	☒ Ganesh Kumbhar					gkumb
9	☒ Harsh Maheshwari			919782411053		math
10	☐ Jack Rogers	Burlington Textiles Corp of America	VP, Facilities	(336) 222-7000	jrogers@burlington.com	PChit
11	☐ Jake Llorac	sForce				PChit
12	☐ Jane Grey	University of Arizona	Dean of Administration	(520) 773-9050	jane_gray@uoa.edu	PChit
13	☐ John Bond	Grand Hotels & Resorts Ltd	VP, Facilities	(312) 596-1000	bond_john@grandhotels.com	PChit

- The selected records will appear in the header in pills form.

Select Template

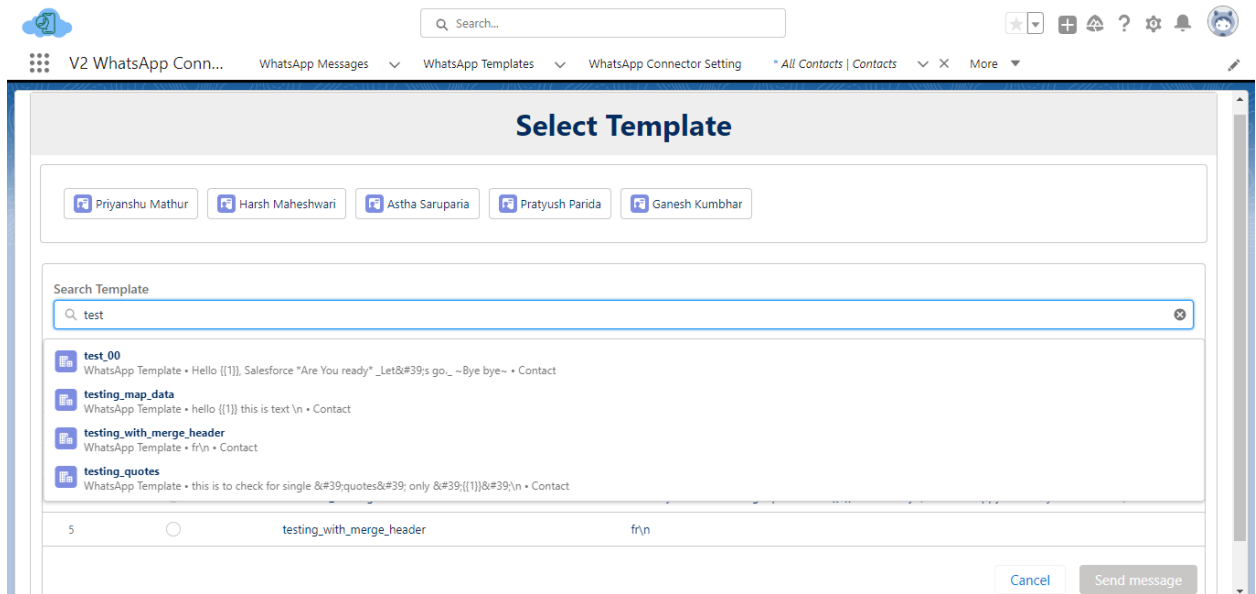
Priyanshu Mathur Harsh Maheshwari Astha Saruparia Pratyush Parida Ganesh Kumbhar

Search Template

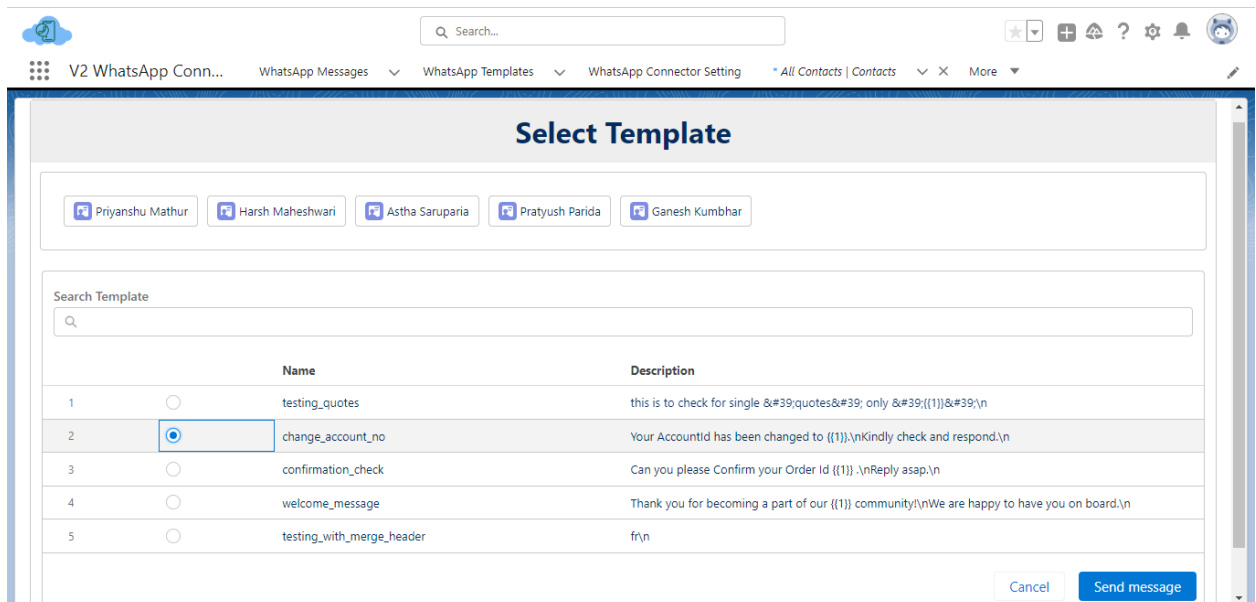
	Name	Description
1	testing_quotes	this is to check for single 'quotes' only '({1})'\n
2	change_account_no	Your AccountId has been changed to ({1}).\nKindly check and respond.\n
3	confirmation_check	Can you please Confirm your Order Id ({1}).\nReply asap.\n
4	welcome_message	Thank you for becoming a part of our ({1}) community!\nWe are happy to have you on board.\n
5	testing_with_merge_header	fr\n

Cancel Send message

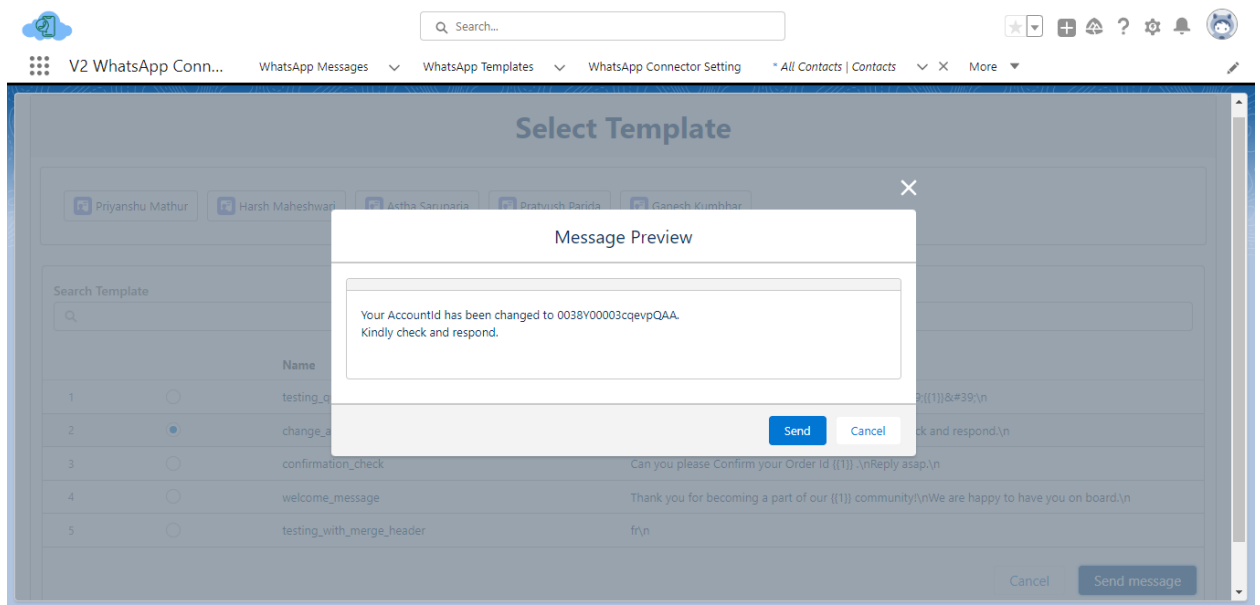
- Search for the required template in the search bar or select a template from the table below.



- If the template is already present in the table it will show a warning otherwise it will get added, then select the required template.



- Click on “Send Message” button, which will open a message preview dialogue box.
- On clicking the ‘send message’ button, you will get a preview of the message for the first selected record with the details of the record page on which it is present in place of the merge fields.



- Click on the 'Send' button to send the template to that user and a success message will appear and will be redirected back to the list view.

