



**INNO
VALLEY
WORKS**

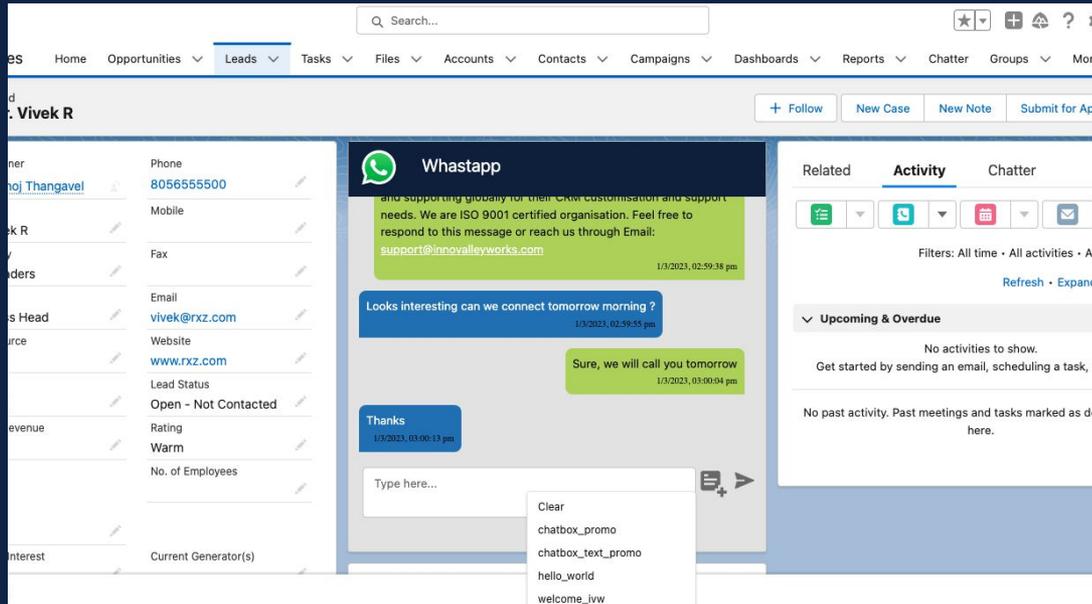


**Whatsapp Business
From Salesforce**



One on One Messages

- A plug and play component, placed on a Lead/Contact record page to send/receive WhatsApp message with customer.
- Sales/Marketing agents can send the template messages.



The screenshot displays a CRM interface with a WhatsApp chat window overlaid on a lead record for "Vivek R". The chat window shows a conversation where the user asks "Looks interesting can we connect tomorrow morning?" and the system responds "Sure, we will call you tomorrow". The user then says "Thanks". The chat window also includes a search bar, a "Type here..." input field, and a dropdown menu with options like "Clear", "chatbox_promo", "chatbox_text_promo", "hello_world", and "welcome_lvw". The background CRM interface shows a navigation menu with options like "Home", "Opportunities", "Leads", "Tasks", "Files", "Accounts", "Contacts", "Campaigns", "Dashboards", "Reports", "Chatter", "Groups", and "More". The lead record for "Vivek R" includes fields for "Phone" (8056555500), "Mobile", "Fax", "Email" (vivek@rxz.com), "Website" (www.rxz.com), "Lead Status" (Open - Not Contacted), "Rating" (Warm), "No. of Employees", and "Current Generator(s)".

- Agents can have conversation with customers in Lead/Contact when customer initiates the chat.
- View all the past conversation of the customer in WhatsApp View

The screenshot displays a CRM interface for a lead named Mr. Vivek R. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', and 'More'. The lead's profile shows contact information: Title (Business Head), Company (RXZ Traders), Phone (8056555500), and Email (vivek@rxz.com). Below the profile, there are tabs for 'Open - Not Contacted', 'Working - Contacted', 'Closed - Not Converted', and 'Converted', with a 'Mark Status as Complete' button. The main content area is divided into three sections: a lead information table, a WhatsApp chat window, and an activity log.

Field	Value
Lead Owner	Manoj Thangavel
Name	Mr. Vivek R
Company	RXZ Traders
Title	Business Head
Lead Source	Web
Industry	Apparel
Annual Revenue	
Address	
Product Interest	
SIC Code	
Phone	8056555500
Mobile	
Fax	
Email	vivek@rxz.com
Website	www.rxz.com
Lead Status	Open - Not Contacted
Rating	Warm
No. of Employees	
Current Generator(s)	
Primary	

WhatsApp Chat:

- Lead: and supporting globally for their CRM customisation and support needs. We are ISO 9001 certified organisation. Feel free to respond to this message or reach us through Email: support@innovalleyworks.com (1/3/2023, 02:59:18 pm)
- Agent: Looks interesting can we connect tomorrow morning? (1/3/2023, 02:59:55 pm)
- Lead: Sure, we will call you tomorrow (1/3/2023, 03:00:04 pm)
- Agent: Thanks (1/3/2023, 03:00:13 pm)

Activity Log:

- Filters: All time • All activities • All types
- Refresh • Expand All • View All
- Upcoming & Overdue: No activities to show. Get started by sending an email, scheduling a task, and more.
- No past activity. Past meetings and tasks marked as done show up here.

WhatsApp Campaign

- Send bulk messages to leads / contacts.
- Build campaign and prepare the template message with images/texts and send to all campaign members.
- Send Dynamic Template messages with Salesforce field values

The screenshot displays the Salesforce Campaign Manager interface. The main campaign is titled "DM Campaign to Top Customers - Jan 12-23, 2023". The campaign status is "In Progress", starting on 12/01/2023 and ending on 26/01/2023. The campaign owner is Manoj Thangavel. The campaign name is "DM Campaign to Top Customers - Jan 12-23, 2023". The campaign is active, with 4 leads in the campaign. The start date is 12/01/2023. The expected revenue in the campaign is ₹25,00,000, and the budgeted cost is ₹25,000. The actual cost is ₹23,500. The expected response rate is 7.00%.

A confirmation dialog box is overlaid on the interface, titled "Send Campaign". The dialog contains the following text:

The `chatbox_promo` template message will be sent to 8 Campaign Members.

Chatbox is a native salesforce chat application, that connects people in the Salesforce org, helps them to collaborate in private chat or group chat. Get this Free with below link <https://appexchange.salesforce.com/listingDetail?listingId=a0N4V00000GuEMvUAN&tab=e>

The dialog has two buttons: "Cancel" and "Send Message".

In the background, the "Campaign Members" section is visible, showing a donut chart with the number 8 in the center, indicating the number of members in the campaign.

WhatsApp Campaign - Status



Dashboard

WA Messages - Status

As of 28-Apr-2023, 11:04 am-Viewing as Dhilban Thangavel

Refresh

Edit

Subscribe



Total Campaign Messages Sent Today

4

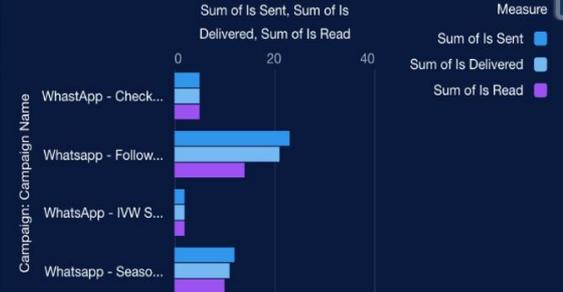
View Report (Total Campaign Messages Sent Today)

Today's One to One Messages



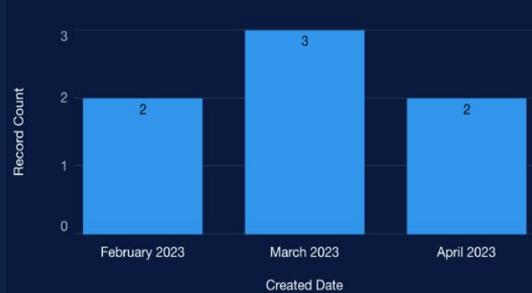
View Report (Today's One to One Messages)

Message Status Based on Campaign



View Report (Message Status Based on Campaign)

Total Whatsapp Campaigns Monthwise



WA Campaign Messages Sent - Monthly



Campaign Message Status based on Month



Notify the New Inbound Messages

- Notify the lead/contact owners for the new messages received on Whatsapp.
- So no inbound missing.
- Also New leads created if Phone number not available in the Org.

The screenshot displays the Salesforce CRM interface for a lead named Mr. Vivek R. The lead's contact information includes the title Business Head, company RXZ Traders, phone number 8056555500, and email vivek@rxz.com. The lead is currently in the 'Open - Not Contacted' status. A WhatsApp chat window is open, showing a message from Inno Valley Works: 'We are Salesforce Silver partner with Salesforce certified experts and supporting globally for their CRM customisation and support needs. We are ISO 9001 certified organisation. Feel free to respond to this message or reach us through Email: support@innovalleyworks.com'. A response from the lead is visible: 'Looks interesting can we connect tomorrow morning?'. Another response from Inno Valley Works is visible: 'Sure, we will call you tomorrow'. A notifications panel on the right side of the screen shows three notifications: 'Check the new Message! on Vivek R New Message Received' (a day ago), 'New Guidance Center learning resource available Define Your Sales Process Learn how to guide reps through the sales process. 27-Feb-2023, 12:18 pm', and 'New Guidance Center learning resource available Manage Your Sales Data Optimize your Salesforce data to fit the unique needs of your user.'



WhatsApp for Service Cloud

- The app configured to Case for service agents to interact with customers.
- New case will be create if customer starts conversations within 24 hrs.

The screenshot displays the Service Cloud user interface. At the top, a navigation bar includes 'Service', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Cases', 'Reports', 'Dashboards', 'WA Chat Messages', and 'WA Templates'. The main content area is divided into three columns:

- Left Column:**
 - Case Details:** Case Number 00001061, Case Owner dev whatsapp, Status New, Priority Medium, Subject Having an issue with Product installed, Description Please find the screen shot and fix it.
 - Contact Details:** Name Manoj, Title Account Name IVW, Email Phone 9566582294.
 - Cases for Parent Contact (1):** 00001061, Subject Having an issue with Product in..., Priority Medium, Date/Time 22/03/2023, 12:22 pm.
- Center Column:**
 - Case Header:** Case Having an issue with Product installed, with '+ Follow' and 'Edit' buttons.
 - WhatsApp Chat:** A chat window with a WhatsApp logo header. Messages include: 'Hello IVW' (22/3/2023, 12:22:50 pm), 'I have an issue with a product' (22/3/2023, 12:22:55 pm), 'Please keep me posted with a screenshot' (22/3/2023, 12:23:15 pm), and 'Thanks, let me find that' (22/3/2023, 12:23:23 pm). A text input field at the bottom says 'Type here...'.
- Right Column:**
 - Milestones:** No milestones to show.
 - Related:** Attachments (0), Activity History (0), and Open Activities (0).

Scan the QR Code For Chat

Sales/ Lead / contact

+91 7975836644



Service/ Case

+91 9790247712



Inno Valley Works Support

1. Setup of Meta developer app for whatsapp
2. The package installation in sandbox & Demo
3. The package installation in production

Prerequisite

1. Access to your Meta Facebook page or Meta Developer App access
 - a. Create App here - <https://developers.facebook.com/apps>
2. Production phone number registered for WhatsApp Business
3. Salesforce Sandbox access

WhatsApp Messages Pricing Details:

<https://developers.facebook.com/docs/whatsapp/pricing/>

Salesforce App Pricing

Features	Standard		Advanced
	Sales	Service	Sales/Service/Marketing
One to One Messaging Lead/Contact	✓	X	✓
One to One Messaging from Case	X	✓	✓
Notification on New Messages	✓	✓	✓
New Lead/Case creation on New numbers	✓	✓	✓
Bulk Whatsapp message for Campaigns	X	X	✓

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