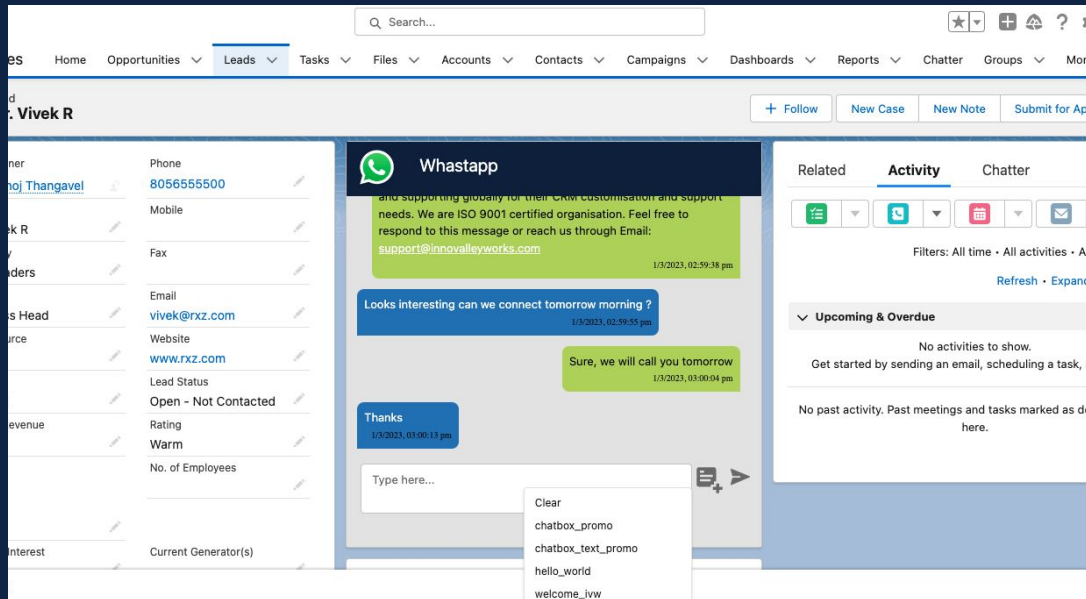




Whatsapp Business
From Salesforce

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.



- 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 the Inno Valley Works CRM interface. At the top, a navigation bar includes links for Sales, Home, Opportunities, Leads (selected), Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and More. Below the navigation bar, the lead profile for **Mr. Vivek R** is shown, including fields for Title (Business Head), Company (RXZ Traders), Phone (8056555500), and Email (vivek@rxz.com). A status bar below the profile indicates the lead's current status: **Open - Not Contacted**. To the left of the chat window, a sidebar lists lead details such as Lead Owner (Manoj Thangavel), Name (Mr. Vivek R), Company (RXZ Traders), Title (Business Head), Lead Source (Web), Industry (Apparel), Annual Revenue, Address, Product Interest, and SIC Code. The central chat window, titled **Whatsapp**, shows a conversation with the lead. The lead's message reads: "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". The agent's response is: "Looks interesting can we connect tomorrow morning?". The lead's reply is: "Thanks". The chat window also includes a text input field and a "Type here..." placeholder. To the right of the chat window, a sidebar shows related activity, including a section for **Upcoming & Overdue** activities, which currently shows no activities to display.

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. At the top, a navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and More. The main content area shows a campaign titled "DM Campaign to Top Customers - Jan 12-23, 2023". Below the title, there are buttons for "Whatsapp Messages", "New Contact", and "New Opportunity". A table provides details about the campaign: Type (Direct Mail), Status (In Progress), Start Date (12/01/2023), and End Date (26/01/2023). A modal window titled "Send Campaign" is open, showing a confirmation message: "The chatbox_promo template message will be sent to 8 Campaign Members." Below this, a description of Chatbox is provided, along with a link to the app. The modal has "Cancel" and "Send Message" buttons. In the background, the "Campaign Members" section is visible, showing a donut chart with the number 8 and a "View All" link.

| Type | Status | Start Date | End Date |
|-------------|-------------|------------|------------|
| Direct Mail | In Progress | 12/01/2023 | 26/01/2023 |

Related Details

- Campaign Owner: Manoj Thangavel
- Campaign Name: DM Campaign to Top Customers - Jan 12-23, 2023
- Active: ☒
- Leads in Campaign: 4
- Start Date: 12/01/2023
- Expected Revenue in Campaign: ₹25,00,000
- Budgeted Cost in Campaign: ₹25,000
- Actual Cost in Campaign: ₹23,500
- Expected Response (%): 7.00%

Campaign Members

Number of Members: 8

[View All](#)

WhatsApp Campaign - Status



Dashboard

WA Messages - Status

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

Refresh

Edit

Subscribe



Total Campaign Messages Sent Today

4

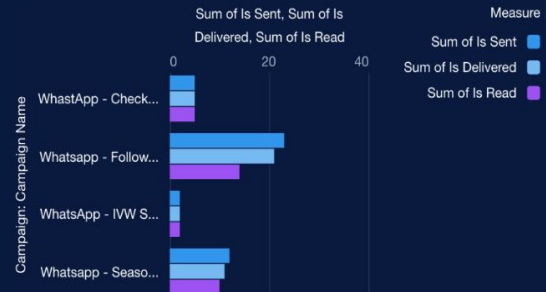
View Report (Total Campaign Messages Sent Today)

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. The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, and Campaigns. The 'Leads' tab is active, showing a lead record for 'Mr. Vivek R'. The lead's details include Title (Business Head), Company (RXZ Traders), Phone (8056555500), and Email (vivek@rxz.com). Below the lead details, there are three tabs: 'Open - Not Contacted' (selected), 'Working - Contacted', and 'Closed - Not Converted'. To the right of the lead details, there is a 'Whatsapp' chat window. The chat window shows a message from 'Manoj Thangavel' (Inno Valley Works) dated 1/3/2023, 02:59:38 pm. The message content is: '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'. Below this message, there is a blue button that says 'Looks interesting can we connect tomorrow morning ?' dated 1/3/2023, 02:59:55 pm. At the bottom of the chat window, there is a green bubble that says 'Sure, we will call you tomorrow' dated 1/3/2023, 03:00:04 pm. On the far left, the Inno Valley Works logo is visible. On the far right, there is a 'Notifications' panel showing three notifications: 'Check the new Message! on Vivek R' (New Message Received, a day ago), 'Check the new Message! on Vivek R' (New Message Received, a day ago), and 'New Guidance Center learning resource available' (Define Your Sales Process, 27-Feb-2023, 12:18 pm).

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 Inno Valley Works Service Cloud interface. The top navigation bar includes links for Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, WA Chat Messages, and WA Templates. The main content area is divided into three sections:

- Case Details:** Displays case information for Case Number 00001061, Status New, Priority Medium, and Subject "Having an issue with Product installed". The description reads "Please find the screen shot and fix it."
- Contact Details:** Displays contact information for Name Manoj, Title Account Name IVW, and Phone 9566582294.
- WhatsApp Chat:** A chat window titled "Whatsapp" showing a conversation. The chat history includes:
 - Message 1: "Hello IVW" (22/3/2023, 12:22:50 pm)
 - Message 2: "I have an issue with a product" (22/3/2023, 12:22:55 pm)
 - Message 3: "Please keep me posted with a screenshot" (22/3/2023, 12:23:15 pm)
 - Message 4: "Thanks, let me find that" (22/3/2023, 12:23:23 pm)The chat input field at the bottom shows "Type here..." and a send button.

On the right side, there are sections for **Milestones** (No milestones to show), **Related** (Attachments (0), Activity History (0), Open Activities (0)), and a **Cases for Parent Contact (1)** list showing the current case.

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 | ✓ |

Contact Us



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