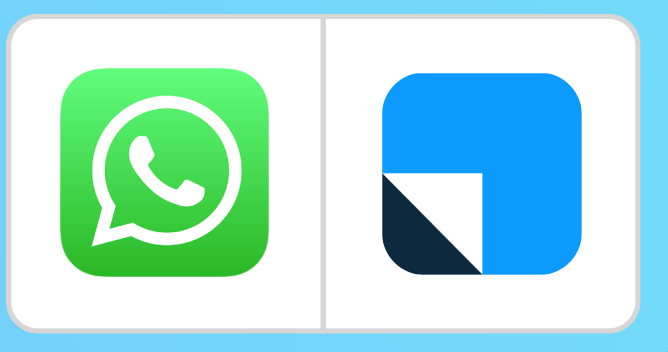


Personally connect with the customers, highlight your services, and seamlessly answer their queries



WhatsApp Messaging

With WhatsApp, you'll get fast, simple, secure messaging and calling for free, available on phones all over the world. WhatsApp is a free to download app that was built with the small business owner in mind. Connect with your customers easily by using tools to automate, sort and quickly respond to messages. WhatsApp can also help medium and large businesses provide customer support and deliver important notifications to customers.

New Age Messaging

Why use WhatsApp?

Keep the Conversation Going : With WhatsApp on the web and desktop, you can seamlessly sync all of your chats to your computer so that you can chat on whatever device is convenient.

Security by Default : When end-to-end encrypted, your messages are secured so only you and your customer can read them.

Document Sharing Made Easy : Send PDFs, documents, photos, videos and more, without the hassle of email or file sharing apps.

Brands can expand their reach, improve message deliverability rate, and also achieve some of their critical business goals. Industries that have seen success with WhatsApp include:



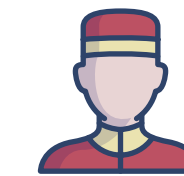
EduTech



E-commerce



Healthcare



Hospitality



3x

Boost in Return
On Investment



45%

Sales lift in some
product areas



32%

Increase in Customer
conversion rates



26%

Decrease in customer
churn rates

Source : WhatsApp, Medium, Webengage & Learning Catalyst

How does WhatsApp Connector work?

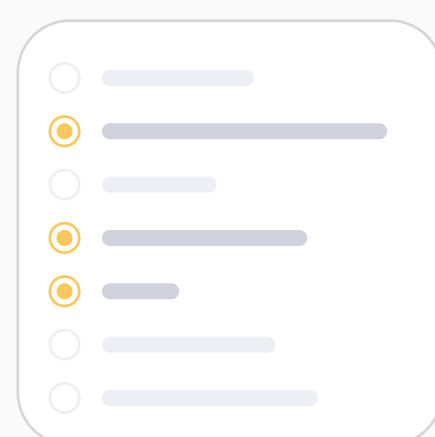
1

WhatsApp connector is **installed** using valid credentials



2

Need to **select recipients** from list for messaging



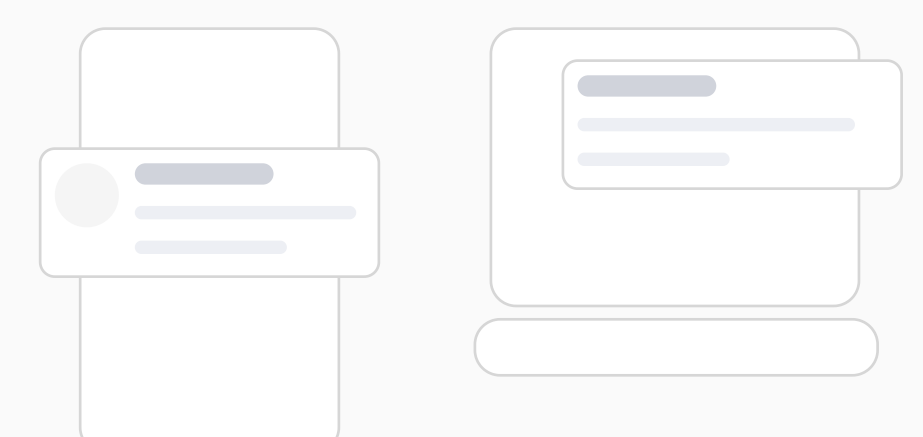
3

WhatsApp template or custom message is set



4

Message is received on **Converse and mobile**



*If activated for the org

LeadSquared's WhatsApp Connector

WhatsApp Business Connector enables businesses to engage with more than 1.5 billion users in 180+ countries. It can be used to deliver timely notifications and automated reminders such as purchase receipts, shipping changes or flight times etc. along with capability to send quick message to leads. Create a unique experience for each customer and further enhance customer engagement by adding WhatsApp as an additional channel as part of their multi-channel communication strategy.

For configuration of WhatsApp Connector, please visit: <https://help.leadSquared.com/whatsapp-business-messaging-connector/>



Streamline and manage WhatsApp communications and manage all your important sales conversations within LeadSquared

An instant messaging application like WhatsApp can help businesses have a more significant impact on customer satisfaction. Brands can expand their reach, improve message deliverability rate, have secure conversations with their customers, increase conversions, and also achieve some of their critical business goals.

What can the integration do?

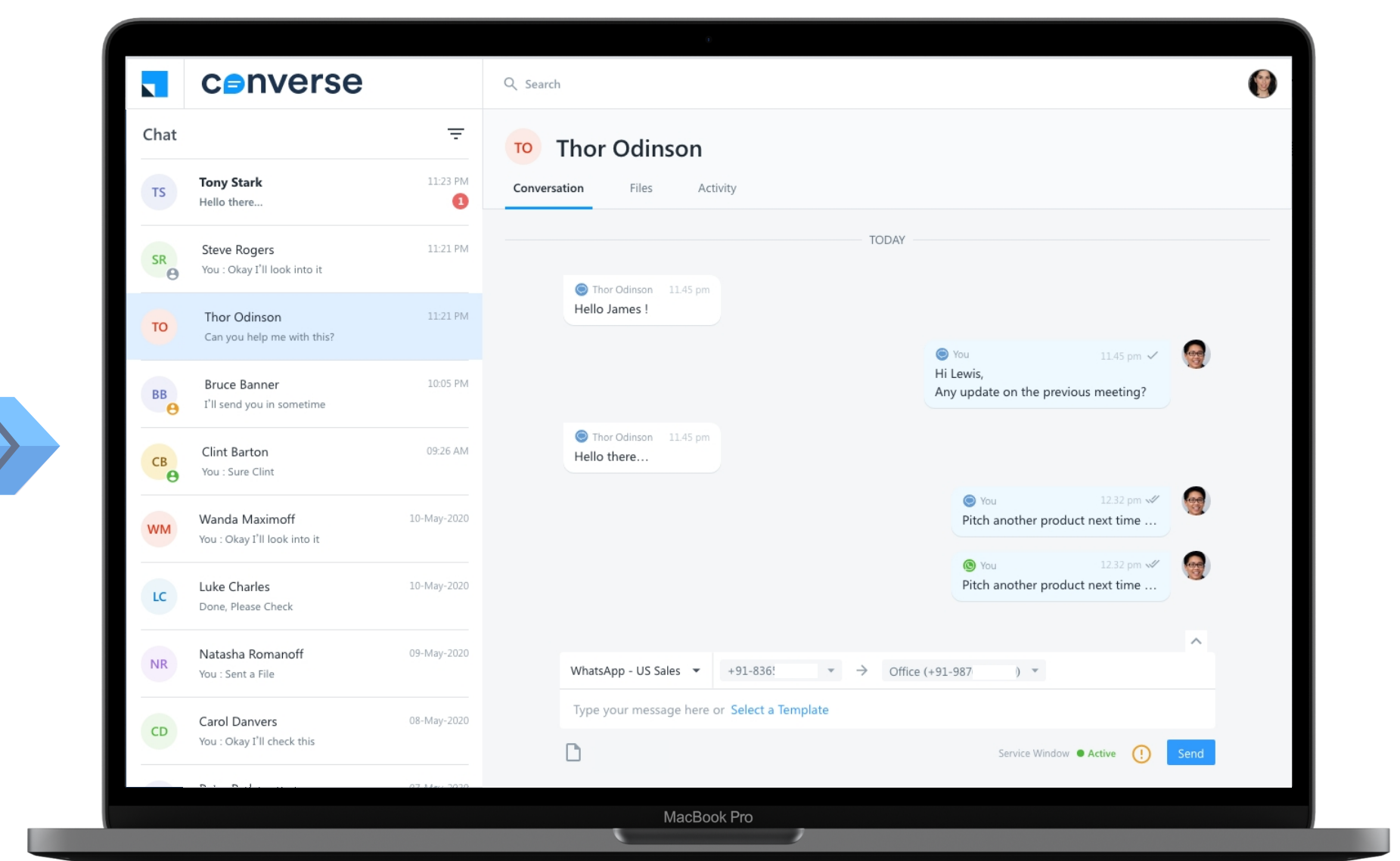
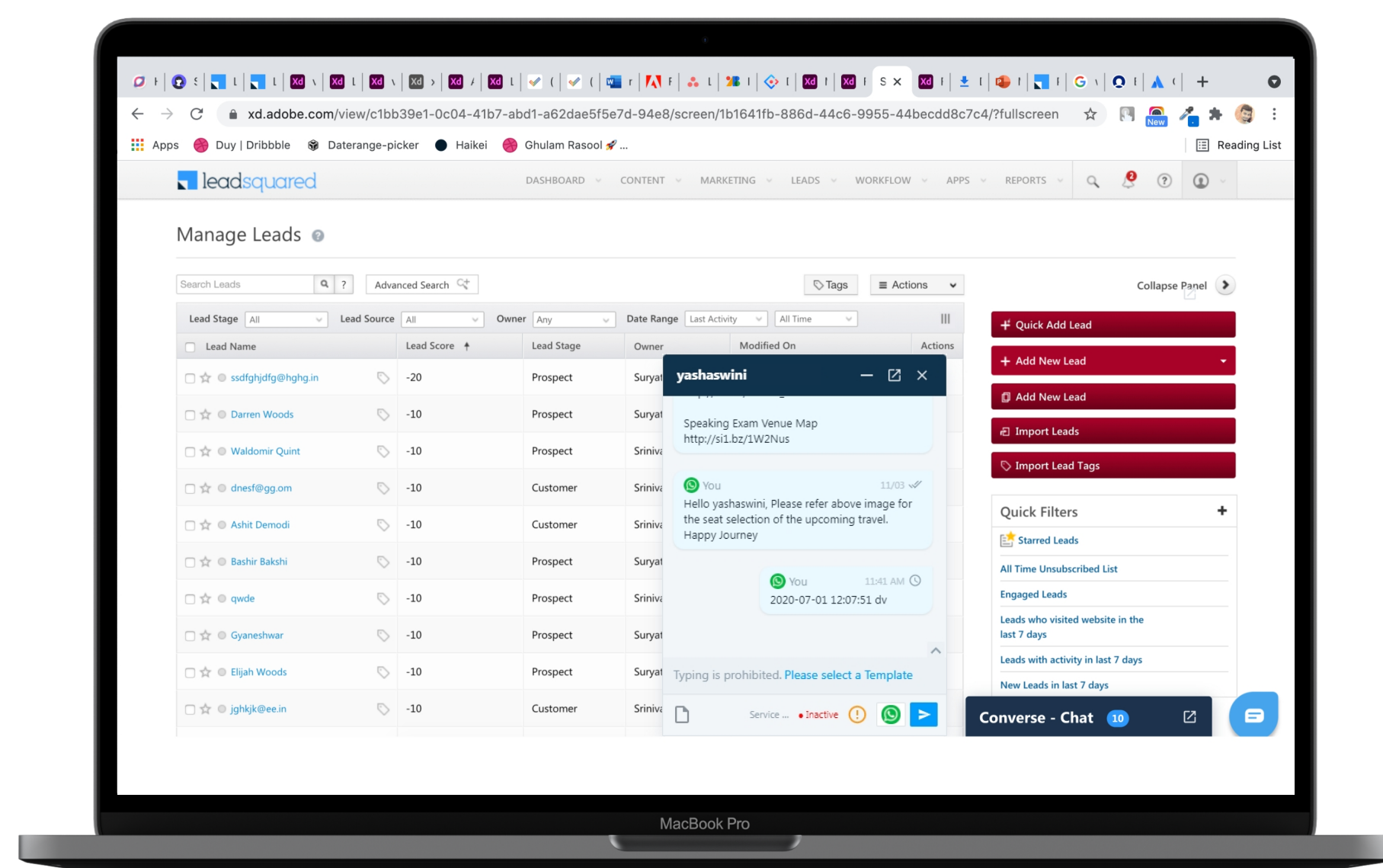
- **Boost conversion drastically:** Convert more leads by sending them a quick message.
- **Automated messaging:** Send Automated Reminders and Timely Notifications on WhatsApp via Automation Workflow.
- **Close your deals effortlessly:** Track Delivery and Read-receipt to re-engage and close opportunities faster.
- **Personalised recommendations:** Send personalised updates and suggestions based on prospect's preference.

What is converse?

Seamless conversation platform

LeadSquared Converse is an instant messaging feature which enables you to have real-time conversations with leads. Your messages will get delivered to your leads as WhatsApp Message. In addition, you'll be able to –

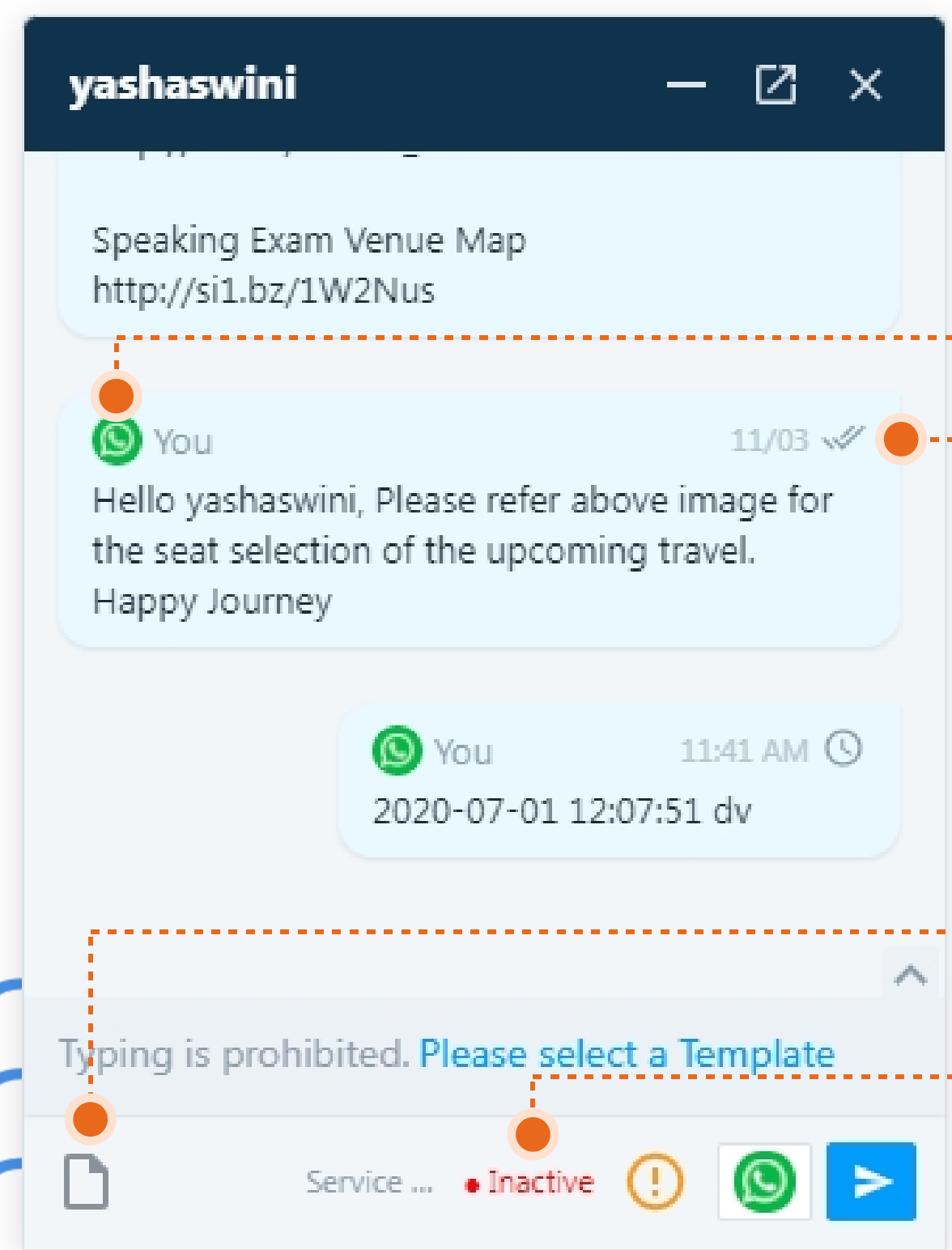
- Send attachments such as images, GIFs, etc., to your leads.
- View all conversations with leads in one place.
- Eliminate the need to switch between multiple applications to communicate with your leads.



Pre-requisites for Converse

- Your account plan must support WhatsApp integration.
- You must have the WhatsApp Business Connector installed and configured in your account.
- To enable LeadSquared Converse in your account, please write to support@leadsquared.com.

WhatsApp Messaging and Converse



Platform : **WhatsApp**

Message **Status**

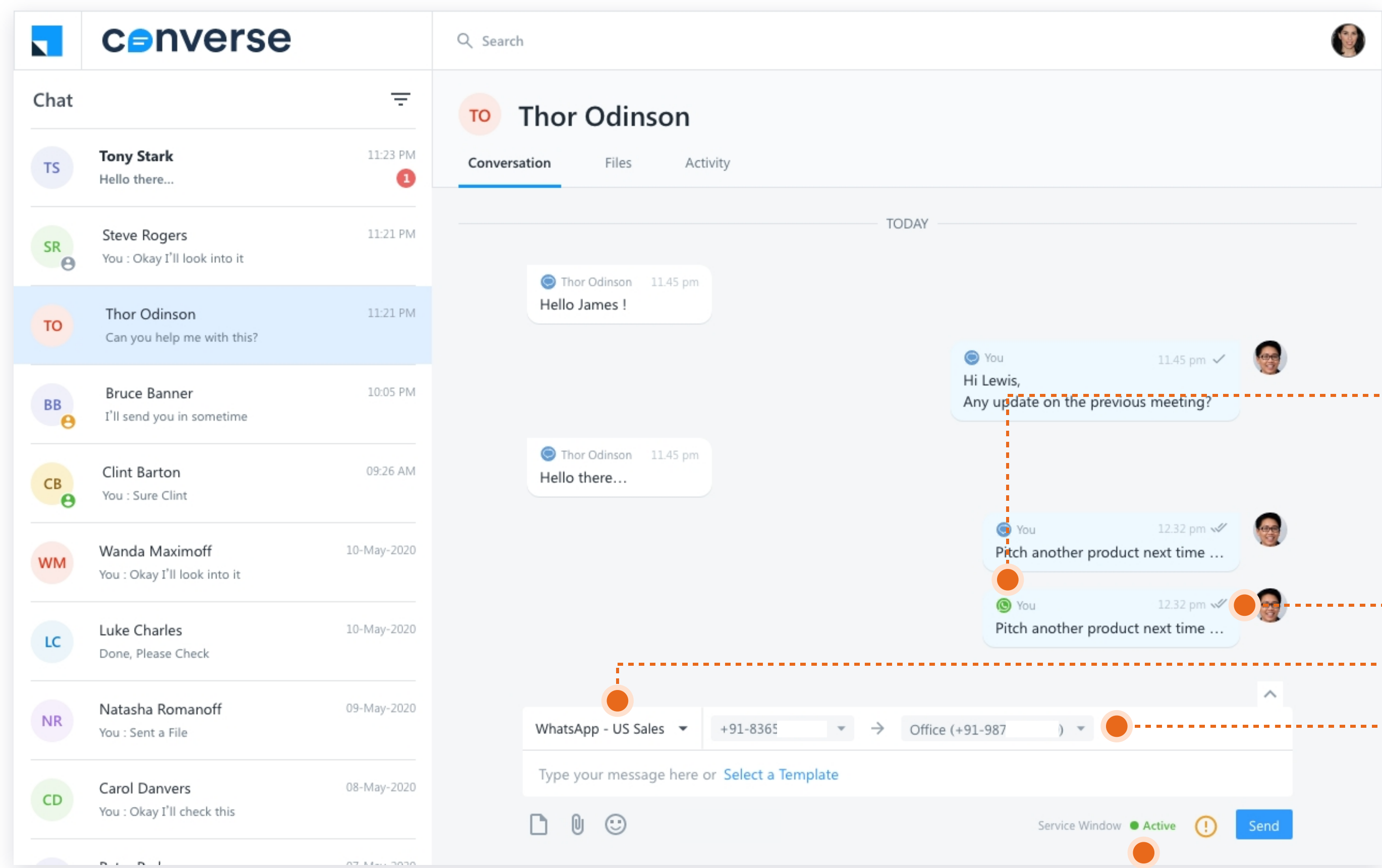
Template Selection

Service Window
Status

• **Service window is active** - You can either select and send both Approved and Non-approved templates from the template list or can type custom message

• **Service window is not active** - You can select and send only Approved templates from the template list

Normal Chat Window



Message sent via : **WhatsApp**

Message **Status**

Selected Platform : **WhatsApp**

From and **To** Numbers

Service Window
Status

Full Screen Chat Window

Converse Settings in Templates

Once your templates have been approved, you can add them to your LeadSquared account which can be sent later during One-one, automation, campaigns or bulk message sending.

- If the users wants any particular template to be available in Converse, they need to select the checkbox
- The template should have only lead or user mail merge fields in content, other templates may not be supported

Add/Modify Template

Select Attachment Type

☒ Static

☐ Dynamic

Image Details

Enter Image URL here

Button Template

☒

Button Type

☐ Static

☒ Dynamic

Variable Mapping

Variable	Object	Field	Default Value
{{1}}	Lead	First Name	User

☒ Available in Converse

Note : The template should have only lead or user mail merge fields in content, other templates may not be supported

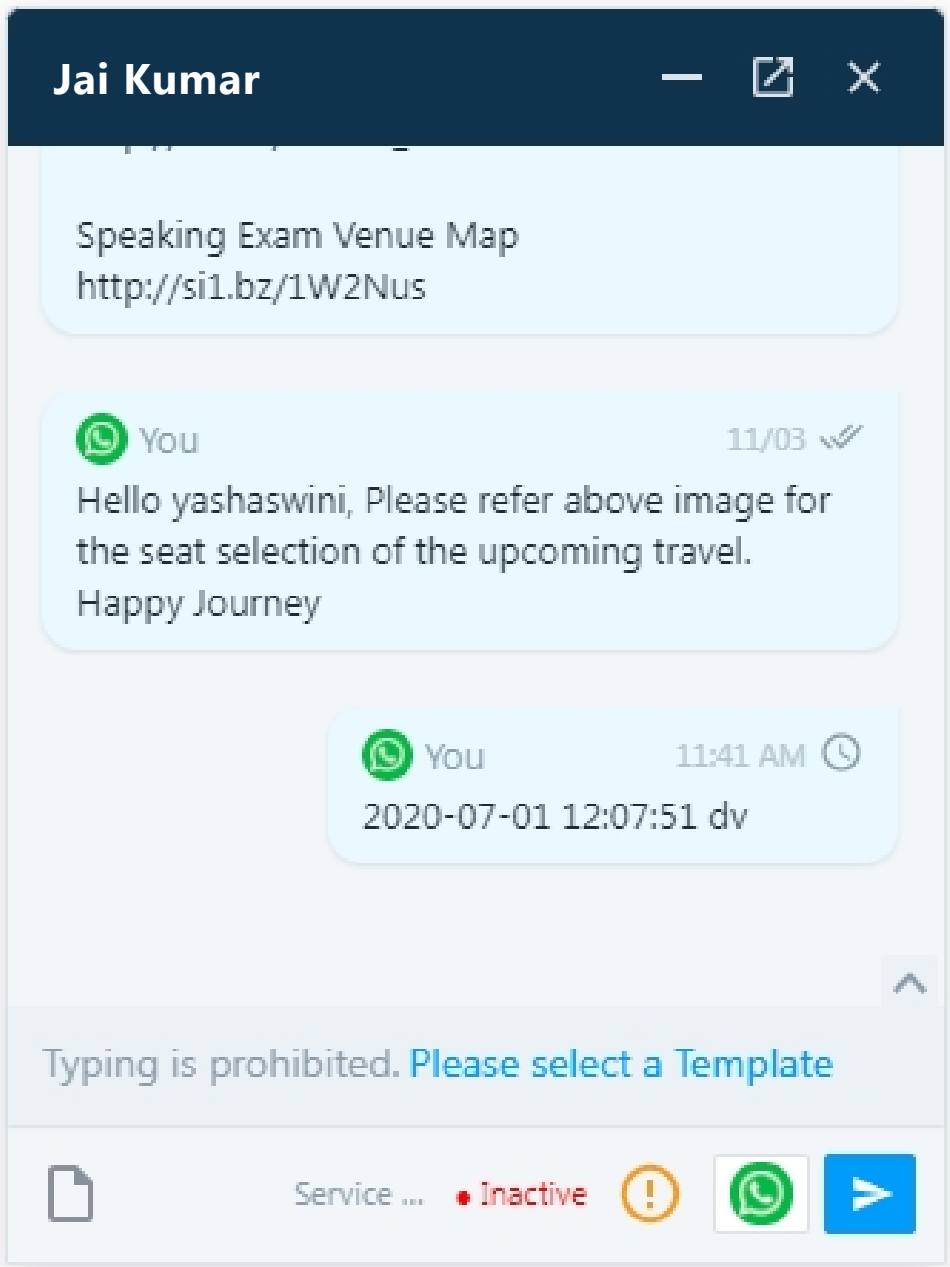
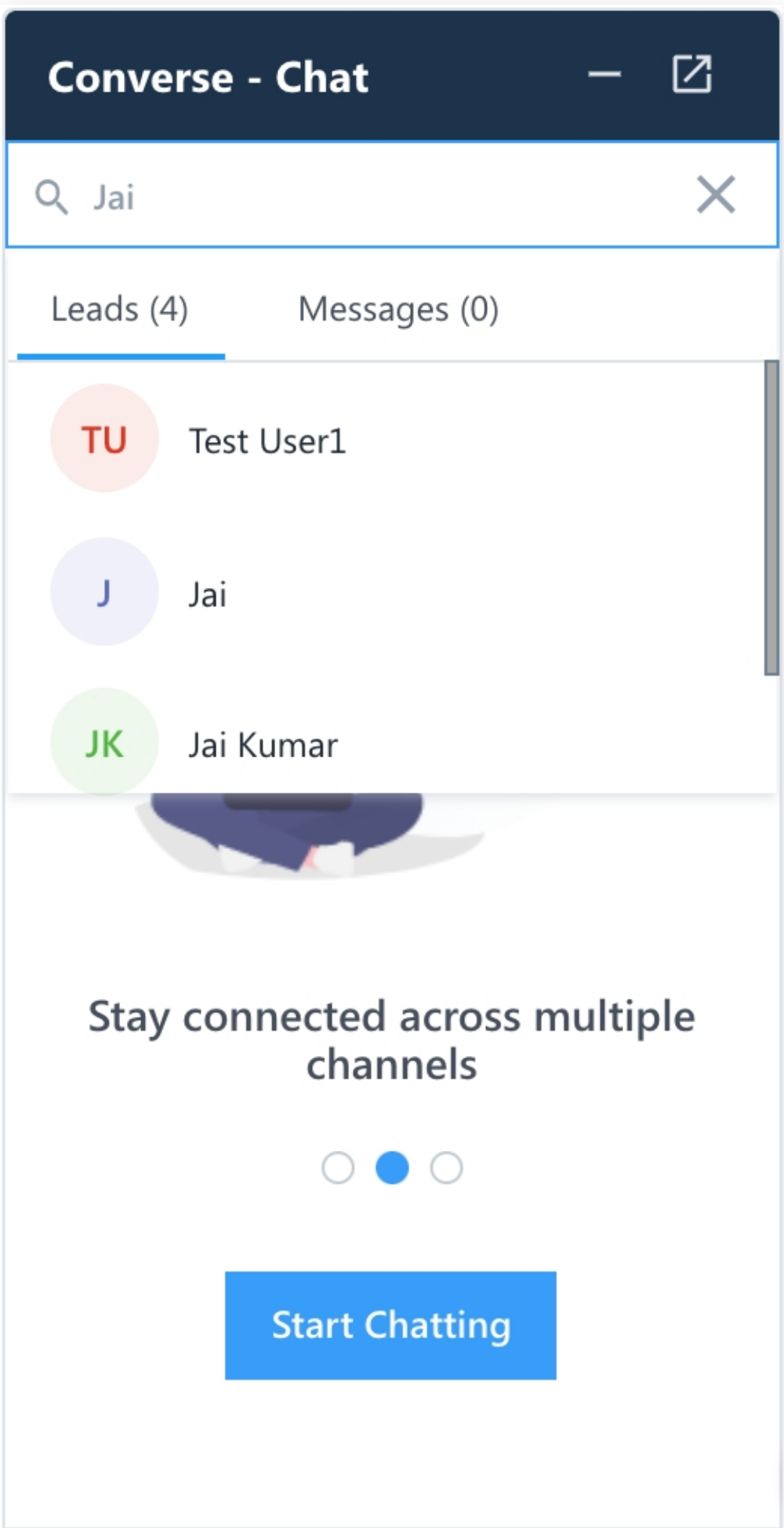
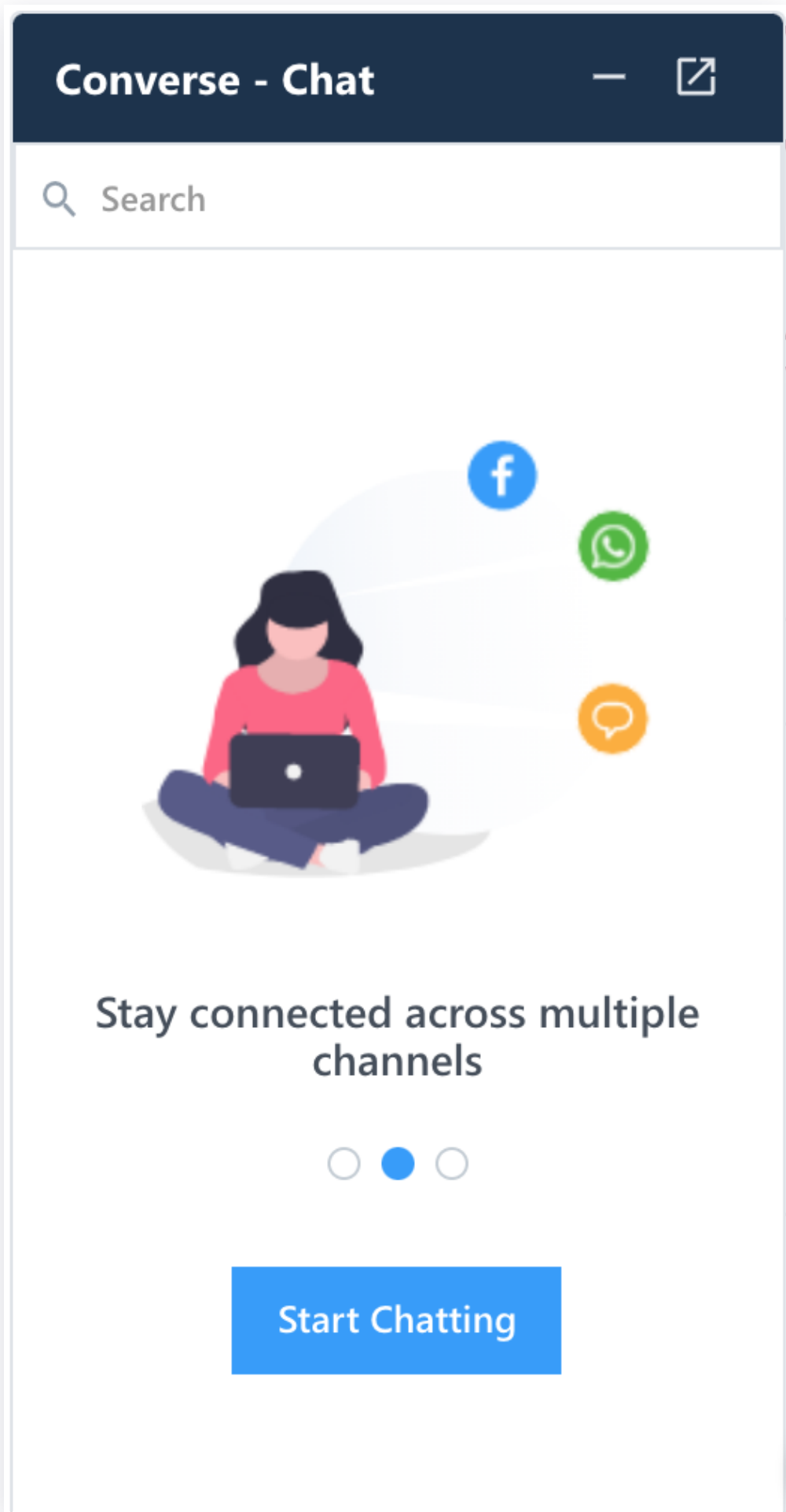
Save

Converse Availability

Conversing with Leads

After LeadSquared Converse is enabled on your account, to speak to your leads –

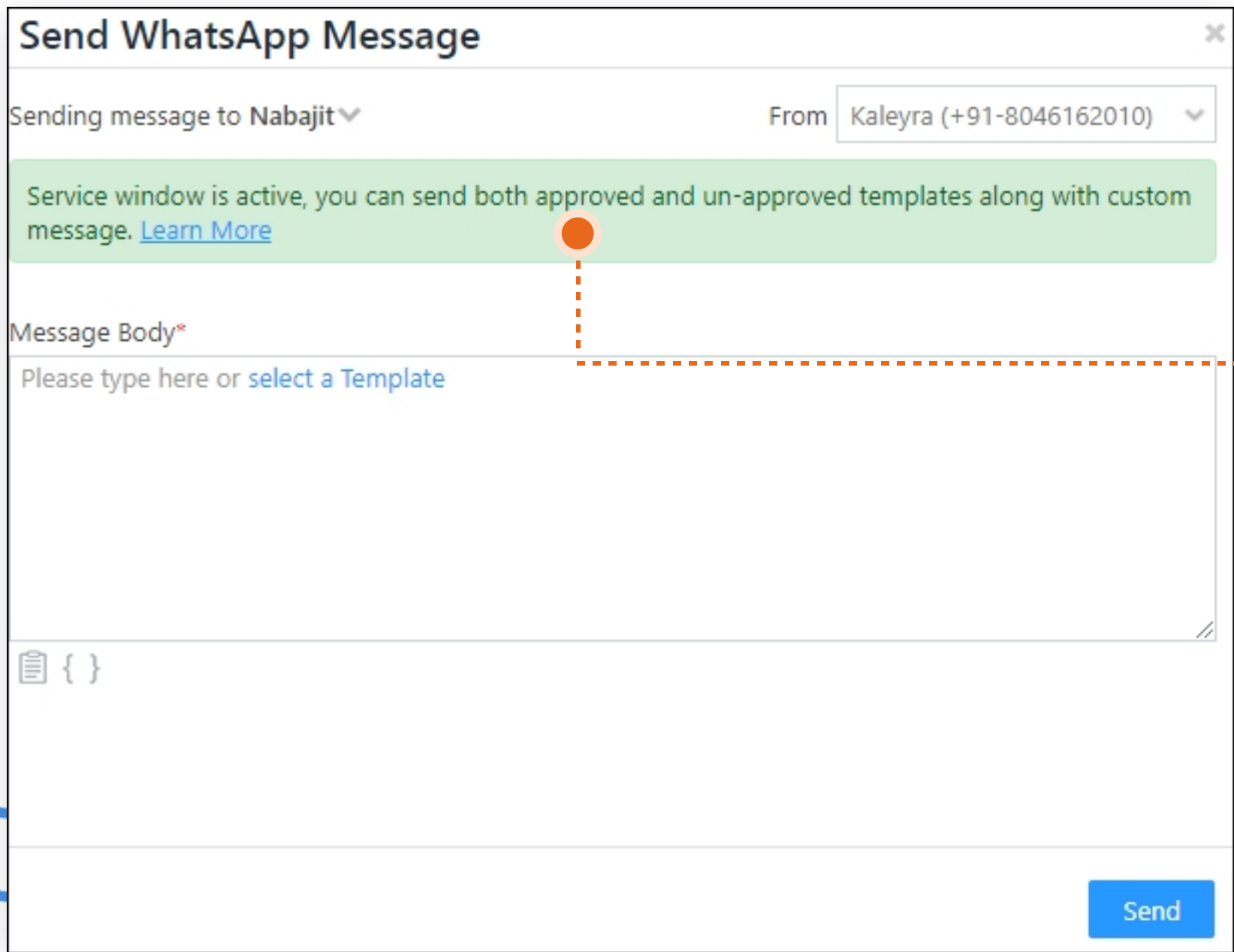
- Log in to your LeadSquared account, and from the main menu, click **Converse – Chat**.
- On the chat pop-up, search for the lead you want to converse with. You'll have to type either the lead's first name or last name, in entirety, for the lead to appear.
- On the chat pop-up, you can begin having a conversation with your lead. After typing your message, hit **Enter**, or click on the **Send** icon to send the message.



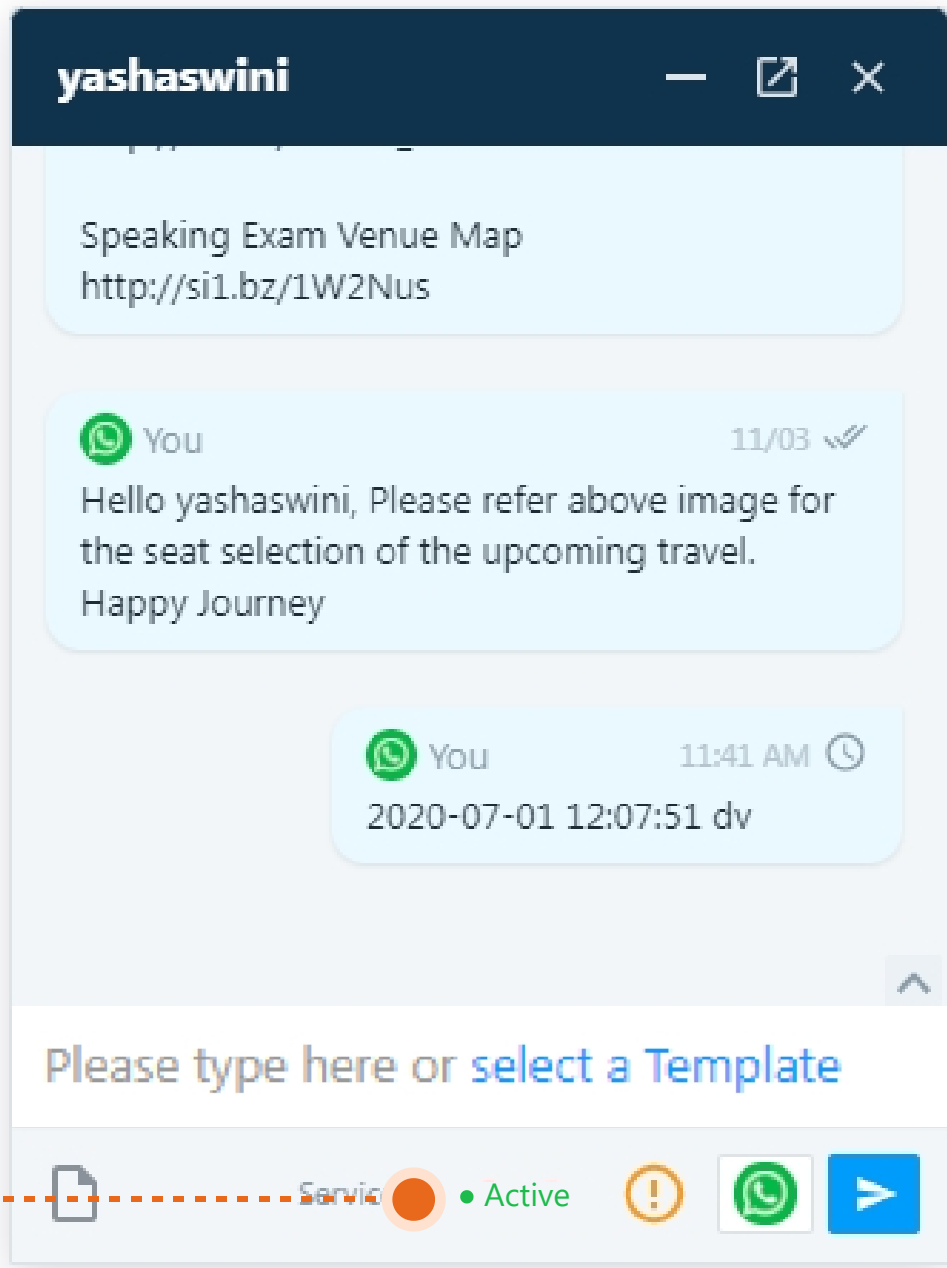
Service Window

On the Send WhatsApp Message pop-up, you will find the Service Window. While using this window, you should remember the following -

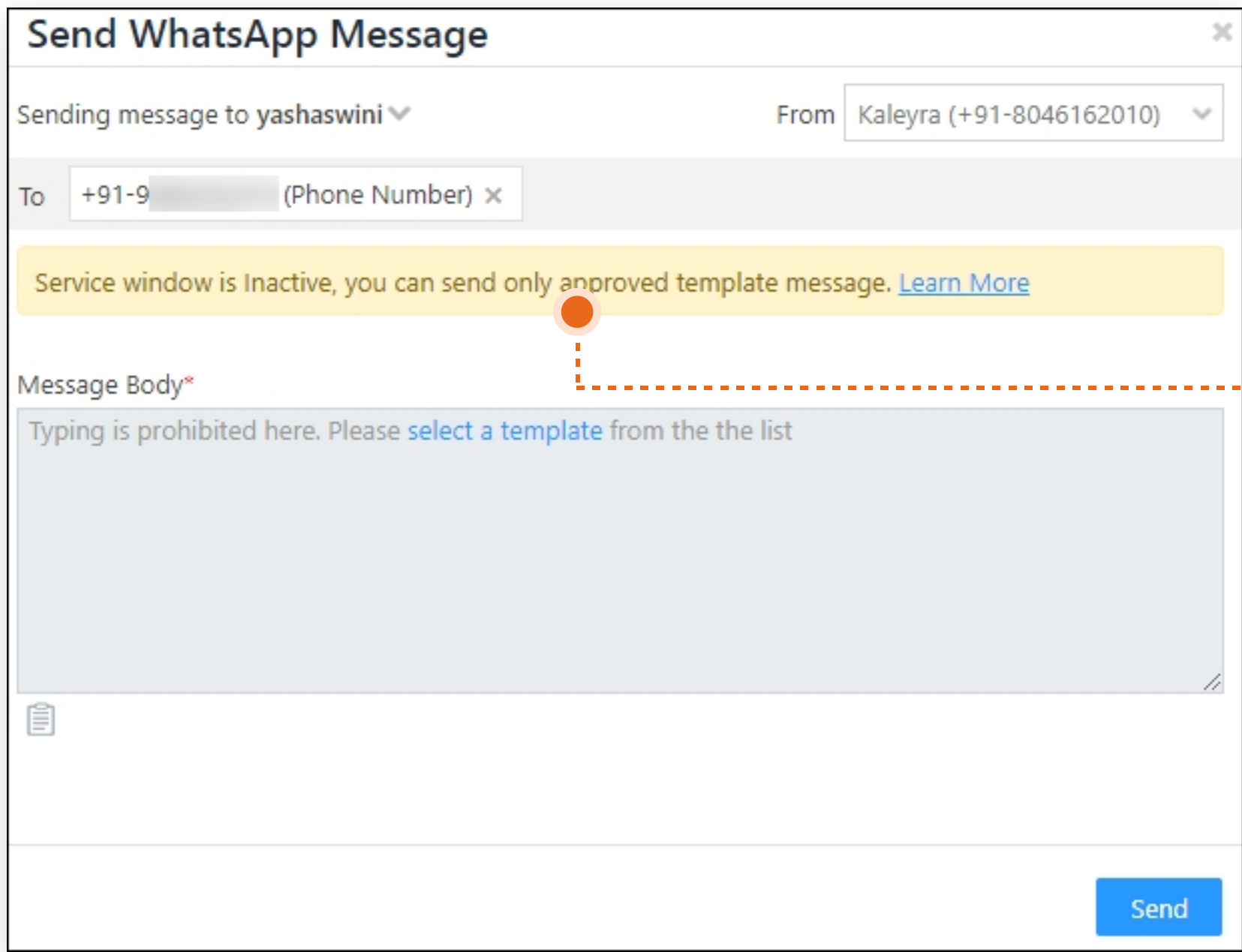
- The first message you send to a lead on WhatsApp can only be a template message. Navigate to **Apps>WhatsApp Templates** to add or edit a template.
- You cannot edit the template message in the **Send WhatsApp Message** pop-up.
- If a lead replies to your first message, Inactive will change to Active for a 24-hours.
- During this 24-hour window, you can send multiple customised messages, along with template messages.
- This window will get reset every time the lead replies to a message.



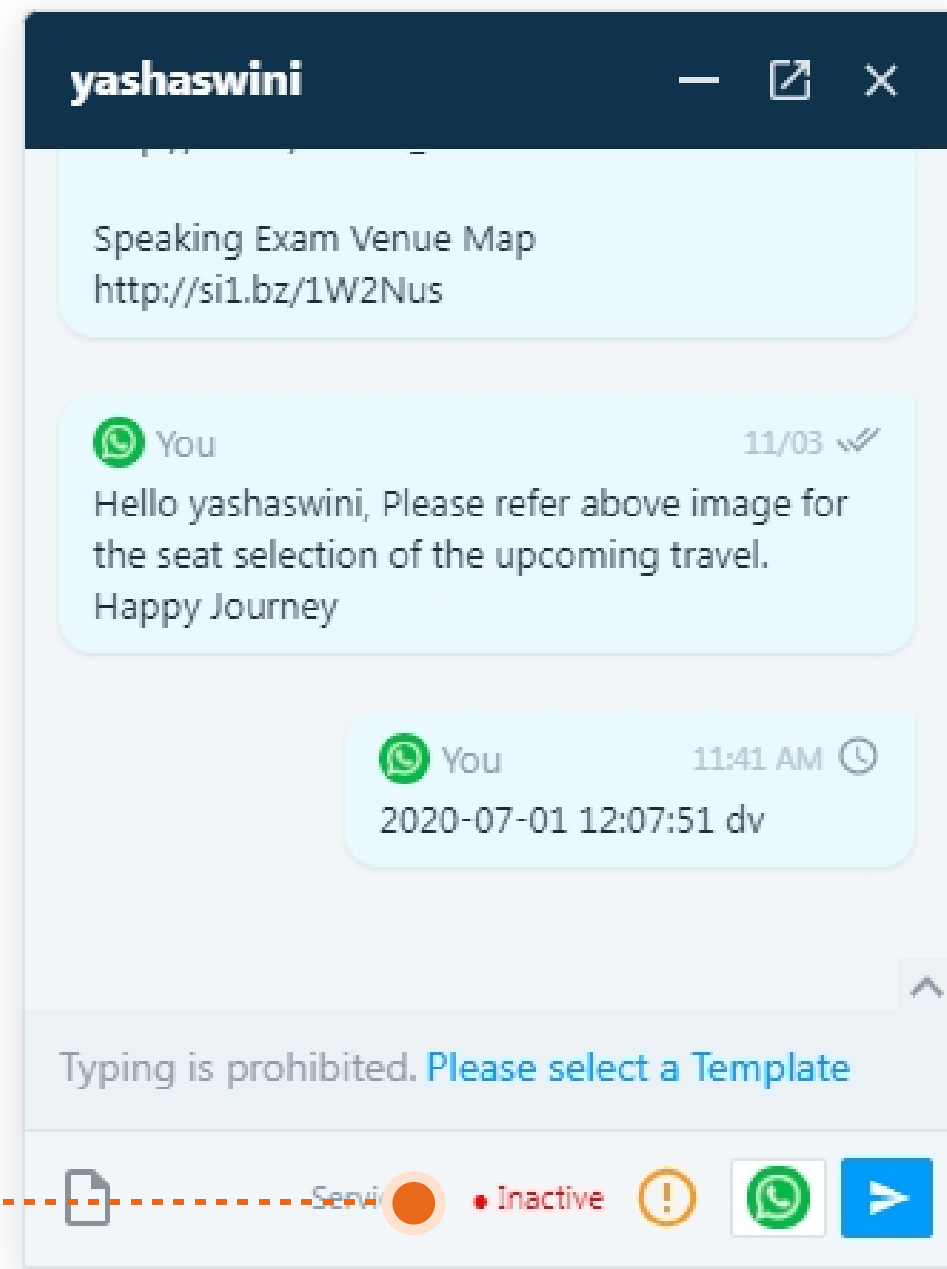
Service Window is Active



Service Window is Active in both the cases, user can type custom messages or can select templates for sending messages



Service Window is Inactive



Service Window is Inactive in both the cases, user needs to select templates for sending messages

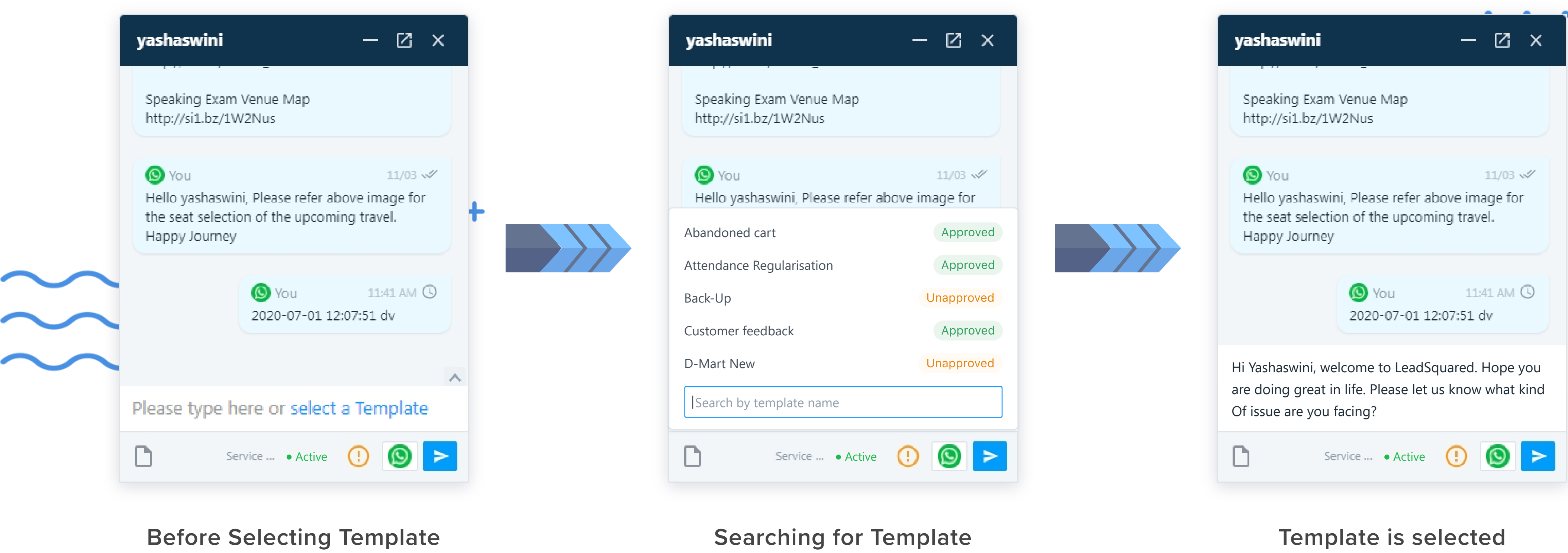
WhatsApp Templates

You can create customised WhatsApp templates, and attach it while conversing with your leads. To know how to create a template, please refer to the Adding WhatsApp Templates to LeadSquared in WhatsApp Connector article.

To add an existing template –

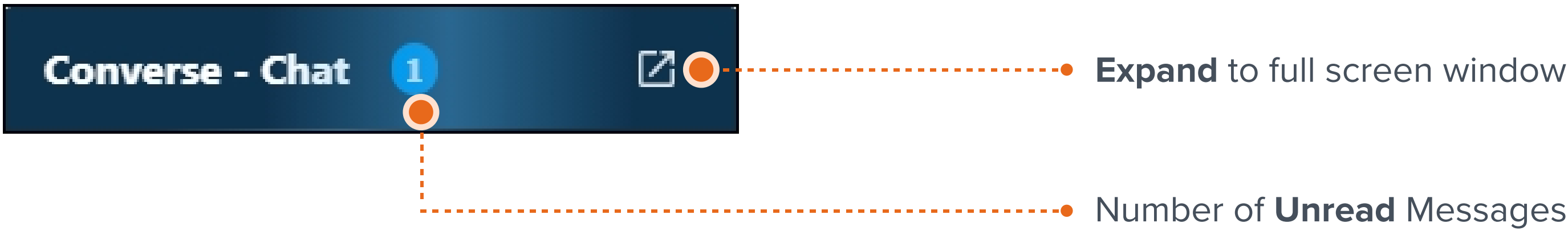
- On the chat pop-up, either click on **Select a Template**, or click the **Template** icon.
- From the list of existing templates, choose the template you wish to send to the lead.
- Hit **Enter**, or click on the **Send** icon to send the message.

Note: Users will be able to send images, videos and documents via templates, but they can't send those media files as Attachments as of now. Work is in progress for attaching files/documents while sending WhatsApp messages.



Unread WhatsApp Messages in Converse

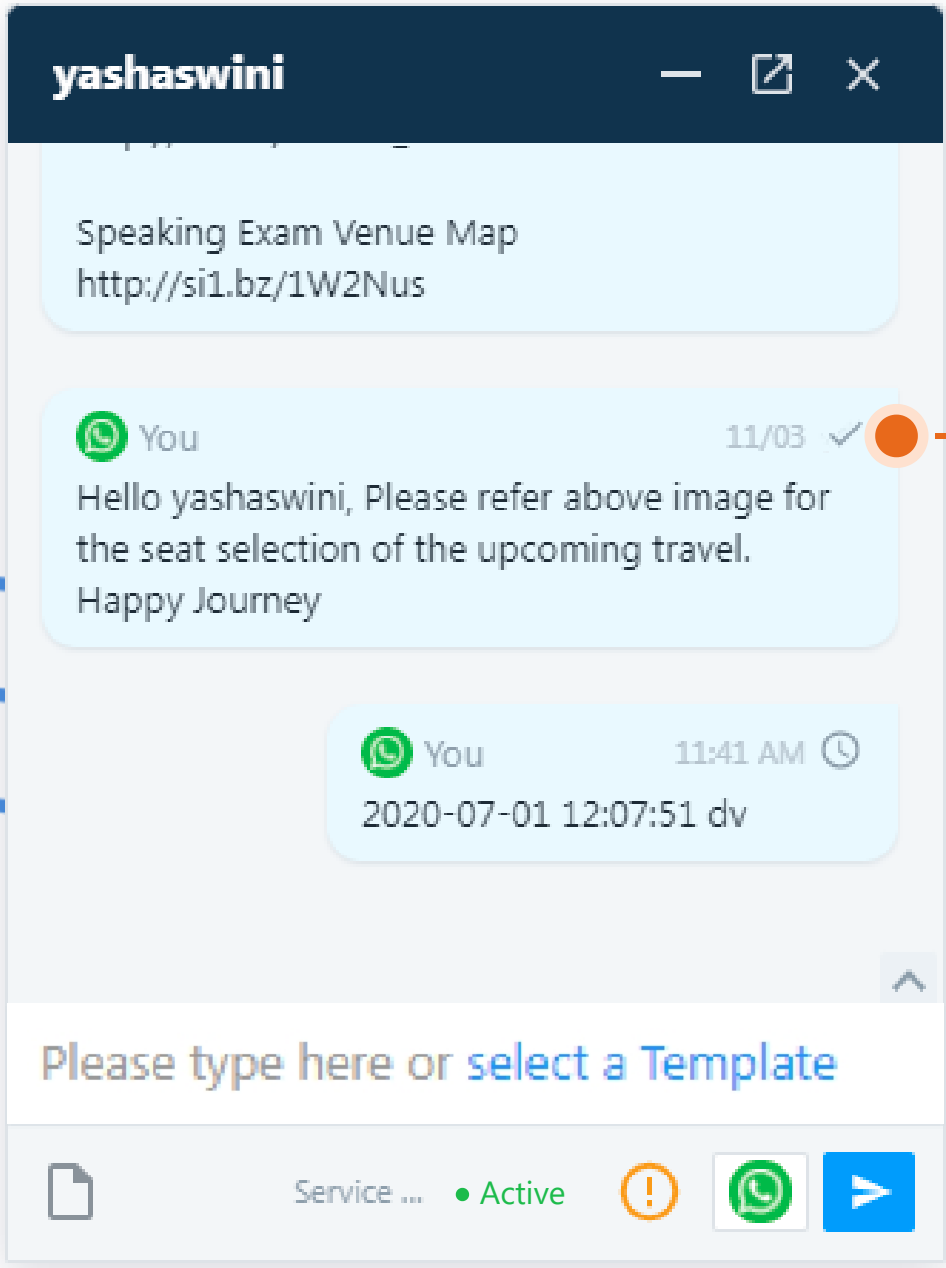
- If there's an unread message on the chat pop-up, then the number of messages will show up on it.
- To expand the chat window to full-screen mode, click the **Expand** icon.



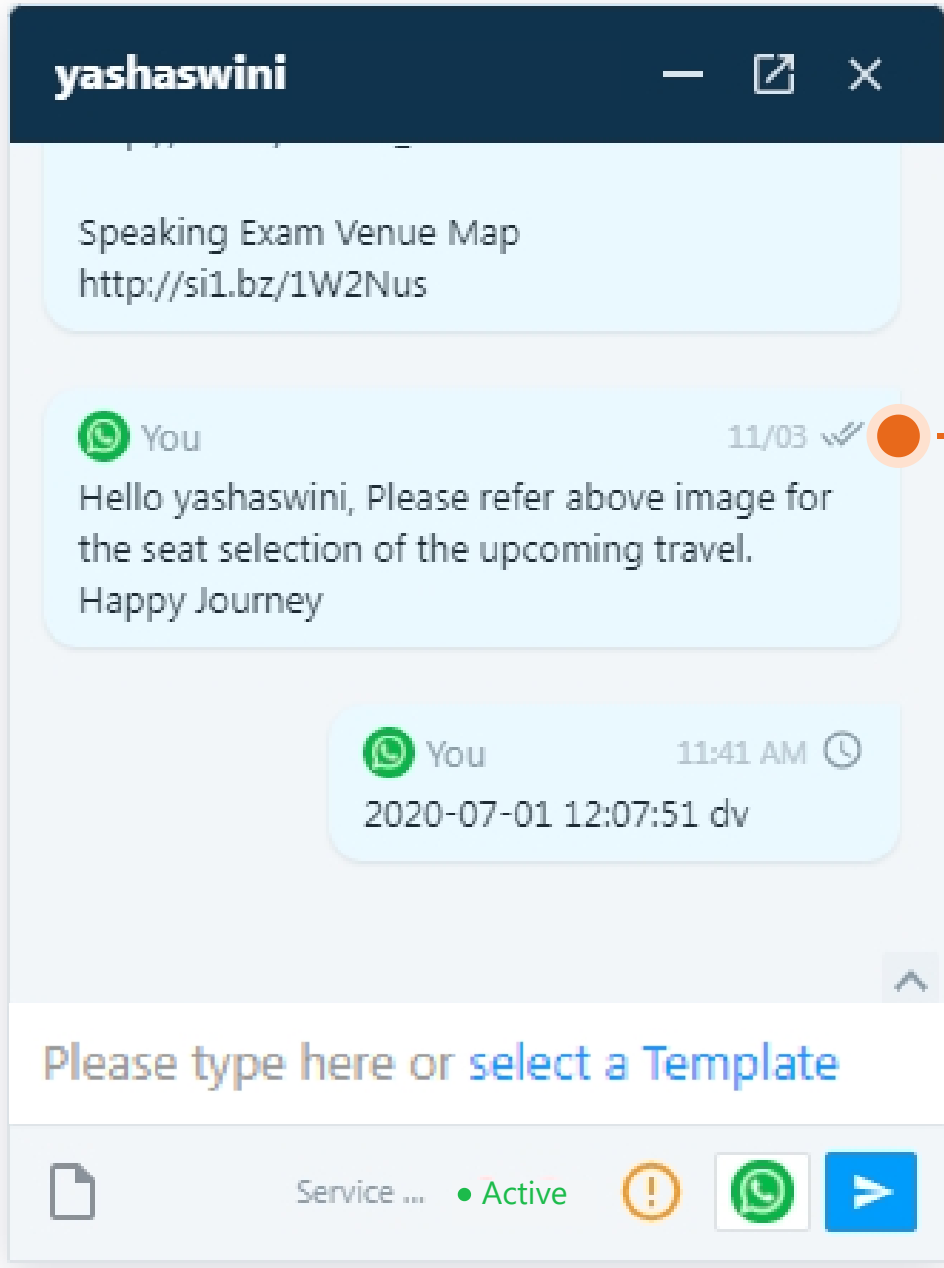
Status Notifications in Converse-WhatsApp

The WhatsApp-Converse sends notifications about the status of the message between you and your users. These notifications are sent via the statuses object. For each message, you receive a notification when the message is sent, delivered, read not sent yet.

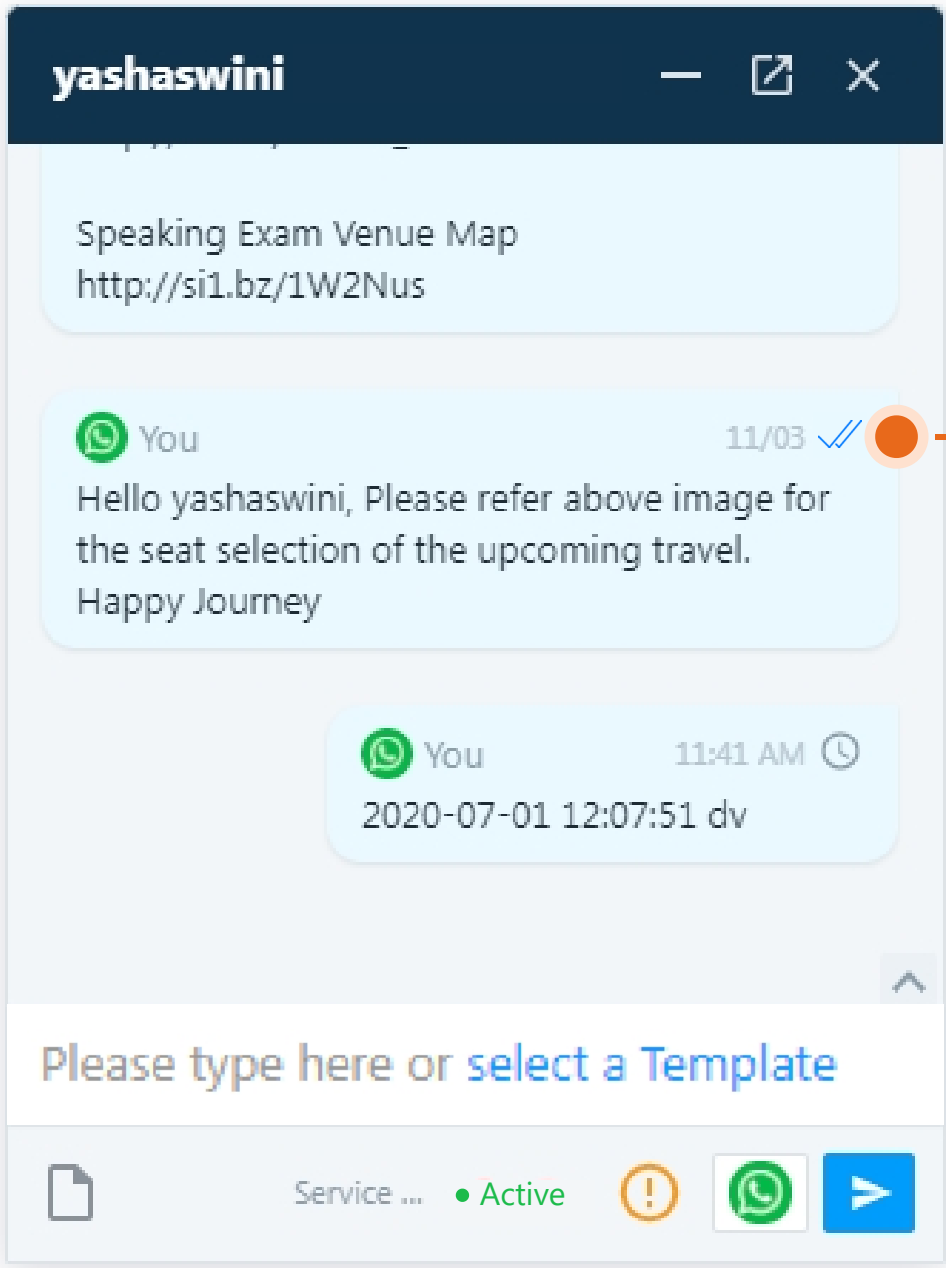
Status	Description	Icon/Device Equivalent
Sent	Message received by WhatsApp server	One checkmark
Delivered	Message delivered to recipient	Two checkmarks
Read	Message read by recipient	Two blue checkmarks
Not sent yet	Not delivered due to some issue (eg - network issues)	Clock icon



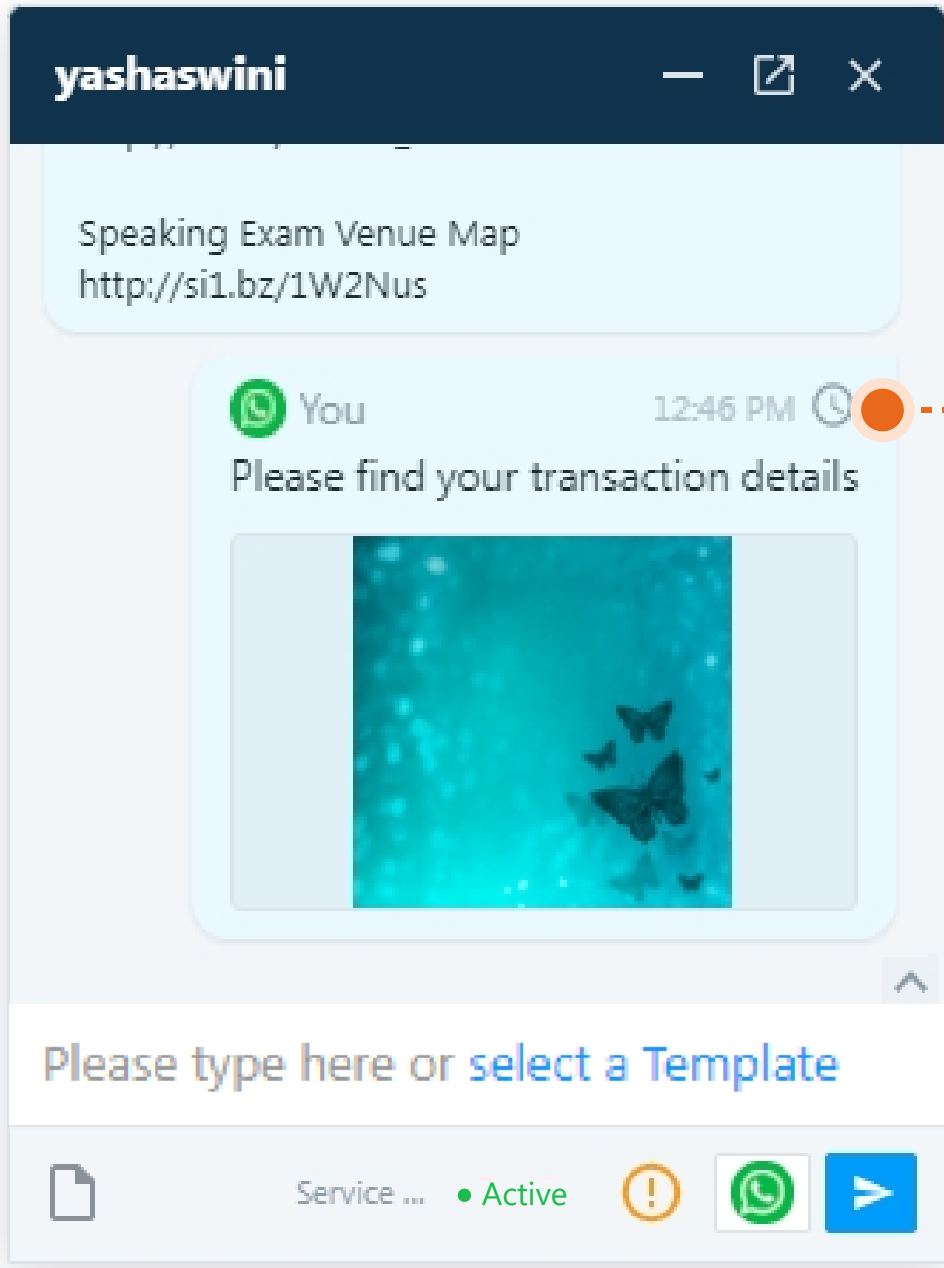
One checkmark
Message received by
WhatsApp server



Two checkmarks
Message delivered
to recipient



Two Blue checkmarks
Message read by
recipient



Clock Icon
Not delivered due to
some issue

Attachment Support in Converse-WhatsApp

Users will be able to send images (JPG, PNG), videos (MP4, 3GP) and documents (PDF) via templates, but they can't send those media files as attachments in this version of Converse. Team is currently working for attaching files/documents while sending WhatsApp messages.

The media file type formats are –

File Type	Format	Size
Images	image/jpeg, image/png	5 MB
Video	video/mp4, video/3gpp	16 MB
Documents	PDFs	100 MB

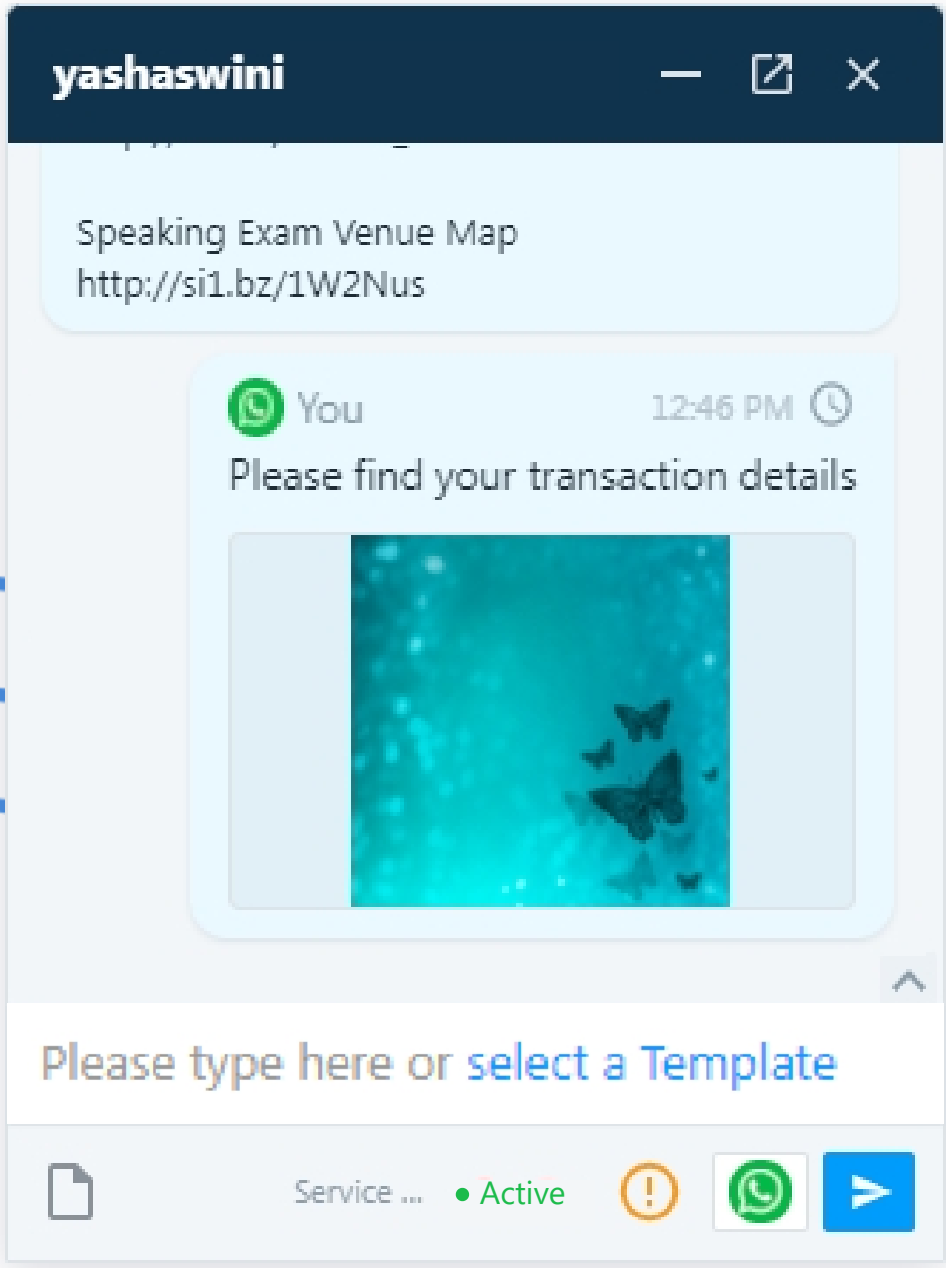
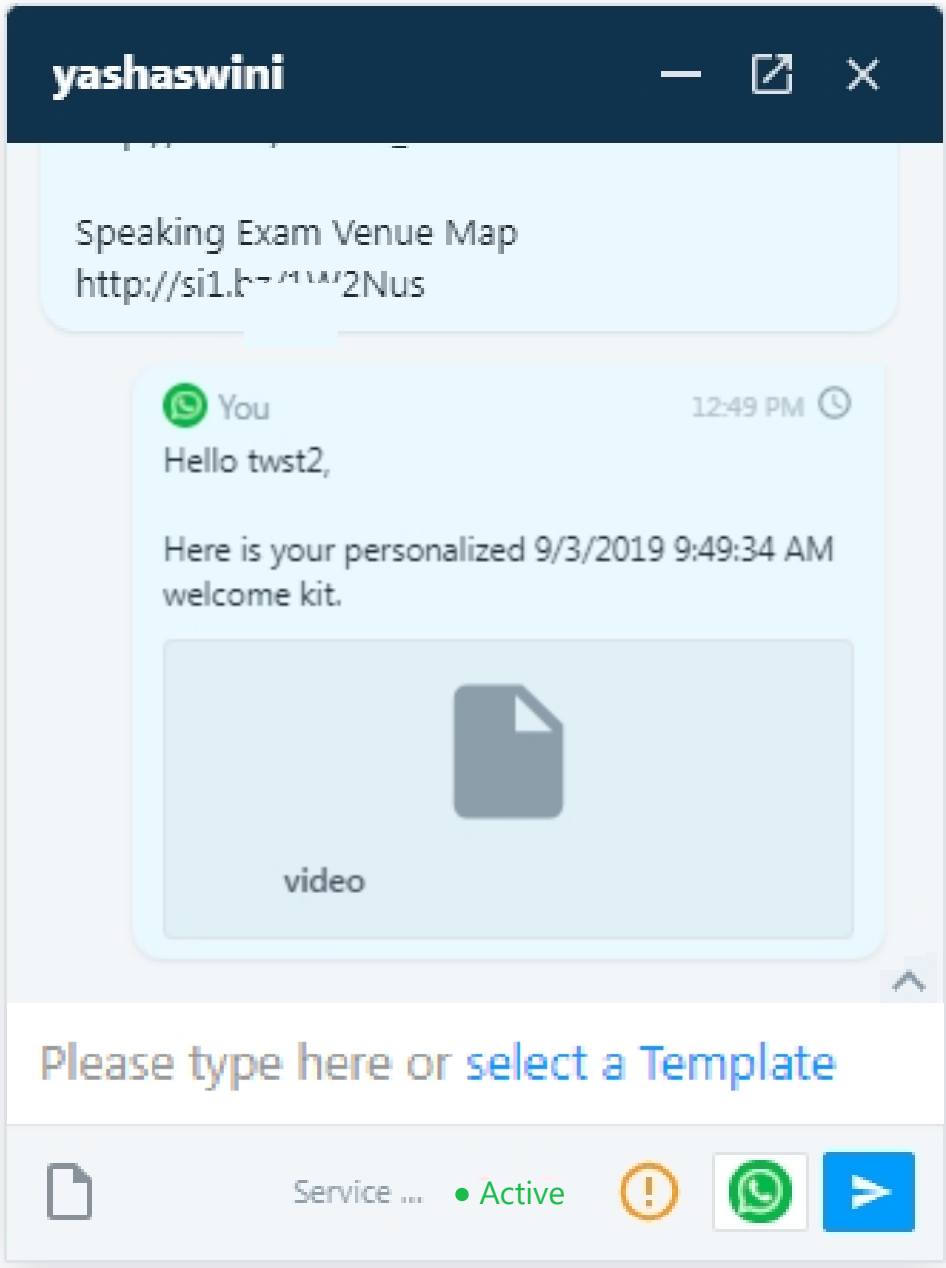
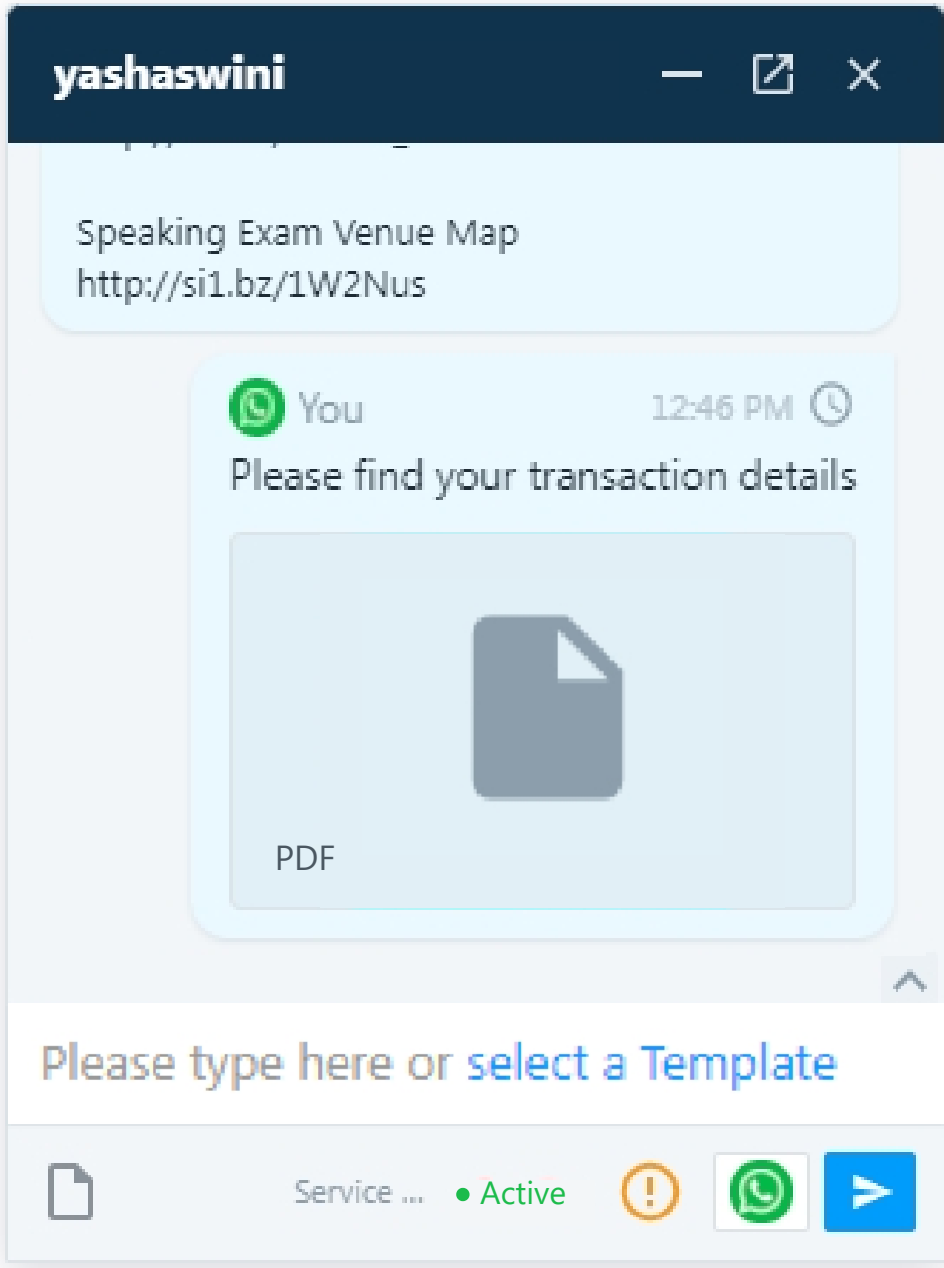


Image sending as part of template



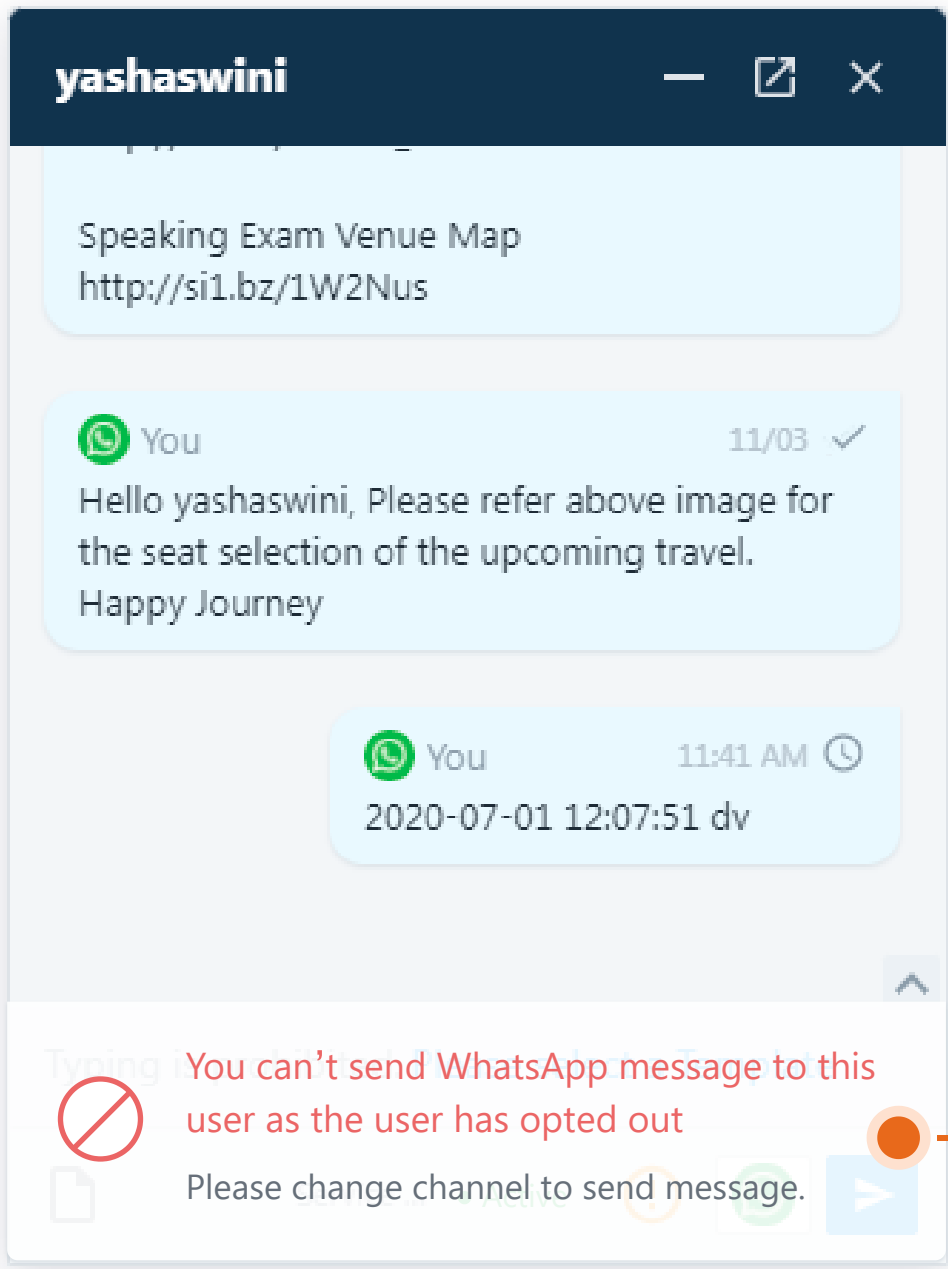
Video sending as part of template



Document sending as part of template

Opted-Out users in Converse

There is a LeadSquared lead field to the WhatsApp opt-out functionality. Your leads can opt out of receiving WhatsApp messages on the basis of this field.



WhatsApp Messages **can't be sent** to opted out users using Converse. There will be no provision to select any template or type custom messages

Frequently Asked Questions

Can I send WhatsApp Messages to opted out users using Converse?

No, you can't send WhatsApp Messages to opted out users using Converse. An error state will be shown to the user, and there will be no provision to select any template or type custom messages

Can I send Images, Videos or Documents in Converse?

Yes, you can send images, videos and documents via templates, but you can't send those media files as attachments as of now.

Can I send Unapproved Templates in Converse if service window is active?

Unapproved templates are deliverable if 24 hour window is active. While sending message if unapproved template is used outside 24 hours window this will give error on UI.

Can I see any attachments or emoji in incoming messages in Converse?

Yes, you'll be able to view emoji and attachments in incoming messages, you can download them as well.

Can I receive notifications via Converse?

Yes, you can receive notifications via Carter. Carter is Leadsquared's very own AI sales assistant. It keeps on sending you notifications about all the happenings and upcoming events via Converse.

Do I need to pay for Converse?

Yes you need to have a paid subscription for Converse. Please contact sales@leadsquared.com to get a quote.

“We’re enhancing the way people and businesses interact over mobile”

+



. converse

For a detailed documentation about the product, please visit : <https://help.leadsquared.com/whatsapp-business-messaging-connector/>

Need help? Get in touch with LeadSquared's support. Mail us at support@leadsquared.com

