



How to Message Smartly Using WhatsApp?

Customer satisfaction is the goal of any business that aims at improving user engagement. One way to achieve this is by providing users with omni-channel communication. Smart messaging is the need of the hour to facilitate business communication.

What is smart messaging?

Smart messaging in this context refers to facilitating user engagement with the following features,

- **WhatsApp Templates** are pre-approved, customizable messages for business-initiated chats. Official, opt-in-based messages for regular customer engagement.
- **Auto-response messages** are automated greetings and acknowledgments for incoming messages.
- **Canned messages** are quick-access, pre-written replies for time-saving efficiency.

WhatsApp template

WhatsApp templates are used to initiate a conversation with a user, and it is mandatory to begin a conversation. You cannot start a conversation without a WhatsApp template message. These messages are officially verified and approved by Meta and are sent only to contacts who opt-in for regular engagements with your business.

Steps to create a WhatsApp template

1. In **Zoho Voice** console, navigate to the **Integration** pane, and click the **Instant Messaging** tab.
2. Select **Configure for WhatsApp** and click on the **WhatsApp Templates** section.
3. Click the **Add Template** button to create a new template.
4. Provide a **template name**, the **template category**, and the **content** for the WhatsApp template message.

Note: The two types of template messages supported in WhatsApp integration with Zoho Voice are,

Utility: Includes messages like transaction confirmations, transaction updates, and/or post-purchase notifications. Used for a specific, agreed-upon request or transaction or to update a customer about an ongoing transaction.

Marketing: Includes promotions or offers, informational updates, or invitations for customers to respond/take action.

5. Click **Save** to create a template message.

Note: It takes **2-3 working days** for a WhatsApp template message to be approved by Facebook. Only approved WhatsApp template messages can be used to initiate a conversation.

Canned messages

Canned messages are **pre-drafted responses** that save the time and effort required to type frequently sent messages. Include a canned message in your message board in a matter of just a few keystrokes.

Create Canned Message: Click to add a new canned message.

Info: Commonly available across all the instant messaging services supported in Zoho Voice.

Name: Identifies a specific canned message by its name.

Tags: Tags constitute unique custom categories that help in the quick classification and retrieval of canned messages from a list of multiple canned messages.

Note: A canned message can possess multiple tags.

Steps to create a canned message

1. In **Zoho Voice** console, navigate to the **Settings** pane and click **Instant Messaging**.
2. In the **Canned Messages** tab, click the **Canned Message** button.
3. Provide the **message name**, **tag(s) to associate** with the message, and the **message**.
4. The placeholders provided below are dynamic texts, as they'll refer to the user/agent details as selected. For eg. The canned message **Hi {{contactName}}, How may I help you?** can be sent when a user starts a conversation. Here the placeholder `{{contactName}}` automatically changes to the name of the user.
5. Click **Save** to create a canned message.

Auto-response messages

Auto-response messages are **pre-written texts** that are automatically sent to customers when they initiate a conversation. Auto-responses can be used to greet customers and let them know that their message has been received.

Steps to create an auto-response message

1. In **Zoho Voice** console, navigate to the **Settings** pane and click **Instant Messaging**.
2. In the **Auto-Response** tab, click the **Auto-Response** button.
3. Provide the **message name**, **tag(s) to associate** with the message, and the **message**.
4. The placeholders provided below are **dynamic texts**, as they'll refer to the user/agent details as selected.
5. Click **Save** to create an auto-response message.