WhatsApp - Template Creation in Customer Portal

Introduction

For an end user to contact a business, they simply need to send any type of WhatsApp message at any given time, and the business will receive it and respond immediately.

Businesses that want to be able to contact their end users over WhatsApp need to register a template and have it approved by Meta.

There are three types of templates.

1. Marketing templates

2. Utility templates

3. Authentication templates

Each template serves for a different type of communication and a different type of message businesses want to communicate to their users.

Marketing template – The most flexible and rich-message friendly template. Businesses can use this template type for various types of promotions and product awareness.

Utility template – This is a slightly less flexible template than the Marketing one. Through Utility templates, businesses usually respond to a user-triggered action. For example, businesses can verify a purchase with an order number, send specific flight information, or collect after-flight surveys.

Authentication template – As the name suggests, this template is used for user verification and authentication.

Over Mitto Campaign Manager, you can register Marketing and Utility templates, and Authentication is available through our API.

To create WhatsApp templates over a Mitto Campaign Manager, you need an active Campaign Manager account and a registered WhatsApp Business account. If you don't have them, please ask your account manager to create them.

Setup

When you log in, the first thing you will see is your dashboard home page. On the left side, there is a menu where you can choose an action.

Choose "Templates" from the left menu.
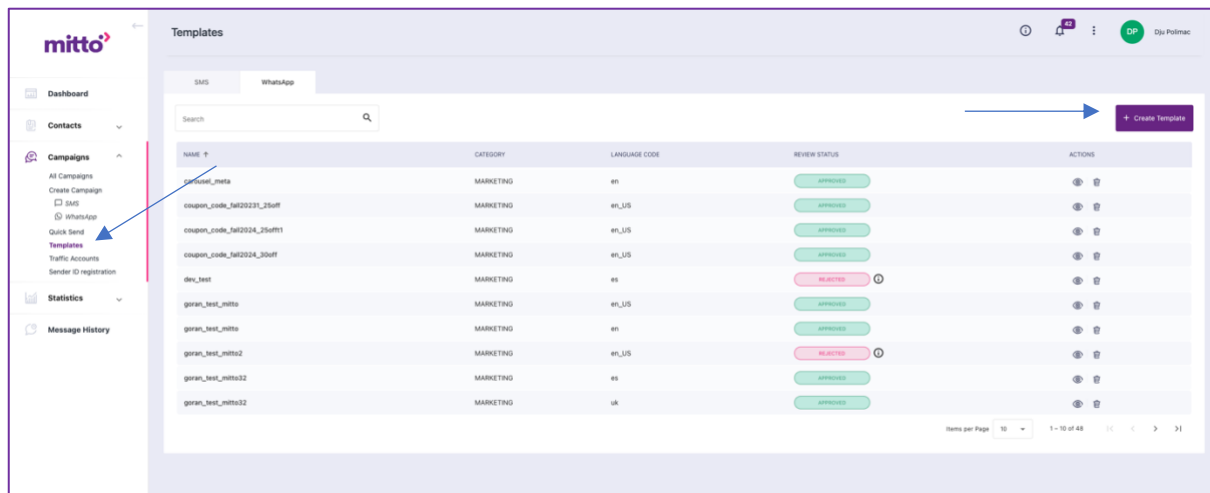
Here, you will see all of your existing templates (if there are any), and you can click the "Create Template" button in your top right corner.

The window with all the fields you must fill out to create a WhatsApp template will appear.

We will guide you step by step in creating a template.

Part 1 – Technical details

- Step 1: Template Name - Choose a unique and simple name for your template. The name must be easy to find in the future when sending a campaign or a quick message. Avoid using the same or similar names for your templates. The message template name field is limited to 512 characters.

- Step 2: From a drop-down menu, choose the language of your template. Templates can be registered in different languages; keep that in mind when naming a template.

- Step 3: If you have one WhatsApp Traffic Account (TA) with Mitto, you can choose only that account. However, if you have multiple TAs, you can choose which one you want to create a template for.

- Step 4: Choose a template Category. In Mitto Campaign Manager, you can create Marketing and Utility templates.

  - *Marketing templates are most flexible. They can enable businesses to achieve a wide range of goals, from generating awareness to driving sales and more.

Message Objective	Business Goal	Example Templates
Awareness	Generate awareness of your business, products, or services among customers who have subscribed to receive messages from your business on WhatsApp.	"Did you know? We installed a new tower in your area so you can enjoy a better network experience. To learn more, visit our site {{1}}." "Diwali is around the corner! Join us at {{1}} on October 24 to celebrate with friends and family. For more details about our event, click {{2}}." "Looking for a getaway this fall? Our newest resort just opened in {{1}}: the perfect place to relax and unwind. Learn more here: {{2}}"

Sales	Send general promotional offers to customers related to sales events, coupons or other content intended to drive sales.	"As a thank you for your last order, please enjoy 15% off your next order. Use code LOYAL15 at checkout. Visit our site here {{1}}." "Refer → save! Use code FRIEND so you both earn $10 off your next order." "Upgrade to our Premium cabin to enjoy more benefits, like additional legroom and priority boarding. Click {{1}} or log into our app to upgrade." "You have been pre-approved for our credit card! Enjoy an introductory offer of {{1}} if you apply via your personalized link: {{2}}." "Don't forget! Today only, get double points on your purchases. Visit your nearest store and use your phone number at check-out."
Retargeting	Promote relevant offers or other call-to-actions to customers who may have visited your website, used your app, or engaged with your products and services.	"Don't miss out on your favorite shows! Re-subscribe now: {{1}}" "You left items in your cart! Don't worry, we saved them for you. Click here to checkout now: {{1}}." "Thank you for visiting our site. You can secure your health insurance in a few easy clicks – continue here: {{1}}." "You didn't finish your application! Please log into your profile here to pick up where you left off: {{1}}." "We miss you! Join us for an afternoon or evening of fun with your family. Click here to book with a special rate: {{1}}."

App Promotion	Request customers to install or take a specific action with your app.	"Did you know? You can now checkout in our app. Download it here {{1}} to check out our streamlined experience." "Thank you for using our app. We noticed you have not used our latest feature, {{1}}. Click here {{2}} to learn more about how this benefits you!" "In-app only: 20% off this week! Use code SUMMER20 to save on select styles. To download our app, click here: {{1}}." "Hi {{1}}, your friend {{2}} recently joined our community. Send them a welcome message today: {{1}}"
Build Customer Relationships	Strengthen customer relationships through personalized messages or by prompting new conversations.	"{{1}}, did you think we'd forget? No way! Happy birthday! We wish you the best in the year ahead." "As we approach the end of the year, we reflect on what drives us: You. Thank you for being a valued customer. We look forward to continuing to serve you" "Hello, I am the new virtual assistant. I can help you discover products or provide support. Please reach out if I can help!"

Also considered marketing templates are:

- o Templates with mixed content (e.g. Both utility and marketing, such as order update with a promo or offer).

- o Templates where contents are unclear (e.g., contents are only "{{1}}" or "Congratulations!").

- o Note: Examples are illustrative only, templates containing similar content or content including this example text may be categorized differently based on their exact content.

- o Utility templates

o *Utility templates are typically triggered by a user action or request. They must include specificity about the active or ongoing transaction, account, subscription or interaction to which they relate. For example, an order confirmation must contain an order number.

Message Objective	Business Goal	Example Templates
Opt-In Management on WhatsApp	Confirm opt-in for receiving messages on WhatsApp as a follow-up to opt-in collected via other channels (e.g., website, email). Also confirm opt-out.	"Thanks for confirming opt-in! You're in. You'll now receive notifications via WhatsApp." "Thank you for confirming your opt-out preference. You will no longer receive messages from us on WhatsApp."
Order Management	Confirm, update, or cancel an order or transaction with a customer using specific order or transaction details in the body of your message.	"Thank you! Your order {{1}} is confirmed. We will let you know once your package is on its way." "Hooray! Your package from order {{1}} is on its way. Your tracking number is {{2}} and expected delivery date is {{3}}." "Unfortunately, one item from your order {{1}} is backordered. We will follow up with an estimated ship date. If you wish to cancel and receive a refund, please click here: {{2}}" "We have received your item from order {{1}}. Your refund for {{2}} has been processed. Thank you for your business."

Account Alerts or Updates	Send important account updates, including time-sensitive alerts, safety information, payment reminders, and other information relevant to already-purchased or subscribed products and services. These messages should not intend to upsell or cross-sell new products or services.	"Daily update for account ending in {{1}}: Your balance is {{2}}." "Reminder: Your monthly payment for your subscription to {{1}} will be billed on {{2}} to the card you have saved on file." "To finish setting up your profile, you need to upload a photo. Please click here to upload: {{1}}." "The product you ordered {{1}} on {{2}} has been recalled. Please click here {{3}} to learn more." "There is a tornado alert in your area. We recommend you remain indoors until {{1}} o'clock today."
Feedback Surveys	Collect feedback on previous orders, interactions or ongoing relationships with customers. These messages should not be about requesting feedback related to potential upsell or cross-sell opportunities.	"We have delivered your order {{1}}! Please let us know if there was any issue by reaching out here: {{2}}." "Your feedback ensures we continually improve. Please click here {{1}} to share your thoughts on your recent visit at our {{2}} location. Thank you in advance!" "You chatted with us online recently about order {{1}}. How was your experience? Click to fill out a short survey: {{2}}."
Continue a Conversation on WhatsApp	Send a message to start an interaction on WhatsApp that began in another channel. These messages should not be initiated without a user having requested the conversation to be moved to WhatsApp.	"Hi! I see you requested support via our online chat. I am the virtual assistant on WhatsApp. How can I help?" "Hi {{1}}, we are following up on your call with customer service on {{2}}. Your case has progressed to the next step. Please log into your account to continue: {{3}}."

Note: Examples are illustrative only, templates containing similar content or content including this example text may be categorized differently based on their exact content.

Part 2 – Content

- **Step 1:** Header - Headers are optional components that appear at the top of template messages. They support text, media (images, videos, documents), and locations. Templates are limited to one header component, and header text can be a maximum of 60 characters.

- **Step 2:** Body - Enter the message's body. All templates require body components, which are text-only. Templates are limited to one body component with 1024 characters maximum.

- **Step 3:** Footer - Footers are optional text-only components that appear immediately after the body component. Templates are limited to one footer component. 60 characters maximum.

- **Step 4:** Button - Buttons are optional interactive components that perform specific actions when tapped. Templates can have up to 10 button components, although there are limits to individual buttons of the same type and combination limits. If you add more than 3 buttons, they will appear in a list.

There are three types of buttons:

1. Call (Phone Number Button)

2. URL Buttons

3. Quick Reply

Call (Phone Number Button)

When tapped by the app user, the phone number buttons call the specified business phone number. Templates are limited to one phone number button.

URL Buttons

URL buttons load the specified URL in the device's default web browser when tapped by the app user. Templates are limited to two URL buttons.

Quick Reply Buttons

When tapped by the app user, quick reply buttons are custom text-only buttons that immediately message you with the specified text string. A common use case-case is a button that allows your customer to easily opt-out of any marketing messages.

Templates are limited to 10 quick reply buttons. If quick reply buttons are used with other buttons, the buttons must be organized into two groups: quick reply buttons and non-quick reply buttons.

Examples of valid groupings:

- *Quick Reply, Quick Reply*

- *Quick Reply, Quick Reply, URL, Phone*

- *URL, Phone, Quick Reply, Quick Reply*

Examples of invalid groupings:

- *Quick Reply, URL, Quick Reply*

- *URL, Quick Reply, URL*

Press "Send to review" at the end, and your template will be sent to Meta for review. It usually takes them a working day to approve or reject the template. If and when approved, your template will be visible on the initial dashboard.