WhatsApp Marketing Platform

Admin Guide

2026

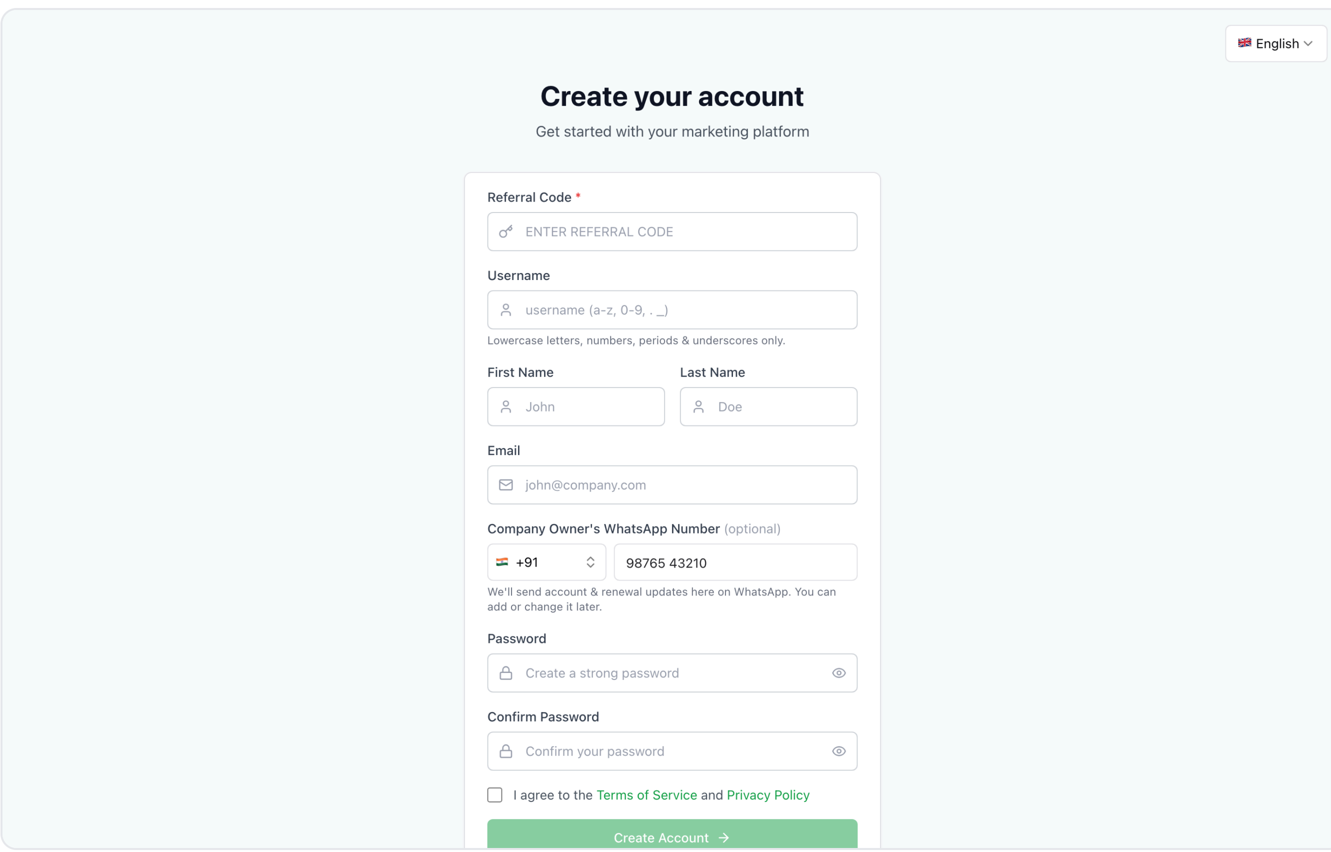
Contents

Creating your account

This module walks you through signing up for the platform, verifying your email, logging in, and setting up your personal profile. Signup happens on the public **Sign up** page; your profile lives under the **Account** menu at the bottom of the left sidebar once you are logged in.

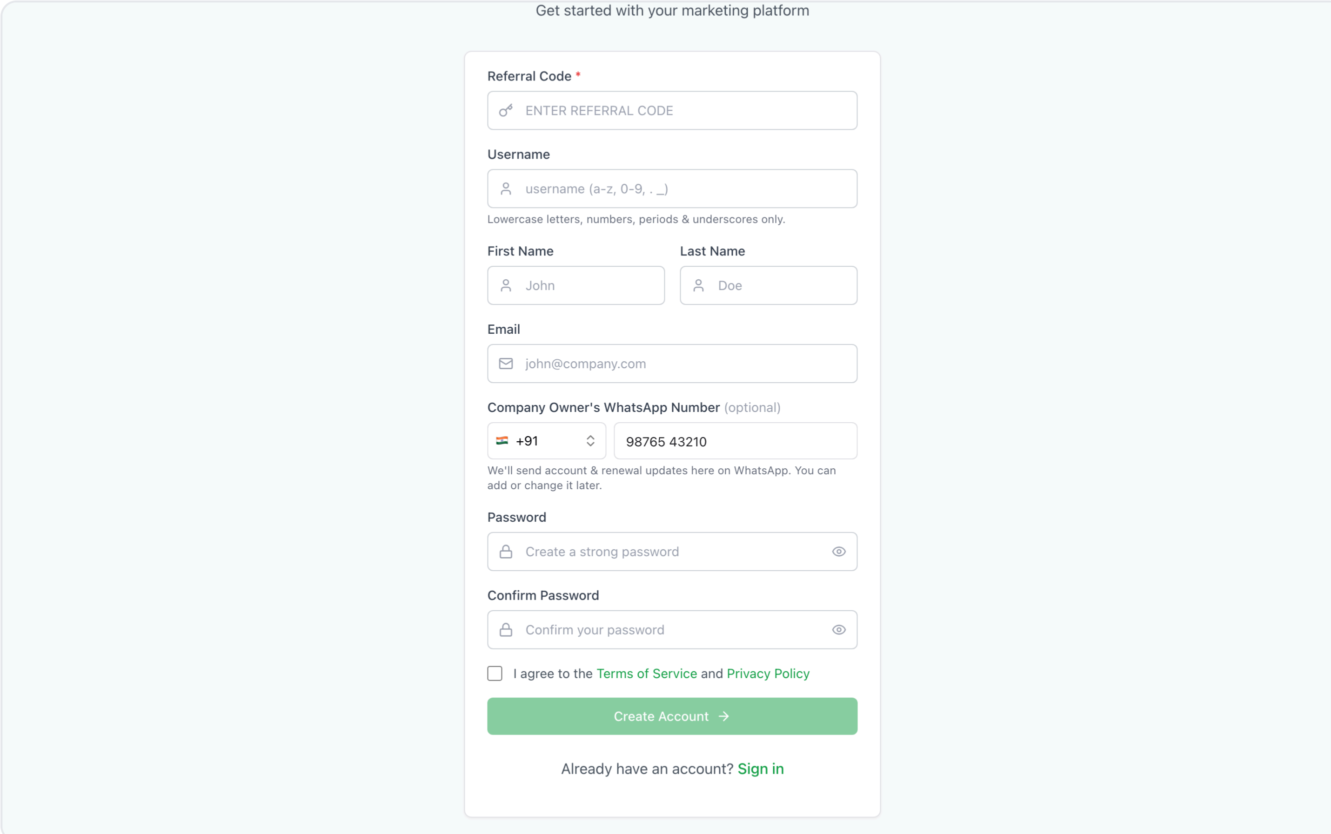
How to use (step by step)

1. **Open the Sign up page and enter your referral code.** On the signup form, the first field is **Referral Code** (marked with a red asterisk). Type the code your provider gave you and wait for the green check that confirms it is valid — the **Create Account** button stays disabled until the code is accepted.



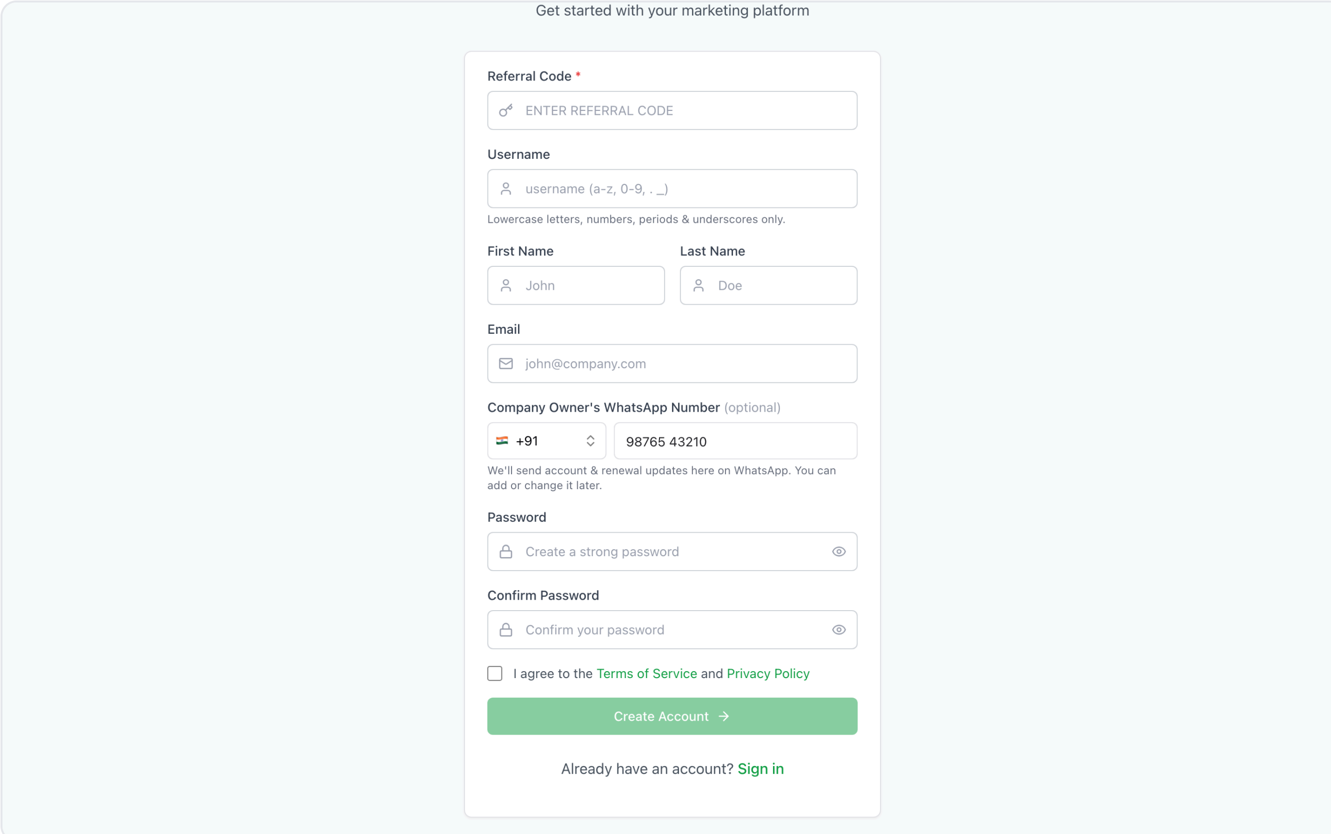
The Sign up page — Referral Code field being validated

1. **Choose a username.** In the **Username** field, enter a lowercase handle using only letters, numbers, dots or underscores (for example `john.doe`). The helper text under the field shows the allowed characters.



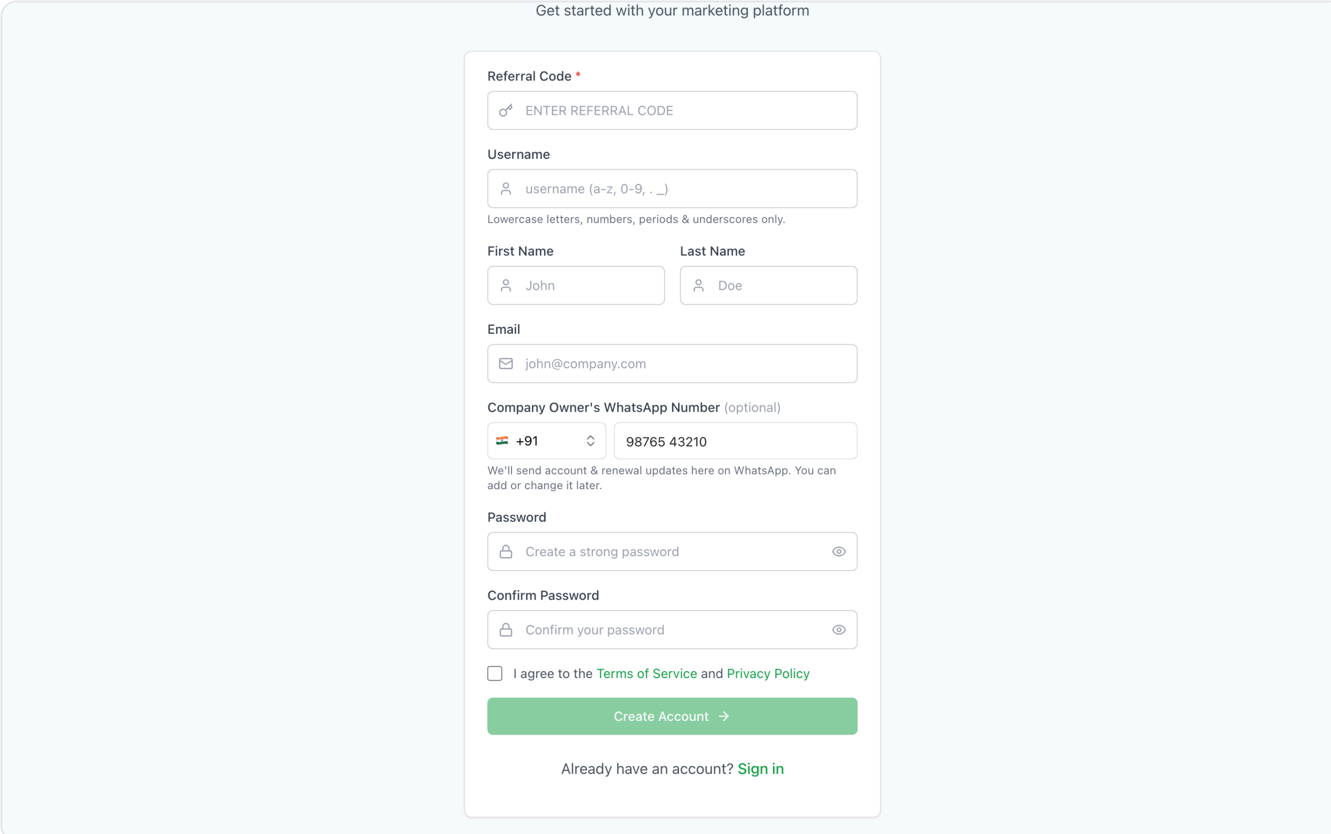
Username field accepting a-z, 0-9, . and _

1. **Enter your name.** Fill the **First Name** and **Last Name** fields (for example "John" and "Doe"). Both are required — this name is shown next to you in the Team Inbox and on assigned chats.



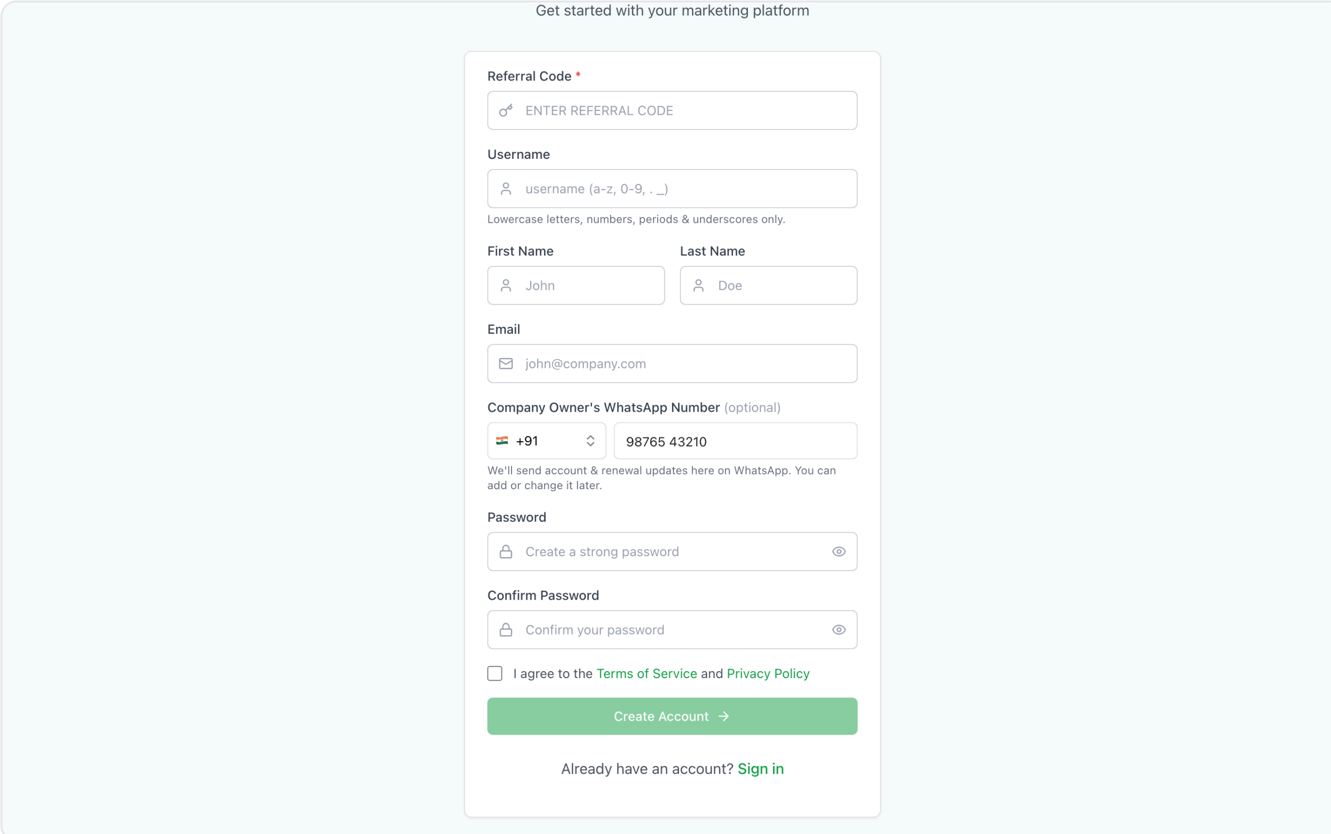
First and Last Name fields

1. **Add your email and phone number.** Type your work email in the **Email** field (for example `john@company.com`). The **Owner Number** field below it is optional — add your WhatsApp number so your provider can reach you about billing and renewals.



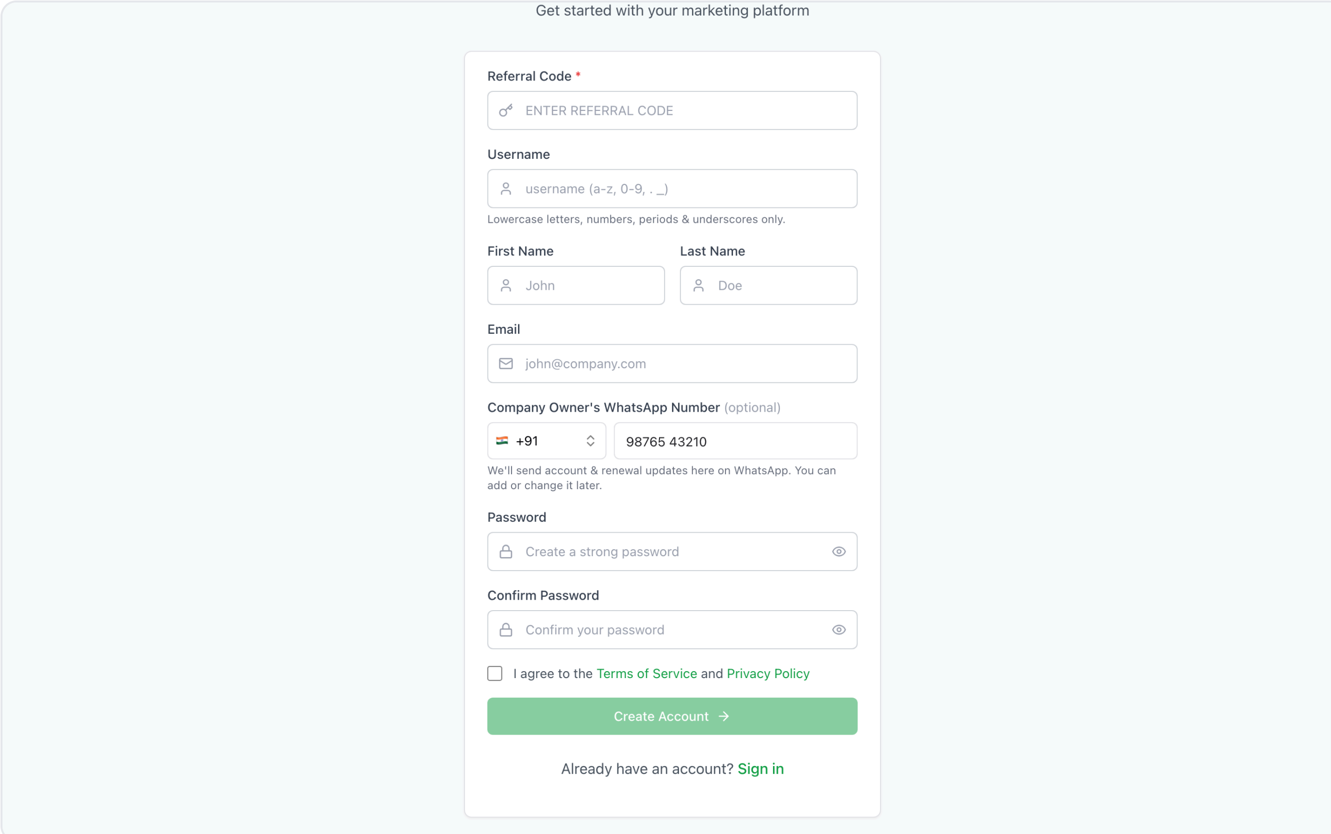
Email and optional Owner Number fields

1. **Set a password.** Enter a strong password in the **Password** field, then re-type it in **Confirm Password**. Use the eye icon at the right of each field to reveal what you typed; the two entries must match exactly.



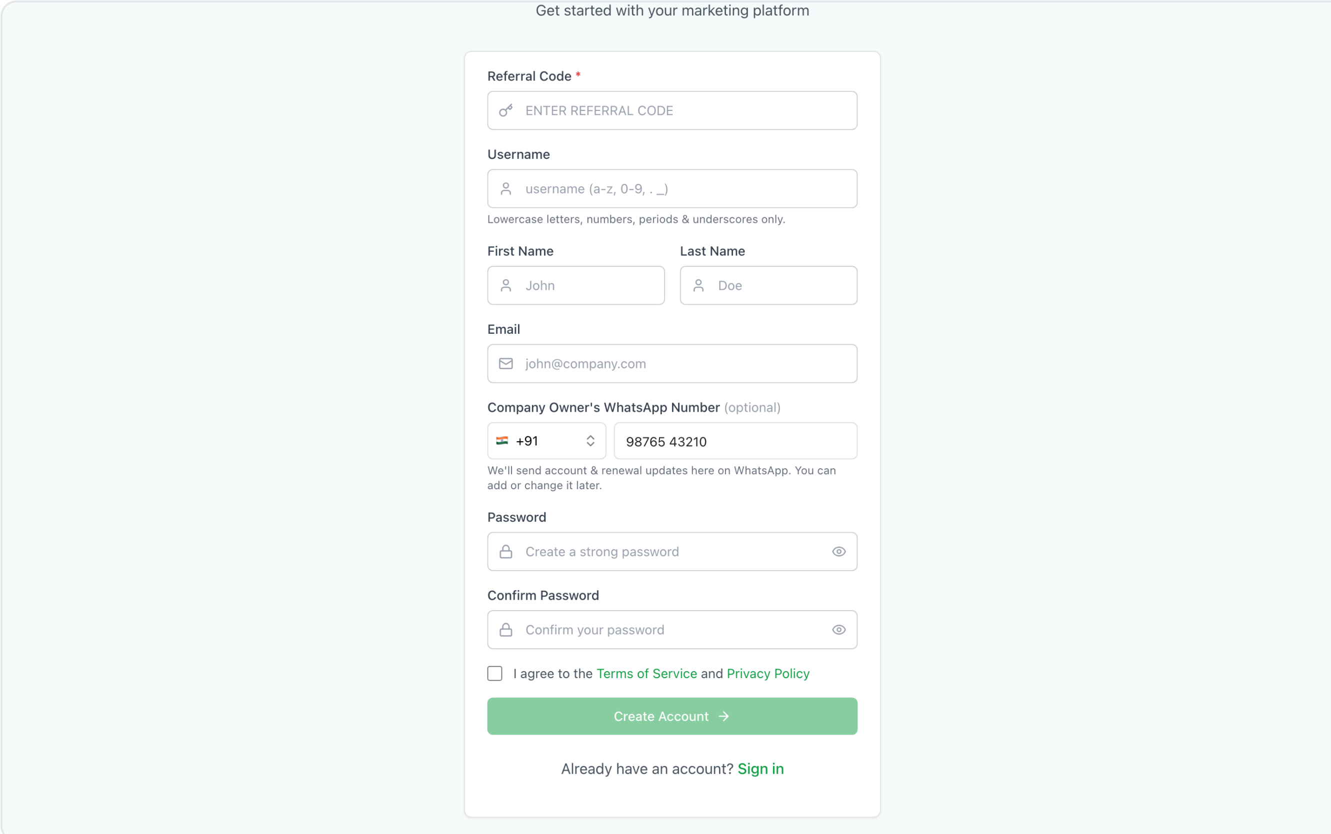
Password and Confirm Password with reveal icons

1. **Agree to the terms and submit.** Tick the **agree to terms** checkbox at the bottom of the form, then click the green **Create Account** button. A spinner shows while your account is created.



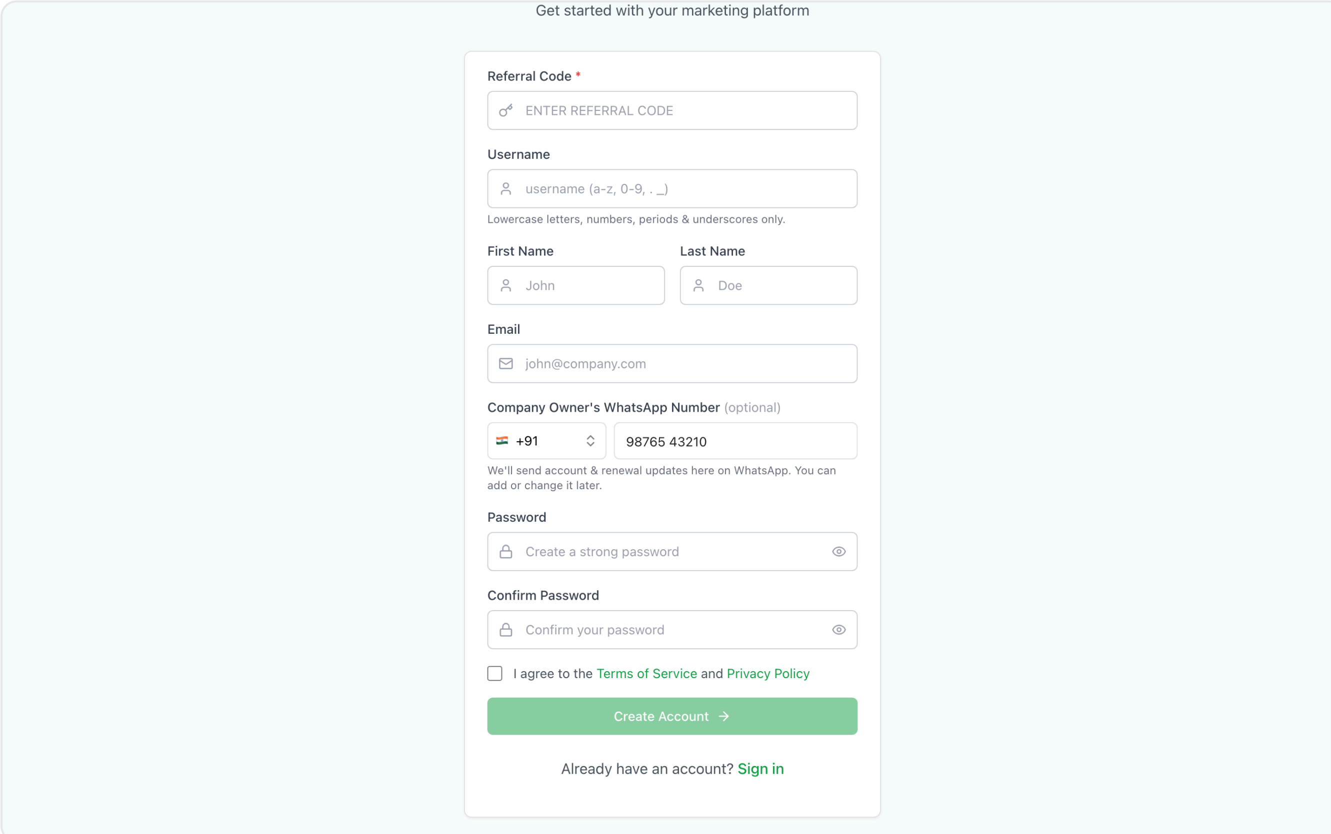
Agree-to-terms checkbox and the Create Account button

1. **Verify your email.** You are taken to a **Verify Email** screen. Open the email the platform sent you, copy the code (or click the link), enter it on this screen, and confirm. Then use **Sign in** to log in with your new username and password.



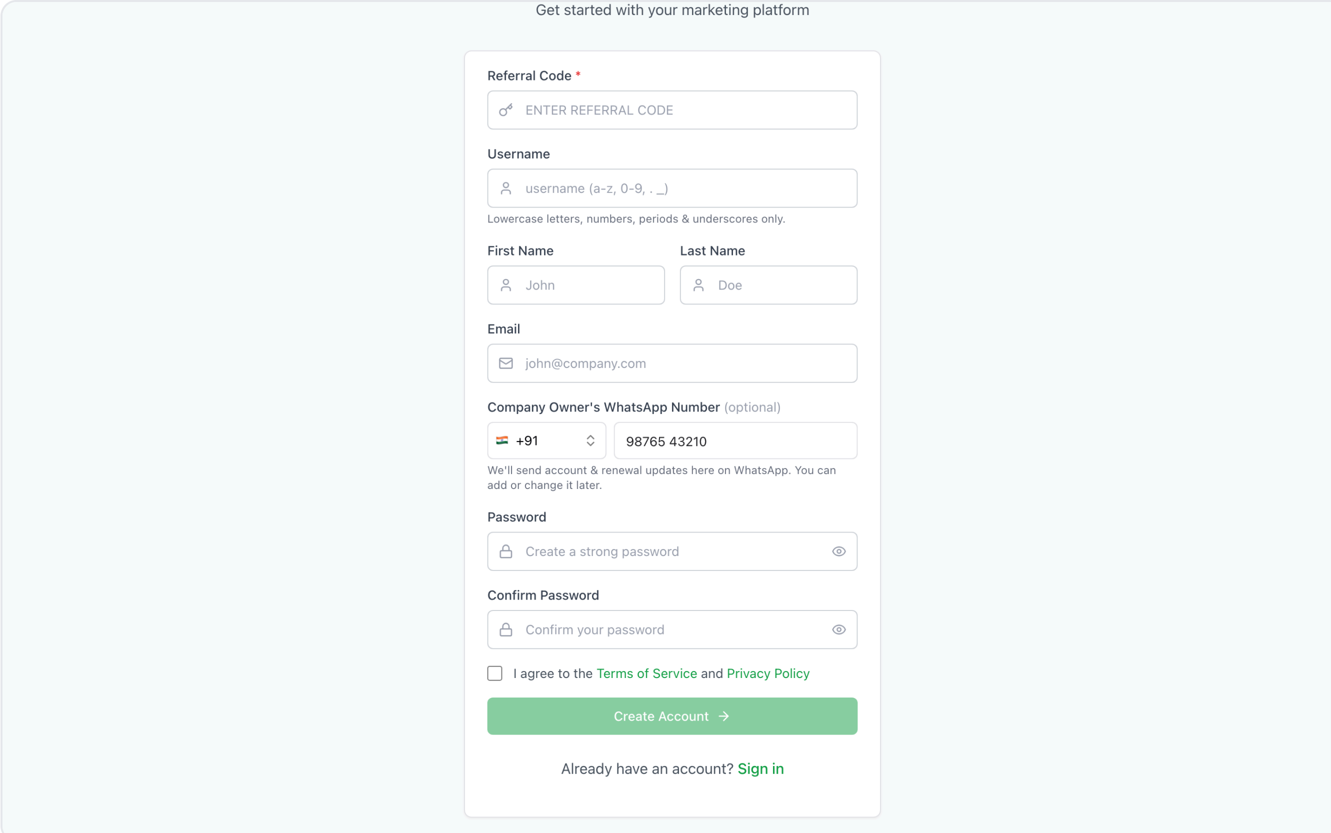
Email verification screen after signup

1. **Open your Account page to edit your profile.** After logging in, click your **profile avatar at the bottom-left of the sidebar**, then choose **Account**. Update your **First Name** and **Last Name** if needed and click **Save Changes** — your display name updates everywhere it appears.



Profile avatar menu — Account, Settings and Logout

1. **Change your password (optional).** On the Account page, open **Change Password**, enter your **Current Password**, then your **New Password**, and **Confirm** it. Click save — a confirmation toast appears when it succeeds.



Current, New and Confirm password fields

Tips

- Use a clear, real name — teammates and customers see it on assigned chats and replies, so "John Doe" is friendlier than a username.
- The **Create Account** button stays greyed out until the referral code shows a green check; if it never validates, ask your provider for the correct code.
- Account is your personal profile and password; **Settings** (also in the sidebar menu) holds channel, billing and AI configuration — they are separate screens.

FAQ

Q: My password change failed — why?

A: Make sure your **Current Password** is correct and that the **New Password** and **Confirm** fields match exactly.

Q: Can I change my email or role on the Account page?

A: No. Your role is set by your administrator, and email/login changes are handled by an admin, not from this page.

Q: I never received the verification email.

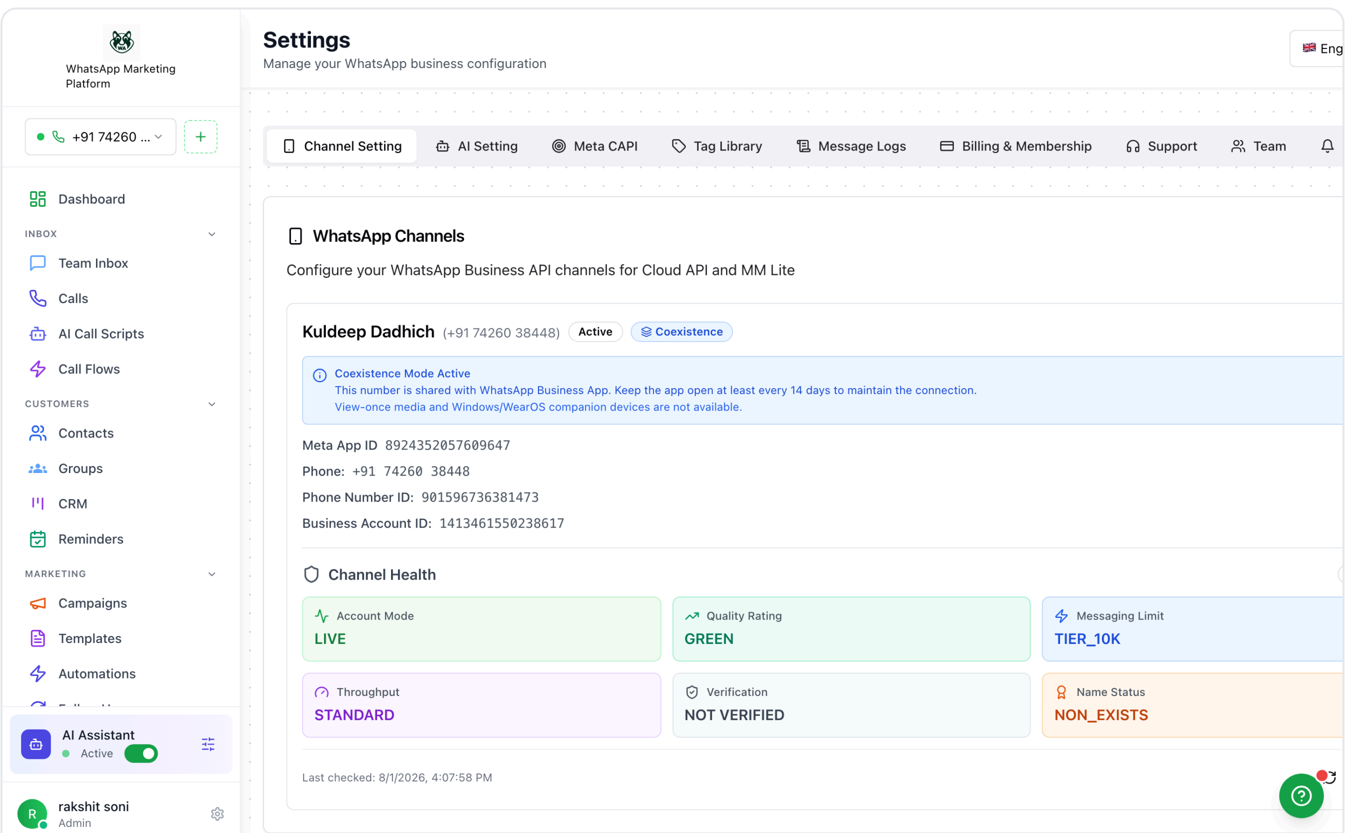
A: Check your spam folder first. If it still hasn't arrived, use the resend option on the Verify Email screen, and confirm you typed your email correctly at signup.

Connecting your WhatsApp channel

A "channel" is a WhatsApp Business phone number linked to the platform through the WhatsApp Cloud API. You must connect at least one channel before you can send messages, run campaigns, use the inbox, or set up automations. Channels live under **Settings → Channel Setting**.

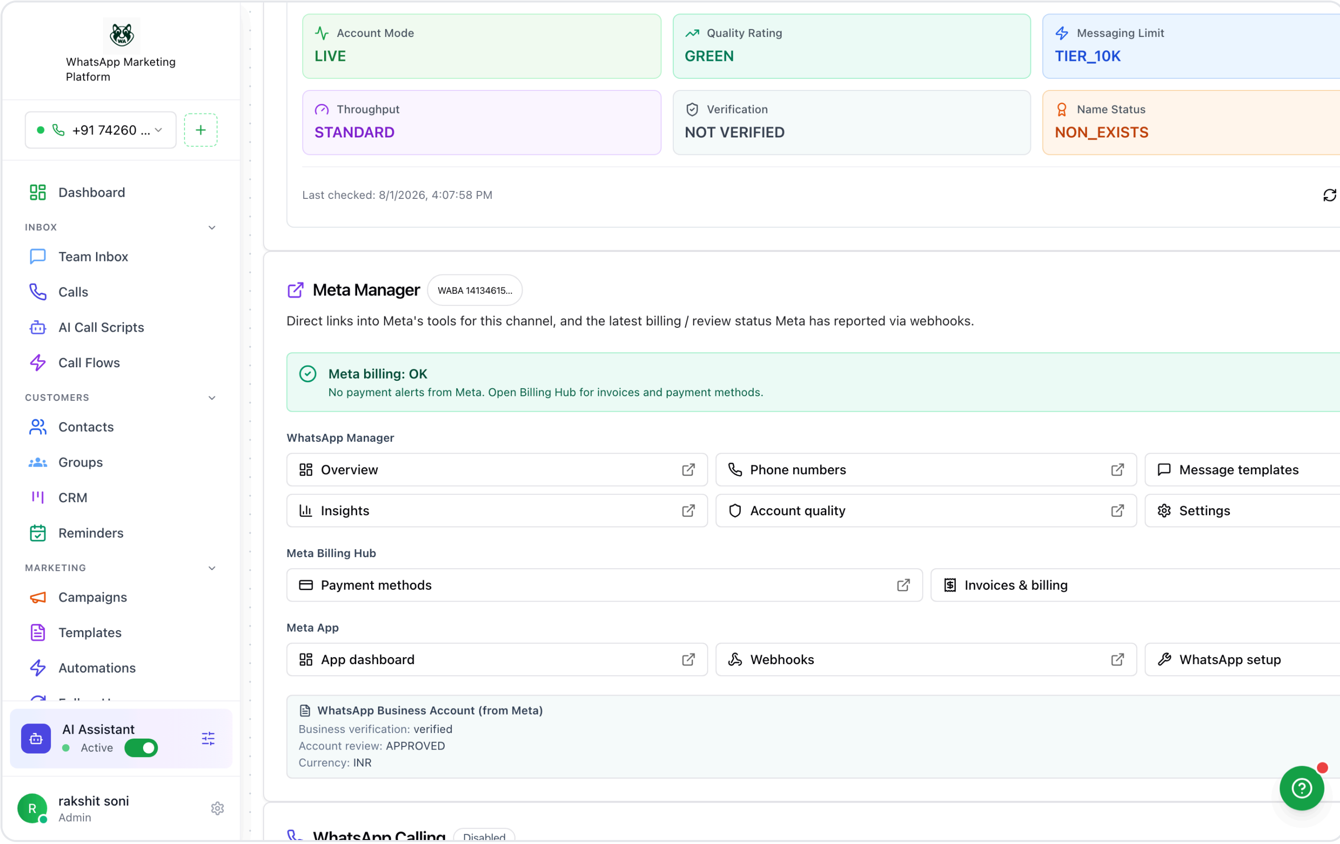
How to use (step by step)

1. **Open the Channel Setting tab.** Go to **Settings** from the left sidebar, then click the **Channel Setting** tab (the one with the phone icon) in the row of tabs across the top. This is where all your numbers are managed.



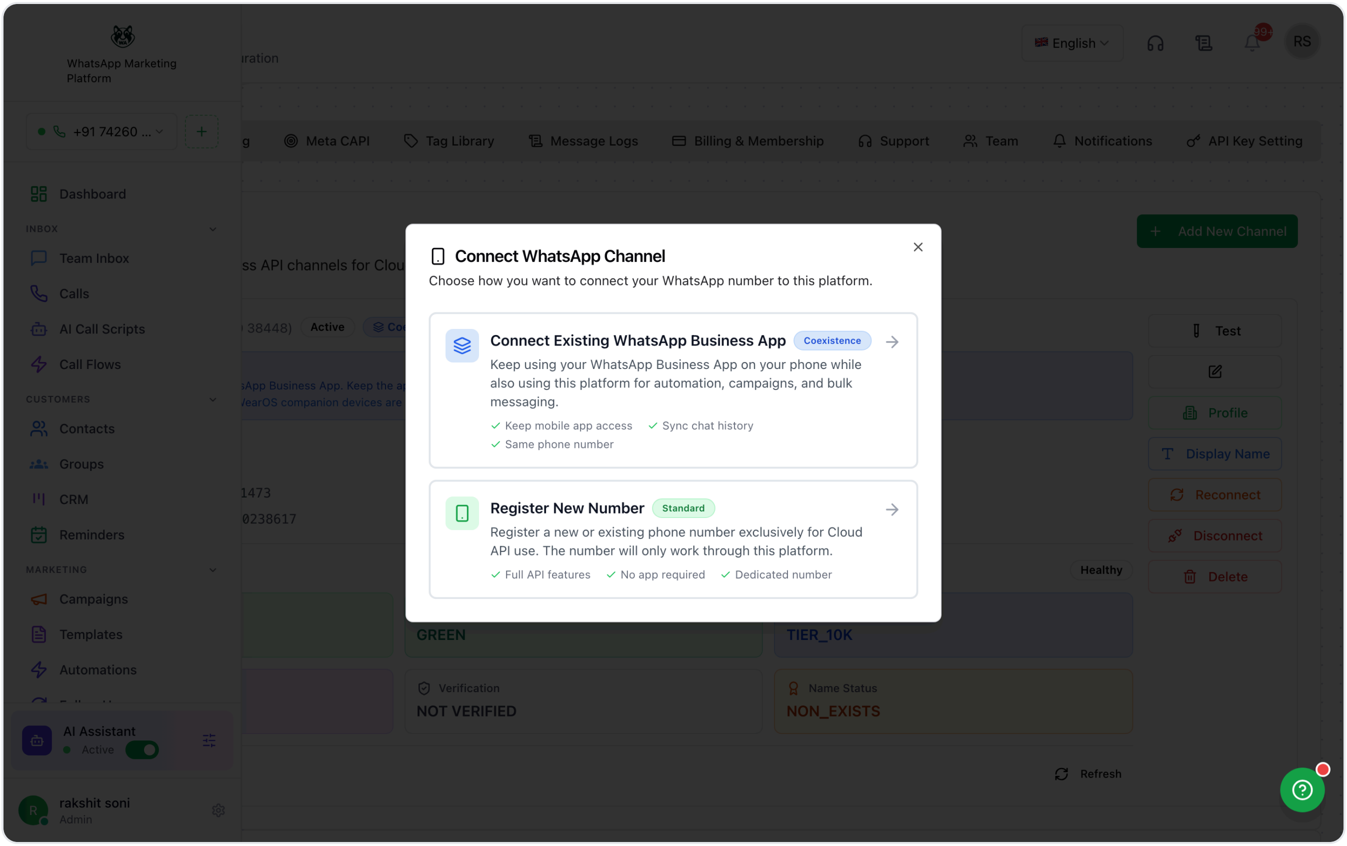
Settings tabs row — Channel Setting tab open

1. **Click Connect WhatsApp.** At the top-right of the Channel Setting tab, click the green **Connect WhatsApp** button. If you already have a channel connected, the same button reads **Add New Channel**.



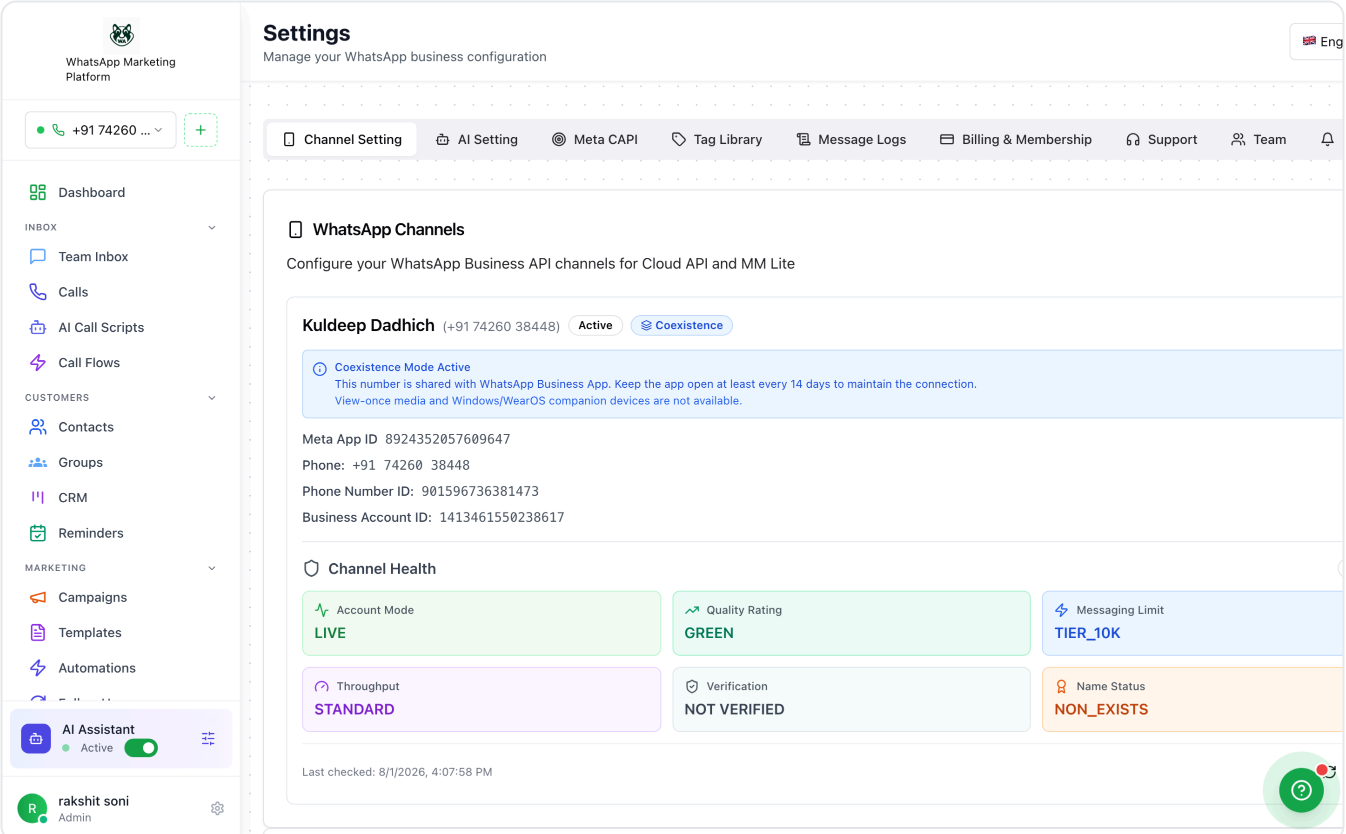
The green Connect WhatsApp / Add New Channel button

1. **Choose one of the two connection options.** A **Connect WhatsApp Channel** dialog opens with exactly two choices: **Connect Existing WhatsApp Business App (Coexistence)** and **Register New Number (Standard)**. Pick Coexistence to keep using WhatsApp on your phone too; pick Register New Number for a fresh, API-only number.



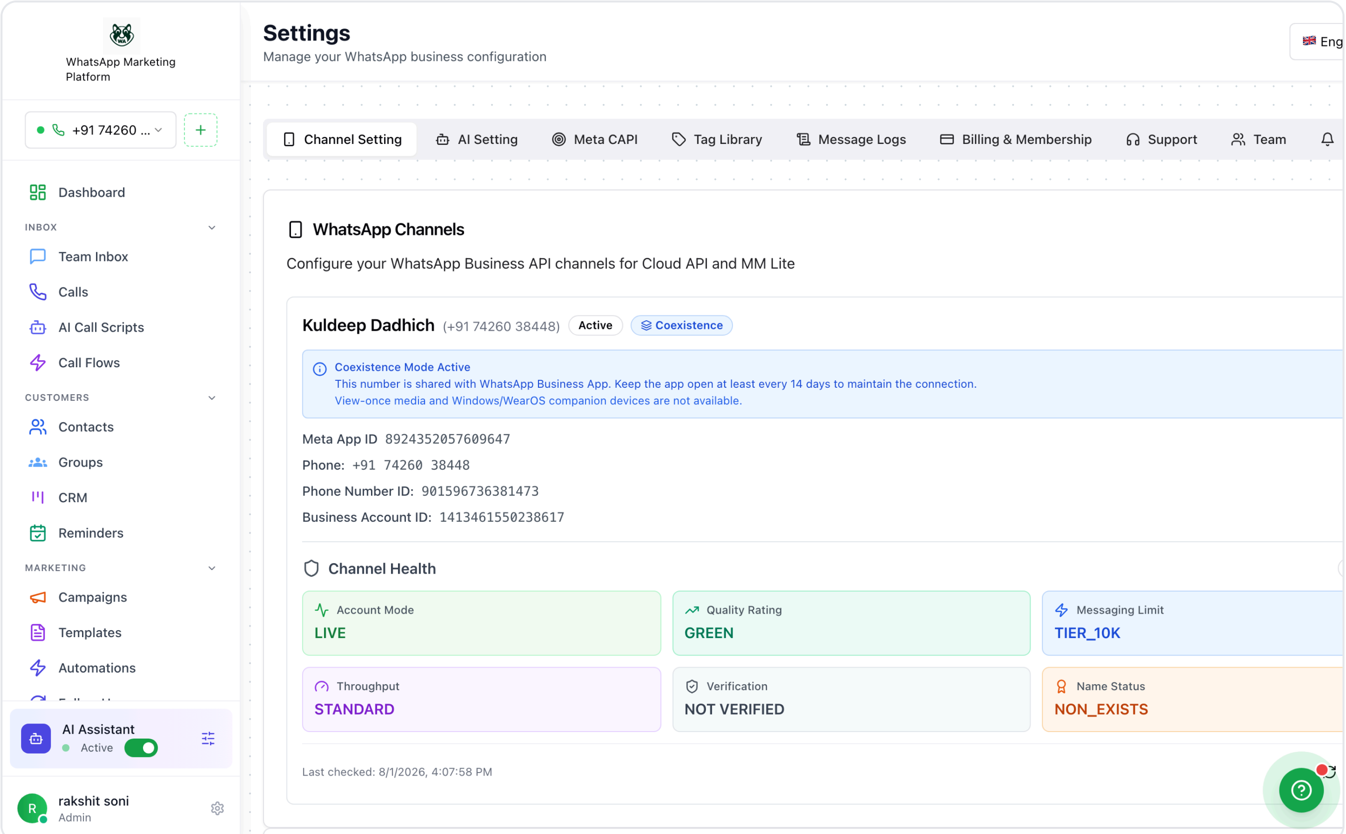
The two connection options — Coexistence and Register New Number

1. **Coexistence: check eligibility, then scan the QR code.** If you chose **Coexistence**, an eligibility checklist appears (Business app v2.24.17+, used 7+ days, supported country, a Meta Business Account). Confirm it, then a Facebook window opens with a **QR code** — open your WhatsApp Business app and scan it to link the number.



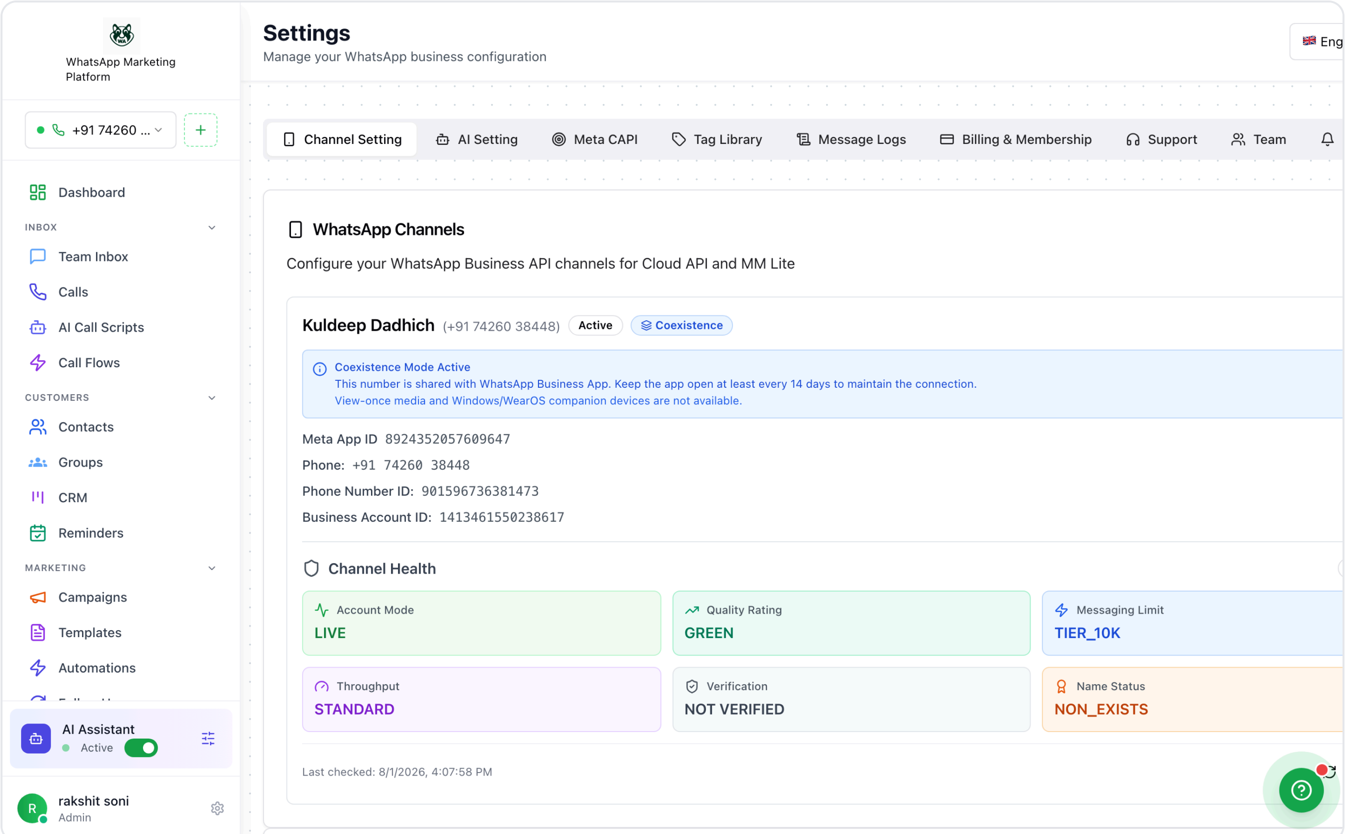
Eligibility checklist followed by the QR code to scan

1. **Register New Number: follow the Facebook window.** If you chose **Register New Number**, a Facebook login window opens and walks you through selecting or creating a phone number that will run exclusively through the Cloud API / panel.



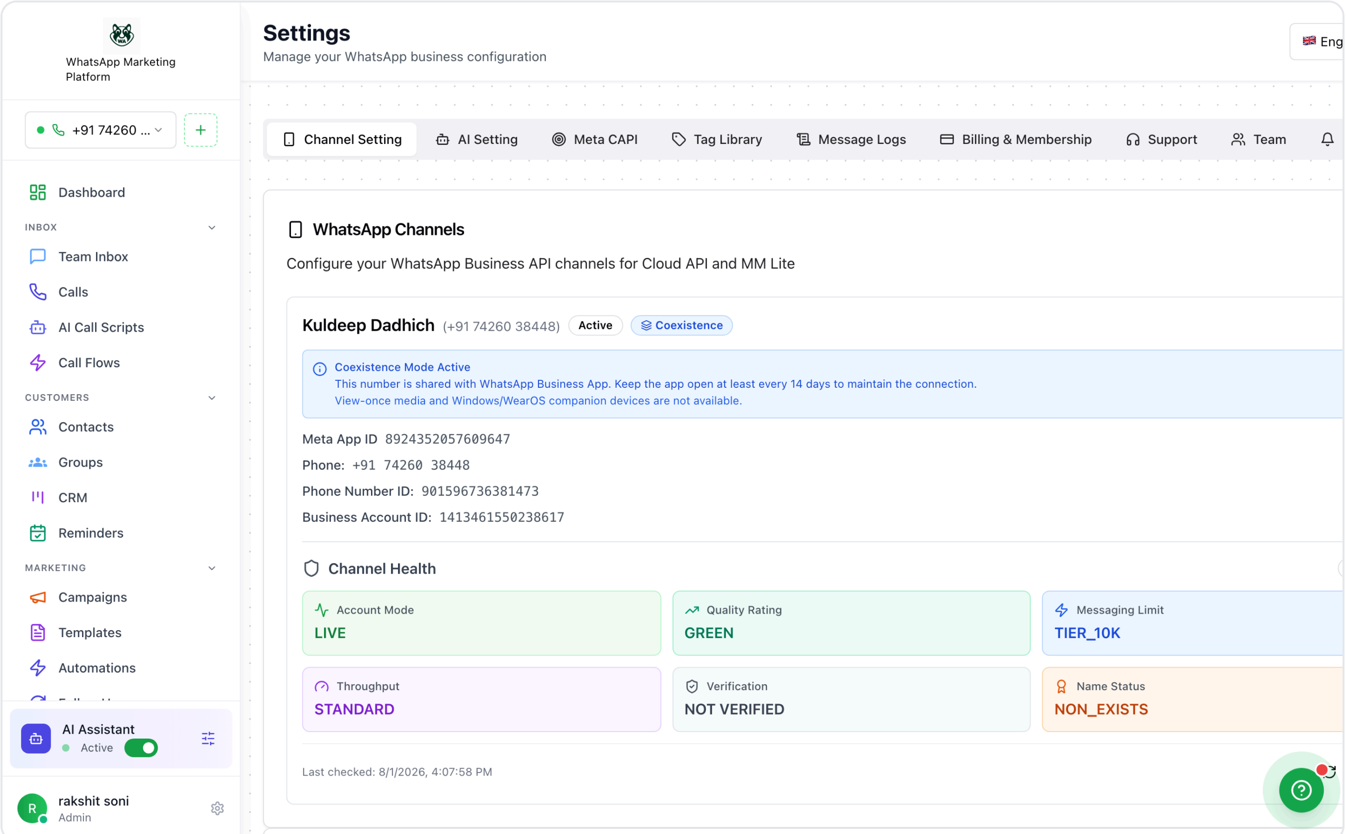
Facebook window guiding new-number registration

1. **Verify the number if asked.** If the number needs verification, a **Phone Verification** dialog asks you to receive a 6-digit code by **SMS** or **Voice Call**. Choose a method, wait for the code, then type it in and confirm.



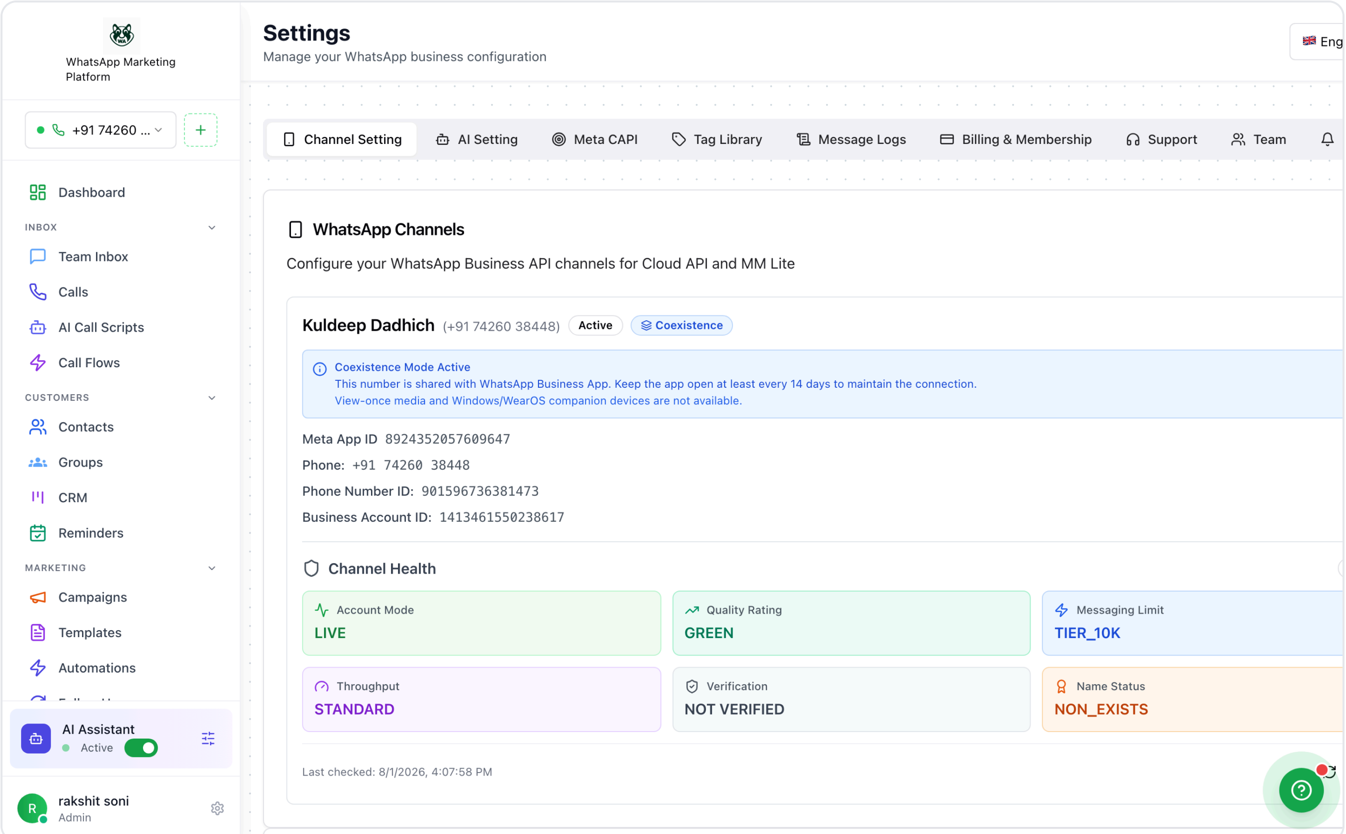
6-digit code verification by SMS or Voice Call

1. **Manual setup (only if embedded signup is off).** If your provider disabled embedded signup, the **Add New WhatsApp Channel** form appears instead. Fill in **Channel Name**, **Phone Number**, **Meta App ID**, **Phone Number ID**, **WhatsApp Business Account ID** and your permanent **Access Token**, then click **Create Channel**.



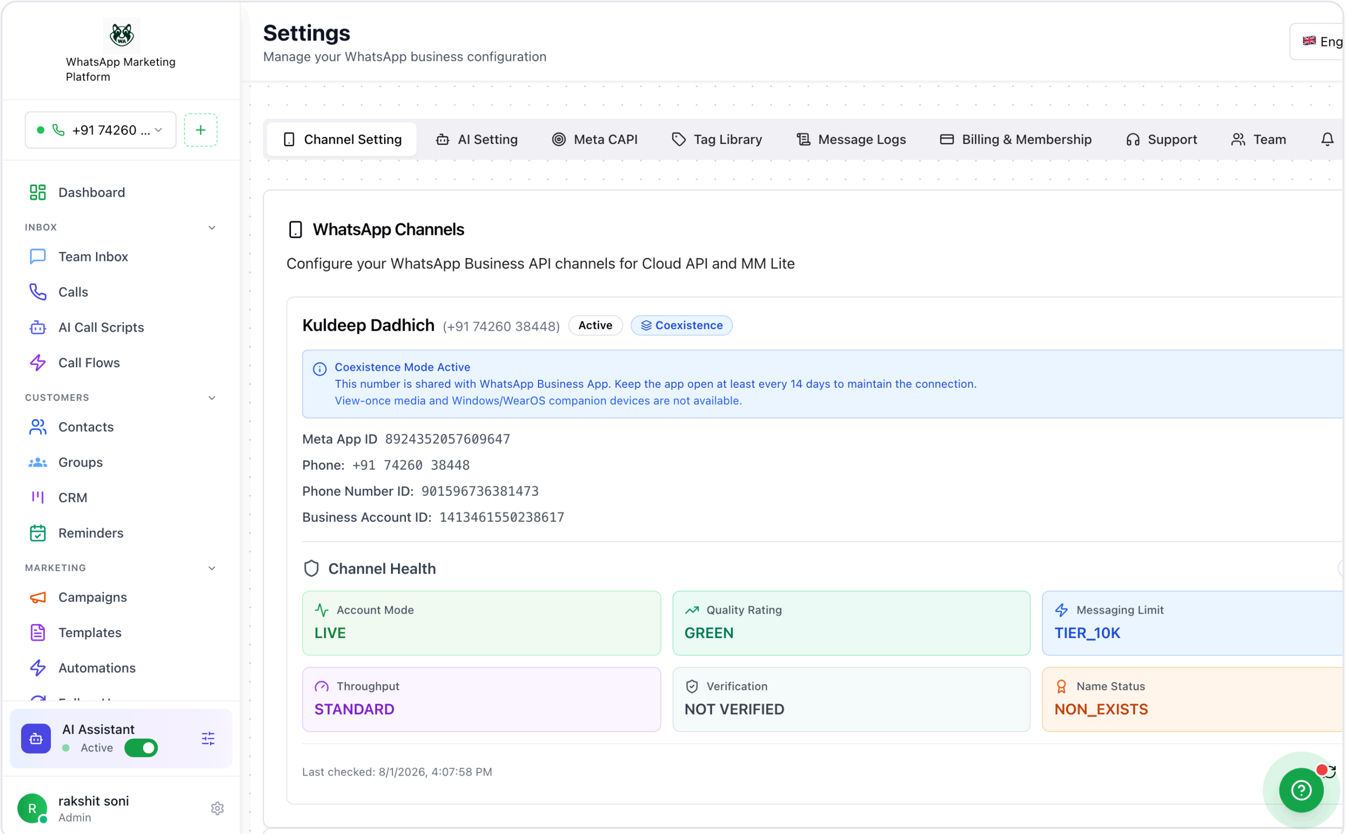
Manual channel form — IDs and Access Token

1. **Review the channel card and its health.** After connecting, a channel card shows **Channel Health** — status, quality rating, messaging limit, throughput and verification. Click **Refresh** on the card to re-check, and use **Test** to confirm it can send.



Channel Health metrics with Refresh and Test actions

1. **Switch between numbers from the header.** If you connect more than one number, use the **channel switcher** in the app header to pick which channel you are working with — the inbox, settings and team are all scoped to it.



Header channel switcher for choosing the active number

Tips

- Start here first — nothing else in the platform (inbox, campaigns, automations) works until a channel is connected and healthy.
- For **Coexistence**, open your WhatsApp Business app at least once every 14 days and don't uninstall it, or the connection breaks.
- Manual channels show an amber prompt to reconnect via embedded signup — do this so your access token refreshes automatically instead of expiring.

FAQ

Q: There are two options when I add a channel — which do I choose?

A: Coexistence keeps your number working on the WhatsApp Business phone app AND on the platform at the same time — pick this for most cases. **Register New Number** sets up a number that works only through the Cloud API / panel — pick this for a fresh, dedicated API number.

Q: What's the difference between Disconnect and Delete?

A: Disconnect deregisters the number from Cloud API and marks it inactive (you can reconnect it later). **Delete** permanently removes the channel and cannot be undone.

Q: I see a "Phone Registration Incomplete" warning.

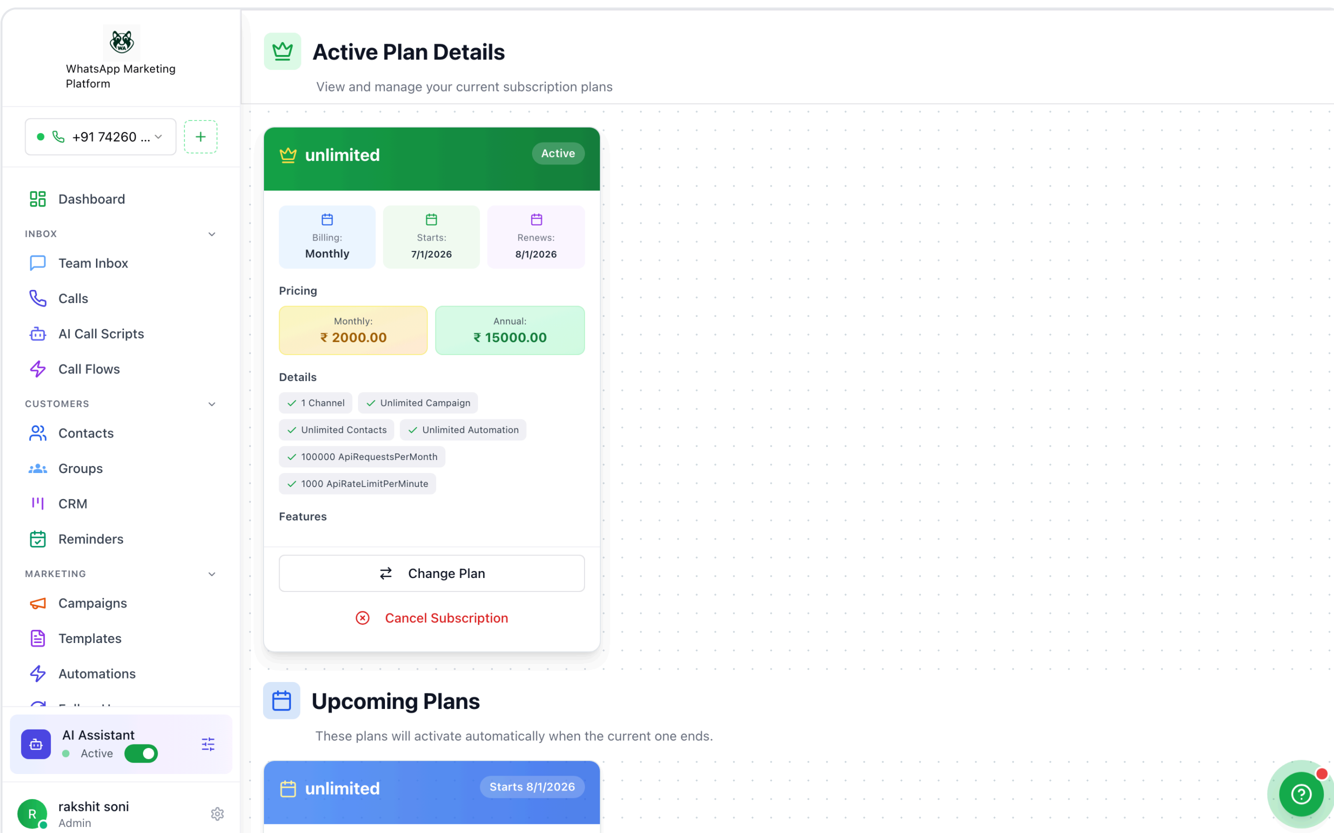
A: The channel exists but isn't registered with Cloud API yet. Click **Register Phone** to retry — you may be asked to verify by OTP.

Choosing and paying for a plan

your account runs on a subscription **plan** that sets what you can do — how many channels, contacts, automations and campaigns you get, plus API limits. You browse and buy plans from **Plans** in the sidebar, and view your active plan under **Settings → Billing & Membership**.

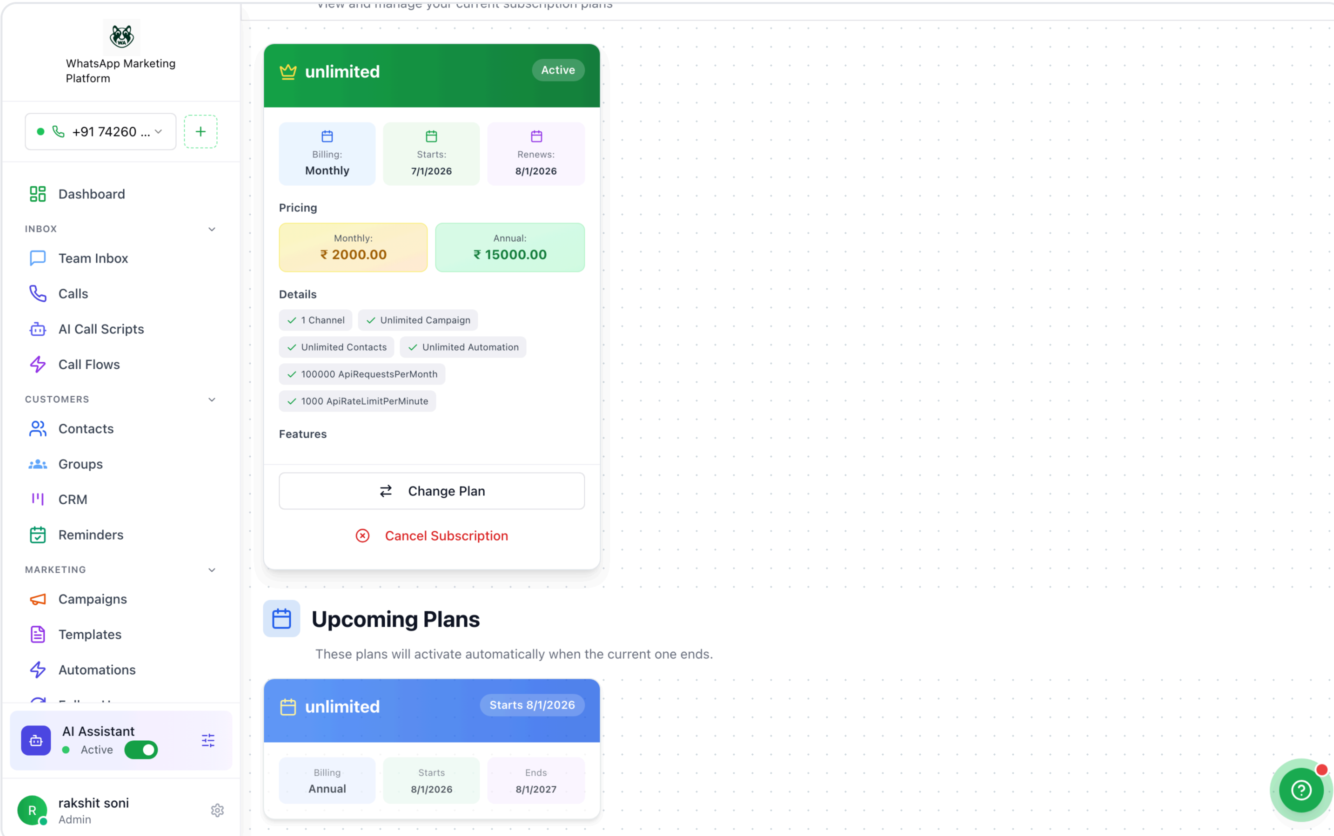
How to use (step by step)

1. **Check your current plan.** Open **Settings → Billing & Membership**. Each active plan card shows the plan name, start date, renewal/expiry date and status. If you have no subscription yet, you'll see an **Upgrade Plan** button here.



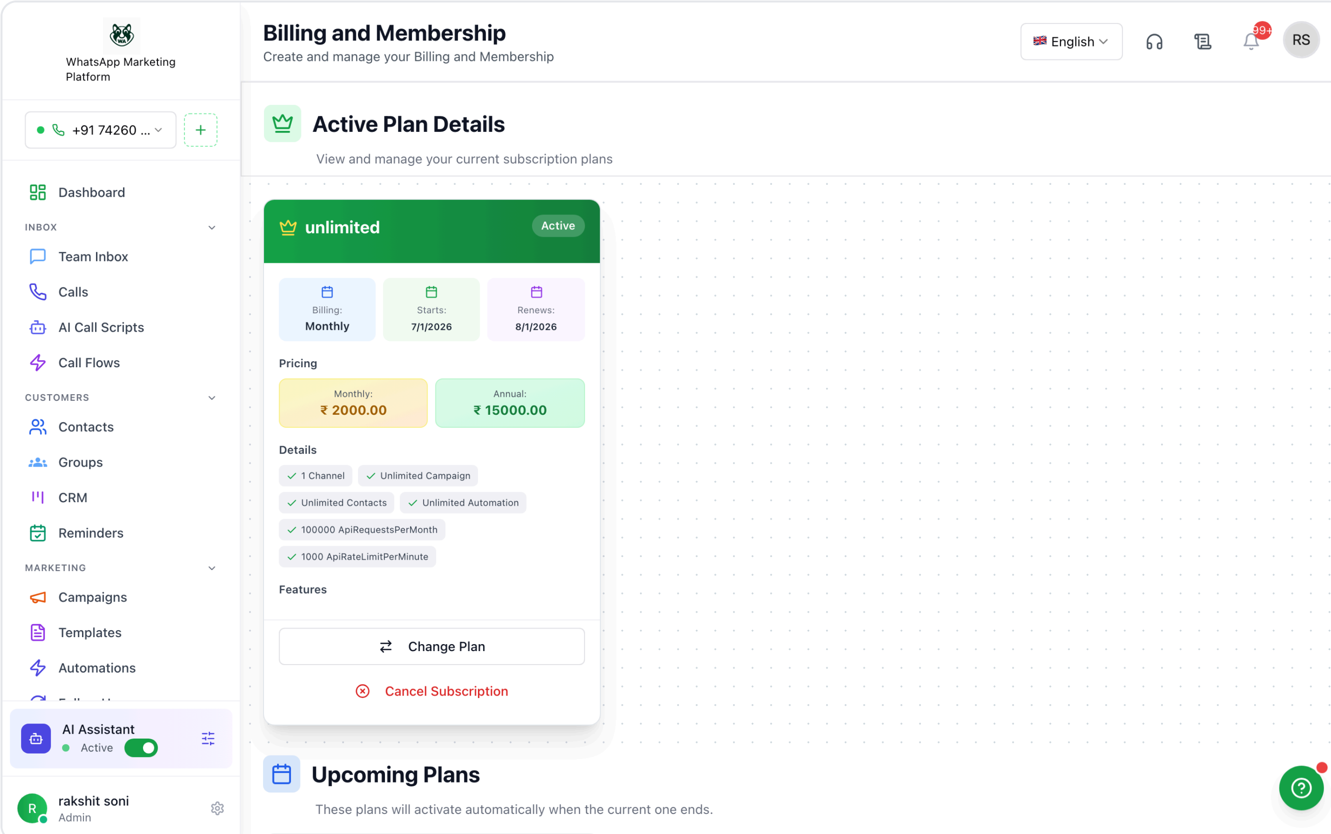
Current subscription card with plan name and renewal date

1. **Open the Plans page.** Click **Plans** in the left sidebar to see every plan available to you, laid out as a row of cards.



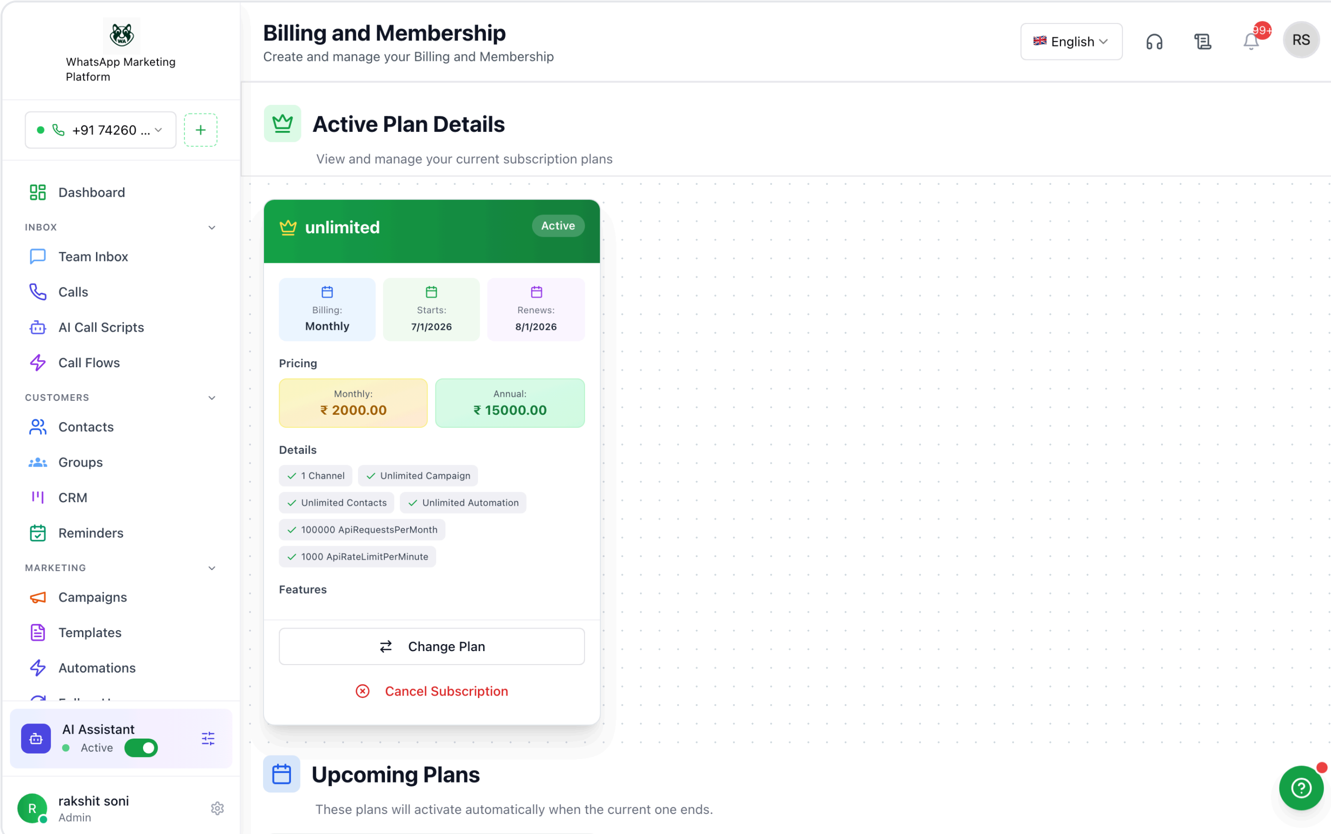
The Plans page listing all available plans

1. **Pick monthly or annual, and your currency.** At the top of the Plans page, use the **Monthly / Annual** toggle (annual usually has a discount) to switch how prices are shown. If a currency selector is offered, choose yours so the prices display in your currency.



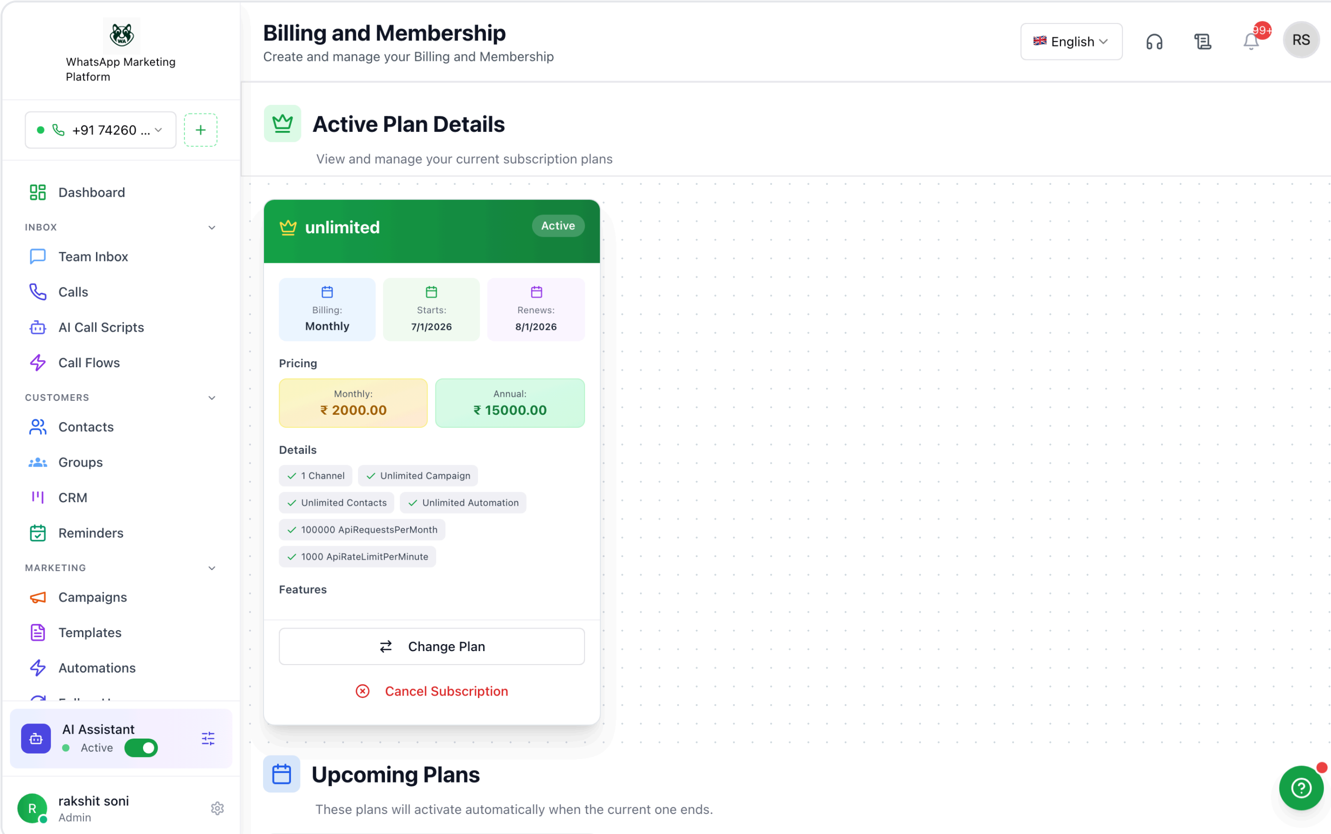
Billing-period toggle and currency selector at the top of Plans

1. **Compare the plan cards.** Each card lists its price and key limits — channels, contacts, automation, campaign and API limits — plus the included features. A **Most Popular** badge highlights the recommended plan.



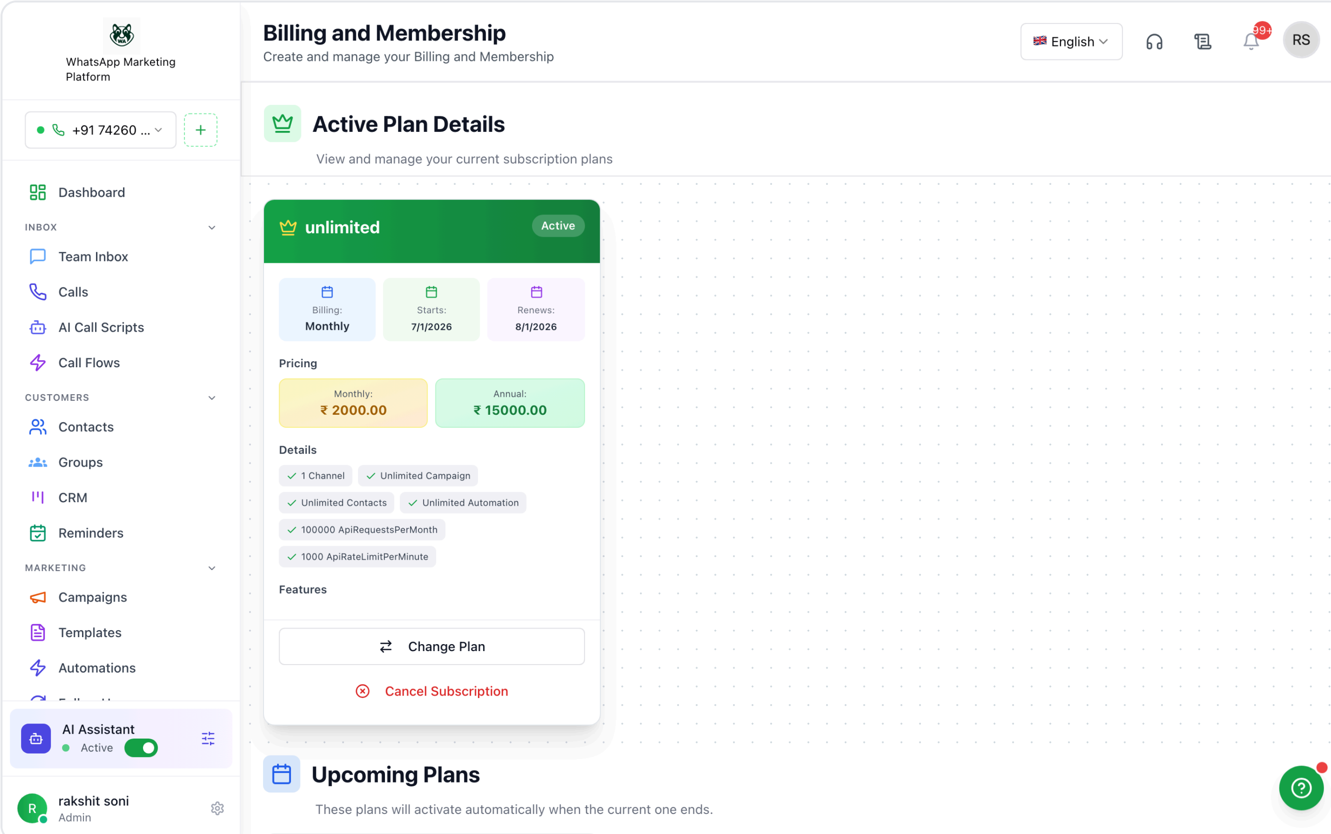
A plan card with price, limits and included features

1. **Click the action button for the plan you want.** The button changes with your situation: **Buy** if you have no plan, **Upgrade** for a higher-priced plan, or **Downgrade** for a cheaper one. A downgrade first asks you to confirm because your features will be reduced.



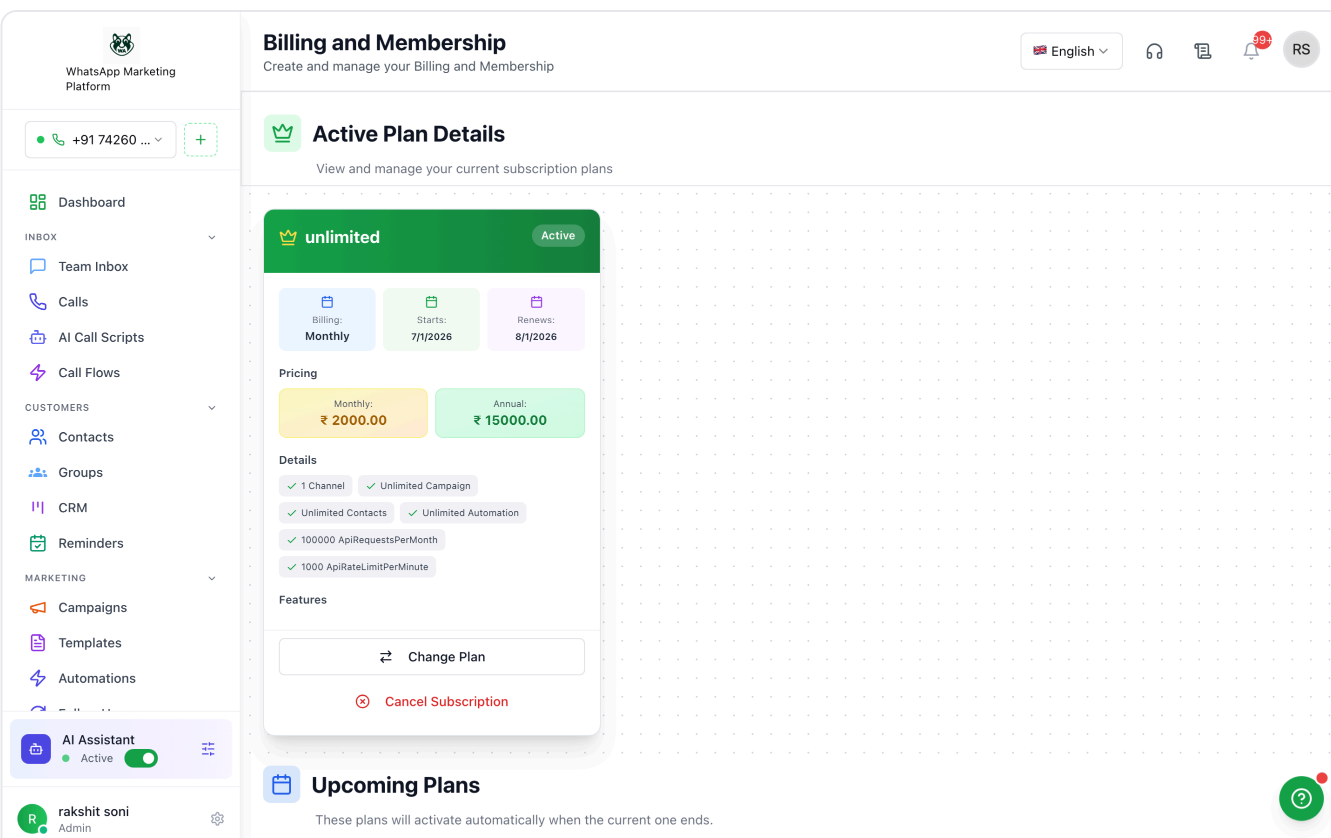
The action button — Buy, Upgrade or Downgrade

1. **Complete payment in the checkout dialog.** A checkout dialog opens to take payment through the configured gateway (Stripe, Razorpay, PayPal and others). Enter your payment details and confirm the purchase.



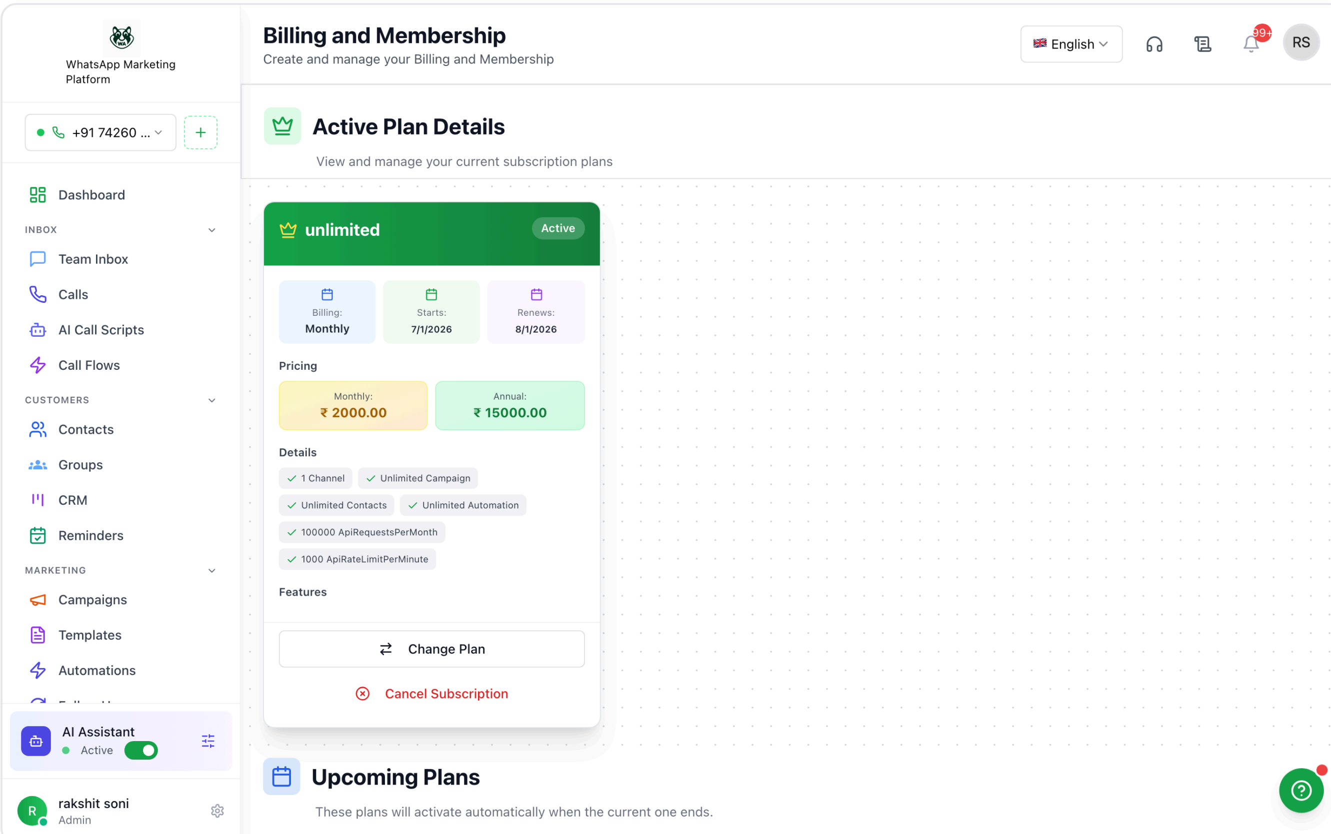
Checkout dialog collecting payment

1. **Confirm the plan is active.** Back on the Plans page, your plan now shows a green **Current Plan** badge. A free plan instead shows **Free Plan (Active)** or **Auto-Assigned**.



The purchased plan showing the Current Plan badge

1. **Manage or cancel from Billing & Membership.** To change or stop a subscription, return to **Settings → Billing & Membership** and use the controls on the plan card. **Cancel** usually takes effect at the end of the paid period, not immediately.



Managing or cancelling the active subscription

Tips

- **Plan limits are enforced** — if you hit a cap on channels, contacts, automations or campaigns, upgrade to raise it. API limits cap requests per month and per minute.
- Subscriptions can **stack**: buying a new plan while one is active queues it to start when the current one ends (mobile-recharge style).
- New admin accounts may be **auto-assigned a Free plan** that expires after a trial window — buy a paid plan before it lapses to avoid losing access.

FAQ

Q: Will upgrading charge me immediately?

A: Yes — upgrades and downgrades go through the checkout dialog and your payment provider right away.

Q: What happens when my plan expires?

A: Access is reduced to your plan caps (or a free/trial tier). Renew or upgrade to restore full limits.

Q: Annual vs monthly — what's the difference?

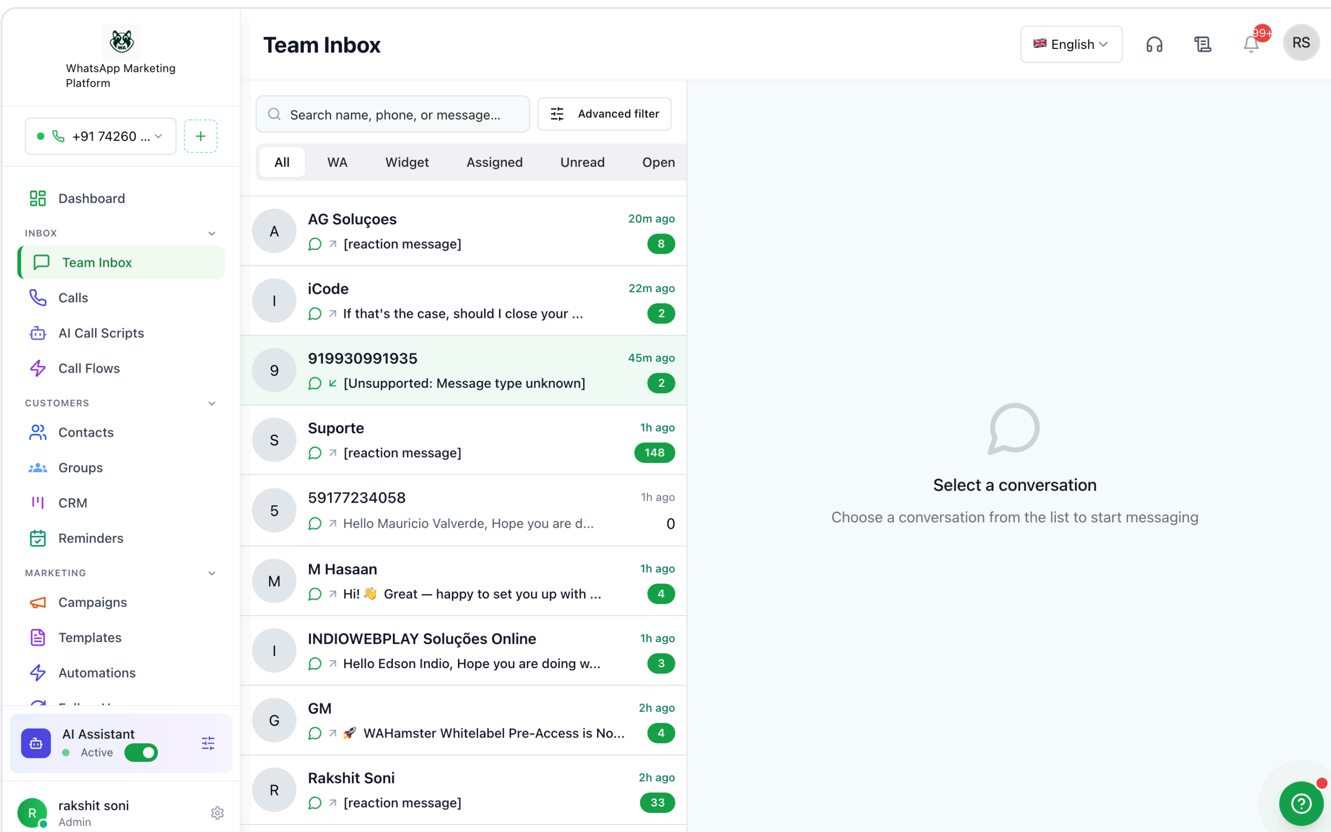
A: Annual is billed once per year, usually at a discount; monthly bills every month. Toggle between them on the Plans page before buying.

Team Inbox and its tools

The Team Inbox is your shared, real-time WhatsApp conversation hub in the platform: every chat with a contact lands here so you and your team can reply, send media, send approved templates, take notes, and hand chats to the right agent from one screen. It lives in the left sidebar under **Team Inbox** (route `/inbox`) and always works against your currently active channel.

How to use (step by step)

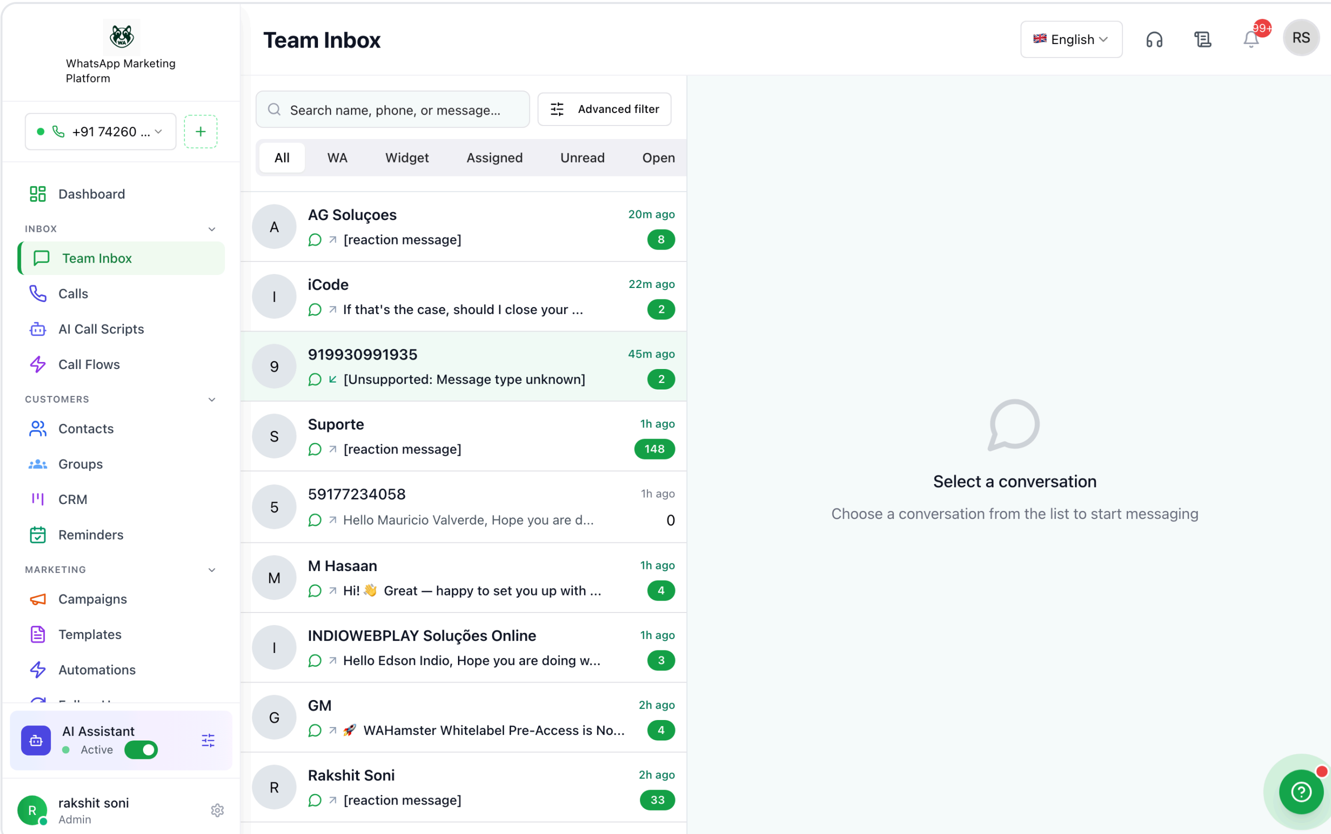
1. **Open the Team Inbox.** In the left sidebar, click **Team Inbox**. The screen splits into two panels: the conversation list on the left and the open chat on the right. If you see a "No Active Channel" message, pick a WhatsApp number in the channel switcher at the top first.



Left sidebar Team Inbox item highlighted, two-panel inbox layout on the right

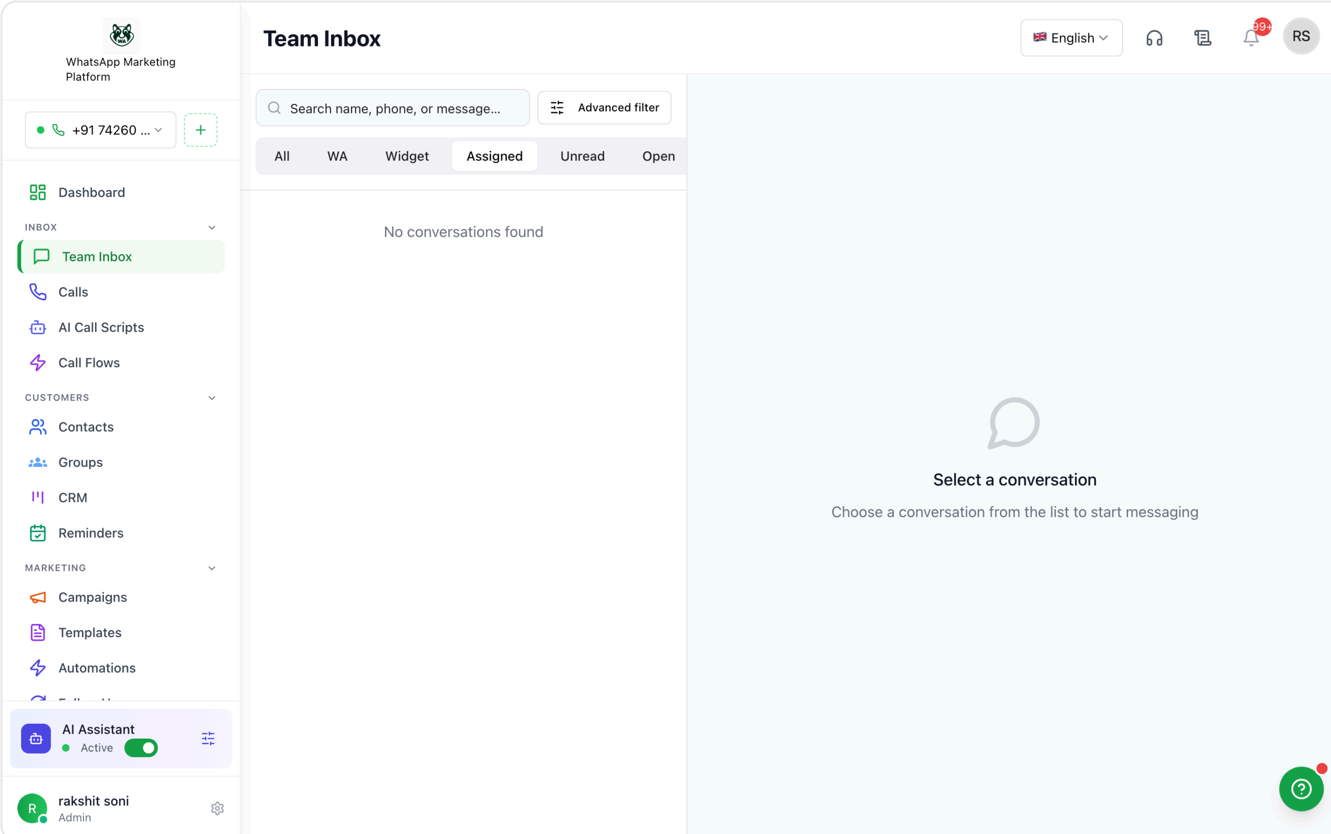
1. **Scan the conversation list.** The left panel lists every chat with the newest activity on top. Each row shows the contact's avatar initial, name, a snippet of the last message,

the time, and a coloured unread-count badge when there are new messages. Scroll to the bottom to auto-load older chats.



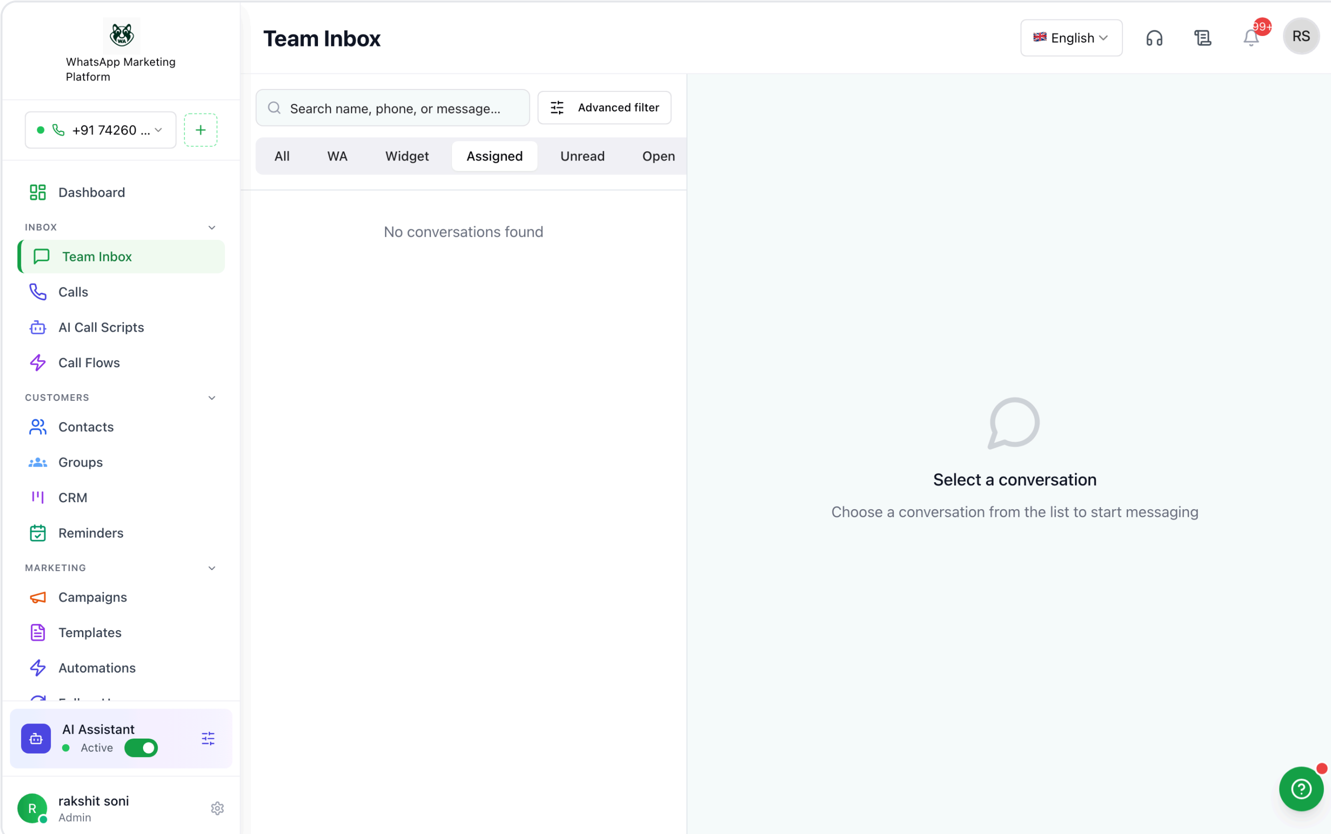
Left panel list of conversations, newest on top, unread count badges on some rows

1. **Search and filter the list.** At the top of the list is the **Search** box (magnifier icon) — it matches by name, phone, and message text, so you can find a chat by something that was said in it. To its right is the **advanced filter** icon that opens a popover to filter by Groups, CRM stage, or Tags. Below the search are the filter tabs: **All**, **WhatsApp**, **Widget**, **Assigned**, **Unread**, **Open**, and **Resolved**.



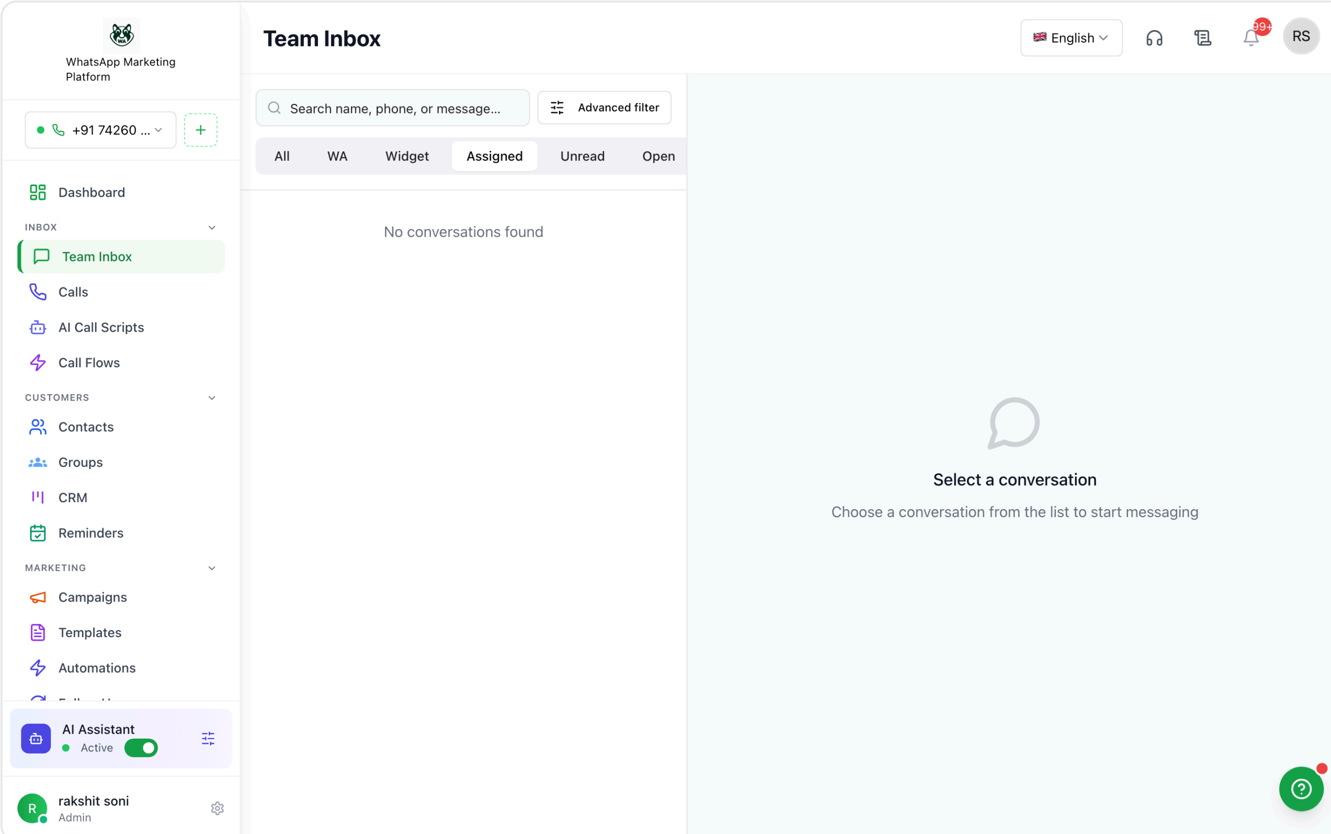
Search field at top, advanced-filter icon beside it, tab row: All, WhatsApp, Widget, Assigned, Unread, Open, Resolved

1. **Open and read a chat.** Click any row to load the thread on the right. The chat header (top) shows the contact's avatar, their **name** with a status badge (**Open** or **Resolved**), and their phone number beneath. Incoming messages sit on the left, your replies on the right, with delivery and read ticks; a bouncing-dots bubble appears when the contact is typing. Opening a chat marks it read.



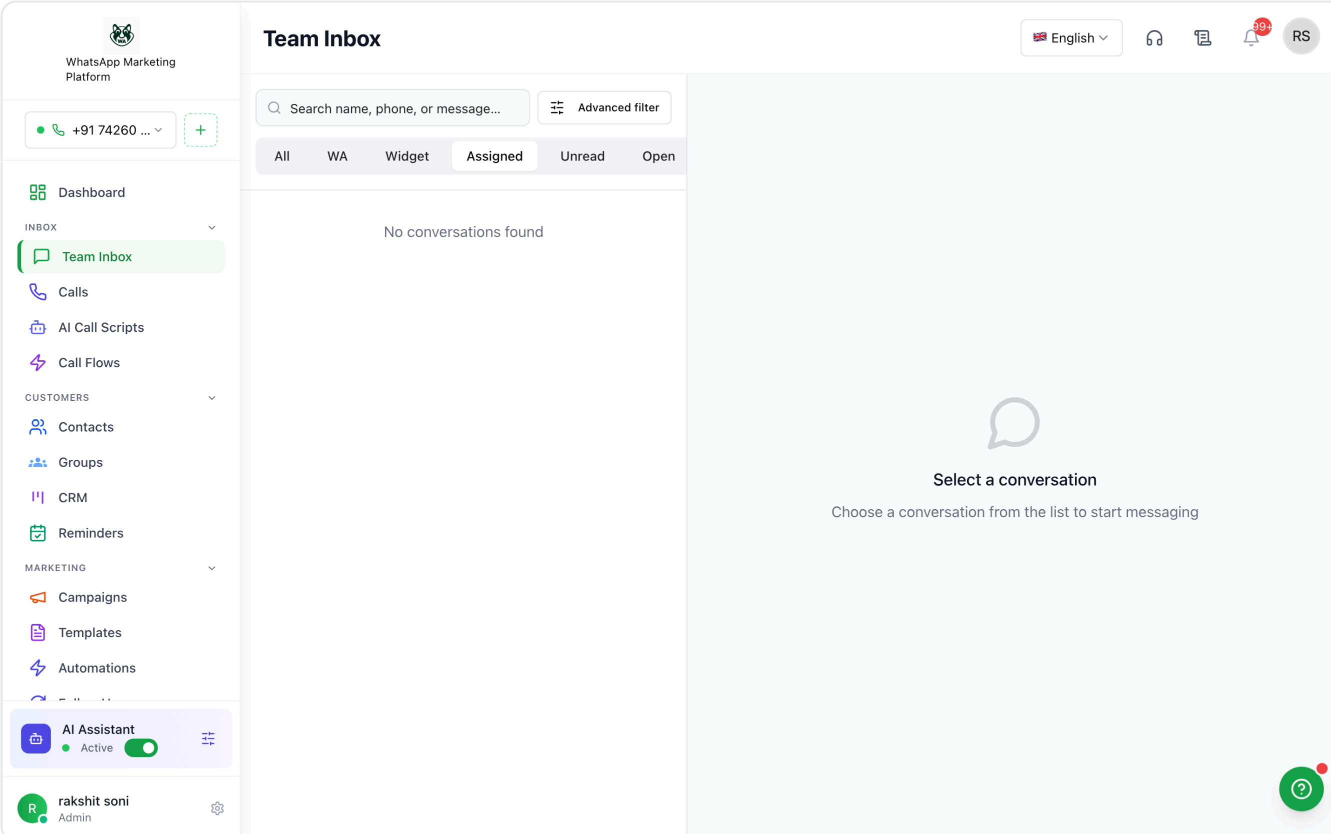
Chat header with avatar, contact name, Open status badge and phone; message bubbles below

1. **Type and send a message.** At the bottom is the composer. Type in the message box, then press **Enter** to send (Shift+Enter makes a new line) or click the green **Send** button (paper-plane icon) on the right. The small formatting toolbar above the box adds **bold**, *italic*, strikethrough, lists, inline code, and quote styling to your text.



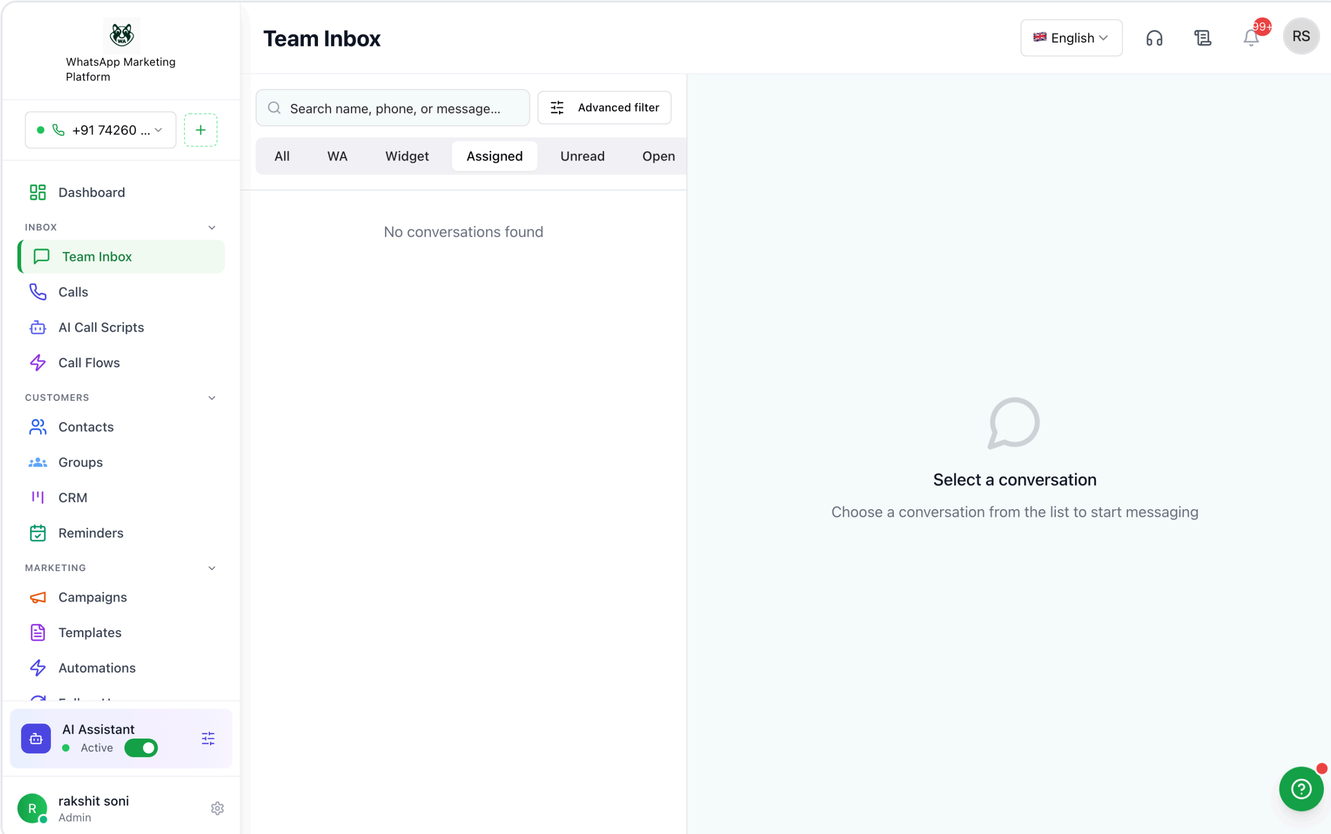
Message box with typed text, formatting toolbar above it, green paper-plane Send button on the right

1. **Attach media or send an approved template.** Click the **paperclip** icon (left of the message box) to pick an image, video, audio, or document, add an optional caption, and send. To send a pre-approved **template** (required once the 24-hour reply window has closed), open the template picker, search or filter by category, choose a template, fill any variables, and click **Send Template**.



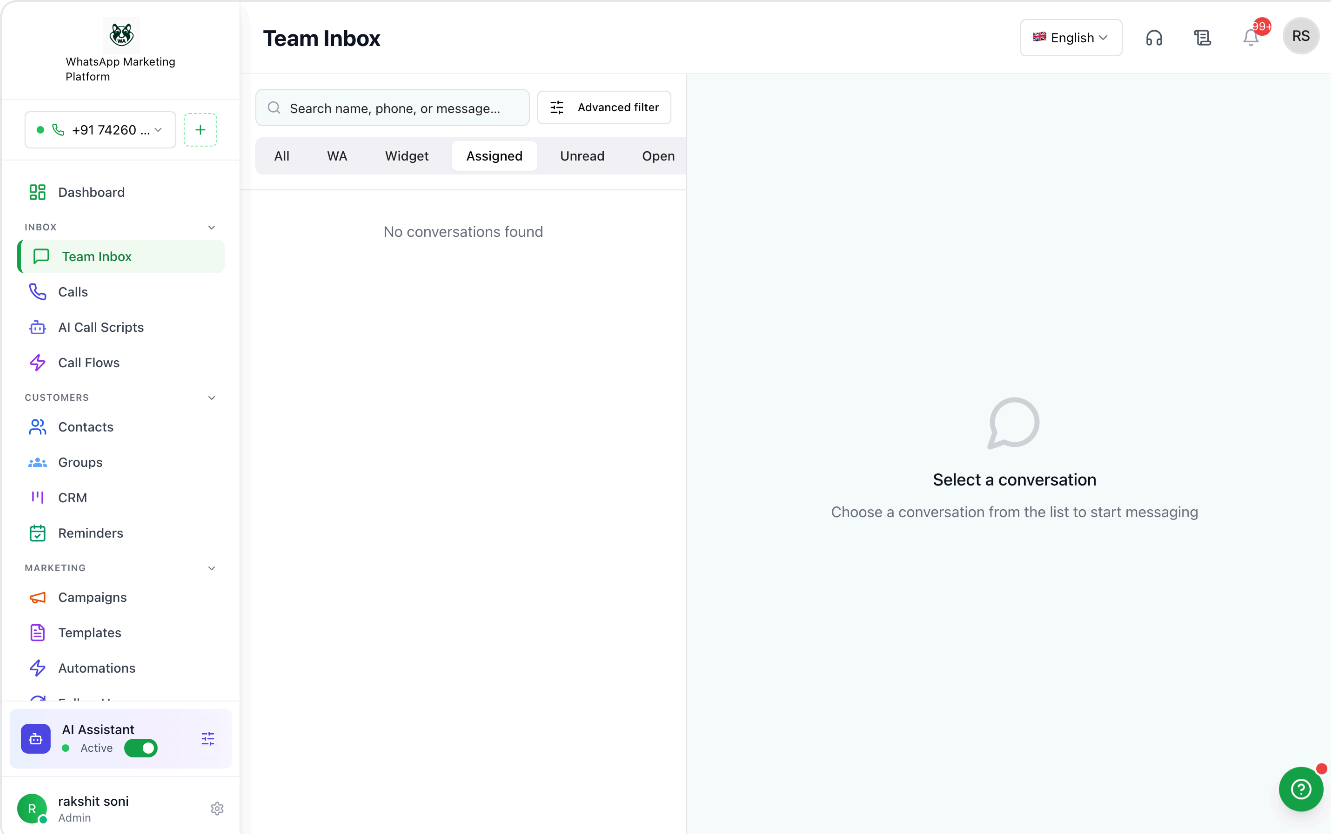
Paperclip attach icon beside the composer and the template picker dialog with a variable form and Send Template button

1. **Use the AI reply toolbar.** Just above the message box is the AI bar. Click the orange **Suggest** button to draft a reply from the conversation, or **Spelling**, **Translate**, **Summarize**, **Enlarge**, **Friendly**, or **Formal** to rewrite what you have typed. The flag dropdown sets the language used for Suggest and Translate. Each tool has a shortcut (Ctrl or Alt + 1–7).



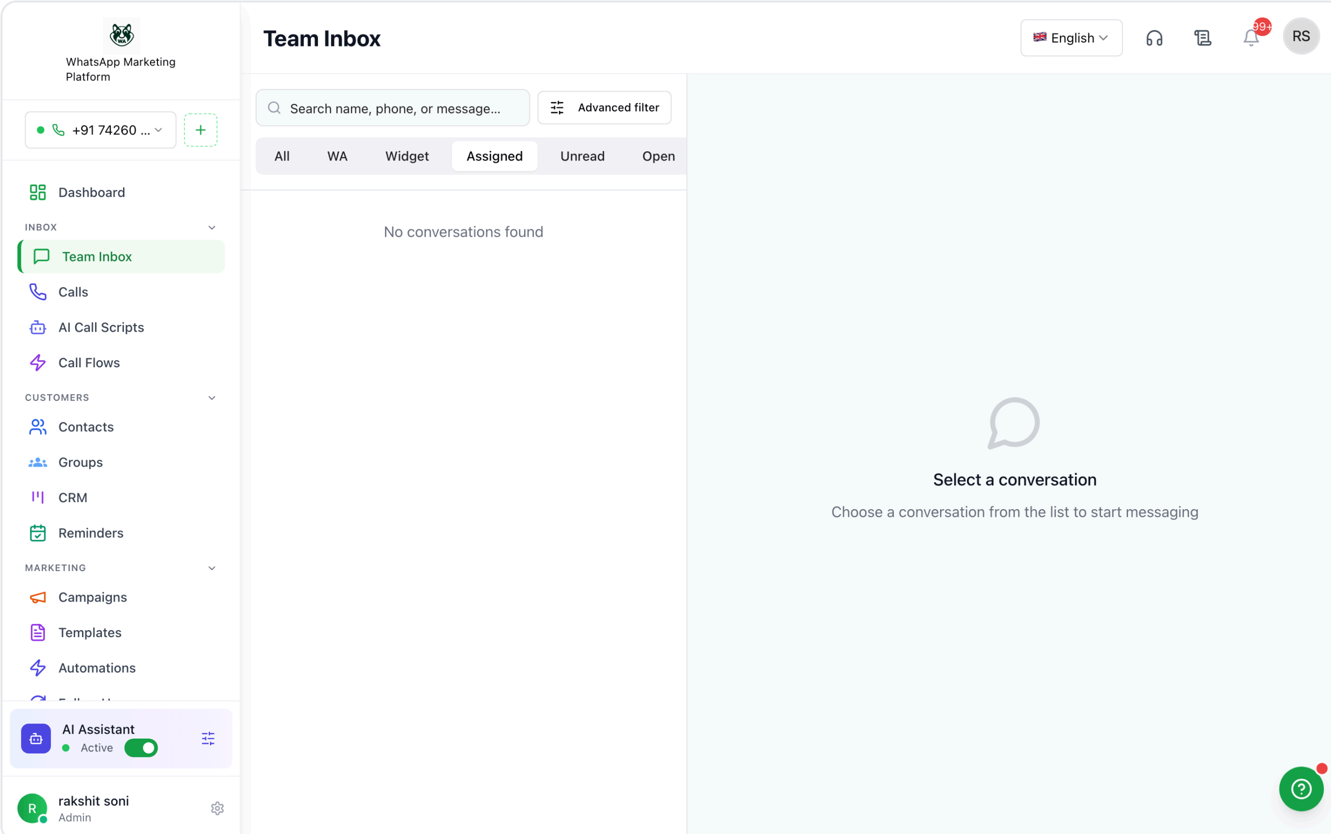
AI bar with orange Suggest button, then Spelling, Translate, language dropdown, Summarize, Enlarge, Friendly, Formal

1. **Send a Quick Reply.** Below the composer, saved canned replies appear as clickable chips. Click a chip to send it instantly. Click the **gear** icon on that bar (or the **MessageSquare** icon in the chat header) to open the manager where you create and edit replies; a reply can also add the contact to a Group or CRM stage when it is sent.



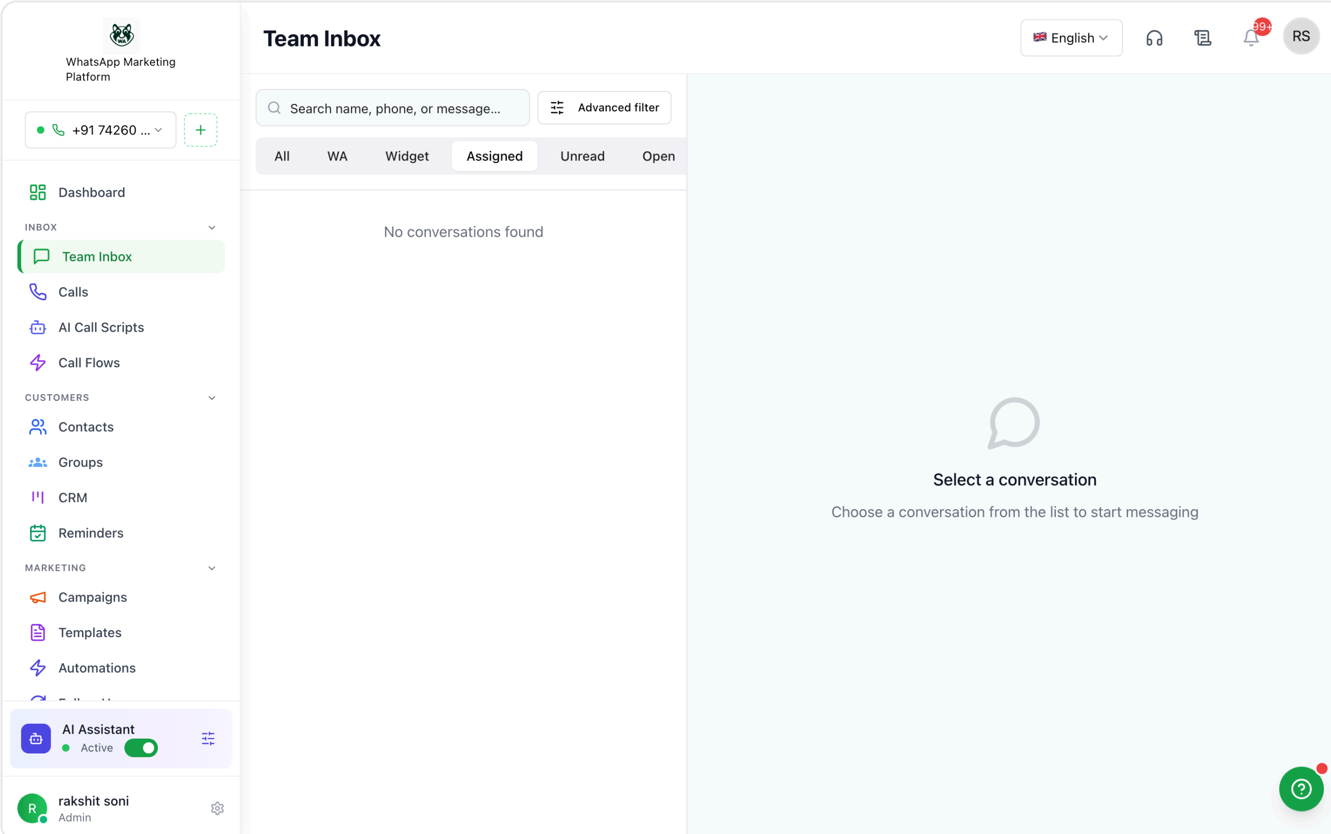
Row of quick-reply chips below the composer with a gear icon to manage them

1. **Assign the chat to an agent.** In the chat header (top-right) click the **Assign** button (person-plus icon). The dropdown lists your team members — pick one to hand the conversation over, or choose **Unassign** to release it. When someone is assigned the button label changes to **Reassign** with their name.



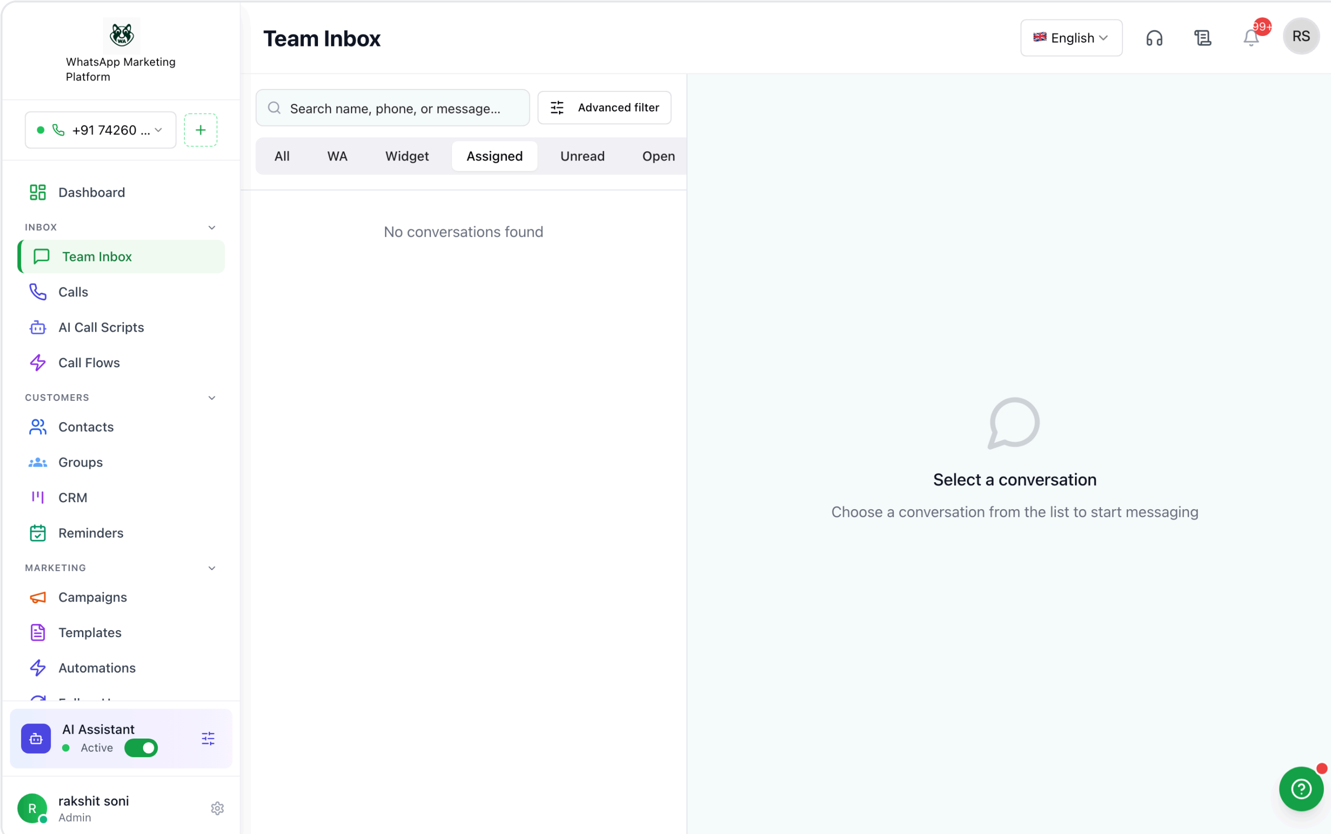
Assign button open showing Assign to team member list and Unassign option

1. **Add Quick Notes.** In the chat header click the **StickyNote** icon to open the notes panel on the right. Type private, internal notes about this contact — they are visible to your team but never sent to the customer.



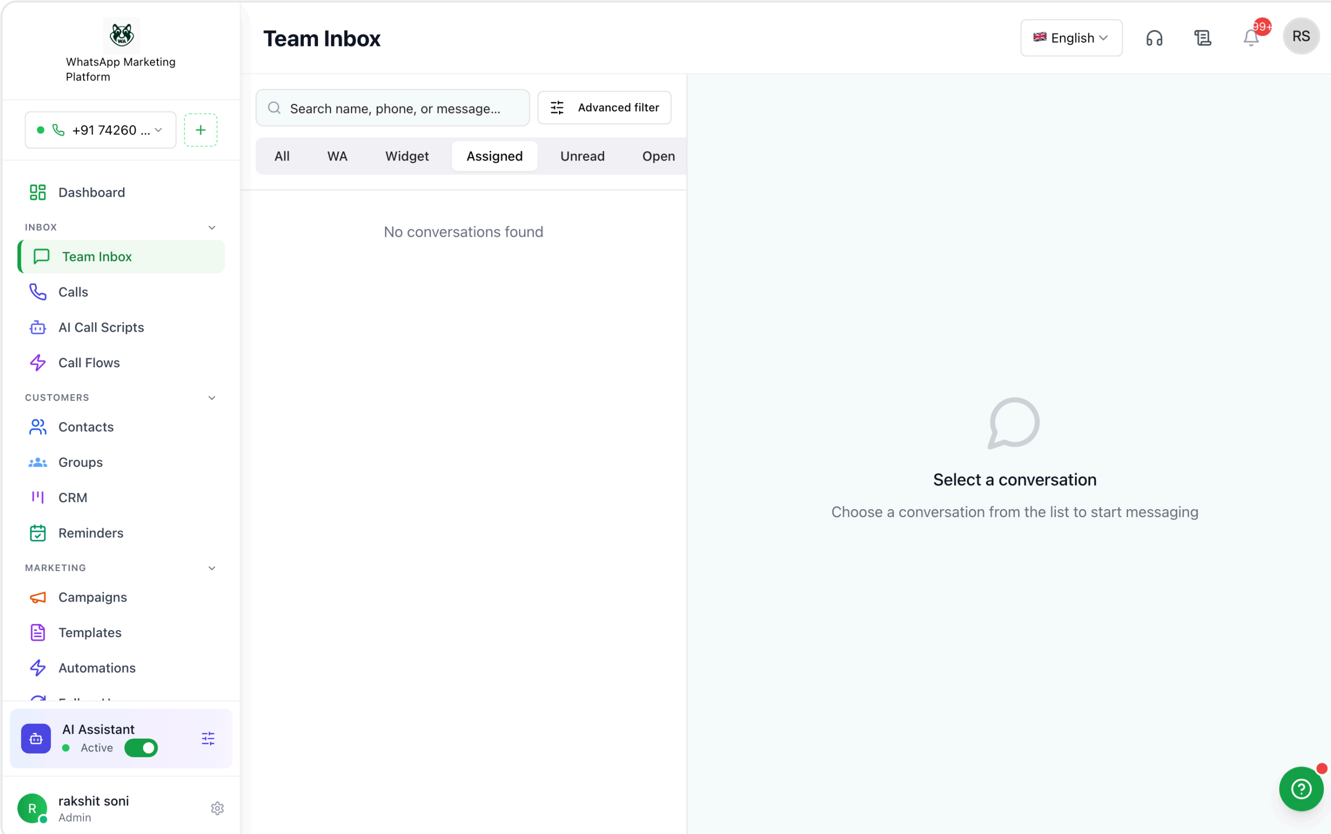
StickyNote header icon and the Quick Notes side panel open on the right with a note editor

1. **Send an Automation to this contact.** In the chat header click the **Zap** icon to open the Send Automation panel. Pick an active automation flow and confirm — it runs for this one contact, with a short cancel window before it starts.



Zap header icon and the Send Automation panel listing active flows to run for this contact

1. **Update CRM stage and Groups.** In the chat header, click the **CRM** icon to tick the pipeline stages this contact belongs to, or the **Groups** icon to add or remove the contact from groups. The ⋮ (more) menu on the far right holds status and chat actions: **Mark as Open**, **Mark as Resolved**, **View Contact**, **Archive Chat**, **Block Contact**, and **Delete Chat**.



CRM stage checklist dropdown and Groups dropdown open from the chat header, with the more-options menu beside them

Tips

- **Search finds spoken words, not just names.** Because the search box also scans message text, you can locate a chat by a keyword the customer mentioned.
- The **advanced filter** (icon next to search) stacks with the tabs and the search — use it to narrow a busy inbox to one Group, CRM stage, or Tag.
- The AI bar only drafts text for you to review; it does not send anything on its own unless AI auto-reply is separately enabled for the channel.
- After the 24-hour window closes you can no longer send free text — switch to an approved template from the template picker.

FAQ

Q: Why can't I send a plain text message?

A: WhatsApp only allows free-form text within 24 hours of the contact's last message. After that, use the template picker (paperclip area) to send an approved template instead.

Q: A message shows "failed" — what should I do?

A: Read the error toast. Billing or eligibility errors point to a payment issue in Meta Business Manager; "not registered" means the number is not on WhatsApp.

Q: How do I stop the AI and take over a chat myself?

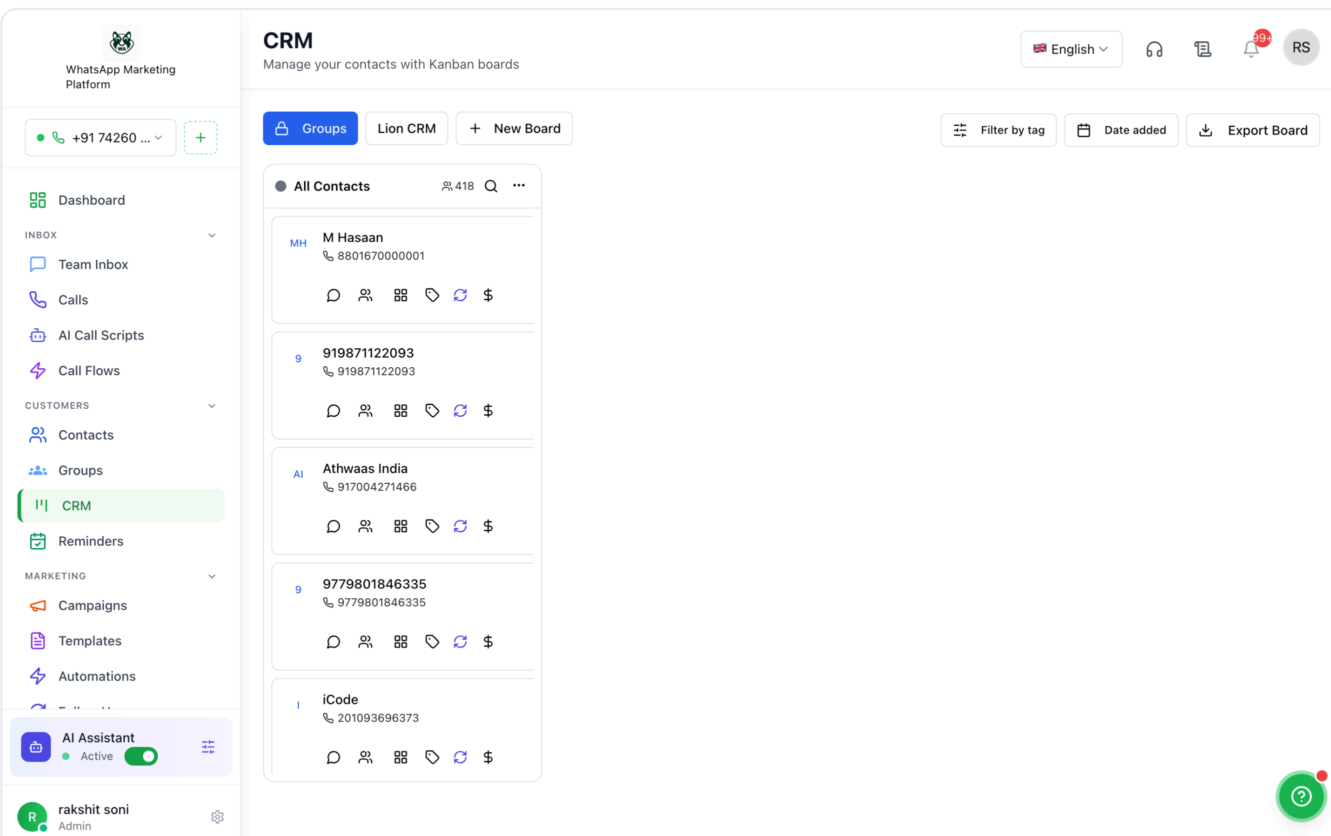
A: Open the **Assign** dropdown in the chat header and assign the conversation to yourself or a teammate. Chats also auto-escalate to a human after repeated AI failures or when the contact uses a trigger phrase like "talk to human".

CRM pipeline

The CRM is a visual Kanban board for moving contacts through a sales pipeline in the platform. A **board** holds several **stages** (columns), and each contact sits in a stage as a **card** you drag along as the deal progresses. It lives in the left sidebar under **CRM** (in the Audience group), on the `/crm` page.

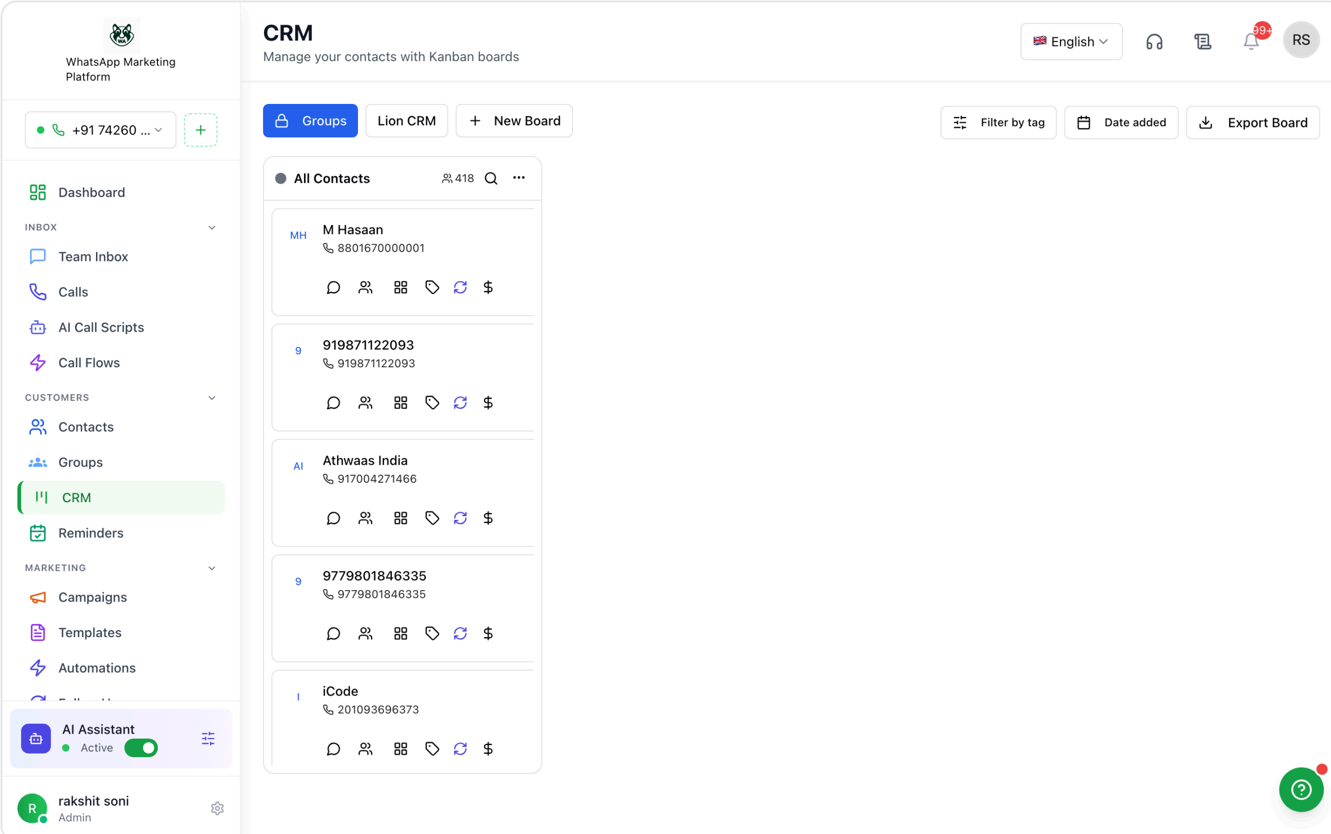
How to use (step by step)

1. **Open the CRM board.** In the left sidebar, under the **Audience** group, click **CRM**. The board fills the screen: a **board selector** dropdown, a **Tag** filter, a **Date-range** filter and an **Export Board** button sit across the top, with stage columns and their cards below. You must have an active channel selected first.



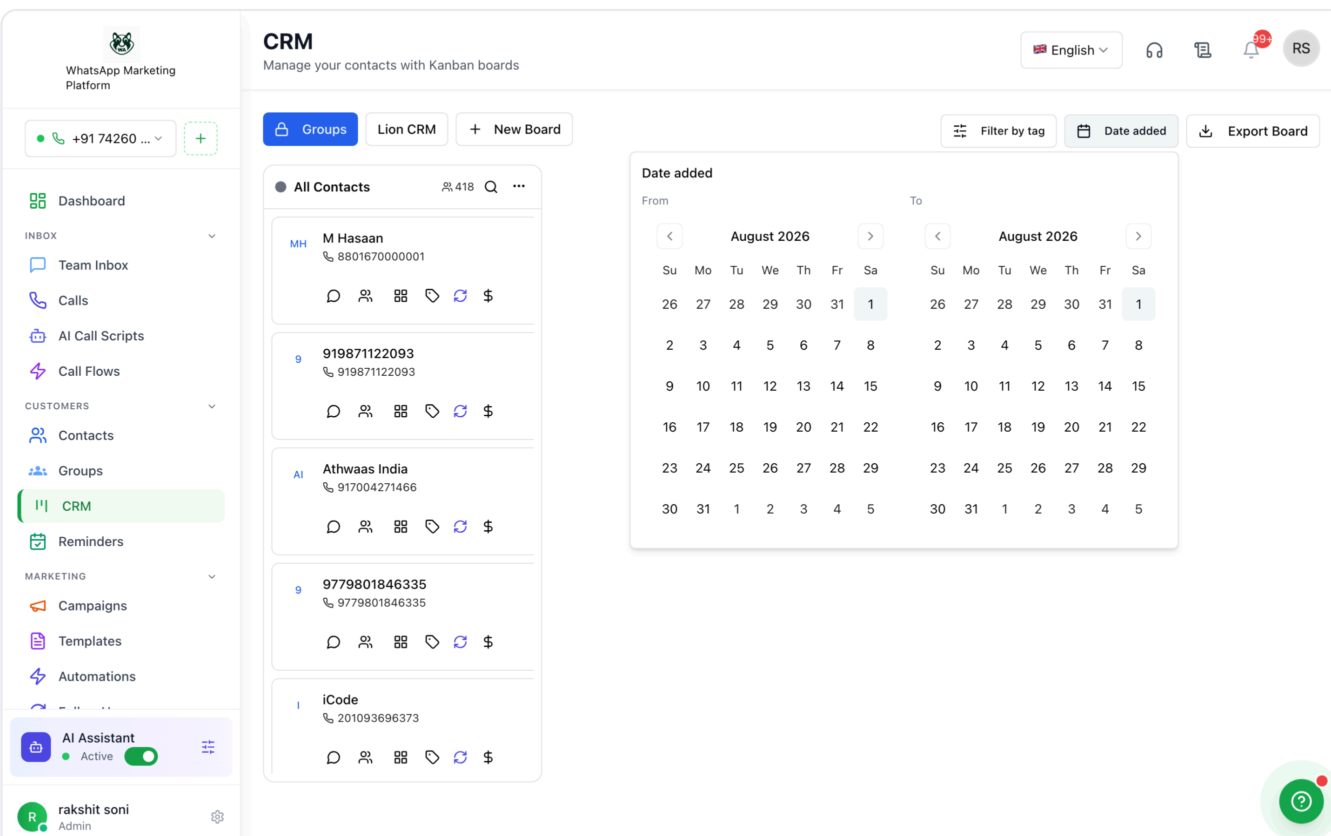
The CRM Kanban page — board selector, Tag and Date filters, Export Board, and stage columns

1. **Pick or create a board.** Click the **board selector** dropdown at the top-left. Switch to an existing board, or choose **+ Create** to make a new one. The same dropdown lets you edit or delete the current board.



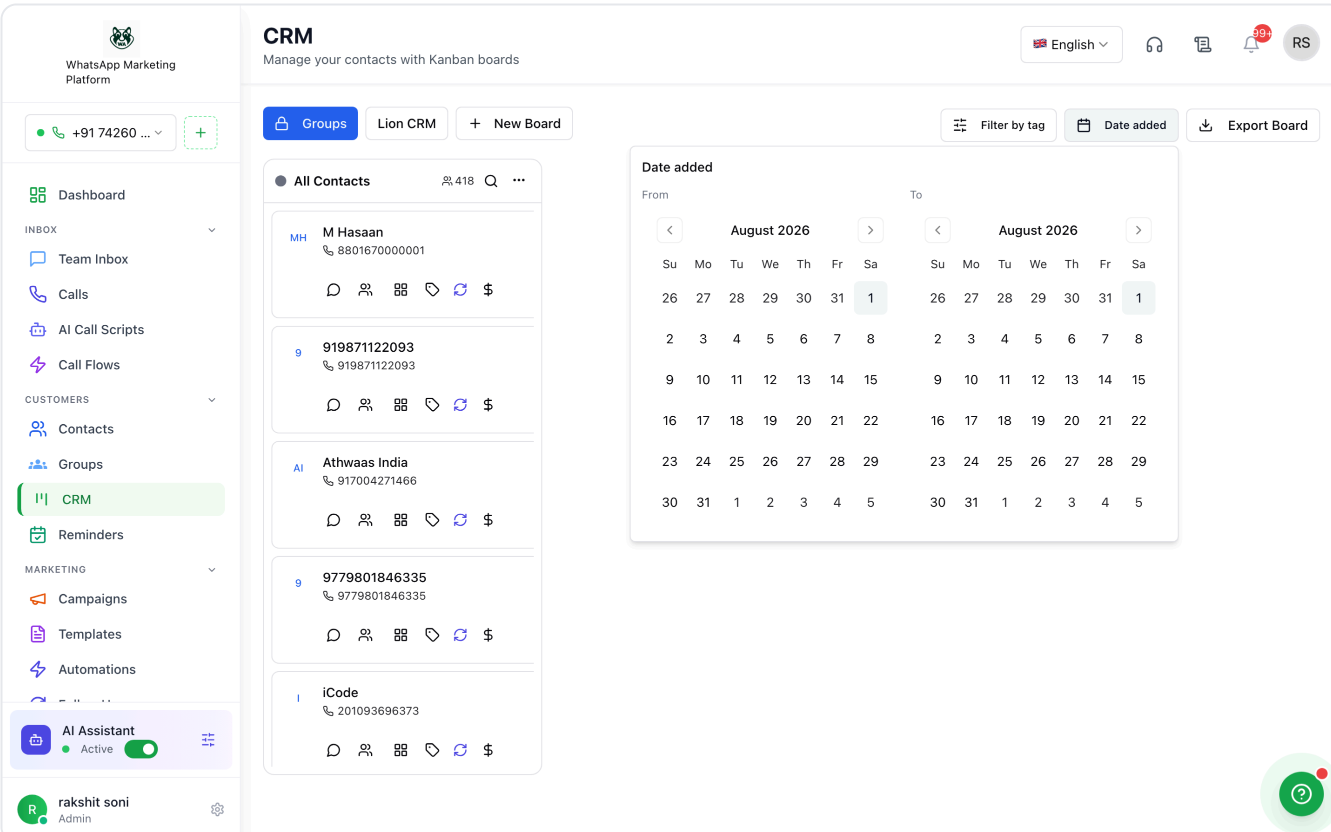
Board selector dropdown showing existing boards and the + Create option

1. **Add a stage (column).** Click **Add Stage / Create Stage**, give the column a name, and pick a colour. The new column appears at the end of the board.



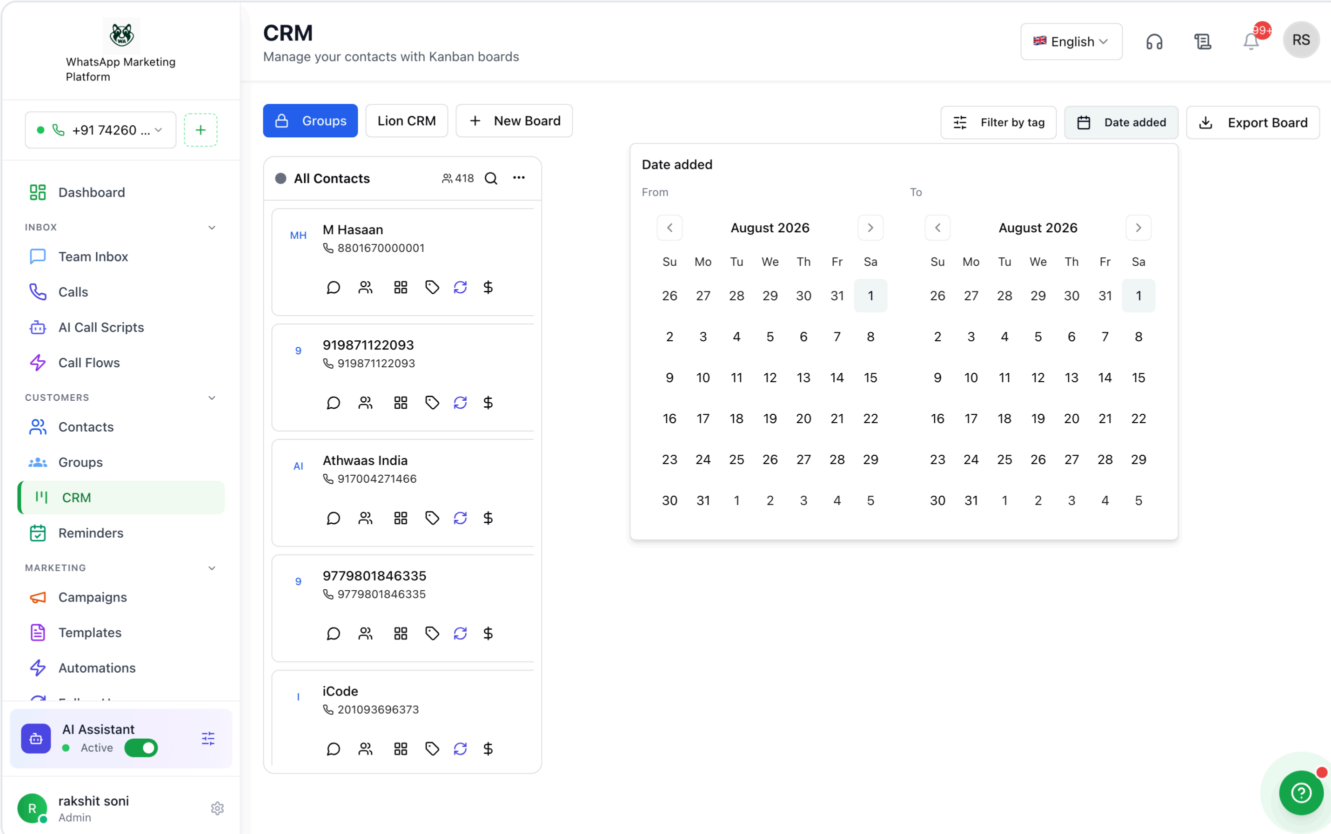
Create Stage dialog — stage name and colour picker

1. **Manage a column from its menu.** Each column header has a ··· **(more)** menu with **Rename Stage**, **Change Color**, **Hide / Show Stage**, **Export Stage**, **Delete Stage** and **Truncate stage**. To reorder columns, drag a column's header pill left or right — the new order saves automatically.



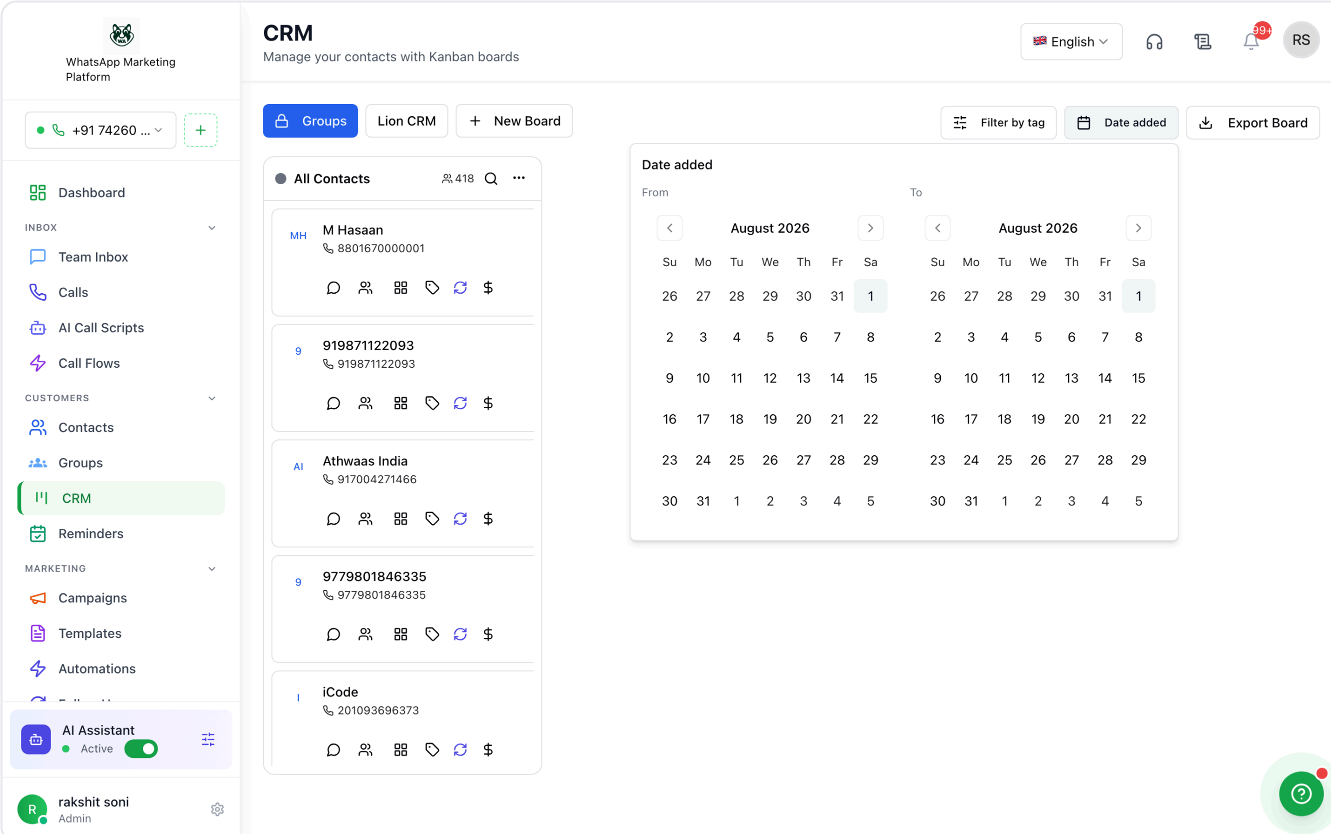
The column ··· menu — Rename, Change Color, Hide, Export, Delete, Truncate

1. **Add a contact as a card.** Click **Add Contact** on a column, pick an existing contact, and it drops into that stage as a card. (You can also push many contacts in at once from the Contacts page using its "Add to CRM" bulk action.)



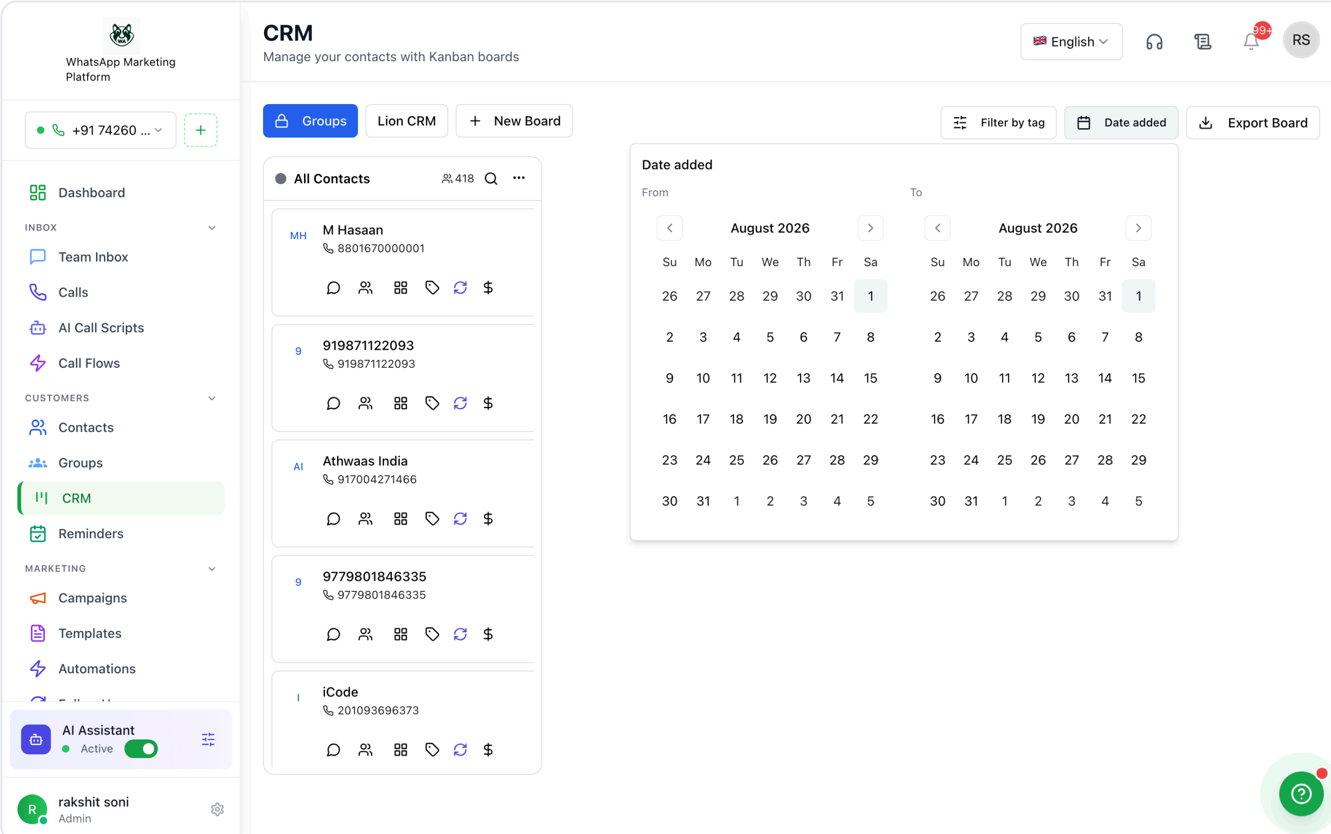
Add Contact on a column — choose an existing contact to place as a card

1. **Move a card between stages.** Drag any card and drop it on another column to move it there. Hold the **Alt** key while dragging to **copy** the card instead — the original stays and a duplicate is created in the target stage, so one contact can appear in two stages.



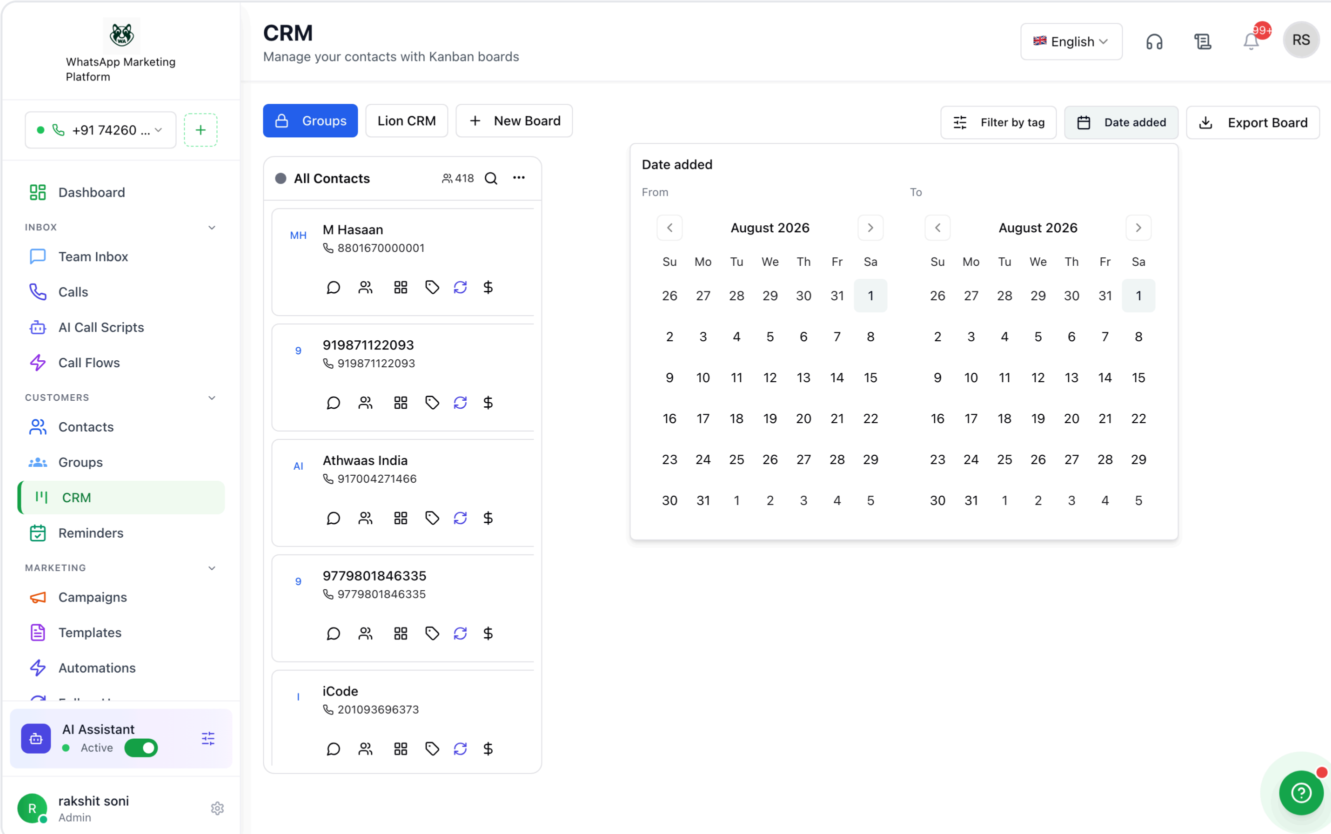
Drag a card to another stage to move it; Alt+drag to copy

1. **Tag a card.** Click the tag action on a card to open the tag popover. Search existing tags and tick to apply or remove them, or type a new value and **Create** it. Tags are shared across your whole account, carry colours, and show as small badges on the card.



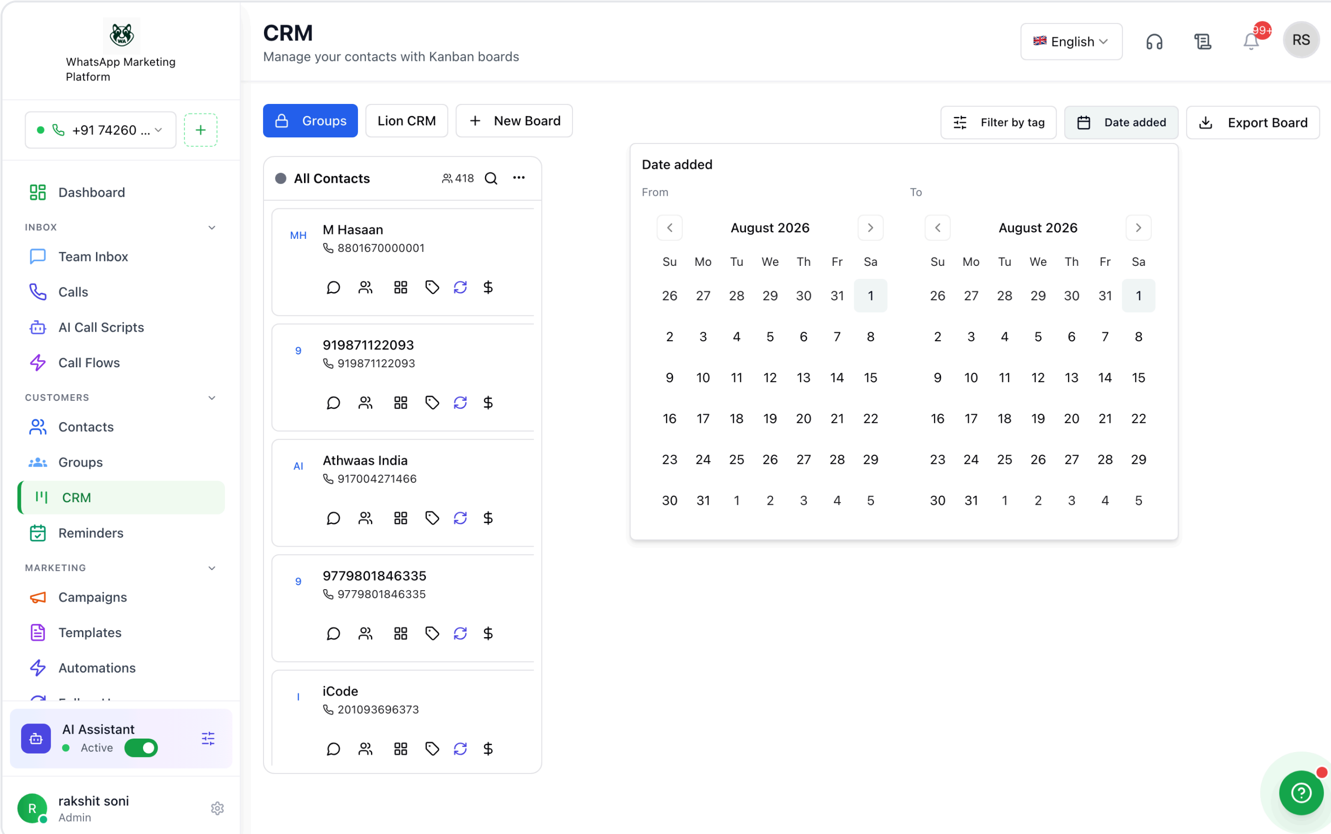
Card tag popover — search, tick to apply, or create a new coloured tag

1. **Filter the whole board.** Use the **Tag** filter and the **Date** filter at the top to narrow every column at once. The Date filter limits the board to contacts added within a from/to range; the "to" date includes the whole day.



Tag and Date-range filters narrowing every column at once

1. **Truncate a stage.** To empty a column but keep it, open its ⋯ menu and choose **Truncate stage**, then confirm. Every card in that stage is removed; the column stays and the contacts (plus their placements in other stages) are untouched. This cannot be undone.



Truncate stage — confirm to wipe all cards from one column, keeping the column

Tips

- The Tag filter and Date filter apply to the entire board at once, so you can quickly narrow every column to the leads you care about.
- Use **Export Board** to download all cards, or **Export Stage** from a column's ⋯ menu to export just one stage (Stage, Name, Phone, Email, Value, Notes, Added On).
- Use **Hide Stage** to declutter the board without deleting a column — show it again from the same menu.
- Keep a card's contact reachable: open the tag popover and card details right where the lead sits, so notes and stage stay in sync.

FAQ

Q: How do I put one contact in two stages at once?

A: Hold the **Alt** key while dragging the card. That copies it into the target stage instead of moving it, so the original card stays where it was.

Q: Does Truncate delete my contacts?

A: No. Truncate only removes the cards in that one stage. The contacts, and any placements they have in other stages, all remain.

Q: Why is my board empty or asking me to select a channel?

A: The CRM is per-channel. Select an active channel first, then pick or create a board.

Q: Can I rename a column after creating it?

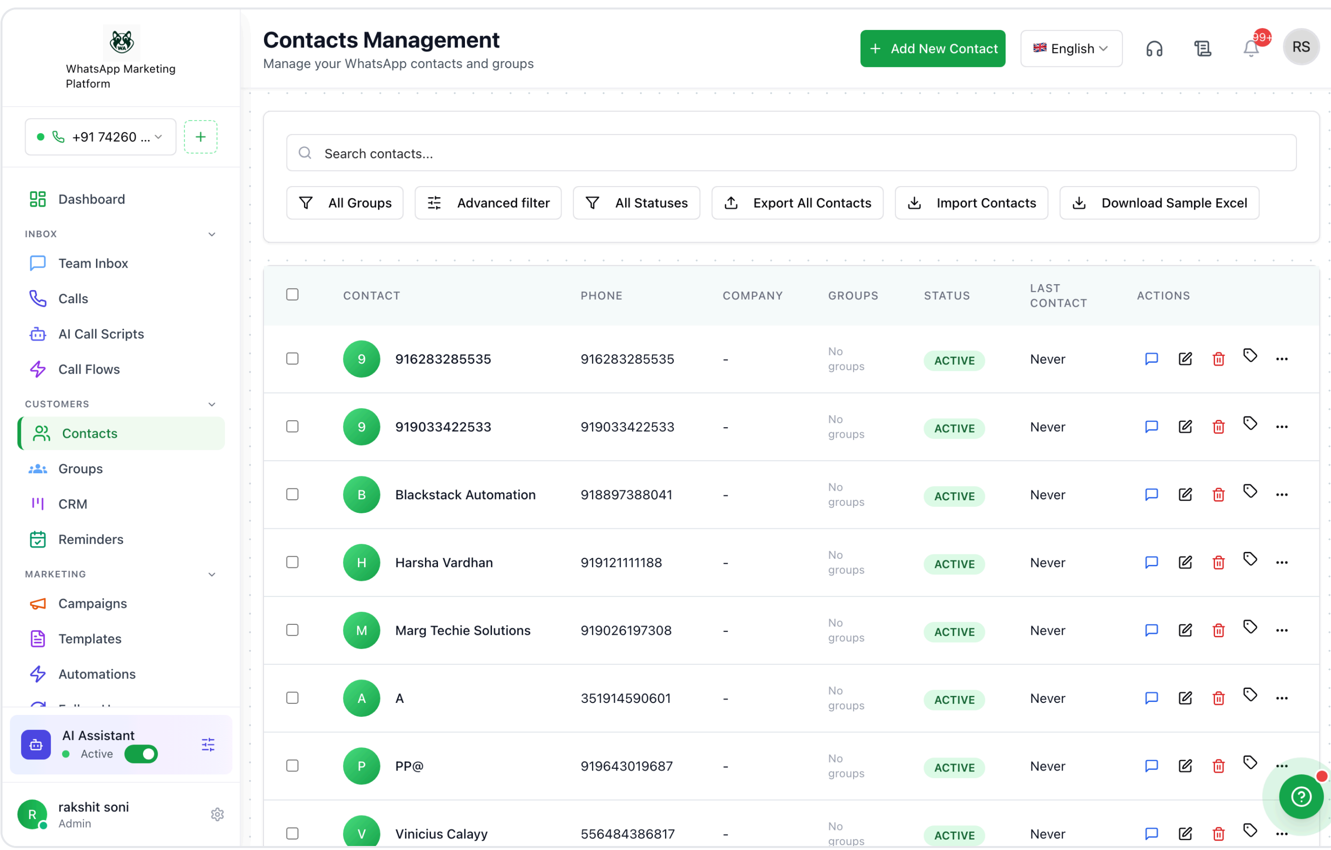
A: Yes — open the column's ⋯ menu and choose **Rename Stage**.

Contacts and Groups

Contacts is your address book in the platform — every person you message, group, run through the CRM, or add to a campaign lives here. **Groups** are simple labels that bundle contacts into audiences. Both sit in the left sidebar under the **Audience** group, on the `/contacts` and `/groups` pages.

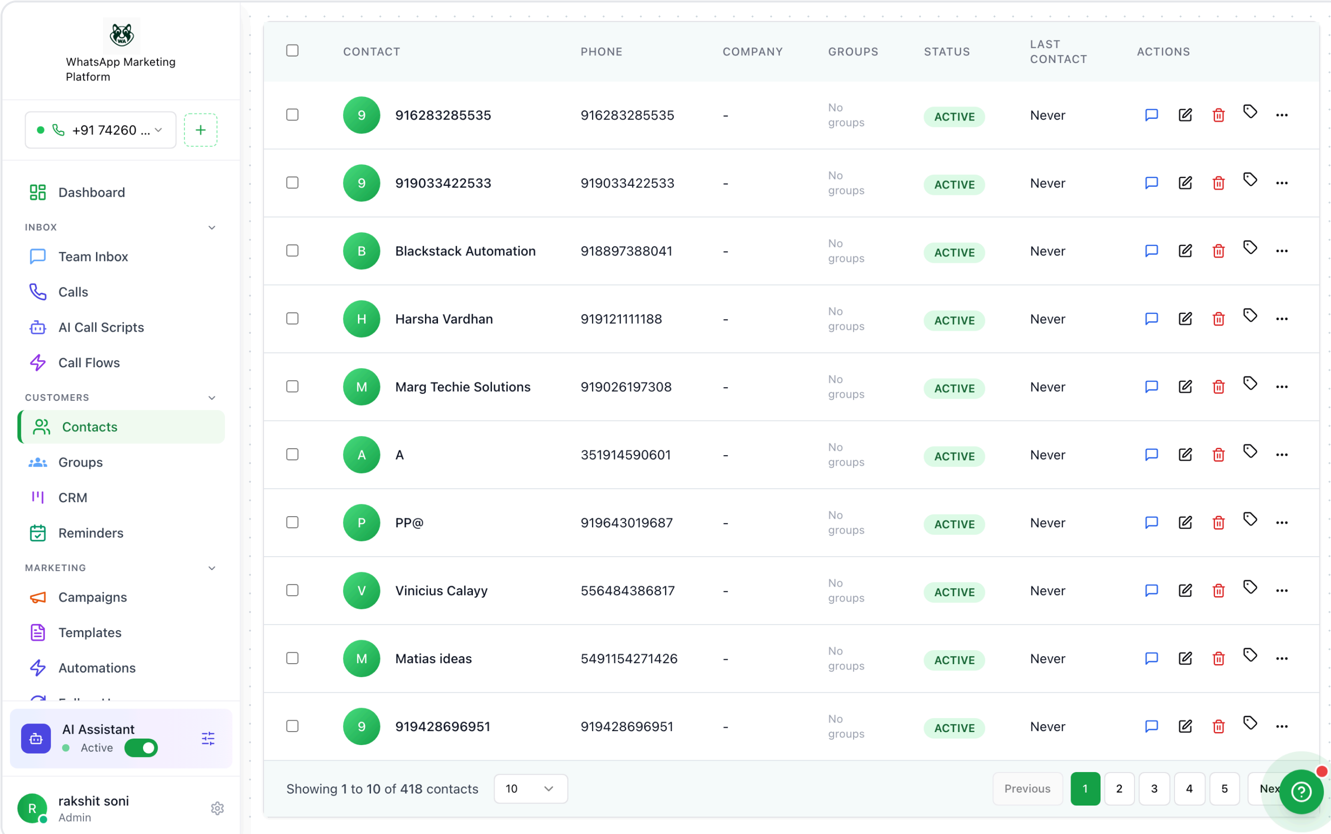
How to use (step by step)

1. **Open Contacts.** In the left sidebar, under the **Audience** group, click **Contacts**. The `/contacts` page shows your active channel's contacts in a paginated list, with a search bar and a filter row across the top and an **Add Contact** button in the top-right header.



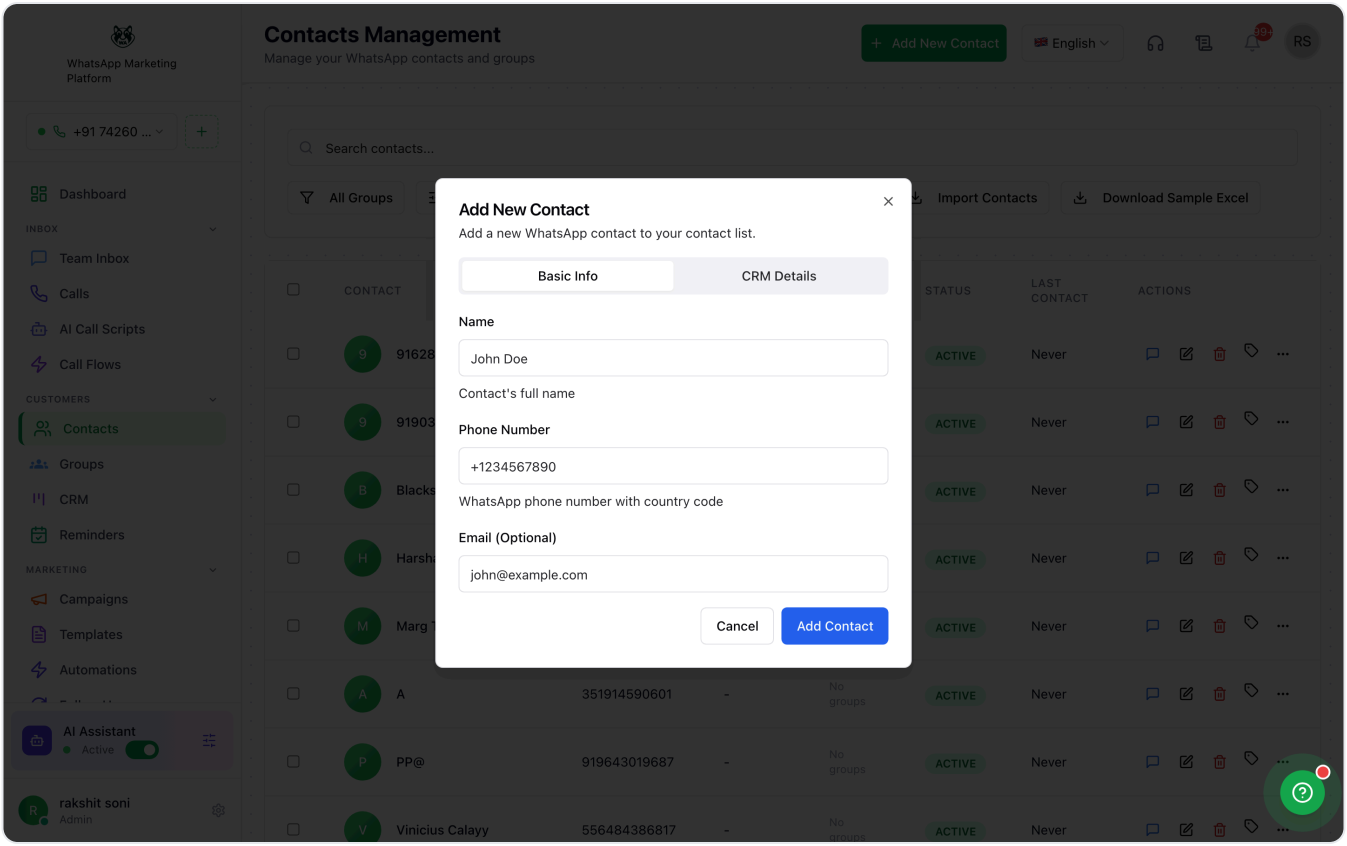
The Contacts page — list, top search bar, filter row, and Add Contact button top-right

1. **Add a single contact.** Click the **Add Contact** button (top-right). In the dialog, fill in **Name** and **Phone**, add an **Email**, and pick a **Group** if you like.



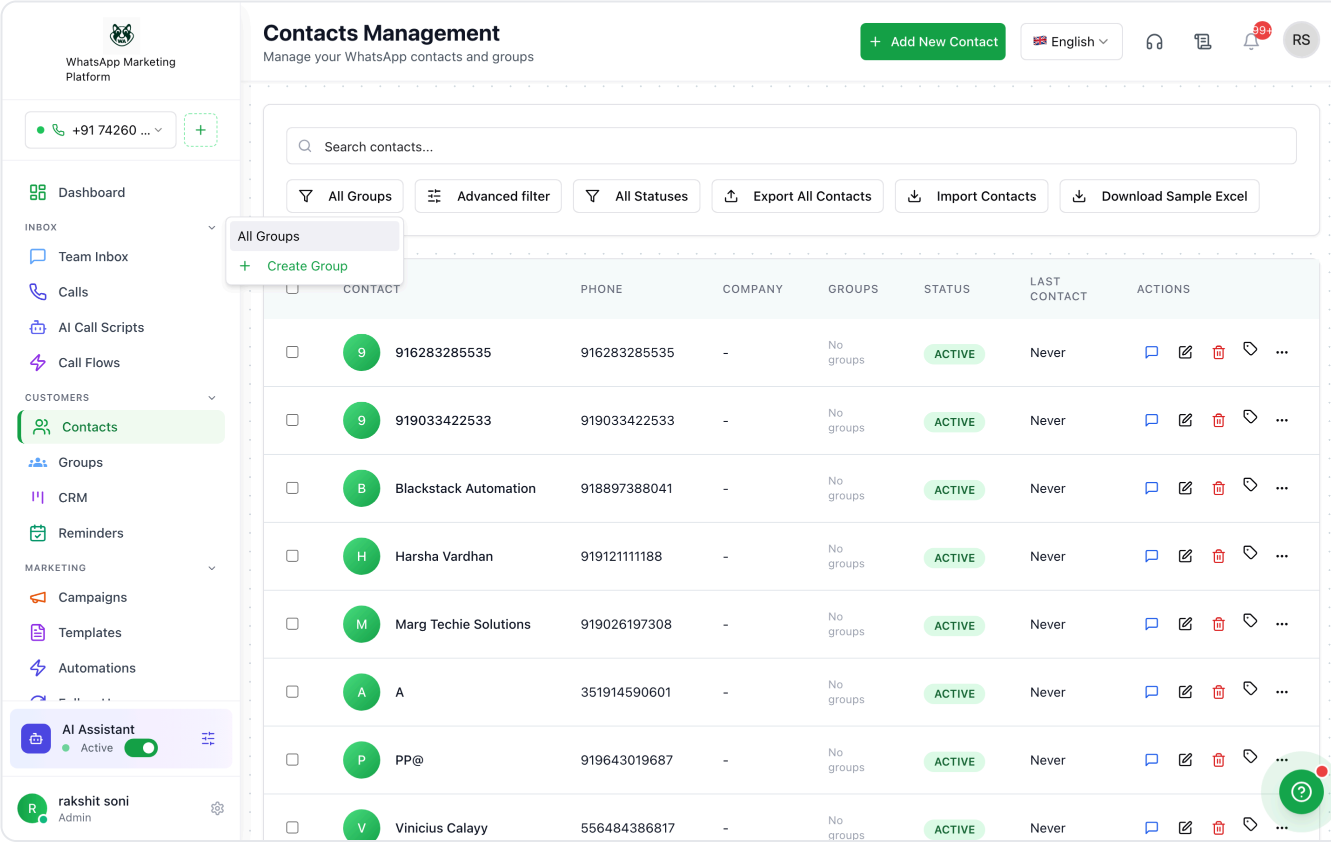
Add Contact dialog — Name, Phone, Email and Group fields

1. **Set the CRM details.** Expand the extra fields to add **Company**, **Gender**, **Date of Birth**, **Language**, **Address**, **Details** (notes), **Tags**, and any custom attributes (key/value pairs). Click save — the contact appears in the list.



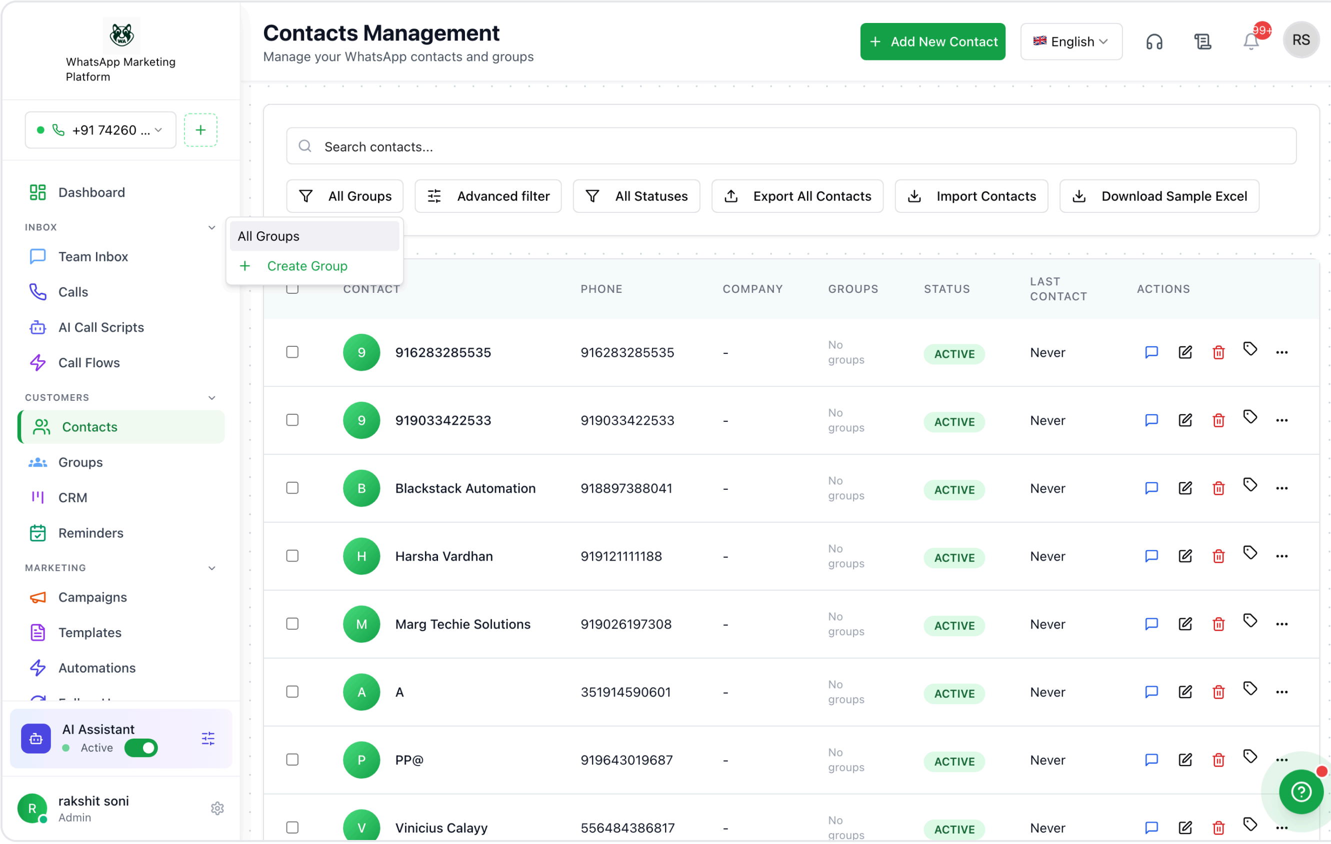
Expanded fields — Company, Gender, Date of Birth, Language, Address, Details, Tags

1. **Import from CSV or Excel.** Click **Import** in the filter row and choose a `.csv` or `.xlsx` file. Use **Download Sample Excel** first to get the exact headers: `name, phone, email, groups, tags, company, gender, dateOfBirth, address, details, language`. Separate multiple groups or tags with commas. After upload you'll see a summary of **Imported**, **Duplicates** and **Failed**.



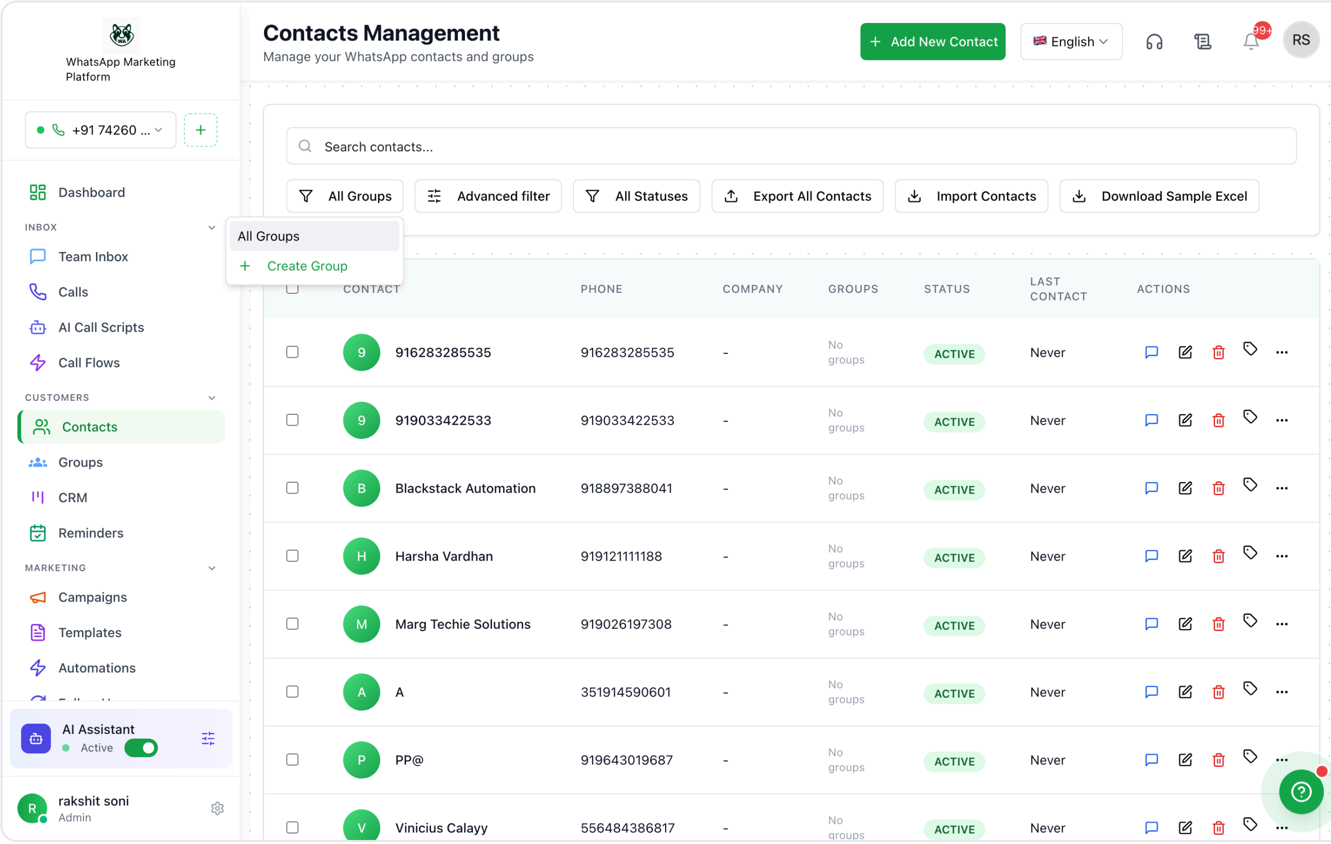
Import dialog — file picker, Download Sample Excel, and the import summary counts

1. **Filter the list.** Click the **filter** (sliders) button to open the Advanced Filter popover. Filter by **Groups**, **CRM stages**, **Tags** and **Date Added**. Each of Groups/CRM/Tags supports modes: none, has any of, has all of, and exclude — combine several at once.



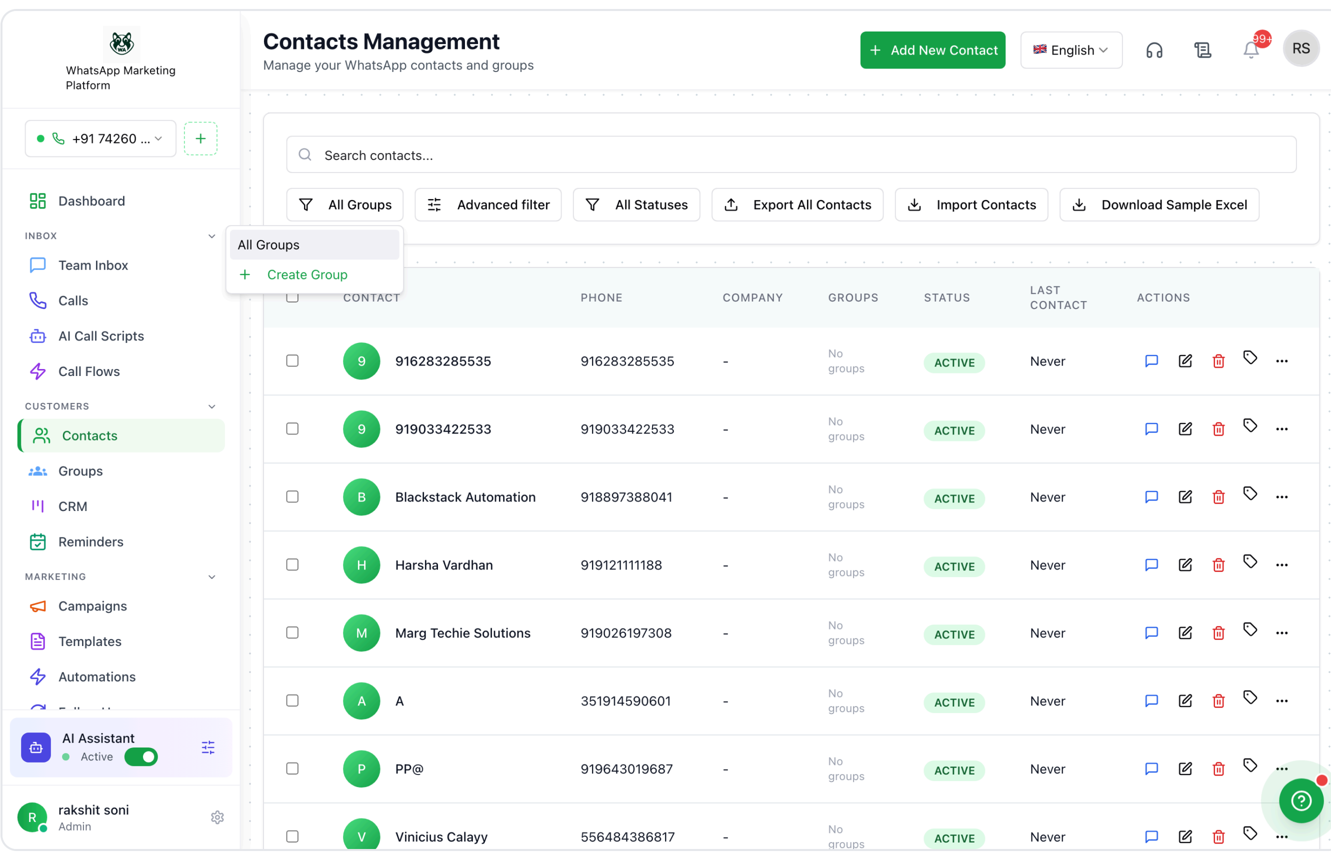
Advanced Filter — Groups, CRM stages, Tags and Date Added with has-any / has-all / exclude modes

1. **Bulk-act on contacts.** Tick the row checkboxes (or "select all"). A bulk action bar appears with **Export Selected**, **Add to Group**, **Add to CRM**, **Remove from Group**, **Remove from CRM** and **Delete Selected**.



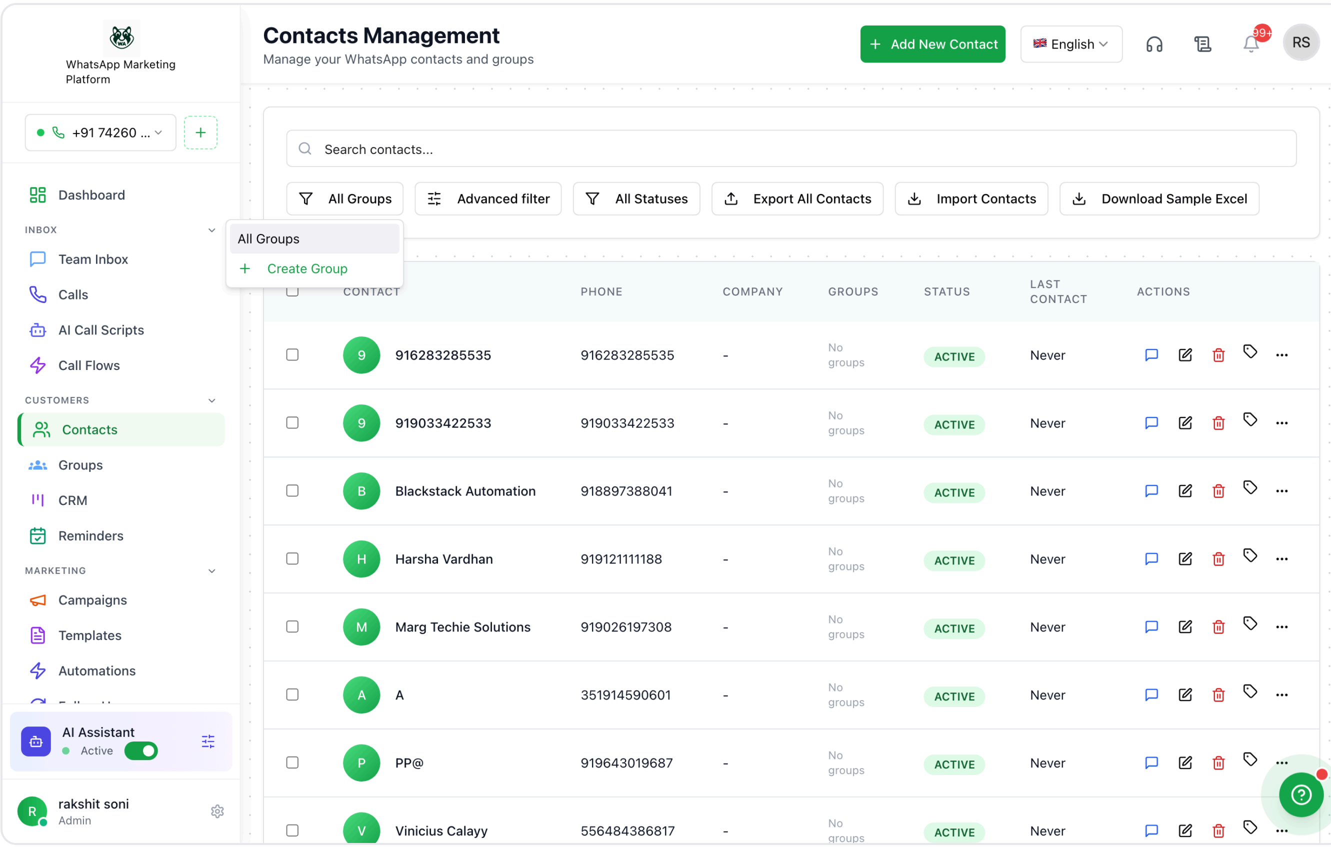
Bulk action bar — Export, Add to Group, Add to CRM, Remove from Group/CRM, Delete Selected

1. **Open Groups.** In the left sidebar, click **Groups** (Audience group). Each group shows as a card with its name, optional description, a live contact count, and its creation date.



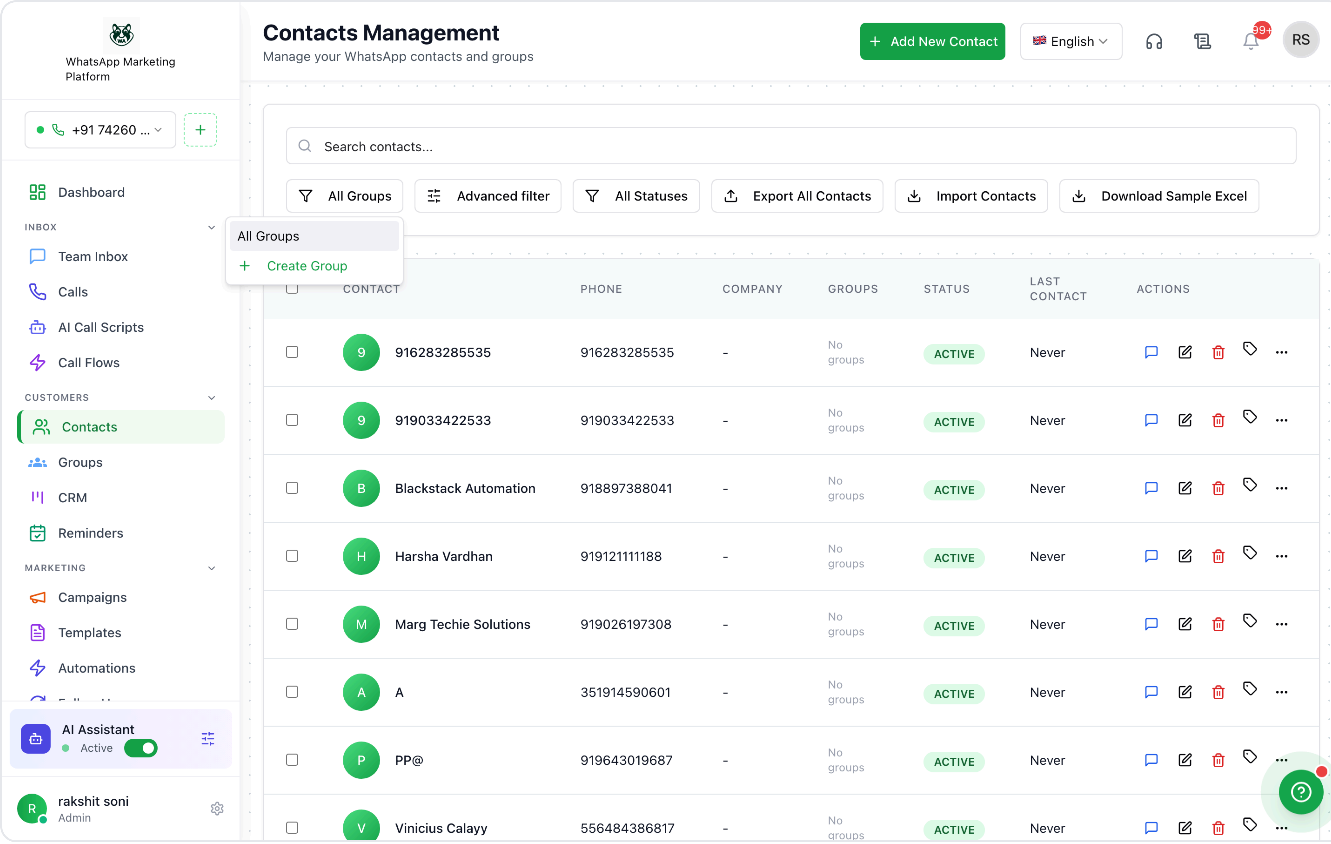
The Groups page — each group card with name, description, contact count and date

1. **Create a group.** Click **Create Group** in the top-right header, enter a **Group Name** (required, e.g. "VIP Customers"), optionally add a **Description**, and click **Create Group**. It appears in the list with a count of 0 contacts.



Create Group dialog — Group Name and optional Description

1. **Fill the group from Contacts.** You don't add members on the Groups page. Back on **Contacts**, select contacts and use the **Add to Group** bulk action (or assign a group when creating a contact, or via the `groups` CSV column). The count badge on the group card updates automatically.



Adding selected contacts to a group from the Contacts bulk action bar

Tips

- The Groups dropdown and Status dropdown in the filter row are quick single-value filters; the Advanced Filter combines several conditions at once.
- **Export All Contacts** downloads every contact for the active channel, not just the current page.
- Contacts and groups are scoped to your active channel — switch channels to see a different set.
- Create reusable coloured tags in **Settings → Tag Library** so the same names and colours show consistently across Contacts, Inbox and the CRM board.

FAQ

Q: Do duplicates get added when I import?

A: No. Duplicate phone numbers are counted in the **Duplicates** total and skipped, so the same contact is never imported twice.

Q: Can one contact be in multiple groups?

A: Yes. Group membership is a list, so a contact can belong to as many groups as you want.

Q: If I delete a group, are the contacts deleted too?

A: No. Deleting a group only removes the label — the contacts stay in your address book. To take a contact out of a group without deleting it, use the **Remove from Group** bulk action instead.

Q: What happens if I block a contact?

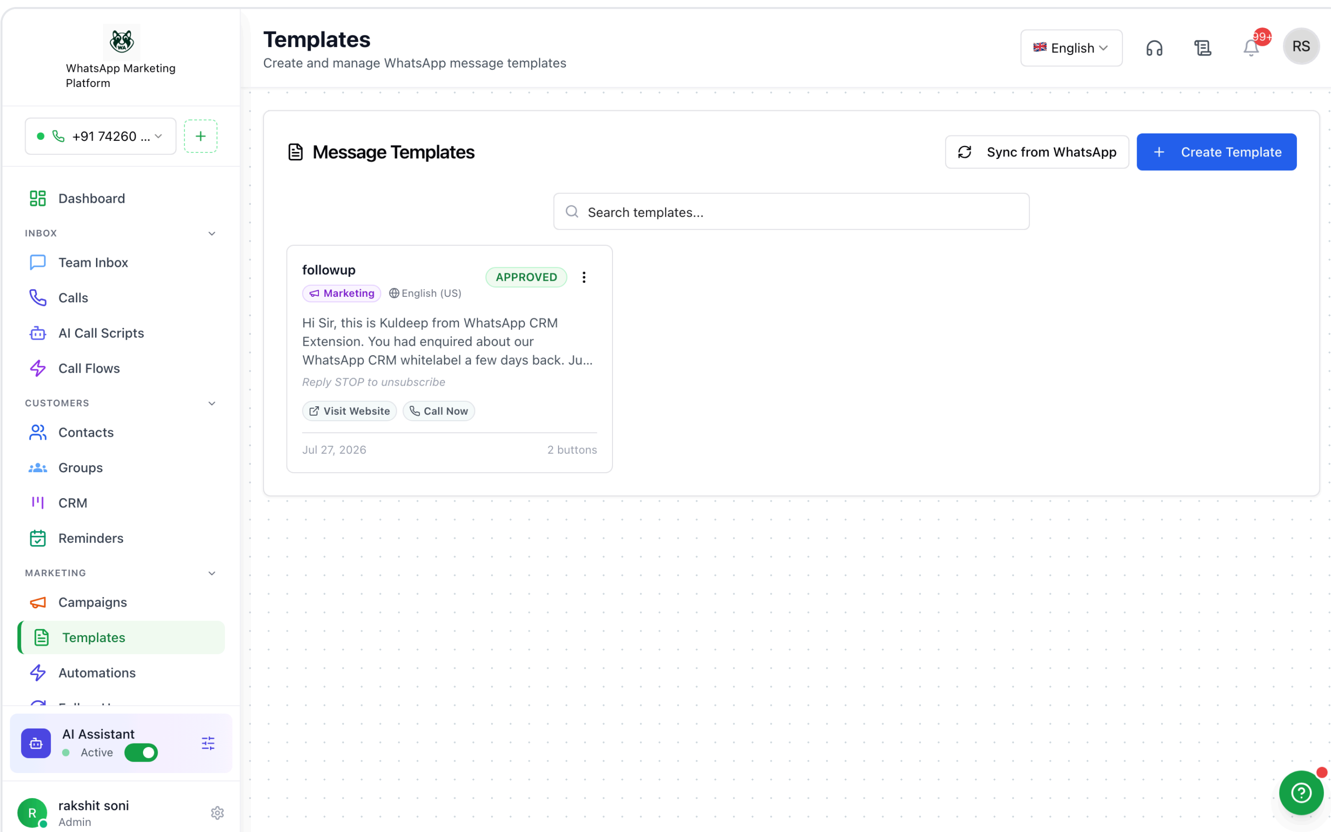
A: Blocked contacts are skipped by every sending path (campaigns and automations). Use the Status filter to view Active or Blocked contacts.

Message Templates

WhatsApp message templates are pre-formatted messages that Meta must **approve** before you can send them in bulk. Every campaign uses one. In the platform they live under **Templates** in the left sidebar (URL `/templates`), where you build them, submit them to Meta, and track their approval status.

Where to find it

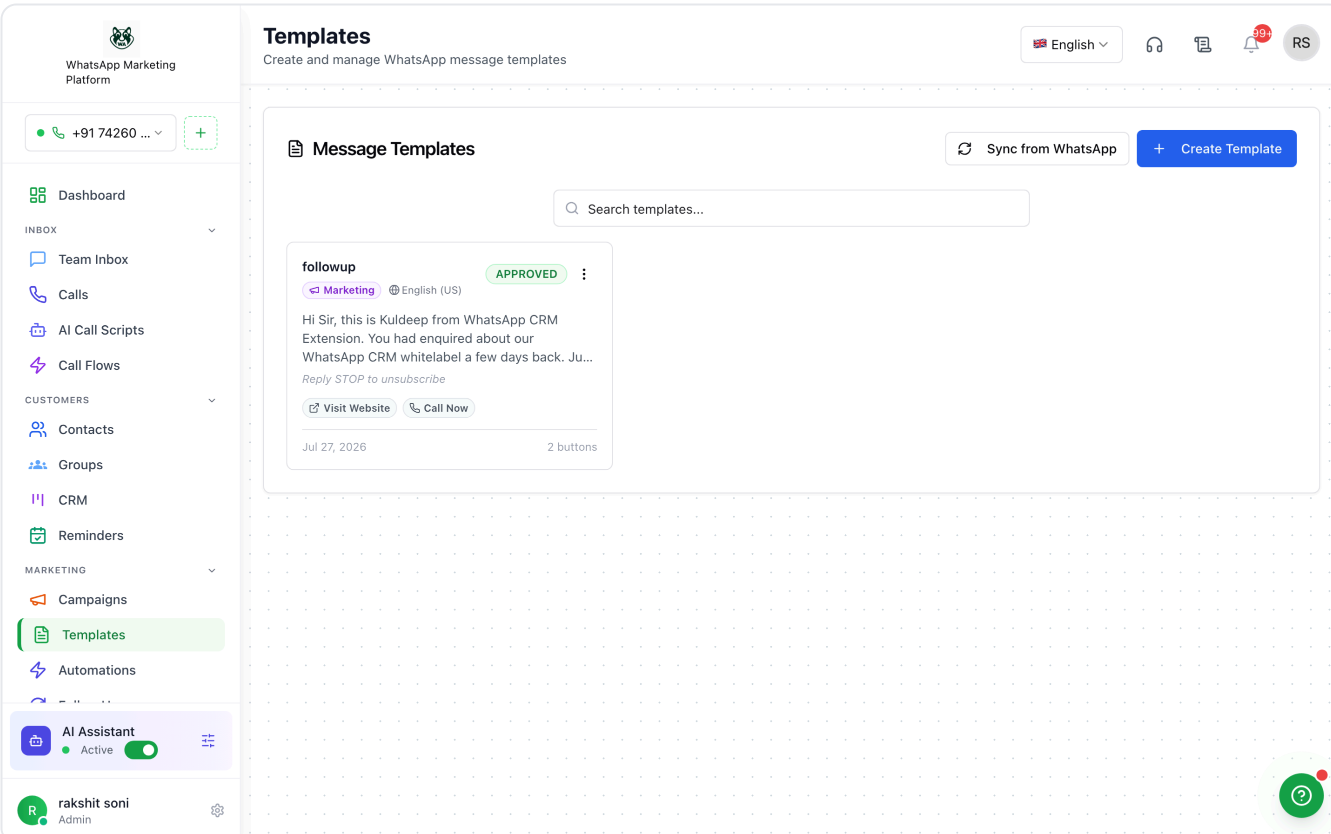
Open **Templates** in the left sidebar. Make sure a WhatsApp channel is selected first — the list is per channel. You'll see every template with its **status** badge (Approved, Pending, Rejected), category, language, and buttons. The **Create Template** button sits in the top-right; **Sync** (next to it) pulls the latest templates and statuses from your WhatsApp Business Account.



The Templates page — status badges, Sync and Create Template buttons top-right

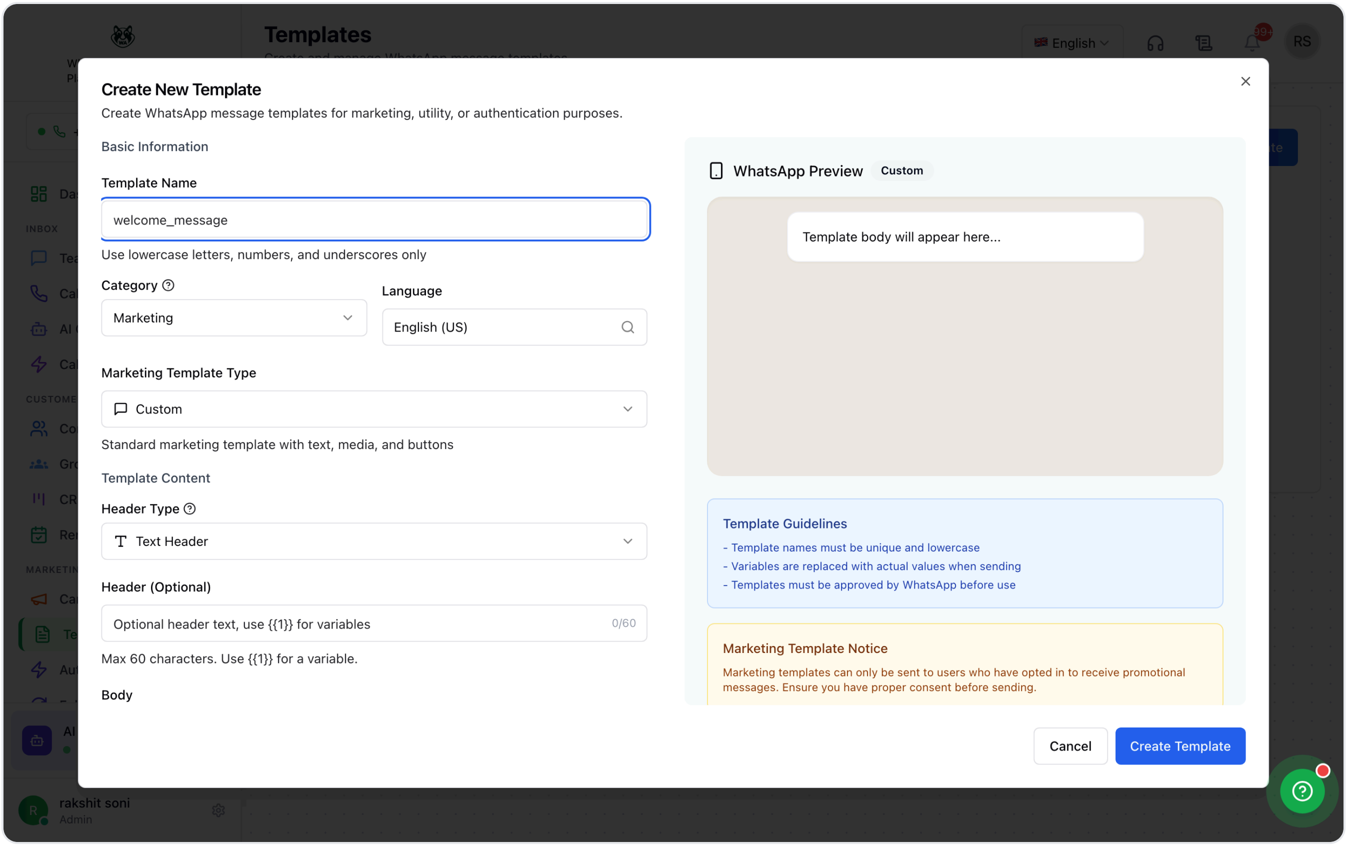
How to use (step by step)

1. **Open the builder.** Click the **Create Template** button in the top-right. The **Create New Template** dialog opens, split in two: the **form** on the left and a live **WhatsApp Preview** on the right that updates as you type.



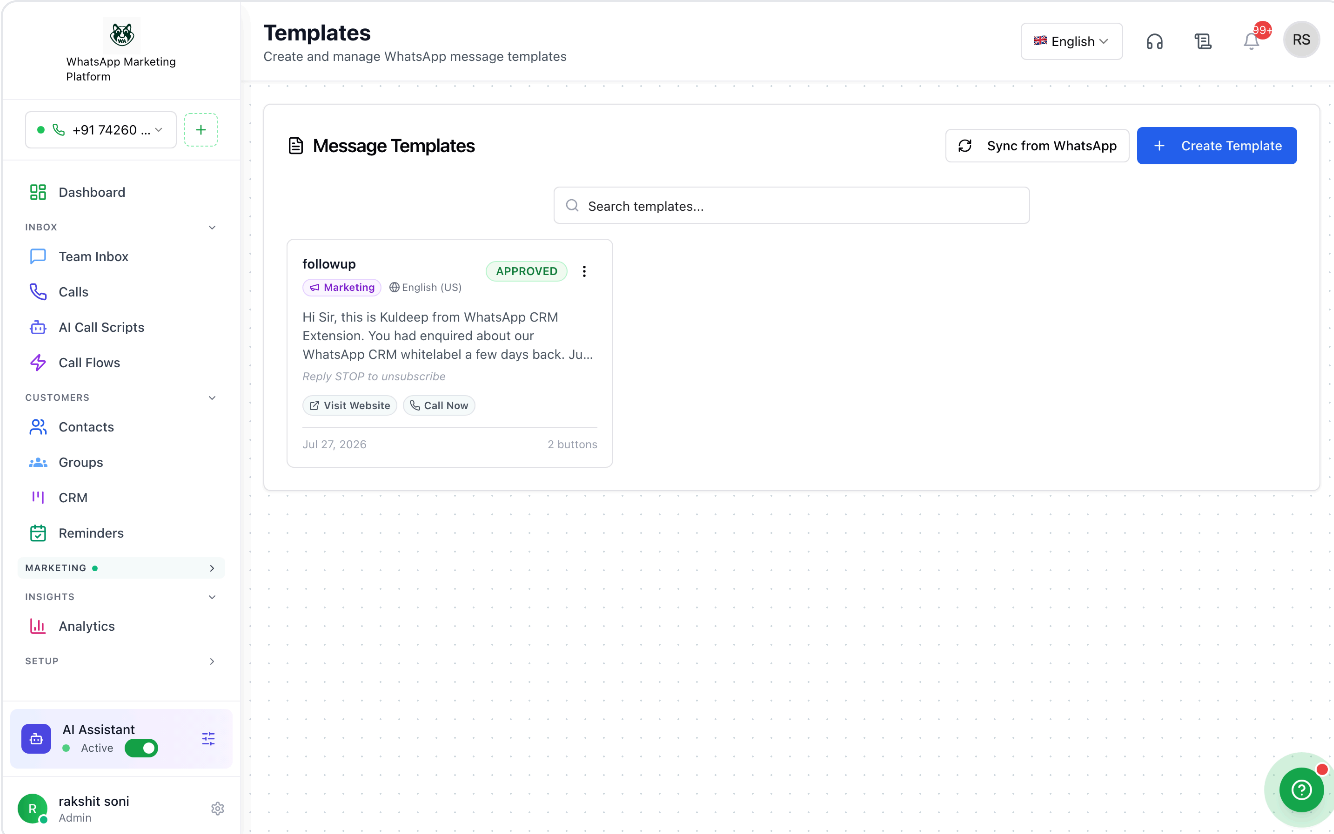
The two-pane builder — form on the left, live phone preview on the right

1. **Name the template.** In the **Template Name** field, type lowercase letters, numbers and underscores only (e.g. `summer_sale_2024`). Capitals, spaces and symbols are rejected as you type. This name is internal — the customer never sees it — and it is **locked once created**.



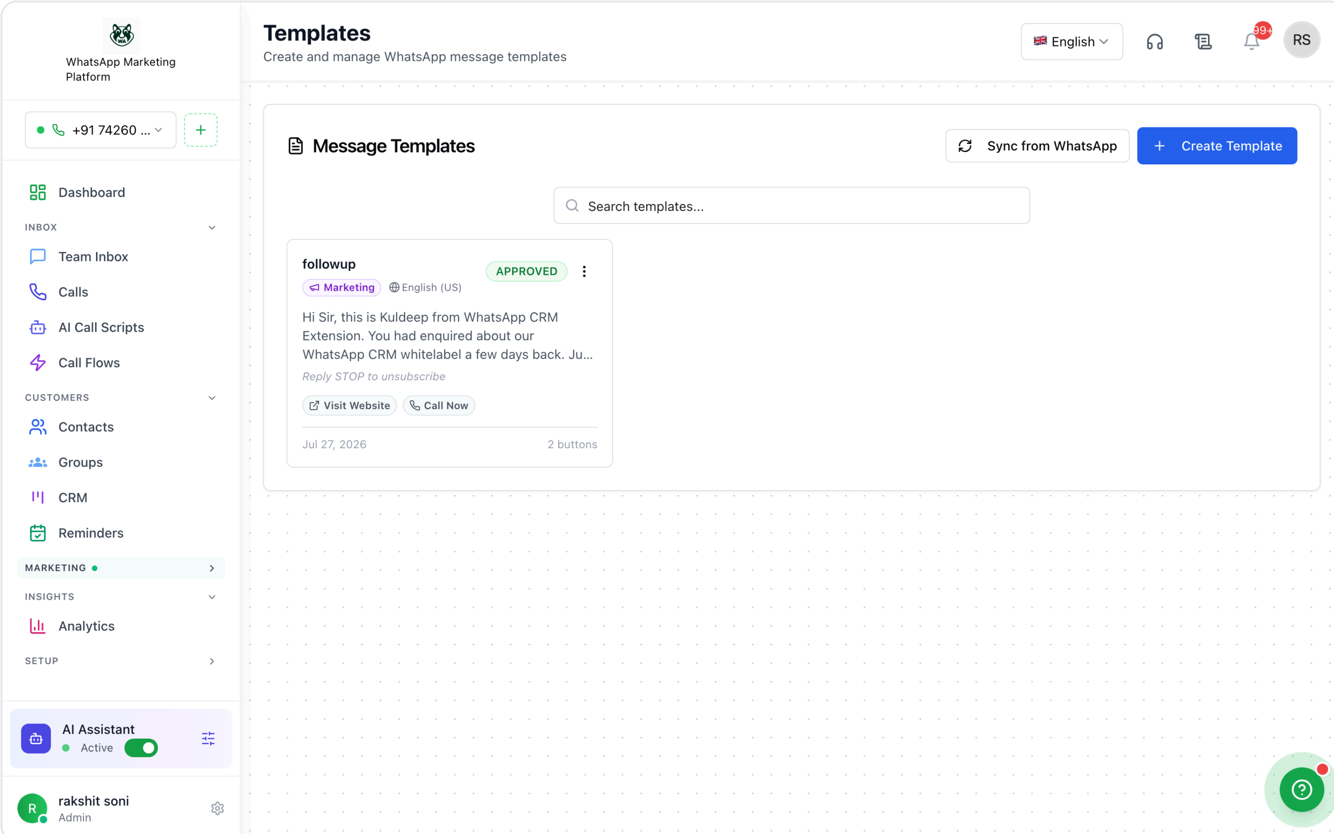
The Template Name field with a valid lowercase_underscore name

1. **Pick a Category.** Choose exactly one: **Marketing** (promotions, offers), **Utility** (order updates, reminders tied to a transaction), or **Authentication** (one-time passcodes). This is the most important choice — Meta approves or rejects based on it, and it is **locked after creation**.



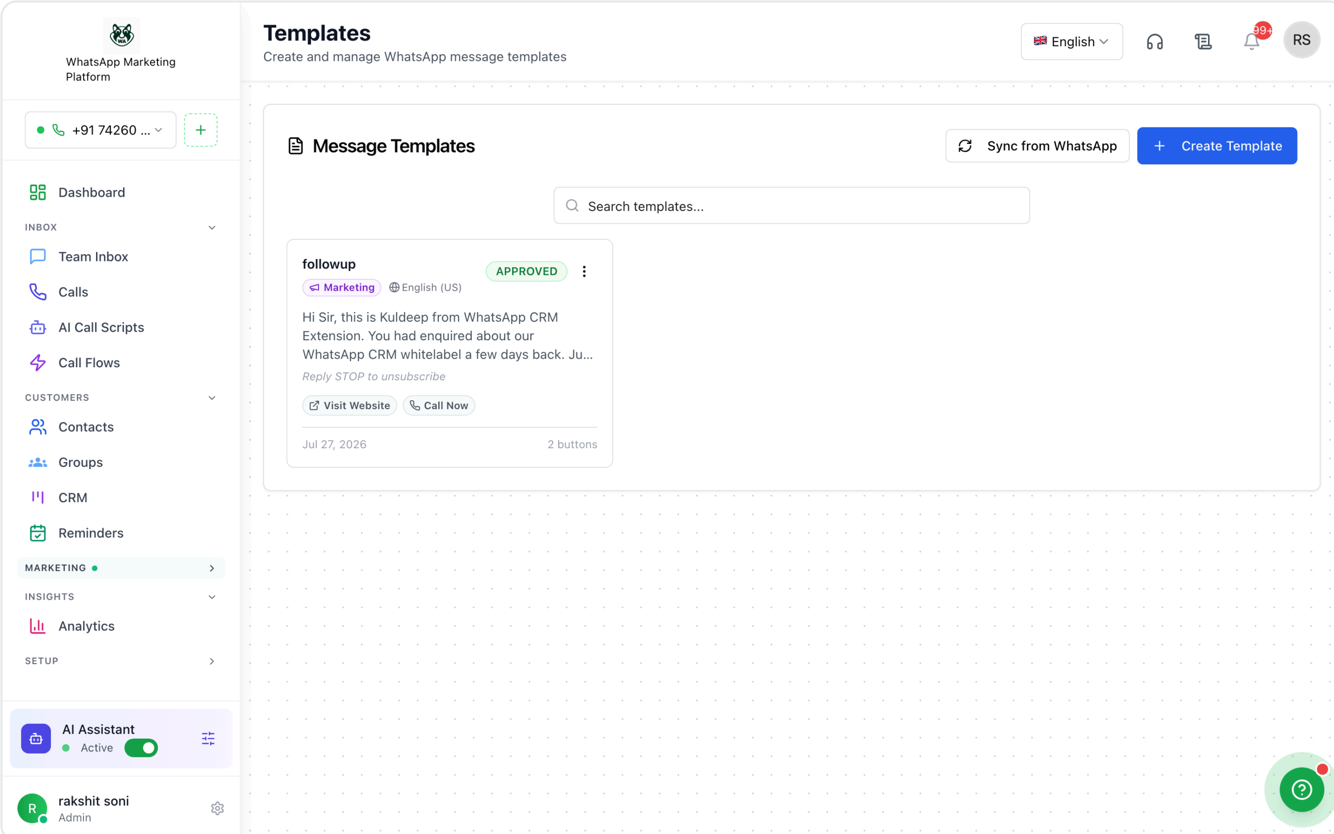
The Category selector showing Marketing, Utility and Authentication

1. **Choose the Language.** Click the **Language** field and search by language name or code, then pick from the list (e.g. `en_US`, `hi`, `pt_BR`). The body must actually be written in this language. Name + Language together identify the template at Meta, so use the same name with a different language for translations.



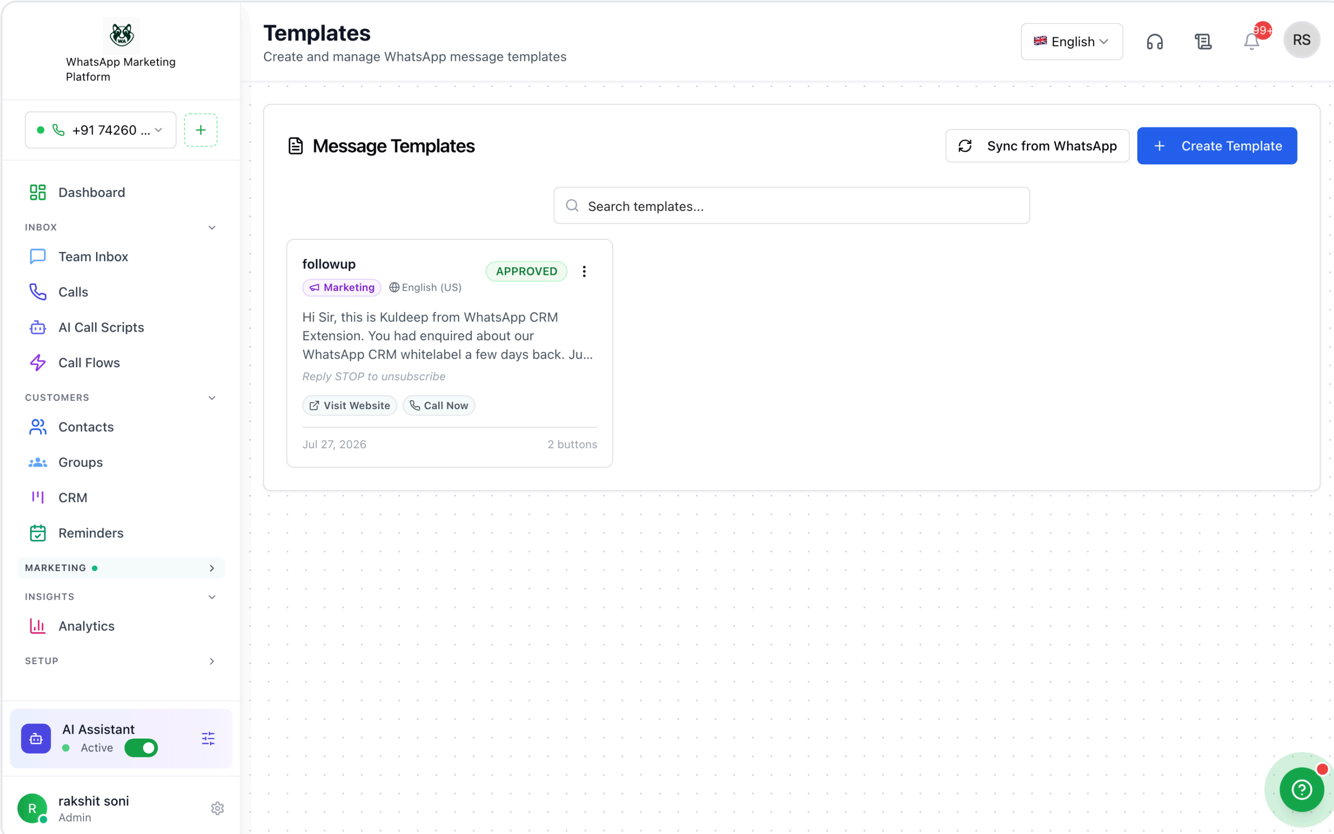
Searching the Language picker and selecting a locale

1. **Set the Header (optional).** Use the **Header Type** dropdown above the body. Pick **Text Header** for a short headline (max 60 characters), or **Image**, **Video**, or **Document** to reveal an **Upload Media** picker. Upload a sample file — this is what Meta reviews. A template can have only one header.



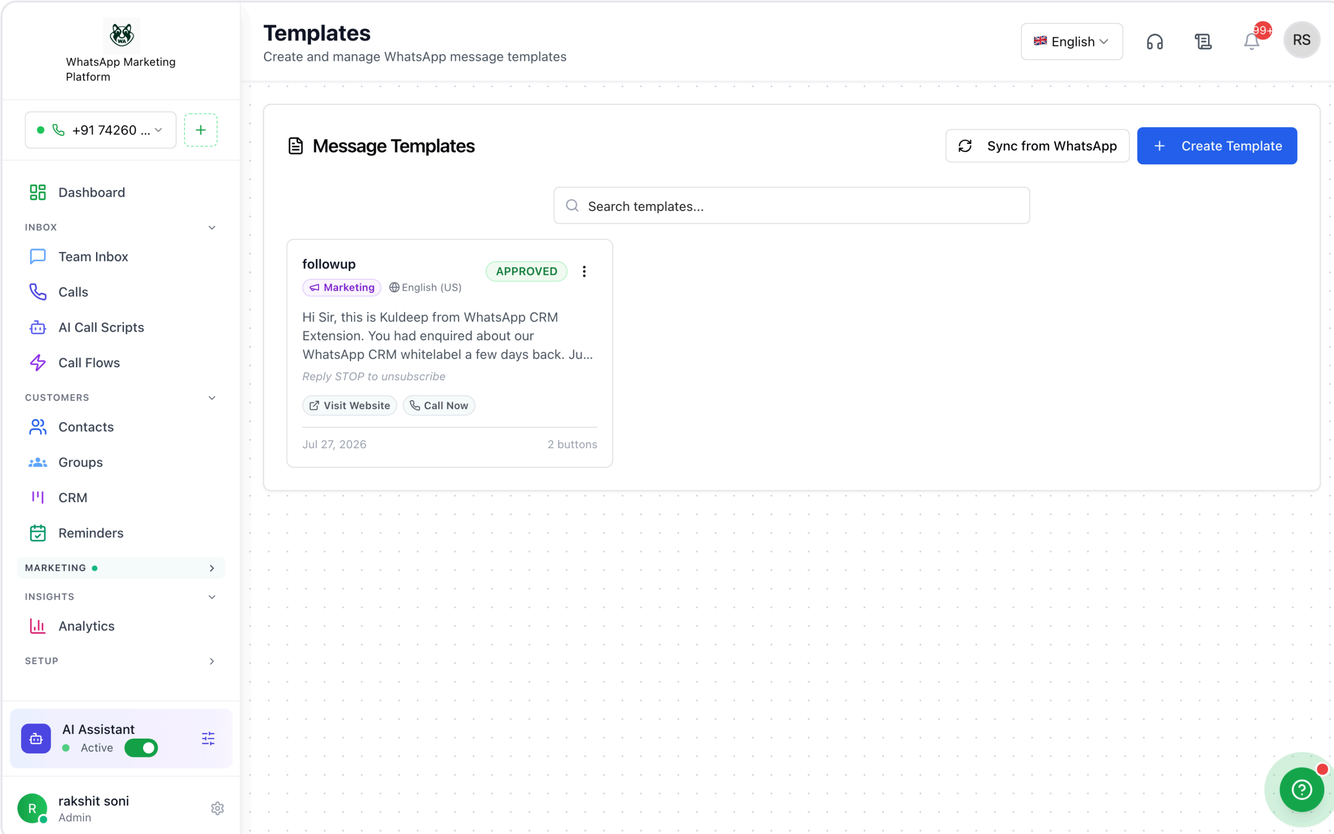
Header Type set to Image, showing the Upload Media picker

1. **Write the Body.** In the **Body** field type your message, up to **1024 characters**. Insert variables in order as `{{1}}`, `{{2}}`, `{{3}}`. A character counter turns red at the limit. Remember: the body **cannot start or end with a variable** — always wrap them in text.



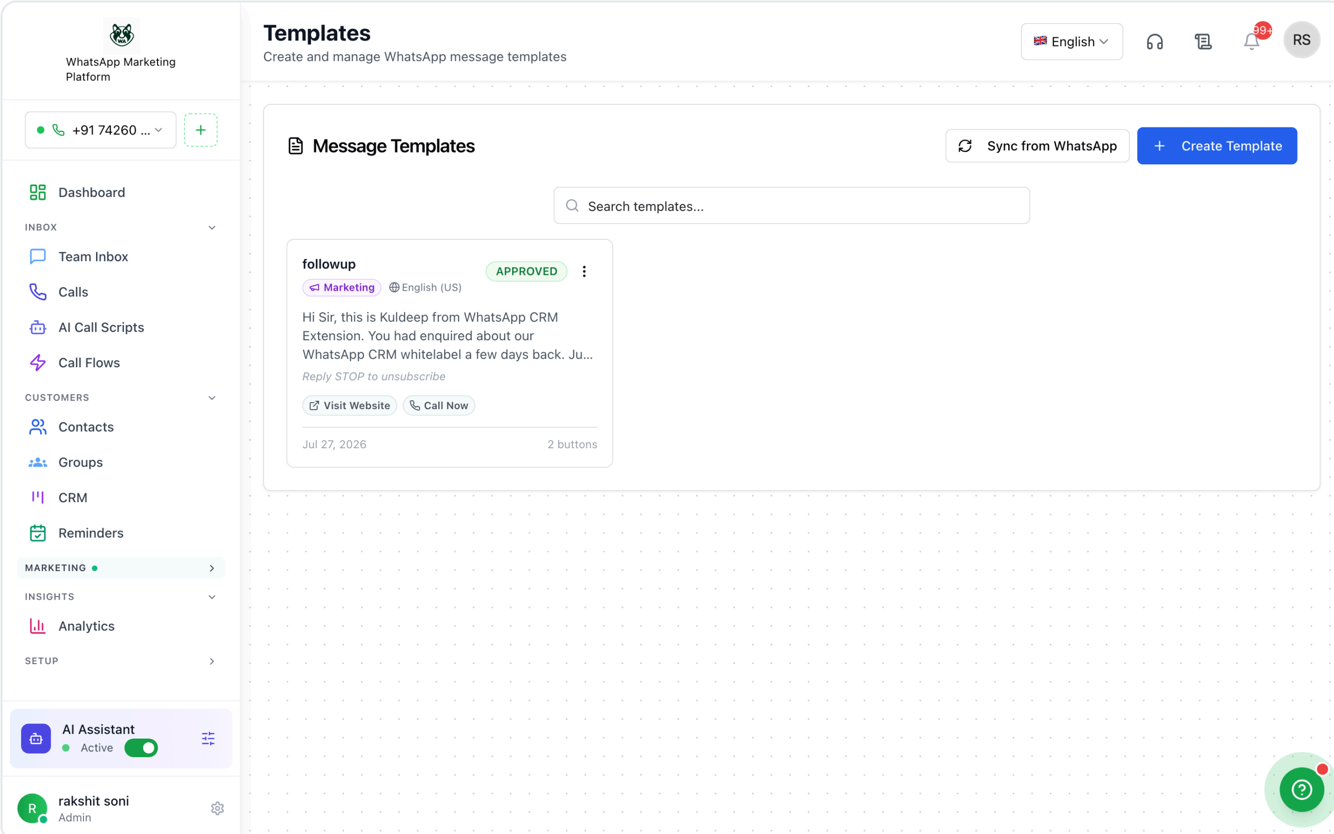
The Body field with {{1}} and {{2}} placeholders and the character counter

1. **Give each variable a sample.** As you add placeholders, **Detected Variables** badges appear and a **Sample Values for Variables** box asks for one example per variable. You **must** fill these — Meta needs them to review, and the preview uses them to render a realistic message.



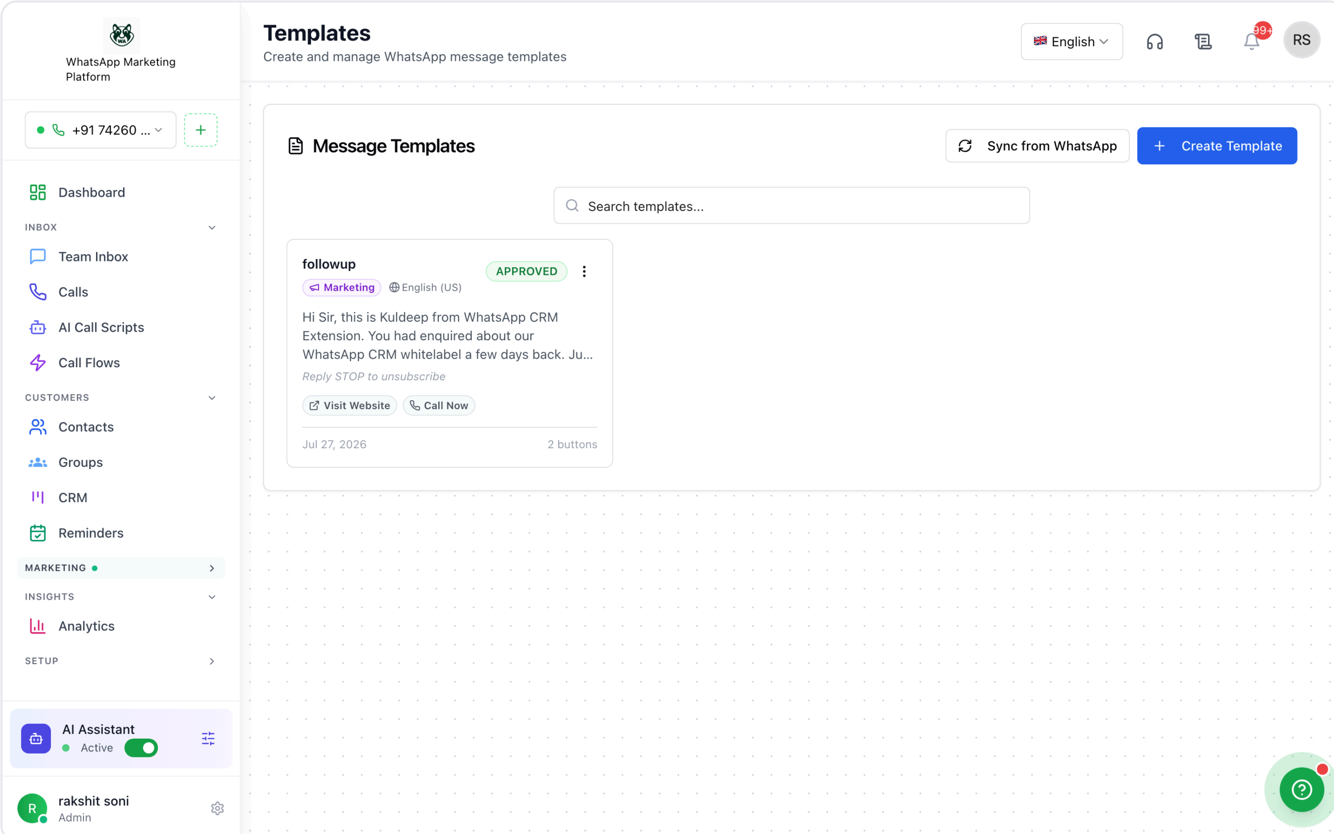
Detected Variables badges above the Sample Values for Variables inputs

1. **Add a Footer (optional).** Type up to **60 characters** of plain grey text under the body, e.g. "Reply STOP to unsubscribe". No variables allowed. (Footers are not available for Limited-Time Offer, Authentication, or Carousel templates.)



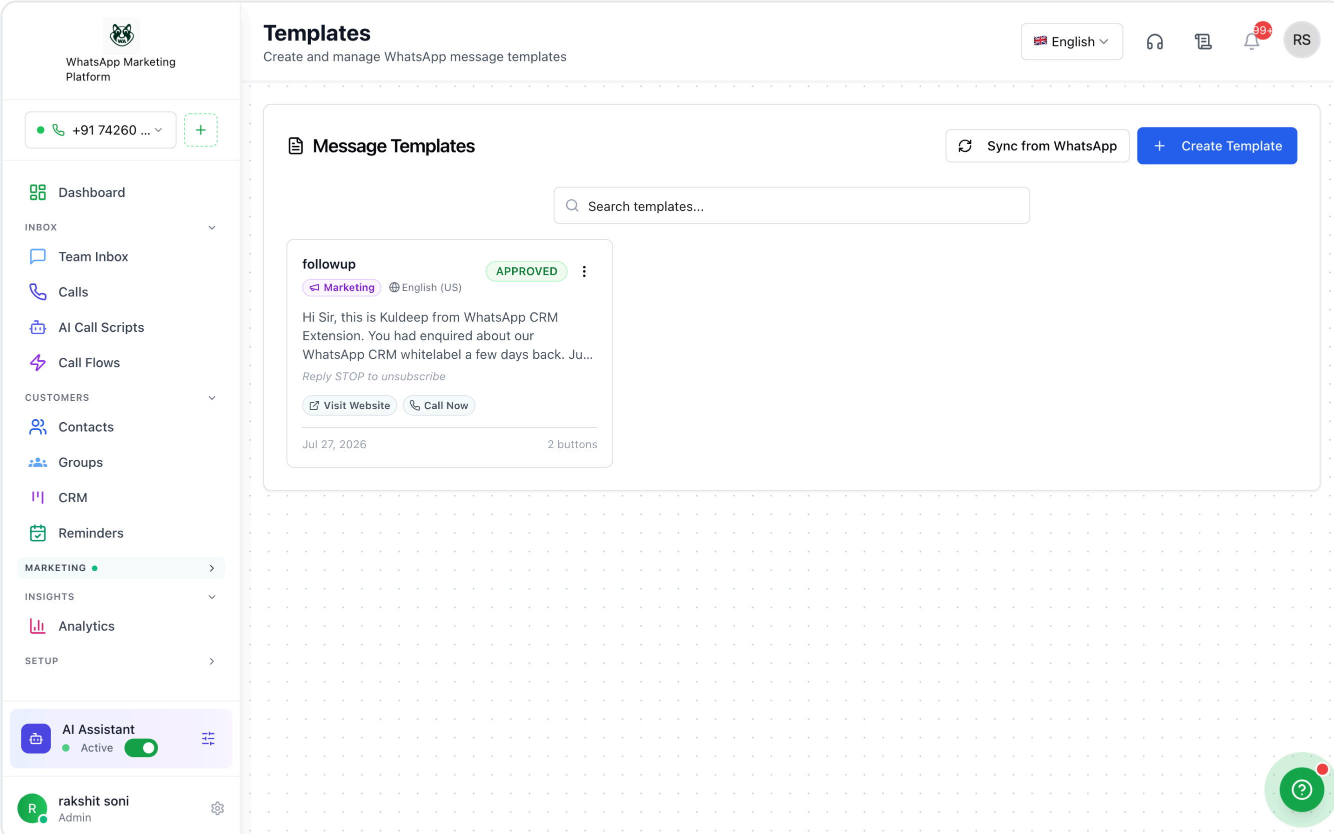
The optional Footer field with short grey text

1. **Add Buttons (optional, up to 3).** Click **Add Button** and pick a type: **Quick Reply**, **URL** (must start with `https://`), **Phone Number** (with country code), or **Copy Code** (promo code). Button text is max 25 characters. Quick Reply buttons can't be mixed with URL/Phone/Copy Code — the dropdown only offers what's still allowed and a live counter shows the cap.



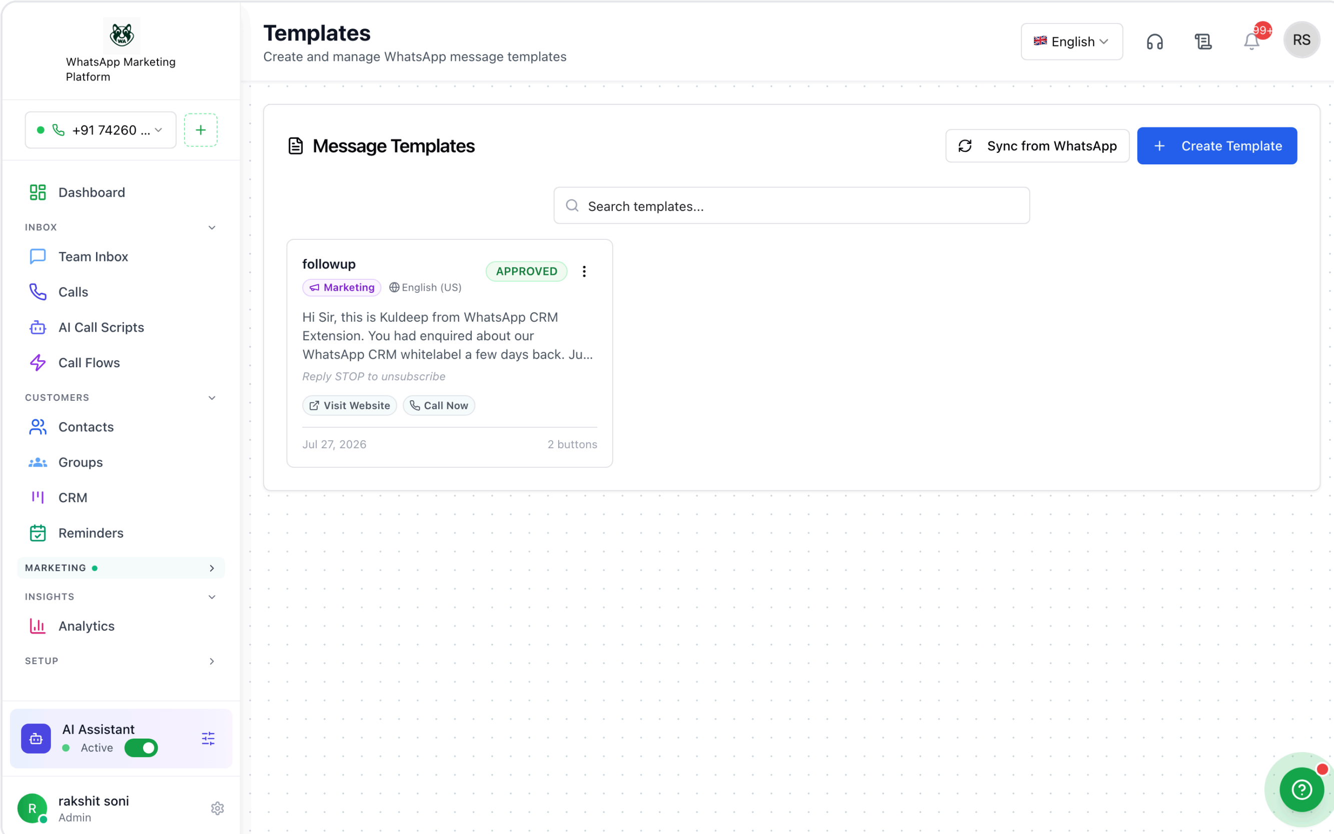
The Add Button row with the button-type dropdown open

1. **Check the live preview.** On the right, confirm the header, body (with sample values filled in), footer and buttons look right in real WhatsApp styling. A badge shows the active sub-type, and guideline notices below the phone flag common rejection risks before you submit.



The right pane rendering the finished template as WhatsApp will show it

1. **Submit for approval.** Click **Create Template** at the bottom. the platform validates the form, saves the template, and **submits it to Meta automatically**. Its status starts as **Pending** and moves to **Approved** or **Rejected** on its own — usually within minutes.



The Create Template button and the new Pending status badge in the list

Tips

- **Status updates itself** via webhooks — no need to refresh. Click **Sync** any time to pull the very latest status from Meta.
- **Match your category to your content.** Promotional wording ("Buy now!", "20% off!") in a Utility template is the number-one rejection cause.
- For a **Rejected** template, edit it (Name/Category/Language stay locked) and resubmit, or use **Duplicate** to start from a clean copy.
- Marketing sub-types (Coupon Code, Limited-Time Offer, Carousel) and Authentication options (code expiry, security disclaimer) only appear after you pick those categories.

FAQ

Q: How long does approval take?

A: Usually a few minutes, occasionally up to 24 hours. The status changes from Pending to Approved or Rejected automatically — you don't need to do anything.

Q: Why was my template rejected?

A: Common causes: a category mismatch, missing variable sample values, a body that starts or ends with a variable, non-`https` button links, or spammy/all-caps wording. Fix the issue and resubmit.

Q: Can I edit an approved template?

A: Editing generally requires re-submission and re-approval by Meta. The Name, Category and Language identify the template and stay locked, so keep them consistent.

Q: A variable shows an error when I send. Why?

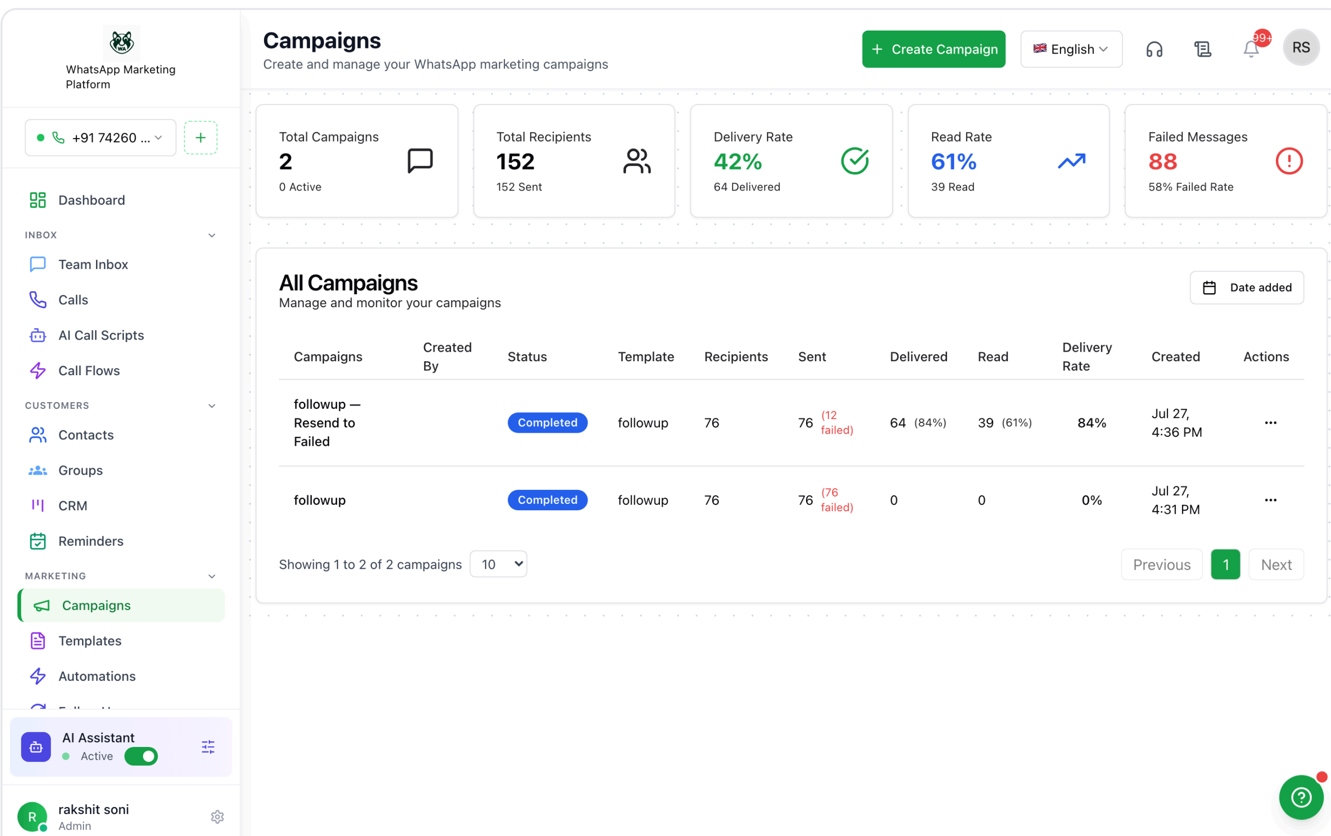
A: Every `{{N}}` must be mapped to a value at campaign time. Empty values cause Meta to reject the message, so the platform blocks the send until you fill them.

Campaigns

A campaign is a bulk WhatsApp send: you pick an **approved** template, choose who receives it, map any variables to real values, and send now or schedule for later. In the platform campaigns live under **Campaigns** in the left sidebar (URL `/campaigns`), where you also track delivery for every recipient.

Where to find it

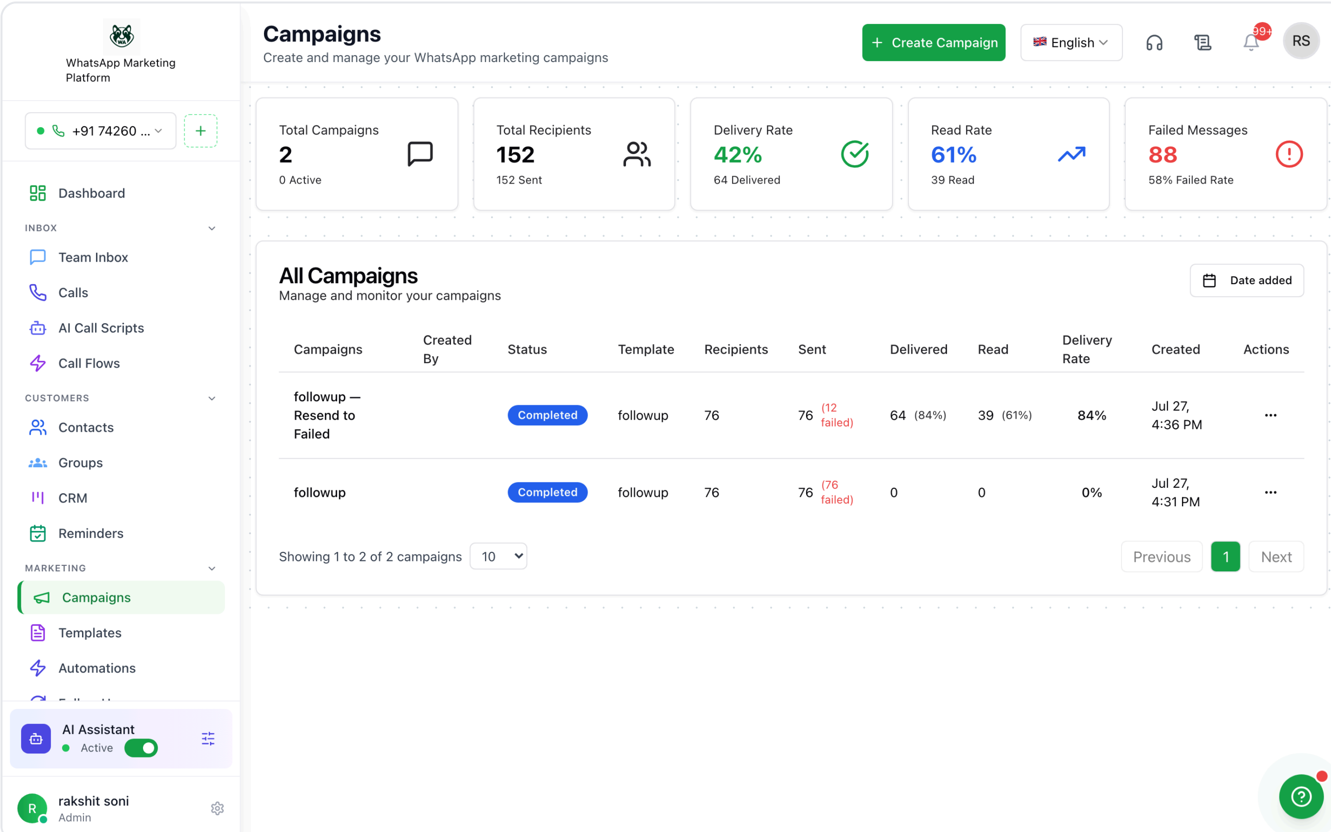
Open **Campaigns** in the left sidebar. You'll see campaign statistics at the top, a list of all campaigns with their status, and a **Create Campaign** button in the top-right. Before you start, make sure an **active WhatsApp channel** is selected and you have at least one **approved** template.



The Campaigns page — statistics, campaign list, and Create Campaign button top-right

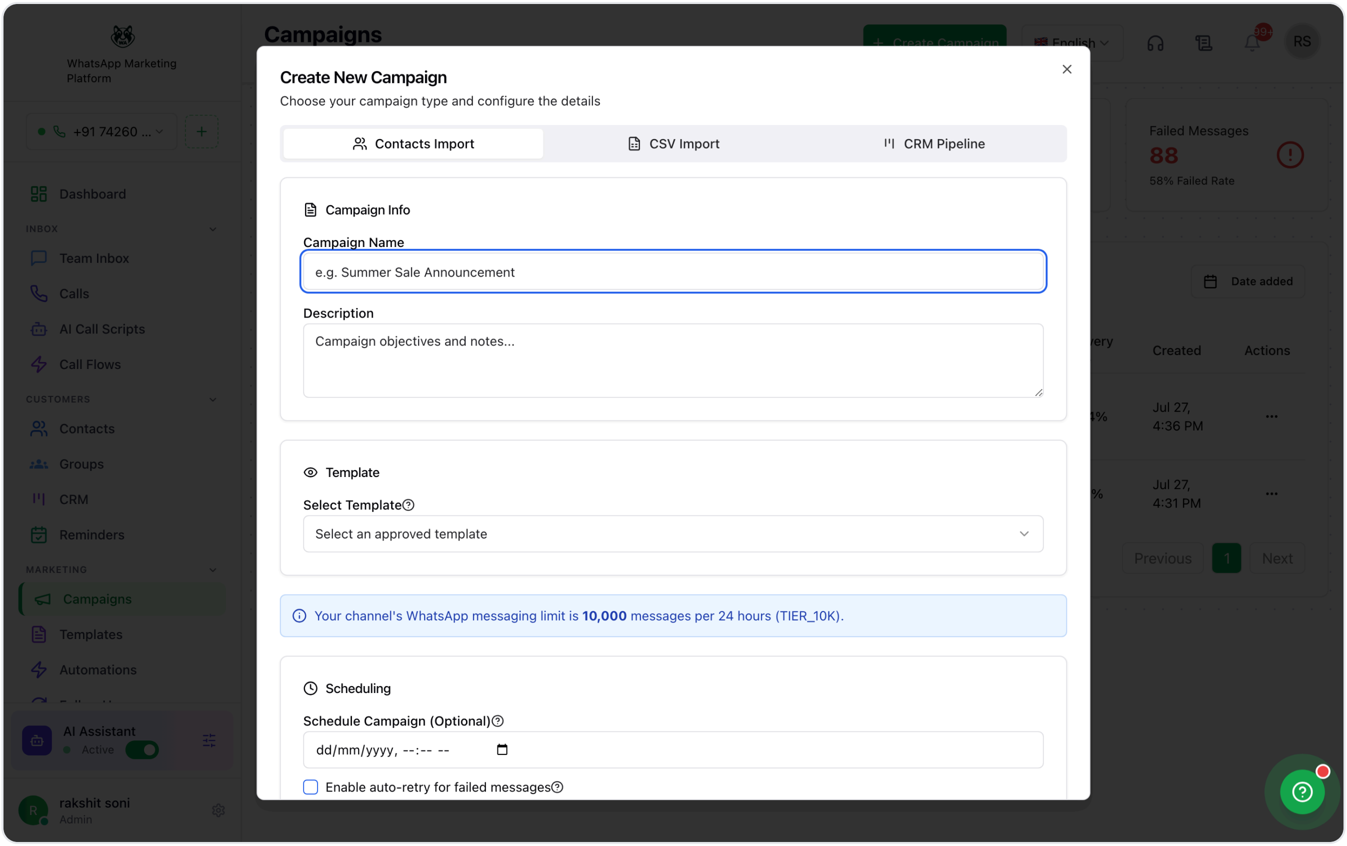
How to use (step by step)

1. **Open the builder.** Click the **Create Campaign** button in the top-right. A dialog opens with three audience tabs across the top — **Contacts Import**, **CSV Import**, and **CRM Pipeline** — followed by a series of cards.



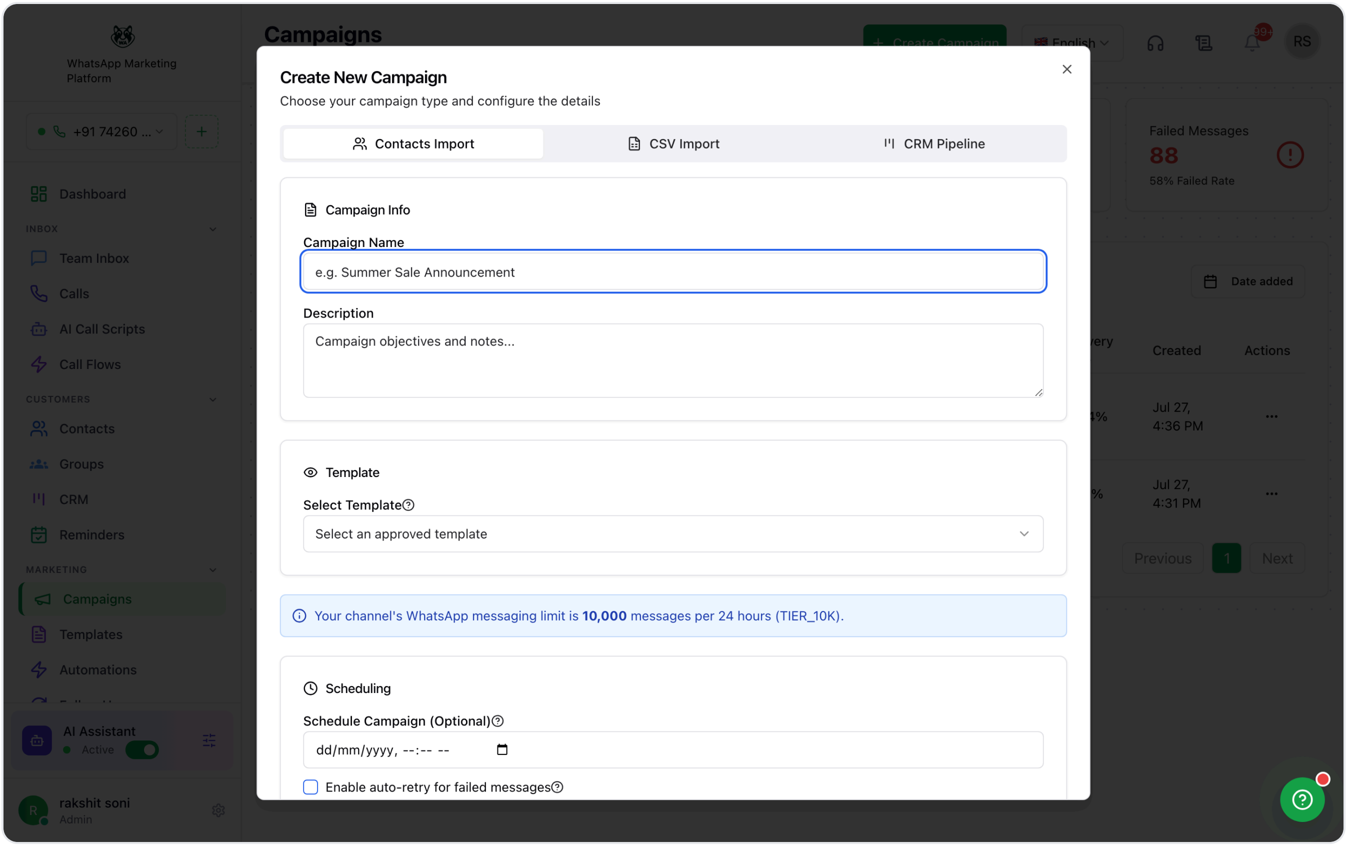
The Create Campaign dialog with three audience tabs and the Campaign Info card

1. **Name the campaign.** In the **Campaign Info** card, fill in **Campaign Name** (required) — an internal label only you and your team see, e.g. "Summer Sale Announcement". Add an optional **Description** for your own notes. Neither is sent to recipients.



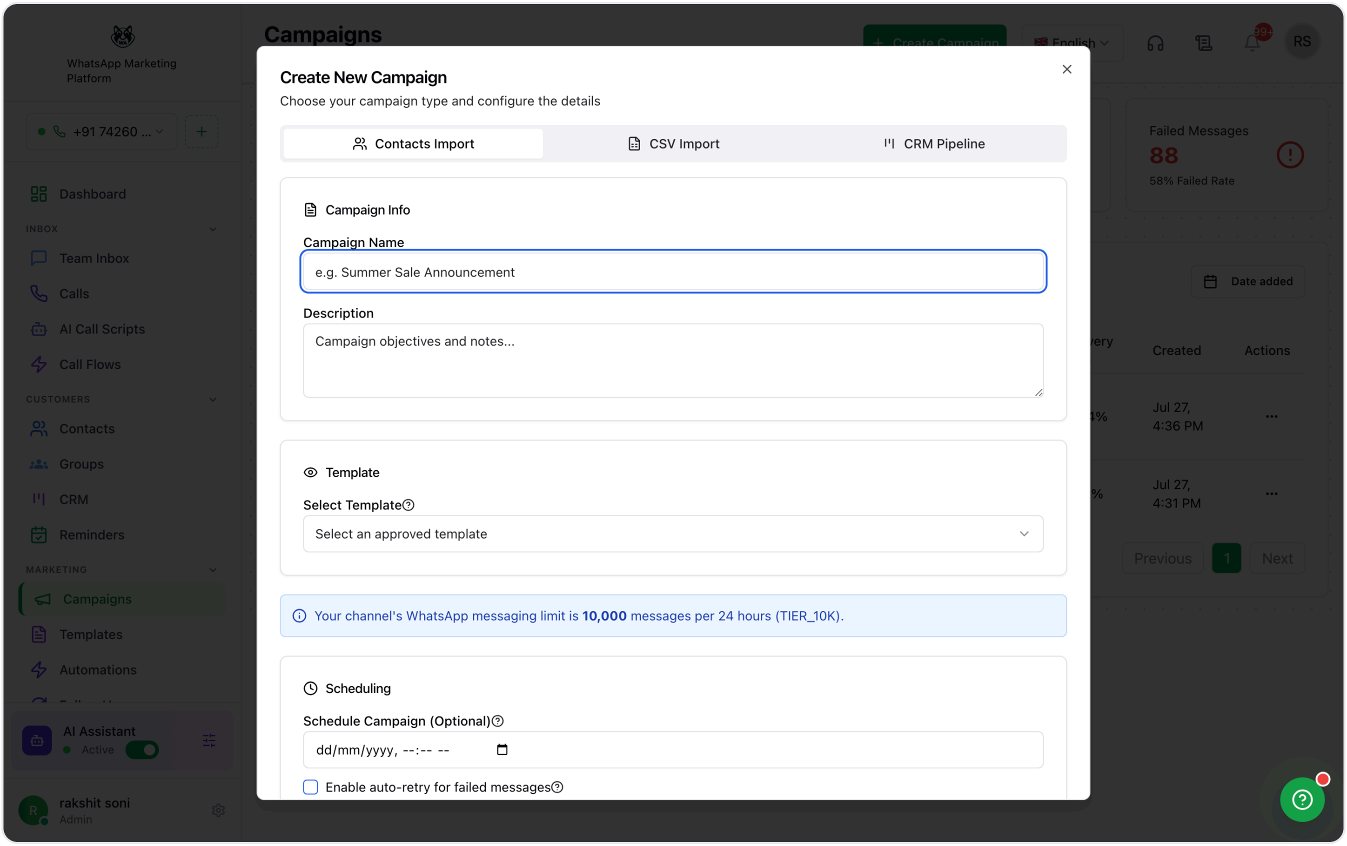
The Campaign Name and Description fields in the Campaign Info card

1. **Pick an approved template.** In the **Template** card, open **Select Template**. **Only APPROVED templates appear** — each entry shows the name and language, e.g. "order_update (en_US)". A **Preview** of the header, body and footer appears below so you can confirm it's the right one.



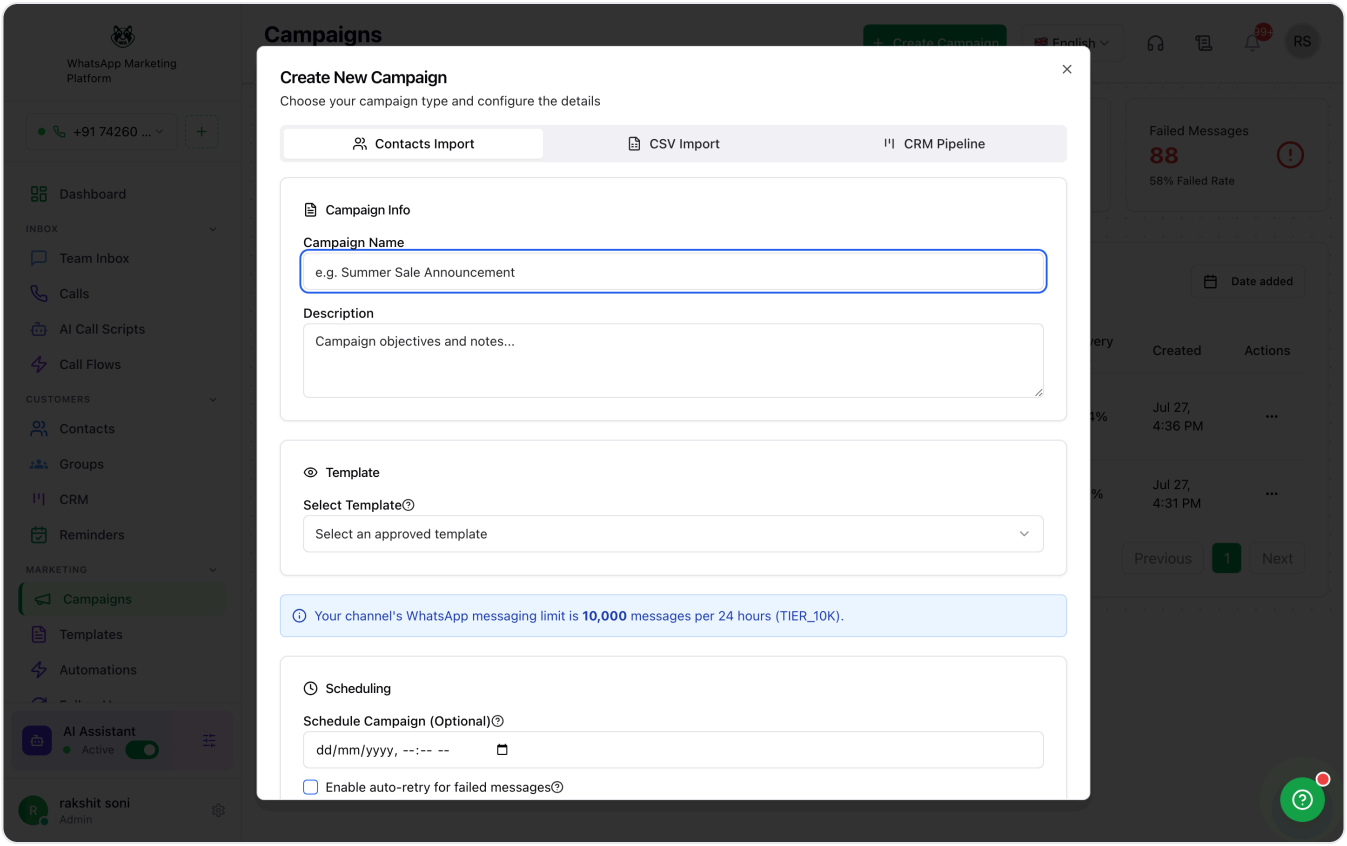
The Select Template dropdown and the preview showing body and footer

1. **Configure variables.** If the template needs input, a **Variable Configuration** card appears. For each `{{1}}`, `{{2}}` placeholder, pick a source from the dropdown: **Full Name**, **Phone Number**, **Custom Value** (one fixed text for everyone), or a **CSV Column** (CSV tab only). Any sample the template author set is shown as a reminder.



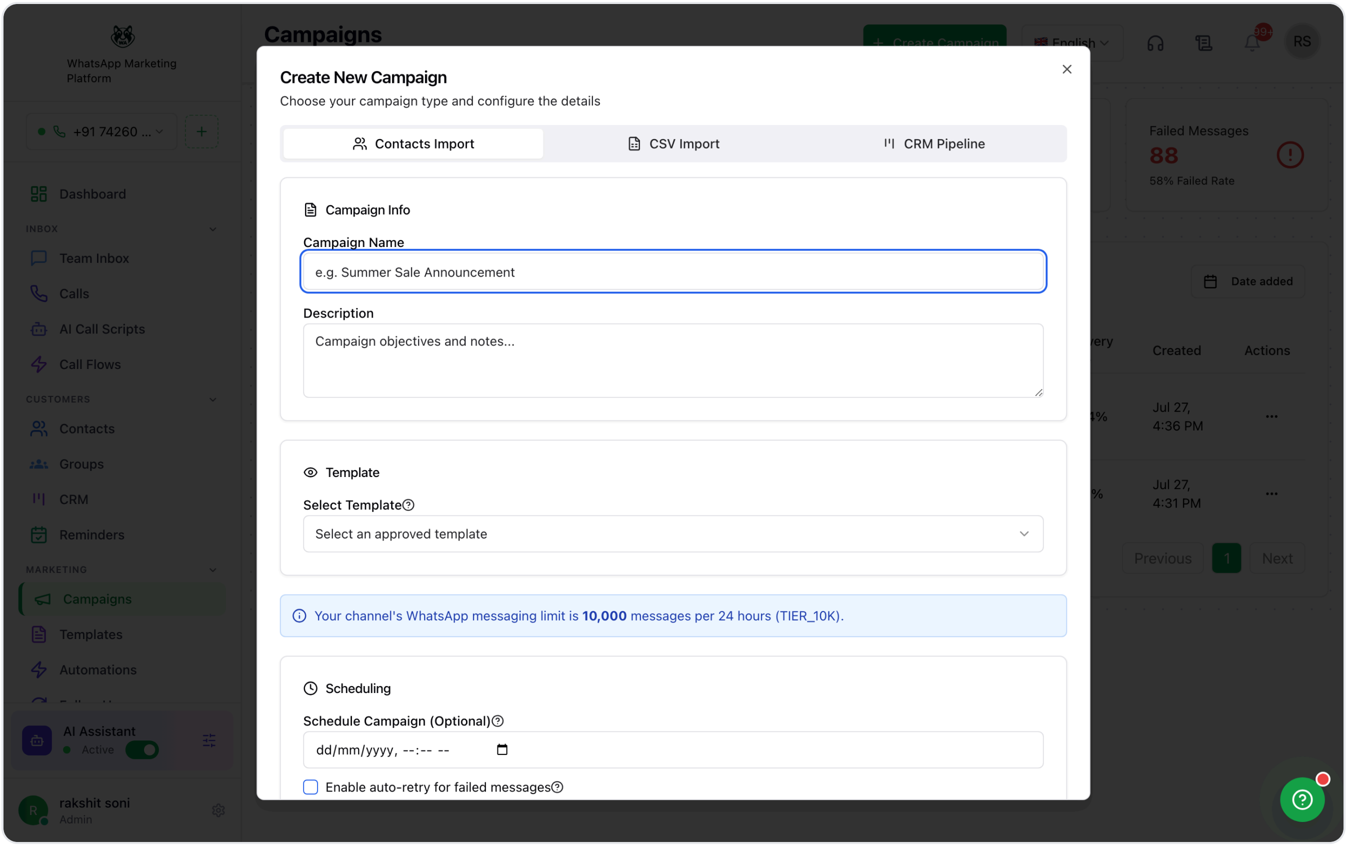
Per-variable dropdowns mapping {{1}} and {{2}} to Full Name and a Custom Value

1. **Upload the header media (if any).** If your template has an image/video/document header, a red-labelled **Upload Image / Upload Video / Upload Document** field appears in the same card. Choose the file — the same media goes to every recipient. A green "uploaded successfully" note confirms it.



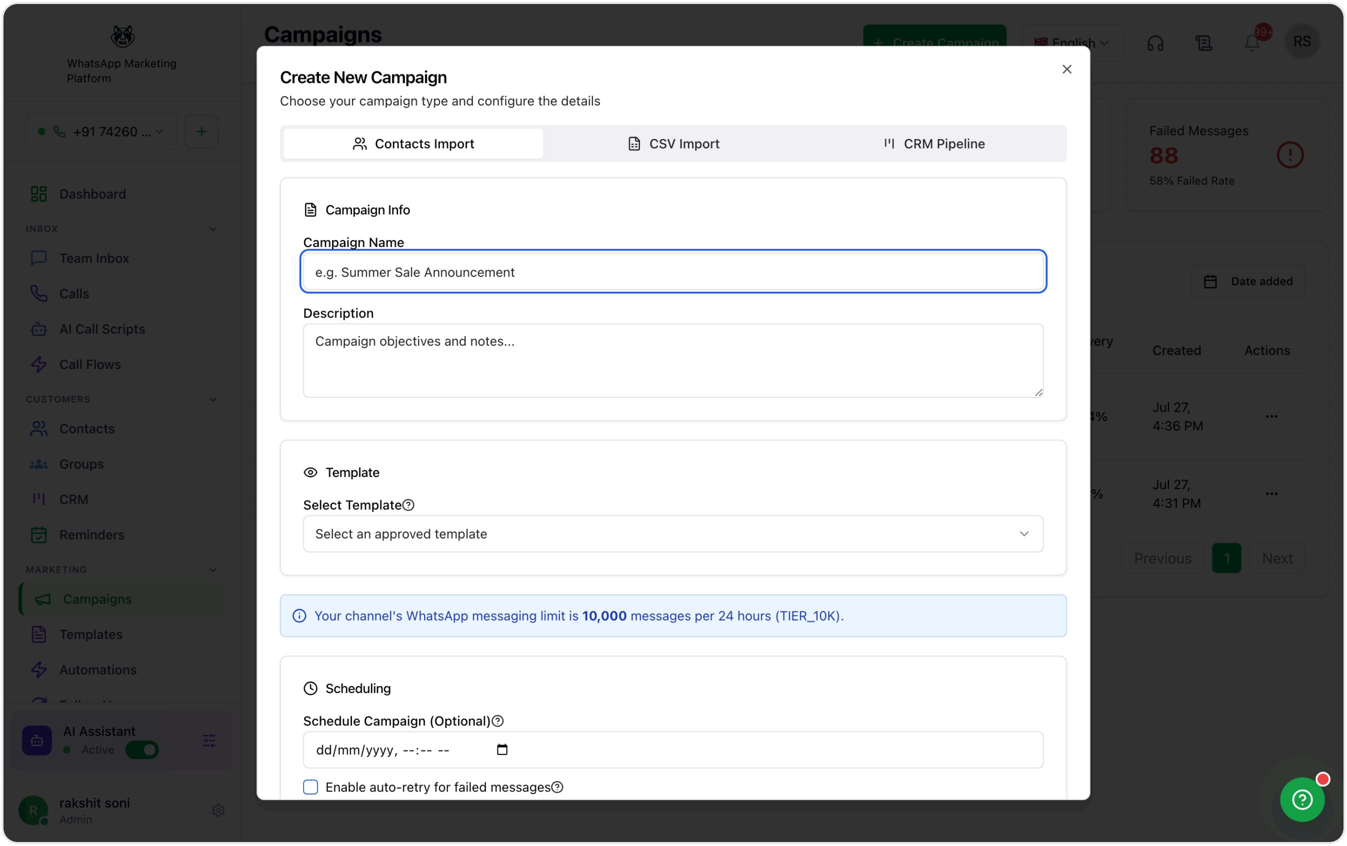
The Upload Image field with a green uploaded-successfully confirmation

1. **Choose your audience — Contacts.** On the **Contacts Import** tab, use the **group filter dropdown** ("All Contacts" or a specific group), or open the **Advanced Filter** for CRM stages, tags, and date added. Tick the contacts you want, or use **Select All (N)** to take the whole filtered list.



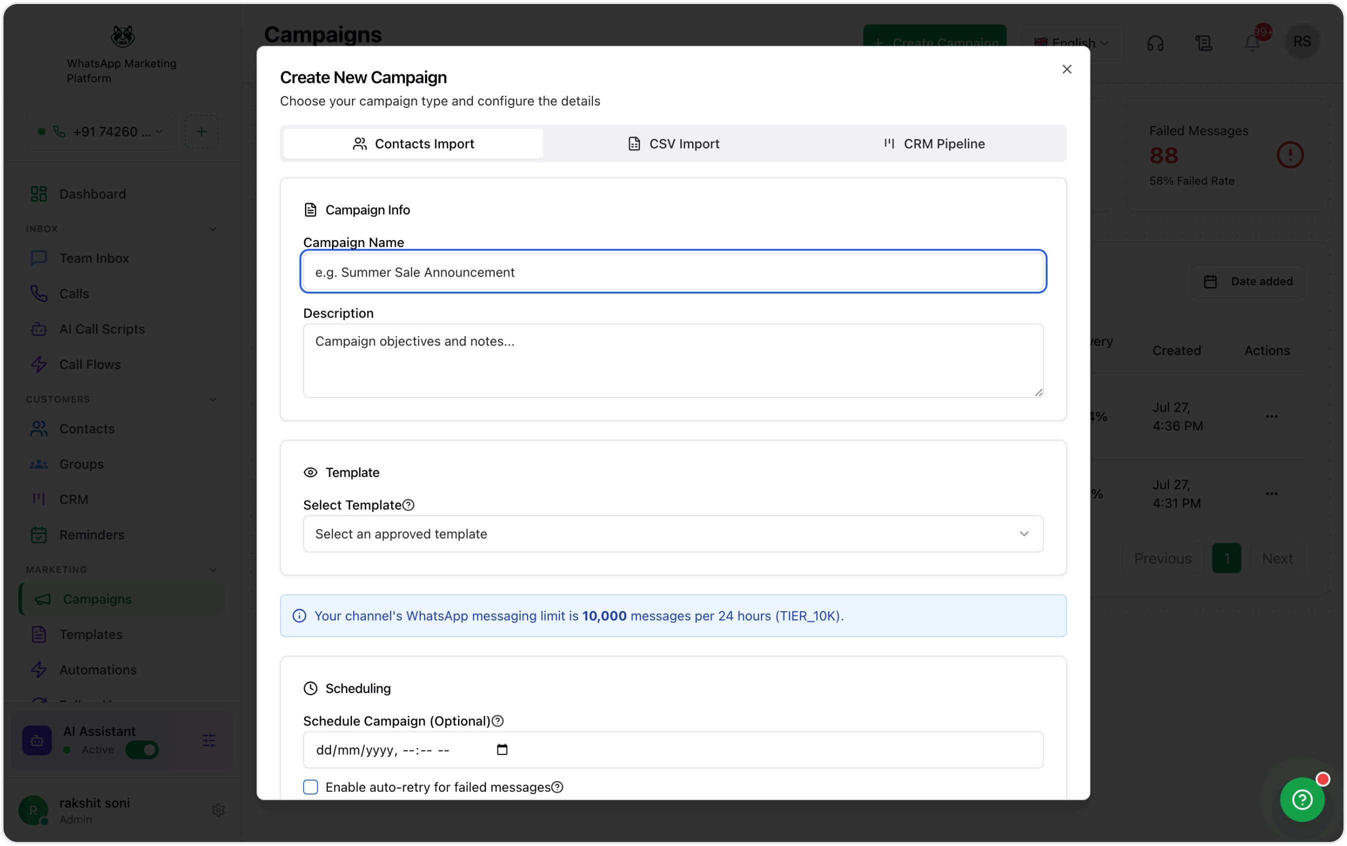
The Contacts tab — group dropdown, Advanced Filter button, and checkboxed contact list

1. **Or upload a CSV.** On the **CSV Import** tab, click **Upload CSV File** and choose a `.csv`. Use **Download Sample CSV** for the correct format — every row needs a `phone` column in international format (e.g. `+14155551234`). The first 5 rows and the total count preview so you can confirm the columns parsed, and each column becomes a mapping option above.



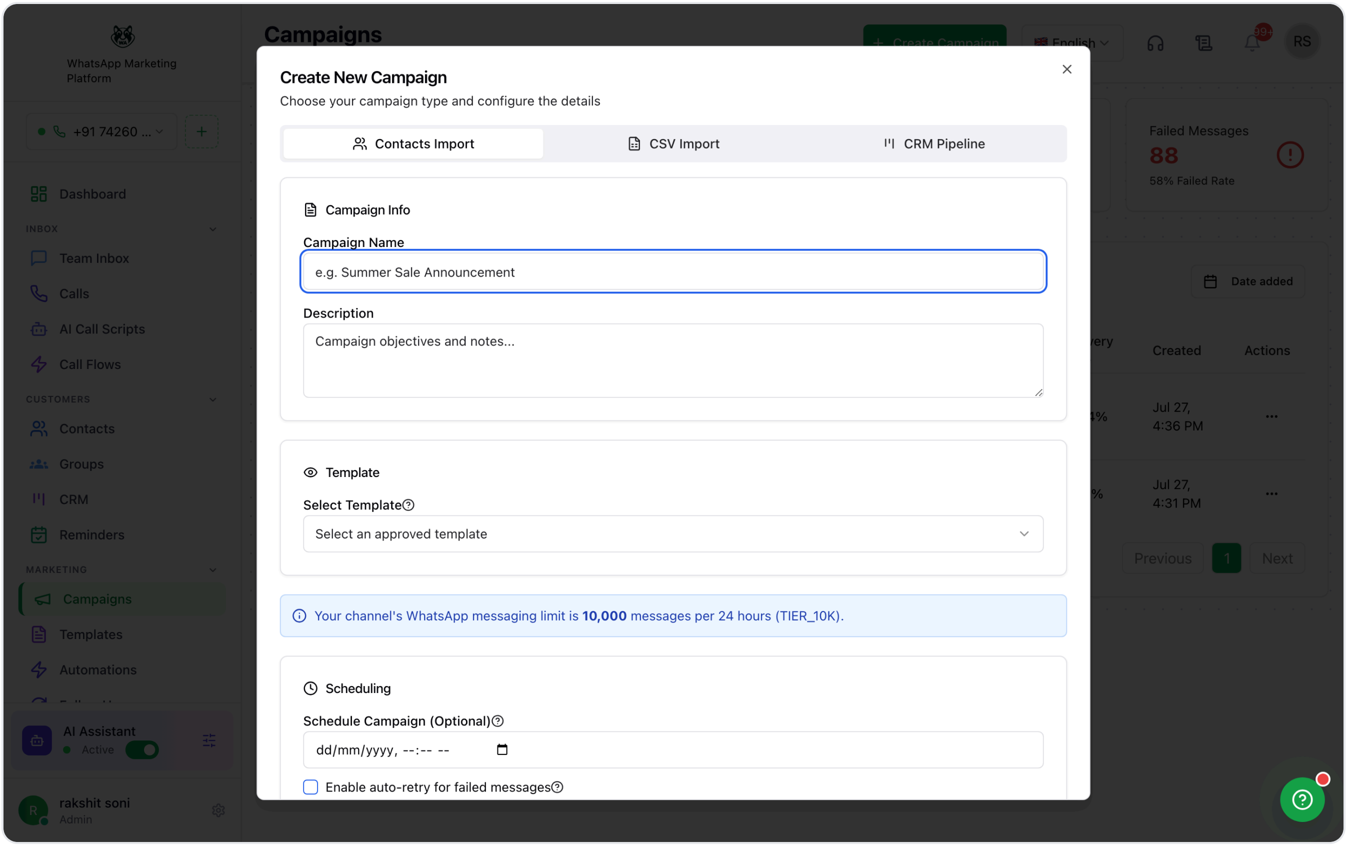
The CSV tab — Upload CSV File, Download Sample CSV link, and a preview of the first rows

1. **Or pick a CRM stage.** On the **CRM Pipeline** tab, choose **Select Board**, then **Select Stage** (each stage shows its contact count). Keep **Avoid duplicates** on so people you've already selected aren't re-added, then tick individuals or **Select All (N)**.



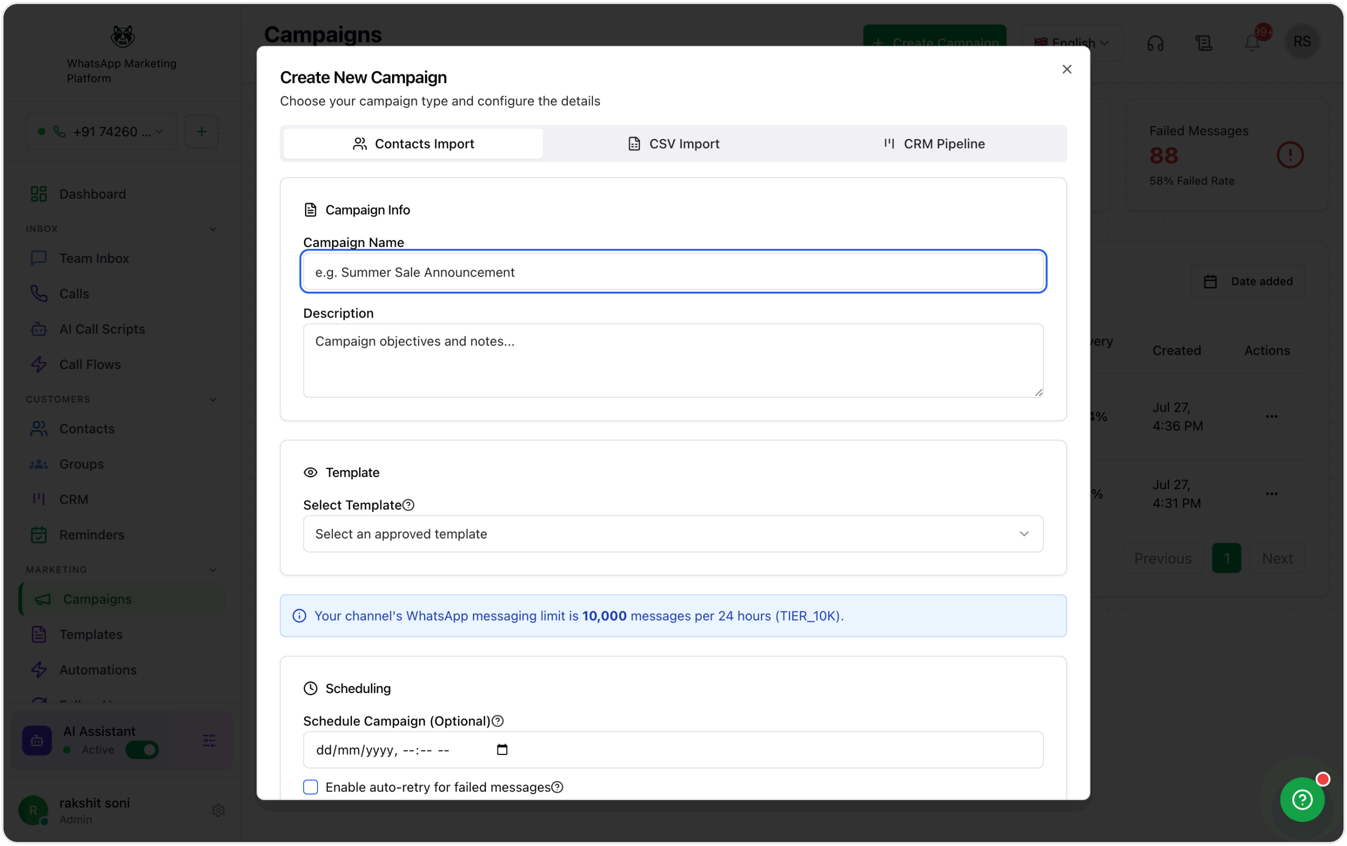
The CRM tab — Select Board and Select Stage dropdowns with the Avoid duplicates checkbox

1. **Set the schedule (optional).** In the **Scheduling** card, leave **Schedule Campaign (Optional)** empty to send now, or pick a future date/time (in your browser's time zone) to schedule. Tick **Enable auto-retry for failed messages** to have transient failures retried automatically.



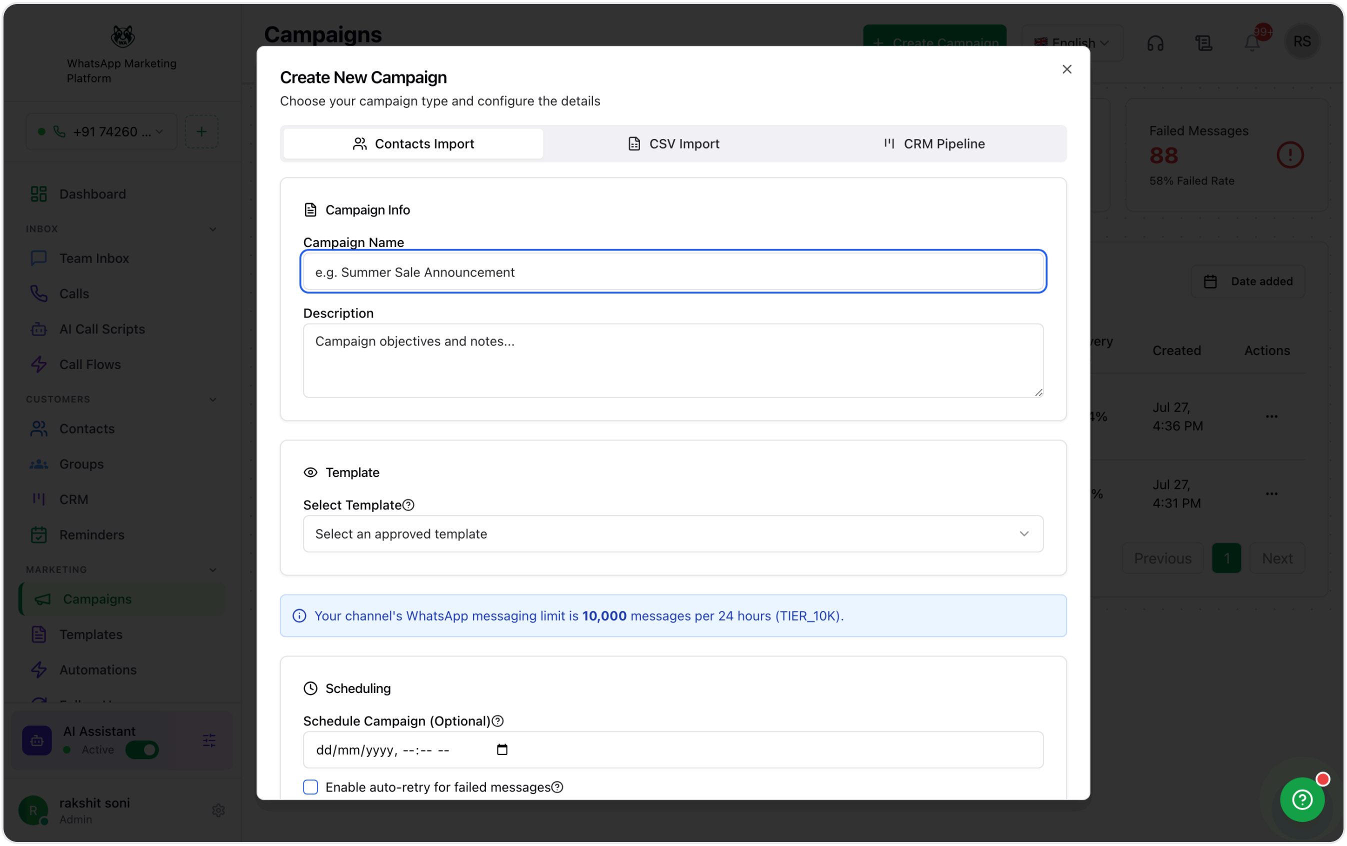
The date/time picker and the Enable auto-retry for failed messages checkbox

1. **Add follow-up actions (optional).** Turn on **Group Actions** to **Add into Groups** / **Remove from Groups** after the send, or **Kanban / CRM Actions** to move recipients to a board stage. A blue banner nearby shows your channel's **24-hour messaging limit** — selecting more recipients than your tier allows blocks the send.



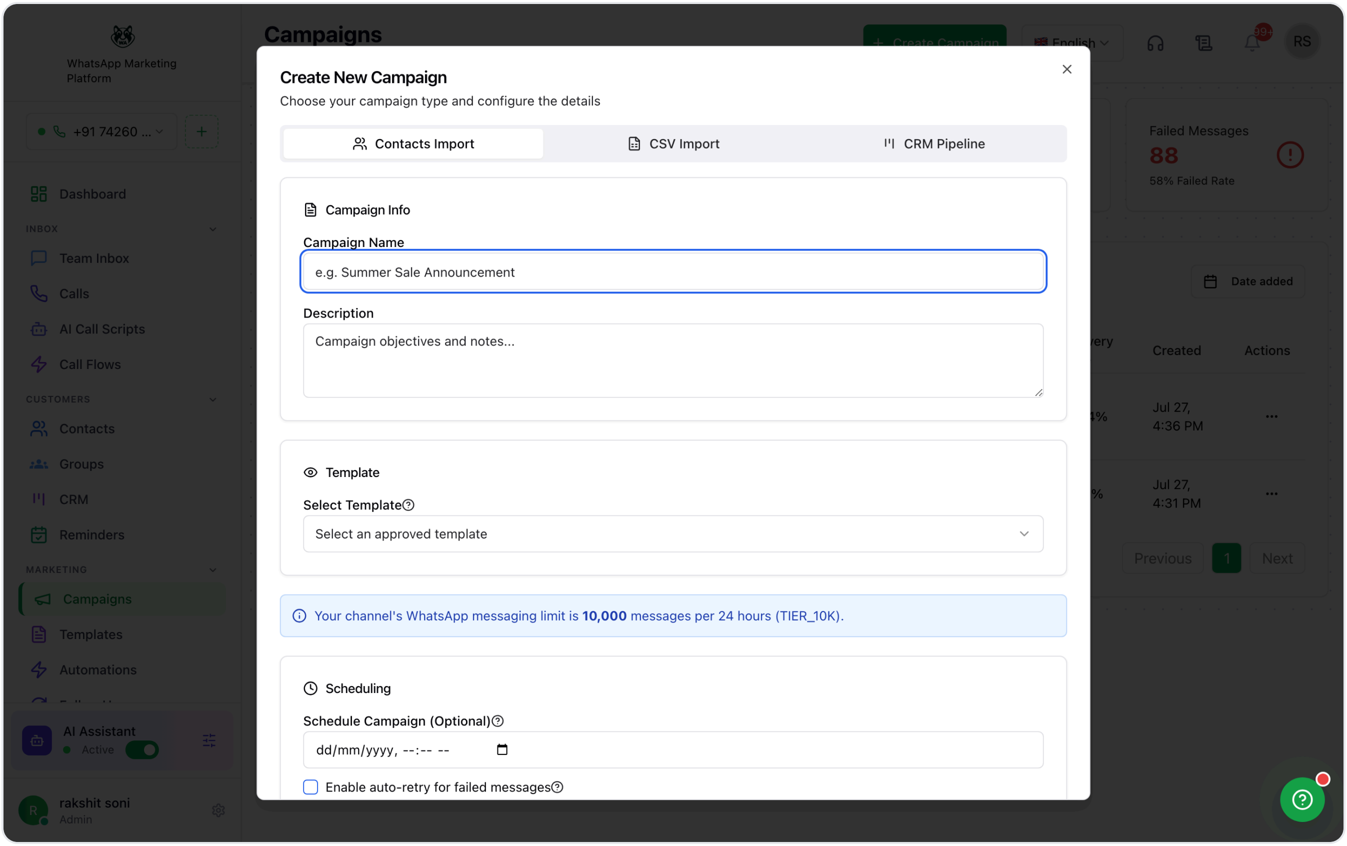
The Group Actions toggle with Add into / Remove from Groups options and the messaging-limit banner

1. **Launch it.** Click the primary button at the bottom — it reads **Start Campaign** (immediate) or **Schedule Campaign** (if you set a time). the platform runs the variable check, the CSV phone check, and the messaging-limit check, then queues the messages.



The Start Campaign / Schedule Campaign button at the bottom of the dialog

1. **Track it in Analytics.** Back on the Campaigns list, open your campaign to watch each recipient move through **pending → sent → delivered → read**. Use **View Details** to see the per-recipient table, and **Resend to subset** to retarget just the Failed (or Sent/Delivered/Read) recipients with the same template.



The campaign analytics page — delivery counts and the per-recipient status table

Tips

- **One tab per campaign.** You can't mix Contacts + CSV in a single send — create separate campaigns or move people into a common group/stage first.
- **Blocked or unsubscribed contacts are excluded automatically.** If any were skipped, a notice tells you how many.
- **Never leave a variable blank.** the platform blocks the campaign if anything is unmapped, because empty values make Meta reject *every* message — this guard saves thousands of doomed sends.
- Your messaging limit grows automatically as your WhatsApp number builds a good sending reputation.

FAQ

Q: Why can't I select my template?

A: Only **approved** templates for your active channel appear in the list. Anything Pending, Rejected, or on a different channel is hidden — check the Templates page.

Q: What happens after I start a campaign?

A: Messages are queued and sent in the background through the WhatsApp Cloud API. Each recipient moves through pending → sent → delivered → read, which you watch on the campaign's analytics page.

Q: Some messages failed — can I resend?

A: Yes. Open the campaign in **Analytics → View Details**, then use **Resend to subset** to create a new campaign targeting just the Failed recipients, reusing the same template and settings.

Q: Can I schedule for a specific customer's time zone?

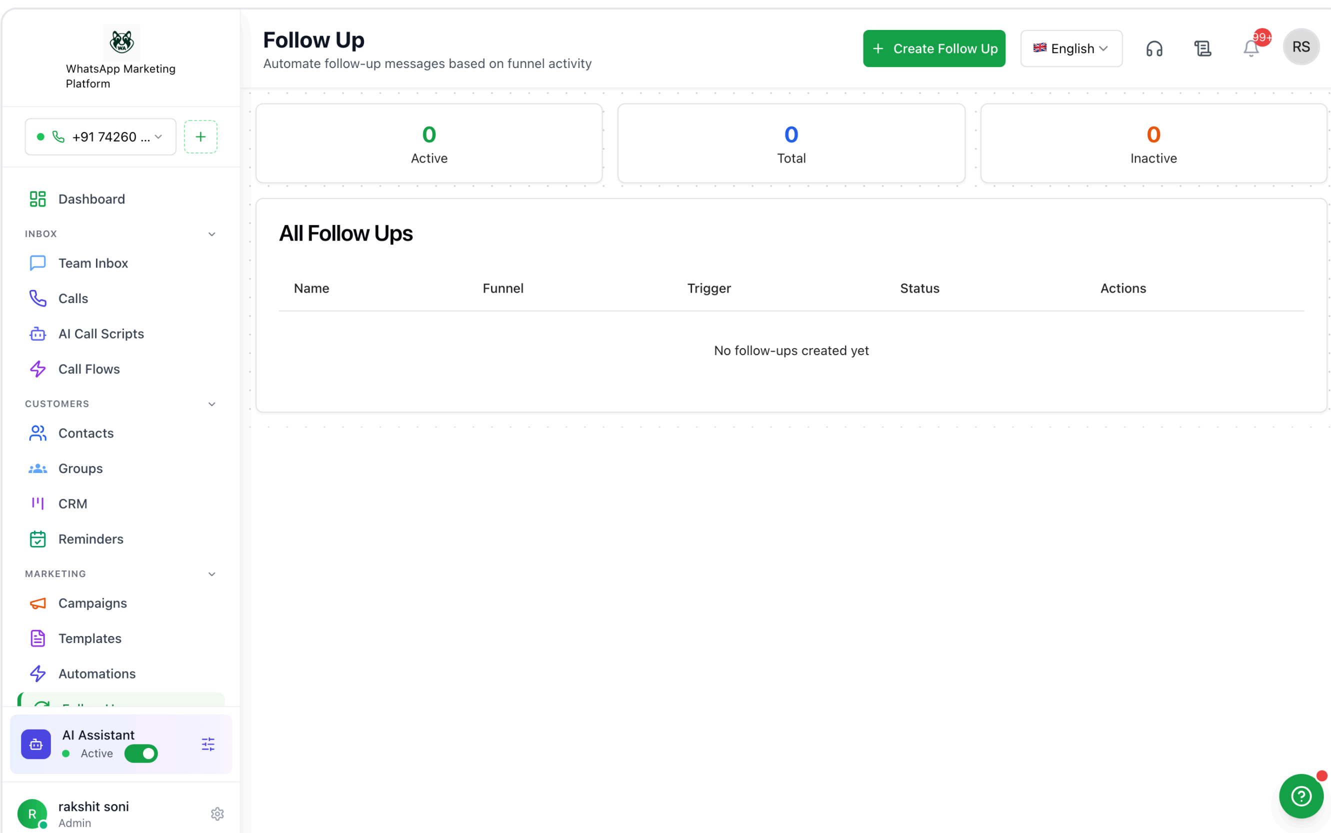
A: The scheduled time uses your browser's local time zone. Set the date/time accordingly, and the platform starts the send automatically at that moment.

Follow-ups

A follow-up is an automated message rule tied to a **funnel** — a contact **Group** or a **CRM stage**. When contacts enter or leave that funnel, the platform schedules an approved WhatsApp template to go out to them, either immediately, after a delay, or on a repeating schedule. Open it from **Follow Up** in the left sidebar.

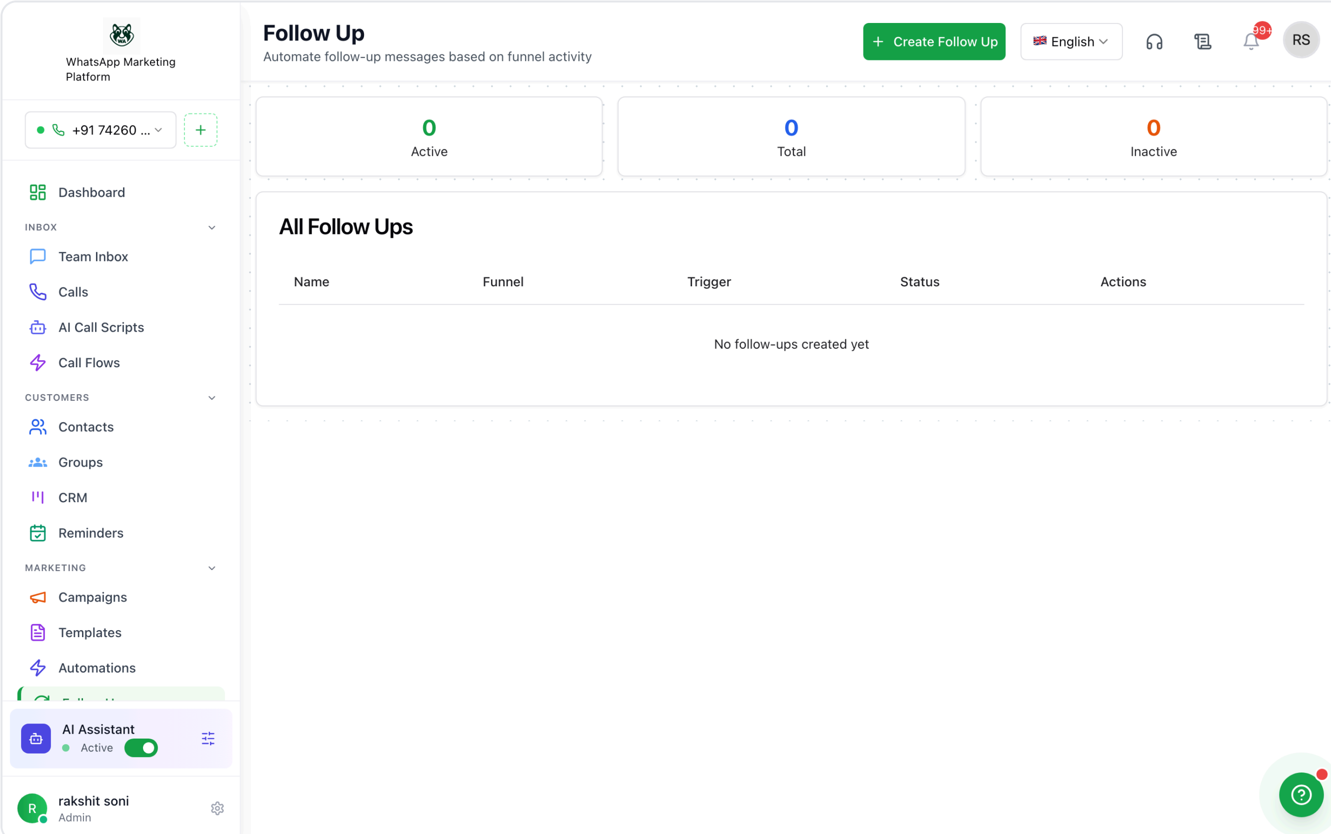
How to use (step by step)

1. **Open the Follow Up page.** Click **Follow Up** in the left sidebar. The top of the page shows counter cards for **Active**, **Total**, and **Inactive**, and below them a table of every rule with its funnel type, trigger, and an on/off switch on each row.



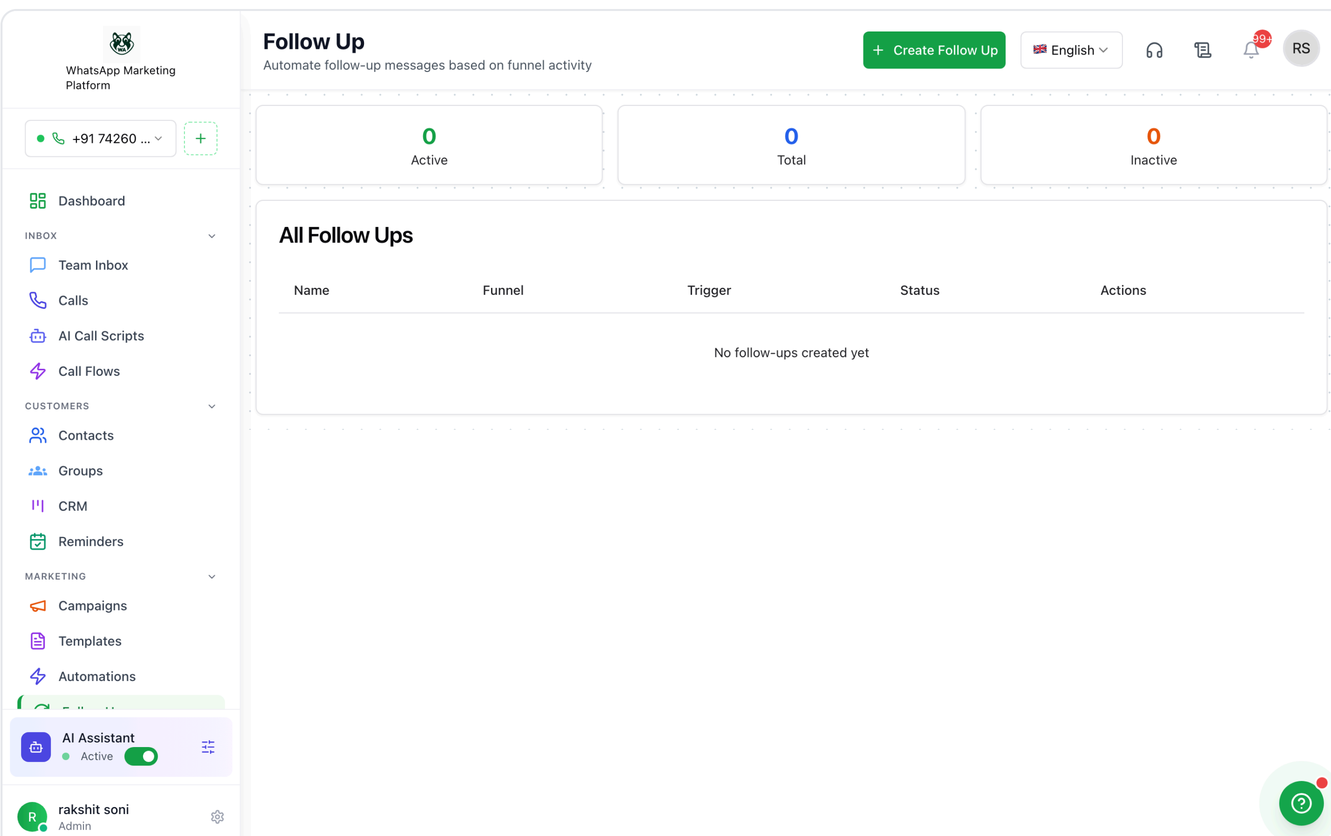
The Follow Up page: counter cards on top, rules table below

1. **Click Create to open the rule builder.** Use the **Create** button in the top-right corner. A large dialog opens with the rule laid out in stacked cards — Basic Info, Funnel Setting, Trigger Settings, Template, Actions, and Trigger Rules.



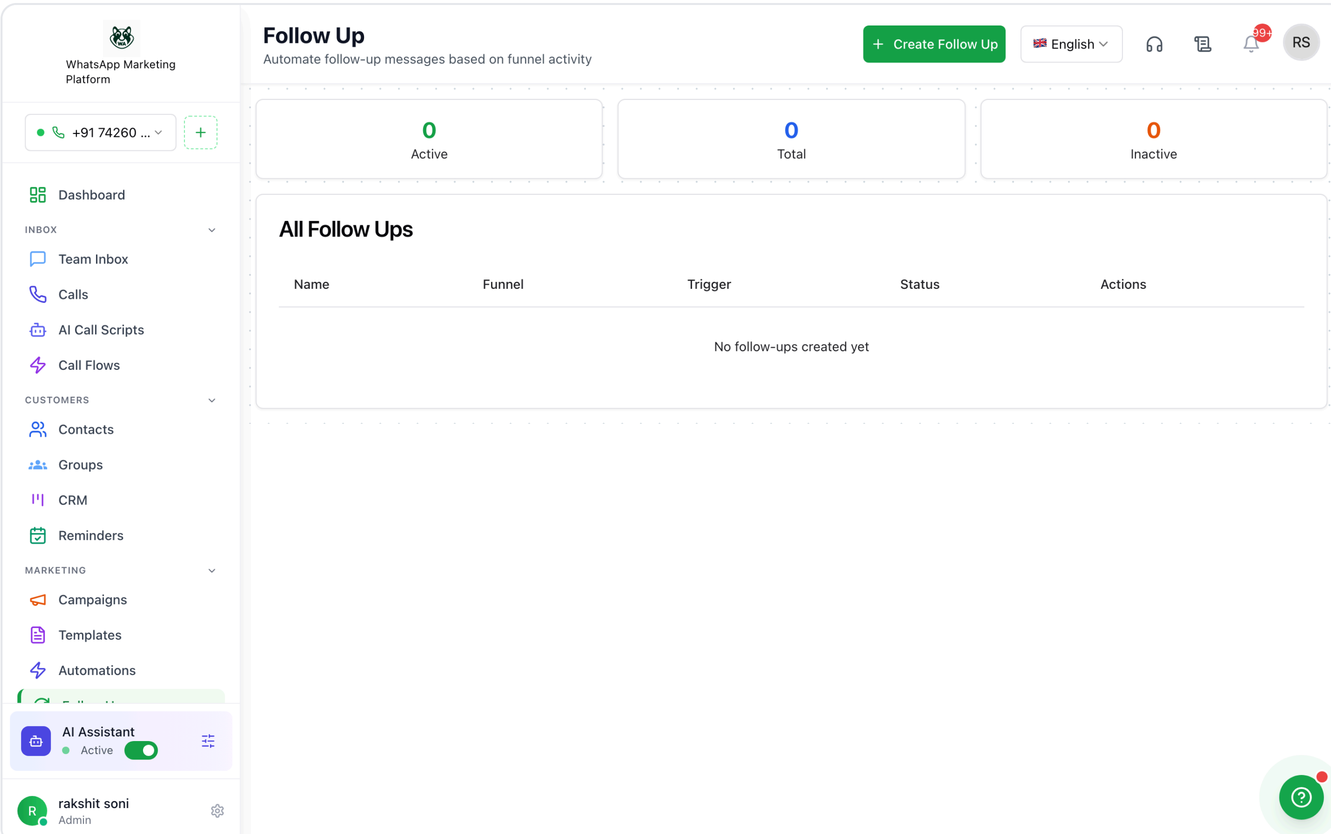
Click Create to open the follow-up rule builder dialog

1. **Name the rule.** In the **Basic Info** card at the top, type a clear **Name** (for example "Renewal reminder") in the text field so you can recognise it later in the table.



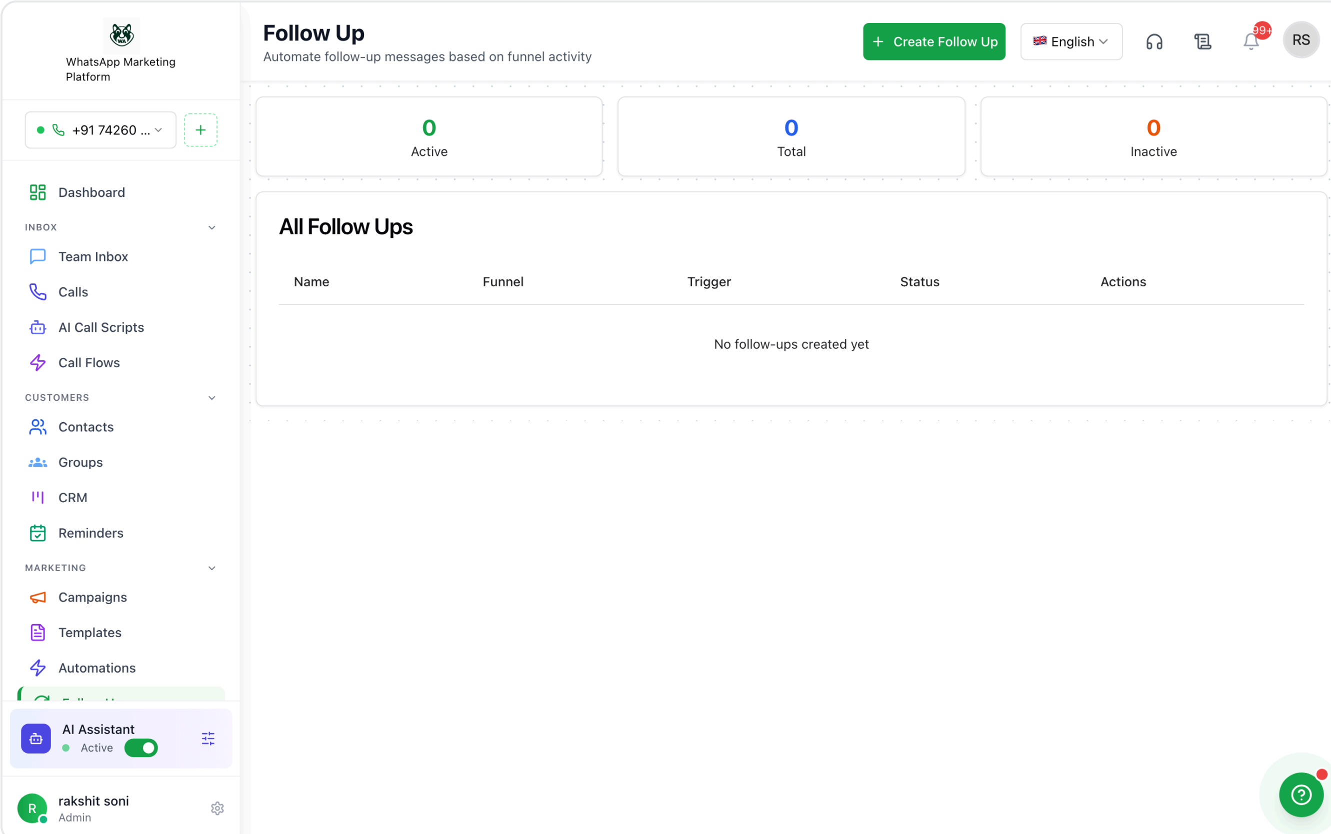
Give the rule a descriptive name

1. **Pick the funnel.** In the **Funnel Setting** card choose one of the two radio buttons: **Contact Group** or **CRM Stage**. For a group, pick it from the **Select Group** dropdown. For CRM, first pick the **Board**, then the **Stage** dropdown appears.



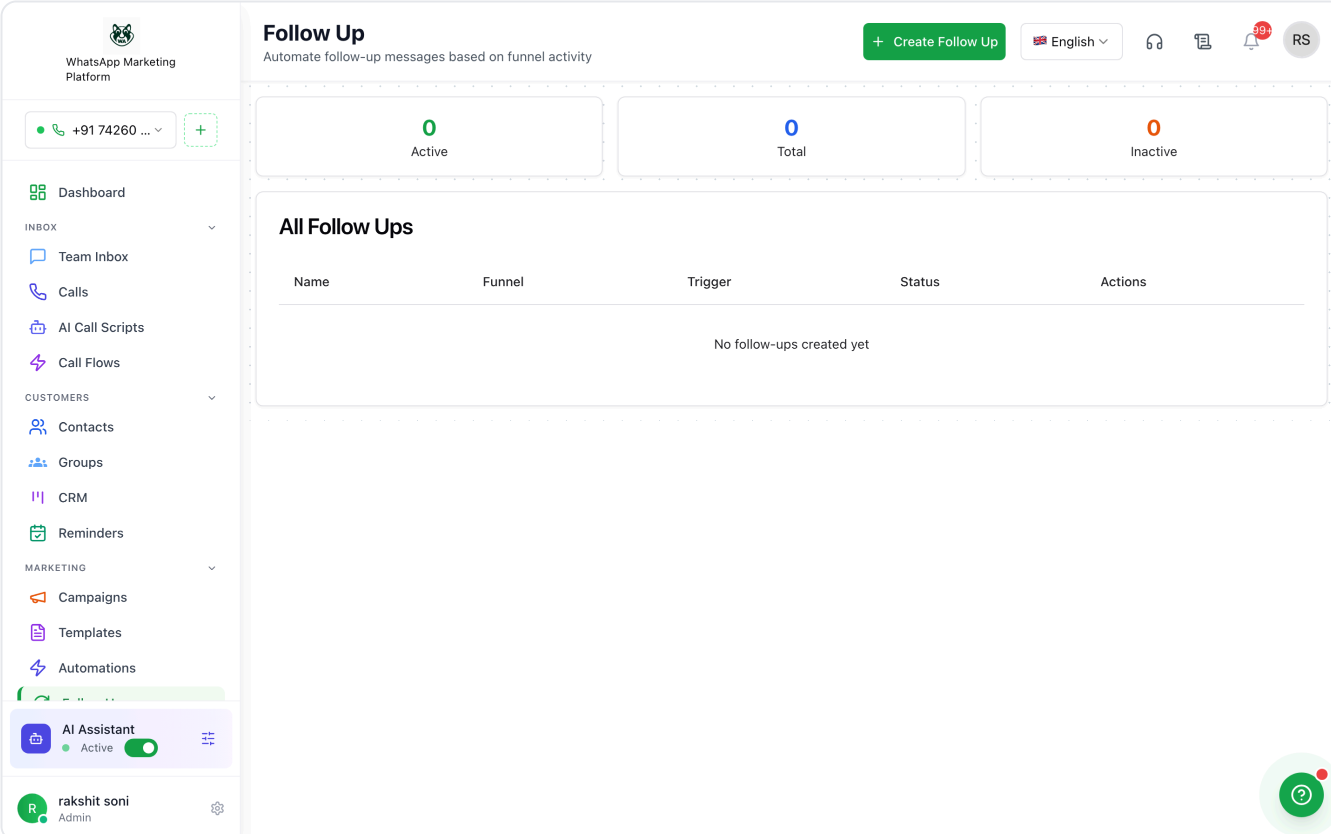
Choose a contact Group or a CRM board + stage as the funnel

1. **Choose the trigger.** In the **Trigger Settings** card open the **Trigger Type** dropdown and pick one: *On Enter* / *On Leave* fire immediately, *Delay after enter* / *Delay after leave* fire after a wait (set the number and unit — seconds/minutes/hours/days), and *Scheduled after enter* / *Scheduled after leave* send on a repeating daily/weekly/monthly schedule at a time and timezone you choose.



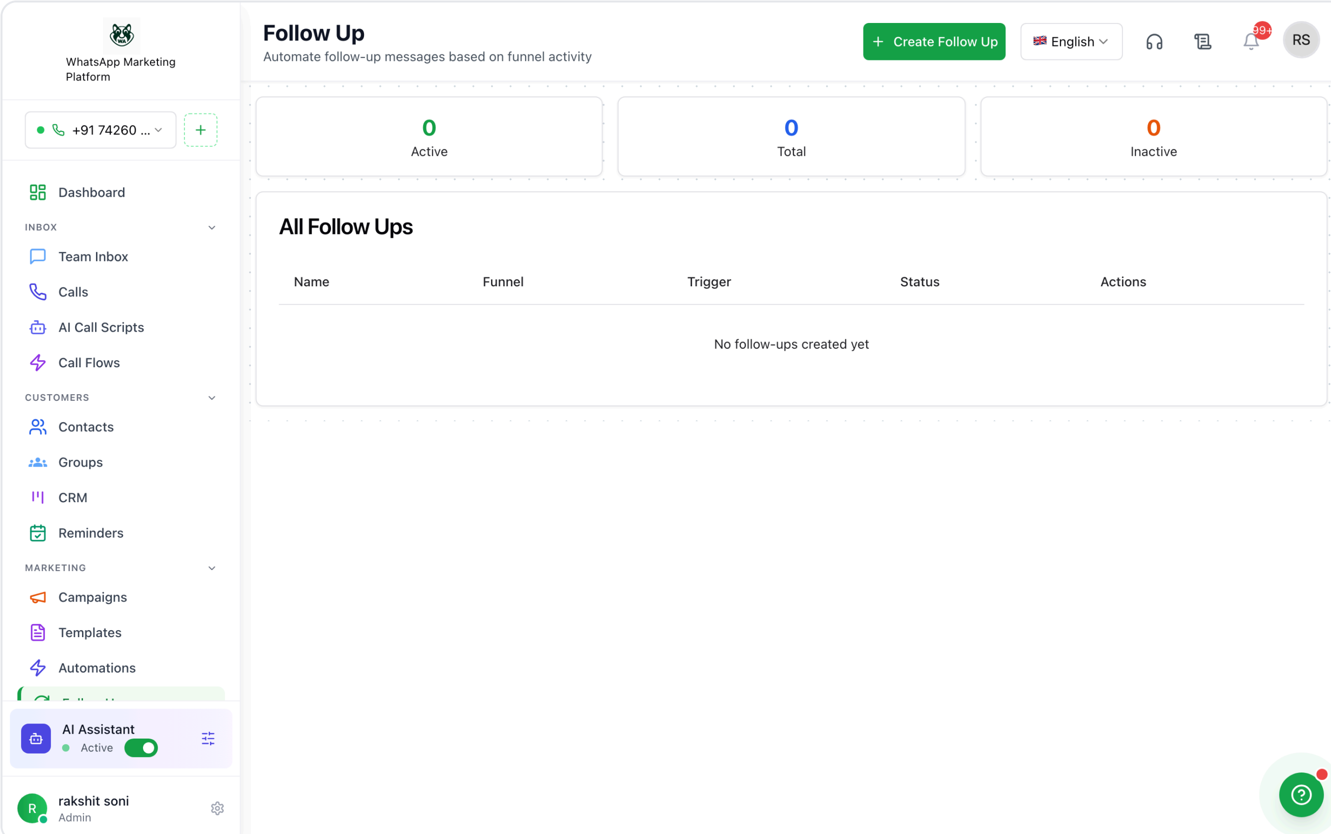
Pick when the follow-up fires: on enter/leave, delayed, or scheduled

1. **Select the template and map variables.** In the **Template** card open **Select Template** (only APPROVED templates appear). If the template has variables like `{{1}}`, a mapping row appears for each — set it to **Name**, **Phone**, **Email**, or **Custom** (type a custom value). If the template has an image, video, or document header, an upload field appears too.



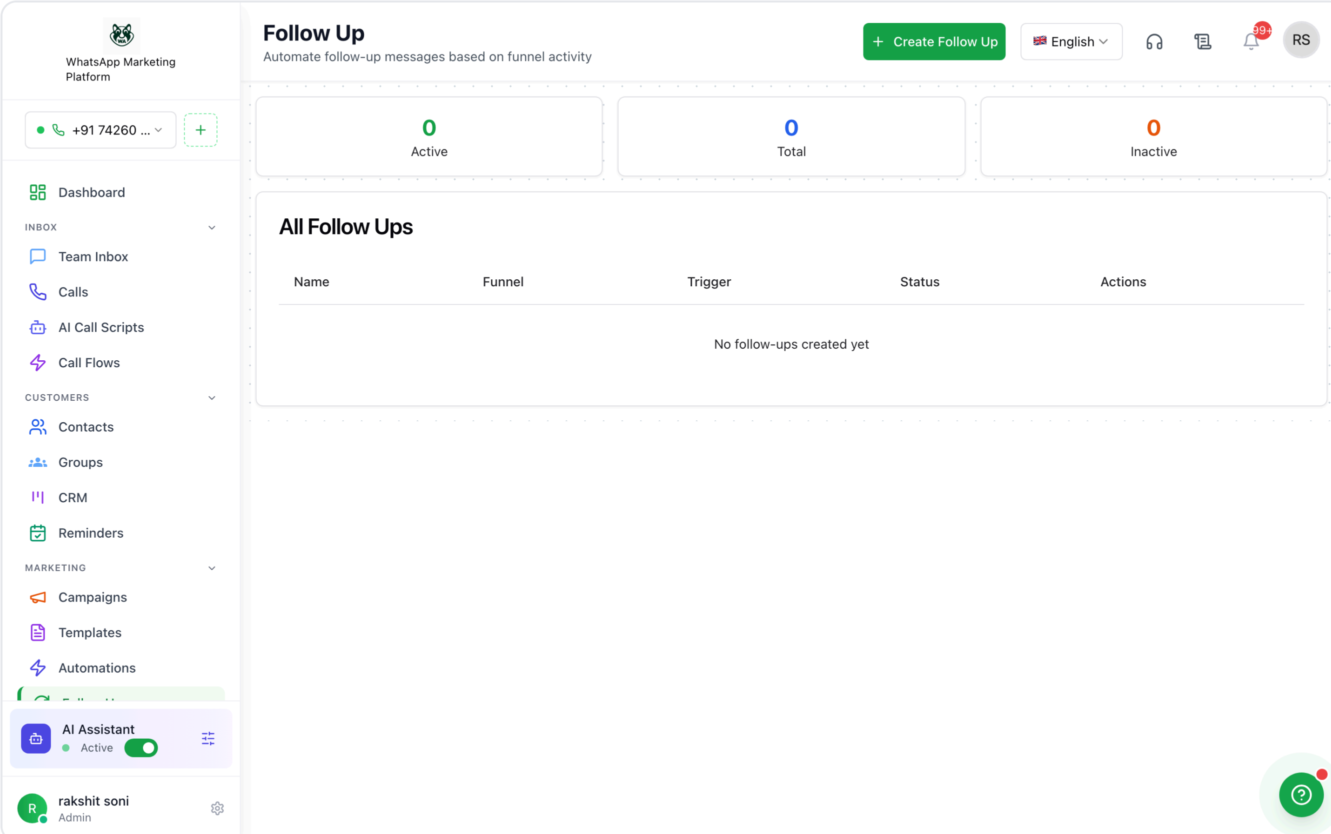
Choose the approved template and map each {{variable}}

1. **Add optional actions.** Below the template, the **Group Actions** and **Kanban Actions** cards let you toggle switches to add or remove the contact from groups or move them between CRM stages when the rule fires.



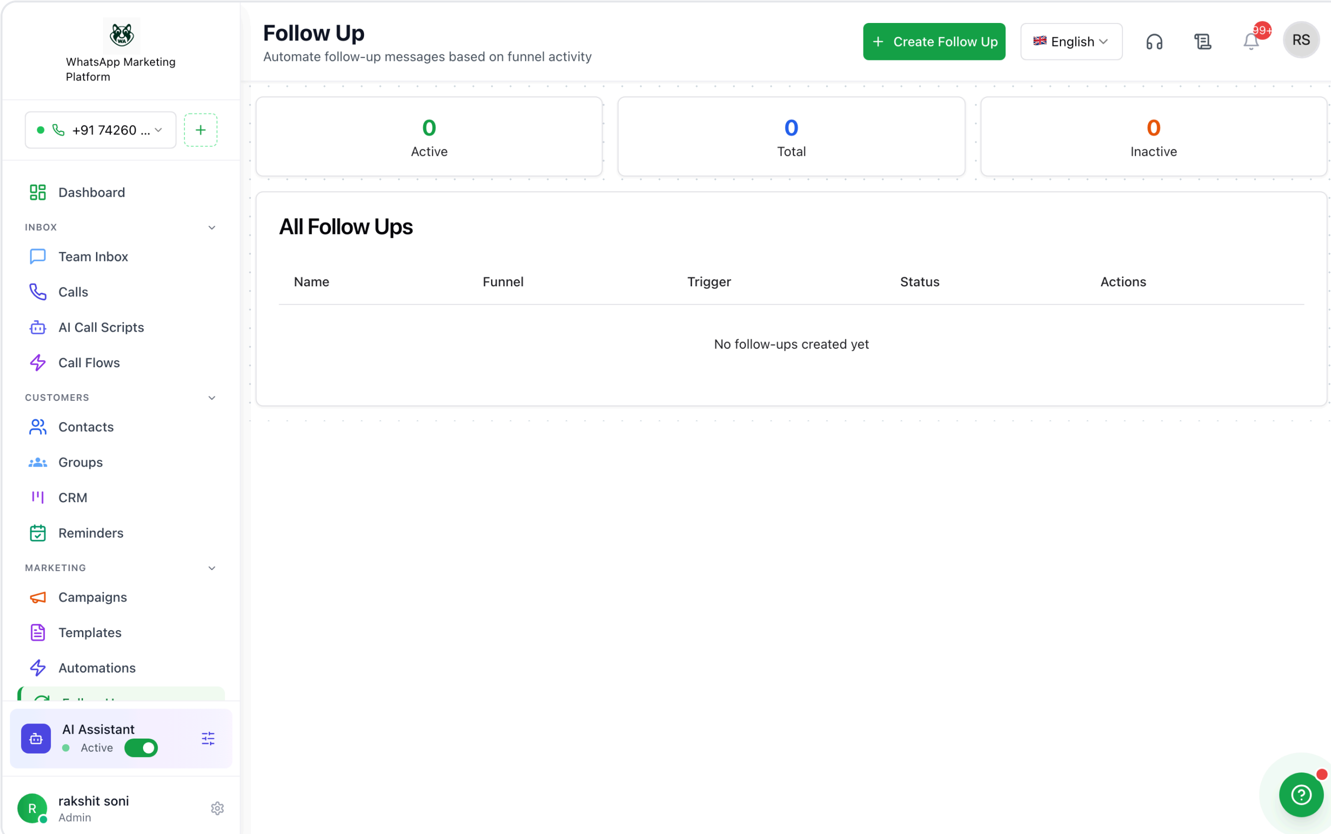
Optionally add/remove groups or change CRM stage when the follow-up runs

1. **Set cancel-on-reply and save.** In the **Trigger Rules** card turn on the **Cancel on reply** switch if you want the follow-up cancelled the moment the contact replies. Then click the **Create** button at the bottom of the dialog. Back in the table, flip the rule's row **switch on** to make it live.



Toggle Cancel on reply, save, then switch the rule on

1. **Watch the Follow-Up Queue.** Open **Follow-Up Queue** in the sidebar to see every scheduled message. A counter strip shows **Pending**, **Processing**, **Sent today**, **Failed**, and **Cancelled today**. On each row you can **Send now** or **Cancel** a pending message, **Retry** a failed one, or **Open contact** in the Inbox. Select several rows for bulk actions, or export the visible list with **CSV**.



Monitor and control scheduled sends in the Follow-Up Queue

Tips

- To enrol specific people by hand, click the **Enrol** (person-plus) icon on a rule's row, search contacts by name or phone, and optionally turn on a **custom send time** (for example a customer's renewal date). Contacts already in the queue are skipped automatically.
- Use the **Duplicate** (copy) icon to clone a rule into a "(Copy)". The copy is always created **inactive** so you can tweak it before enabling.
- Cancel and Send now only work on **pending** rows; Retry only works on **failed** rows. A bulk action on ineligible rows is safely skipped with a notice.
- Only WhatsApp templates in **APPROVED** status appear in the template picker — get your template approved first.

FAQ

Q: Why does the queue look empty right after I enrolled someone?

A: The message may already have been sent. Turn on the **Sent** status filter and set the date preset to **All dates** to see it.

Q: Can I send a follow-up on a specific date for one contact?

A: Yes. When you enrol the contact, turn on **custom send time** and pick the exact date and time.

Q: Will the same contact ever get enrolled twice in one rule?

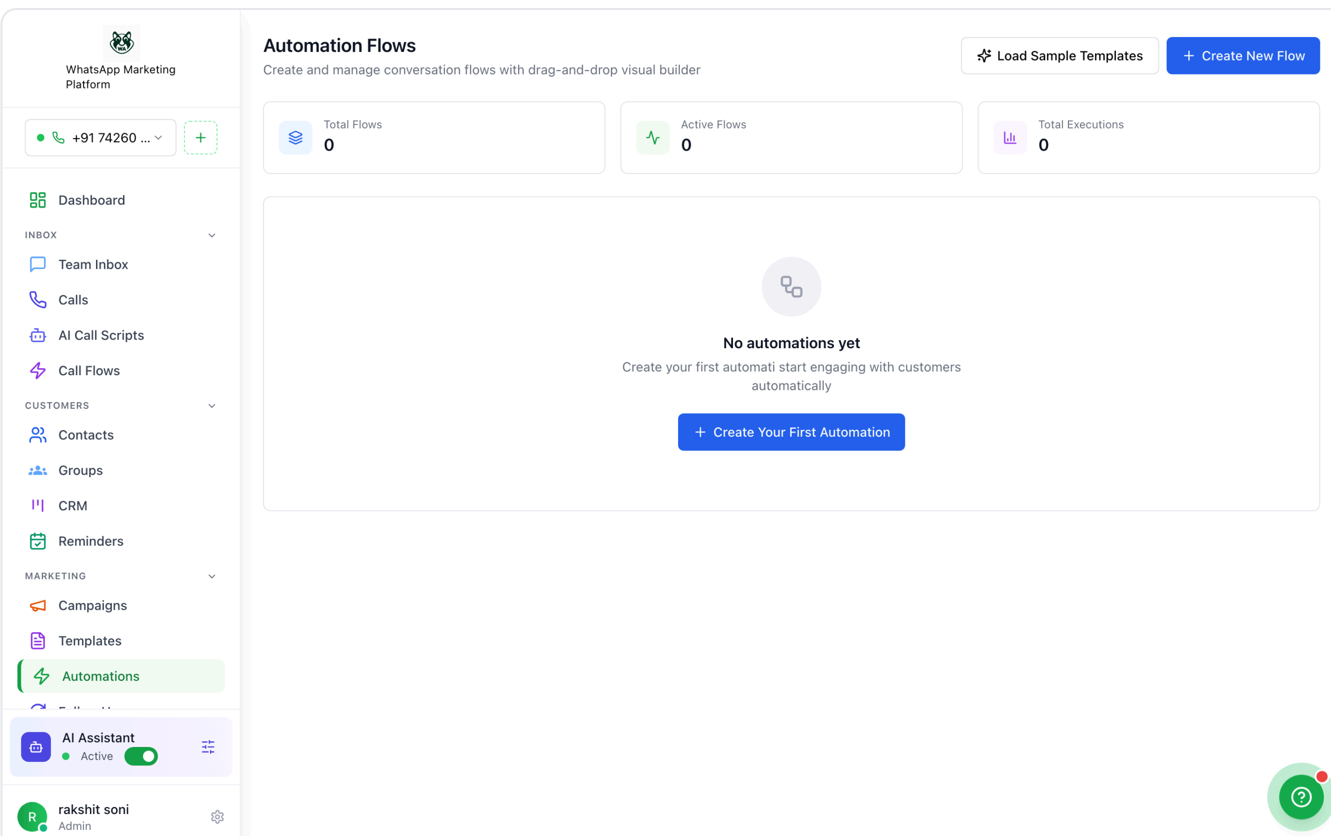
A: No. Contacts already in that rule's queue are skipped when new ones are enrolled.

Automation flow builder

Automations are WhatsApp conversation flows that run by themselves. In a visual builder you connect a **trigger** (something a customer does) to a sequence of **action nodes** — send a message, ask a question, branch on a condition, add to a group, fire a webhook, and more. Open it from **Automations** in the left sidebar (the page is titled *Automation Flows*). Each flow belongs to your currently active WhatsApp channel.

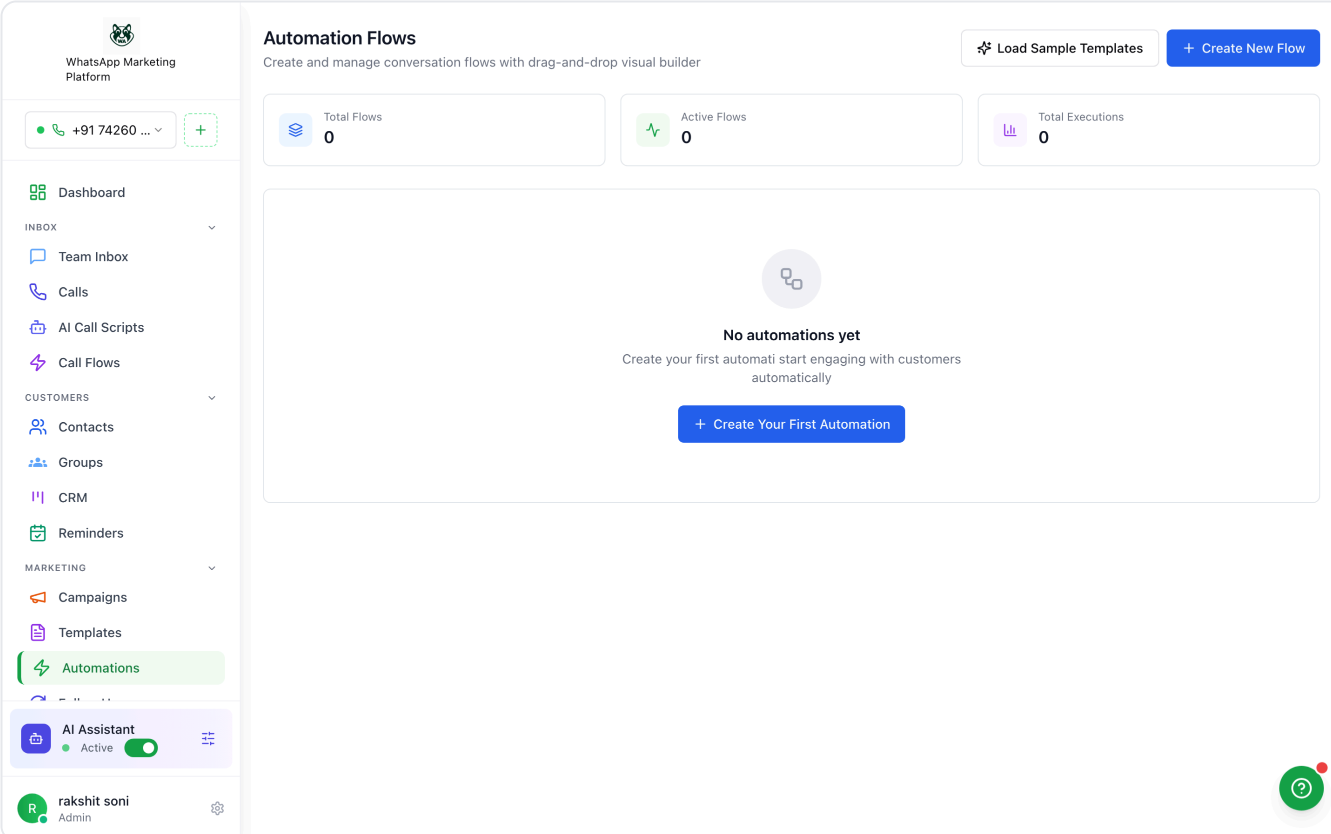
How to use (step by step)

1. **Open the Automations page.** Click **Automations** in the left sidebar. At the top you'll see counter tiles for **Total Flows**, **Active Flows**, and **Total Executions**, and below them a card for each flow showing its status dot, trigger, node/edge counts, and run count.



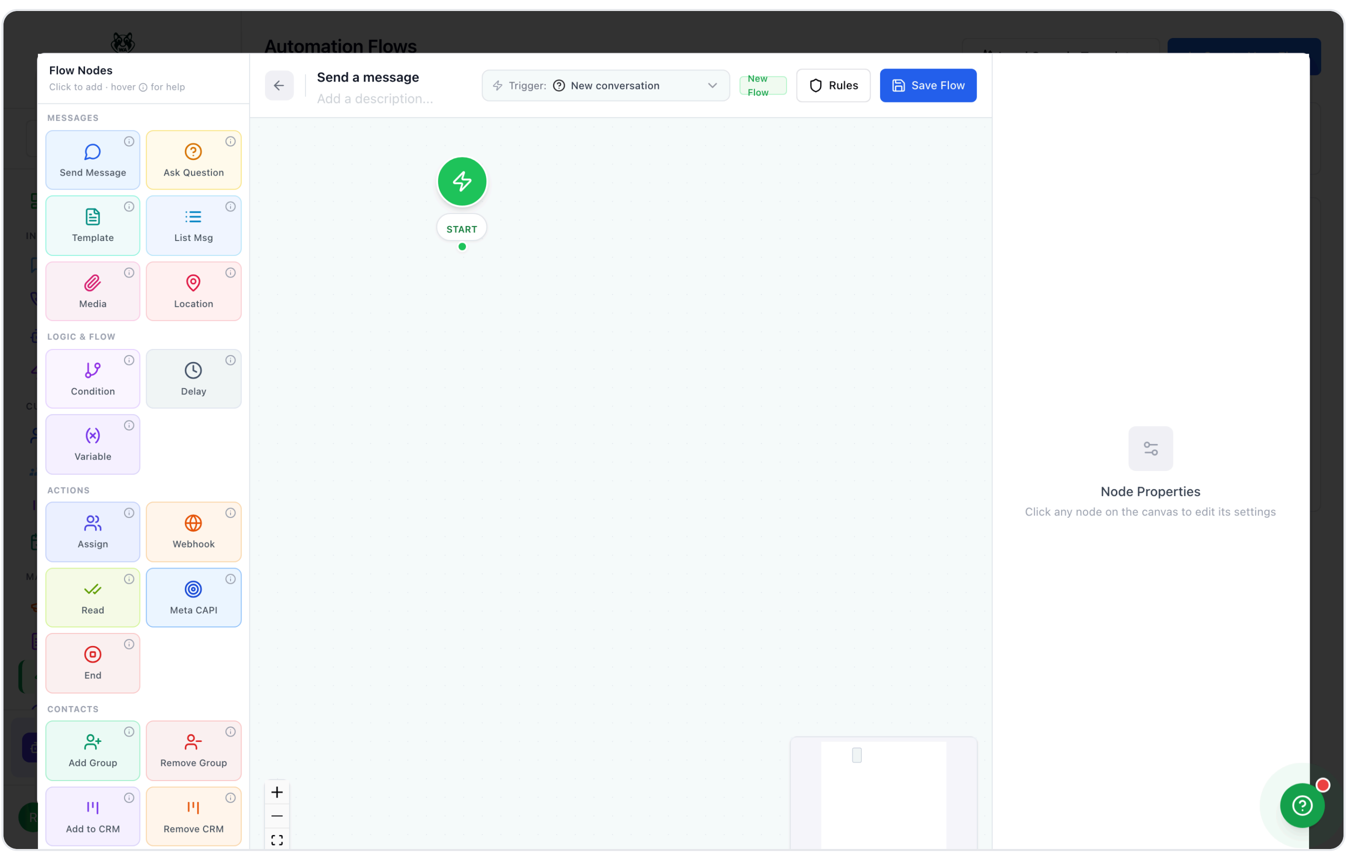
The Automations list: counter tiles on top, one card per flow

1. **Start a new flow.** Click the **Create New Flow** button in the top-right corner — the full-screen builder opens. If you have no flows yet, you can instead click **Load Sample Templates** to seed ready-made examples (they arrive inactive).



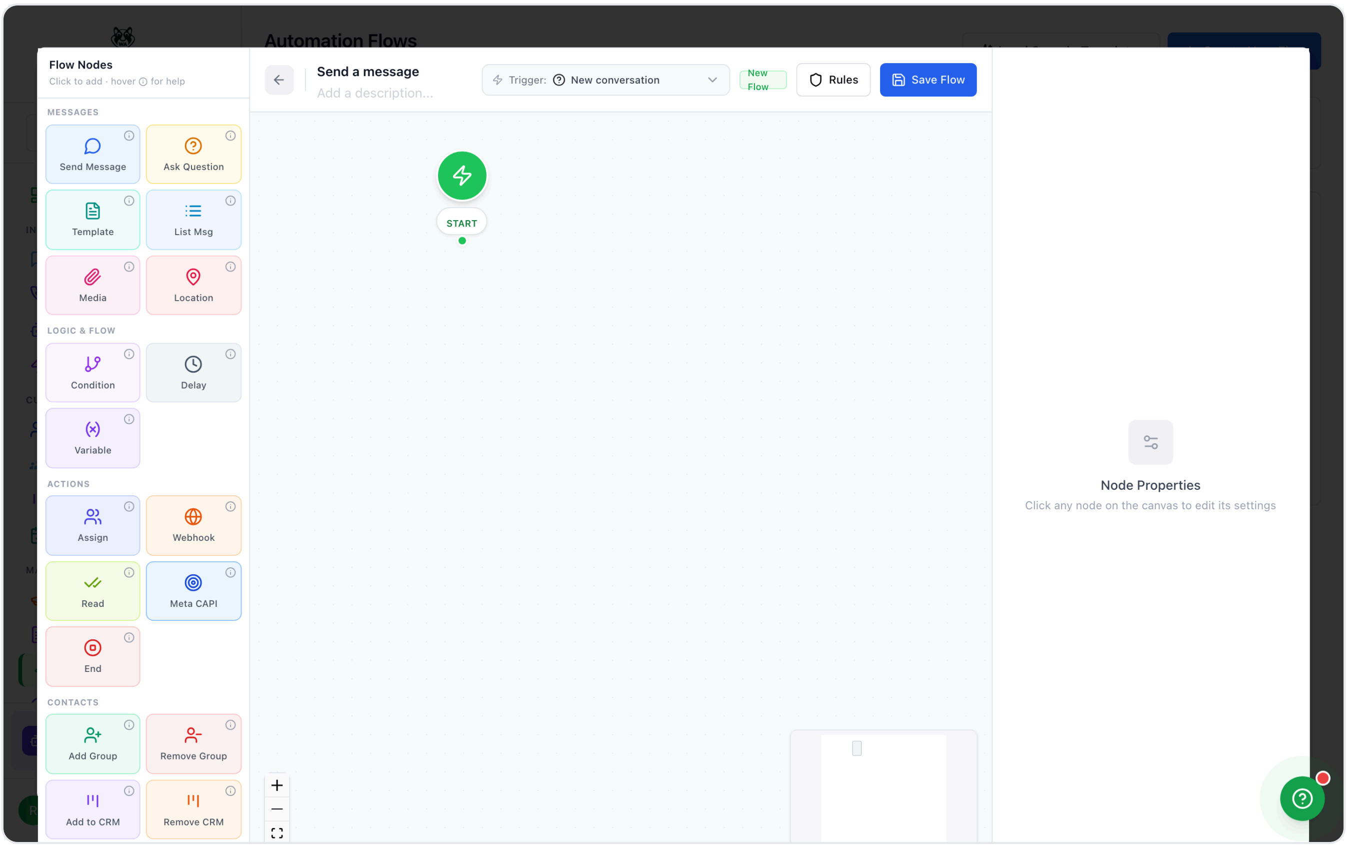
Click Create New Flow to open the full-screen builder

1. **Name the flow.** In the builder header (top-left), type a **flow name** in the title field and an optional **description** underneath it.



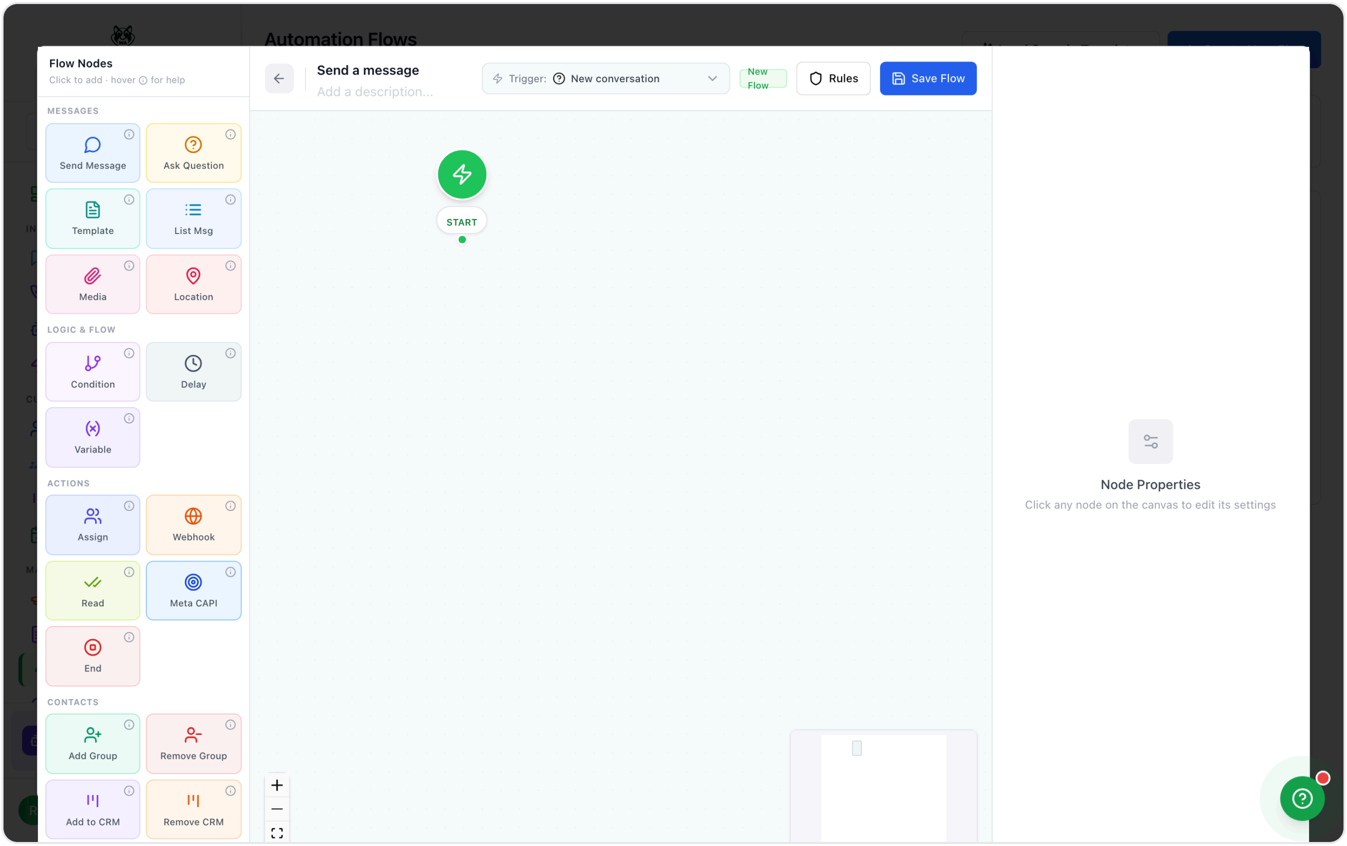
Name the flow in the header title field

1. **Choose a trigger.** In the header's grey **Trigger** pill (with the lightning icon), open the dropdown and pick one: *New conversation*, *Message received*, *CRM stage added/removed*, or *Group added/removed*. For CRM or Group triggers, a picker appears next to it so you can tick which stages or groups apply.



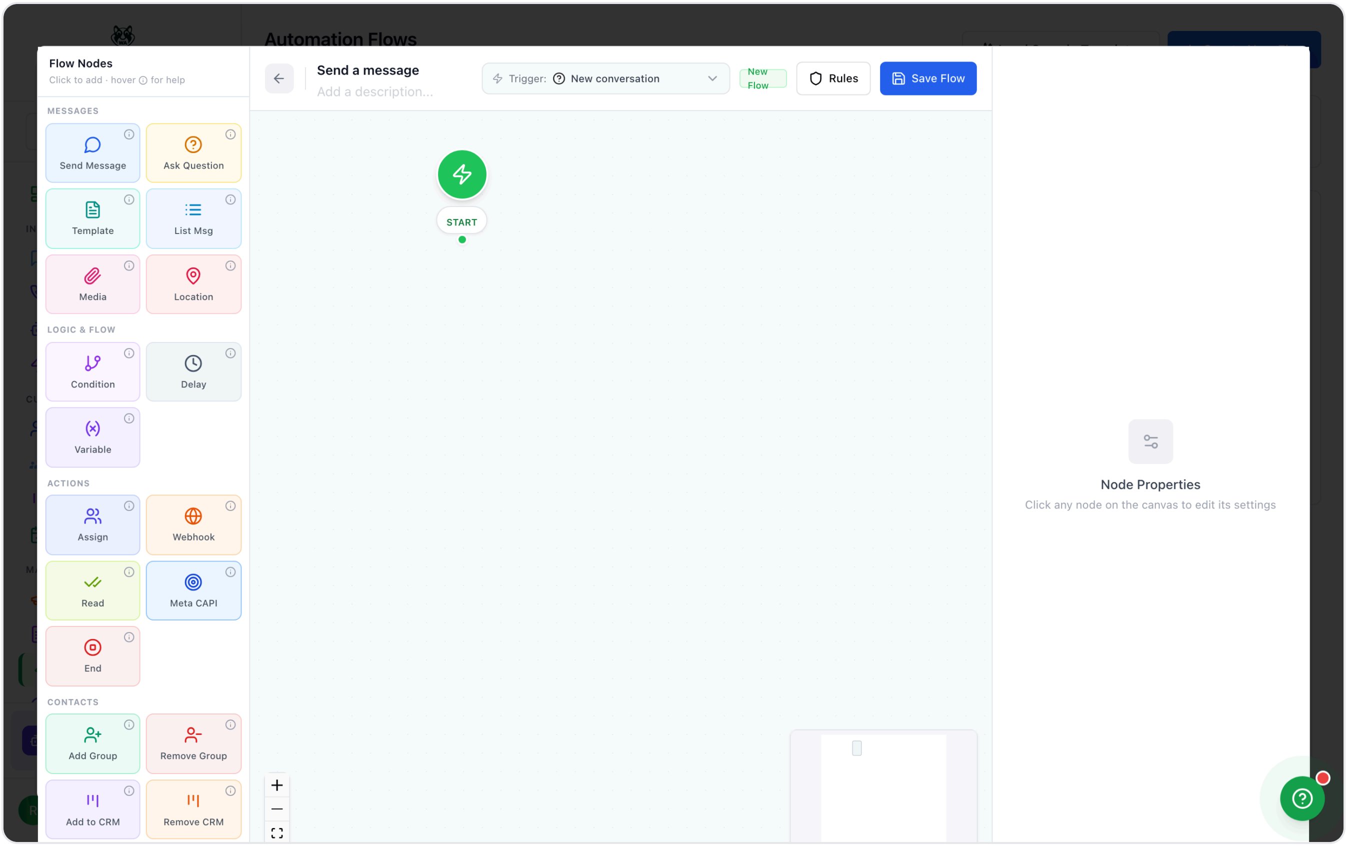
Pick the trigger that starts the flow

1. **Add nodes from the palette.** On the left is the **Flow Nodes** panel, grouped into **Messages** (Send Message, Ask Question, Template, List Msg, Media, Location), **Logic & Flow** (Condition, Delay, Variable), **Actions** (Assign, Webhook, Read, Meta CAPI, End), and **Contacts** (Add/Remove Group, Add/Remove CRM, Update). Click a node to drop it onto the canvas. Hover the small **i** icon on any node for an explanation.



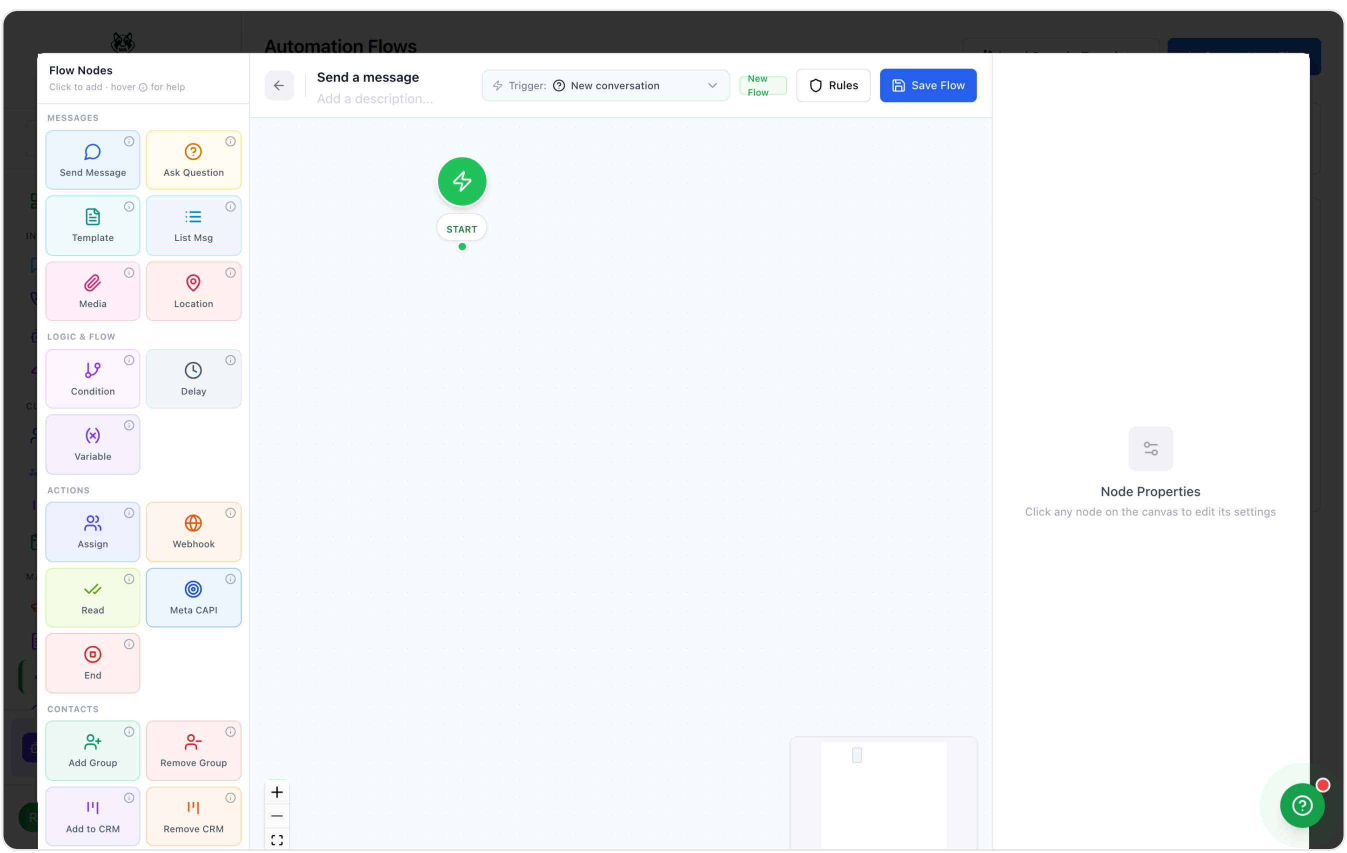
Click a node in the palette to add it to the canvas

1. **Connect the nodes.** On the canvas, drag from one node's connection **handle** to the next node to set the order. A trigger can fan out to several parallel branches that all run.



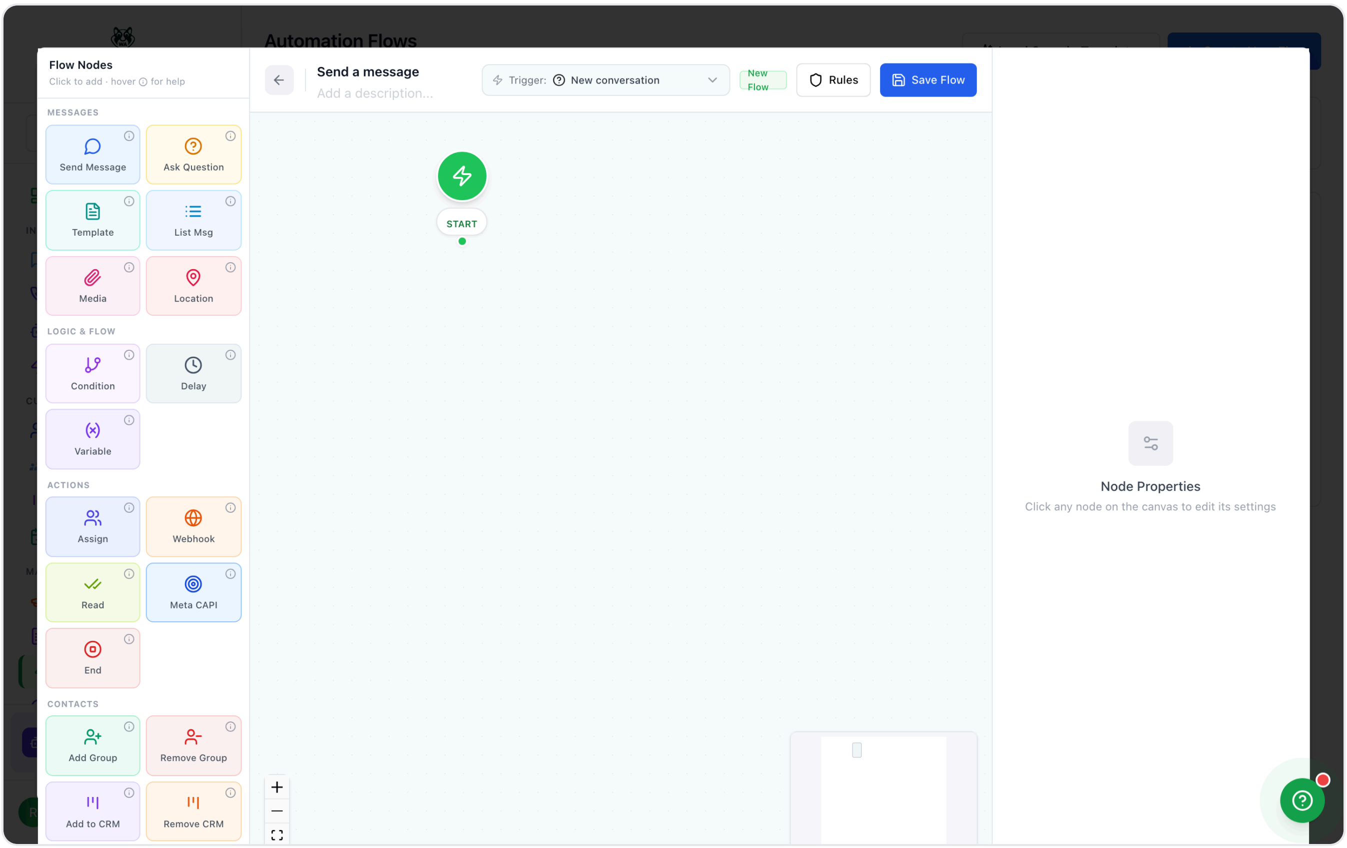
Drag from a node's handle to the next to define the order

1. **Configure each node.** Click a node to open its **config panel** and fill in its details — message text, template, condition keywords, delay duration, and so on.



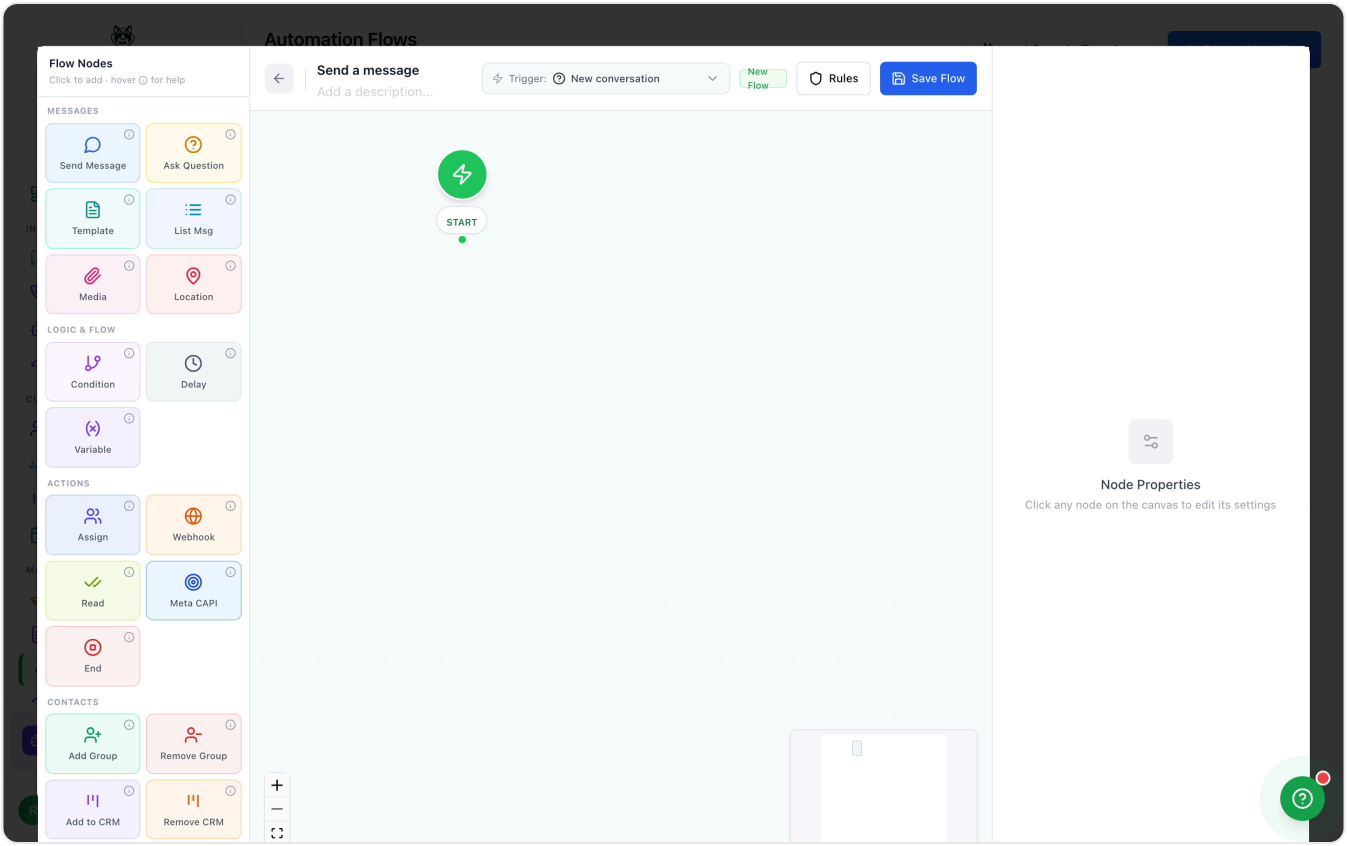
Click a node to open its config panel and fill in the details

1. **Set optional Rules.** Click the **Rules** button (shield icon) in the header to open pre-flight gates: **Time window** (only run on chosen days/hours in a timezone), **Don't run if conversation is open** (skip when a human agent is assigned), and a **CRM rule** (skip or run based on the contact's CRM stage). Empty rules mean always run; a blue dot on the button shows when rules are active.



Rules layer: gate when the flow is allowed to run

1. **Save and activate.** Click the **Save Flow** button (top-right of the header). Back on the Automations list, flip the **toggle switch** on the flow's card to turn it on — the status dot turns green and the flow runs whenever its trigger fires.



Save the flow, then toggle it on to go live

Tips

- The **Duplicate** button on a card clones all nodes and edges into a copy. Copies are always created **Inactive** so you can edit safely before going live.
- Use the **Test** button on a card to run the flow against a chosen conversation or contact without waiting for a real trigger.
- Drafts you haven't saved yet are kept locally and listed under **Unsaved Drafts** so you can pick them back up.
- The Meta CAPI node needs your Pixel ID and token set under **Settings → Meta CAPI** before it will fire events.

FAQ

Q: Why isn't my automation running?

A: First check the card's toggle is on (green). Then check the **Rules** layer — a time window or CRM rule may be blocking that trigger.

Q: Can two branches run at the same time?

A: Yes. A trigger can fan out to multiple parallel branches, and they all fire.

Q: Does duplicating a flow turn the copy on?

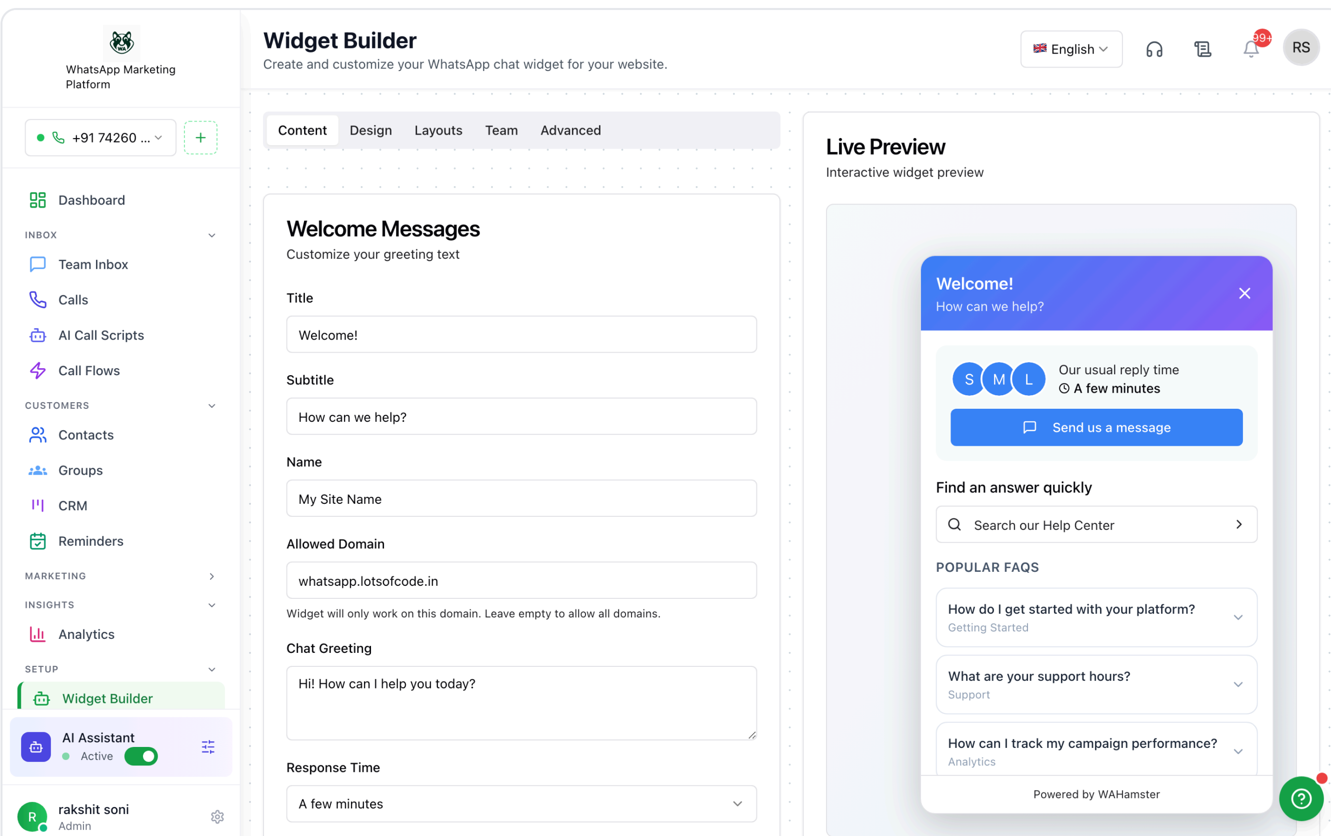
A: No. Copies are always created inactive — you activate them yourself when ready.

Chat widget and AI chatbot

The chat widget is the bubble you embed on your website so visitors can start a conversation that lands in the platform. Turn on the AI and that same widget answers automatically from your own content. This is a **three-stage chain that must be done in order**: build the widget → add AI training data → configure AI behaviour and go live. All of it lives under **Widget Builder** (`/widget-builder`) and **Settings → AI Setting** (`/settings?tab=ai_setting`) in the left sidebar.

Where to find it

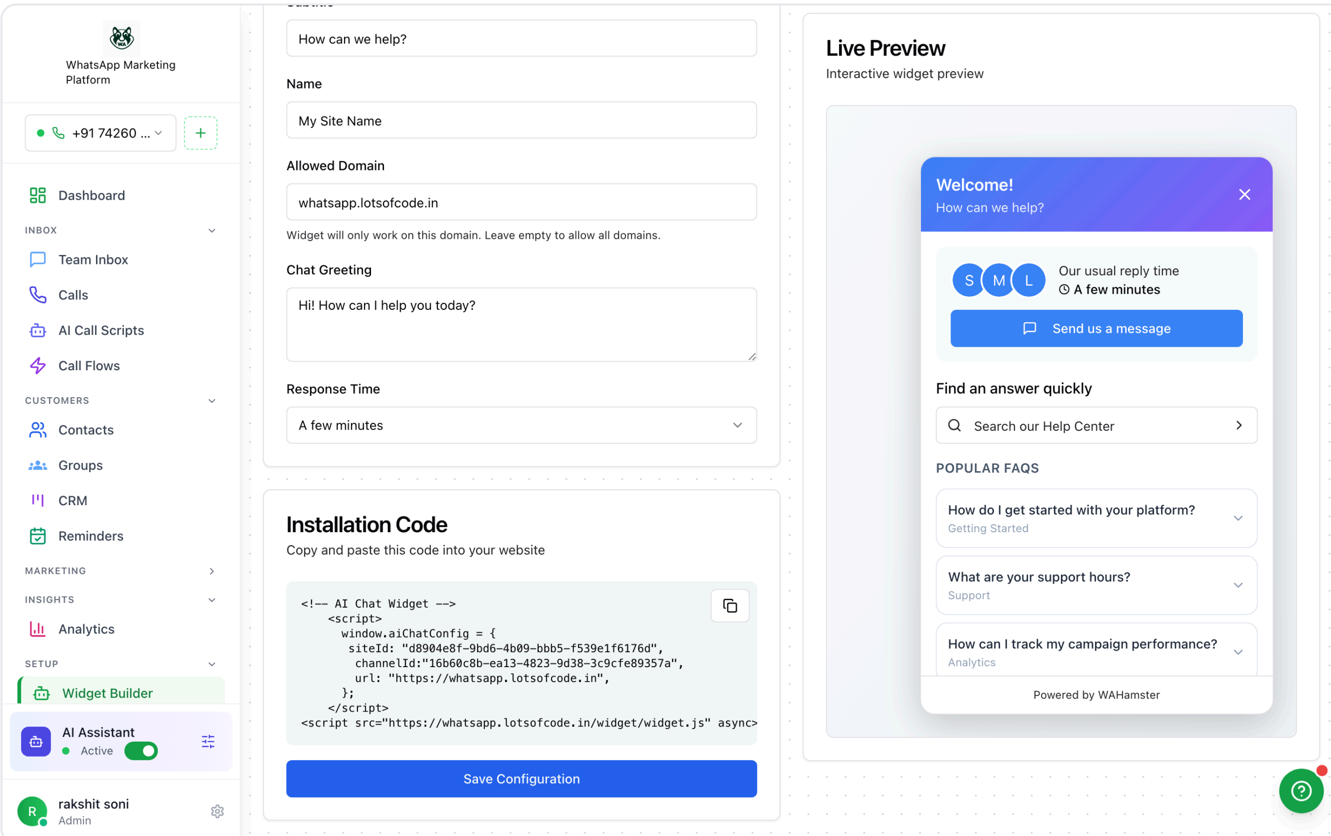
Click **Widget Builder** in the left sidebar. The customisation panel with its five tabs sits on the left, and a **live preview** of the widget updates on the right as you edit.



Widget Builder — five tabs on the left, live preview on the right

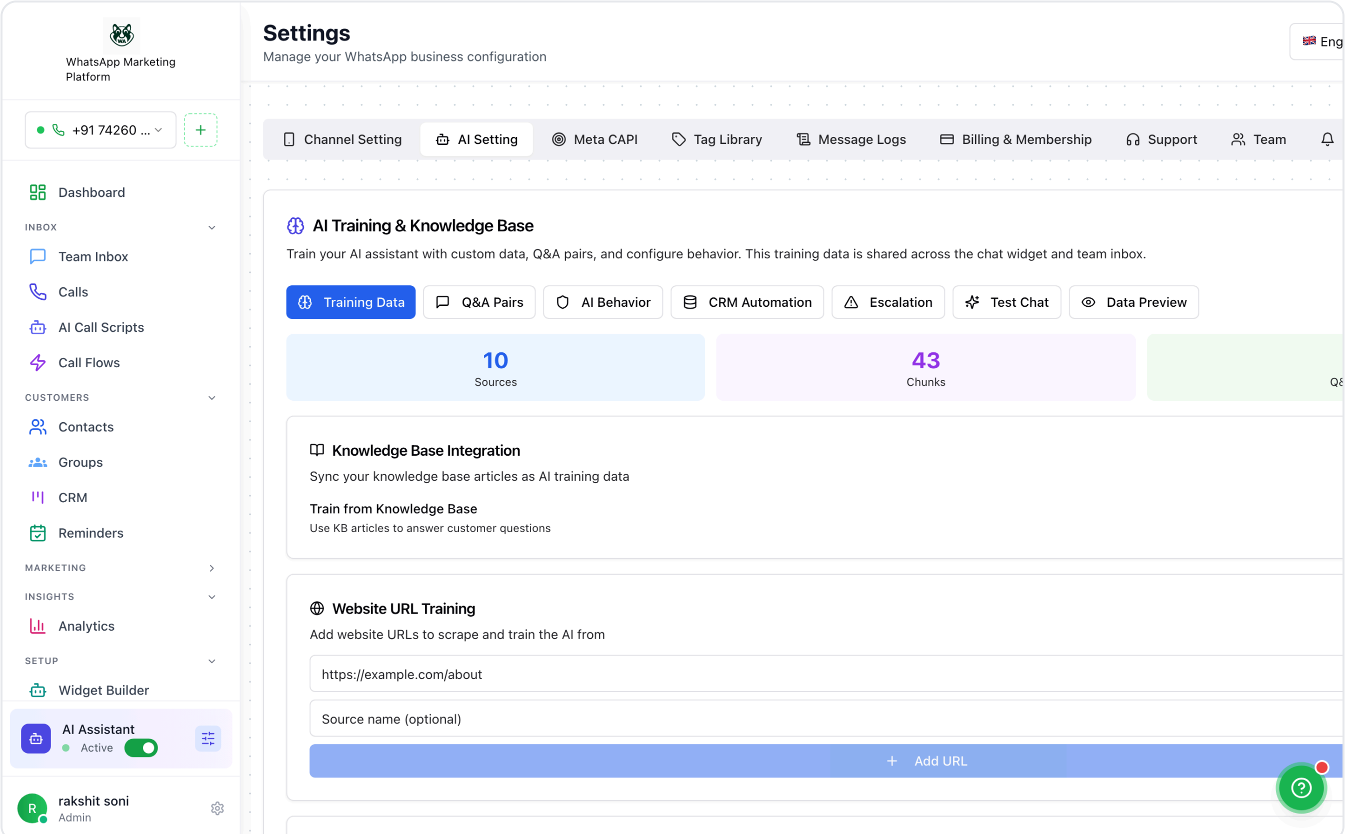
How to use (step by step)

1. **Fill in the Content tab.** On the **Content** tab (first tab, top-left), set the widget **Title**, **Subtitle**, **Name**, **Chat Greeting**, and **Response Time**. Leave **Allowed Domain** empty to run everywhere, or enter your site's domain to lock the widget to it. Watch the greeting appear in the live preview on the right.



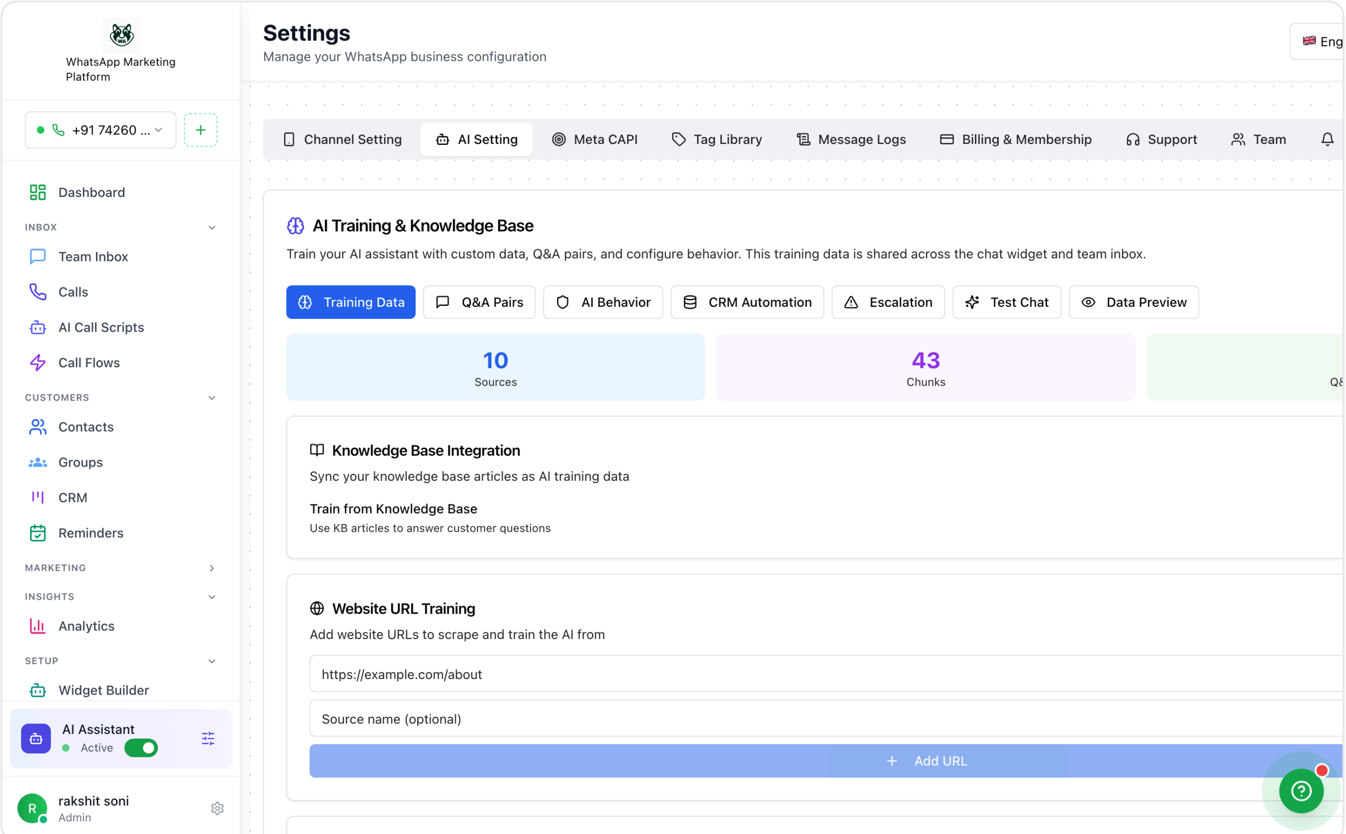
Content tab — title, subtitle, greeting, response time and allowed domain

1. **Style it on the Design tab.** Click the **Design** tab. Pick a **Style Preset** (Modern / Classic / Minimal), set the **Primary Color** and **Accent Color**, add your **Company Logo** (upload or URL), and choose the **Widget Position** (bottom-right, bottom-left, top-right, top-left). The preview recolours instantly.



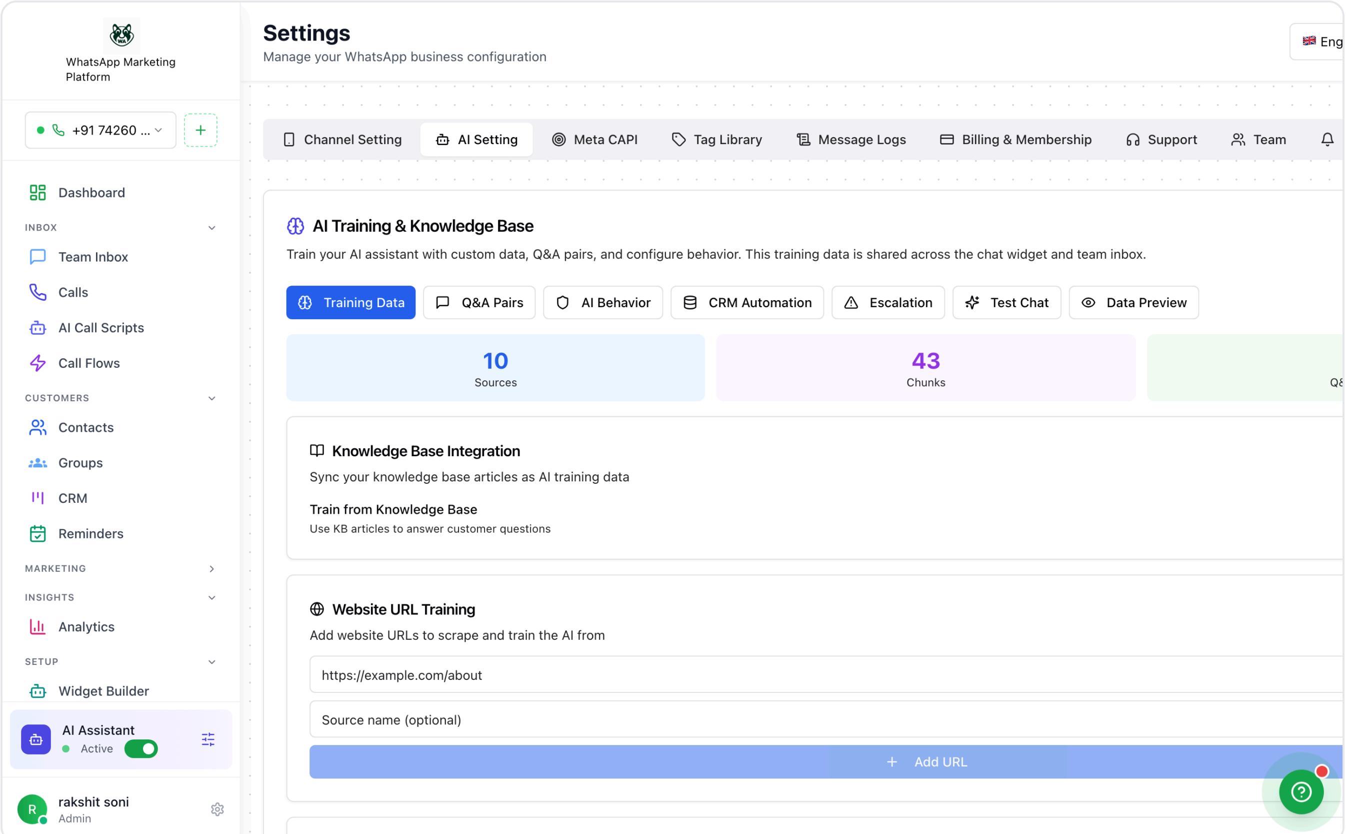
Design tab — preset, colours, logo and widget position

1. **Arrange the messenger on the Layouts tab.** Open the **Layouts** tab to set the button text, search placeholder, and number of **FAQs to Display**, plus the **Show Team Avatars** and **Show Recent FAQs** switches.



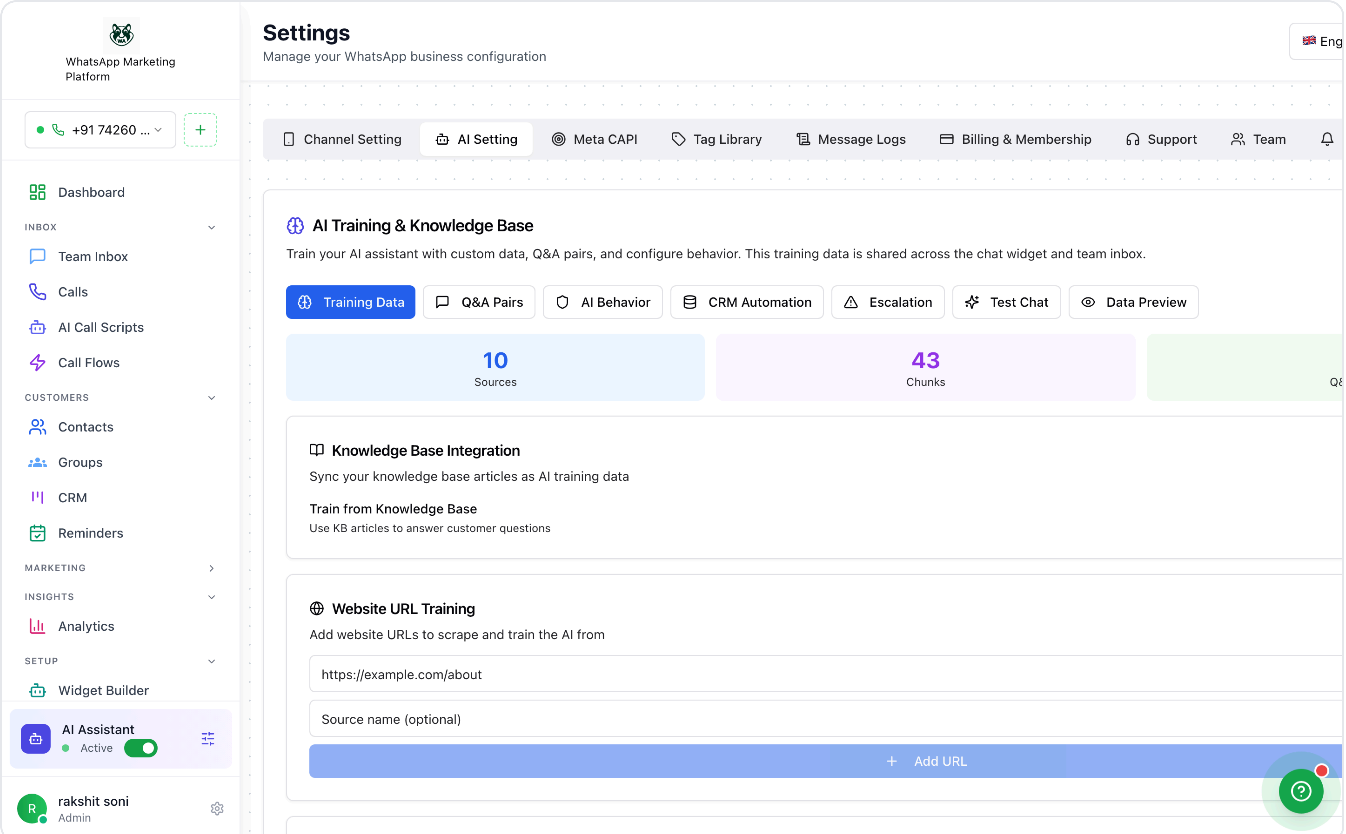
Layouts tab — button text, FAQs to display, avatar and FAQ switches

1. **Add your people on the Team tab.** Click the **Team** tab and add team members (pick a user, set their name and role) so their photos and names show inside the widget's header.



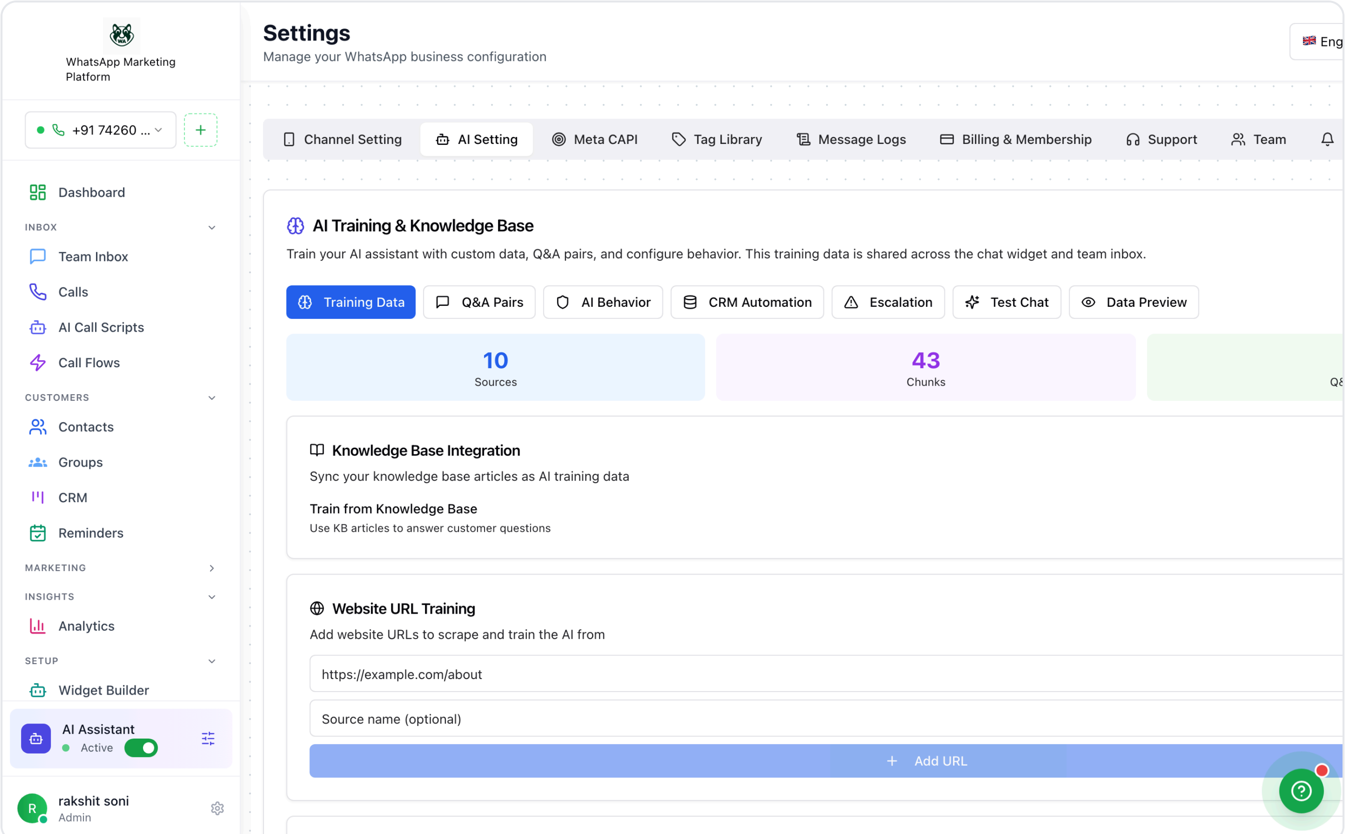
Team tab — add users whose photos appear in the widget

1. **Turn on the engine in the Advanced tab (Stage 1).** Open the **Advanced** tab. Turn ON **Live Chat** for real-time team messaging, and/or **AI Auto-Reply** to answer automatically from your training data. You must enable **at least one** — with both off, a yellow warning appears and the chat will not run. This tab is also where you set **Font Family**, **Button Style**, **Shadow Intensity**, and **Animation Speed**.



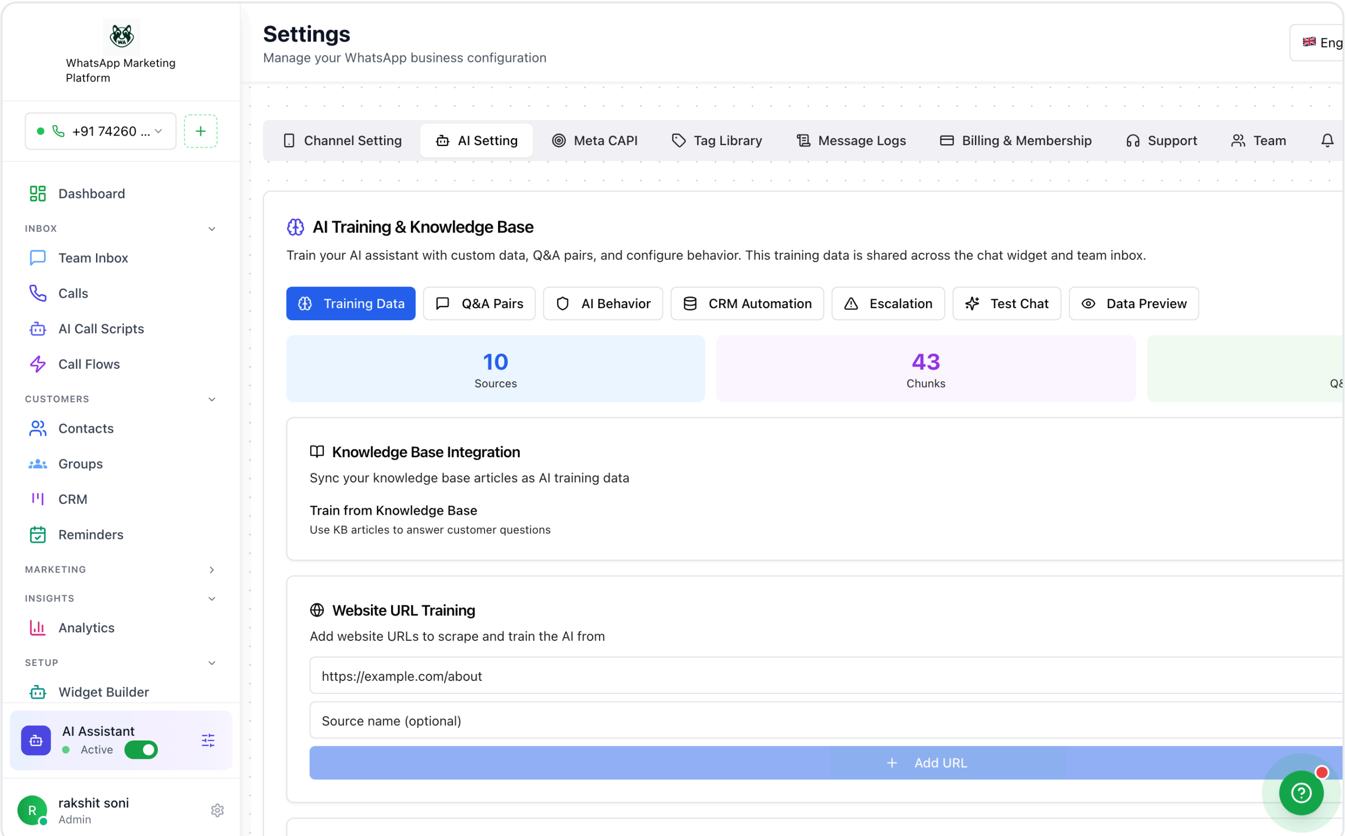
Advanced tab — Live Chat and AI Auto-Reply switches (at least one must be ON)

1. **Save and copy the embed code.** Click **Save** to store the configuration, then click **Copy Code** below the panel and paste the snippet before the closing `</body>` tag of your website. Editing and saving again updates the live widget automatically — you never need to re-paste the code.



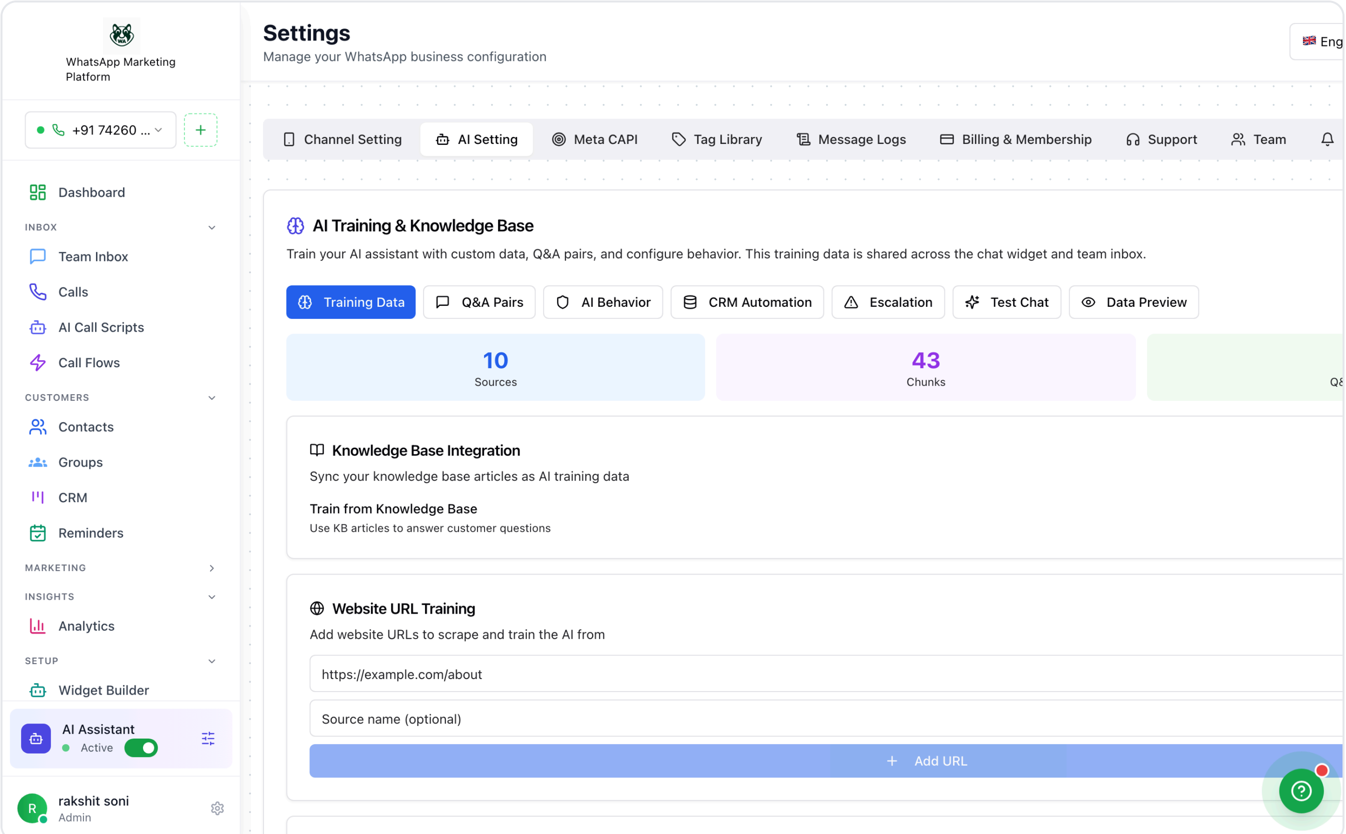
Save, then Copy Code — paste the snippet before </body>

1. **Add training data (Stage 2 — Add a URL).** Go to **Settings → AI Setting** to open the **AI Training & Knowledge Base** panel, and stay on the **Training Data** tab. Under **Website URL Training**, paste a page address, optionally name the source, and click **Add URL**. Wait for its status to turn to a green check ("completed"). The summary bar at the top counts your **Sources**, **Chunks**, and **Q&A Pairs**.



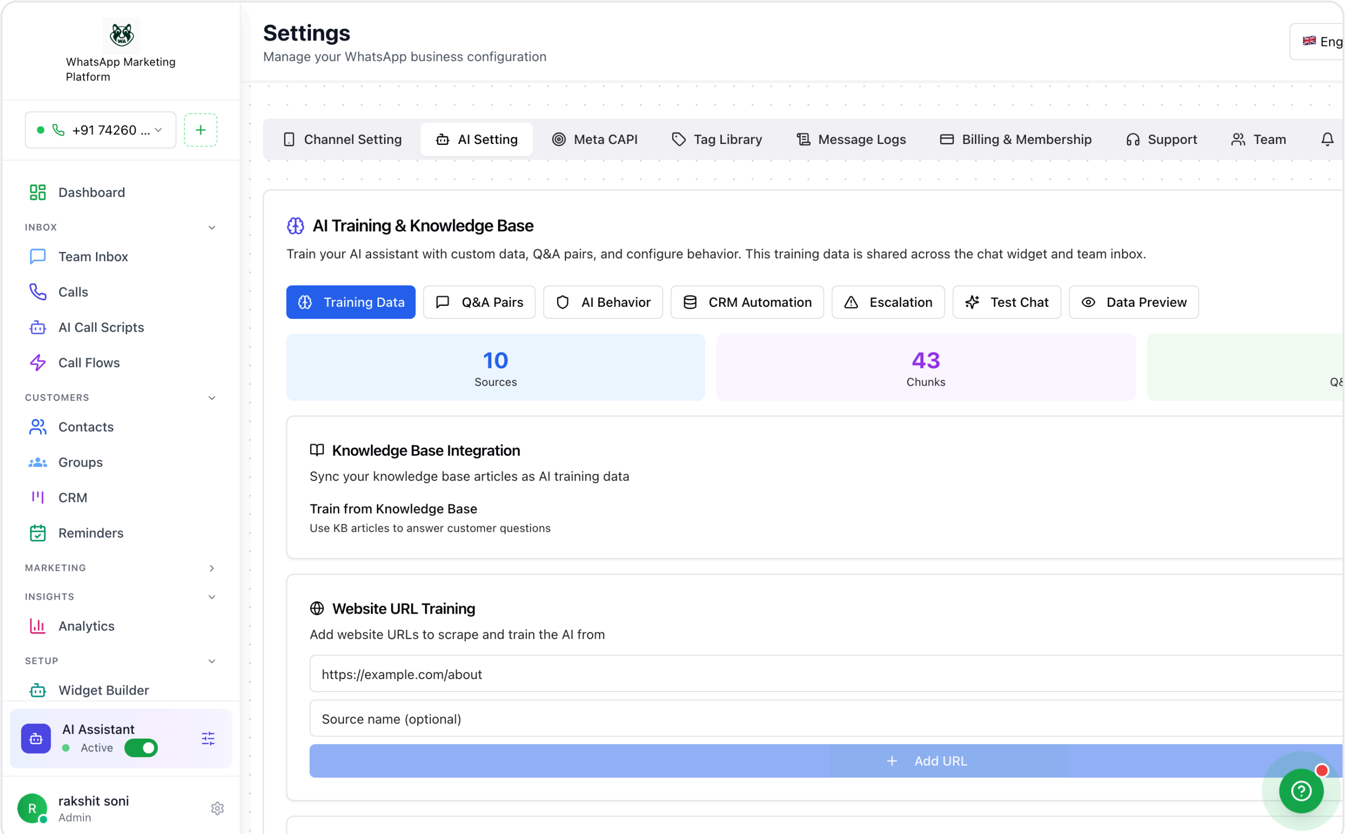
Training Data tab — paste a URL and click Add URL, wait for the green check

1. **Upload a document or sync your Knowledge Base.** Still on **Training Data**, use **Upload Document** to add a PDF, TXT, CSV, DOCX, or MD file (max 10MB), or in the **Knowledge Base Integration** card turn on **Train from Knowledge Base** and click **Sync Knowledge Base Articles**. Both become searchable sources.



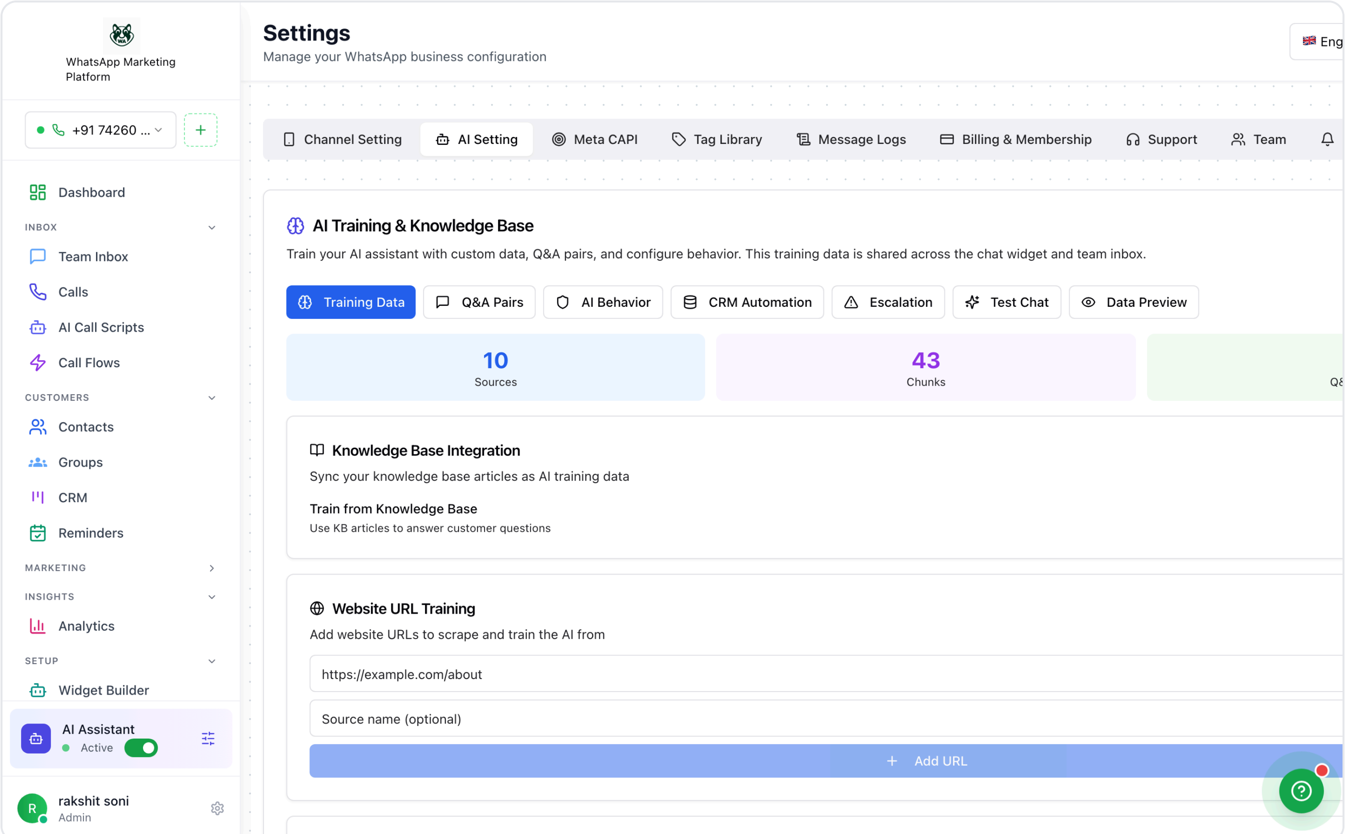
Upload Document and Sync Knowledge Base Articles as extra sources

1. **Add Q&A Pairs for exact answers.** Click the **Q&A Pairs** tab, type a **Question** and **Answer**, pick a **Category** (General, Pricing, Product, Support, Shipping, Returns, Account), and click **Add Q&A Pair**. Q&A pairs are matched directly and are the most reliable way to force a specific answer.



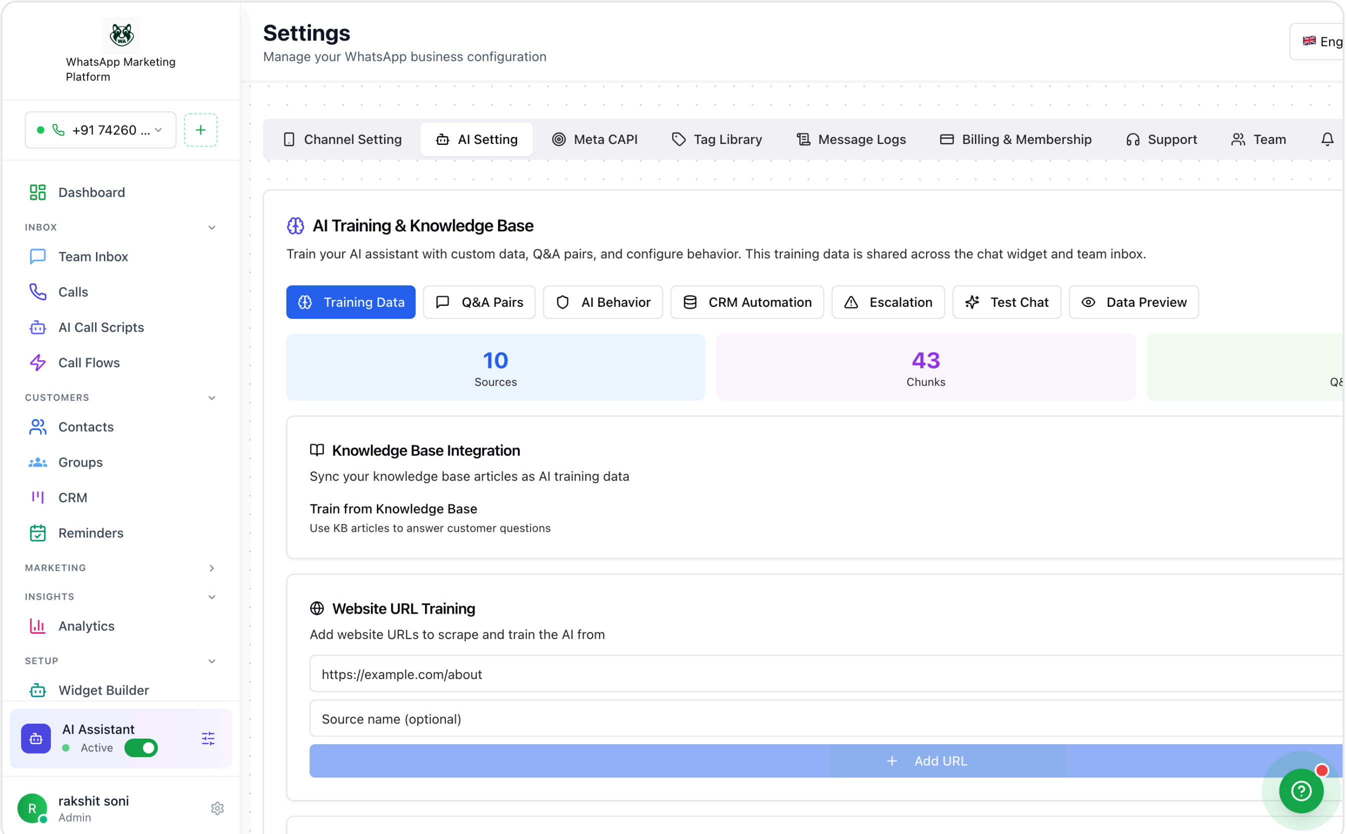
Q&A Pairs tab — force exact answers with a question/answer/category

1. **Configure AI behaviour and go live (Stage 3).** Open the **AI Behavior** tab. Choose a **Provider** (OpenAI / Anthropic / Google / DeepSeek), paste its **API Key**, pick a **Model**, and optionally set **Temperature**, **Max Tokens**, **System Prompt**, **Response Tone**, **Max Response Length**, **Trigger Words**, and a **Fallback Message**. Click **Save AI Settings**, then turn ON the **Active** switch (top-right of the AI Provider Configuration card) — it only works after saving, otherwise you see "Save configuration first".



AI Behavior tab — provider, key, model, Save AI Settings, then the Active switch

1. **Verify in Test Chat.** Open the **Test Chat** tab, type a message, and check the reply before real customers see it. Each answer shows how many chunks and Q&A pairs it used; click **Clear Chat** to reset.



Test Chat — confirm the AI answers correctly before going live

Tips

- The order matters: enable the widget switch first, add training data second, activate the AI last. Skipping or reordering leaves the AI silent — this is the number-one support question.
- OpenAI or Google give the best answers because they support embeddings; Anthropic and DeepSeek fall back to keyword matching (a yellow notice warns you).
- Use **Allowed Domain** to lock the widget to your production site, and re-scrape pages with **Refresh all URLs** after you update your website.
- For a pure AI bot enable only **AI Auto-Reply**; for AI plus human handoff enable both **AI Auto-Reply** and **Live Chat**.

FAQ

Q: I pasted the code but no widget appears.

A: Check that **Allowed Domain** matches the site, that you clicked **Save** after editing, and that at least one Advanced switch (Live Chat or AI Auto-Reply) is ON.

Q: I entered the API key but the AI says nothing.

A: Make sure all three stages are done in order — the widget switch (Stage 1) is ON, training data is added (Stage 2), and the **Active** toggle (Stage 3) is ON after you saved.

Q: The Active switch won't turn on.

A: You must click **Save AI Settings** first. The toggle refuses until a saved configuration exists.

Q: Where do my AI charges go?

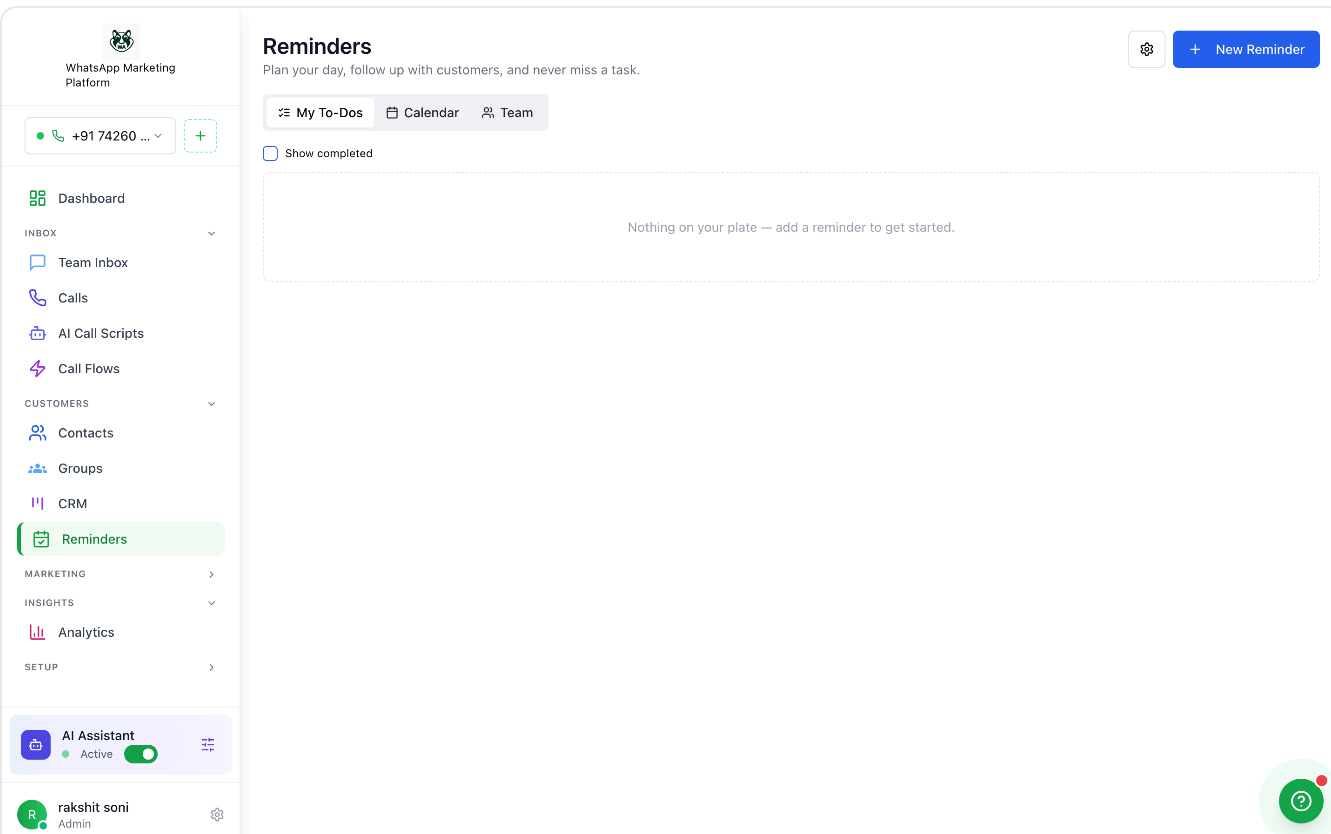
A: Directly to your chosen provider, billed to that account's API key — not to the platform.

Reminders and calendar

Reminders are personal or team to-dos and alerts, optionally linked to a contact, so you never miss a callback or follow-up. When one comes due, an **alarm** pops up in the top-right of the platform with a sound. Find it by clicking **Reminders** in the left sidebar (`/reminders`).

Where to find it

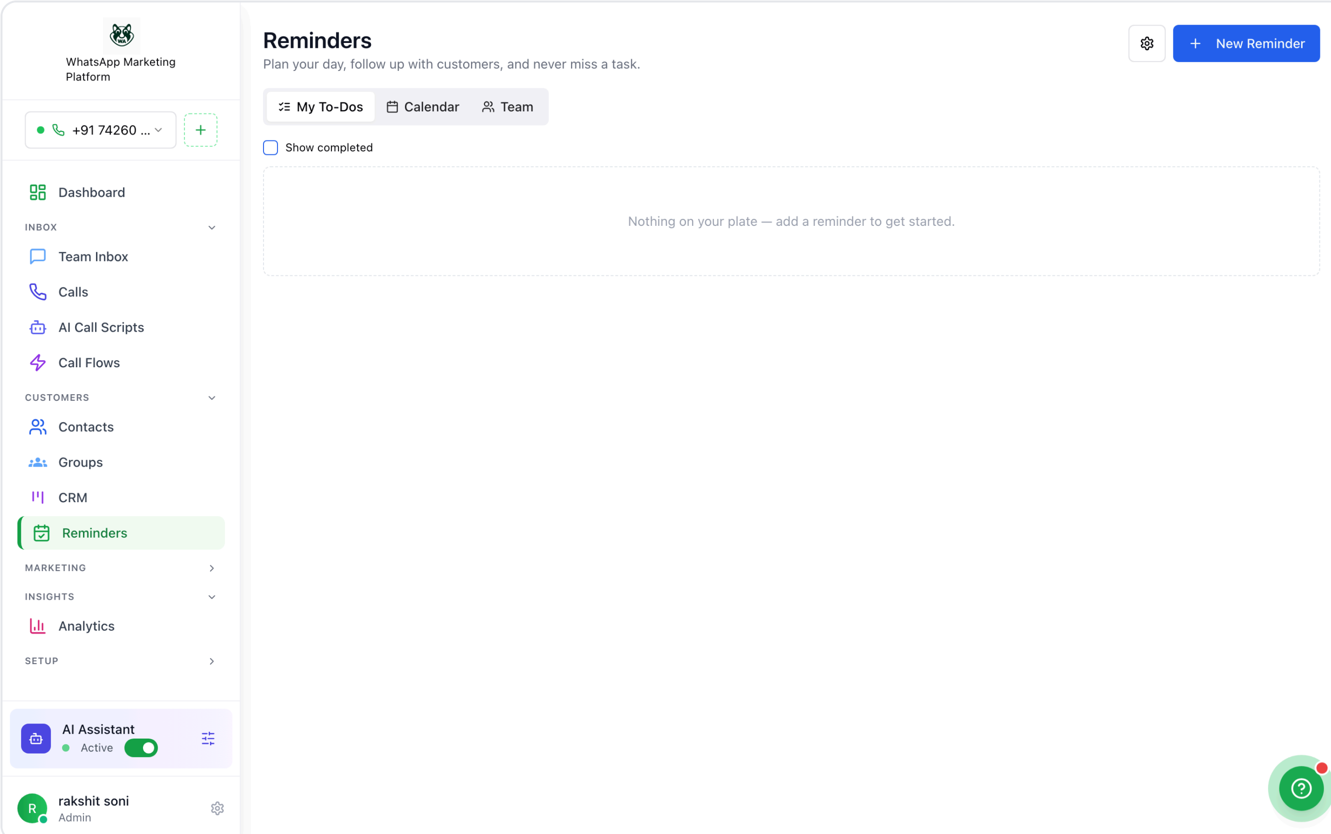
The **Reminders** page opens on three tabs: **My To-Dos** (your reminders grouped into Overdue / Today / This Week / Later / No Date), **Calendar** (month/week/day/agenda view), and **Team** (admins only — everyone's reminders).



Reminders page — My To-Dos, Calendar and Team tabs

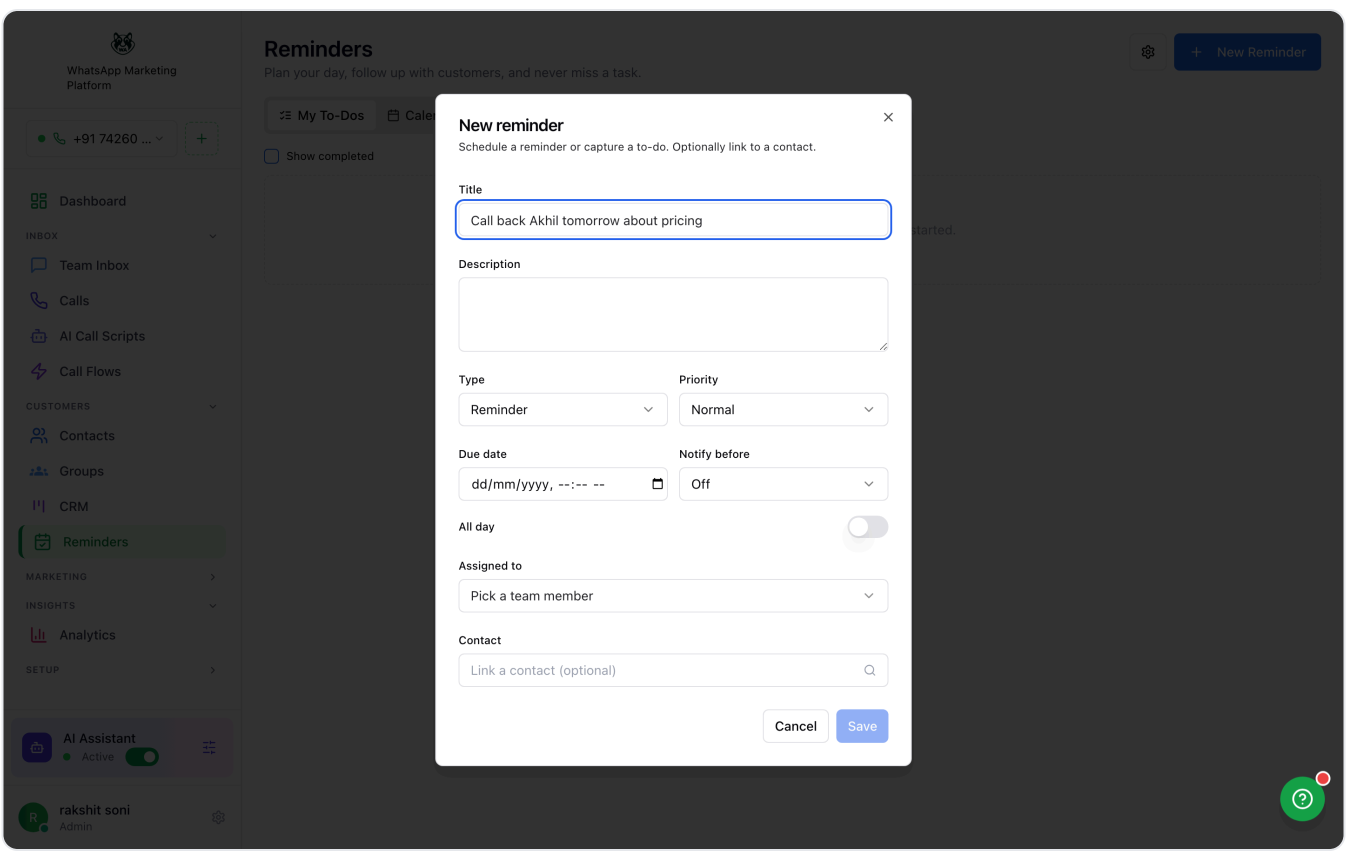
How to use (step by step)

1. **Open the new reminder dialog.** Click the **+ New Reminder** button in the top-right. A dialog opens where you build the reminder.



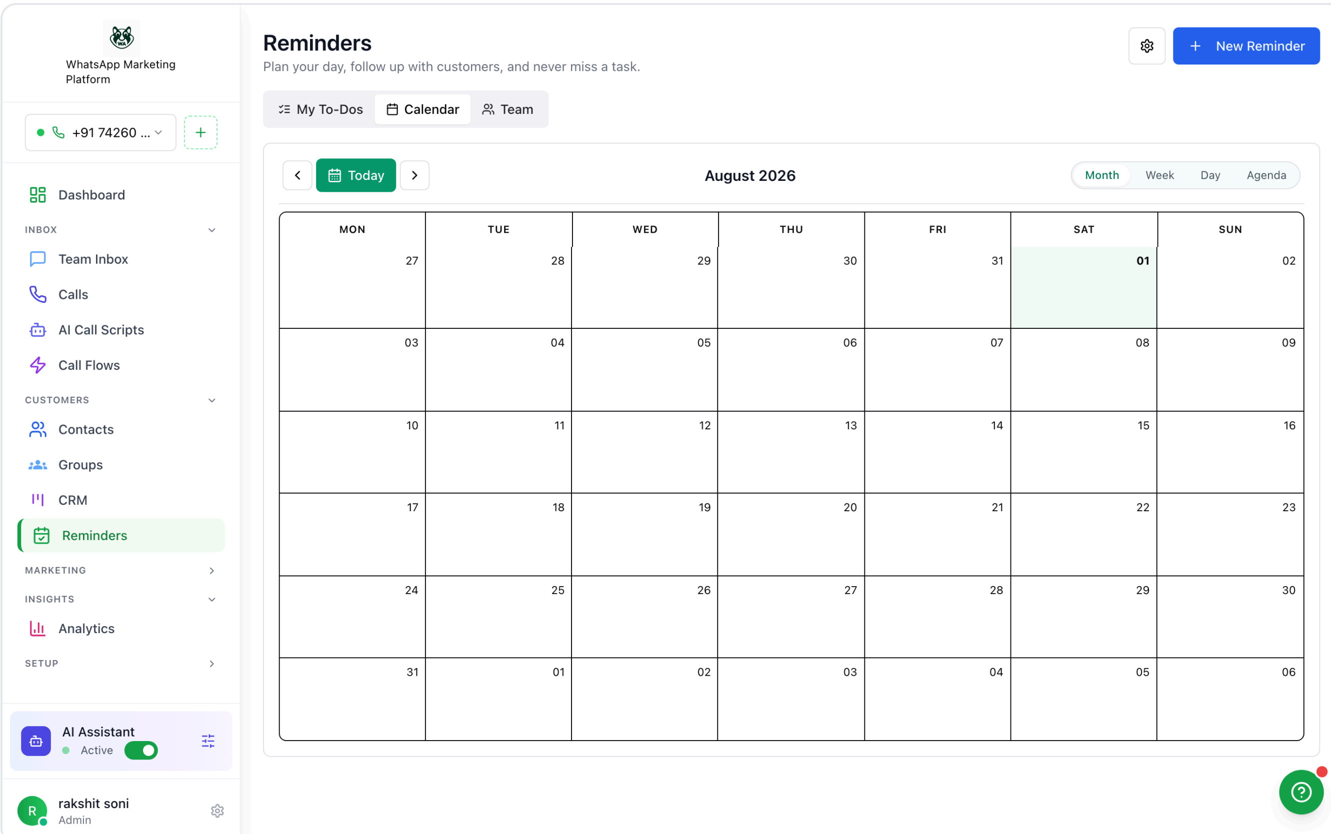
Click + New Reminder in the top-right to open the dialog

1. **Enter the basics.** Type a **title** (required) and an optional description, then choose a **type** (Reminder or To-do) and a **priority** (Low / Normal / High / Urgent).



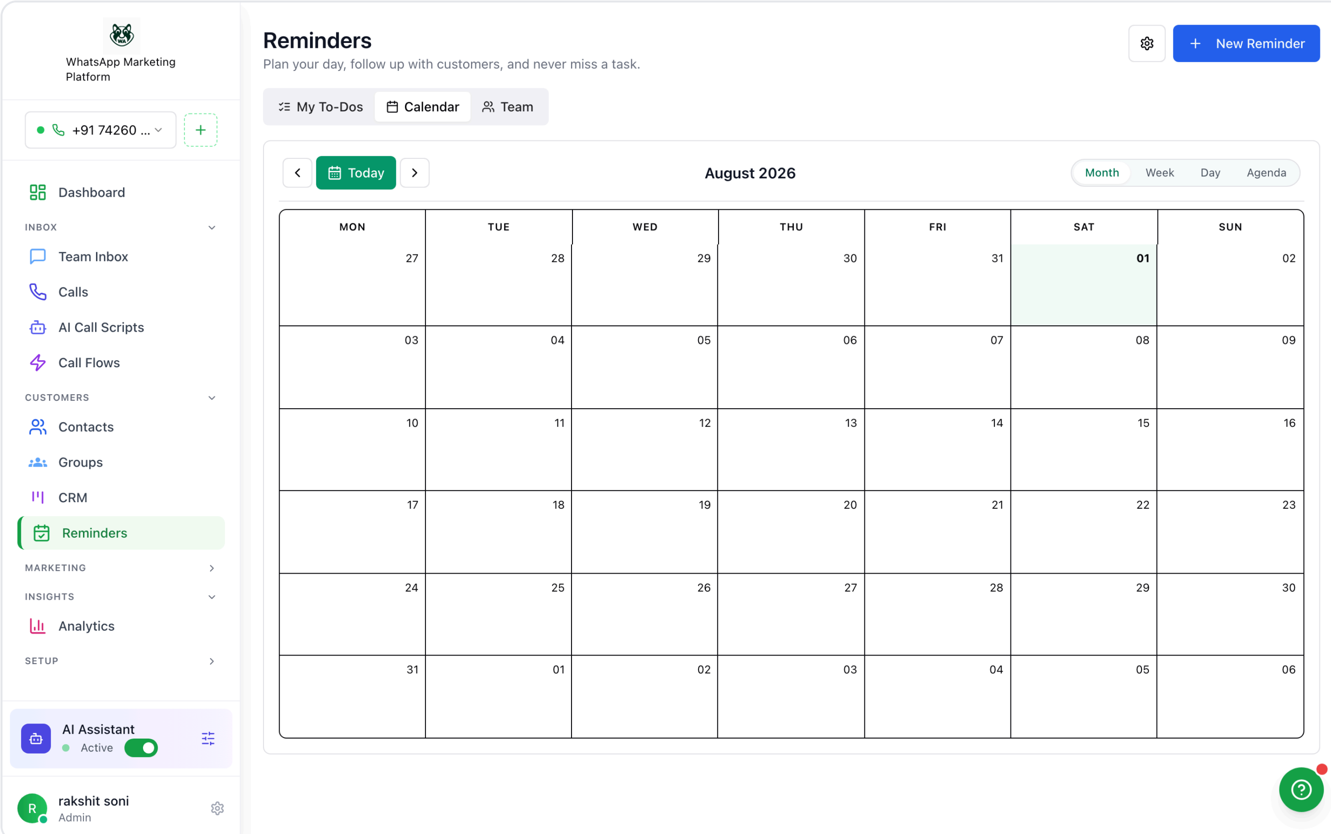
Title, type and priority in the reminder dialog

1. **Set the due time and lead time.** Pick the **Due** date and time. Optionally choose a **lead time** (None, 5/15/30 min, 1 hour, 1 day) so the alarm fires that far *before* the due time, or toggle **All day** if it has no specific time.



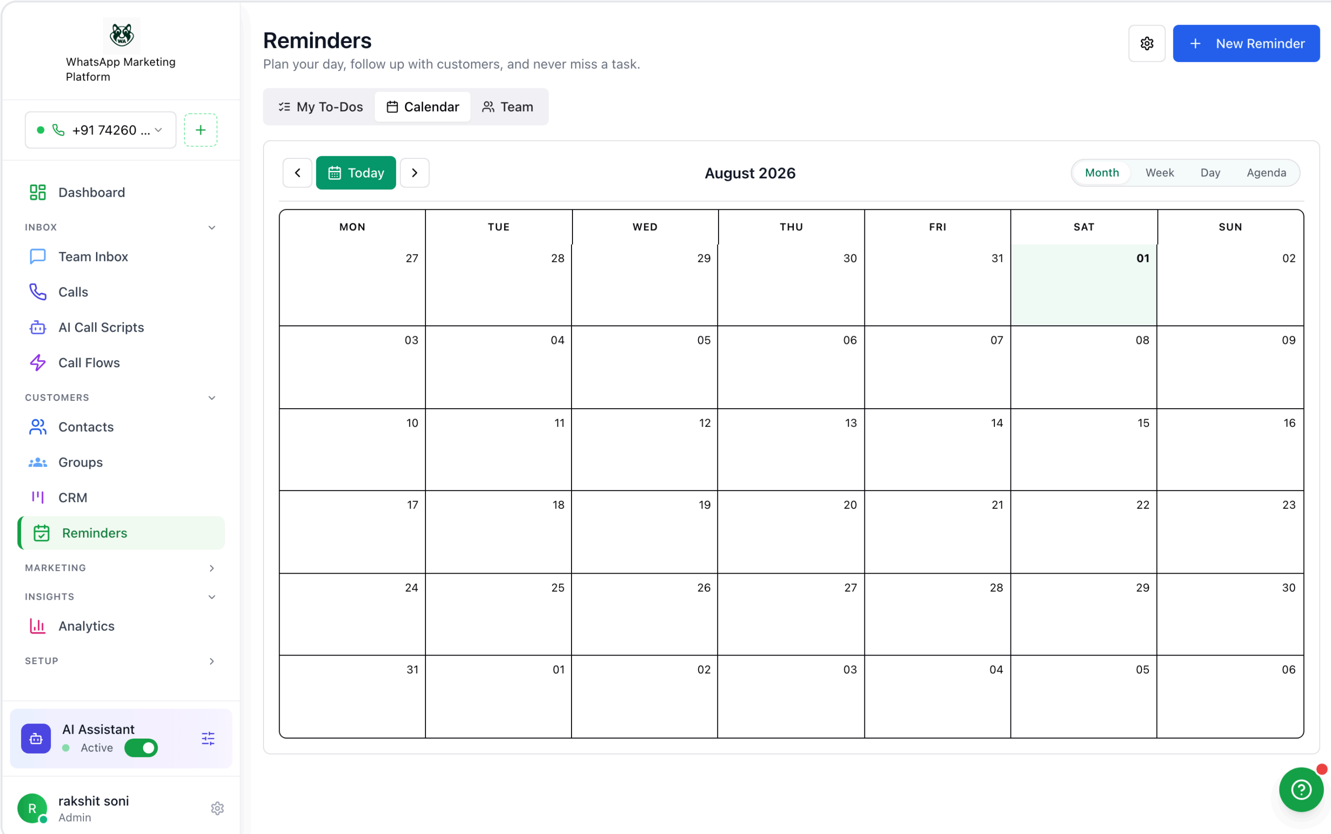
Due date and time, lead time and the All day toggle

1. **Assign and link, then save.** Optionally **assign** the reminder to a team member and/or link a **contact** so it shows alongside that customer, then click **Save**. It drops into the right bucket on My To-Dos and onto the calendar.



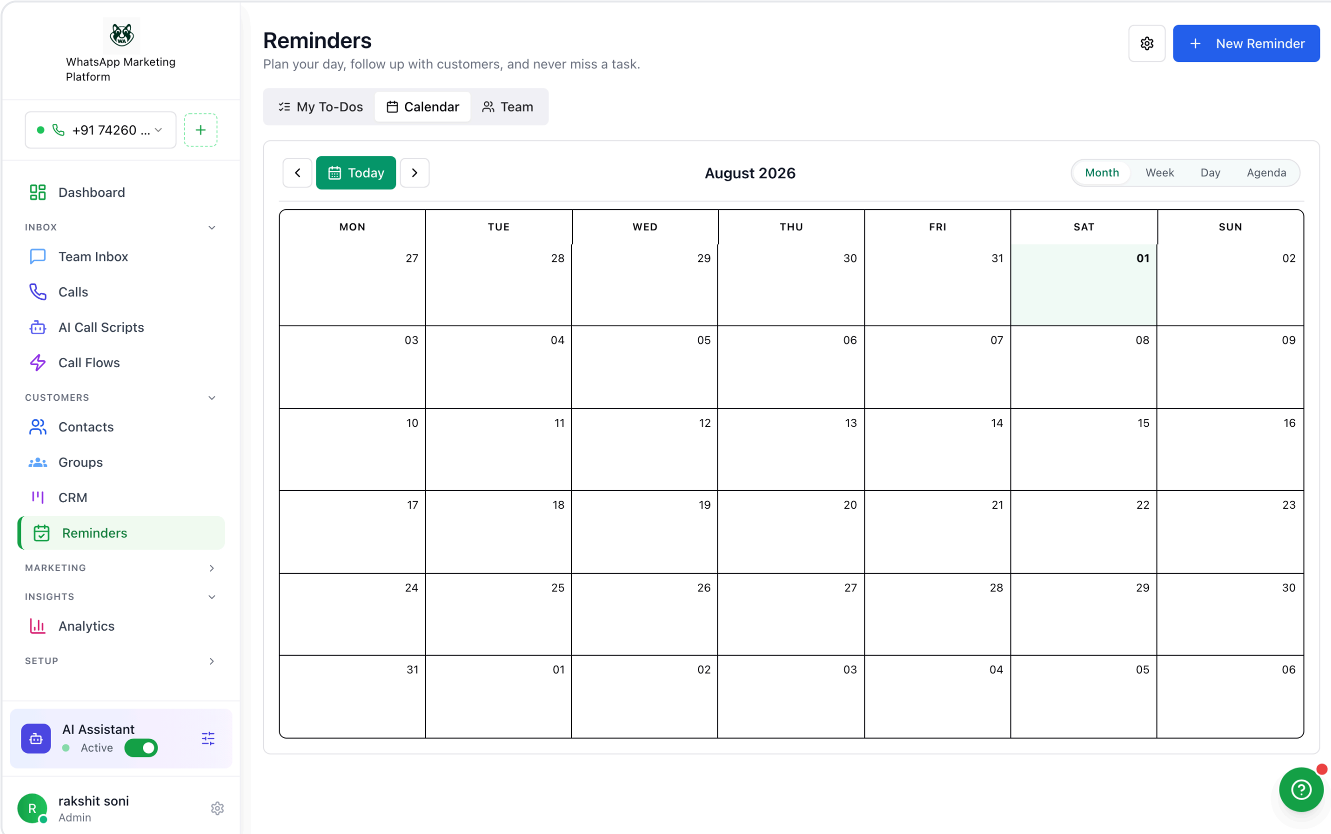
Assign to a teammate, link a contact, then Save

1. **Track them on My To-Dos.** Back on the **My To-Dos** tab, reminders sit in Overdue / Today / This Week / Later buckets. Overdue pending ones carry a red **Overdue** badge. Tick a reminder's checkbox to mark it done, and turn on **Show completed** to reveal done and cancelled items.



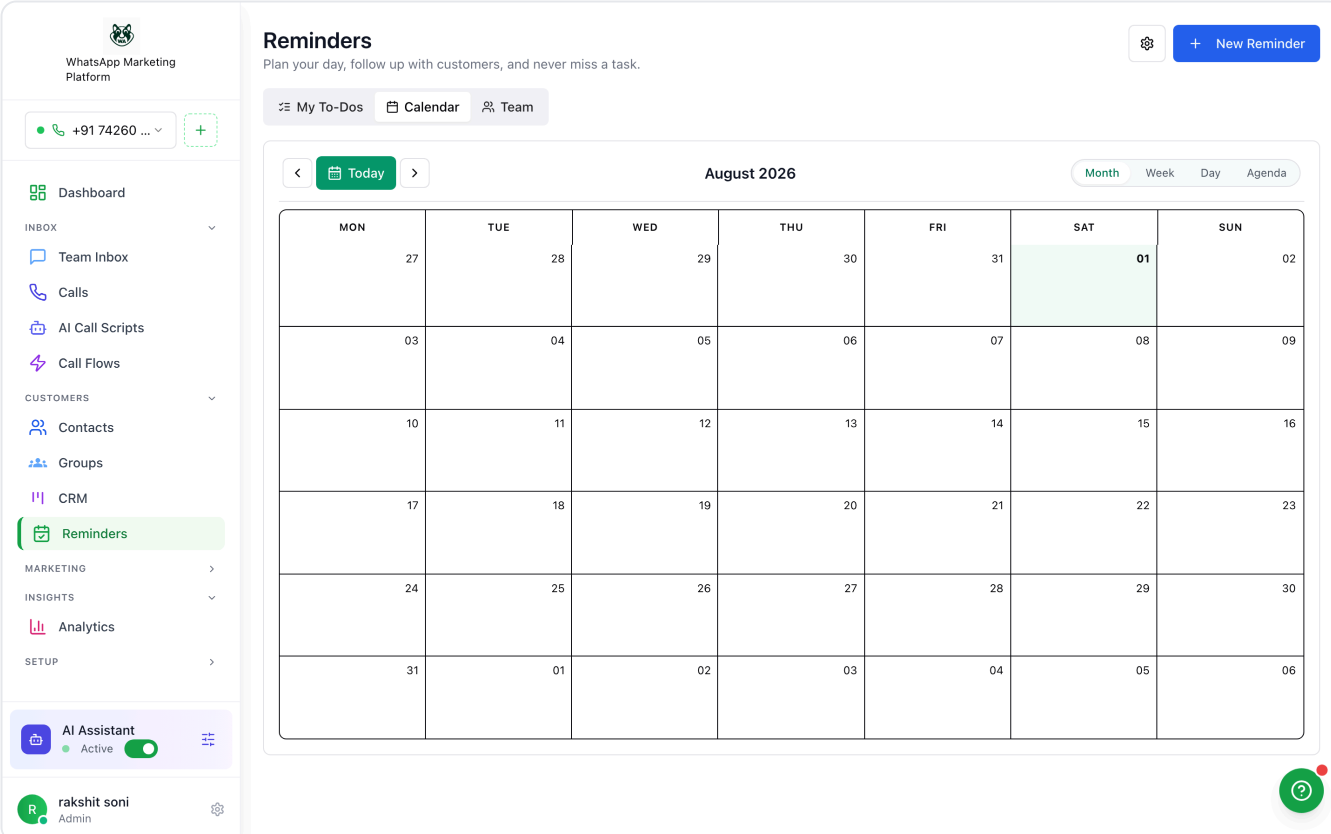
My To-Dos — buckets, Overdue badges, checkboxes and Show completed

1. **Use the Calendar tab.** Click the **Calendar** tab to see reminders as events. Click any empty day or time slot to create a reminder pre-filled with that date, or click an existing event to edit it. Contact-linked events show the contact's name in the title.



Calendar tab — click a slot to create, click an event to edit

1. **Respond to the alarm.** When a reminder is due (accounting for lead time), a red **alarm card** stacks in the top-right corner with a repeating sound. Up to three show at once with a "+N more" button for the rest. **Dismiss** or **snooze** a card to clear it — snoozed reminders re-fire later and jump back to the front of the stack.



Alarm card top-right — dismiss or snooze when a reminder is due

Tips

- Set a **lead time** on anything time-sensitive so you get advance notice instead of an alert at the exact moment it's due.
- Linking a reminder to a **contact** makes it appear on that customer's timeline and shows their name and phone on the row and in calendar titles.
- Admins can watch the whole team's workload from the **Team** tab.
- Snoozed reminders always reappear at the top of the alarm stack, so they're hard to miss twice.

FAQ

Q: I didn't hear the alarm sound.

A: Browsers block audio until you interact with the page. Click anywhere in the app once and the alarm sound turns on.

Q: What does lead time do?

A: It makes the alarm fire *before* the due time (for example 1 day earlier) so you get advance warning.

Q: Can I see my teammates' reminders?

A: Admins can, via the **Team** tab. Regular team members only see their own.

Q: What happens when I snooze an alarm?

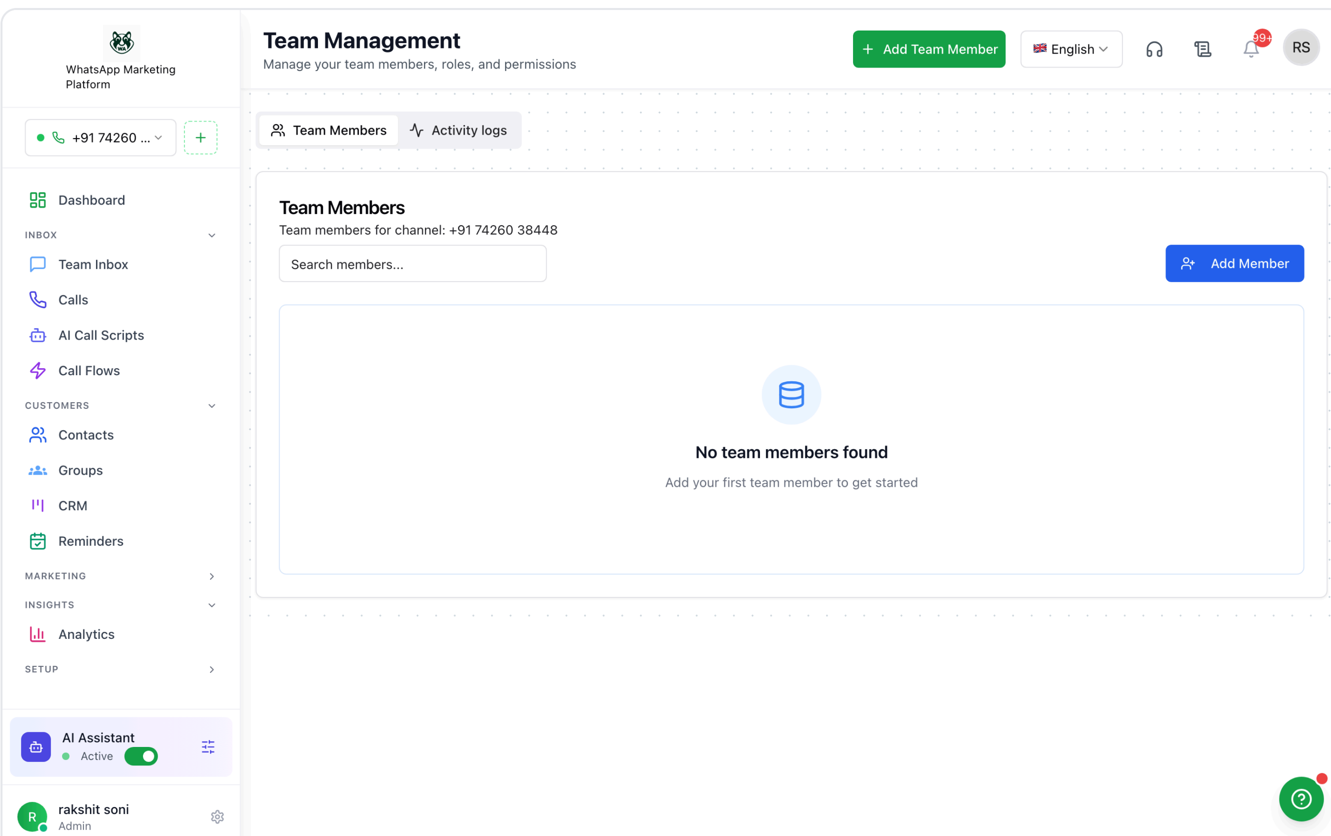
A: The reminder re-fires a bit later and reappears at the top of the alarm stack so you don't lose it.

Team management and access control

The Team feature lets you invite colleagues into your account and control exactly what each of them can do through fine-grained permissions. Team members work under your account and are scoped to the channel you assign them to. Find it under **Settings → Team**, or the **Team** entry in the left sidebar.

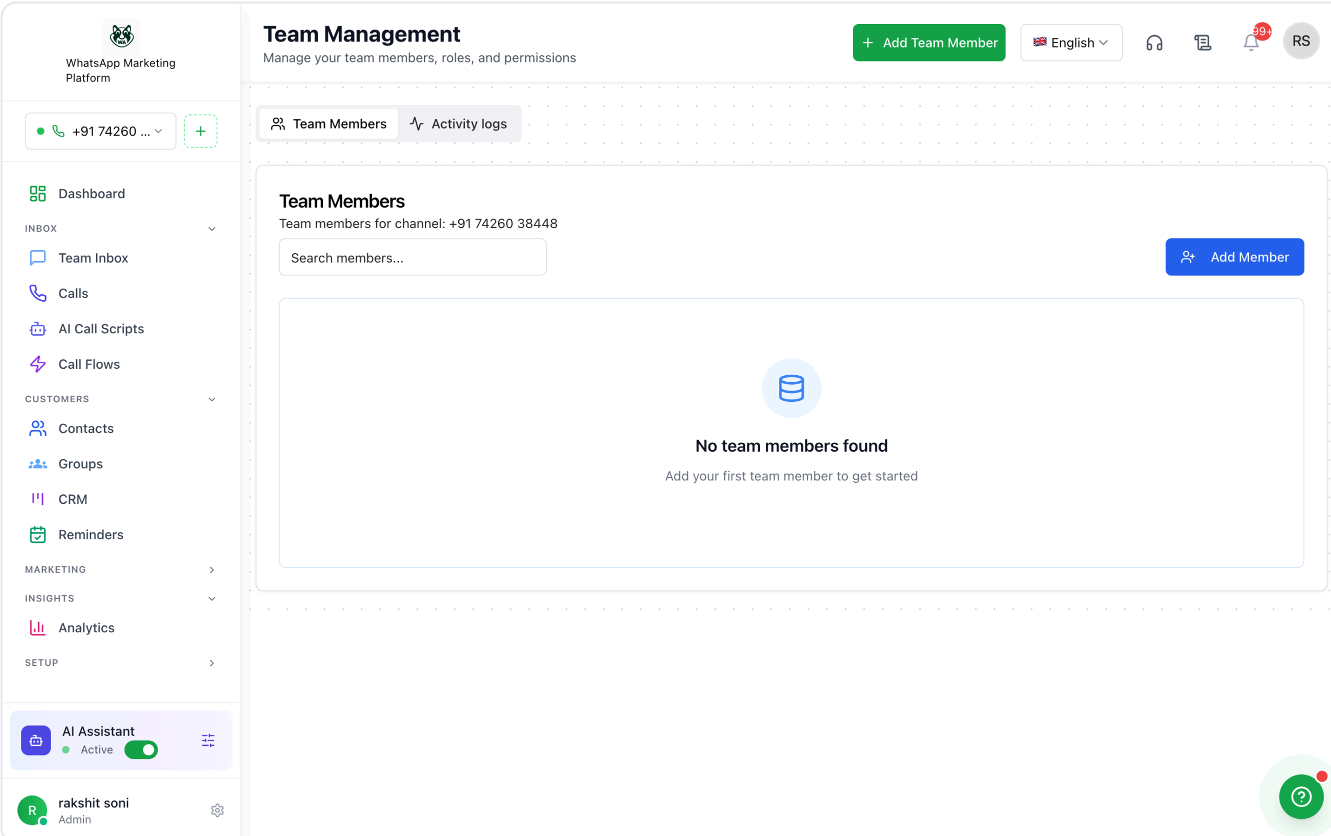
How to use (step by step)

1. **Open the Team page.** In the left sidebar click **Team** (or go to **Settings → Team**). The page opens on the **Team Members** tab, with an **Activity Logs** tab beside it. You'll see a list of everyone you've already added, each with a role badge, permission badges, status, and last-active date.



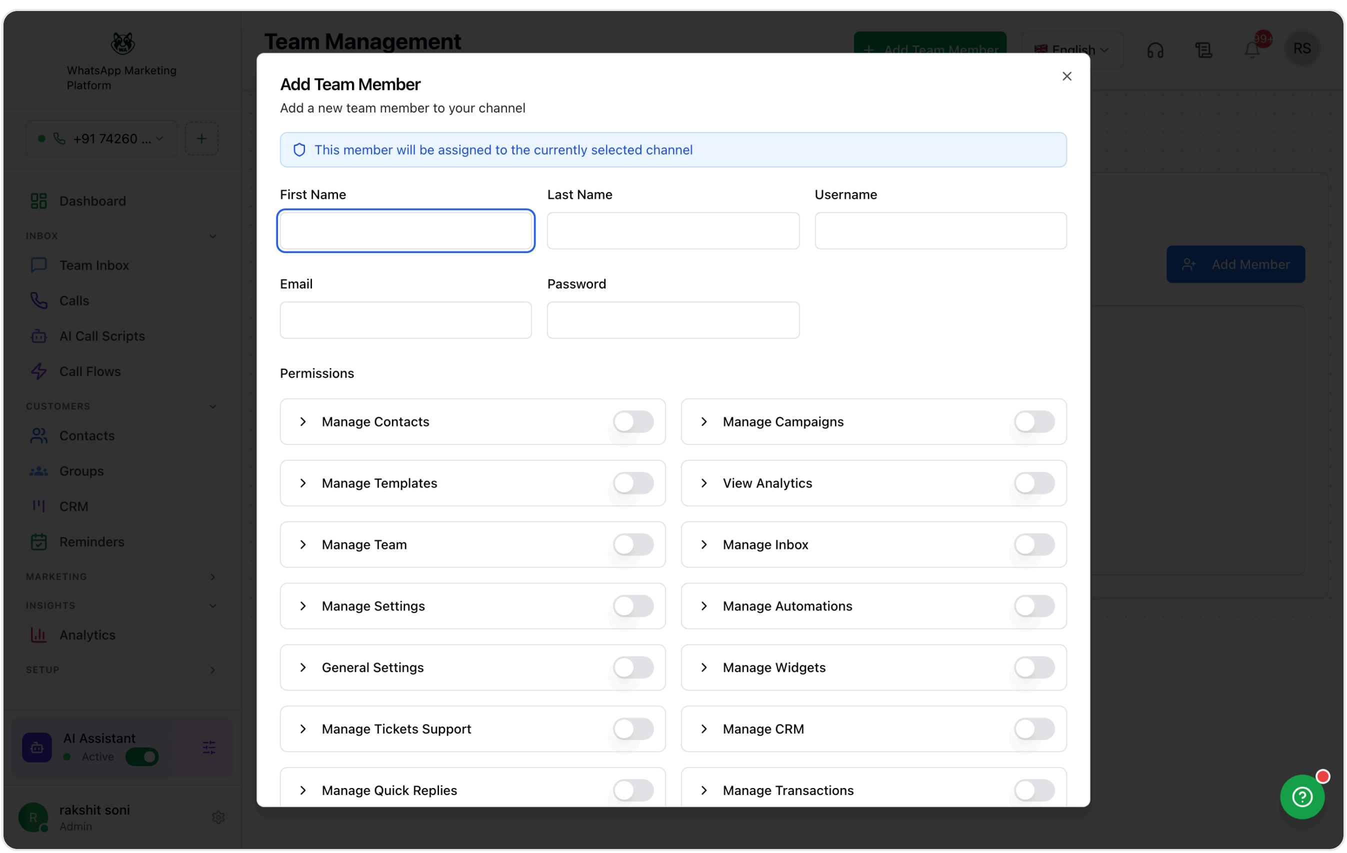
The Team page — Team Members tab with the Add Member button top-right and the Activity Logs tab

1. **Click Add Member.** Use the **Add Member** button in the top-right corner to open the new-member form.



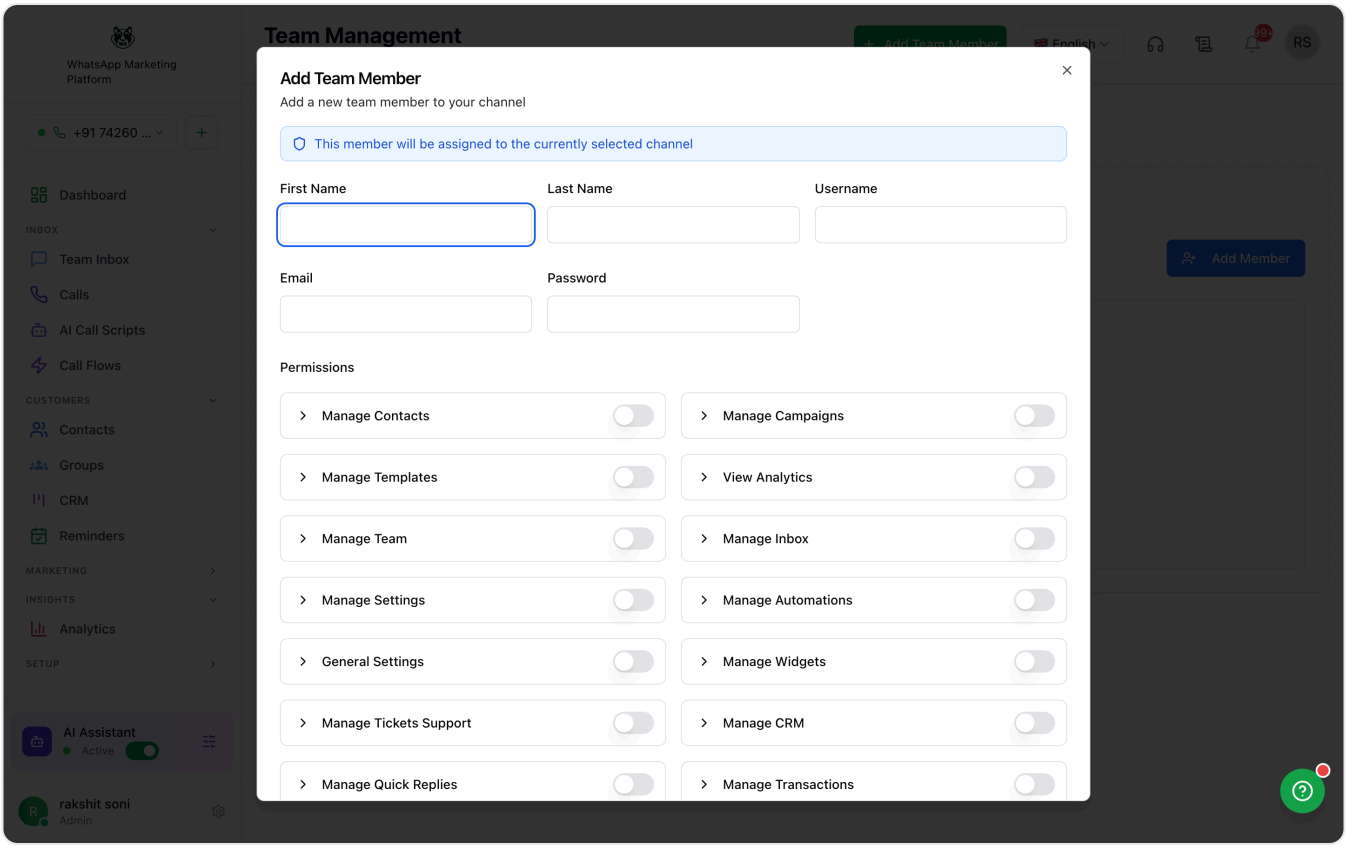
The Add Member button in the top-right of the Team Members tab

1. **Fill in the member's details.** Enter **First Name**, **Last Name**, **Username**, **Email**, and a **Password**. The password field only appears when you are creating a new member.



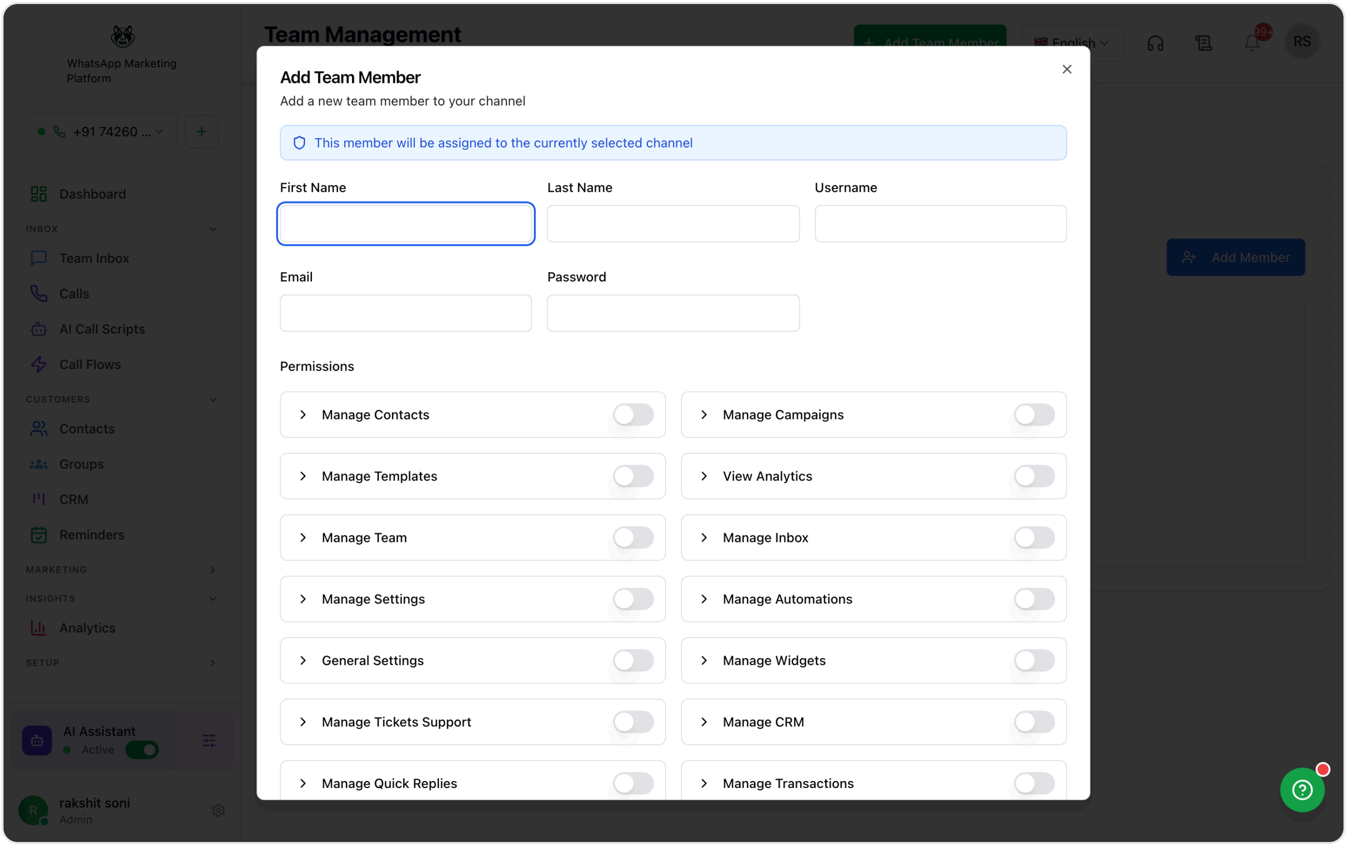
The Add Member form with First Name, Last Name, Username, Email and Password fields

1. **Confirm the channel assignment.** If a channel is selected in the header, a blue banner in the form confirms the new member will be assigned to that channel. The member is tied to this number.



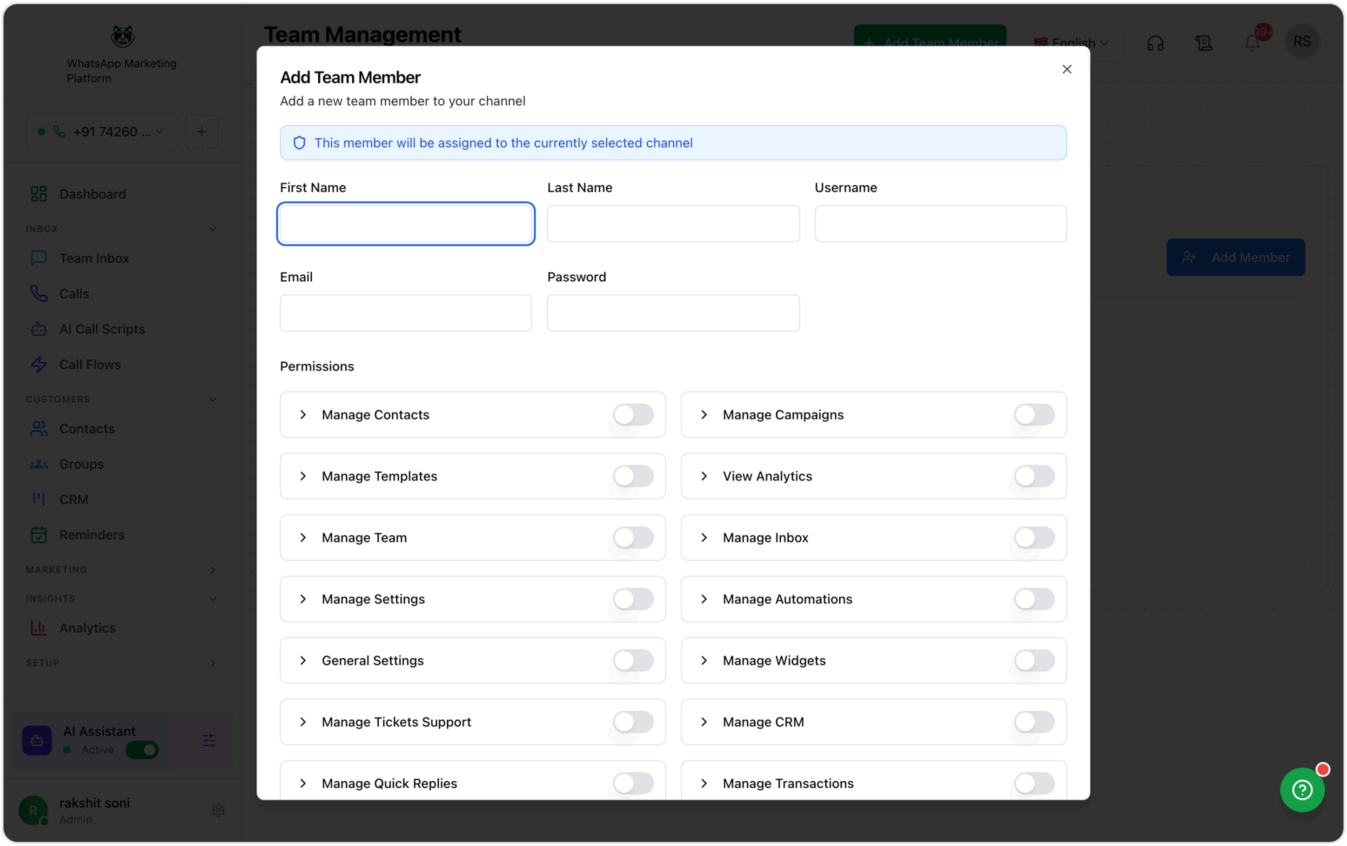
The blue banner confirming which channel the member will be assigned to

1. **Set permissions by group.** Scroll to **Permissions**. Actions are organised into groups — Contacts, Campaigns, Templates, Analytics, Team, Inbox, Settings, Automations, CRM and more. Use a group's toggle to grant the whole group at once, or click its **chevron** to expand it and pick individual actions like **View**, **Create**, **Edit**, **Delete**, **Send**, **Import** or **Export**.



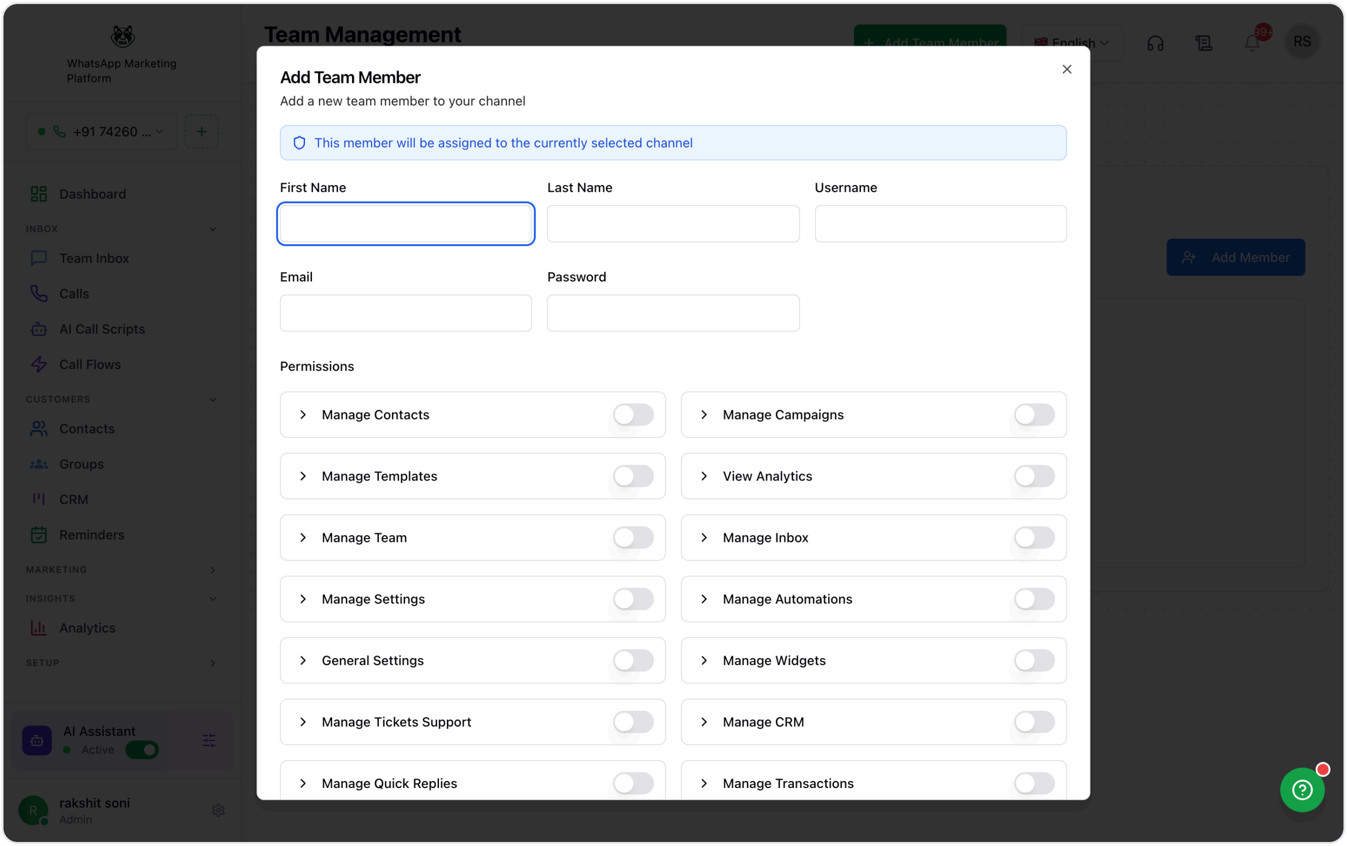
The Permissions section — group toggles and an expanded group showing View, Create, Edit and Delete checkboxes

1. **Save the member.** Click **Add Team Member** at the bottom of the form. The new person appears in the Team Members list with their permission badges and an active status.



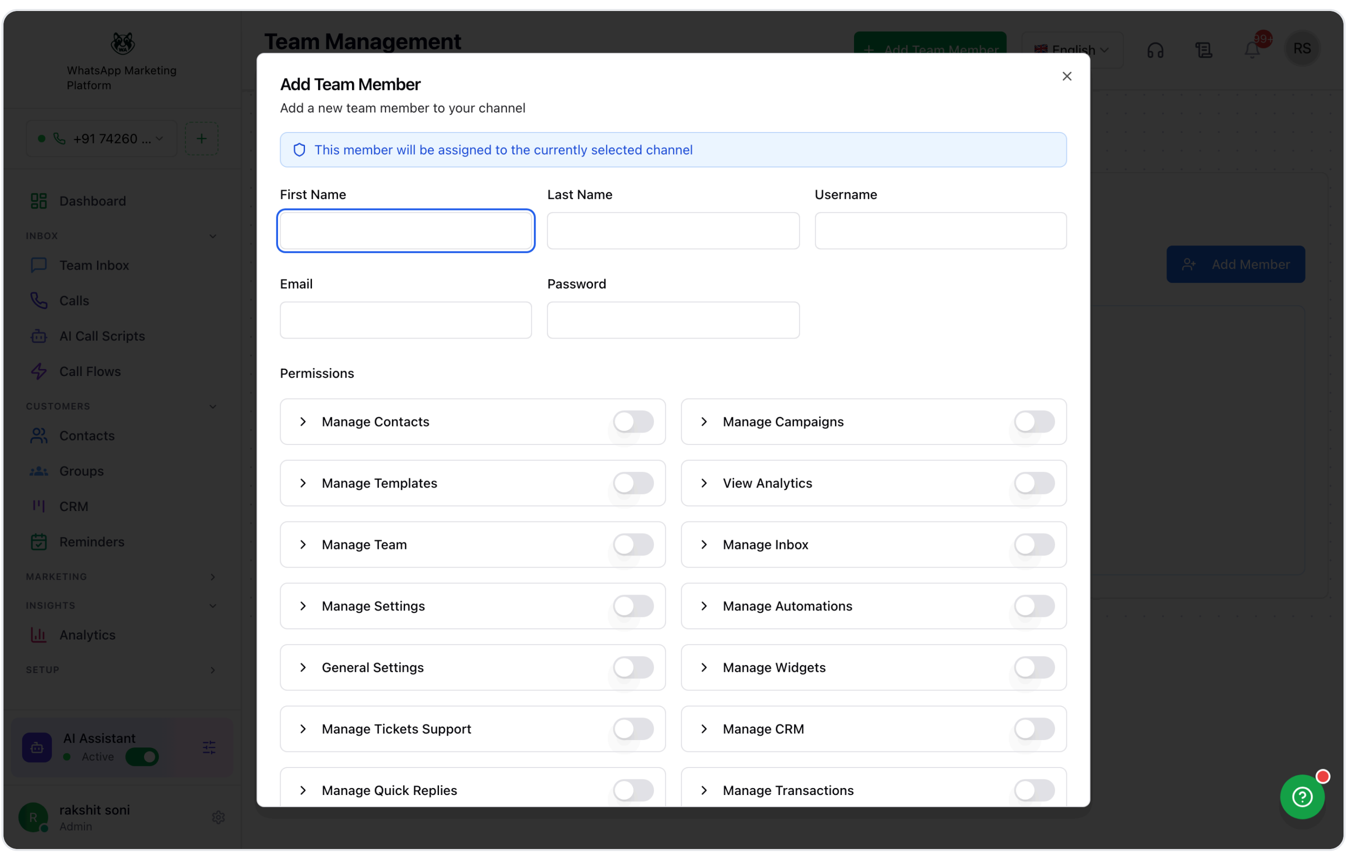
The Add Team Member button at the bottom of the form

1. **Edit or manage someone later.** On any member row, open the **⋮ menu** on the right. From here you can **Edit** the member (change details, permissions, or channel), **Activate/Deactivate** them, or **Remove** them.



The row ⋮ menu open with Edit, Activate/Deactivate and Remove options

1. **Audit changes in Activity Logs.** Switch to the **Activity Logs** tab to see who did what and when — each entry shows the member, the action, details, and a timestamp.



The Activity Logs tab listing member, action, details and timestamp columns

Tips

- Permissions map directly to features: if a member lacks `inbox:view`, they won't see the Inbox at all. Grant only what each person needs.
- Use the **search box** on the Team Members tab to find people quickly once your team grows.
- To let someone manage other teammates, grant them the **Team** group permissions (View / Create / Edit / Delete / Permissions).
- A member is scoped to the channel selected when they were added — plan the active channel in the header before clicking Add Member.

FAQ

Q: What are the roles?

A: Account owners are **admin**. Members act as a **manager** or **agent** in practice depending on the permissions you grant — managers get broad permissions, agents get a focused subset (for example, inbox only). You control access entirely through the permission checkboxes rather than a single role dropdown.

Q: Can a team member manage other team members?

A: Only if you grant them the Team group permissions (View, Create, Edit, Delete, Permissions). Without those, the Team page stays out of reach.

Q: A member is assigned to the wrong number — how do I fix it?

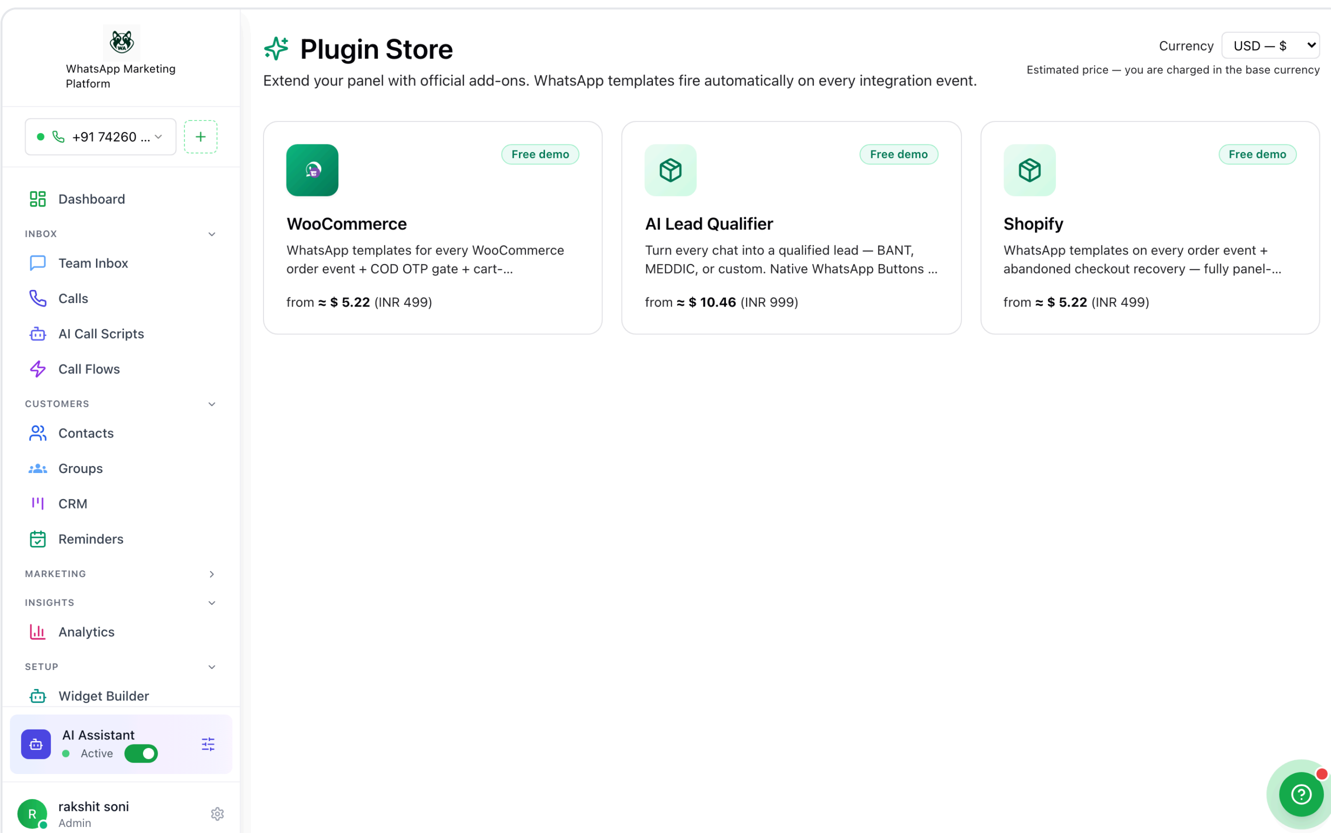
A: Each member is tied to the channel selected when they were added. Open the member's ⋮ **menu → Edit** to change their scope, or re-add them under the correct channel.

API documentation and Plugins

the platform exposes a public REST API so your own apps can send WhatsApp messages, manage contacts, and read templates and campaigns — and a Plugin Store where you browse and activate official add-ons. API keys live under **Settings → API Key Setting**; add-ons live under **Plugins** in the left sidebar.

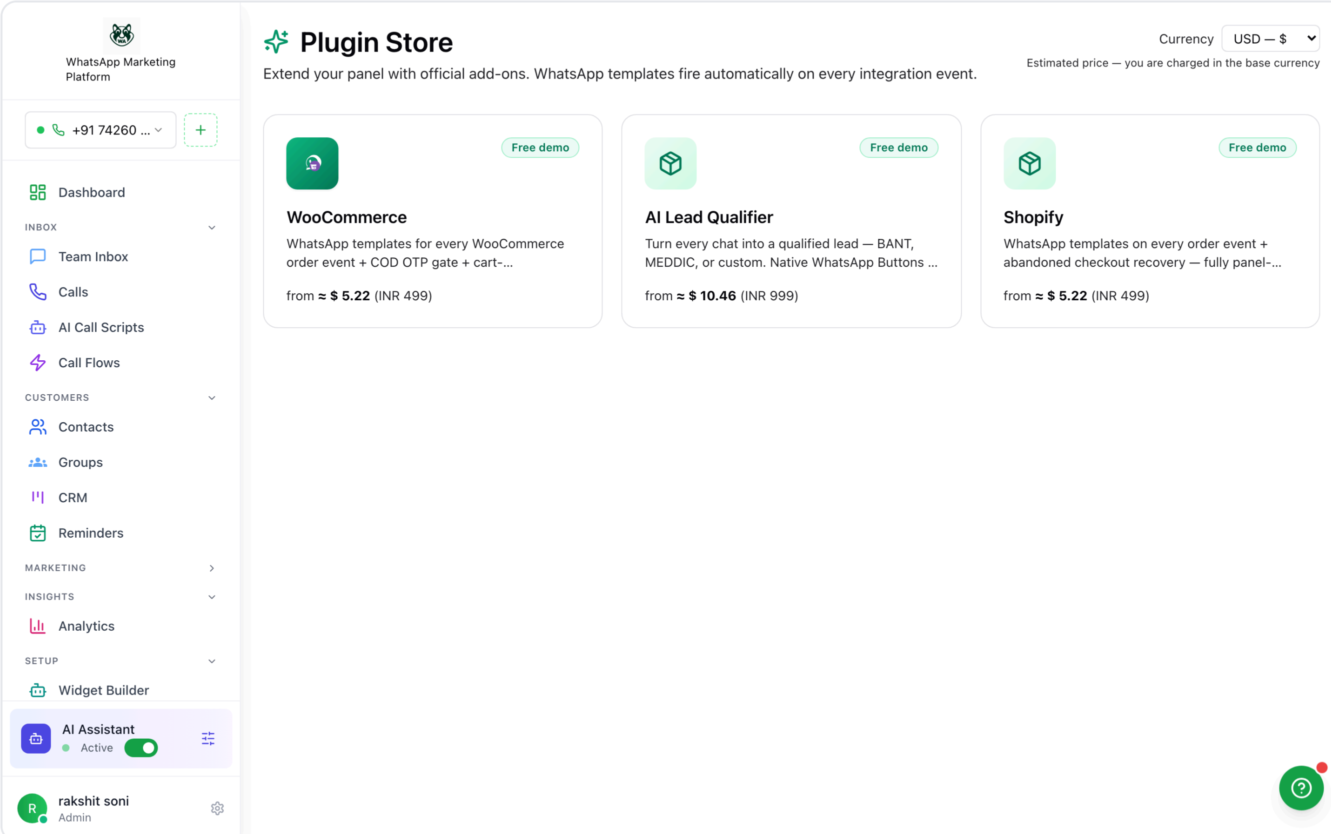
How to use (step by step)

1. **Open API Key Setting.** Go to **Settings → API Key Setting** (the key icon). The page shows usage stats — total requests, monthly requests, active keys, and revoked keys — along with your existing keys and inline quick-start docs.



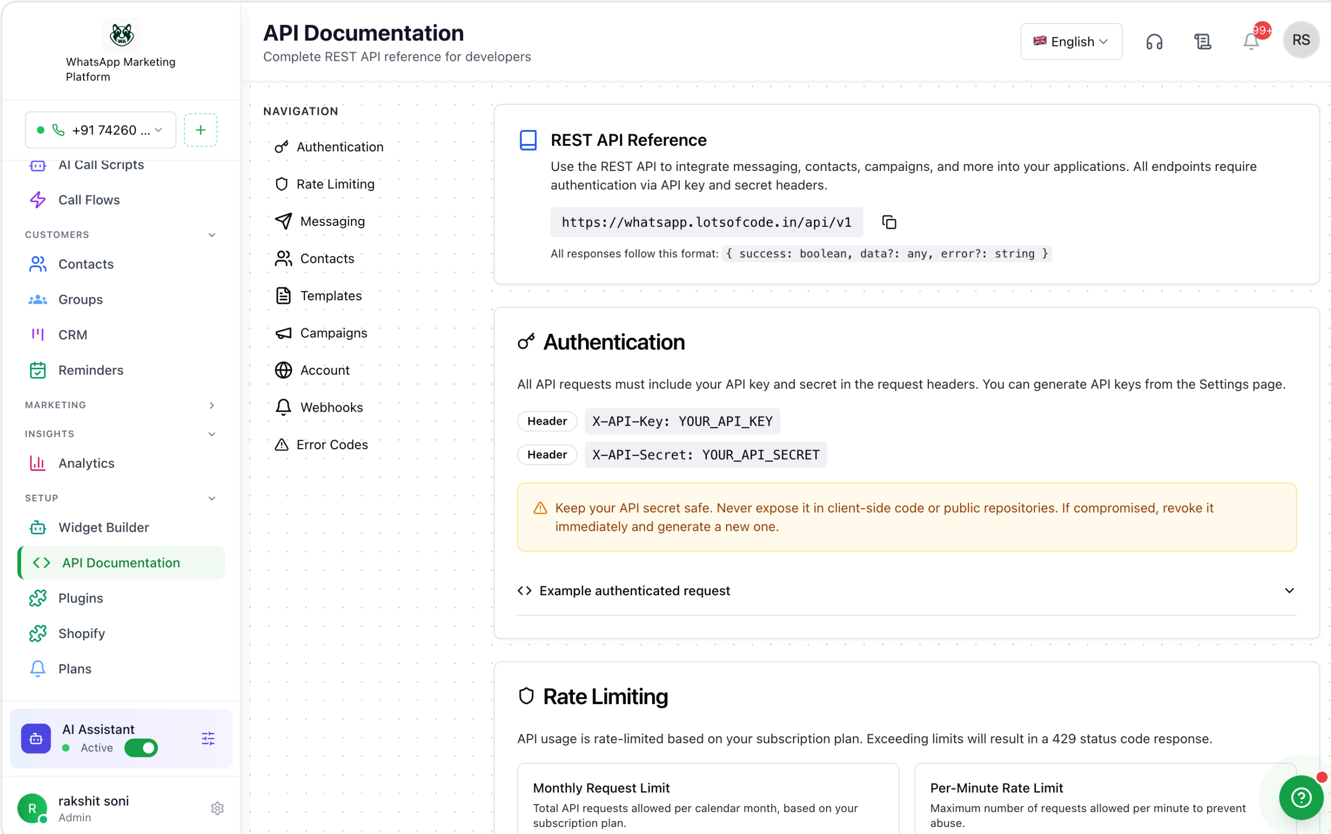
The API Key Setting page — usage stat cards, existing keys, and the Create API Key button

1. **Create a key.** Click **Create API Key** (or **Create Your First API Key** if you have none). In the dialog, enter a **Key Name** to identify it, such as "Zapier integration", and choose a **Channel** — leave it as **All Channels** or restrict the key to one number.



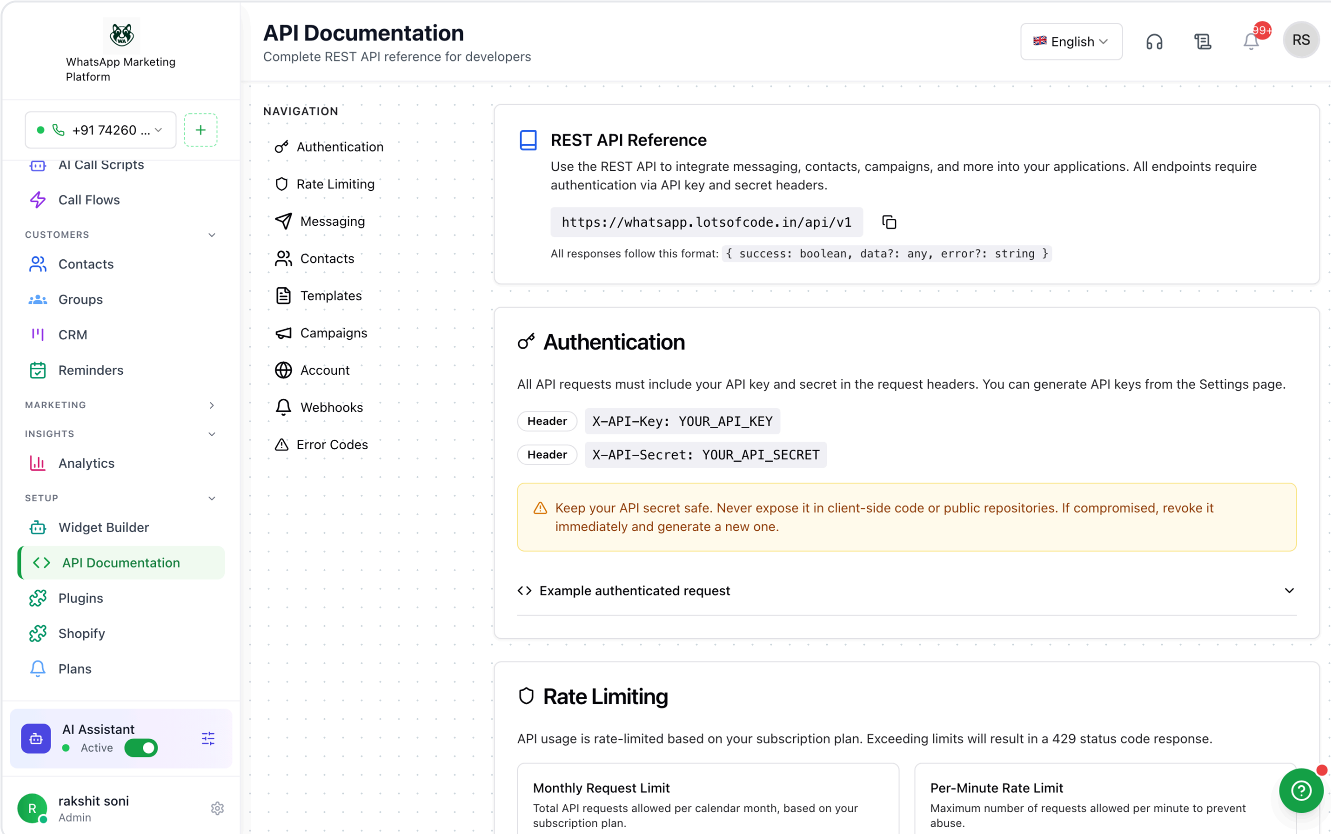
The Create API Key dialog with Key Name and Channel fields

1. **Pick permissions, then create.** Select the **Permissions** the key should have — `messages.send`, `messages.read`, `contacts.read`, `contacts.write`, `templates.read`, `campaigns.read`, `account.read`, `webhooks.manage`. All are pre-checked; uncheck what you don't need, then click **Create Key**.



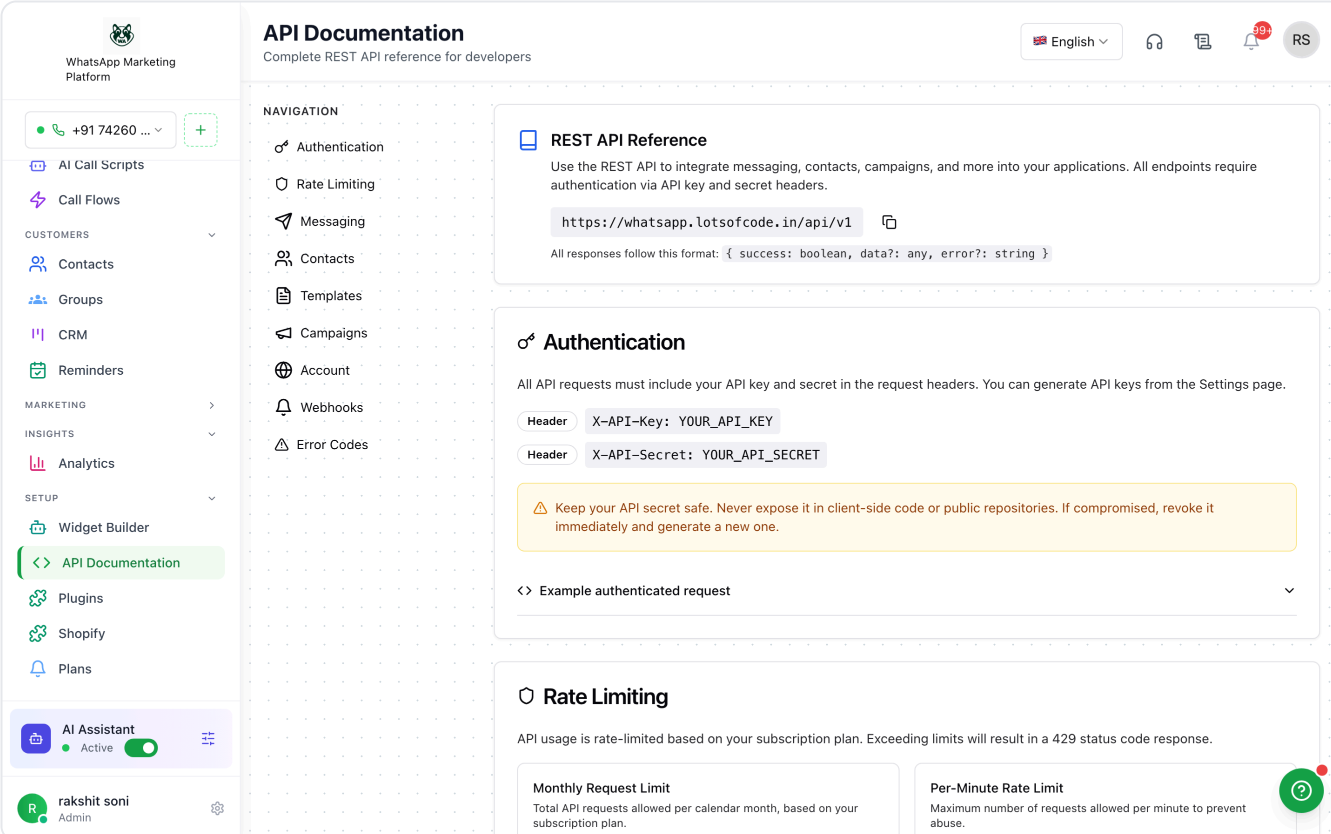
The Permissions checkboxes, all pre-checked, with the Create Key button

1. **Copy the key and secret now.** A dialog shows the **API Key** and **API Secret** once. Copy both immediately — the secret is never shown again. Authenticate every request with the `x-api-key` and `x-api-secret` headers against the base URL `https://<your-domain>/api/v1`.



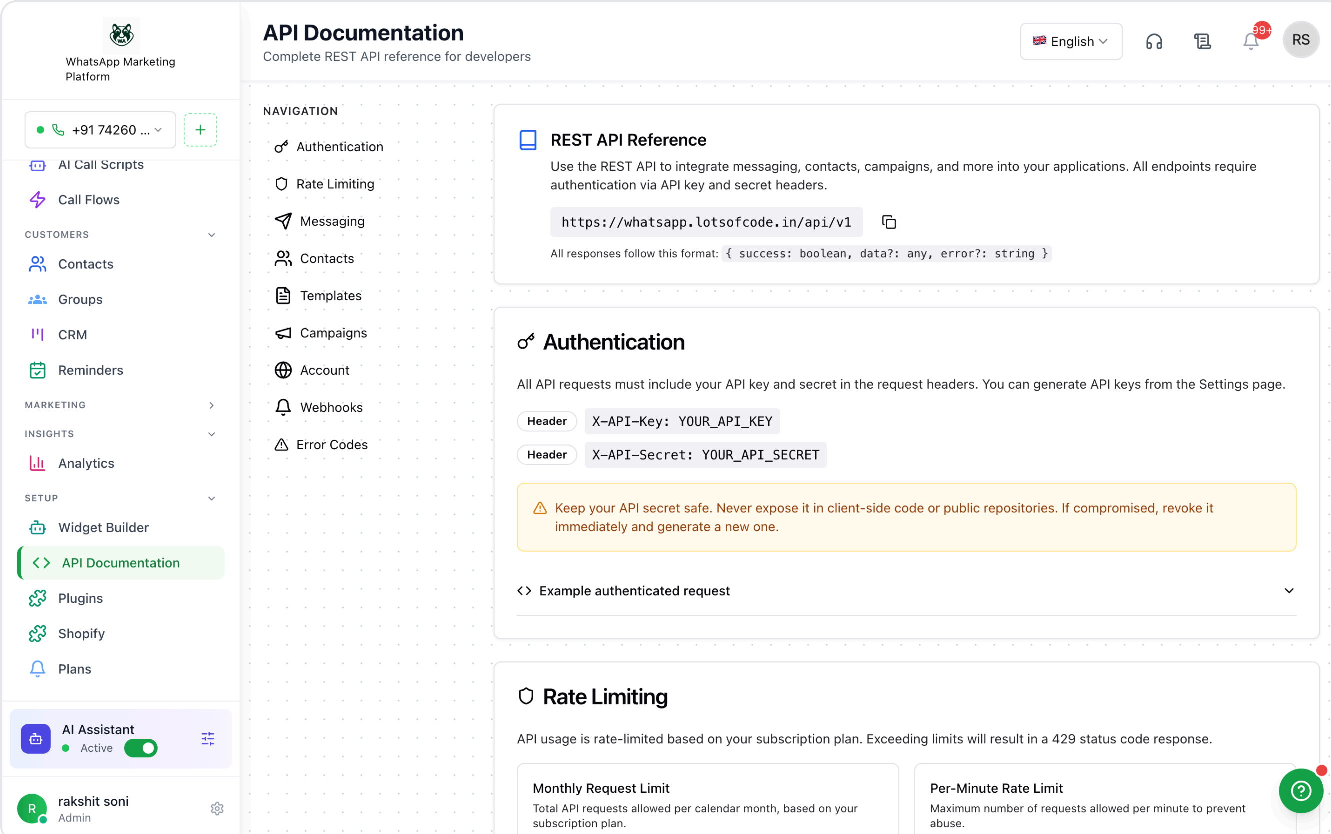
The dialog showing the API Key and API Secret with copy buttons and a one-time warning

1. **Read the full API reference.** Open `/api-docs` in the app for the complete endpoint list — sending template and reply messages, fetching message history and delivery status, managing contacts, listing templates and campaigns, and managing webhooks. To disable a key later, click **Revoke** on its row (immediate and permanent).



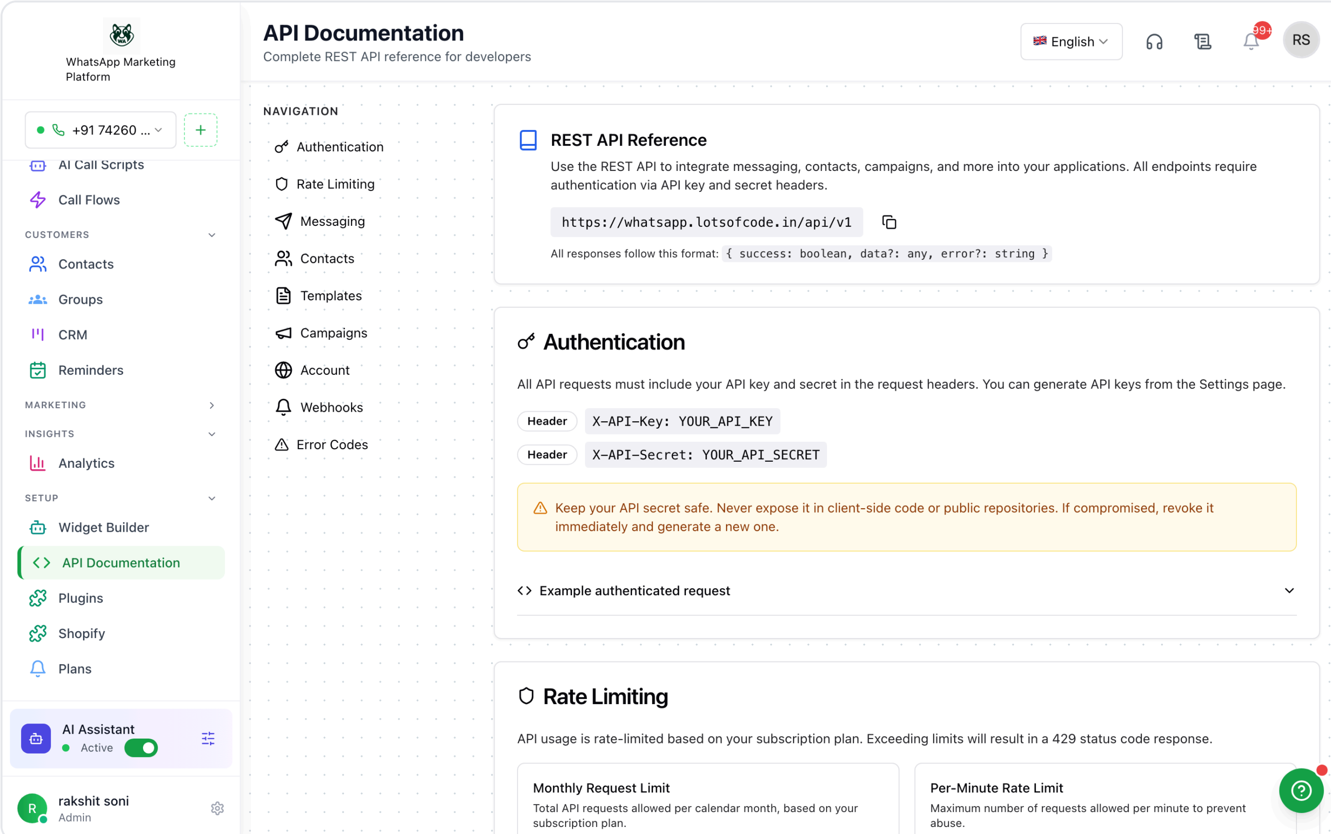
The /api-docs page listing endpoints, headers and example requests

1. **Browse the Plugin Store.** Click **Plugins** in the sidebar (or go to `/plugins`). You'll see a grid of plugin cards — each shows the plugin name, a tagline, an **Active / Free demo / Paid add-on** badge, and the starting price.



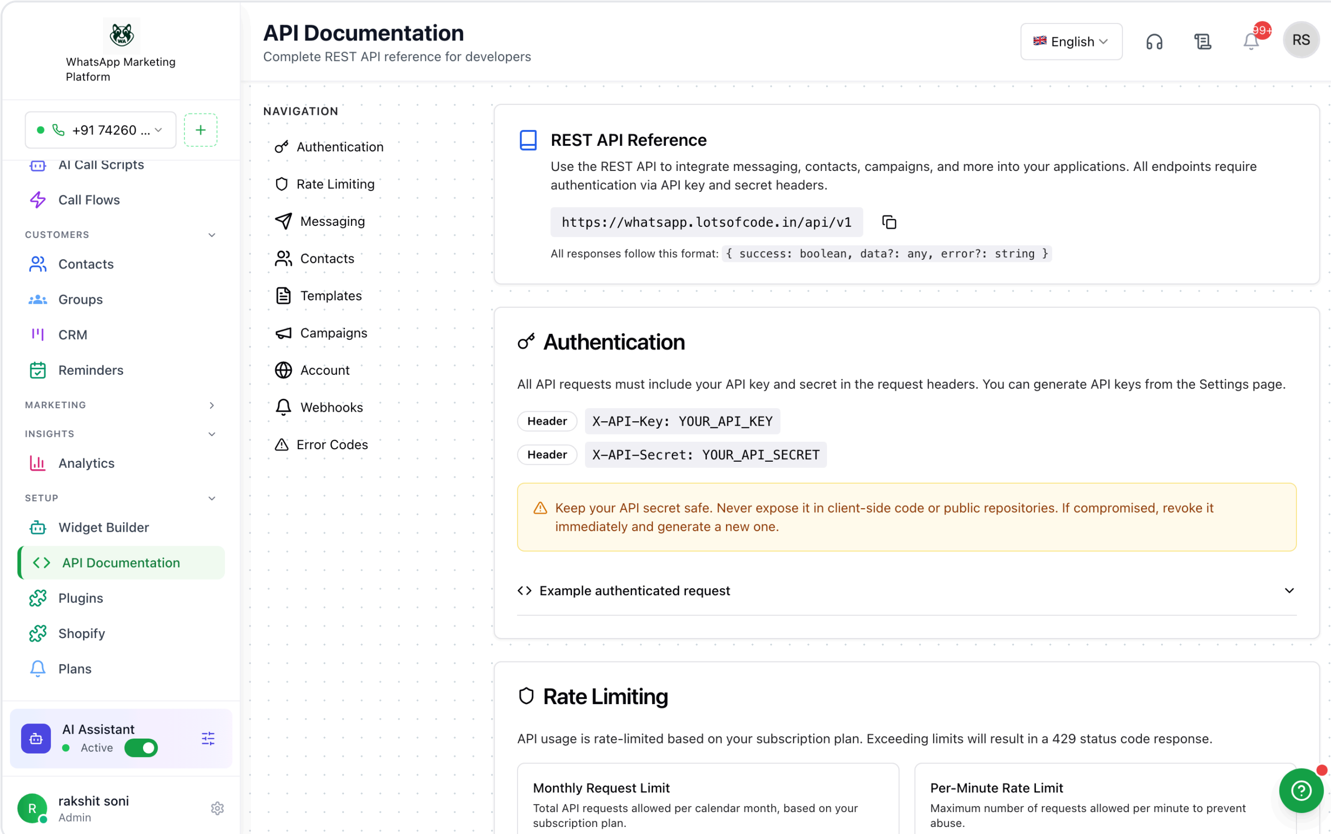
The Plugin Store — a grid of plugin cards with badges and starting prices

1. **Open a plugin and pick a tier.** Click a card to open its detail page with three tabs — **Description**, **Installation**, and **FAQ**. In the right sidebar, choose a **pricing tier**; each shows a duration in days and a price. A free demo tier, where available, is preselected.



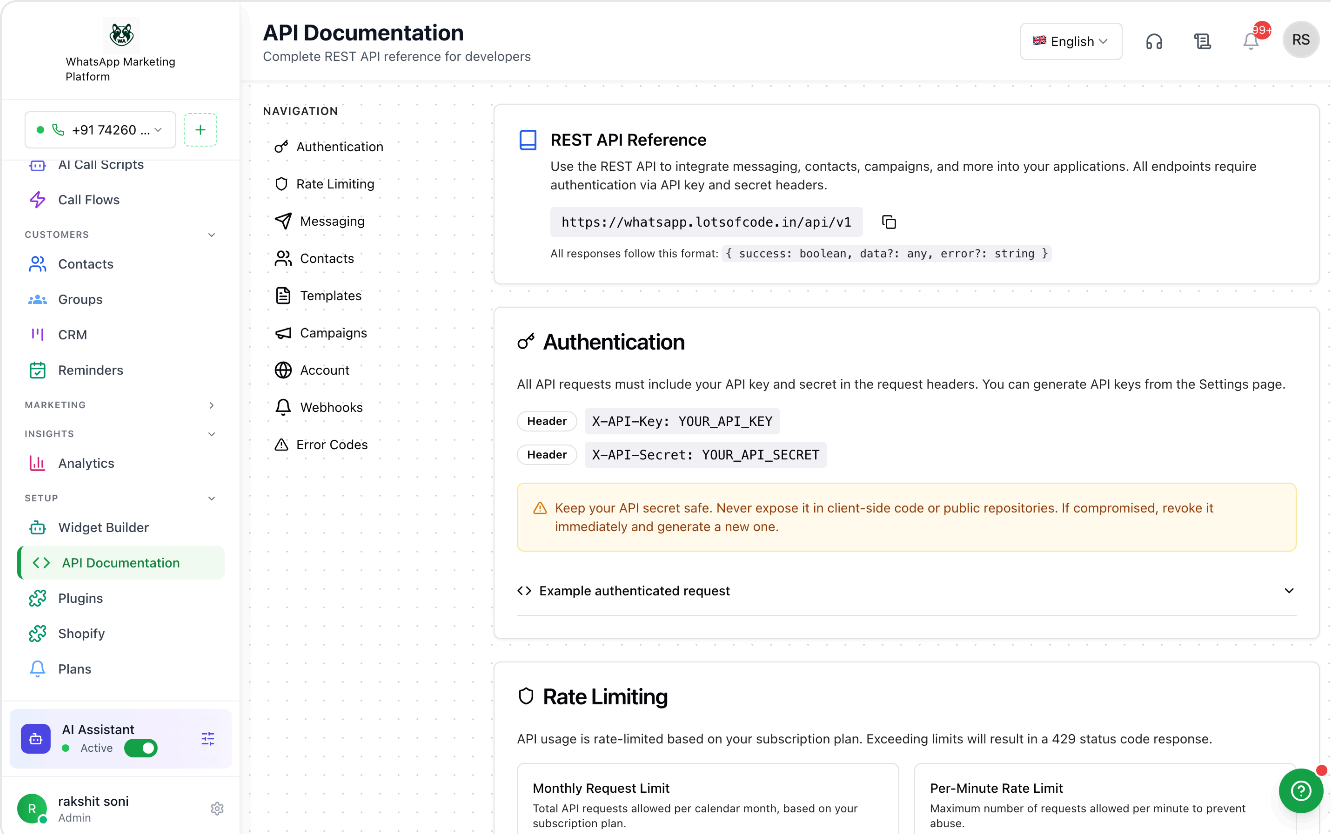
A plugin detail page — Description/Installation/FAQ tabs and the pricing tiers in the right sidebar

1. **Request the license.** Click **Request on WhatsApp**. This opens WhatsApp with a pre-filled message containing the plugin name, the tier you chose, and your account email. Complete payment with the sales team.



The Request on WhatsApp button in the plugin's pricing sidebar

1. **Use it once activated.** After activation the license shows as **Active** with an expiry date. Panel-only add-ons (Shopify, AI Lead Qualifier, Lead Routing & Departments) need no download — configure them inside the panel. Downloadable plugins (WooCommerce) show a **Download .zip** button to install in WordPress.



A plugin showing the Active badge, expiry date, and a Download .zip button

Available add-ons

- **AI Lead Qualifier** (in-panel) — turns WhatsApp chats into a scored sales funnel: BANT/MEDDIC or custom qualifying questions, 0-100 lead scoring, auto CRM-stage moves, 16 industry presets, and per-outcome action chains. **Now also includes Appointment Booking** — a Calendly-for-WhatsApp scheduling system: a public `/book/…` page on your own domain where customers self-book from your live availability, multi-agent round-robin hosting, automatic WhatsApp confirmation + reminder messages, holiday/blackout dates, a custom booking form, and anti-fake protection (contact-verified invite links + WhatsApp **OTP** for open bookings). Configure both under **Lead Qualifier** and **Appointments** in the sidebar.
- **Lead Routing & Departments** (in-panel) — turns your inbox into a contact center: round-robin auto-assign every new chat, lead and call; agent **departments** (Sales, Support, Delivery...); restrict agents to only their own conversations; transfer chats or live calls; plus automation nodes (round-robin assign, send a template to any number, add/remove tags). Configure under **Lead Routing** in the sidebar.
- **Native Forms Pro** (in-panel) — upgrades the built-in **WhatsApp Forms** with *dynamic, live* forms that talk to your data in real time. Its headline is **Live appointment**

booking: a native in-chat form that shows your genuine free dates and times (from your Appointments availability) and books the slot instantly — no web page, no back-and-forth. Enable it once per channel from the **Forms** page (a one-time secure key setup), then create a **Live appointment form** tied to an appointment type. Regular (static) forms stay free for everyone; the dynamic tier is the paid add-on.

- **Shopify / WooCommerce** — order and abandoned-cart recovery flows for your store (Shopify is in-panel; WooCommerce is a downloadable `.zip` for WordPress).

Each add-on is licensed to your account; activate a tier from the Plugin Store as in the steps above.

Tips

- Base URL is `https://<your-domain>/api/v1`; send `x-api-key: YOUR_API_KEY` and `x-api-secret: YOUR_API_SECRET` on every request.
- Each key tracks its request count and last-used date, and your plan can cap requests per month and rate limit per minute — heavy usage may hit those limits.
- Read each plugin's **Installation** tab and **FAQ** — they hold plugin-specific scopes, API keys, and troubleshooting steps.
- A license is bound to your account; the WooCommerce `.zip` can be installed on multiple sites.

FAQ

Q: I lost my API secret — can I see it again?

A: No. Secrets are shown only at creation. Revoke the key and create a new one.

Q: How do I limit a key to one number?

A: Pick that channel in the **Channel** dropdown when creating the key instead of leaving it on All Channels.

Q: How do I pay for a plugin — the "Request on WhatsApp" button is missing?

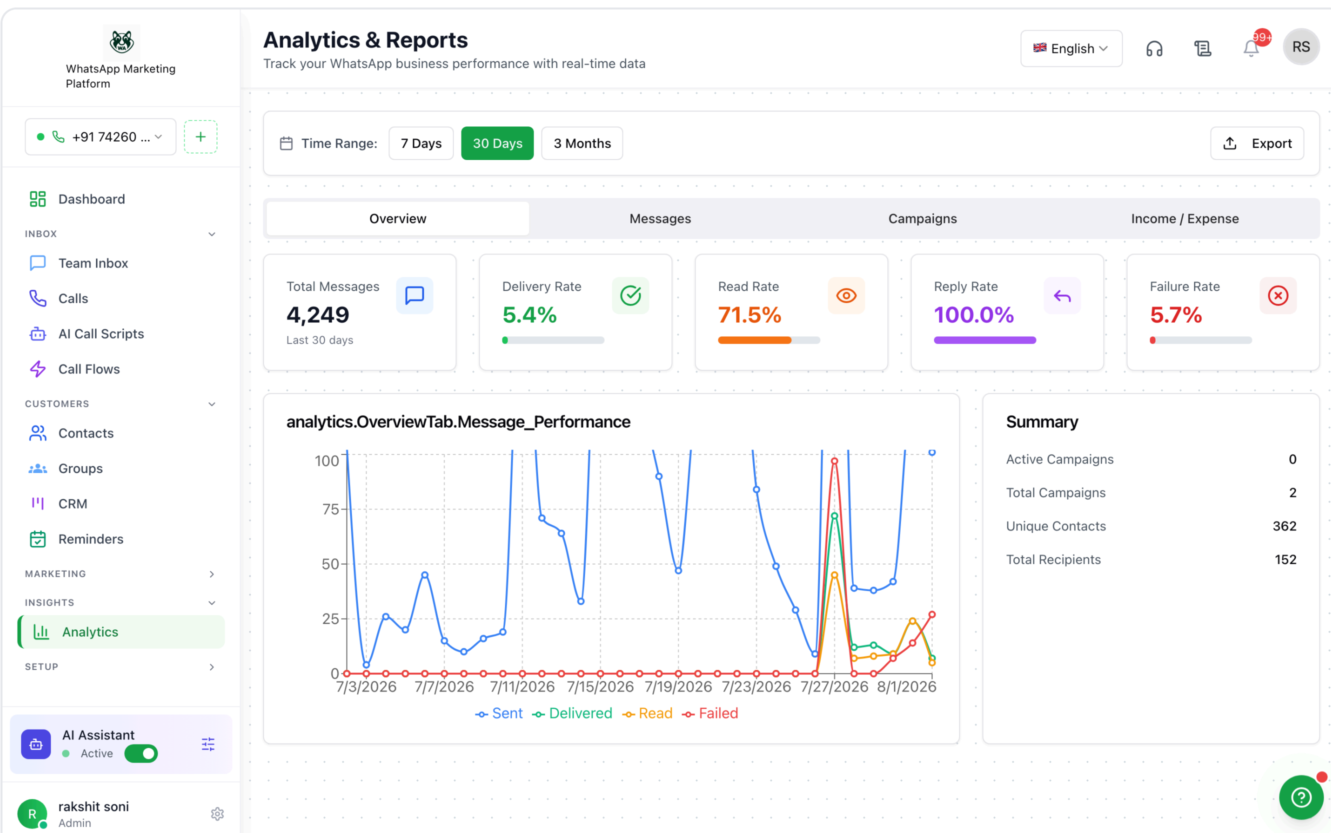
A: There's no in-panel checkout; the team handles payment and activation after you click **Request on WhatsApp**. If the button is missing, the sales WhatsApp numbers aren't configured yet — ask your admin to set them in Settings.

Analytics

Analytics shows how your messages and campaigns are performing — how many were delivered, read, replied to, or failed. There's an account-wide **Analytics** dashboard in the left sidebar (`/analytics`), a per-campaign page with a recipient-by-recipient report, and a **Message Logs** tab under Settings for per-message debugging.

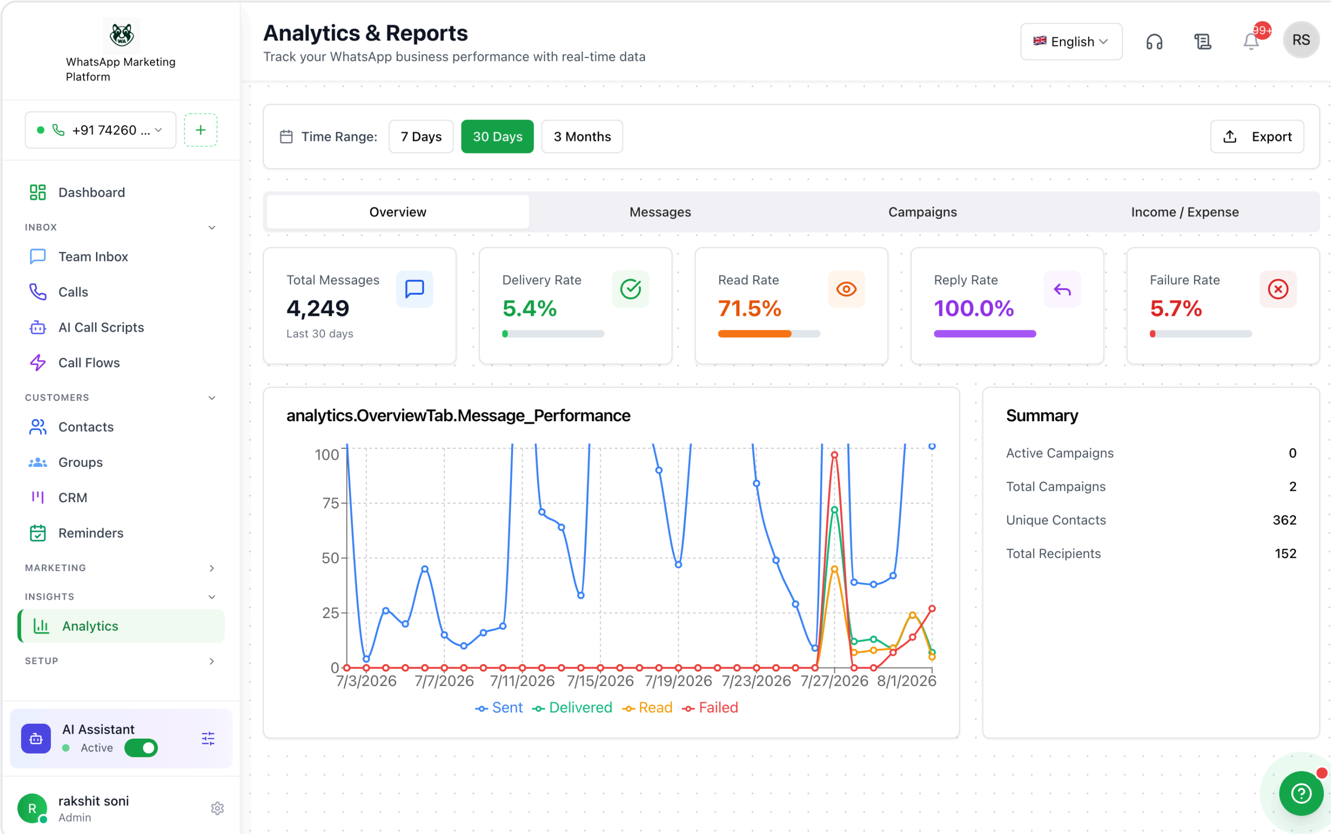
How to use (step by step)

1. **Open the Analytics dashboard.** Click **Analytics** in the left sidebar (`/analytics`). At the top, pick a **time range** — **7 Days**, **30 Days**, or **3 Months** — which scopes every tab below it.



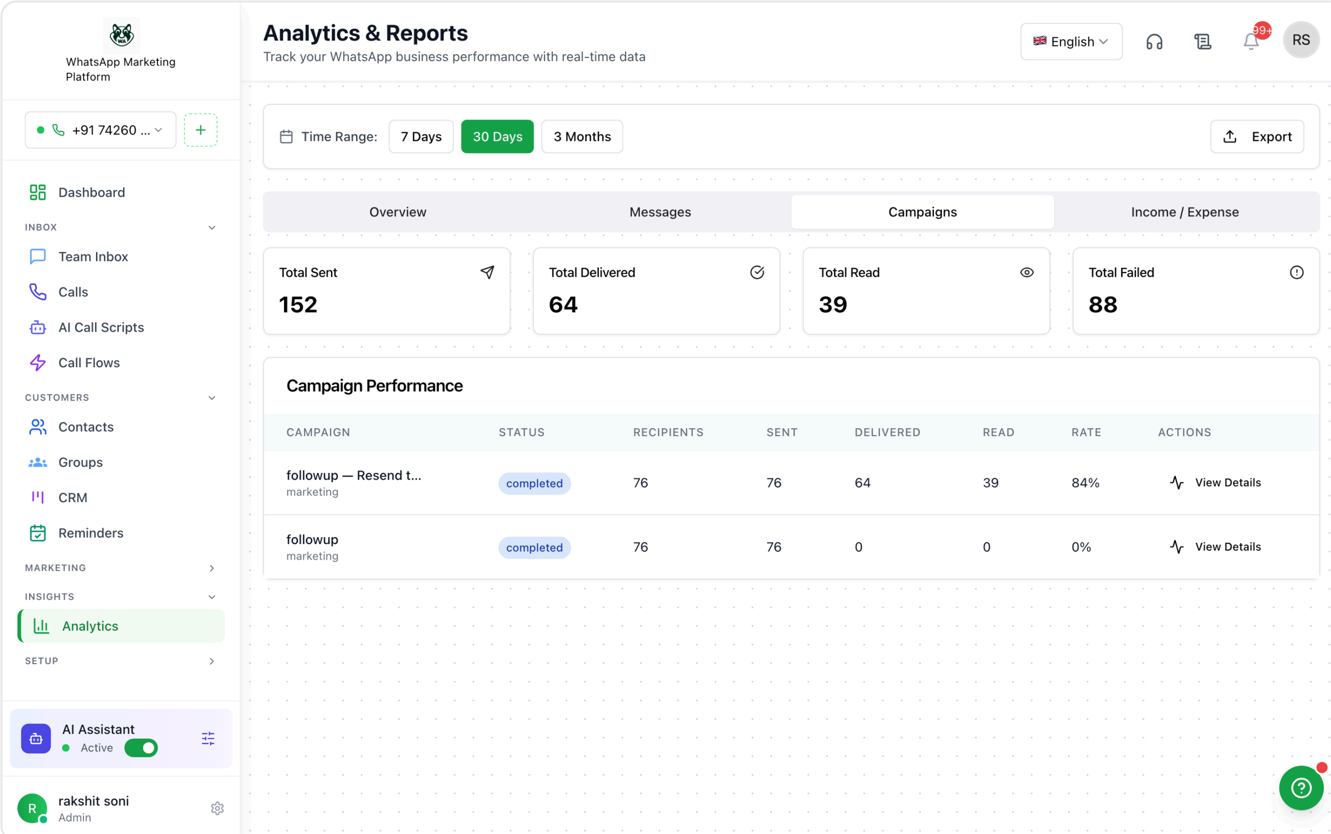
The Analytics dashboard — the 7 Days / 30 Days / 3 Months time-range selector at the top

1. **Read the Overview tab.** The **Overview** tab shows the key rate cards — **Delivery**, **Read**, **Reply**, and **Failure** — plus a message-performance chart and a campaign summary.



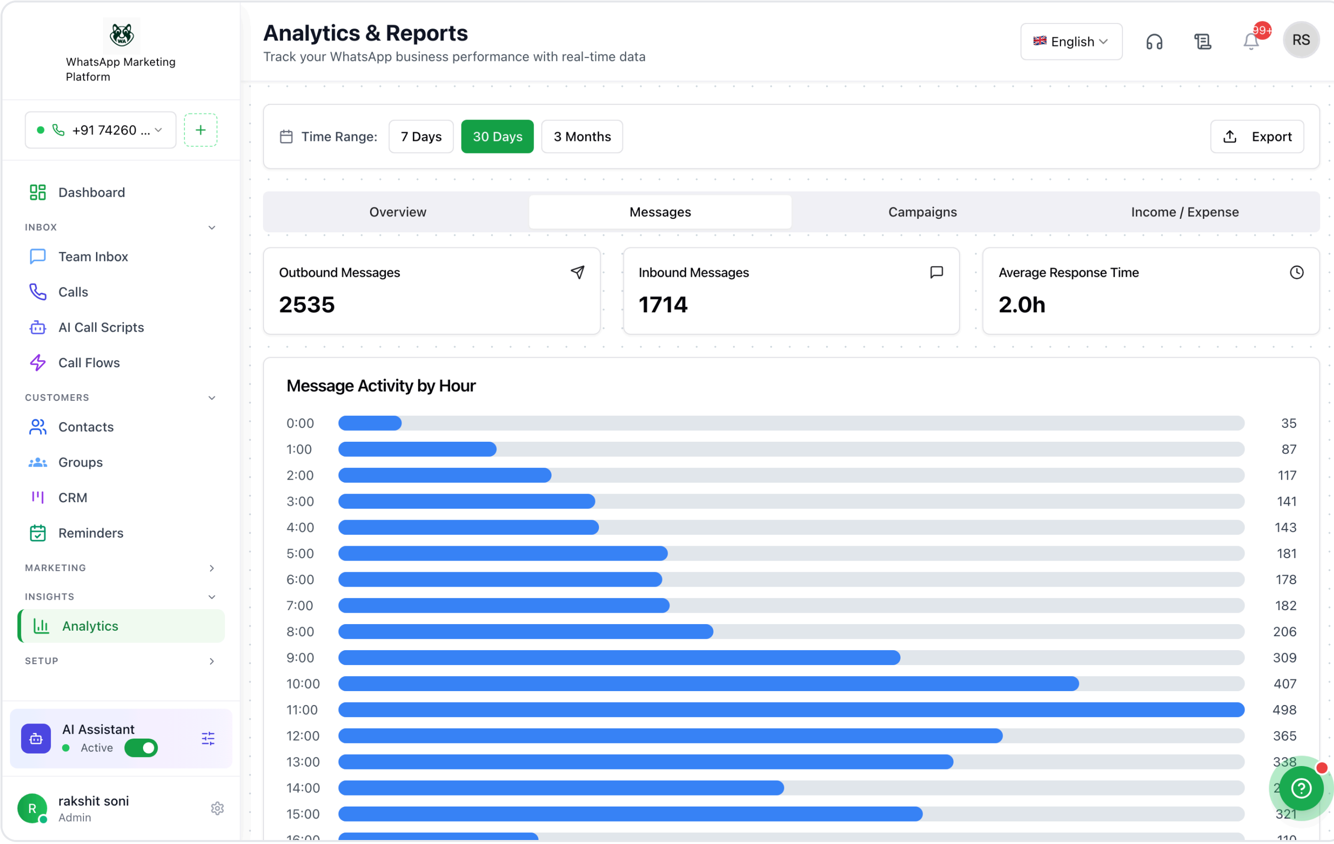
The Overview tab — Delivery, Read, Reply and Failure rate cards above the performance chart

1. **Check Messages and Transactions.** The **Messages** tab shows outbound vs inbound counts, average response time, and activity by hour. The **Transactions** tab gives income/expense reporting if you log contact transactions. Where enabled, use **Export** to download the data as PDF or Excel.



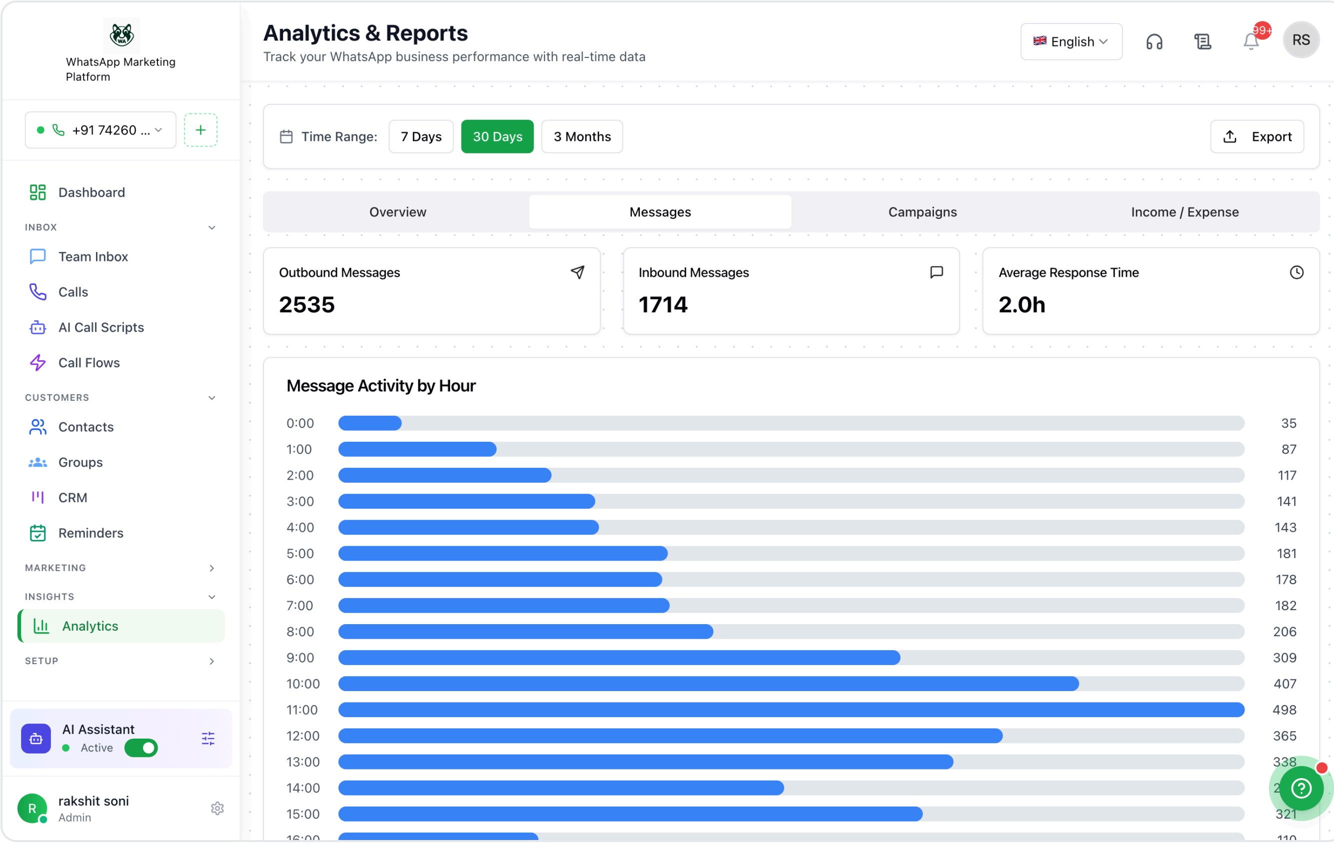
The Messages tab — outbound vs inbound counts, average response time and activity-by-hour chart

1. **Open the Campaigns tab.** The **Campaigns** tab lists every campaign with recipients, sent, delivered and read counts, and a delivery rate. Click **View Details** on any row to drill into that campaign.



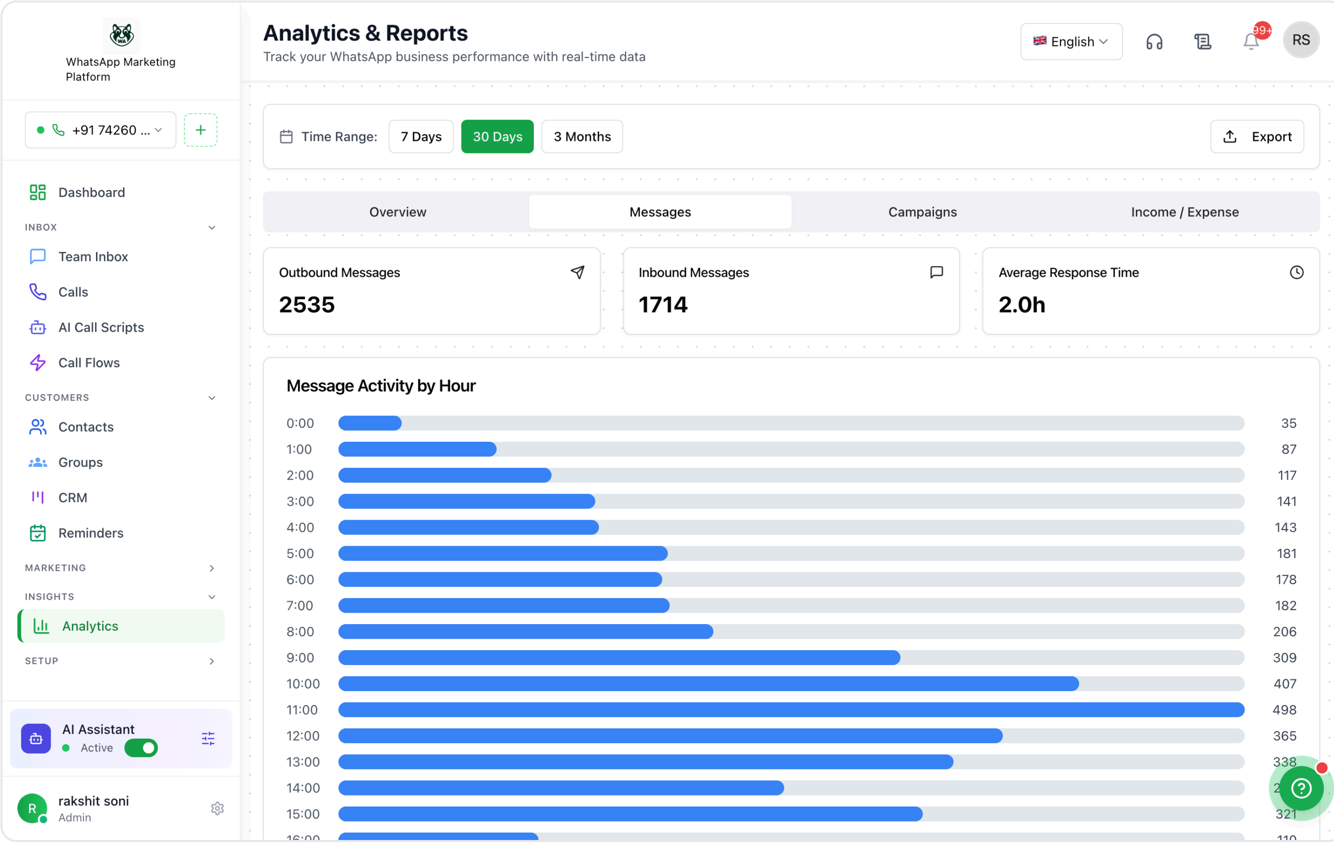
The Campaigns tab — a table of campaigns with counts and a View Details link per row

1. **Read the per-campaign metric cards.** The per-campaign page (`/analytics/campaign/<id>`) opens with top cards — **Recipients**, **Reached Meta**, **Delivery Rate**, **Read Rate**, and **Failure Rate**. This page auto-refreshes while the campaign is running.



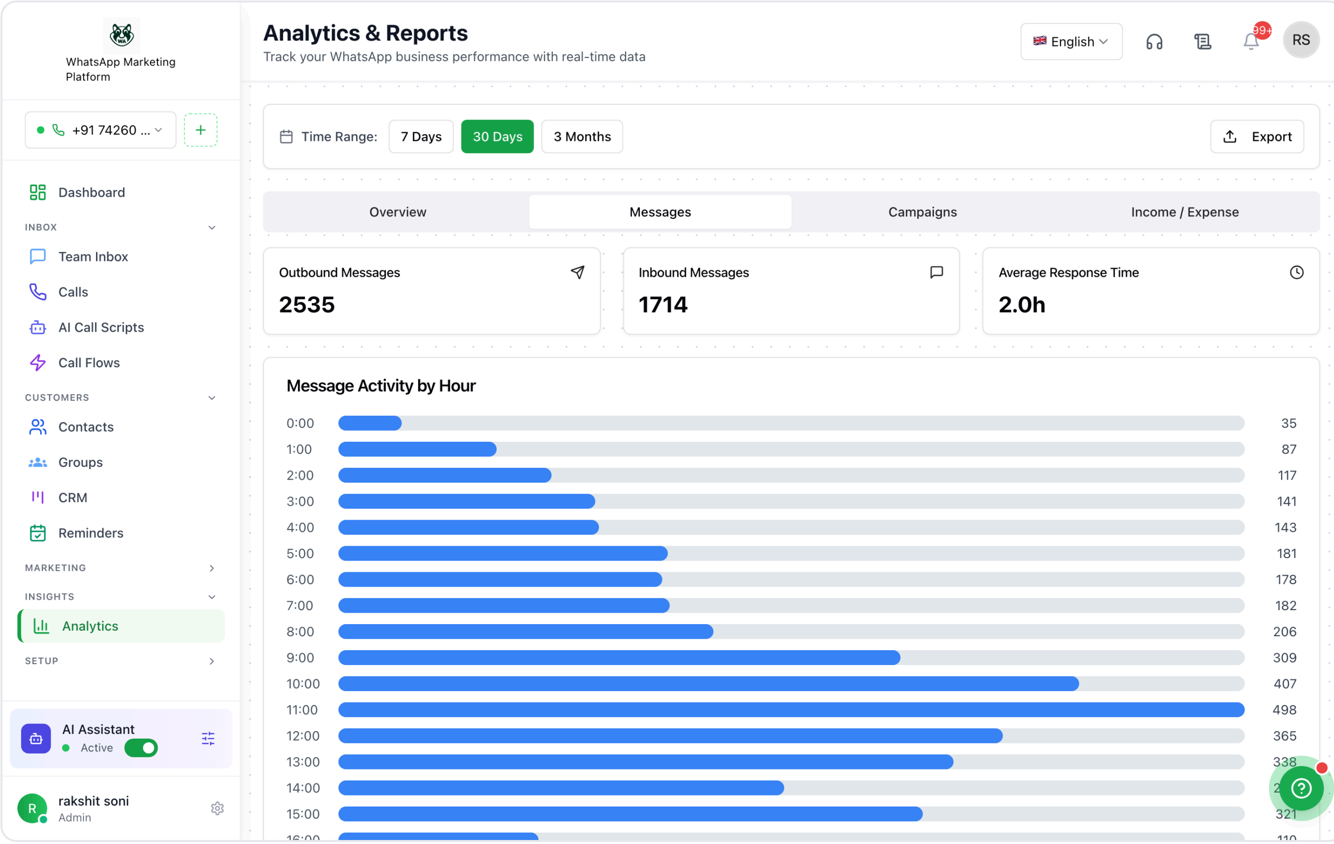
The per-campaign page top cards — Recipients, Reached Meta, Delivery Rate, Read Rate and Failure Rate

1. **Use the charts and Error Analysis.** Below the cards, the **Daily Performance** chart and **Message Status Distribution** show trends and the sent/delivered/read/failed split. **Error Analysis** groups failures by Meta error code with occurrence counts, so one repeated code points to one root cause.



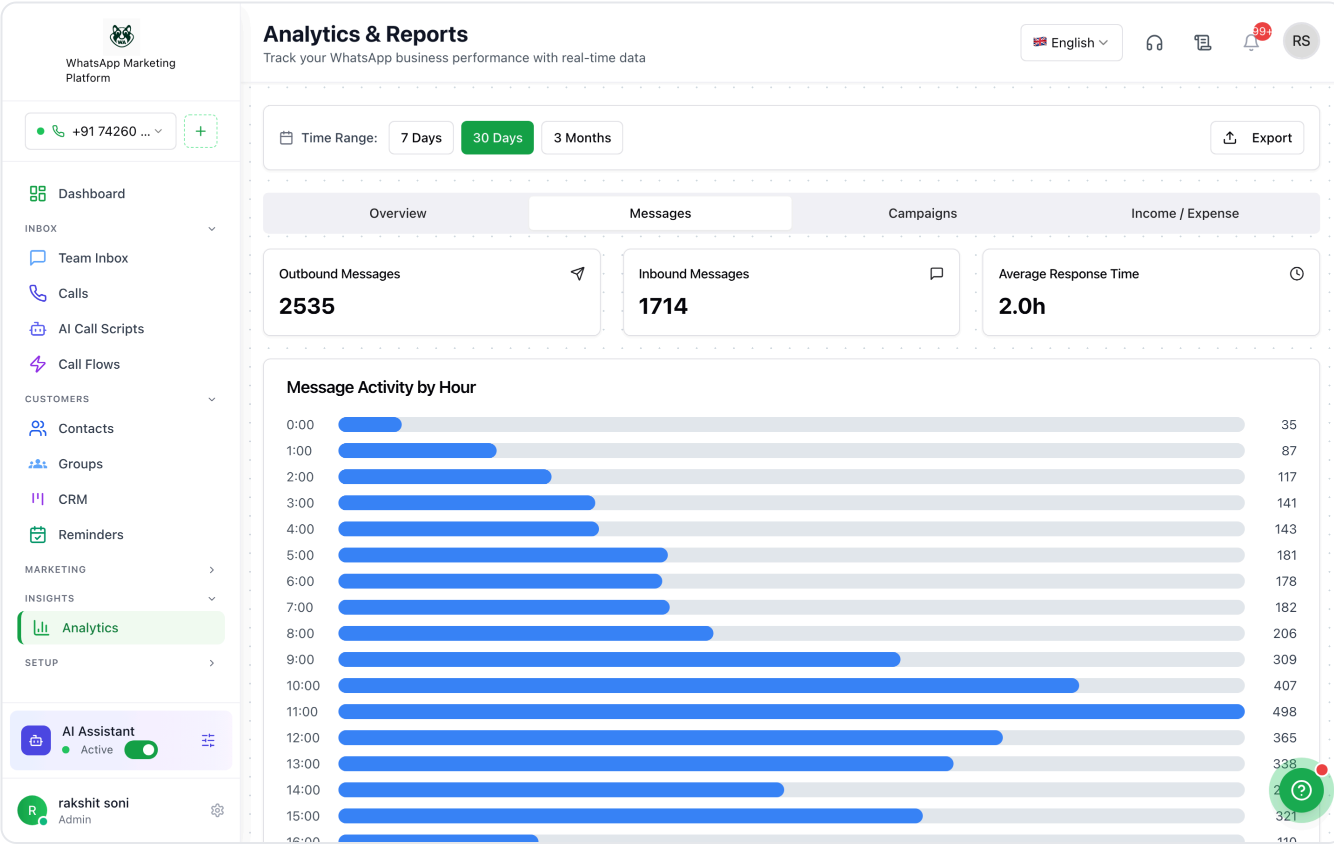
The Daily Performance chart, Message Status Distribution, and Error Analysis grouped by error code

1. **Drill into the Recipient Delivery table.** Every recipient is listed with their status and sent/delivered/read timestamps. Filter by **All / Delivered / Read / Sent / Failed**, click a row to jump to that contact's inbox conversation, or click an error code to filter to that error. Use **Resend to subset** at the top to re-send to failed (or any status) recipients as a new campaign.



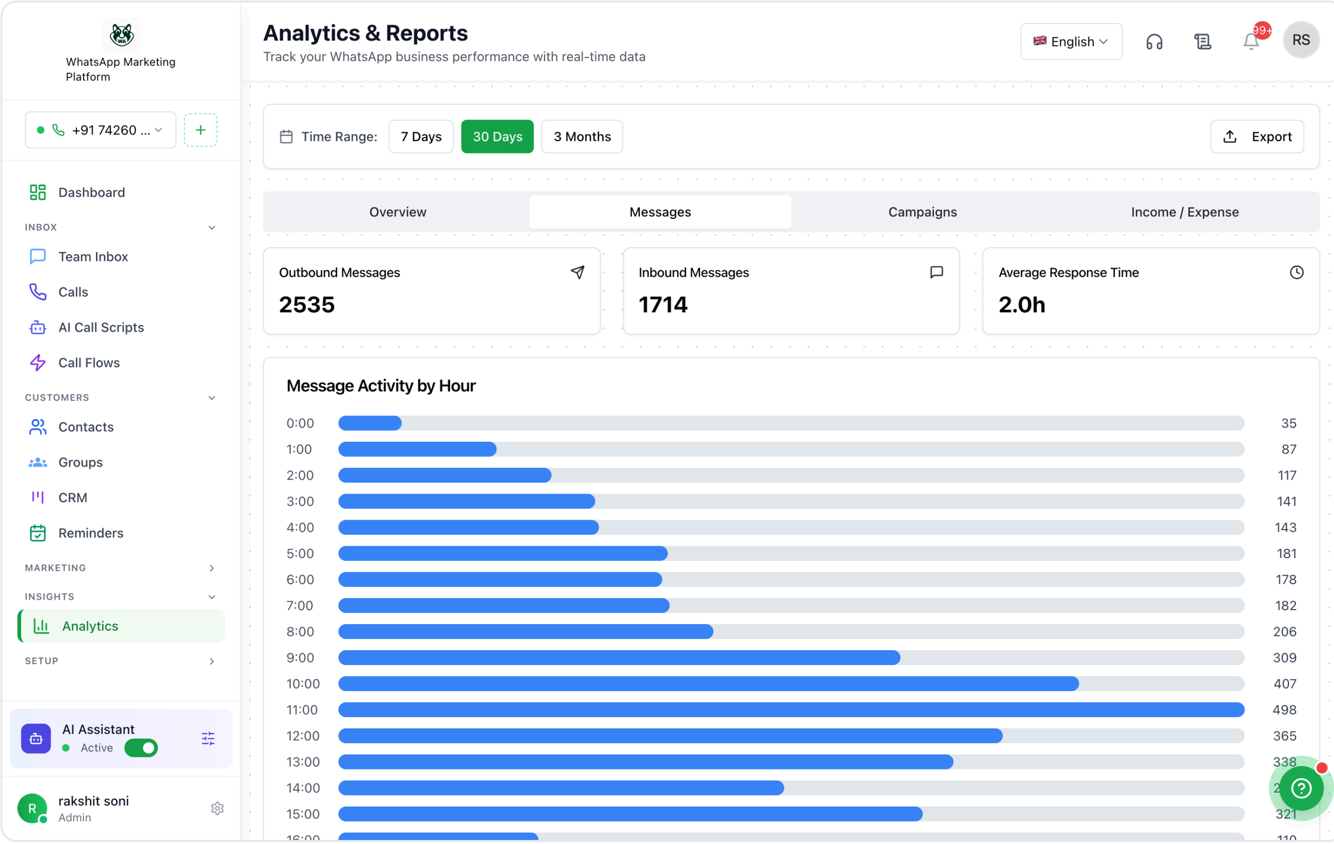
The Recipient Delivery table — status filters, per-recipient timestamps and the Resend to subset button

1. **Debug specific messages in Message Logs.** Go to **Settings → Message Logs** for a per-message record of your active channel. Use the **Search** box for a phone number or content, and filter by **Status** (Sent, Delivered, Read, Failed, Pending) and **Date range** (Last 24 hours, 7 days, 30 days, All time).



The Message Logs table — Status and Date-range filters, search box, and per-row status and error columns

1. **Read a failed message's error.** For any **Failed** row, the **Error** column shows Meta's error code and a short reason telling you what to fix. The list auto-refreshes about every 30 seconds; use the **Refresh** button to update immediately.



A Failed Message Logs row with the Meta error code and reason in the Error column

Tips

- Understand the status ladder: **Pending → Sent → Delivered → Read**, with **Failed** as a dead end. It only moves forward, so "Read" is always a subset of "Delivered".
- **Reached Meta** = sent + delivered + read + failed — everything that left the platform. Delivery, Read and Failure rates are calculated from these live counts, so the cards always reconcile with the status distribution.
- A high **Failure Rate** with one repeated error code usually means a single cause (invalid numbers, an unmapped template variable) — check **Error Analysis** and the per-recipient errors.
- If a campaign shows low delivery in Analytics, open **Message Logs** filtered to **Failed** to see the exact per-recipient reason.

FAQ

Q: Why is Read lower than Delivered?

A: Read only counts when the recipient actually opens the message, so it's normally a subset of Delivered. Some recipients also have read receipts turned off.

Q: Delivered says 0 but the messages went out — what's wrong?

A: They may still be **Sent** ("in flight") — Meta hasn't confirmed delivery yet. Counts climb automatically as Meta sends delivery and read webhooks, so give it a moment.

Q: A message is stuck on "Sent" — is it delivered?

A: "Sent" means it left the platform and was accepted by WhatsApp. It moves to "Delivered" once it reaches the phone and "Read" once opened. If it never advances, the number may be unreachable or has blocked you.

WhatsApp Forms (Flows)

WhatsApp Forms let you collect information inside the chat with a native, tap-to-open form — no website needed. You build a form once, then send it from an automation, a campaign, or the inbox; answers come back into the Team Inbox and can auto-fill your contacts and CRM. Forms live under **Forms** in the left sidebar (Customers section).

How to use (step by step)

1. **Open Forms and start a new form.** Click **Forms** in the left sidebar, then the blue **Create form** button at the top-right. To begin from a ready-made layout instead, use **Live appointment form** (covered below) or pick a template inside the builder.

📷

`admin-native-forms-01.png`

The Forms page — form cards with status, plus the Create form and Live appointment form buttons

The Forms page — form cards with status, plus the Create form and Live appointment form buttons

1. **Pick a starting template.** In the builder that opens, the left panel shows **Start from template** — one-click layouts like **Lead capture**, **Appointment booking**, **Contact us**, **Survey**, **Sign up**, or **Blank form**. Click one to pre-fill the screens, or start blank and add your own.

📷

`admin-native-forms-02.png`

The builder's Start from template list on the left panel

The builder's Start from template list on the left panel

1. **Set the name, channel and category.** In the top bar, type a **Form name**, choose the **Channel** to publish on, and pick a **Category** (for example **Lead generation** or **Appointment booking**). The category tells WhatsApp what the form is for.

📷

`admin-native-forms-03.png`

The builder top bar — form name, channel and category dropdowns

The builder top bar — form name, channel and category dropdowns

1. **Add fields and content to a screen.** From the **Add to screen** palette on the left, click any component to drop it in: headings and paragraphs, an image, text inputs (including **Phone**, **Email**, **Number**, **Password**), long text, **Date** and **Calendar**, **Dropdown**, single- and multi-choice, chips, an **Opt-in consent** box, or a link. Each component you add appears in the middle canvas.

📷

`admin-native-forms-04.png`

The Add to screen palette with grouped components

The Add to screen palette with grouped components

1. **Edit a component on the right.** Click a component in the canvas to select it; the right panel shows its settings — label, input type, options (one per line), helper text, and a **Required** switch. The green **Preview** below shows exactly how the screen looks in WhatsApp as you type.

📷

`admin-native-forms-05.png`

A component's settings on the right with the live WhatsApp phone preview

A component's settings on the right with the live WhatsApp phone preview

1. **Map answers to your contacts and CRM (optional).** For any input, use **Save answer to** in its settings to send the answer straight to a **contact field** (Name, Email, Company…), a **custom field**, or a **CRM stage**. On submit, the answer auto-fills the contact or moves them into that stage.

`admin-native-forms-06.png`

The Save answer to mapping dropdown with contact and CRM options

The Save answer to mapping dropdown with contact and CRM options

1. **Add more screens for a wizard (optional).** Click the **+** next to **Screens** to add a second screen, and toggle **Final** on the last one. Answers from earlier screens carry forward, so a multi-screen form still returns every answer together on submit. When ready, click **Create & publish** at the top-right.

`admin-native-forms-07.png`

The Screens column with multiple screens and the Final toggle

The Screens column with multiple screens and the Final toggle

1. **Send the form from an automation.** Open **Automations**, edit a flow, and drag in the **Send Form** node (Messages group). Pick your published form, write the message shown above the button, and set the button label. The automation pauses until the contact submits, then continues — the answer tags (like `{{full_name}}`) are listed right there to copy into later steps.

`admin-native-forms-08.png`

The Send Form node — form picker, message, button label and the copyable answer tags

The Send Form node — form picker, message, button label and the copyable answer tags

1. **Send it in a campaign or from the inbox.** On a published form card, click **Use in campaign** to create a WhatsApp template with a form button (usable in **Campaigns** after WhatsApp approves it). To send during a live chat, open the conversation and

click the **form icon** in the inbox header, then pick the form. Submissions appear as a green **Form submitted** card in the chat.

`admin-native-forms-09.png`

A form card's Use in campaign action and the Send form icon in the inbox header

A form card's Use in campaign action and the Send form icon in the inbox header

1. **Review responses.** Back on the Forms page, click **Responses** on any form to see every submission in a table — when it came, where from, and each answer in its own column. You can also start an automation automatically on any submission using the **Form submitted** trigger in the automation builder.

`admin-native-forms-10.png`

The Responses dialog — a table of submissions with answer columns

The Responses dialog — a table of submissions with answer columns

Tips

- **Only published forms can be sent.** After you click Create & publish, wait for the green **Published** badge; a red status means WhatsApp rejected the form — hover it to read why, fix, and save again.
- **Editing is safe.** Use the pencil on a form card to change fields any time; saving re-publishes on the same form, so automations that already use it keep working.
- **Use the copyable answer tags.** In the Send Form node, tap a green tag to copy it (like `{{email}}`), then paste it into a later **Send Message** step — no need to remember variable names.
- **Live appointment forms** (advanced) let customers book a real time slot inside WhatsApp — see the note in the API & Plugins module.

FAQ

Q: Can I use a form to send messages to people outside a 24-hour window?

A: Yes — click **Use in campaign** on the form to create an approved marketing template with a form button; once WhatsApp approves it, send it from Campaigns like any template.

Q: Where do the answers go?

A: Every submission is shown in the chat, saved in the form's **Responses** report, and — if you set **Save answer to** on a field — written to the contact or CRM stage automatically.