360SMS WhatsApp™ Integration

360 SMS offers seamless **WhatsApp** integration commonly used for "texting" customers in countries where their texting costs are quite high and/or MMS is not available such as in Asia, Africa, South America and even many parts of Europe. Also, most local country phone networks do not allow Country-to-Country texting so WhatsApp™ is the only choice for people texting friends and customers across multiple countries.

The 360 SMS support staff takes care of applying for a WhatsApp business account for you and then issues a WhatsApp enabled number to your Org. Then it is just another number and channel to send a "text".

If desired, one can easily customize Salesforce with preferences fields so that the customer always receives messages via WhatsApp instead of via traditional SMS. In the Bolder CRM org we use a `Contact.Last_SMS_Channel` field and a process builder on the SMS_History table maintains this field. All of our automations use the Contact.Sticky_Sender__c for the Sender Number and Contact.Last_SMS_Channel__c to ensure that we're using the correct number and channel.
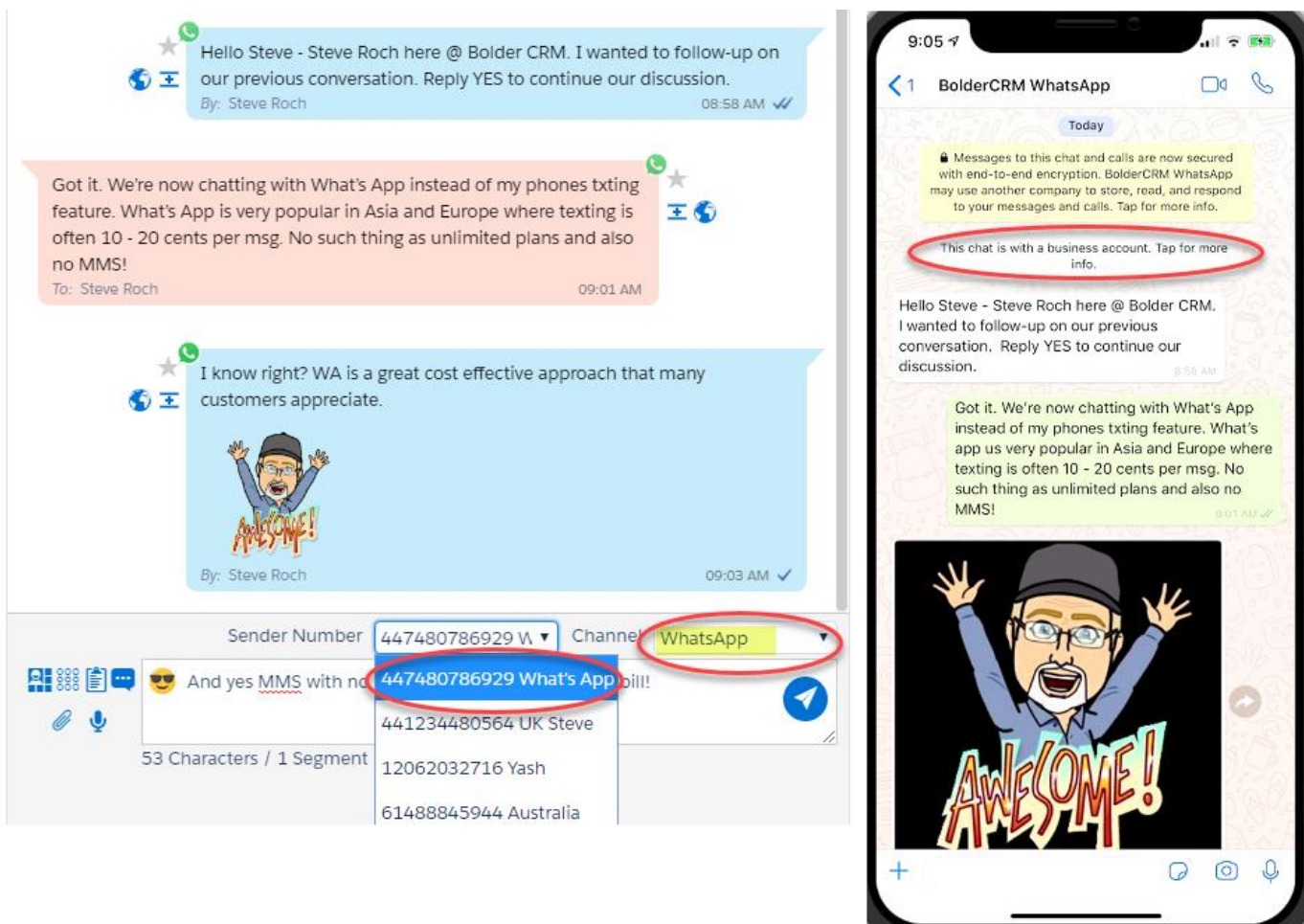

Figure 1 - WhatsApp "texting" is accomplished by choosing a WA enabled number and the channel

Pre-Approved Templates Only

WhatsApp has only published their API to 3rd party vendors in the past year after the acquisition by Facebook. In doing so they have put an **important restriction** on all 3rd party integration vendors like 360 SMS. The main restriction is that to initiate a conversation with a WhatsApp customer from Salesforce you as the business user must use a Pre-Approved Template that goes through a pre-approval process from the WhatsApp company themselves. The 360 SMS staff submits your requested Template for you. The purpose of the pre-approved templates is that the WhatsApp company is very protective of not allowing Marketing and Spam type messages. See the dedicated section further below on the **recommendations** and **template approval process**.

To be clear, the template restriction is only to <u>initiate</u> the first message in what they call a 24-Hour Session. Once, the customer replies to your template the session timer begins and you can say absolutely anything you want, send links, send pictures and other documents. Furthermore, if the customer themselves initiates a session by writing to you first (which comes into your Salesforce org) then this also starts a session and obviously no template is needed to reply.

As a result of this restriction the 360SMS platform prevents fre-form typing to a WA customer when <u>initiating</u> a new conversation outside of the 24-hour session window. Triggered WA messages are fully supported but even with triggered messages, the WA platform detects whether the initial message is a pre-approved template and will not deliver unauthorized messages per their anti-spam rules.
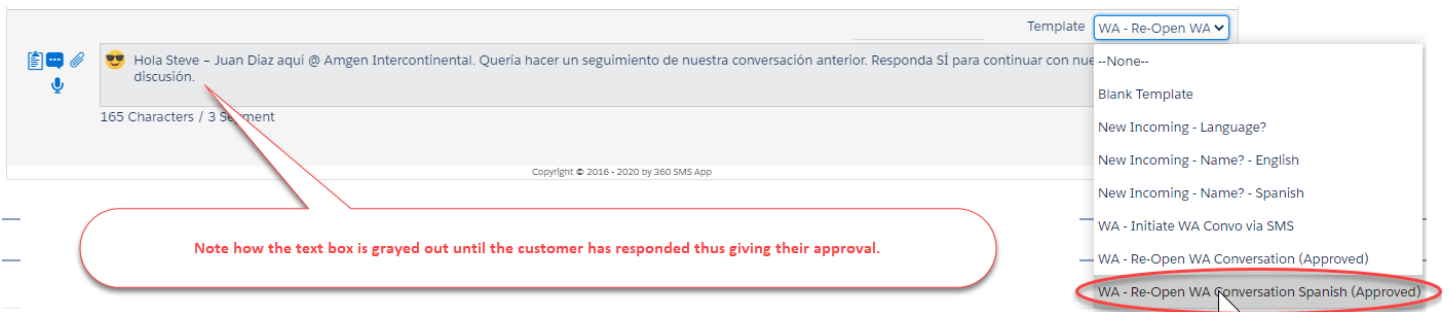

Figure 2 – Per the "Terms of Usage" the 360SMS platform prevents fre-form typing to a WA customer requiring one to choose only pre-approved templates. After the session is established though the text box is no longer greyed out.

Multiple Methods of Reaching WhatsApp Customers

Given the restrictions imposed by the WhatsApp company there are two methods to consider when initiating a conversation regardless of whether it is single conversational texting, batch texting or triggered texting.

Method #1 - WhatsApp Channel

Initiate a WhatsApp conversation using a WhatsApp number to the customers WA number. Per the strict rules of using the WA platform (imposed by WhatsApp NOT 360SMS), you must have your templates pre-approved. Templates fully support all merge tags from Salesforce and as noted below when you submit your template for approval you will do so with the merge tags in place.

Once the customer replies (thereby giving their approval), you can say anything you want and send pictures, documents and hyperlinks all within a 24-hour session. The session time and fees begin at the time of the customers reply. In the example below, this is 8:15am rather than when the outbound message was sent at 8:09am.
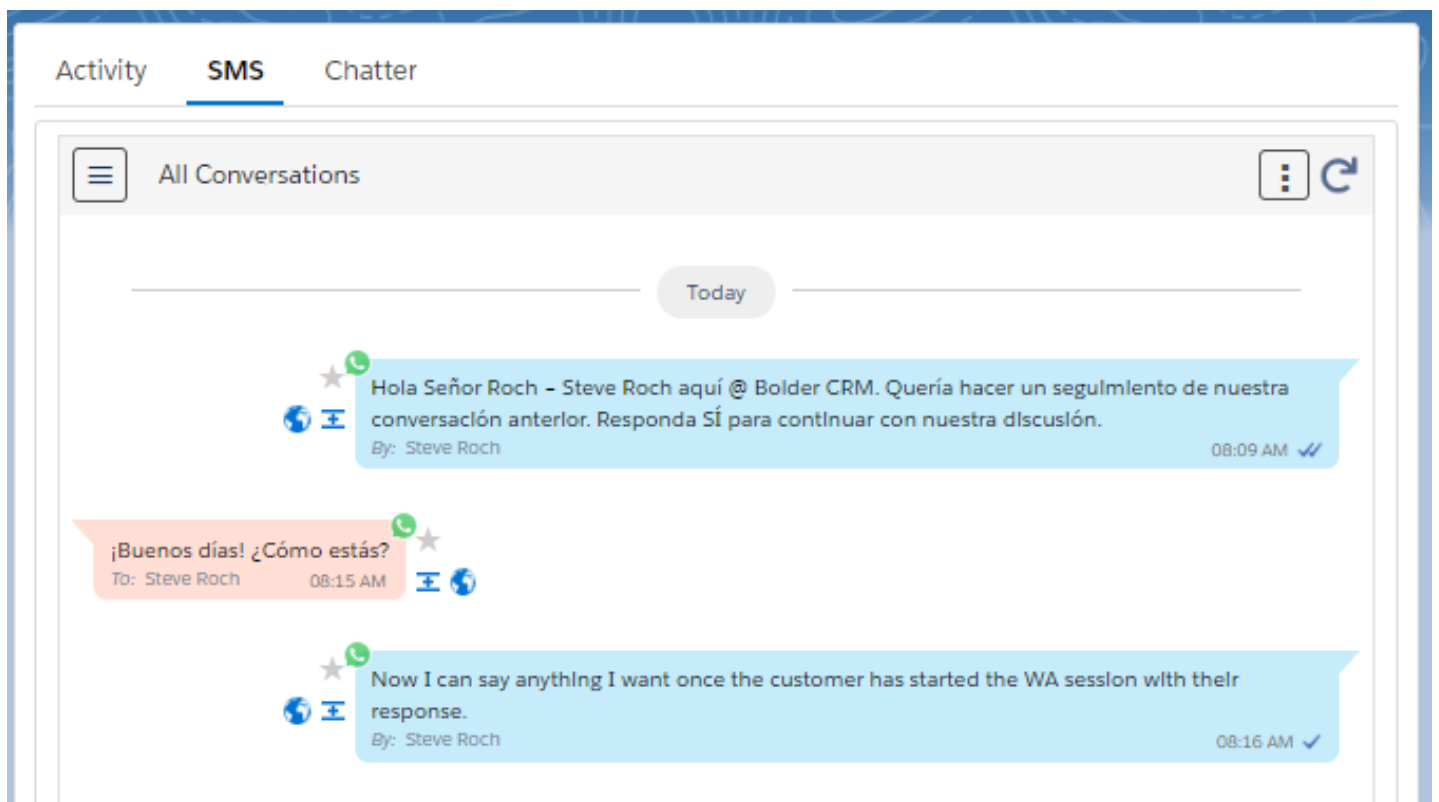

Figure 3 - A WhatsApp initiated conversation using a pre-approved template. Then the customer replies to start the 24-hr session and your next outbound is now unrestricted.

Method #2 - SMS Channel (ask customer to reply via WhatsApp)

Luckily, there is an easy workaround to the pre-approved template limitation. Simply initiate the conversation or send your Batch or Triggered message via the **SMS** channel using a traditional SMS Sender Number but use the technique of providing a specially formatted hyperlink provided by the WhatsApp platform. Since most customers only pay for their Outbound SMS, they will not mind receiving an SMS so long as they can reply via WhatsApp. This special hyperlink shown in **Figure 4** allows the customer to reply by clicking the link which will launch WhatsApp on their phone.
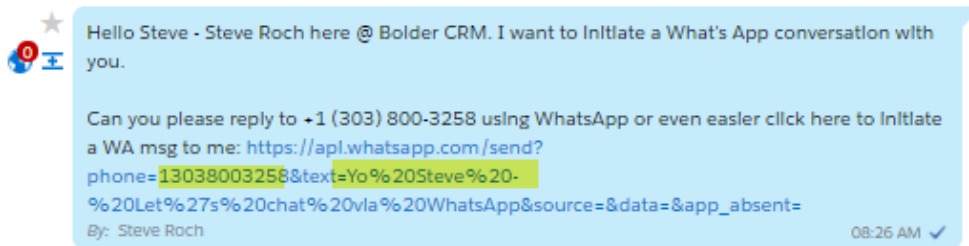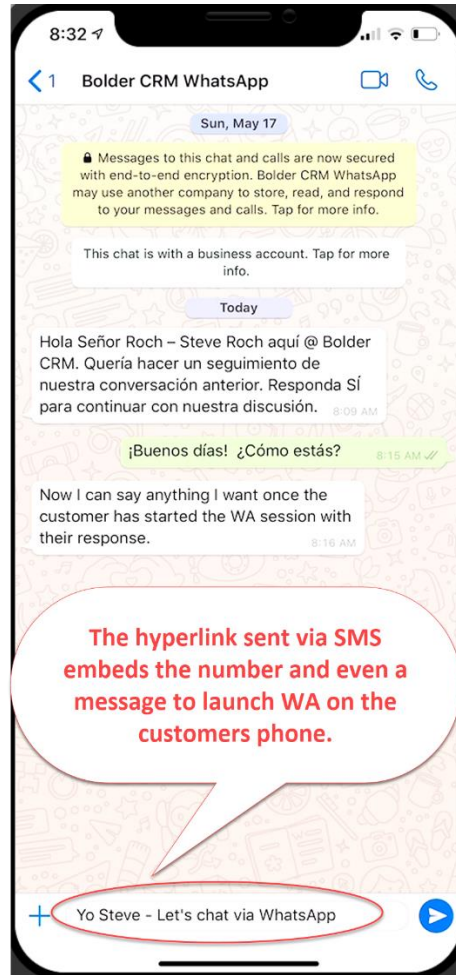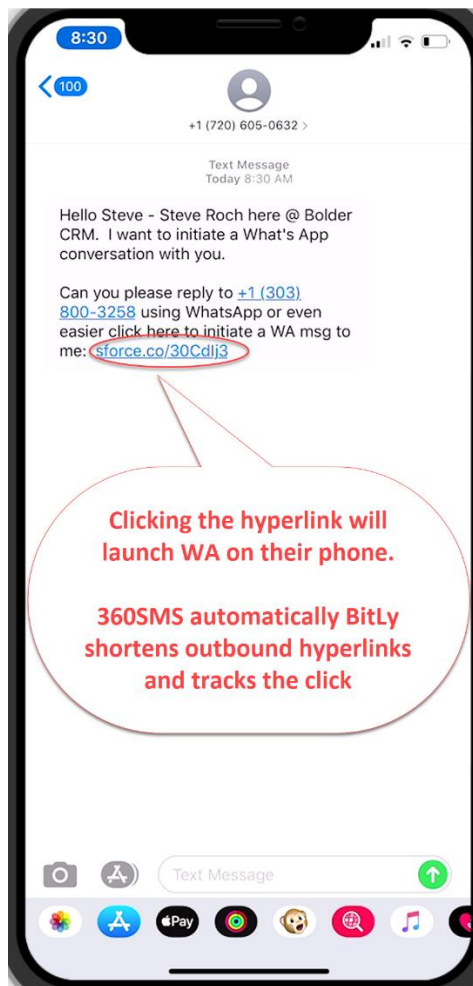

Hello Steve - Steve Roch here @ Bolder CRM. I want to initiate a What's App conversation with you.

Can you please reply to +1 (303) 800-3258 using WhatsApp or even easier click here to initiate a WA msg to me: https://api.whatsapp.com/send?phone=13038003258&text=Yo%20Steve%20-%20Let%27s%20chat%20via%20WhatsApp&source=&data=&app_absent=

By: Steve Roch   08:26 AM ✓

Figure 4 - Send an __SMS__ which has no restriction. Call-To-Action to reply via WhatsApp or to click the special WA hyperlink that launches their WhatsApp app on their phone.

Clicking the hyperlink will launch WA on their phone.

360SMS automatically BitLy shortens outbound hyperlinks and tracks the click

The hyperlink sent via SMS embeds the number and even a message to launch WA on the customers phone.

For your convenience here is the copy/pastable message to use as an SMS channel template allowing the customer to click the link and open their WhatsApp app on their phone ready to reply. The URL has two variables Phone and Text and like all URL variables you separate them with the & symbol. The suggested "Text" variable can either be left off or as shown below you can construct a sentence, noting that spaces use the %20 URL encryption.

Hello {!Contact.firstname} - {!$User.name} here @ {!$Organization.name}. I want to initiate a What's App conversation with you.

Can you please reply to +1 (303) 800-3258 using WhatsApp or even easier click here to initiate a WA msg to me: https://api.whatsapp.com/send?phone=13038003258&text=Yo%20Steve%20-%20Let%27s%20chat%20via%20WhatsApp&source=&data=&app_absent=

Salesforce Formula for the WhatsApp Link

Consider creating a Contact-based formula field for an even easier use of a Merge Tag in your SMS Templates. The formula below creates the appropriate WhatsApp Link and merges in a sample message plus the customers name simulating a signature. Now it can easily be used in emails and SMS with a convenient link for the customer to initiate a WhatsApp conversation with you.

For your convenience, copy, paste and modify the formula as you see fit.

```
"https://api.whatsapp.com/send?phone=13038003258&text=Hello%20Steve%20-
%20Let%27s%20chat%20via%20WhatsApp.%20~%20" &

 FirstName  & "%20" &  LastName & "%20|%20" &
SUBSTITUTE(Account_Name_Formula__c  , " ", "%20") & "&source=&data=&app_absent="
```

WhatsApp Pre-Approved Template Guidelines

Your WhatsApp message templates must fall into one of the following categories. Templates that do not align clearly with these template types are more likely to be rejected by WhatsApp in the template approval process described below. Note however that we at 360SMS have quite successfully helped get other kinds of templates approved such as re-initiating a conversation with an existing customer. The key is knowing that WhatsApp will reject messages if they think you do not have a pre-existing relationship with the customer. See the sample templates section below:

Type	Comments
Account Update:	Let customers know about updates or changes to their accounts.
Alert Update:	Send important updates or news to customers.
Appointment Update:	Send confirmations, reminders, or other updates to customers about their appointments.
Auto-Reply:	Send auto-replies to customers when your business isn't online or available to respond right away.
Issue Resolution:	Respond to questions, concerns, or feedback from customers about your business.
Payment Update:	Send a message to customers about their payment.
Personal Finance Update:	Send a message to customers about their personal finances.
Reservation Update:	Send confirmations, reminders, or other updates to customers about their reservations.
Shipping Update:	Send shipping updates to customers about their orders.
Ticket Update:	Send ticketing information or updates to customers.
Transportation Update:	Send transportation information or updates to customers.

Message Template Approval Criteria

WhatsApp supports up to 250 templates per account. We recommend starting with a handful to get started faster.

First, please note that the following is not allowed in the WhatsApp's Business API:

- **Marketing or promotional content:** This includes any offers, coupons, free gifts, upselling, cold call messages and/or surveys to collect data. Certain words that may make the template sound promotional may also cause it to be rejected.

- **Subscription messages:** Subscription content, including newsletters or blog post alerts, are not allowed on WhatsApp.

Your template text should make it clear to the user why they received your message. You can remind them of the reason why they originally granted you permission to send the messages. For example:
"*Hi {{1}}, thanks for your order no.: {{2}} placed on {{3}}. Your order has shipped. You can get a tracking update any time by replying TRACK.*"

Here are some guidelines for increasing the odds of getting your templates approved:

- Placeholders must have double curly braces, such as {{1}}; single curly braces will not work. After approval you will paste this into your SMS Templates and replace with the proper merge tags, e.g. {!Contact.firstname}

- Templates must have a specific, self-evident purpose. For example: "{{1}} {{2}}" would be rejected because it could be abused to spam users. You need to surround the parameters with information so it is clear what type of information will be inserted.

- Templates should be concise and convey only the necessary information that aligns with the template category. We suggest getting feedback from others to ensure that the template text is clear.

- Templates must not have any grammatical or spelling mistakes. Templates that include even minor spelling or grammatical mistakes are likely to be rejected by WhatsApp.

- Templates should be tagged with the appropriate category and language.

- If you need to write a template to re-open the 24-hour window, we suggest starting with some mention of a previous thread or your pre-existing relationship with the customer. This is as much for the benefit of the WhatsApp approval process as it is for the destination customers. Examples:

  o I'm sorry that I wasn't able to respond to your concerns yesterday but I'm happy to assist you now. If you'd like to continue this discussion, please reply with YES.

  o Hello {!Contact.firstname} - {!$User.name} here @ {!$Organization.name}. I wanted to follow-up on our previous conversation. Reply YES to continue our discussion.

  o Hola {!Contact.salutation} {!Contact.lastname} – {!$User.name} aquí @ {!$Organization.name}. Quería hacer un seguimiento de nuestra conversación anterior. Responda SÍ para continuar con nuestra discusión.

Example Templates

Below are some messages that have been successfully approved

I'm sorry that I wasn't able to respond to your concerns yesterday but I'm happy to assist you now. If you'd like to continue this discussion, please reply with YES.
Hello {!Contact.firstname} - {!$User.name} here @ {!$Organization.name}. I wanted to follow-up on our previous conversation. Reply YES to continue our discussion.
Hola {!Contact.salutation} {!Contact.lastname} – {!$User.name} aquí @ {!$Organization.name}. Quería hacer un seguimiento de nuestra conversación anterior. Responda SÍ para continuar con nuestra discusión.
Hi {!scheduled_appointment__c.attendee_first_name__c} - {!scheduled_appointment__c.assigned_to__r.firstname} here @ {!$Organization.name}. Confirming our mtg set for: {!scheduled_appointment__c.appointment_dayofweek__c}, {!scheduled_appointment__c.appointment_date_time_customer__c} {!scheduled_appointment__c.time_zone_lookup__r.name} My calendar syncs to Salesforce via Revenue Inbox triggering this SMS. Ask me about it on our call.
Hello {!scheduled_appointment__c.attendee_first_name__c} - Triggered reminder of our mtg in 10 min. Reply CONFIRM or RESCHEDULE Many businesses want reminders w/ a pic of the service tech. Here's a pic of {!scheduled_appointment__c.owner.firstname} via triggered Scheduled MMS.
Hello {!!Order_c.firstname} – Order No.: {!!Order_c.Order_Number__c} has been processed and shipped today. Use tracking code: {!Order_c.Order_Tracking_Number__c} or click this link to track your package: {!Order_c.Order_Tracking_Link__c}

About the Author

Steve Roch, CEO of Bolder CRM is an SMS Industry expert having worked or consulted with the top three SMS Apps on the Salesforce AppExchange and also having built the popular Salesforce app **ActionGrid**™, acquired by Conga in April-2016 and now renamed **Conga Grid**™. Bolder CRM is the exclusive distributor of 360 SMS in the United States, Canada and the United Kingdom.

Learn more about Steve and Bolder CRM at https://boldercrm.com/360SMS and https://www.linkedin.com/in/steveroch/

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