

WhatsApp SaaS CRM: Complete User Manual

This manual is designed to help you understand and use every feature of your WhatsApp CRM. It is divided into ten chapters, matching the ten options on your left-hand sidebar. Follow the step-by-step instructions to master your system.

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Chapter 1: Dashboard

The Dashboard is your control center. It gives you a real-time overview of your WhatsApp performance and customer engagement.

Understanding Your Stats

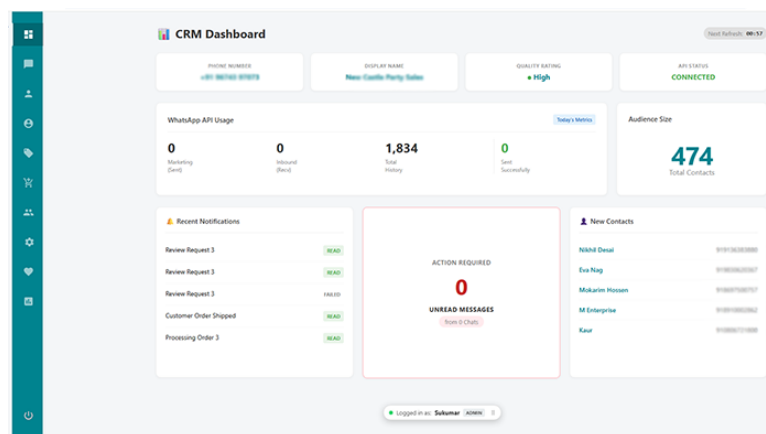
1. Look at the top row to verify your connected Phone Number, Display Name, Quality Rating, and API Status.
2. View the "WhatsApp API Usage" box to see how many messages you have sent and received today, alongside your total historical count.
3. Check the "Audience Size" box to see the total number of contacts stored in your system.

Monitoring Notifications

1. Look at the bottom left card to see "Recent Notifications" (templates that were recently sent).
2. Click the red "Action Required" card in the middle to jump directly to your Inbox and view unread messages.
3. View the "New Contacts" card on the right to see the latest people who have interacted with your business.

System Warnings & Timers

1. Look at the top right corner for the "Next Refresh" timer. The Dashboard automatically updates every 60 seconds.
2. Watch for an orange warning banner at the top of the screen. If your database is getting too full, the system will alert you here to clean it up.



Chapter 2: Inbox

The Inbox is where you chat with customers, send files, and manage conversations.

How to Read and Reply to Messages

1. Click a customer's name on the left sidebar to open their chat history.
2. Type your message in the white text box at the bottom of the screen.
3. Click the paper airplane icon (➤) to send the message.

How to Use Chat Tools

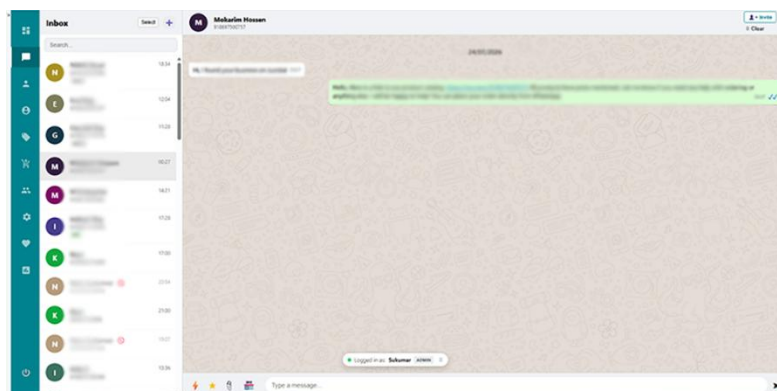
1. Click the ⚡ (Lightning Bolt) icon to send a pre-approved Meta Template (like an order confirmation or review request).
2. Click the ★ (Star) icon to select and send a saved "Quick Reply".
3. Click the 📎 (Paperclip) icon to attach an image, video, or document from your computer.
4. Click the 🛒 (Store) icon to search for a product and send a product card directly in the chat.

How to Manage the Customer

1. Right-click on any customer in the left sidebar to open the hidden menu.
2. Click "Block" to prevent them from messaging you, or "Unblock" to reverse it.
3. Click any of the predefined Tags (like VIP or Lead) to categorize the customer, or click "New Tag..." to create a custom one.
4. Click the ✎ (Pencil) icon that appears when you hover over a contact's name in the sidebar to rename them.
5. Click the "👤 + Invite" button at the top right of the chat window to invite a team member to assist with the conversation.

How to Delete Chats

1. Open a chat and click the "🗑 Clear" button at the top right to delete a single conversation.
2. Click the "Select" button at the top of the left sidebar to enter Bulk Mode.
3. Check the boxes next to multiple chats and click "Delete" to erase them all at once.



Chapter 3: Contacts

The Contacts module holds your entire customer database.

How to Search and Filter

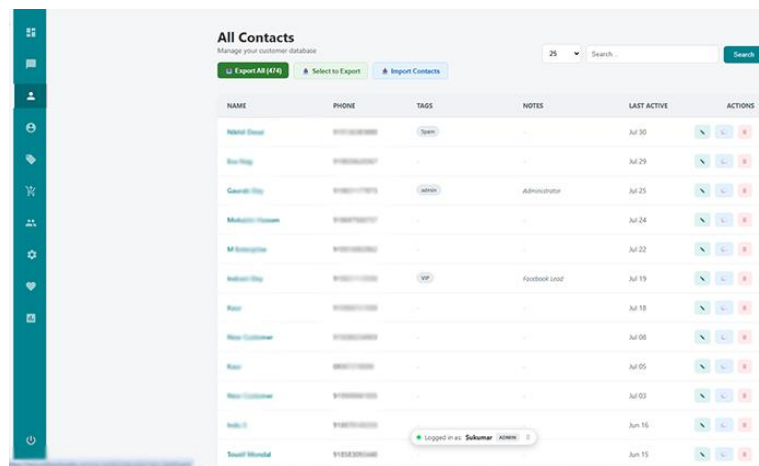
1. Type a name, phone number, or tag into the search bar at the top right.
2. Click the "Search" button to filter the list.
3. Use the dropdown menu next to the search bar to change how many contacts are displayed per page (25, 50, 75, 100, or 150).

How to Edit or Delete a Contact

1. Locate the customer in the table and look at the "Actions" column on the far right.
2. Click the  (Pencil) icon to edit their Name, Tags, or Internal Notes.
3. Click the  (Speech Bubble) icon to immediately open their chat in the Inbox.
4. Click the  (Trash) icon to permanently delete the contact and their entire message history.

How to Export and Import Data

1. Click the "  Export Contacts" button at the top to download your entire database as a CSV file for Excel.
2. Click the "  Import Contacts" button to upload a new list of customers.
3. Ensure your upload file is a .csv and exactly matches the required header format: Name, Phone Number, Tags, Notes.



The screenshot displays the 'All Contacts' management interface. It features a sidebar on the left with navigation icons. The main area has a title 'All Contacts' and a subtitle 'Manage your customer database'. Below this are buttons for 'Export All (414)', 'Select to Export', and 'Import Contacts'. A search bar and a dropdown menu for '25' items are also present. The table below lists contacts with columns: NAME, PHONE, TAGS, NOTES, LAST ACTIVE, and ACTIONS. The 'ACTIONS' column contains icons for edit, chat, and delete.

NAME	PHONE	TAGS	NOTES	LAST ACTIVE	ACTIONS
Natalie Davis	913-123-4567	Open	-	Jul 30	  
Ben Hays	913-234-5678	-	-	Jul 29	  
Garrett Day	913-345-6789	Admin	Administrator	Jul 25	  
Melanie Johnson	913-456-7890	-	-	Jul 24	  
Mr. Rodriguez	913-567-8901	-	-	Jul 22	  
Andrew Day	913-678-9012	Top	Football Coach	Jul 19	  
Ryan	913-789-0123	-	-	Jul 18	  
New Customer	913-890-1234	-	-	Jul 08	  
Ryan	913-901-2345	-	-	Jul 05	  
New Customer	913-012-3456	-	-	Jul 03	  
John D.	913-111-2222	-	-	Jun 15	  
Tyrell Whitted	913-333-4444	-	-	Jun 15	  

Logged in as: **Skumar Admin**

Chapter 4: Cart Recovery

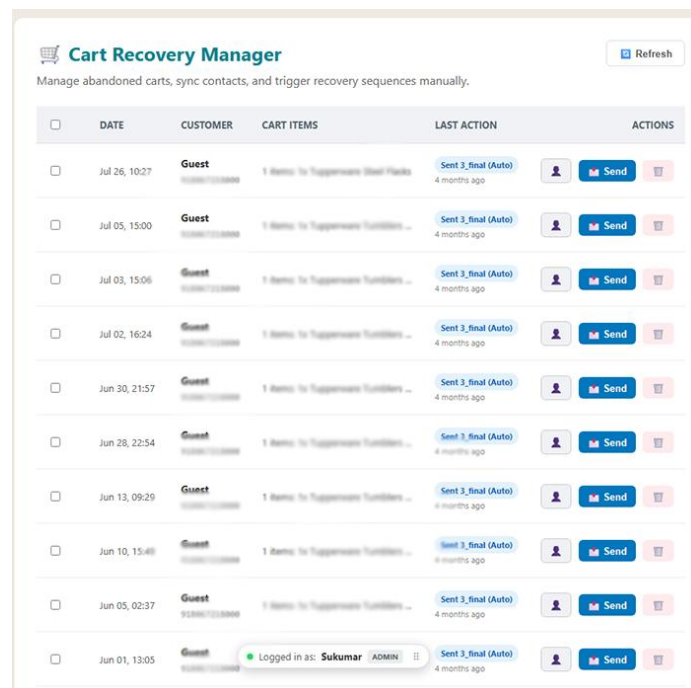
This module tracks customers who added items to their shopping cart but did not complete the purchase.

How to Manage a Single Cart

1. Review the table to see the Date, Customer Name, and the items left in their cart.
2. Click the  (Person) icon in the Actions column to save this customer to your main Contacts database.
3. Click the " Send" button to manually trigger a recovery message.
4. Select which template to send (Friendly reminder, Social proof, or Final chance) and click "Send Now".
5. Click the  (Trash) icon to delete the cart if the customer has already purchased or is not interested.

How to Use Bulk Actions

1. Click the checkbox at the very top of the table to select all pending carts.
2. Look at the black "Bulk Action" bar that appears at the bottom of the screen.
3. Click " Save All" to add everyone to your contacts.
4. Click " Send All" to blast a recovery template to every selected customer.
5. Click " Delete All" to clear out the selected carts.



Cart Recovery Manager
Manage abandoned carts, sync contacts, and trigger recovery sequences manually.

☐	DATE	CUSTOMER	CART ITEMS	LAST ACTION	ACTIONS
☐	Jul 26, 10:27	Guest 928867722@9999	1 item: for Tupperware Steel Plates	Sent 3_final (Auto) 4 months ago	  Send 
☐	Jul 05, 15:00	Guest 928867722@9999	1 item: for Tupperware Tumblers	Sent 3_final (Auto) 4 months ago	  Send 
☐	Jul 03, 15:06	Guest 928867722@9999	1 item: for Tupperware Tumblers	Sent 3_final (Auto) 4 months ago	  Send 
☐	Jul 02, 16:24	Guest 928867722@9999	1 item: for Tupperware Tumblers	Sent 3_final (Auto) 4 months ago	  Send 
☐	Jun 30, 21:57	Guest 928867722@9999	1 item: for Tupperware Tumblers	Sent 3_final (Auto) 4 months ago	  Send 
☐	Jun 28, 22:54	Guest 928867722@9999	1 item: for Tupperware Tumblers	Sent 3_final (Auto) 4 months ago	  Send 
☐	Jun 13, 09:29	Guest 928867722@9999	1 item: for Tupperware Tumblers	Sent 3_final (Auto) 4 months ago	  Send 
☐	Jun 10, 15:49	Guest 928867722@9999	1 item: for Tupperware Tumblers	Sent 3_final (Auto) 4 months ago	  Send 
☐	Jun 05, 02:37	Guest 928867722@9999	1 item: for Tupperware Tumblers	Sent 3_final (Auto) 4 months ago	  Send 
☐	Jun 01, 13:05	Guest 928867722@9999	Logged in as: Sukumar ADMIN	Sent 3_final (Auto) 4 months ago	  Send 

Chapter 5: Marketing

The Marketing module allows you to send bulk promotional messages to selected groups of customers.

How to Create and Send a Campaign

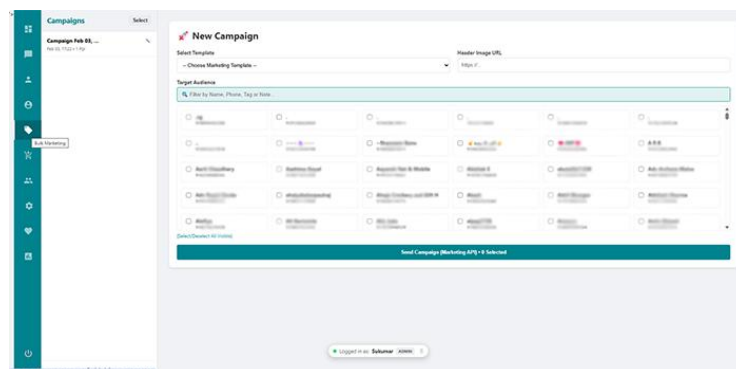
1. Navigate to the right side of the screen under "🚀 New Campaign".
2. Click the "Select Template" dropdown and choose an approved Meta marketing template.
3. Paste a direct link into the "Header Image URL" box to attach an image to your blast.
4. Use the "Target Audience" search bar to filter your contacts (e.g., type "VIP" to only show VIP tags).
5. Click the "[Select/Deselect All Visible]" link to select your filtered audience, or manually check the boxes next to individual names.
6. Click the large green "Send Campaign" button at the bottom to dispatch the messages.

How to View Campaign Reports

1. Look at the left sidebar to see a list of your past campaigns.
2. Click on any campaign name to load its performance report on the right side of the screen.
3. Review the colorful boxes to see how many messages are Pending, Delivered/Read, or Failed.

How to Manage Past Campaigns

1. Hover over a campaign name in the left sidebar and click the ✎ (Pencil) icon to rename it for better organization.
2. Hover over a campaign name and click the ♻️ (Recycle) icon to load its exact template, image, and audience into the "New Campaign" screen to easily send it again.
3. Click the "Select" button at the top of the sidebar, check the boxes next to old campaigns, and click "Delete Selected" to remove them.



Chapter 6: Templates

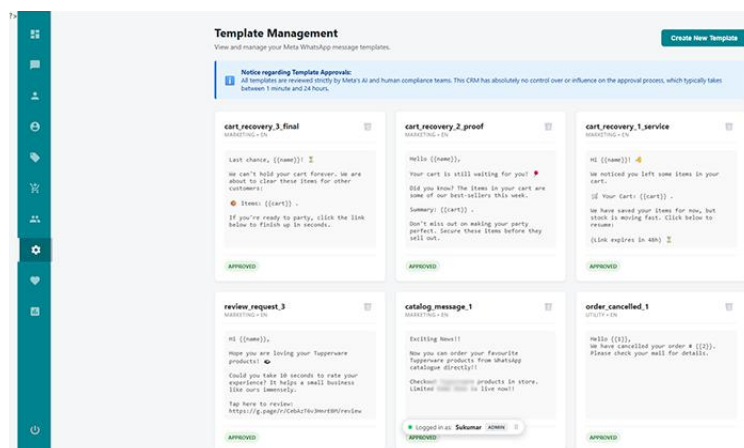
This module allows you to create highly structured messages that must be approved by Meta before you can send them in bulk.

How to View Template Status

1. Look at the main grid to see all your existing templates.
2. Check the colored badge at the bottom of each card. "APPROVED" (Green) means it is ready to use.
3. If a badge says "REJECTED" (Red), read the reason provided below it. You will need to create a new, corrected version.
4. Click the  (Trash) icon on any template card to permanently delete it from your Meta account.

How to Create a New Template

1. Click the green "Create New Template" button at the top right.
2. Type a name in the "Template Name" box. You must use only lowercase letters and underscores (e.g., summer_sale_promo).
3. Select a Category (Marketing or Utility) and your Language.
4. Type an optional short Header and Footer.
5. Type your main text in the "Message Body" box. Use {{1}} or {{2}} to create blank spaces where customer names or order numbers will be inserted later.
6. Click "Submit to Meta for Approval". Approvals usually take between 1 minute and 24 hours.



Chapter 7: Users

The Users module allows you to add staff members and control exactly what they are allowed to see and do.

How to Add a New Team Member

1. Click the "+ Add New" button at the top of the Team Directory on the left.
2. Fill out the "Full Name" and "Email Address" fields on the right side of the screen.
3. Select a Role (Team Member, Supervisor, or Administrator) from the dropdown. This will automatically check the appropriate permission boxes below.
4. Type a secure password in both password boxes.
5. Review the "Granular Permissions Grid" at the bottom and manually check or uncheck boxes to customize what this user can View, Add, Edit, or Delete.
6. Click "Save User & Permissions".

How to Edit or Delete a User

1. Find the user in the Team Directory list on the left.
2. Click the "⚙️ Edit" button to load their details into the form. You can change their role, update their permissions, or change their password.
3. Click the "🗑️" (Trash) button to permanently delete their account.

The screenshot displays the 'Users' module interface. On the left is a teal sidebar with navigation icons. The main area is split into two panels. The left panel, titled 'Team Directory', contains a table with columns: NAME, ROLE, STATUS, and ACTION. It lists two users: 'Subuser' (role: ADMIN, status: active) and 'Guest User' (role: guest, status: active). The right panel, titled 'Add New User', contains a form for creating a new user. It includes fields for 'FULL NAME' and 'EMAIL ADDRESS', a 'ROLE (TEMPLATE: PRESET)' dropdown, a 'STATUS' dropdown, and two password fields: 'PASSWORD' and 'CONFIRM PASSWORD'. Below these is a 'Granular Permissions Grid' table with columns: MODULE / PAGE, VIEW, ADD, EDIT, and DELETE. The grid lists various system modules and their corresponding permissions for the selected role. At the bottom right of the form is a 'Save User & Permissions' button. A 'Clear / Reset' button is located at the top right of the form.

NAME	ROLE	STATUS	ACTION
Subuser admin@newcastleparanotes.com	ADMIN	active	to edit
Guest User guest@newcastleparanotes.com	guest	active	to edit

MODULE / PAGE	VIEW	ADD	EDIT	DELETE
Dashboard	☒	☒	☒	☒
Index	☒	☒	☒	☒
Contacts	☒	☒	☒	☒
Profile	☒	☒	☒	☒
Settings	☒	☐	☐	☐
Templates	☐	☐	☐	☐
Health	☒	☐	☐	☐
Marketing	☐	☐	☐	☐
Cart Recovery	☐	☐	☐	☐
Users	☐	☐	☐	☐
Analytix	☒	☒	☒	☒

Chapter 8: Profile

This module holds the public-facing information that customers see when they view your WhatsApp profile, as well as mandatory compliance data.

How to Update Your WhatsApp Profile

1. Fill in your "About" status (e.g., "Available" or "Always open").
2. Type a clear Business Description that tells customers what you do.
3. Select the Business Category that best fits your company from the dropdown.
4. Enter your physical Address, Contact Email, and up to two Website URLs.

How to Complete India Compliance

1. Scroll down to the "India Compliance (Required)" section.
2. Type your official Legal Business Name and select your Business Type (e.g., Sole Proprietorship, Private Ltd Company).
3. Check the box if you are a "Registered Entity under Indian Tax/Companies Act".
4. Fill in the Customer Care Details (Email, Landline, Mobile).
5. Fill in the Grievance Officer details (Name, Email, Landline, Mobile).
6. Click the green "Save Changes" button at the top right to push this data directly to Meta.

The screenshot displays the 'Business Settings' interface for a WhatsApp Business profile. The left sidebar contains navigation icons for various settings. The main content area is divided into two columns. The left column, titled 'General Profile', includes fields for 'ABOUT STATUS', 'BUSINESS DESCRIPTION', 'BUSINESS CATEGORY' (set to 'Shopping & Retail'), 'ADDRESS', 'CONTACT EMAIL', and 'WEBSITE 1' and 'WEBSITE 2'. The right column, titled 'India Compliance (Required)', contains fields for 'LEGAL BUSINESS NAME', 'BUSINESS TYPE' (set to 'Sole Proprietorship'), a checkbox for 'REGISTERED ENTITY UNDER INDIAN TAX/COMPANIES ACT', 'Customer Care Details' (Email, Landline, Mobile), and 'Grievance Officer' details (Name, Email, Landline, Mobile). A green 'Save Changes' button is located at the top right of the right column. At the bottom center, a status bar indicates 'Logged in as: Subhakar JAIN'.

Chapter 9: Settings

This module controls the core engine of your CRM, including branding, Meta API connections, and automated chatbots.

How to Customize Branding and Theme

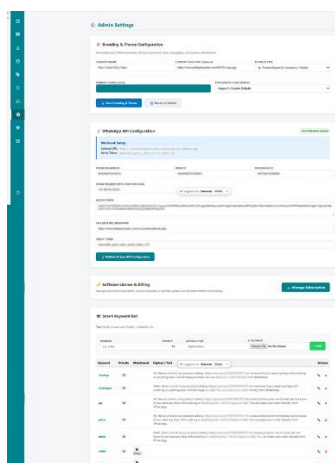
1. Type your Company Name and paste a URL to your Company Logo.
2. Select your Business Type (Product-Based or Service-Based). This changes how certain features behave in the CRM.
3. Click the "Primary Theme Color" box to choose your brand's color from a picker.
4. Select your preferred Typography (Font) from the dropdown list.
5. Click "Save Branding & Theme".

How to Configure the WhatsApp API

1. Paste your Meta credentials into the respective boxes: Phone Number ID, WABA ID, FB Business ID, Phone Number, and Access Token.
2. Click "Validate & Save API Configuration". The system will strictly verify these details with Meta before saving them.
3. Copy the "Callback URL" and "Verify Token" displayed in the blue box and paste them into your Meta Developer Dashboard to activate your webhook.

How to Build Smart Keyword Bots

1. Scroll down to the "Smart Keyword Bot" section.
2. Type a trigger word in the "Keyword" box.
3. Enter a "Priority" number (Priority 10 overrides Priority 1 if keywords conflict).
4. Type your automated response in the "Caption / Text" box.
5. Click "Choose File" under Attachment if you want the bot to reply with an image, video, or PDF.
6. Click "+ Add". You can view, edit (✎), or delete (✕) your rules in the table below.



Chapter 10: System Health

The Health module allows you to monitor the technical stability of your server, database, and background automations.

How to Check Infrastructure Status

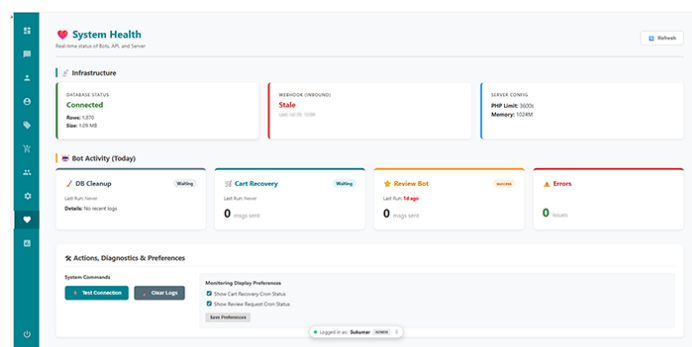
1. Look at the top three cards. Ensure the "Database Status" is Connected (Green) and the "Webhook (Inbound)" is Active (Green).
2. Monitor the "Rows" and "Size" of your database. If it exceeds 450,000 rows or 900 MB, the system will warn you to clean it up.

How to Monitor Bot Activity (Cron Jobs)

1. Look at the middle row of cards to verify that your background tasks are running.
2. Check the "DB Cleanup", "Cart Recovery", and "Review Bot" boxes. The text should say "Success" and show you exactly how many minutes ago the task ran.
3. Check the "Errors" card to see if any automated tasks failed today.

How to Run System Diagnostics

1. Scroll to the "Actions, Diagnostics & Preferences" section.
2. Click " ⚡ Test Connection" to force the CRM to ping Meta and verify that your API tokens are still active.
3. Check or uncheck the boxes under "Monitoring Display Preferences" to hide Cart Recovery or Review bots from this screen, then click "Save Preferences".
4. Review the "Execution Log" table at the very bottom to read the exact, line-by-line history of your automated scripts.
5. Click " 🗑 Clear Logs" if you want to permanently erase the Execution Log history to save space.



Chapter 11: Analytics

The Analytics module turns your CRM from a simple communication tool into a powerful Business Intelligence dashboard. It allows you to track message delivery rates, read receipts, and customer engagement patterns to optimize your communication strategy.

How to Filter Your Data

1. Look at the top right corner of the dashboard to find the Date Filter dropdown.
2. Select **Last 7 Days**, **Last 30 Days**, or **Last 90 Days**. The entire page will instantly recalculate the metrics based on your selection.

Understanding Your KPI Quick-Stats

1. Review the top row of colored cards for a high-level overview of your traffic.
2. **Outbound Messages:** The total number of messages successfully dispatched from your system.
3. **Inbound Replies:** The total volume of messages received from your customers.
4. **Delivery Rate:** The percentage of sent messages that successfully reached a customer's phone (a low rate may indicate an outdated contact list with invalid numbers).
5. **Read Rate:** The percentage of delivered messages that were actually opened by the customer.

How to Read the Visual Charts

1. Review the **Message Funnel Drop-off** chart to visually track the journey of your messages (Sent → Delivered → Read). A steep drop between "Delivered" and "Read" indicates that your message previews or initial hooks need to be more engaging.
2. Review the **Customer Engagement Time** heatmap (line chart). This tracks the exact hour of the day your inbound messages arrive. If the chart consistently spikes at 7:00 PM, you should schedule your Marketing and Cart Recovery blasts for that time to maximize visibility.

How to Track Template Performance

1. Scroll down to the **Marketing Template Leaderboard** at the bottom of the page.
2. Review the table to see the specific performance of every Meta-approved template you have sent.
3. Compare the "Total Read" and "Conversion Rate" columns. You can use this to A/B test two different promotional messages to definitively see which one yields better customer engagement.

Understanding Data Privacy (Permissions)

1. Be aware that the Analytics dashboard strictly adheres to your User Permissions settings.
2. If you are logged in as an **Administrator** or **Supervisor**, you will see global, company-wide data.

3. If a **Team Member** accesses this page, the system will automatically filter the charts to *only* display the analytics and read rates for the specific chats assigned to them.

