CLIENT ONBOARDING GUIDE

Welcome to Click2Go!

We're excited to have you onboard.

This guide outlines best practices for setting up and managing your WhatsApp and SMS communication services.

WhatsApp Service

Advertiser Module:

Steps to Create Your WABA:

1. Log in to your Meta Business account.
2. Navigate to the **Channels** section.
3. Select **WhatsApp**.
4. Log in with your Meta account (or create one using this guide).

Approval Timelines:

- **Standard Process:** Meta usually approves a WABA in 2–15 business days.
- **Direct Applications:** If you're applying without a Business Solution Provider (BSP), approvals may take longer (up to 7 weeks in some cases).

Once your WABA is approved and payment details are added, you're ready to connect your WhatsApp number with Click2Go and begin communicating with customers!

WhatsApp Template Creation: Best Practices

1. Improve Template Quality

- Use dynamic variables (e.g., customer name, last interaction).
- Avoid generic text.
- Example:

- o Poor: "Hi! Check our new offer."
- o Better: "Hi John, thanks for chatting with us last week. Here's your personalized update."

2. Encourage Opt-In & Engagement

- Use WhatsApp "Start Chat" buttons on your website.
- Share chat links: https://wa.me/91xxxxxxxxxx?text=Hi

3. Make Templates Contextual

- Reference prior user interactions.
- Personalize messages.

Important Note: Avoid using emojis in the **header** and **footer**.

WhatsApp Message Delivery Errors

Error 131049: Message not delivered due to Meta's engagement filters.

Why This Happens:

- Recipient hasn't interacted with your business.
- Template appears spammy or generic.
- Low quality score on your business number.
- You are contacting too many new users too quickly.

Meta's Filters Detect:

- Same template sent multiple times without engagement.
- No prior user interaction.
- Excessive frequency of messages.

How to Fix / Mitigate:

1. Warm Up Your Number

- Start with engaged users.
- Gradually increase volume.

2. Improve Message Quality

- Personalize, avoid spammy language.

3. Monitor Your Quality Score

- Check WhatsApp Manager > Number > "Quality Rating"

4. Ensure Opt-In

- Use clear opt-in mechanisms (site forms, chat links).

5. Avoid Resending Same Templates

- Change message structure or wait for user interaction before follow-up.

6. Track Interactions

- Maintain logs of:
  - Sent templates

  - ○ User replies
  - ○ Follow-up content

SMS Service

As per Indian government regulations, all businesses must register their SMS templates and sender IDs under the Distributed Ledger Technology (DLT) framework to ensure transparency, security, and compliance.

Using Click2Go Sender ID:

- Easy process; templates are pre-approved.

For New Sender ID & Templates, Required Documents:

- PAN (Company)
- Incorporation Certificate (CIN)
- Memorandum of Association (MOA)
- Director's PAN
- GSTIN (if available)

DLT Options:

1. **Urgent Activation (1 day):** INR 5,900
2. **Standard (2 days):** Free with purchase of 25,000 SMS package at INR 5,310

Template Tab Guidelines:

- Do **not** use emojis or full URLs (e.g., use "app.click2go.ai" instead of "https://app.click2go.ai").
- Maintain exact formatting – avoid spaces or special characters.

Audience Tab Guidelines:

- Ensure no space between names and phone numbers.
- Do **not** include country code for Indian numbers.

Campaign Creation Tips:

- Click **Top Up** (bottom left) before starting a campaign.
- Budget your campaign based on your selected plan.

Terms and Conditions for Communication

Applicable Regions: India, United States, Kenya

1. Acceptance of Terms

By accessing or using our messaging platform for WhatsApp Business (WABA) and SMS campaign services, you agree to comply with and be bound by these Terms and Conditions. If you do not agree, please refrain from using our services.

2. Service Scope

We provide cloud-based communication tools for:

- WhatsApp Business (WABA) integration and campaign management
- Bulk and transactional SMS delivery

- Campaign analytics, automation tools, and customer engagement features

You acknowledge and accept that our services are subject to country-specific telecommunication laws and Meta's WhatsApp policies.

3. User Responsibilities

You agree to:

- Use the services only for lawful, authorized purposes.
- Obtain **explicit opt-in consent** from all recipients before initiating any communication.
- Ensure your message templates follow regional and platform compliance standards (e.g., TRAI DLT, TCPA, CAK).
- Register templates and sender IDs where applicable (e.g., DLT in India).
- Comply with **Do Not Disturb (DND)** registries and **quiet hour** restrictions.

4. Message Timing Restrictions

You agree not to send **promotional messages** outside the following time windows:

Country	Permitted SMS Timing (Promo)	WABA Messaging (Recommended)
India	9 AM – 9 PM	8 AM – 9 PM (voluntary)
USA	8 AM – 9 PM (recipient time)	8 AM – 9 PM (voluntary)
Kenya	8 AM – 8 PM (recommended)	8 AM – 8 PM (recommended)

Transactional and service messages may be allowed outside these windows per local laws.

5. Data Privacy and Security

We are committed to protecting the privacy of your customer data in line with applicable data protection laws:

- **India:** Compliant with the **Digital Personal Data Protection Act (DPDP 2023)**
- **USA:** Compliant with **TCPA**, **CCPA**, and other state-level laws
- **Kenya:** Compliant with the **Data Protection Act, 2019**

All message data and customer information are:

- Encrypted in transit and at rest
- Stored securely within compliant data centers
- Not shared with third parties without user or regulatory consent

6. Platform Use and Restrictions

You agree not to:

- Send unsolicited, abusive, or spam messages
- Impersonate another business or entity
- Transmit content that is unlawful, defamatory, or violates any third-party rights
- Use WABA or SMS channels to send financial, health, or personal data without consent and lawful basis

We reserve the right to suspend or terminate access if misuse is detected.

7. Billing and Payment

- Services are billed based on usage, message volume, and pricing plans as agreed in your contract.
- Invoices must be settled within the payment period stated (typically net 15 or 30 days).

• Delayed payments may result in suspension of service.

8. Limitation of Liability

We shall not be liable for:

• Delays or failures in message delivery caused by carrier/network issues
• Penalties incurred by clients due to regulatory non-compliance from their end
• Damages resulting from unauthorized or improper use of the services

9. Governing Law

These Terms are governed by the applicable laws of your operational region:

• **India:** Indian Contract Act, IT Act, DPDP
• **USA:** Federal and State laws including TCPA, CCPA
• **Kenya:** KICA and Data Protection Act, 2019

10. Amendments

We reserve the right to modify these Terms and Conditions at any time. Updated terms will be posted on our website and become effective immediately upon posting.

Need help? Our team is here to support you every step of the way.

Let's build smarter customer conversations together!

Email to **support@clcik2go.ai**

Compliance Checklist: WABA & SMS Campaigns

For India, USA, and Kenya – 2025 Edition

IN INDIA – TRAI & DPDP COMPLIANCE

SMS Campaigns

- ☐ **DLT Registration Completed** with operators (e.g., Jio, Airtel, Vodafone)
- ☐ **Sender ID (Header)** is pre-approved via DLT portal
- ☐ **All templates** submitted and approved via DLT
- ☐ Promotional messages restricted to **9 AM – 9 PM**
- ☐ **DND list** checks before sending
- ☐ Customer consent stored and traceable

WhatsApp Business API

- ☐ Customer **opt-in** collected (website, form, QR, chat)
- ☐ Using **approved template messages**
- ☐ Using **Meta-approved BSP**
- ☐ Messages not sent to users outside expected hours unless transactional
- ☐ Data stored in compliance with **DPDP Act 2023**
- ☐ No sharing of personal data without user consent

us USA – TCPA, CTIA, CCPA

SMS Campaigns

- ☐ **Express written consent** collected for each contact
- ☐ Messages only sent **8 AM – 9 PM (recipient's time zone)**
- ☐ "STOP to opt-out" included in every campaign
- ☐ Opt-out system is **automated and honored immediately**
- ☐ **Do Not Call (DNC)** registry respected
- ☐ Clear **privacy policy** available (for CCPA)
- ☐ Message volume throttled to avoid carrier blacklisting

WhatsApp Business API

- ☐ Customer opt-in policy documented
- ☐ Message templates approved by Meta
- ☐ 24-hour customer reply window monitored
- ☐ CCPA-compliant privacy controls in place
- ☐ No collection of sensitive data (financial, health) without consent

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ke KENYA – CAK & DATA PROTECTION ACT

SMS Campaigns

- ☐ Registered with the **Communications Authority of Kenya (CAK)** (if local SMS provider)
- ☐ User **opt-in and unsubscribe** mechanisms active

- ☐ Promotional messages limited to **8 AM – 8 PM (recommended)**
- ☐ Complaint handling system for unsolicited SMS
- ☐ Compliant with **Kenya's Data Protection Act (2019)**

WhatsApp Business API

- ☐ Consent explicitly captured before any outbound messaging
- ☐ Data processing policy aligned with Kenya's **ODPC** guidelines
- ☐ Message delivery only during customer-friendly hours
- ☐ BSP relationship established with Meta or aggregator

GENERAL SECURITY & DATA POLICY

- ☐ All customer data is **encrypted in transit and at rest**
- ☐ Role-based access control (RBAC) implemented internally
- ☐ No sensitive data shared via chat unless encrypted/authorized
- ☐ Periodic audits for compliance and data retention
- ☐ Internal training on TCPA, DPDP, CCPA, and regional privacy laws

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DOCUMENTATION TO MAINTAIN

- ☐ Consent logs (opt-in/opt-out timestamps)
- ☐ Approved message templates (DLT + Meta)
- ☐ Privacy policy and user data handling terms
- ☐ Regional compliance certificates (if available)
- ☐ Daily campaign reports + bounce/failure logs
- ☐ User complaints and resolution logs

Thank You