

How To Create Utility Template

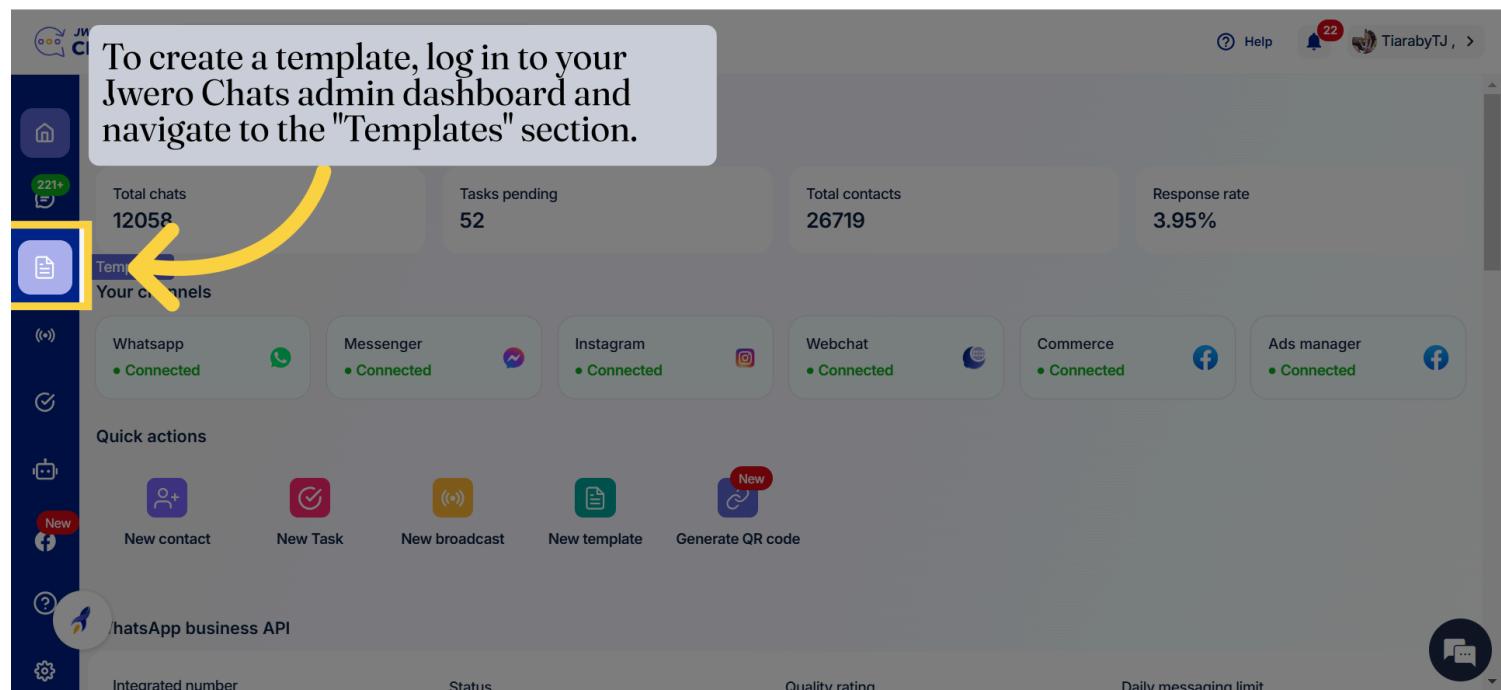


This guide will walk you through a series of actions to efficiently utilize the Utility Template feature in Jwero.

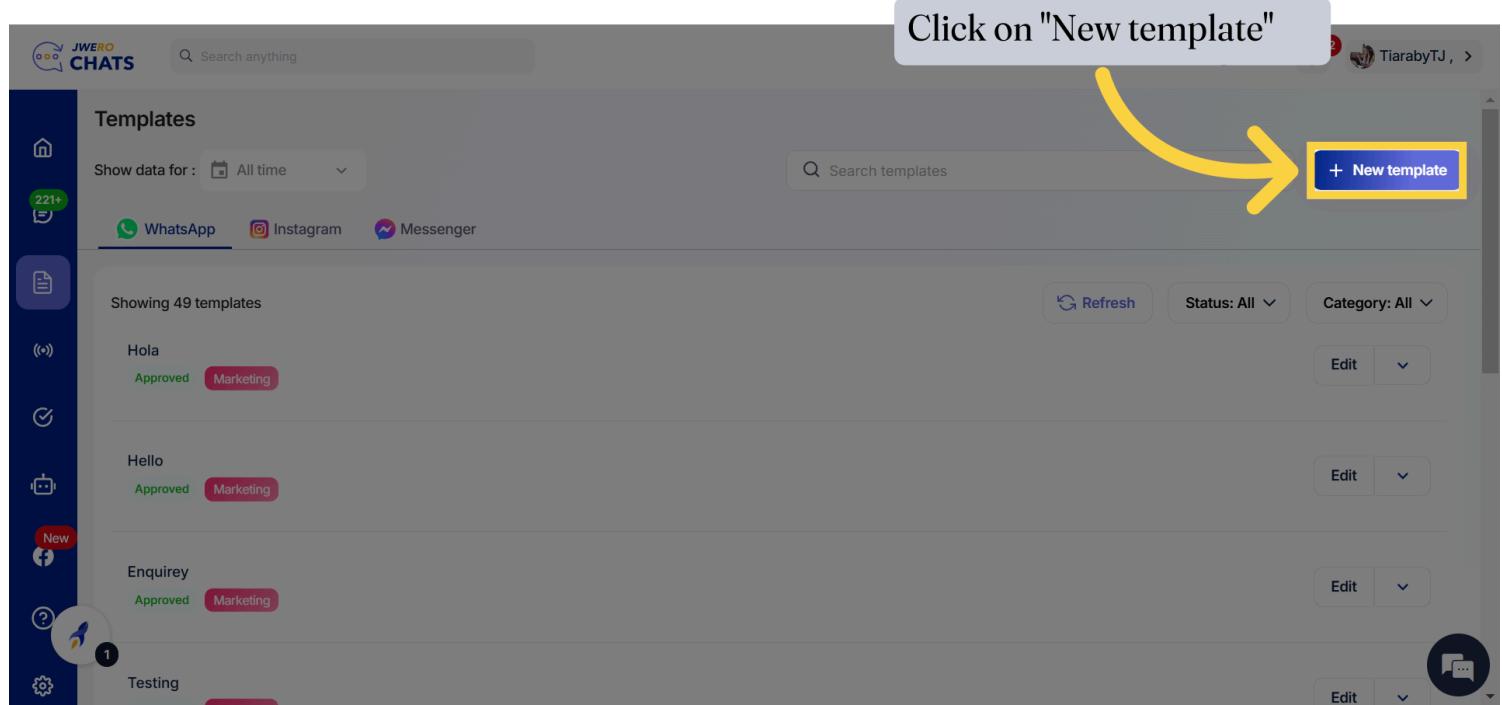
1. Utility templates

Utility templates are primarily used for sending transactional messages, including order confirmations, shipping updates, customer support responses, and service notifications.

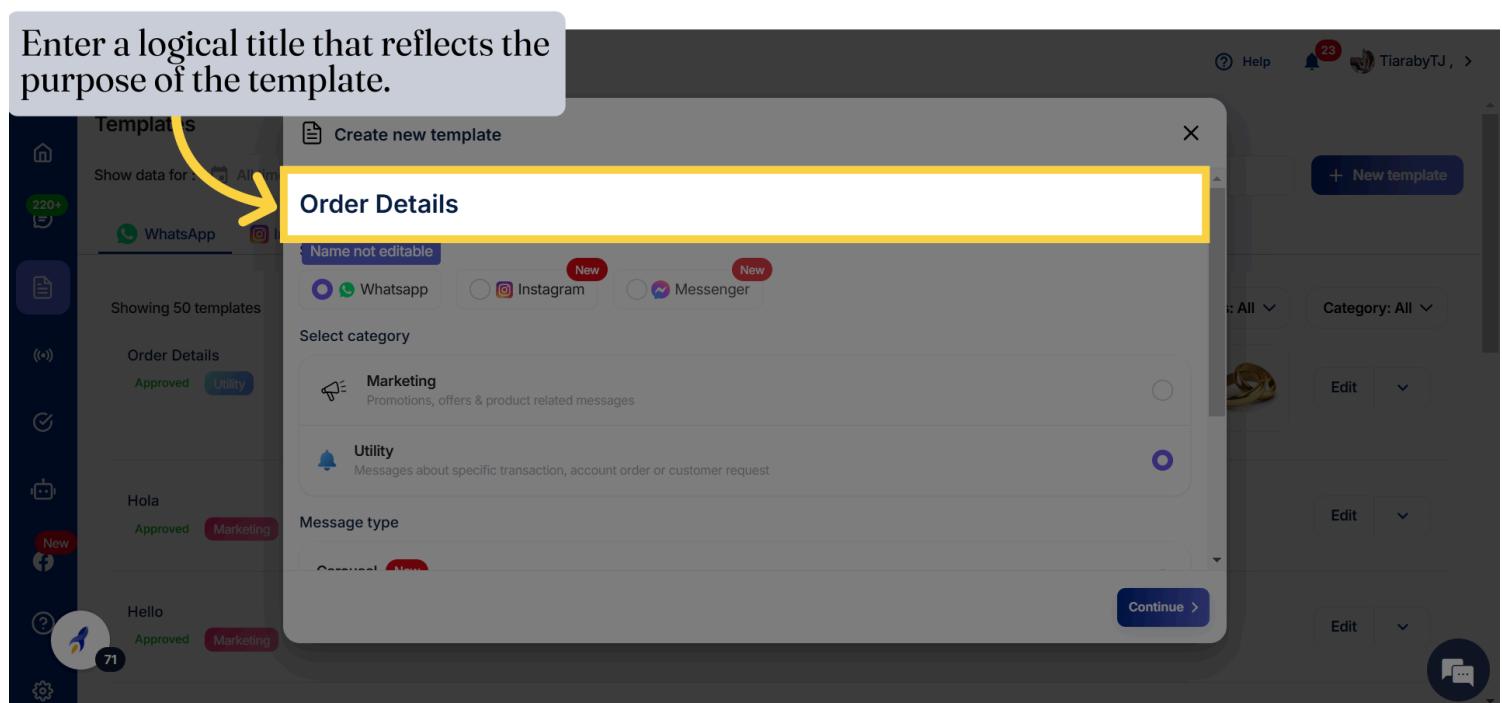
2. To create a template, log in to your Jwero Chats admin dashboard and navigate to the "Templates" section.



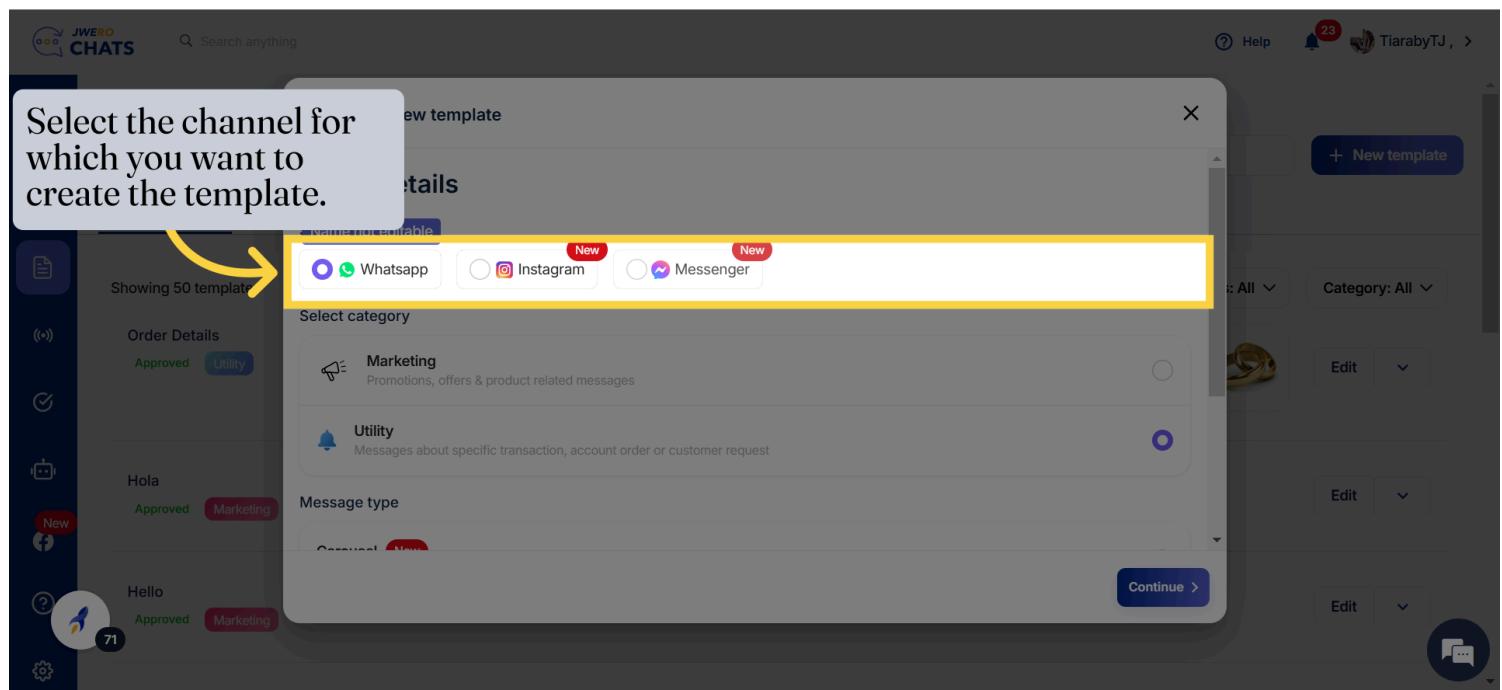
3. Click on "New template"



4. Enter the title name

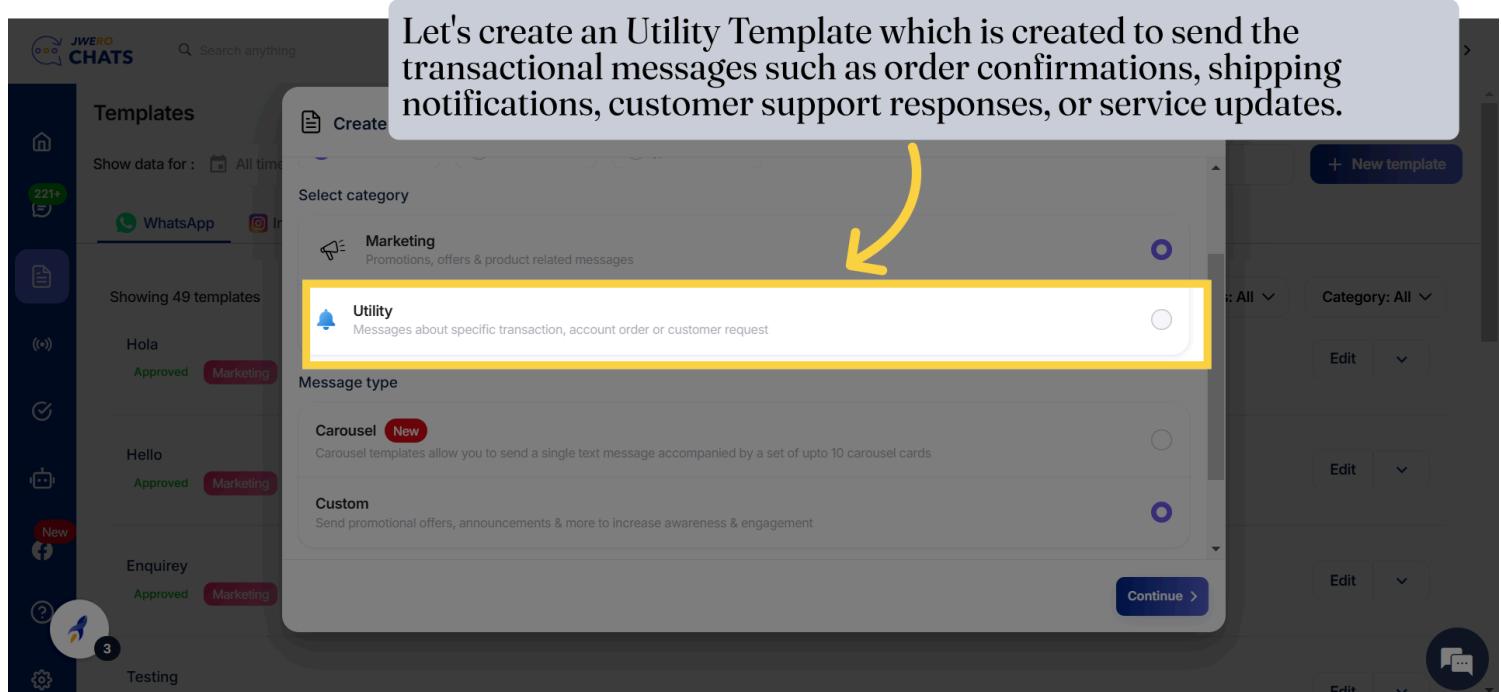


5. Select the channel

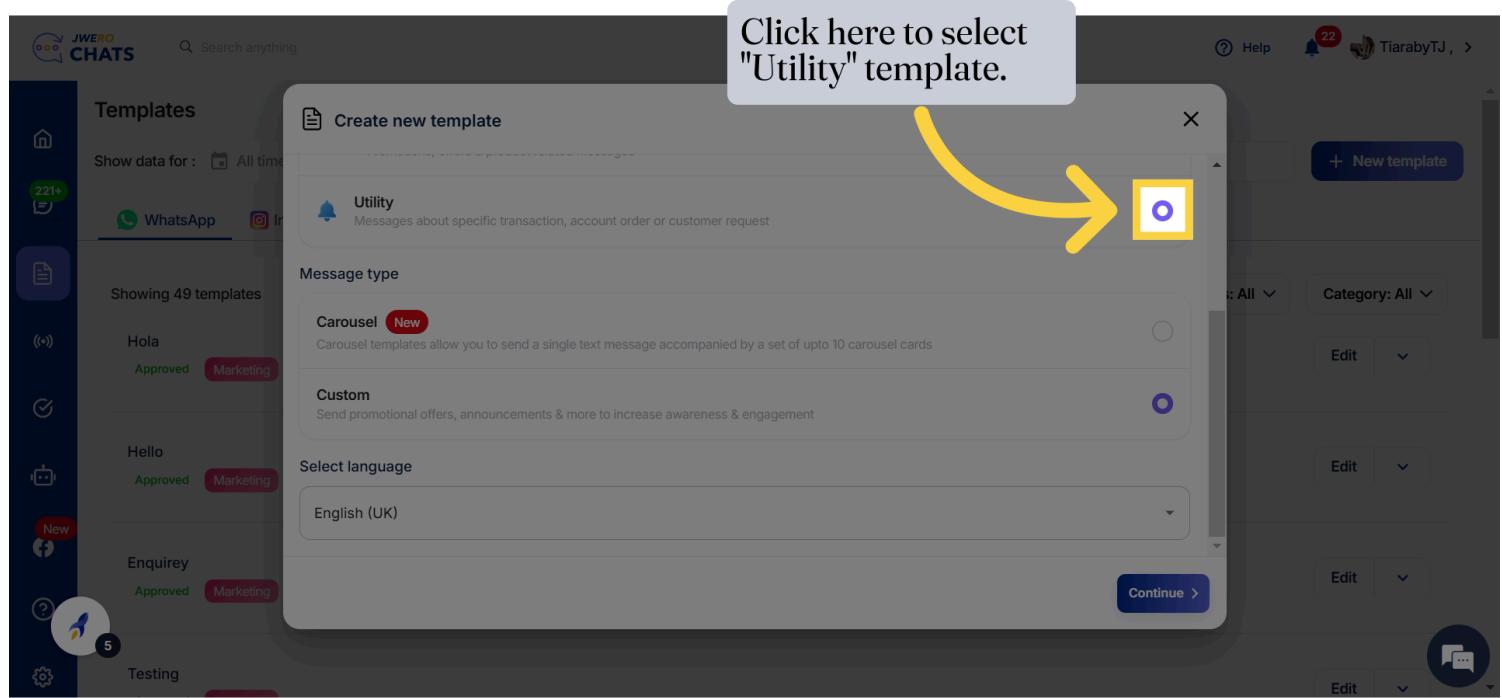


6. Select Category

Utility Template is created to send the transactional messages such as order confirmations, shipping notifications, customer support responses, or service updates.



7. Select "Utility" template.



8. Message Type

You are allowed 2 types of Message type:

- 1) Carousel : Allows you to send up to 10 images along with the description.
- 2) Custom : Allows to send the standard messages.

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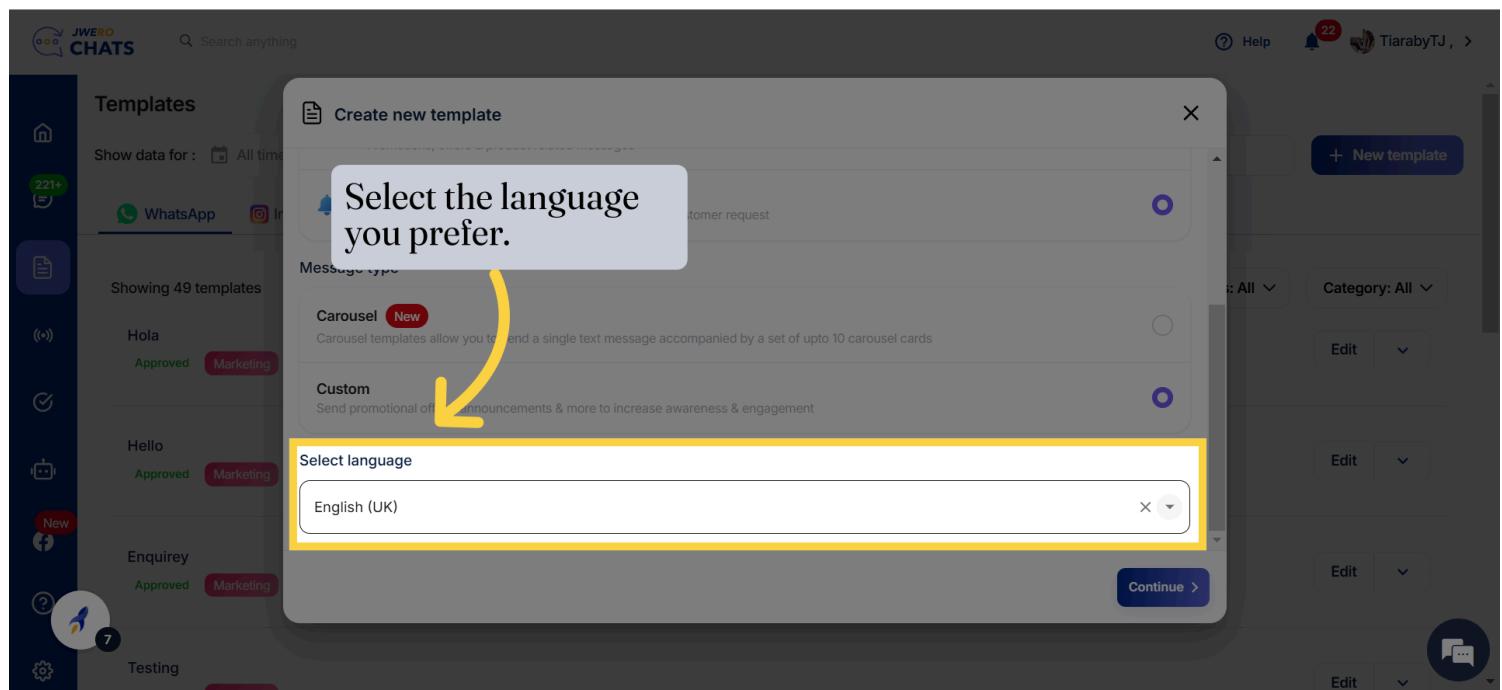
- 1) Carousel : Allows you to send up to 10 images along with the description.
- 2) Custom : Allows to send the standard messages.

The screenshot shows the JWERO CHATS software interface. In the center, a modal window titled 'Create new template' is open. At the top of this modal, there is a section labeled 'Message type' with two options: 'Carousel' (marked as 'New') and 'Custom'. The 'Custom' option is highlighted with a yellow background and has a blue circular selection indicator next to it. Below this, there is a 'Select language' dropdown set to 'English (UK)'. At the bottom right of the modal is a 'Continue >' button. The background of the main interface shows a list of existing templates like 'Hola', 'Hello', and 'Enquiry', each with status indicators 'Approved' and 'Marketing'.

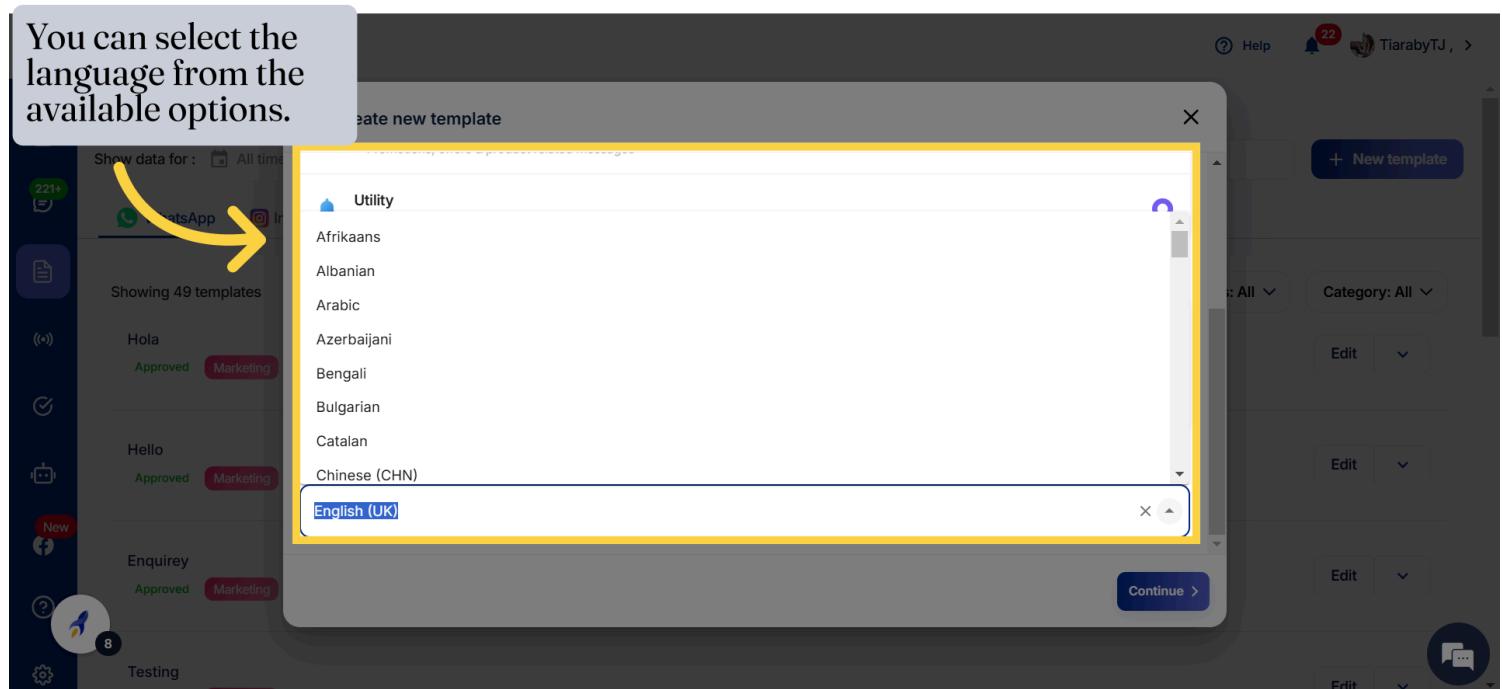
9. Custom Message Type

The screenshot shows the JWERO CHATS software interface, similar to the previous one but with a different callout. The 'Create new template' modal is open, and the 'Custom' message type is highlighted with a yellow background and a blue circular selection indicator. A large yellow arrow points from this highlighted area towards a callout bubble. The callout bubble contains the text: 'Let's choose "Custom" to share the informative details.' The rest of the interface and modal are identical to the previous screenshot.

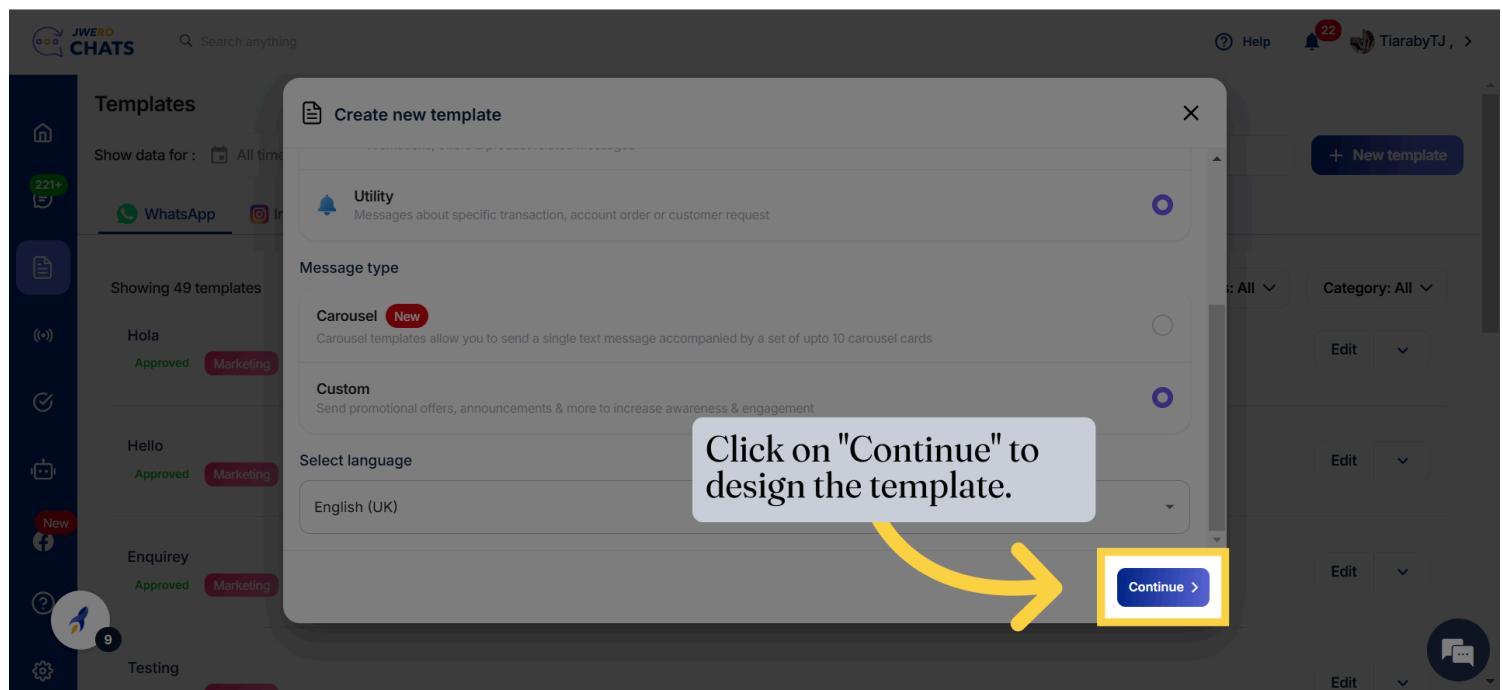
10. Select the language you prefer.



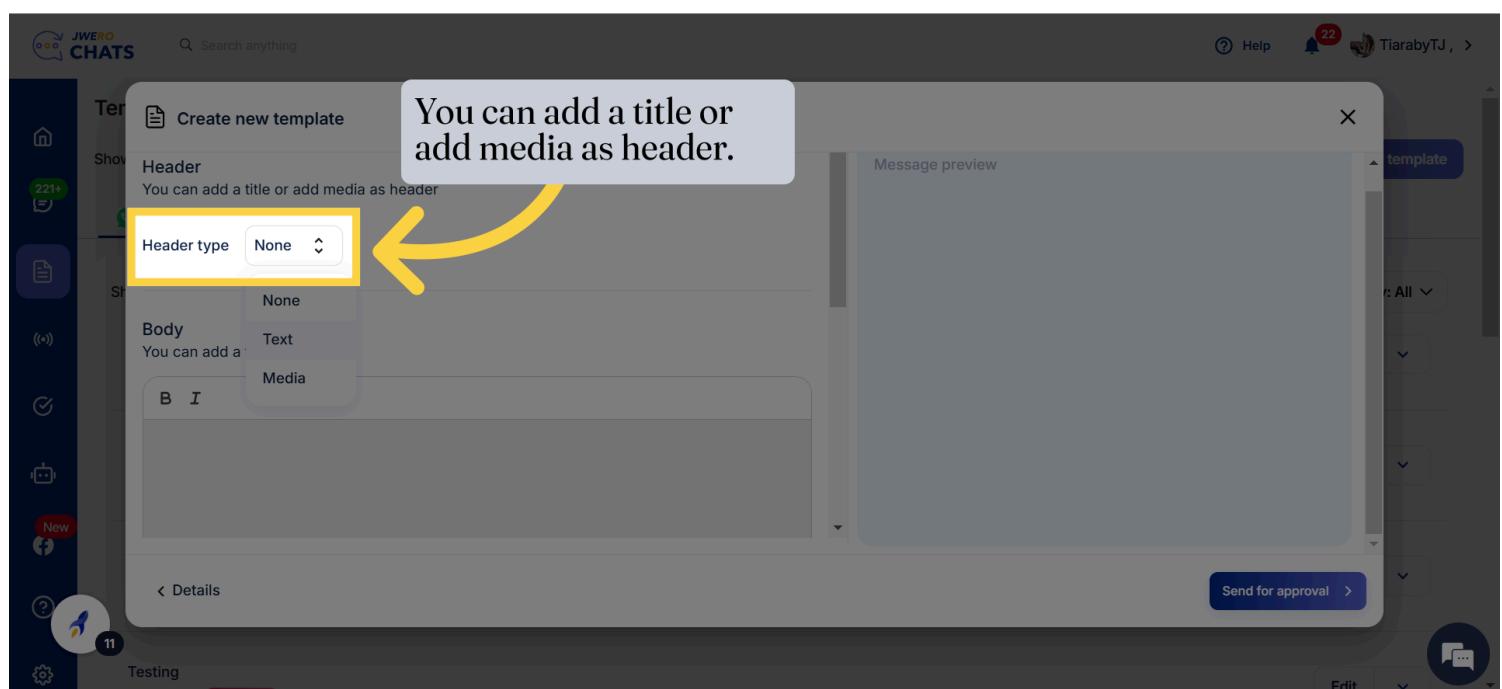
11. You can select the language from the available options.



12. Click on "Continue" to design the template.



13. You can add a title or add media as header.

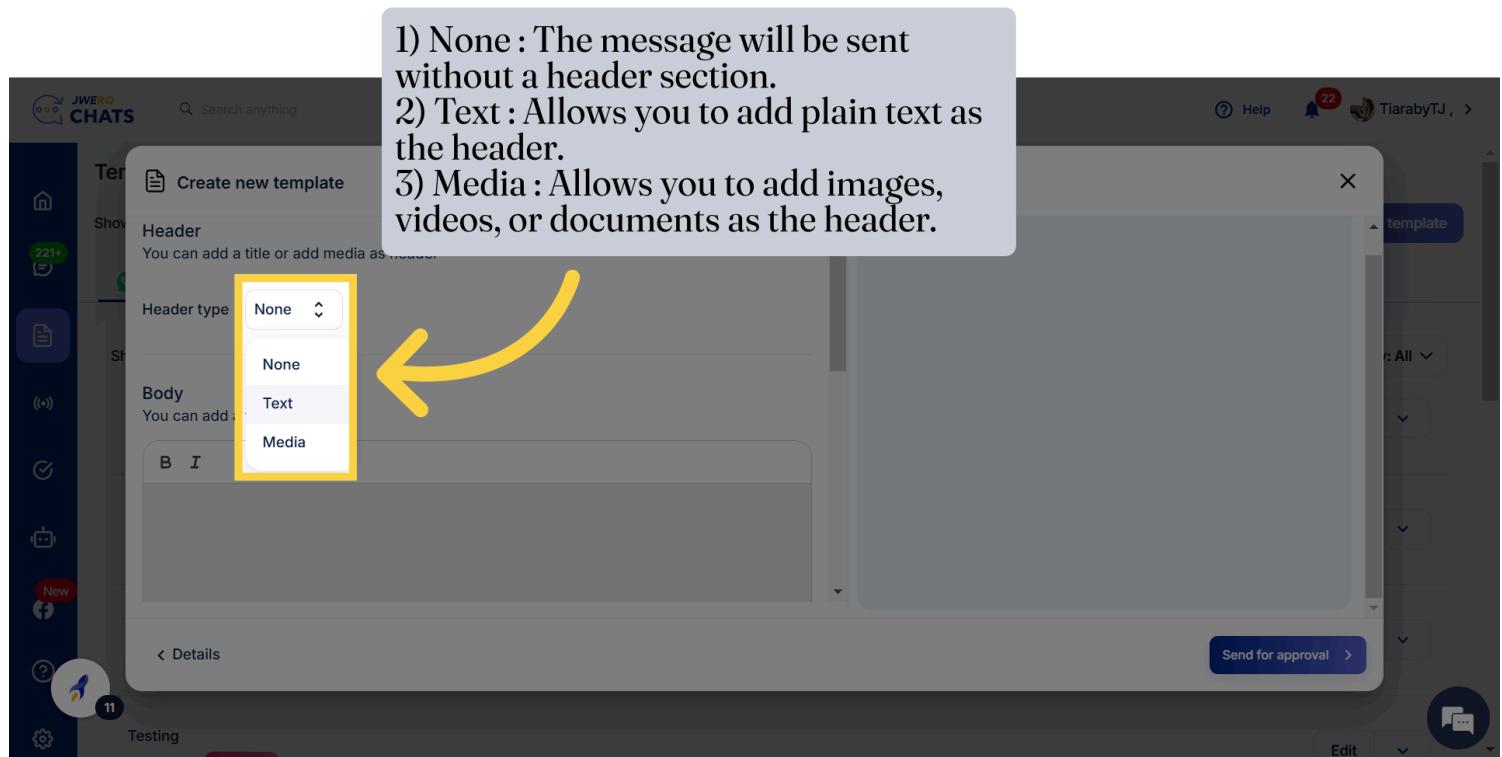


14. Header Type

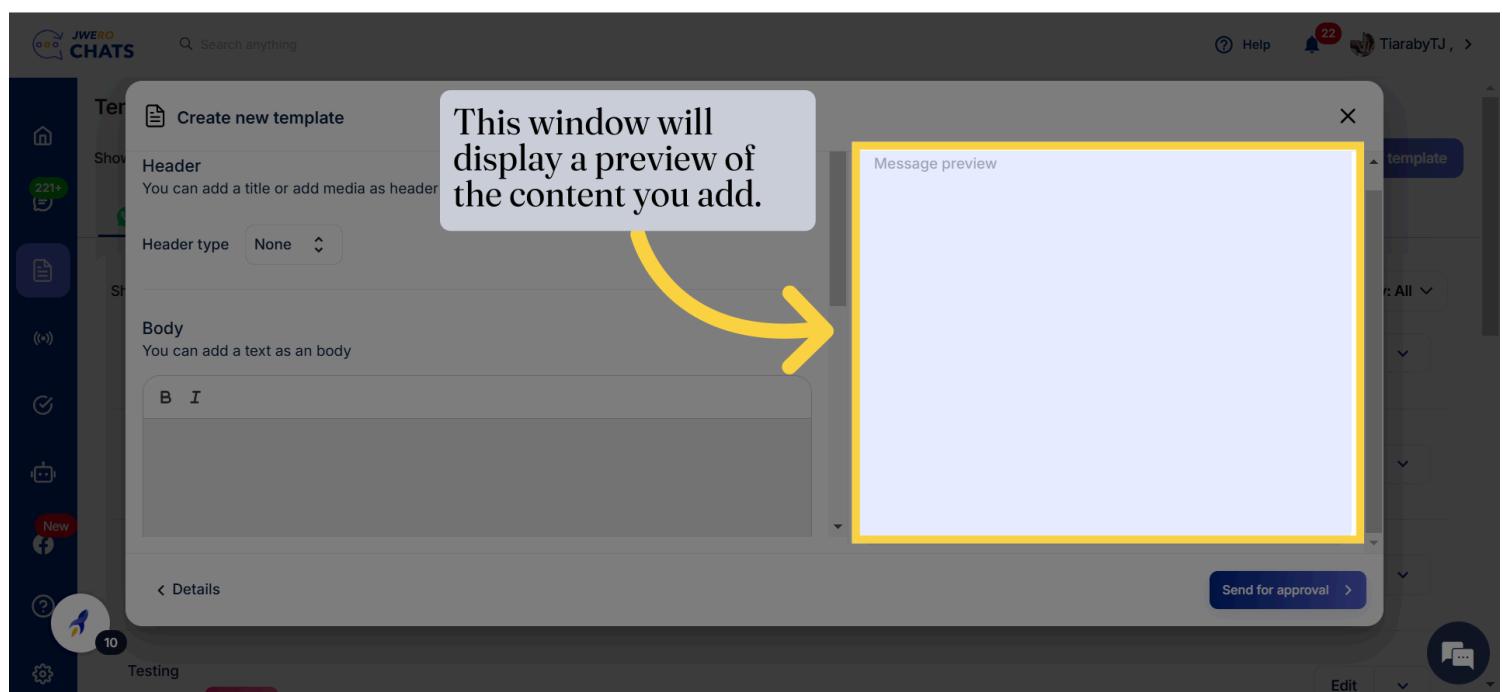
1) None : The message will be sent without a header section.

2) Text : Allows you to add plain text as the header.

3) Media : Allows you to add images, videos, or documents as the header.



15. This window will display a preview of the content you add.



16. When you select the header as text, this is how the header will appear.

The screenshot shows the JWERO CHATS software interface. A modal window titled "Create new template" is open. In the "Header" section, there is a text input field containing "Your Order Has Been Shipped!". This field is highlighted with a yellow box and has a yellow arrow pointing from it to a "Message preview" window on the right. The "Message preview" window also contains the text "Your Order Has Been Shipped!" and is itself highlighted with a yellow box. The main interface shows various icons and a sidebar with a "Testing" tab selected.

17. When you select the header type as media, you can choose the media type from the available options.

The screenshot shows the JWERO CHATS software interface. A modal window titled "Create new template" is open. In the "Header" section, the "Header type" dropdown is set to "Media". A yellow box highlights this dropdown, and a yellow arrow points to a dropdown menu below it. The menu is titled "Media type" and contains three options: "Image", "Video", and "Document". The "Image" option is selected. To the right of the dropdown, there is a placeholder image icon of a mountain landscape. The main interface shows various icons and a sidebar with a "Testing" tab selected.

18. You can upload the file based on the media type you selected. For the media type "Image," simply upload the image file.

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Header type: Media

Media type: Image

Upload sample image

Body: You can add a text as an body

Send for approval

19. This is how the image will appear in the header. Similarly, you can choose the video or document in the header.

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Header: You can add a title or add media as header

Header type: Media

Media type: Image

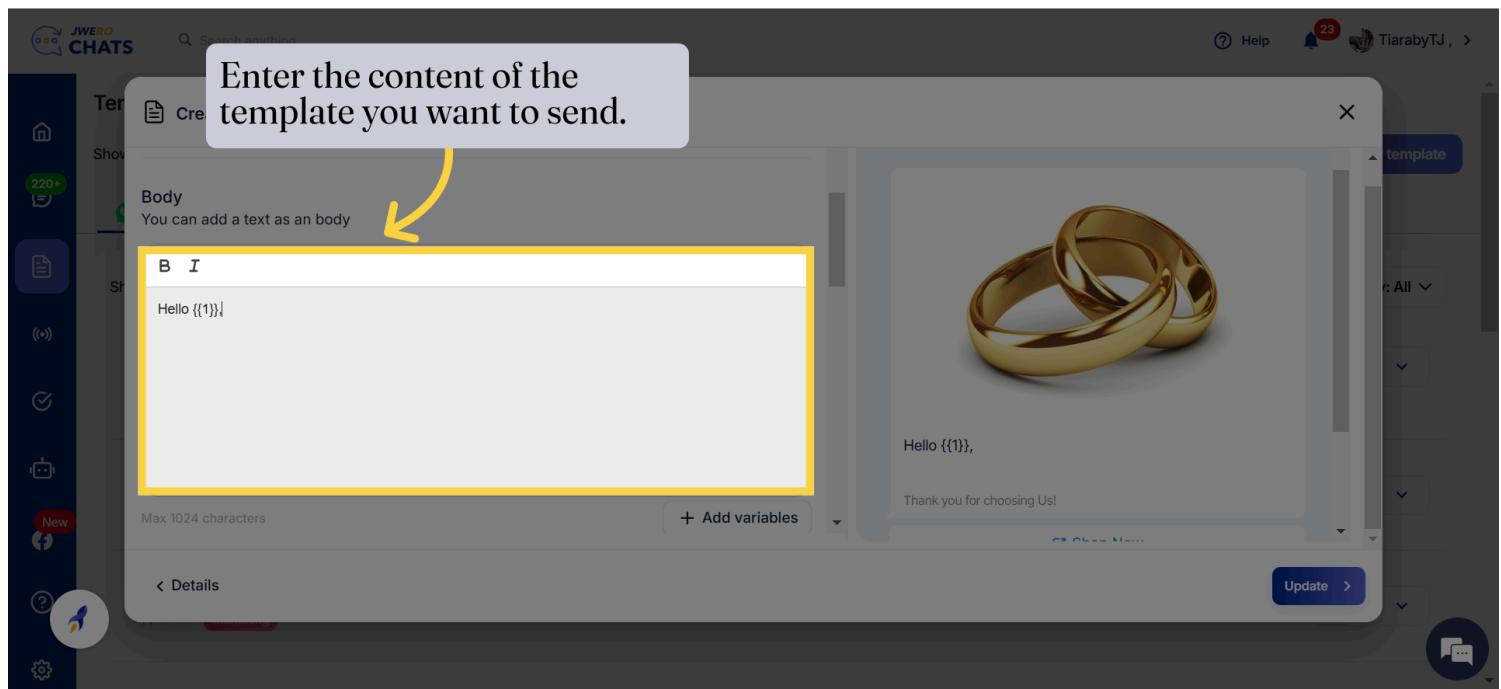
Upload sample image: ring.jpg

Body: You can add a text as an body

Message preview: A diamond ring in a gold setting.

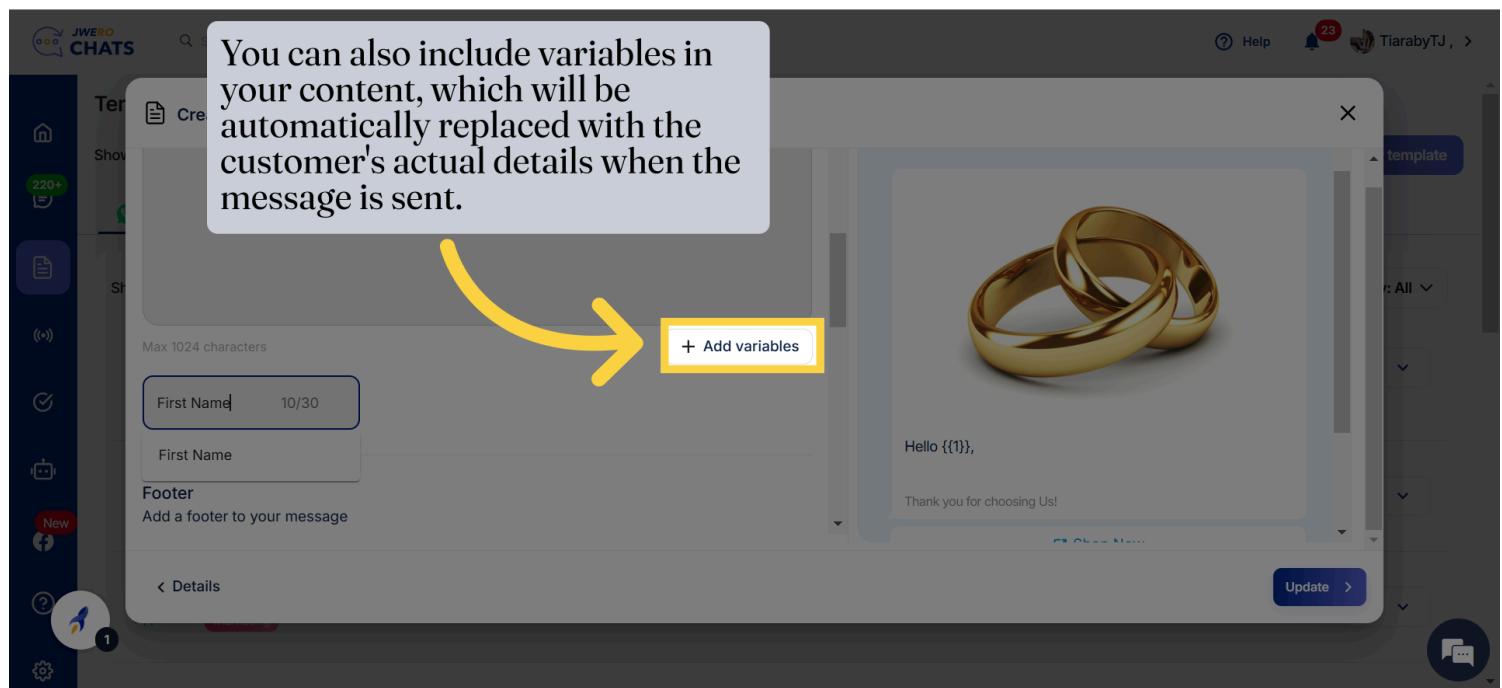
Send for approval

20. Enter the template content



21. You can also include variables in your content, which will be automatically replaced with the customer's actual details when the message is sent.

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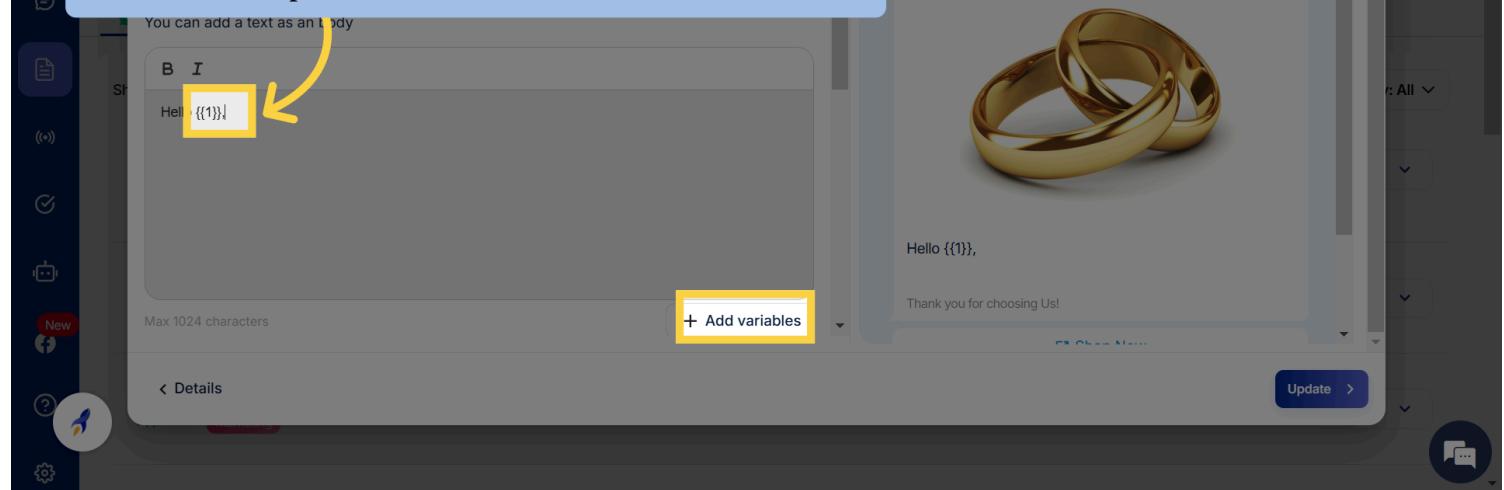
22. Place the cursor where you want to add the variable, and then click on "Add variable".

The variable names will follow the order in which they are added. For example:

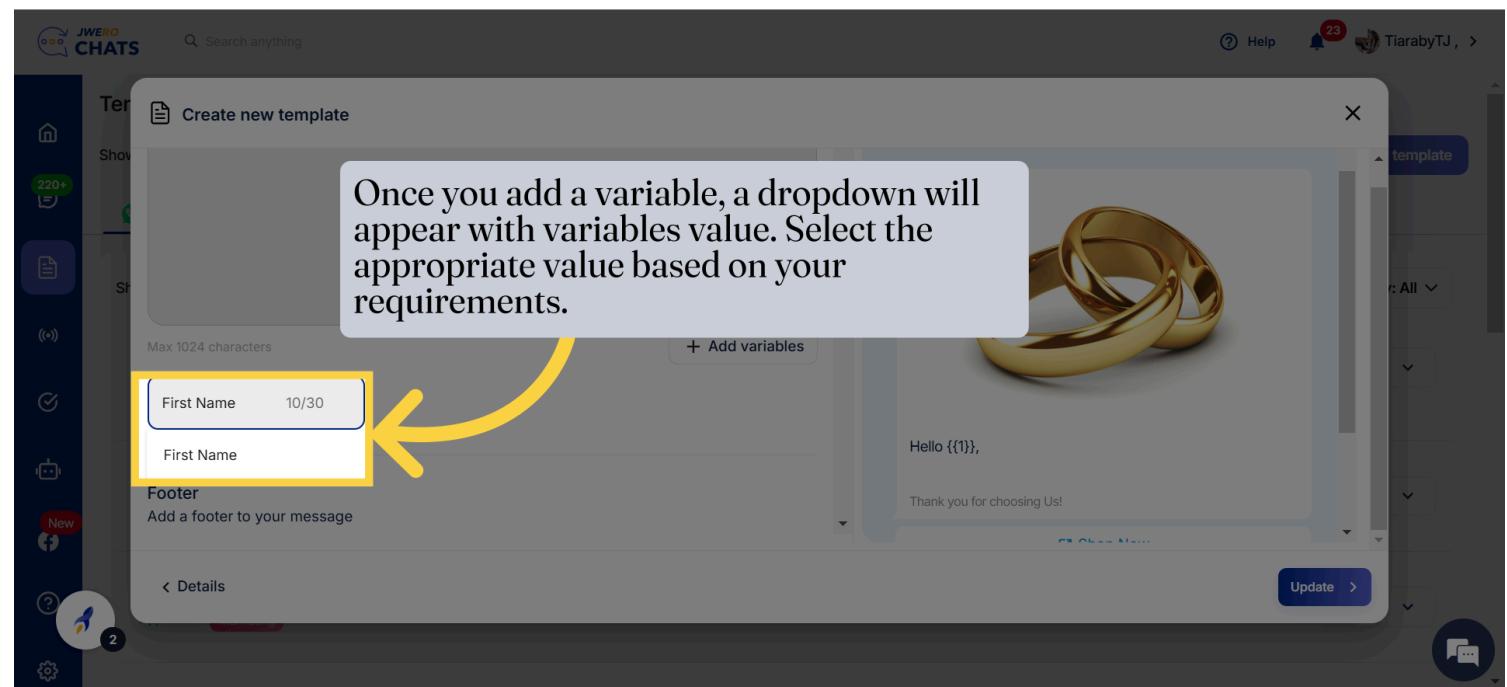
- The first variable will be named `{ {1} }`.
- The second variable will be named `{ {2} }`.
- This pattern will continue sequentially for subsequent variables.

Place the cursor where you want to add the variable, and then click on "Add variable."

Note : You may encounter error if,
1) The variable is at the beginning or at the end.
2) There is a space after the variable.

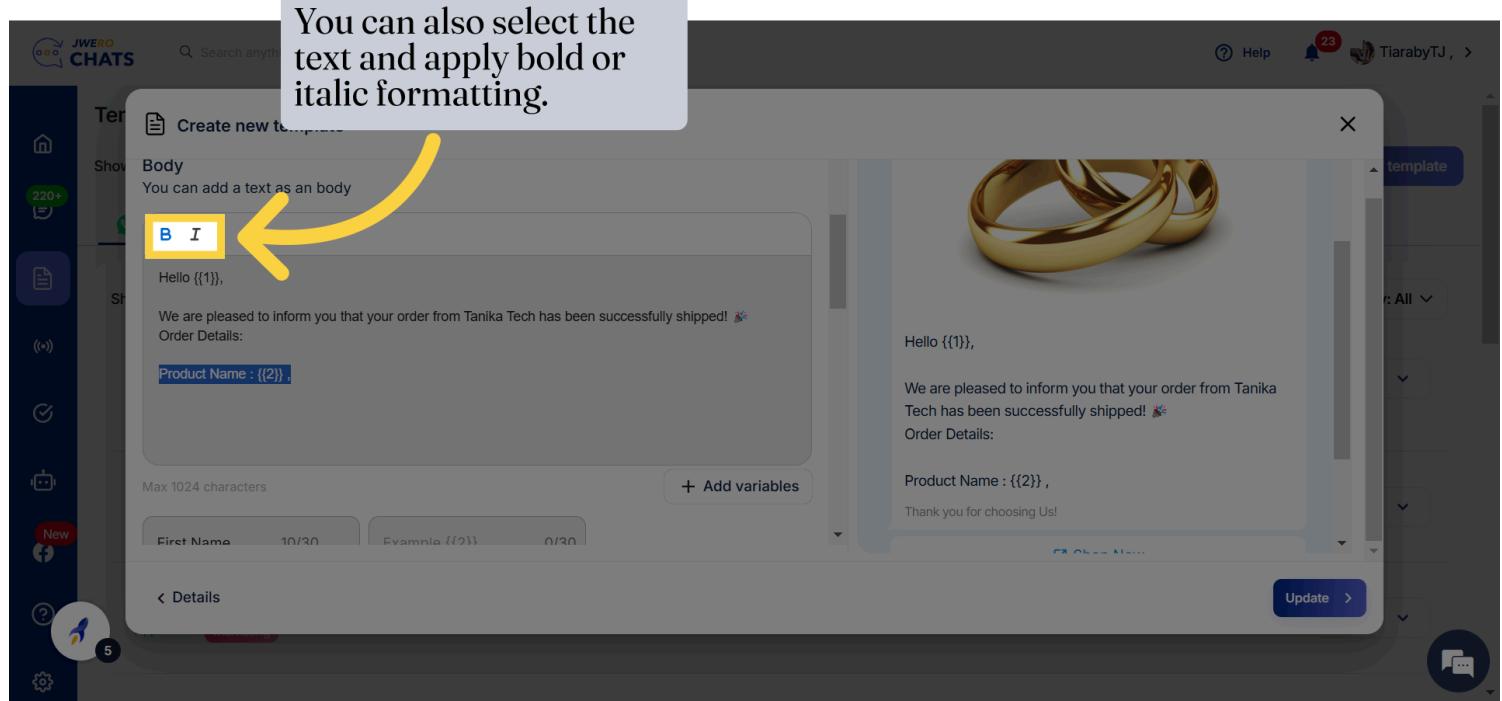


23. Once you add a variable, a dropdown will appear with variables value. Select the appropriate value based on your requirements.



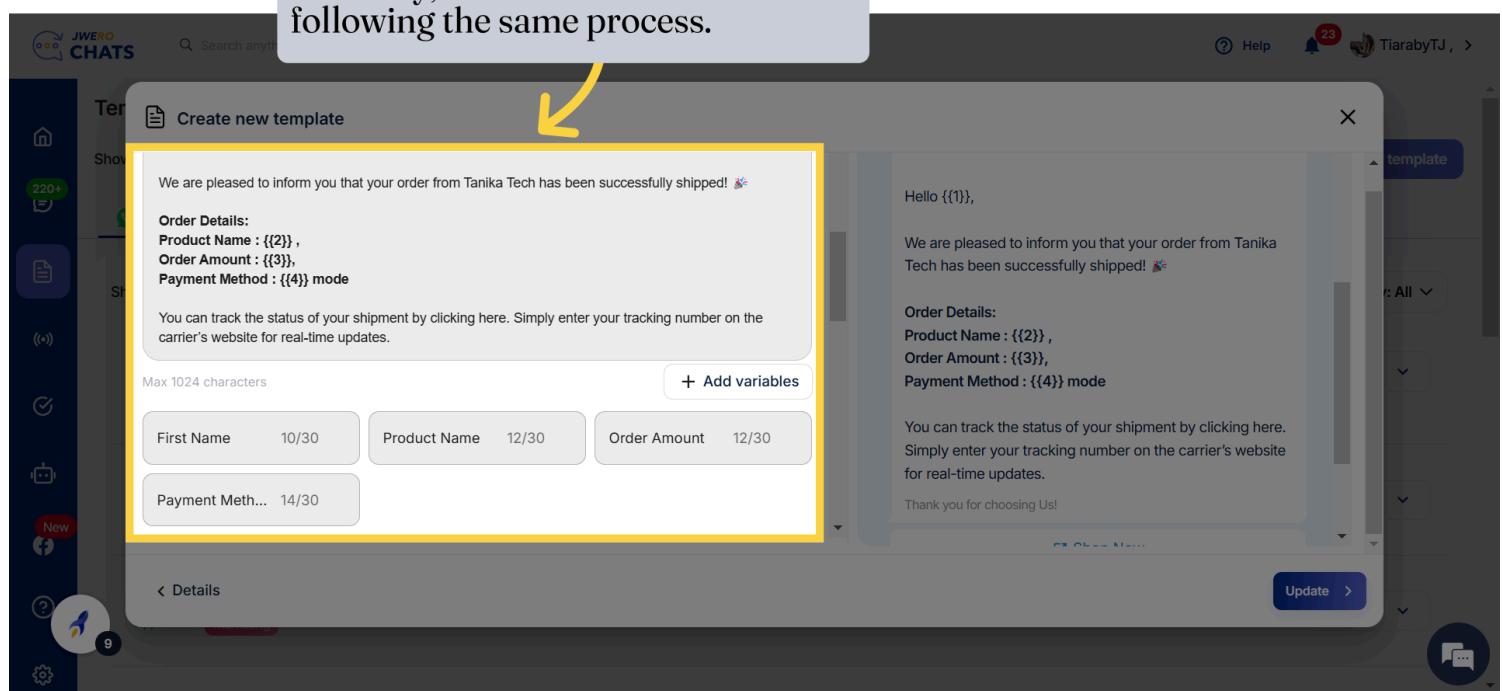
24. You can also select the text and apply bold or italic formatting.

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25. Similarly, let's add more variables following the same process.

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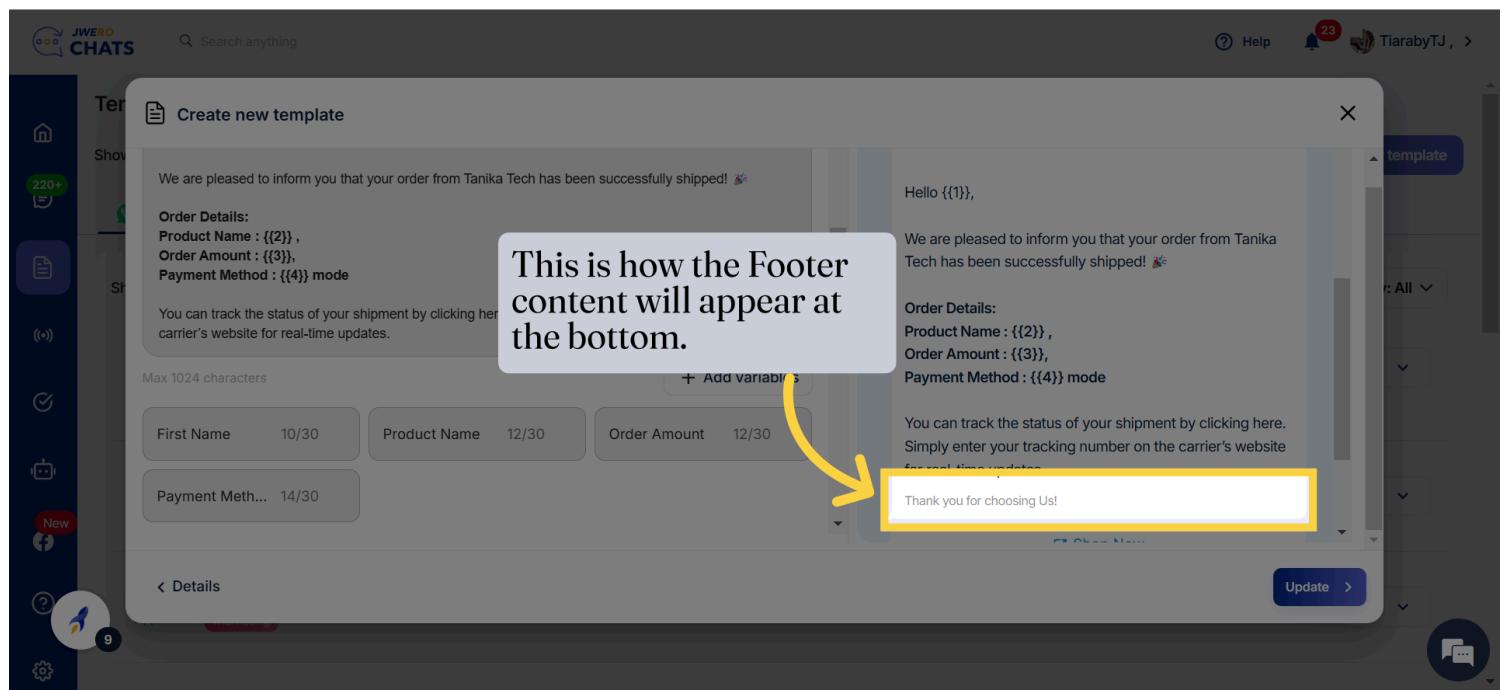
26. This is how the content will appear below the header in the template.

This screenshot shows the JWERO Chats platform interface. A modal window titled "Create new template" is open. Inside the modal, there is a large text area containing a message about a successfully shipped order. Below this message, there are input fields for "First Name" (10/30), "Product Name" (12/30), "Order Amount" (12/30), and "Payment Meth..." (14/30). A button labeled "+ Add variables" is located at the bottom right of the input area. A yellow callout box with an arrow points from the text "This is how the content will appear below the header in the template." to the main message area. To the right of the modal, a preview of the template is shown in a separate window, also containing the order message and input fields.

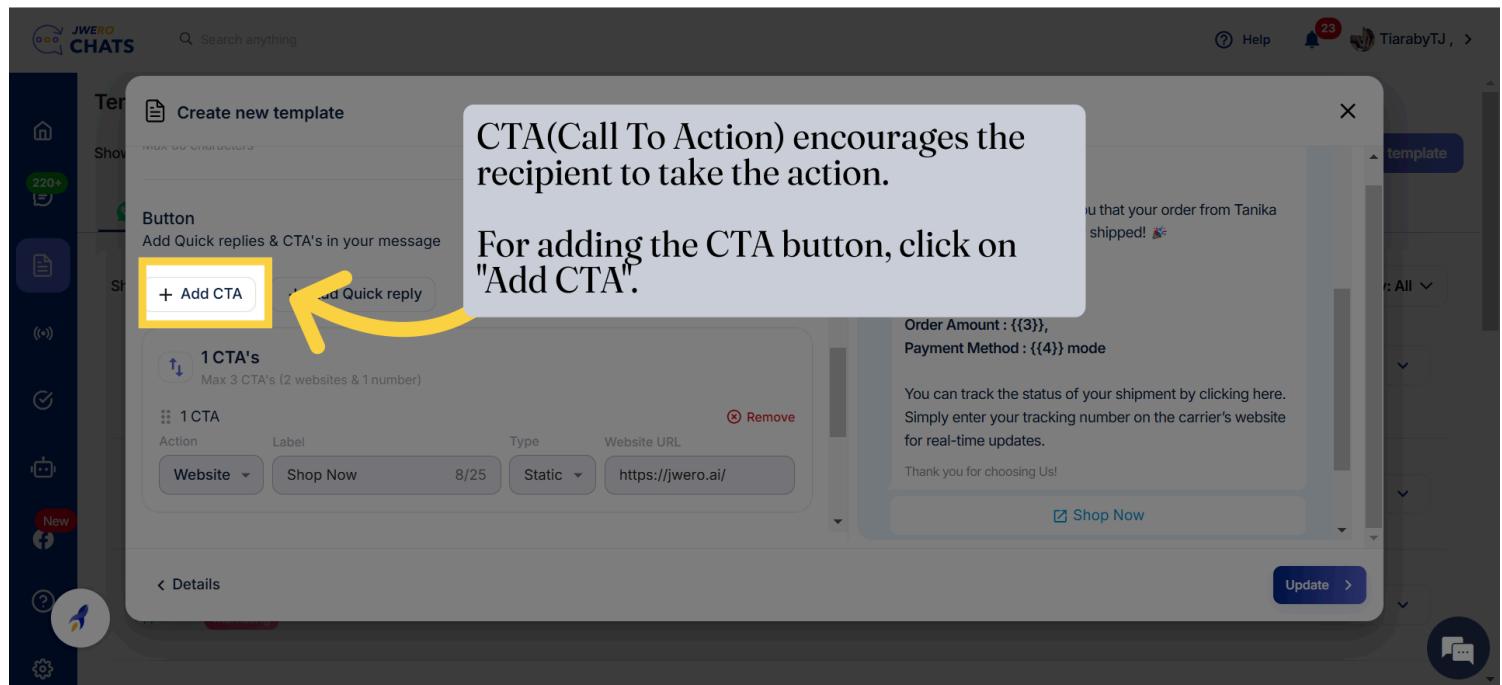
27. Enter the footer content, keeping it within 60 words.

This screenshot shows the JWERO Chats platform interface. A modal window titled "Create new template" is open. In the bottom left corner of the modal, there is a section labeled "Footer" with the sub-instruction "Add a footer to your message". Below this, a text input field contains the text "Thank you for choosing Us!". To the right of the input field, the character count "27/60" is displayed. A yellow callout box with an arrow points from the text "Enter the footer content, keeping it within 60 words." to the footer section. To the right of the modal, a preview of the template is shown in a separate window, containing the order message, input fields, and the footer text "Thank you for choosing Us!".

28. This is how the content will appear below the header in the template.



29. Add CTA (Call To Action)

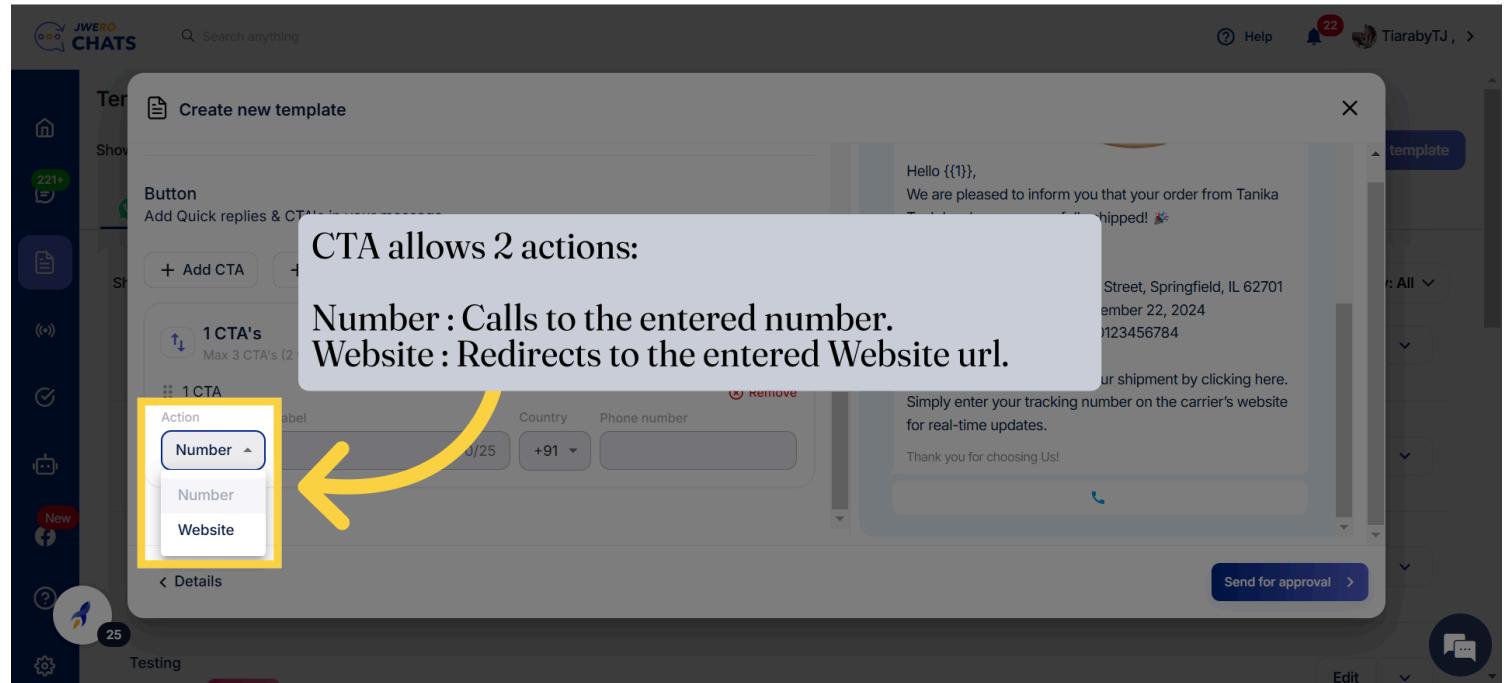


30. CTA allows 2 actions: Number : Calls to the entered number. Website : Redirects to the entered Website url.

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Number : Calls to the entered number.

Website : Redirects to the entered Website url.



31. Number CTA

For the "Number" CTA, enter the following details:

Label : This will be the text displayed on the button. For eg : Call.

Country : Select the appropriate country code.

Phone Number : Enter the phone number that the CTA button will redirect to.

The screenshot shows the JWERO CHATS interface with a modal window titled 'Create new template'. In the 'Button' section, there is a 'Number' CTA entry. The 'Action' dropdown is set to 'Number', the 'Label' is 'Call', the 'Country' is '+91', and the 'Phone number' is '8789888543'. A yellow arrow points to this entry.

32. This is how the Number CTA button will look like.

This is how the Number CTA button will look like.

The screenshot shows the JWERO CHATS interface with a message template. The template content includes: 'Hello {{1}}, We are pleased to inform you that your order from Tanika Tech has been successfully shipped.' Below this, there is a 'Call' CTA button. A yellow arrow points to this button.

33. Website CTA

For the "Website CTA", enter the following details:

Label : The text that will appear on the button. For eg : Shop Now.

Type : Select either dynamic or static.

Website URL : Enter the URL of the website you want the button to redirect to.

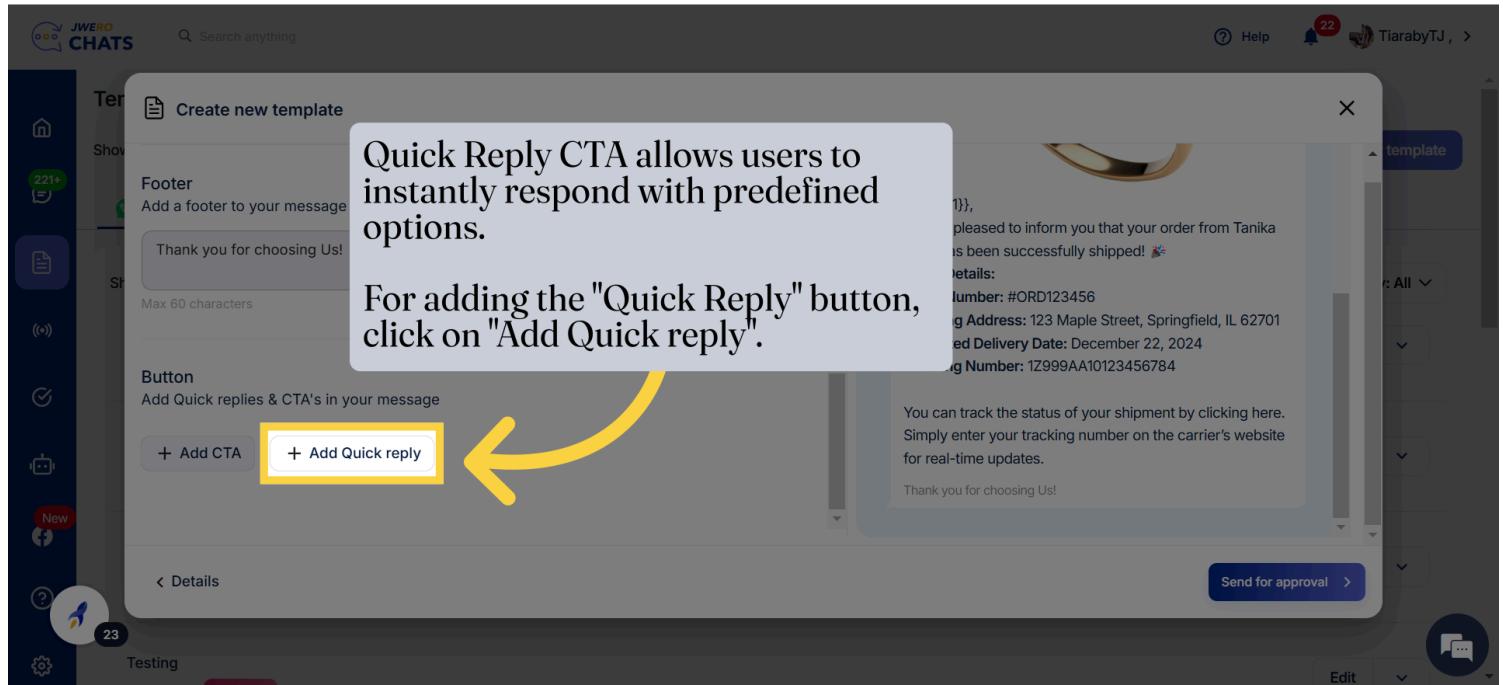
The screenshot shows the JWERO Chats software interface. On the left, there's a sidebar with various icons and a message count of '2'. The main area is titled 'Create new template'. In the center, there are two sections for CTAs: one for 'Number' (Action: Call, Label: Call, Country: 4/25, Phone number: 8789888543) and another for 'Website' (Action: Website, Label: Shop Now, Type: Static, Website URL: https://jwero.ai/). A yellow box surrounds the 'Website' CTA section, and a yellow arrow points from it to the preview window on the right. The preview window displays a message about tracking status, followed by a 'Call' button and a 'Shop Now' button, with the 'Shop Now' button highlighted by a yellow box and arrow.

34. This is how the Website CTA button will look like.

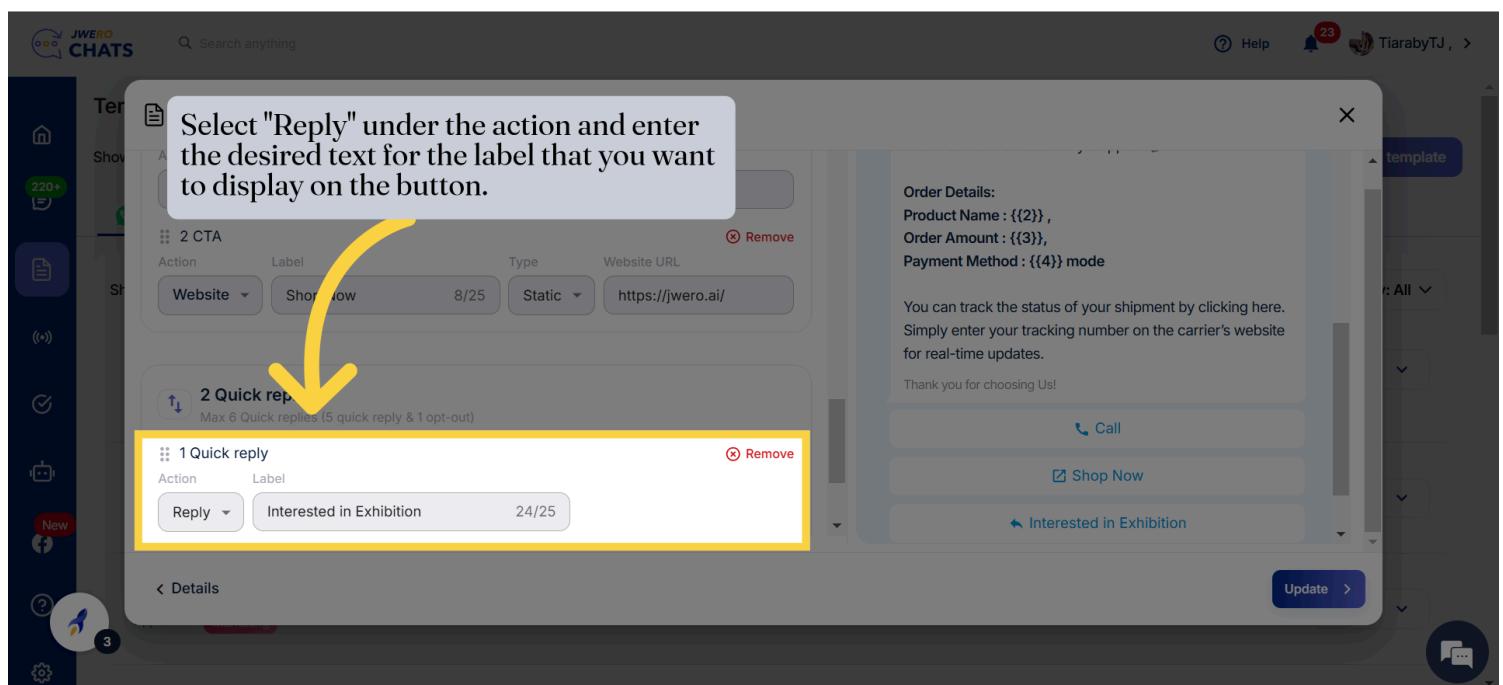
This screenshot is similar to the previous one, showing the 'Create new template' screen. It highlights the 'Website CTA' configuration with a yellow box and arrow. The preview window on the right shows the final appearance of the 'Shop Now' button, which is now clearly visible and highlighted by a yellow box and arrow.

35. Quick Reply CTA allows users to instantly respond with predefined options. For adding the "Quick Reply" button, click on "Add Quick reply".

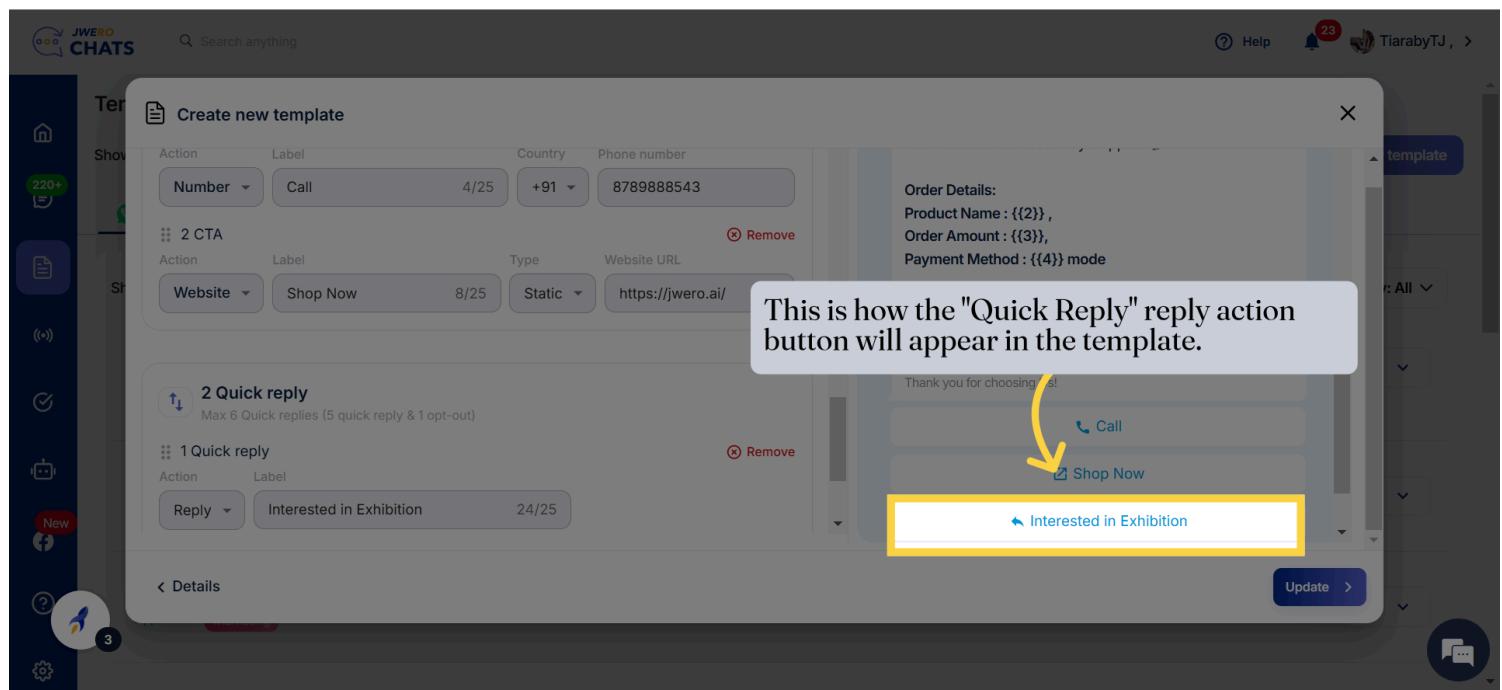
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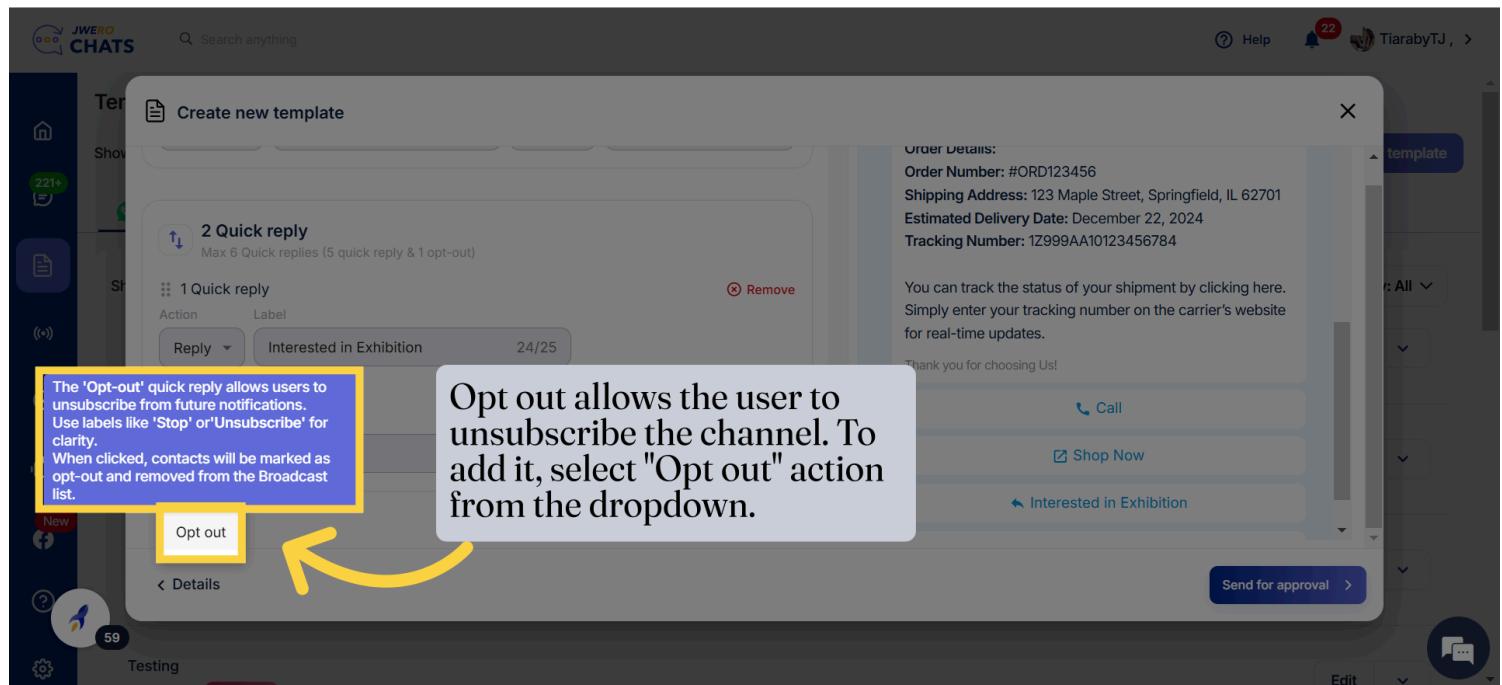
36. Quick Reply



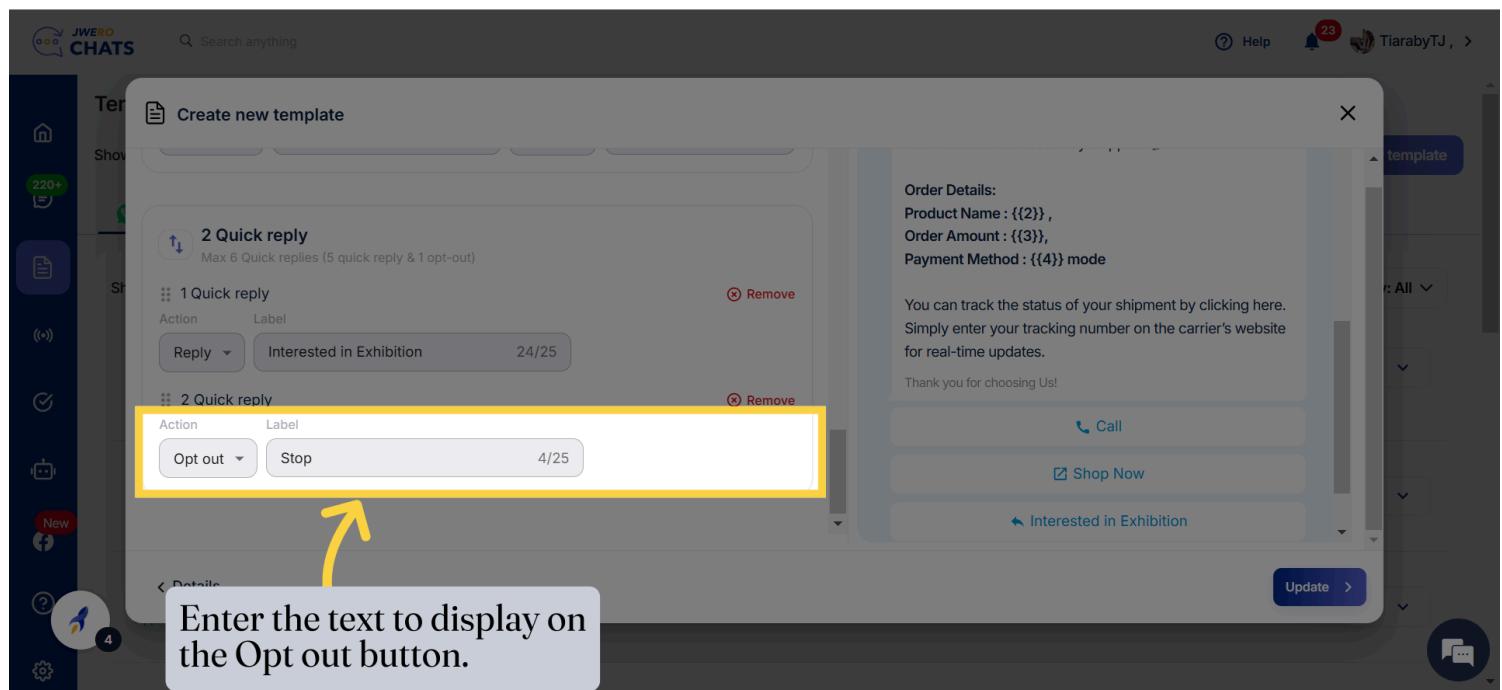
37. This is how the Quick Reply button will look like.



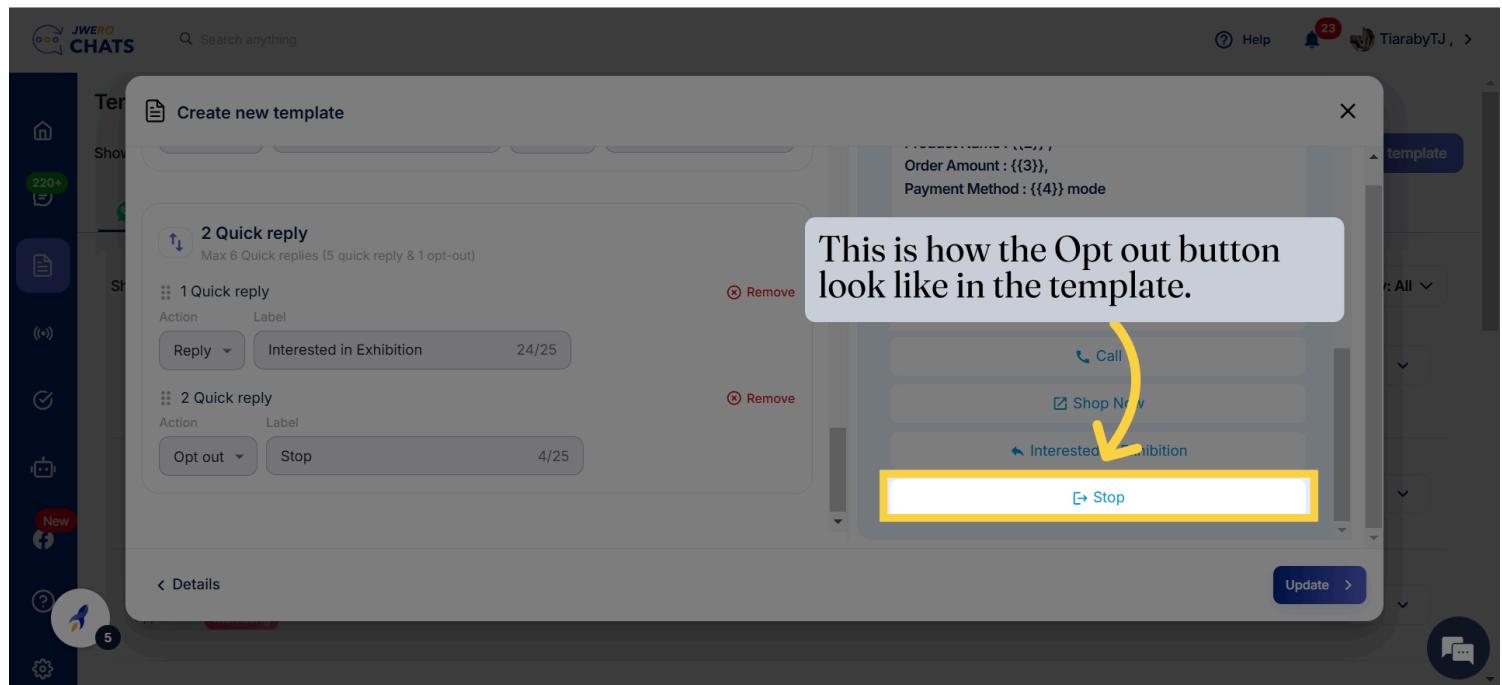
38. Opt out allows the user to unsubscribe the channel. To add it, select "Opt out" action from the dropdown.



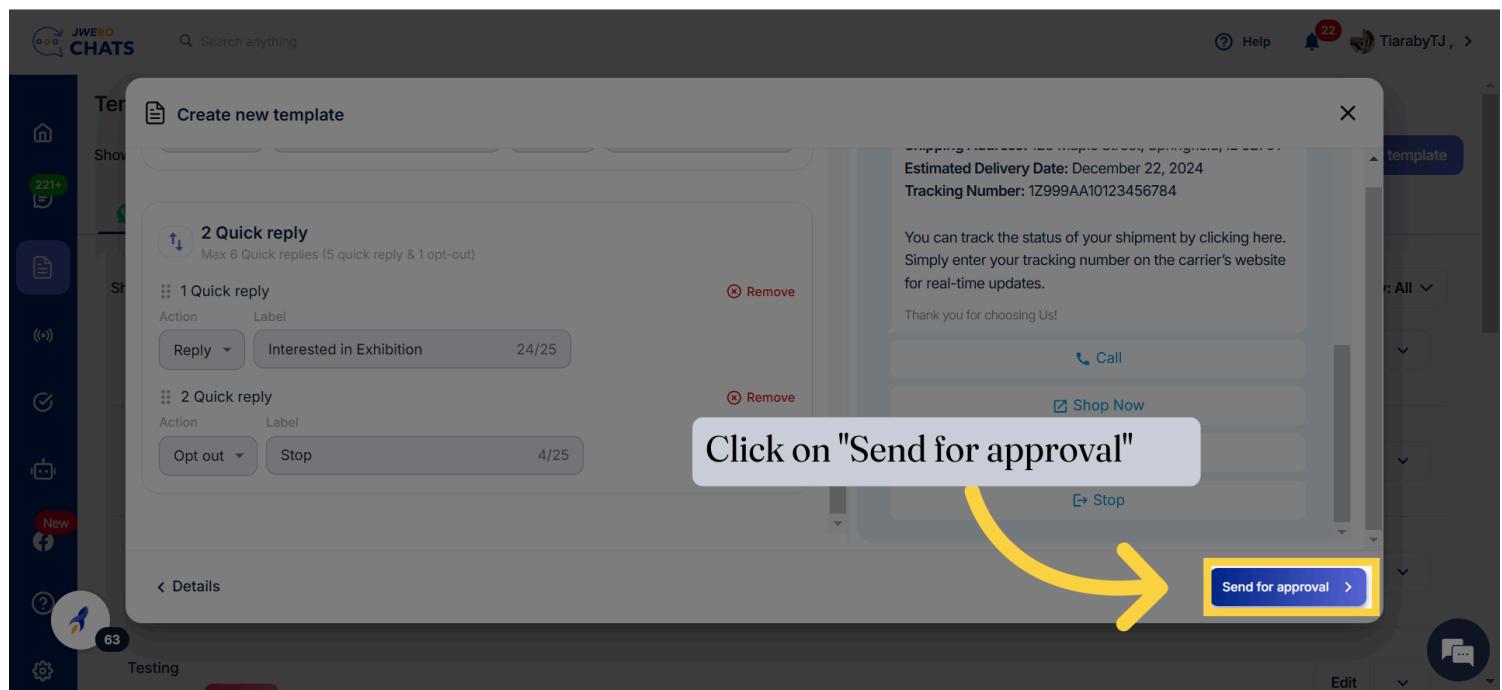
39. Opt Out Details



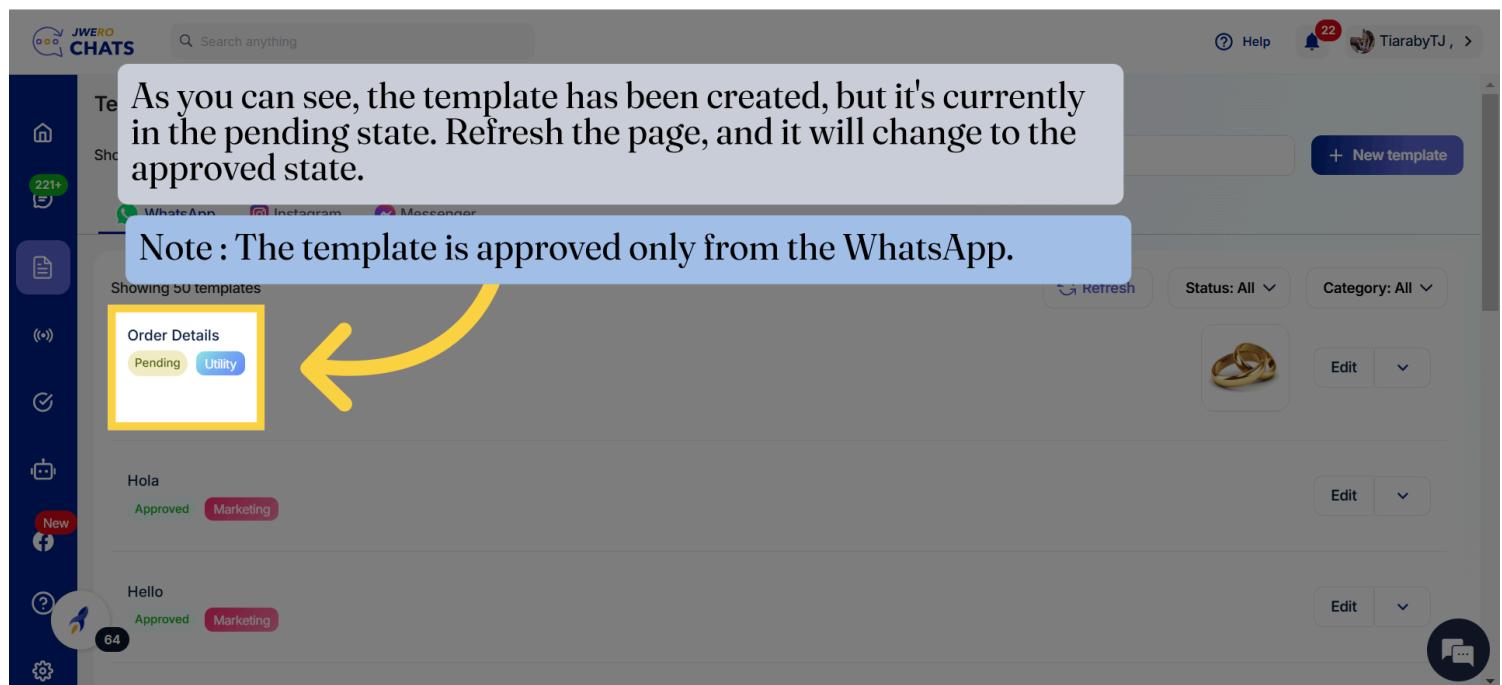
40. This is how the Opt Out button will look like.



41. Click on "Send for approval"



42. As you can see, the template has been created, but it's currently in the pending state. Refresh the page, and it will change to the approved state.



43. The status has been changed to "Approved" after refreshing the page.

Screenshot of the JWERO CHATS platform interface showing the 'Templates' section.

The top navigation bar includes the JWERO CHATS logo, a search bar, help and support links, and a user profile for TiarabyTJ.

The left sidebar contains various icons for different features like Home, Templates, WhatsApp, Instagram, Messenger, and more.

The main content area shows a list of templates:

- Order Details**: Status is **Approved** (green button).
- Hola**: Status is **Approved** (green button).

Below the list, a message box states: "The status has been changed to 'Approved' after refreshing the page." A yellow arrow points from this message to the "Approved" status button for the "Order Details" template.

A green callout box at the bottom right says: "Now you're ready to send the template message."