

Automatic Whatsapp Template from Jwero



^ Table of contents

▸ Automatic Messages via Whatsapp

▸ Benefits of Automatic Messages:

▸ How to Enable/Set Up Automatic Messages

- 1. Go to Integrations
- 2. Click on Meta
- 3. Click on Settings
- 4. Click on Assign Templates
- 5. Click on Birthday
- 6. Click on birthday
- 7. Click on Anniversary
- 8. Click on Assign

-   Birthday and Anniversary Templates will only get triggered when Customer's Birthdate and anniversary Date is Mentioned or added in CRM.

▸ Automatic Template is Set Up, But how will it get triggered lets understand ?

- 9. Click on CRM to Add the Birthday and Anniversary Date of a Customer
- 10. Click on Any Customer in CRM.
- 11. Add Birthday or Anniversary.
- 12. Add the Birthday Date
- 13. Add Anniversary Date.
- [14. Click on Update](#)

▸ Now that the Birthday and Anniversary Dates are Mentioned, the Automatic Templates will be triggered to the customer automatically.

Automatic Messages via Whatsapp

Tired of manually sending Birthday, anniversary or payment reminders on Whatsapp?

Now you can make it easier with automatic messages!

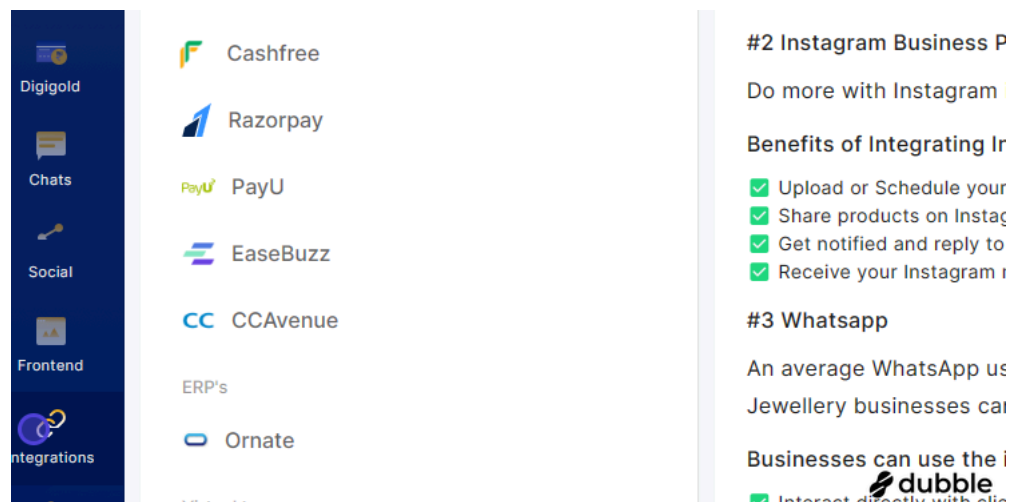
You set it up once and the Jwero will send messages such as Birthday, Anniversary, Order Update, Order Note, and Digigold Reminders, on your brand's behalf.

Benefits of Automatic Messages:

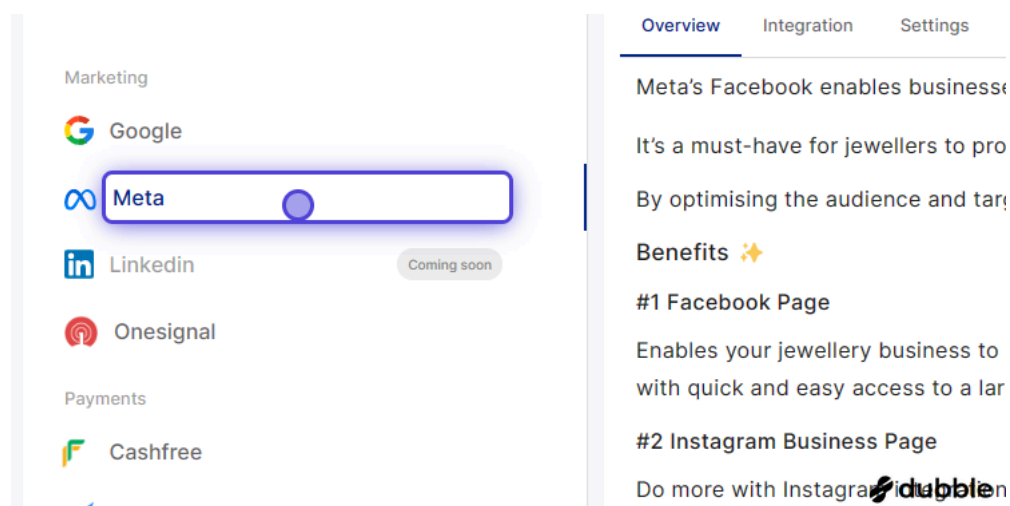
- **Saves time and effort** : Automatic messages allows you to set up a message once and the Jwero will send it out to your CRM Contacts automatically.
- **Customized Templates** : With Jwero Templates can be Jewellers can changes the messages templates and assign it for auto-trigger as per their choice.
- **Increases Efficiency**: As the manual work is reduced you can focus more brand building and customer engagement.
- **Special offer**: By using automatic Templates you can send Unique Personalized coupon Codes for customers to purchase of their special occasions such as birthday and anniversary.

How to Enable/Set Up Automatic Messages

1. Go to Integrations

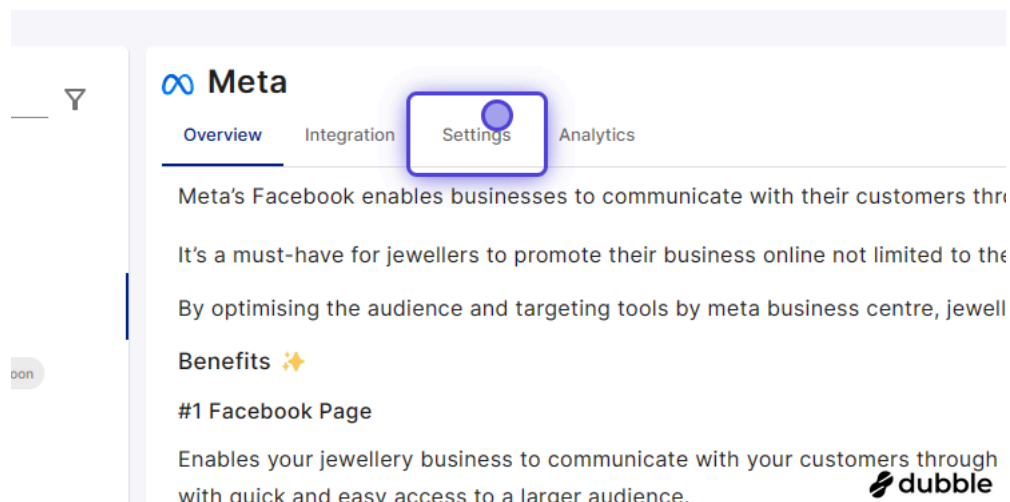


2. Click on Meta



3. Click on Settings

Here you will see and option called assign Templates.



4. Click on Assign Templates

Under This option Multiple options are enabled using which you can set Set Templates which will be triggered on set actions.

Ex. Birthday Template will get sent automatically to the customers on their Birthday.

Update

WhatsApp Templates

Whatsapp Templates

Whatsapp template messages are pre-written and pre-approved messages created in advance which can be sent repeatedly to your customers by your business.

WhatsApp Bot Setting

Whatsapp Bot Setting

Whatsapp Bot allows you to Manage and Automate your daily communications with your customers with the help of pre-set options.

Automatic Templates

Assign Templates

Assign an existing template or a template that is customised for each event so that you may provide your consumers a personalised experience.



5. Click on Birthday

To Assign a Template for Birthday > from Dropdown > Select which approved message you would like to send customers on the set labels.

Meta

Overview Integration Settings Analytics

Facebook

Tanika Test

Category: Business service

Update

Coming

Assign automatic templates

Birthday

birthday

Anniversary

offer_test_template

Cancel Assign

Whatsapp template messages are pre-written and pre-approved messages created in advance which can be sent repeatedly to your customers by your business.

WhatsApp Bot Setting

Whatsapp Bot Setting

Whatsapp Bot allows you to Manage and Automate your daily communications with your customers with the help of pre-set options.

dubble

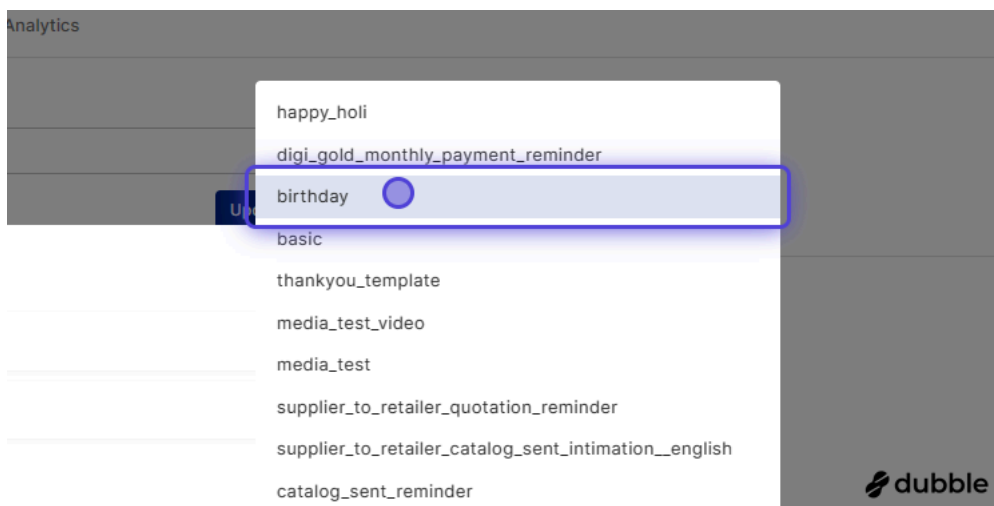
6. Click on birthday

All the approved Templates created by your brand will be visible here.

If no template is available, then Create a Template and submit it for approval to Meta from Jwero.

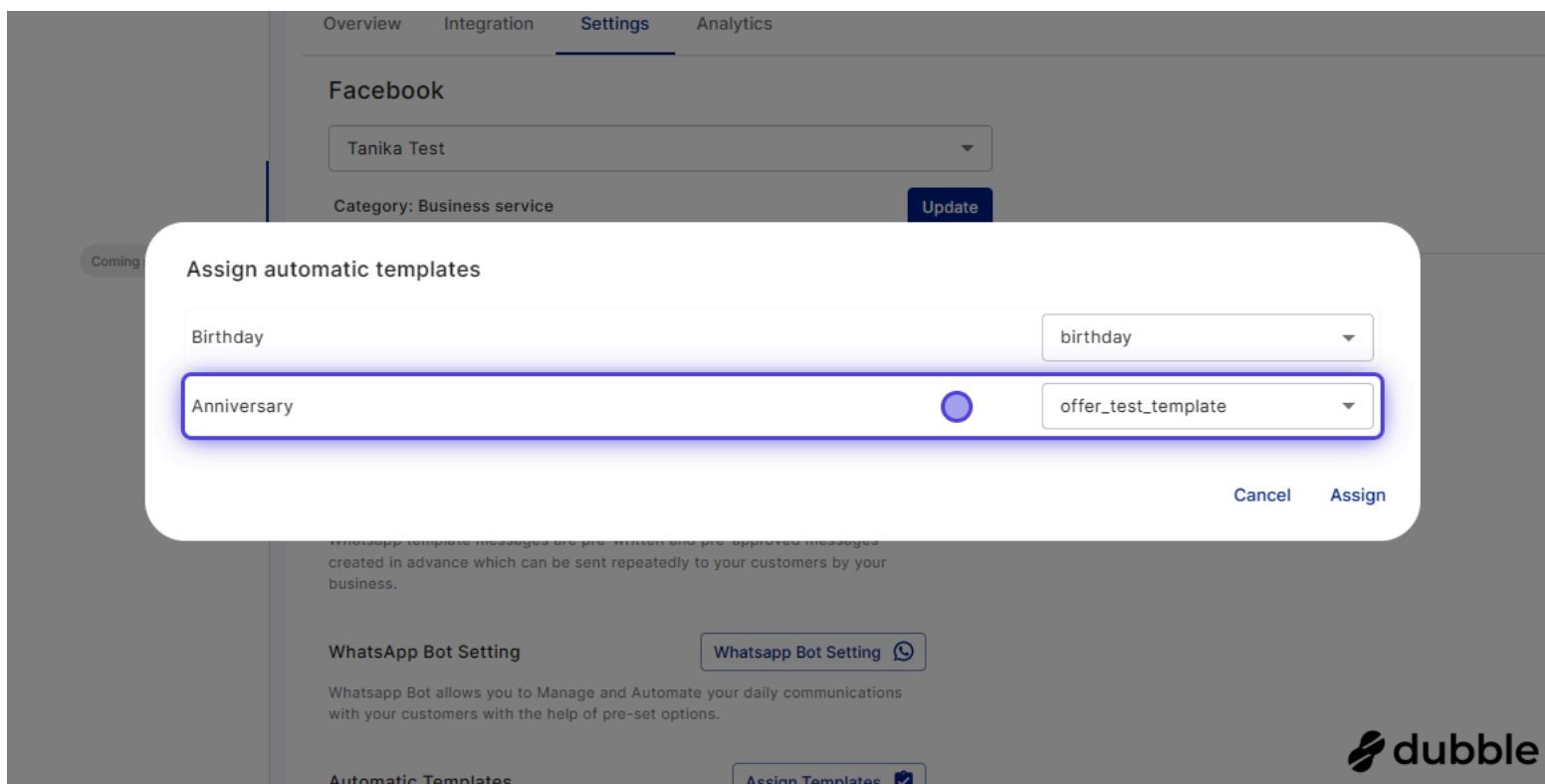
Once Approved it will be enabled in the dropdown.

You can change the templates anytime from the dropdown.



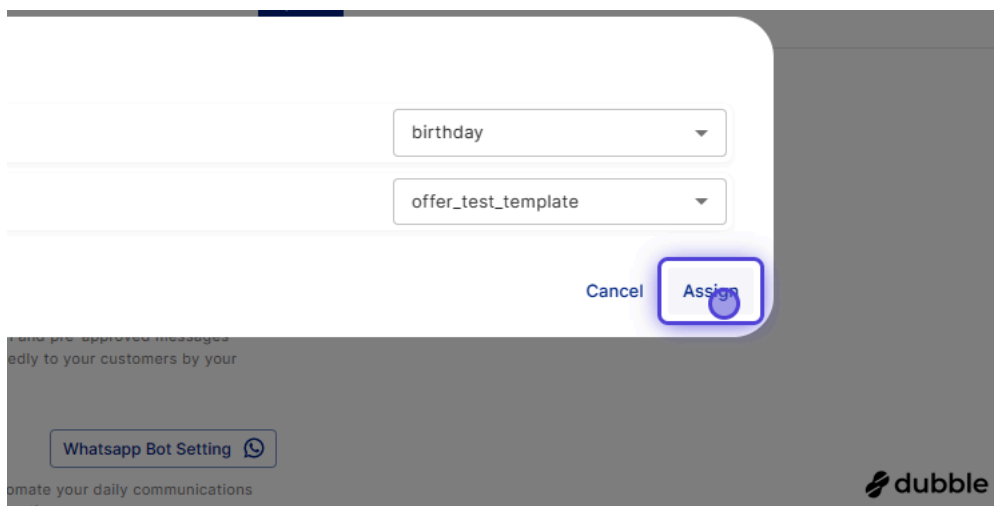
7. Click on Anniversary

Just Like Birthday, automatic Template can be set for Anniversary too!



8. Click on Assign

Once Template is Set Up, Select Assign and it is ready to be triggered.

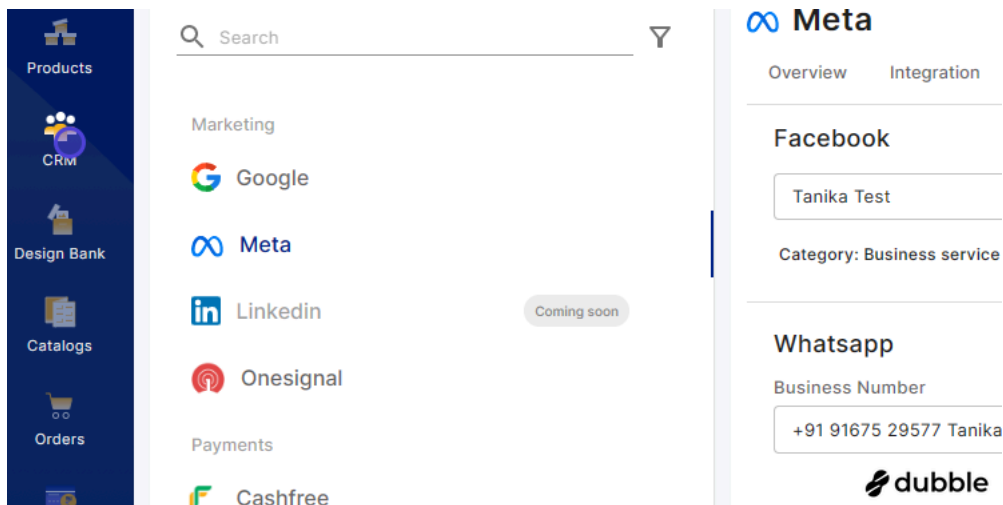


💡 **Birthday and Anniversary Templates will only get triggered when Customer's Birthdate and anniversary Date is Mentioned or added in CRM.**

Automatic Template is Set Up, But how will it get triggered lets understand ?

💡 For The templates to be send automatically on customers birthday or anniversary,we need to ensure customers birthday and anniversary date is added.

9. Click on CRM to Add the Birthday and Anniversary Date of a Customer



10. Click on Any Customer in CRM.

On the Rlght > Under Personal Info > Add Birthday and Anniversary Date..

Dashboard

Products

CRM

Design Bank

Catalogs

Orders

Digigold

Chats

Social

Search

Sync

Add

Filter

AP

Akshay p

HR

himanshu Ramani

#P

#Akshay P

TJ

Tanishk jain

JA

Jwero AI AI

BB

Barryheaky Barryheaky

Akshay 33 Pagare

Kaio Tanika

Akshay p

Add Tag

Profile

Sessions

Notes

Account Info

First Name

Akshay

Email

Mobile

+91

8097534684

Team Member

Personal Info

Birthday

dubble

11. Add Birthday or Anniversary.

You can add Dates via:

1. Manually by Jeweller.
2. In Bulk via Google Sheets from CRM,
3. Using InStore App.

Profile

Sessions

Notes

Personal Info

Birthday

mm/dd/yyyy

Anniversary

mm/dd/yyyy

Annual Income

Gender

Profession

Ethnicity

dubble

12. Add the Birthday Date

Personal Info

Birthday

mm/dd/yyyy

Gender

Anniversary

February 2023

mm/dd/yyyy

Profession

Annual Income

Ethnicity

Language

Religion

* This information



13. Add Anniversary Date.

Annual Income

February 2023

Language

* This information

Address Info

Address Line 1

Building A

City

Ethnicity

Religion

Address

Road



14. Click on Update

Update

Last Name

p

Nickname

Akshay

WhatsApp



Now that the Birthday and Anniversary Dates are Mentioned, the Automatic Templates will be triggered to the customer automatically.