

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

Digigold

Cashfree

Razorpay

PayU

EaseBuzz

CCAvenue

ERP's

Ornate

Virtual try on

#2 Instagram Business P
Do more with Instagram
Benefits of Integrating Instagram
✓ Upload or Schedule your posts
✓ Share products on Instagram
✓ Get notified and reply to messages
✓ Receive your Instagram insights

#3 Whatsapp
An average WhatsApp user sends 20 messages per day
Jewellery businesses can use WhatsApp to communicate with customers
Businesses can use the dubble app to interact directly with clients

2. Click on Meta

Marketing

Google

Meta

Coming soon

LinkedIn

Onesignal

Payments

Cashfree

Analytics

Overview Integration Settings

Meta's Facebook enables businesses to communicate with their customers through Facebook and Instagram Business Pages

It's a must-have for jewellers to promote their business online not limited to the physical store

By optimising the audience and targeting tools by meta business centre, jewellery businesses can reach a larger audience

Benefits ✨

#1 Facebook Page

Enables your jewellery business to communicate with your customers through Facebook with quick and easy access to a larger audience

#2 Instagram Business Page

Do more with Instagram Business Page using the dubble app

3. Click on Settings

Here you will see an option called assign Templates.

Y

Meta

Overview Integration Settings Analytics

Meta's Facebook enables businesses to communicate with their customers through Facebook and Instagram Business Pages

It's a must-have for jewellers to promote their business online not limited to the physical store

By optimising the audience and targeting tools by meta business centre, jewellery businesses can reach a larger audience

Benefits ✨

#1 Facebook Page

Enables your jewellery business to communicate with your customers through Facebook with quick and easy access to a larger audience

dubble

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.



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 sent customers on the set labels.

Coming

Meta

Overview Integration **Settings** Analytics

Facebook

Tanika Test

Category: Business service Update

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

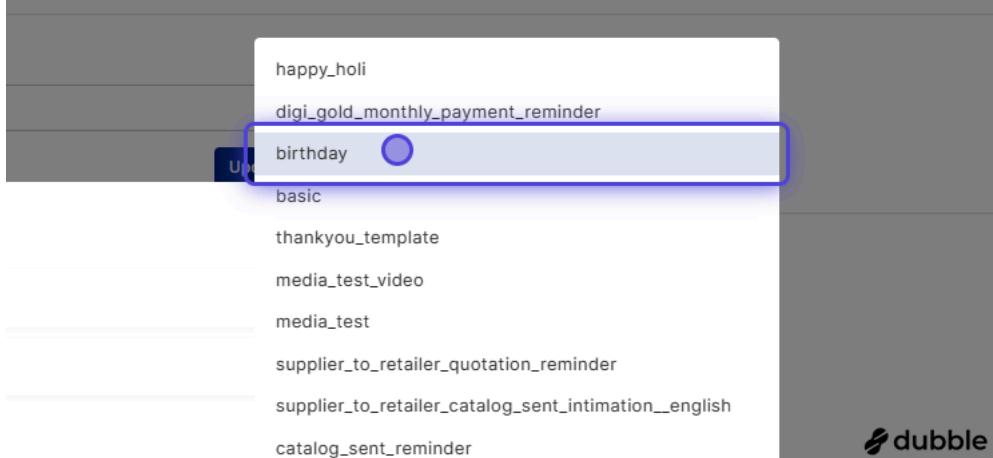
6. Click on birthday

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.



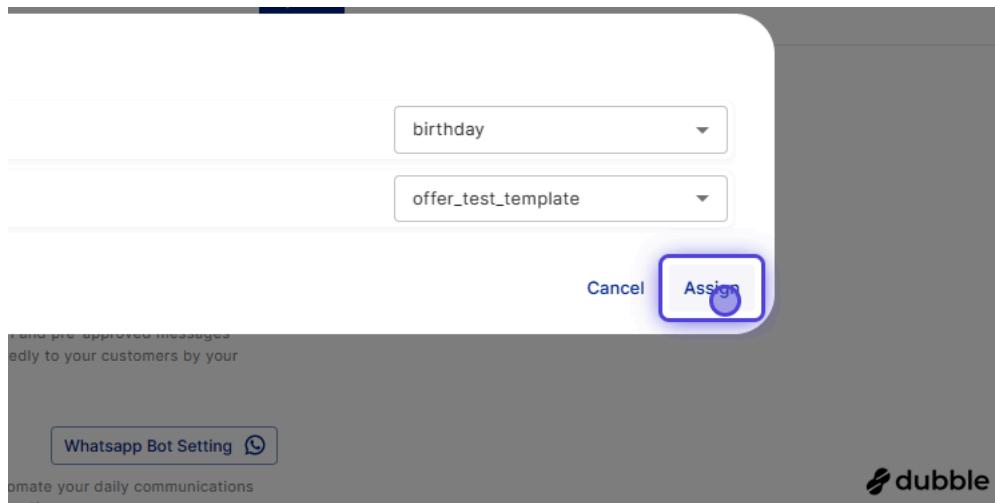
7. Click on Anniversary

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

The screenshot shows the 'Assign automatic templates' dialog on the Dubble platform. The 'Anniversary' template is selected and highlighted with a blue border. The 'offer_test_template' is assigned to it. The dialog also includes fields for 'Birthday' (selected) and 'birthday' (assigned). At the bottom, there are 'Cancel' and 'Assign' buttons. A note about WhatsApp templates is visible at the bottom left. The Dubble logo is in the bottom right.

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

Products

CRM

Design Bank

Catalogs

Orders

Search

Meta

Overview

Integration

Facebook

Tanika Test

Category: Business service

Whatsapp

Business Number

+91 91675 29577 Tanika

Google

LinkedIn

OneSignal

Payments

Cashfree

10. Click on Any Customer in CRM.

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

The screenshot shows the Jwero CRM application. On the left, there's a vertical sidebar with icons for Dashboard, Products, CRM, Design Bank, Catalogs, Orders, Digigold, Chats, and Social. The main area has a search bar at the top with options for Search, Sync, Add, and Filter. Below the search bar is a list of contacts. One contact, "Akshay p", is highlighted with a blue border. The contact card for "Akshay p" shows the name, a small profile picture, and some status indicators (yellow dot, green dot, blue dot). To the right of the contact list is a detailed profile view for "Akshay p". The profile tab is selected, showing "Account Info" with fields for First Name (Akshay), Email (empty), Mobile (+91 8097534684), and Team Member (empty). Below that is the "Personal Info" section, which includes fields for Birthday (empty), Gender (empty), Anniversary (empty), Profession (empty), Annual Income (empty), and Ethnicity (empty). The "dubble" logo is visible in the bottom right corner.

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.

This screenshot shows the "Personal Info" section of the Jwero CRM profile for "Akshay p". The "Birthday" field is highlighted with a blue border. It contains the placeholder text "mm/dd/yyyy" and has a calendar icon to its right. Other fields in the section include "Gender" (empty), "Anniversary" (empty), "Profession" (empty), "Annual Income" (empty), "Ethnicity" (empty), and a dropdown menu. The "dubble" logo is visible in the bottom right corner.

12. Add the Birthday Date

Personal Info

Birthday

Gender



Anniversary

February 2023



Annual Income

Profession



Language

Ethnicity



* This information

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

Religion



dubble

13. Add Anniversary Date.

Annual Income

February 2023

▼



Ethnicity



Language

February 2023

▼



Religion



* This information

February 2023

▼



Address Info

Address Line 1

Address



City

Road



dubble

14. Click on Update

Update

Last Name

Nickname

WhatsApp

dubble

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