



GUPSHUP'S WHATSAPP MANUAL

Message Templates: Creation, Best Practices and FAQs

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Introduction

With 2 billion WhatsApp users around the globe, and its availability in 180 countries and 60 different languages, it is a widely used app for communication. Given its wide reach, WhatsApp has an option for use in the business space i.e WhatsApp API which can ensure scalable and engaging conversations with customers.

The WhatsApp Business API can be leveraged two ways to send out messages namely:

1-way messaging or Push Notification messages- These are business-initiated messages which are delivered to the end user provided the user has opted in. These messages are trigger based and sent using Gupshup's Single API.

2-way messaging- These are session messages which a business can send to a user if the conversation is user initiated. A session lasts for 24 hours from the last message sent by the user to the business.

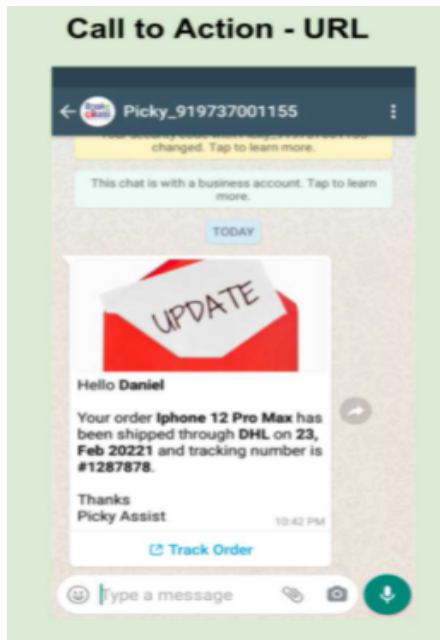
Types of Message Templates

The WhatsApp Business API allows enterprises to send multiple types of notification messages. All message templates are reviewed by WhatsApp for approval. :

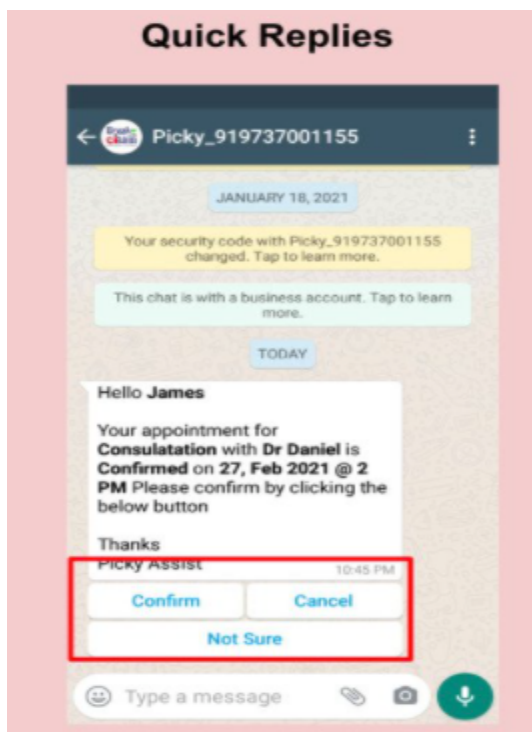
1. **Text Message:** Text message templates are message formats for common reusable notifications a business may want to send.
2. **Media messages:** Send Images/Documents/PDF using the media message templates.
3. **Interactive Buttons:** Send interactive button elements like the CTA button and Quick Replies to capture user input or redirect them outside the WhatsApp Interface.

There are two types of predefined buttons-

- ☐ **Call-to-Action** — With the help of Call to Action (CTA) button businesses can redirect the user to a URL.



- ☐ **Quick Reply** — It allows end-users to simply tap on one of the reply options provided and submit their response.



WhatsApp's Templates Approval Policy

1. **Transactional Templates:** Templates should be purely transactional in nature. WhatsApp does not allow marketing or promotional content to be sent out to the end user. The WhatsApp team uses automation as well as manual review to review these templates and is fairly strict about their policies. Types of transactional templates are:
 - a. **User requested Message:** A user requested message means that the user has asked or requested for the information sent to them.
Eg: Hi {{1}}! Thanks for starting your personal training plan. We'll send you a {{2}} update with your new schedule. You can log in online using your training ID {{3}}. Stay fit!
 - b. **Follow-up message:** A follow-up message template will be approved if the business is following up on a previous conversation made to the customer.
Eg: "I'm sorry that I wasn't able to respond to your concerns yesterday but I'm happy to assist you now. If you'd like to continue this discussion, please reply with 'yes'"

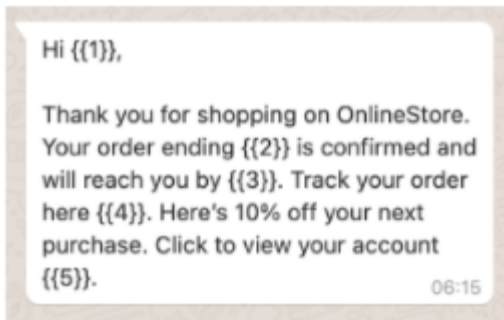
WhatsApp's Template Guidelines

1. **Promotional:** WhatsApp follows a strict non-promotional message policy while reviewing the template. Make sure the templates do not contain any content that pertains to advertising or promotion.

Messages that WhatsApp Considers Promotional :

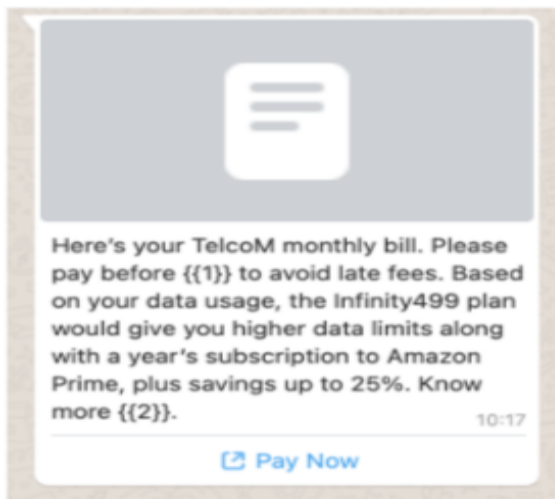
- **Coupon Code, Discount, Gift**
Eg: "Here is your boarding pass, with seat assignment and gate information. If you would like to save 10% on your in-flight dinner, order your meal through our app."
Another example is about a sale discount-

✗ Sales discount in message text

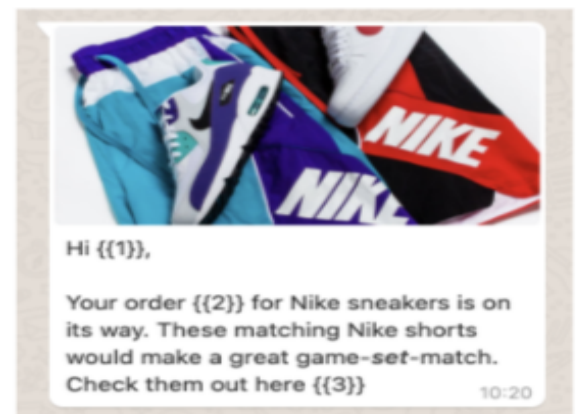


- Upsell Offers-Cross-sell Recommendations

✗ Up-sell offer



✗ Cross-sell recommendation

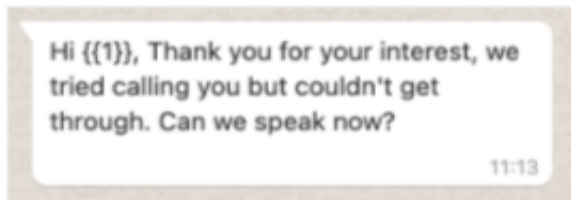


- Cold Call Messages

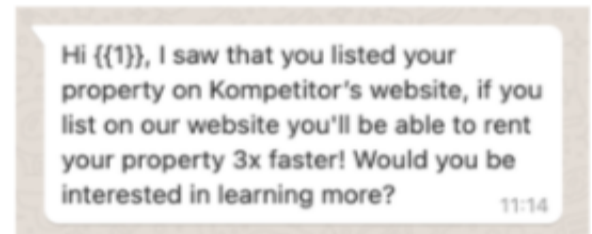
Messages like cold calling or just trying to engage the user by push marketing.

Eg: "Is now a good time to talk?", "Thank you for your interest, can we speak now?", "I tried contacting you but you weren't available. When are you free?", etc.

✗ Cold-call

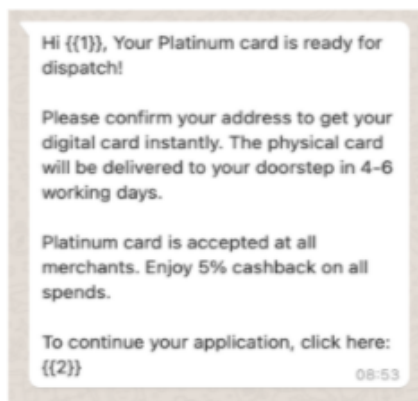


✗ Cold-call

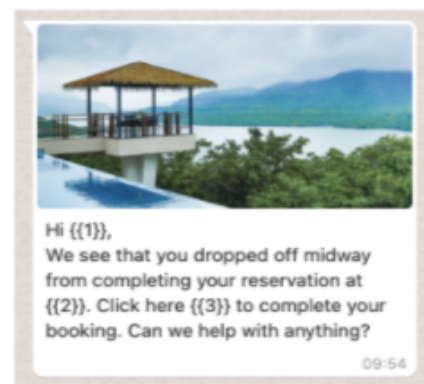



- **Re-engagement of drop leads** or asking the users to 'do something' e.g. complete a purchase will be straight away rejected.

✗ Asking user to 'do something' to complete sale/purchase

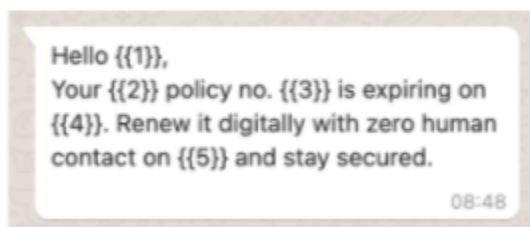


✗ Re-engaging a dropped lead



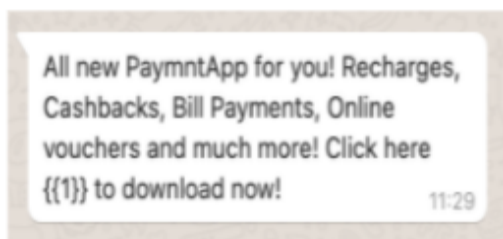
 Please Note-A reminder to an existing customer about the expiry of his/her policy followed by a call to renew the same does not fall under the category of re-engagement.

✓ Acceptable as it's a reminder to an existing customer

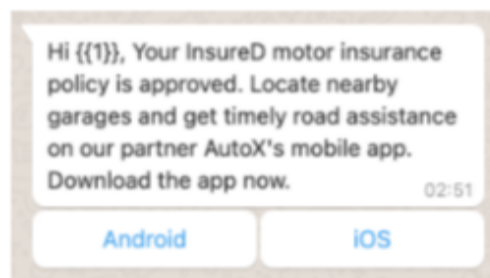



- **Incentivize users to download** partner apps or new apps.

✗ New App promotion



✗ Partner App promotion

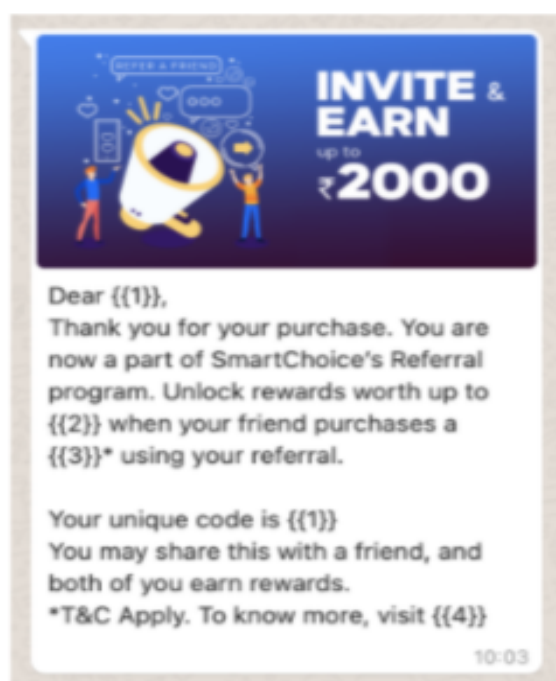



 Please note- Messages that drive users to download the business's app do not fall under this category.

- **Referral and Loyalty program**

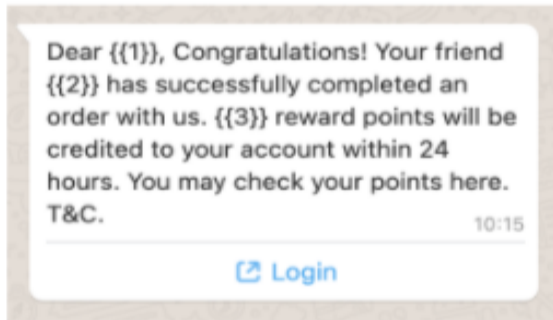
Messages about promoting a Referral or Loyalty Program. E.g

✗ Referral program promotion



 Please note- Messages that are transactional updates of Loyalty or Referral programs where the member is awaiting such message do not fall under this category. E.g-

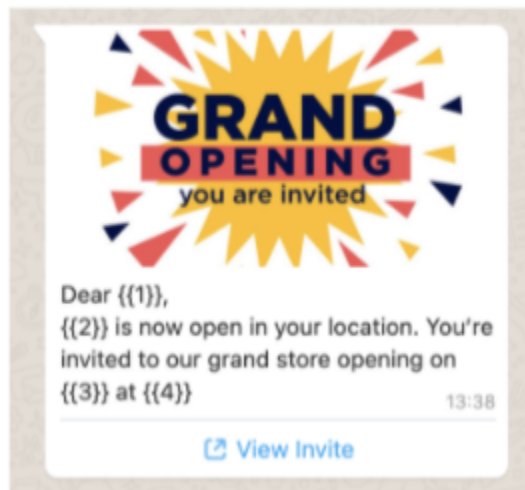
✓ Acceptable as it's a transactional update for the referral program




- **Festival Wishes & Greetings**

Messages that the customer is not expecting or indirectly trying to sell or promote a new product or business.

✗ New store opening announcement to promote sales



 Please Note- Service-related messages that are necessary to maintain the customer's account e.g **security alert**, **scheduled IT maintenance**, etc or **simple greetings with no CTA** do not fall under this category.

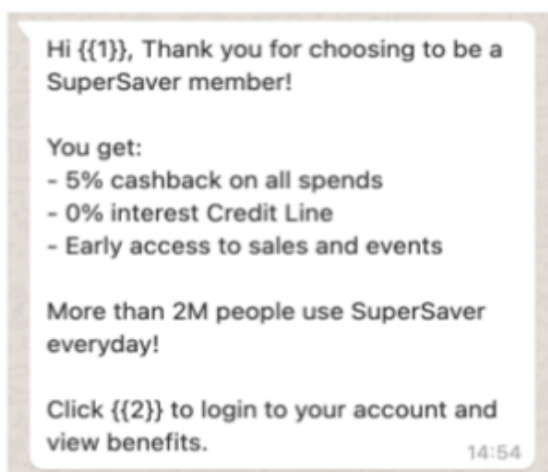
✓ Acceptable as it's not trying to promote the business / sales



★ **Keep a check on words and phrases used**

Sentence framing and verbiage play an important role in getting the template approved. As there isn't any exclusive rundown of words that one should avoid while framing the sentence there exist a lot of grey areas that can get a template approved by the way the words are placed.

✗ List of benefits like 0% interest and the sentence on 'More than 2M people...' make it promotional

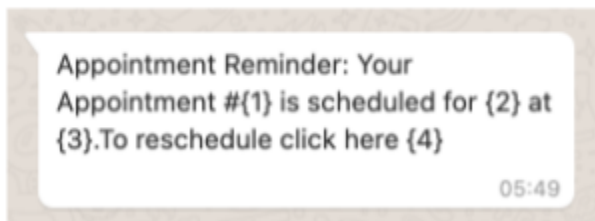


The above example shows that despite a clear intent of not sounding promotional this template stands a chance to get rejected due to listing out benefits, service advocacy ‘ More than 2M people use Super Saver every day!’

💡 It is a good practice to read out loud the template and see if it sounds promotional or informative.

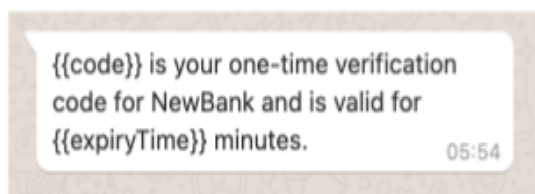
2. **Template Formatting:** Make sure the parameters are used correctly e.g. {{(1)}, {(2)}} and that they have the correct number of curly brackets i.e 2 on the left side of the number and 2 on the right side. It is important to keep in mind what goes in the variable parameter.

✗ Parameters only have one curly bracket on either side



- **Numeric Parameters-** Make sure the parameters use numerals instead of text e.g {{(code)}} would be incorrect.

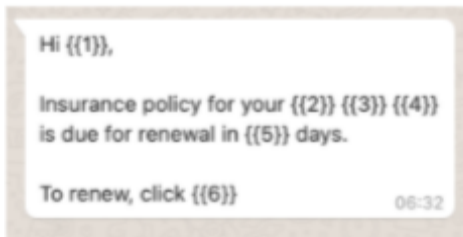
✗ Text instead of numerals to denote parameters



Usually happens due to a copy-paste error

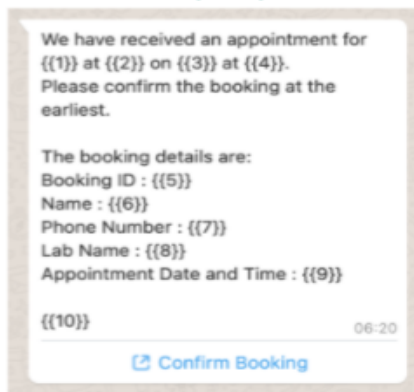
- **Floating Parameter**
Make sure there are no floating parameters i.e parameter with an unknown purpose. Example include
 - ❖ Multiple consecutive parameters {{(1)}, {(2)}, {(3)}, {(4)}}

✗ Multiple consecutive parameters with unknown values



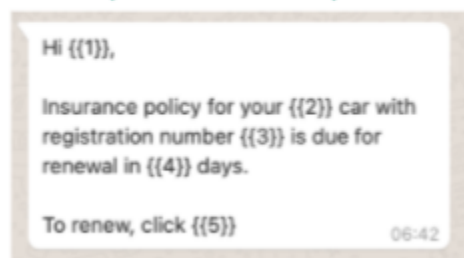
❖ Single parameter with no context around it

✗ Here, {{10}} is a floating parameter and no sample is provided



💡 It is good practice to map a sample value to a variable parameter and give enough context to each parameter to help the reviewer know what values it may contain. Also, this makes the **template reusable**.

✓ Acceptable as sufficient context is provided for each parameter



- **Language-** WhatsApp Supports a wide range of language templates that can be submitted. Ensure that your content is in a [supported language](#).

Translation: WhatsApp will not do any translations for your business. All message template translations must be entered by you individually for all templates in the same format following the same policies.

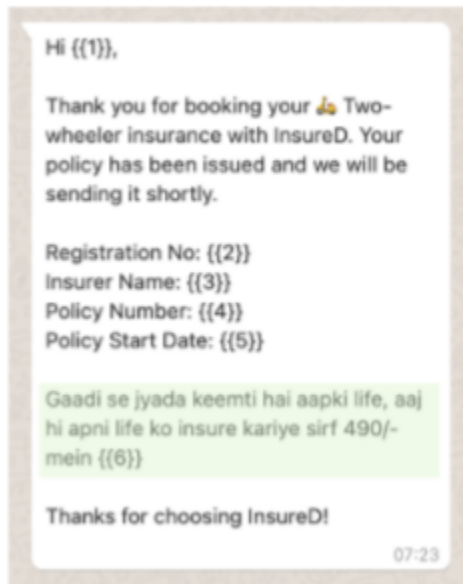
❖ The language selected should match the content.

✗ Language selected is 'English' but message is in Spanish



- ❖ Do not mix languages (e.g. “Hinglish” or “Spanglish”)

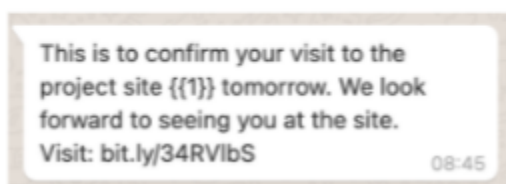
✗ Hindi content* using Roman script in an English template



- **URLs**

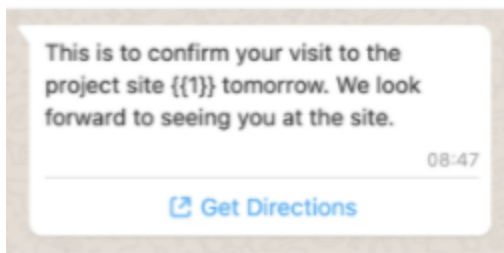
- ❖ Refrain from using URL shorteners for your links (e.g., bit.ly, tinyurl, or goo.gl) because they obscure the intended link destination.

✗ Use of a link created with a URL shortener



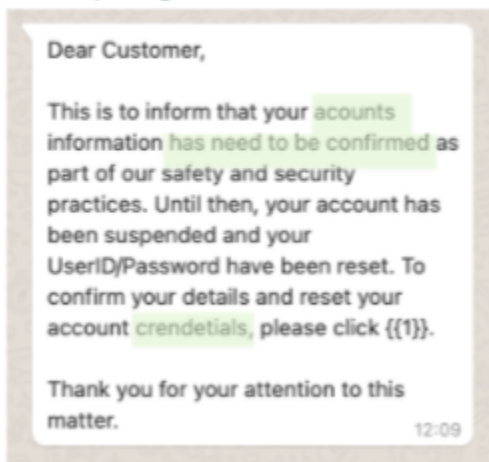
- ❖ The URL domain in your links should belong to your business.

✓ Acceptable as long as the link behind the CTA button belongs to the business



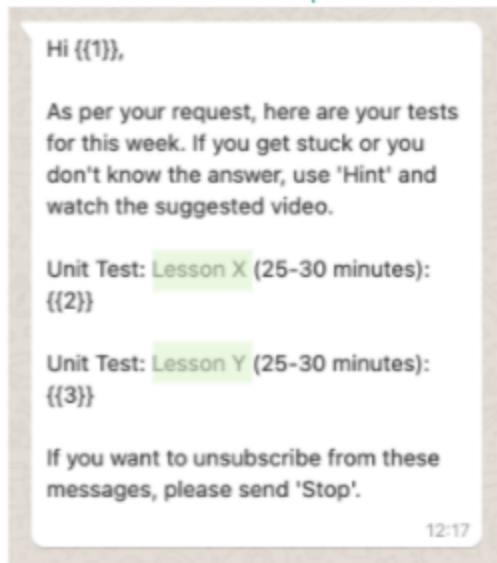
- **Grammar & Spelling-** User Experience is of utmost importance to WhatsApp. Their policies essentially revolve around how it would be perceived by a user and what would be the outcome. Messages with misspellings or grammatical errors may prompt customers to view this message as spam or a hoax.
- ❖ Proofread your content for spelling and grammar before submitting it for review.

✗ Egregious grammar and spelling mistakes



- ❖ When submitting a test template, make sure to use the correct format

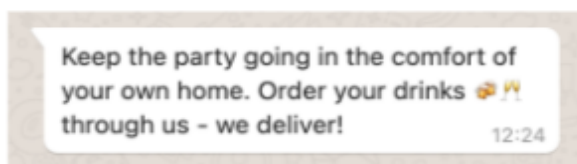
✗ 'Lesson X' and Y clearly should have been variable parameters



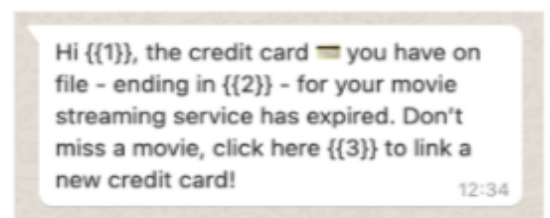
3. Policy Violations

- **Commercial Policy**- When you offer goods or services for sale, WhatsApp considers all messages and media related to your goods or services, including any descriptions, prices, fees, taxes and/or any required legal disclosures, to constitute transactions. Transactions must comply with the WhatsApp Commerce Policy.

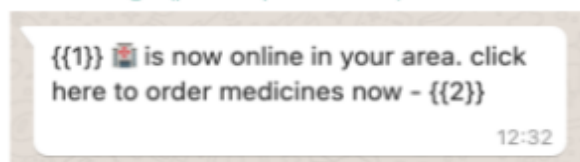
✗ Promotes sale of alcohol



✗ Promotes sale of digital content and digital subscriptions

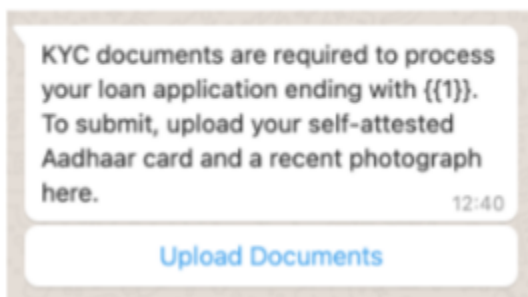


✗ Promotes sale of medicines i.e. drugs (prescription et al.)



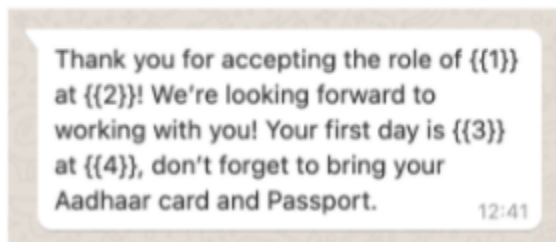
- **Business Policy**- Do not send messages that contain content that violates WhatsApp's Business Policy.
- ❖ Do not request sensitive identifiers from users. For example, do not ask people to share full length **individual payment card numbers, financial account numbers, National Identification numbers, or other sensitive identifiers**. This also includes not requesting documents from users that might contain sensitive identifiers.

✗ Asks user to upload documents containing sensitive identifiers e.g. Aadhaar card in India, on WhatsApp



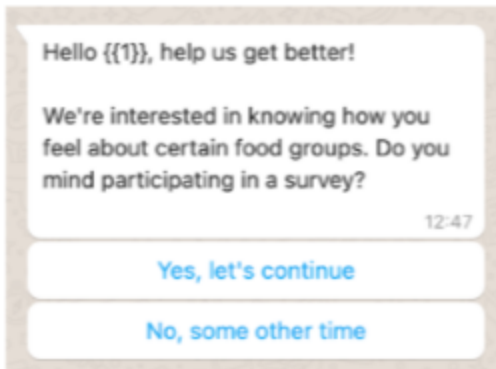
📝 Please Note-If the message is a reminder or informing the end-user to bring along sensitive identifiers like Aadhar Card, Pan Card, etc the template will be approved. Eg.

✓ Acceptable as the user is not asked to share sensitive information on WhatsApp



- ❖ Don't use any data obtained about a person you message within WhatsApp for any purpose other than as reasonably necessary to support messaging with that person.

✗ Survey to collect user preferences or data




Hello {{1}}, help us get better!

We're interested in knowing how you feel about certain food groups. Do you mind participating in a survey?

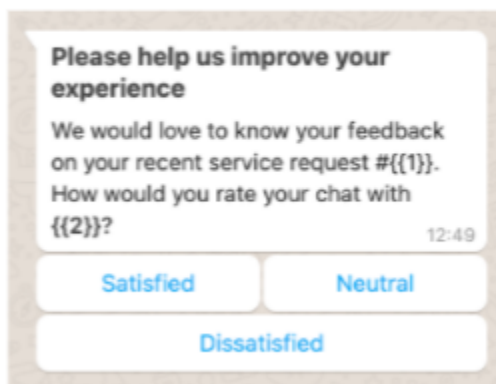
12:47

Yes, let's continue

No, some other time

 Please Note-A survey after a service experience is fine, but do not submit a survey or poll to collect data from users.

✓ Acceptable as it's a survey to collect feedback after a service experience on WhatsApp



Please help us improve your experience

We would love to know your feedback on your recent service request #{{1}}. How would you rate your chat with {{2}}?

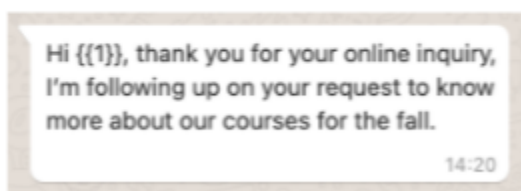
12:49

Satisfied Neutral

Dissatisfied

- ❖ You may only initiate chats if you are sending a transactional notification. Non-transactional messages will be rejected.

✓ Acceptable as it's a follow-up message to the user's inquiry

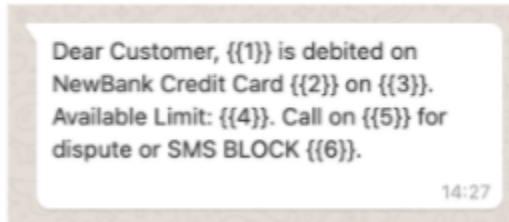


Hi {{1}}, thank you for your online inquiry, I'm following up on your request to know more about our courses for the fall.

14:20

- ❖ Personalize your messages and make it clear that your customers have requested to hear back from you.

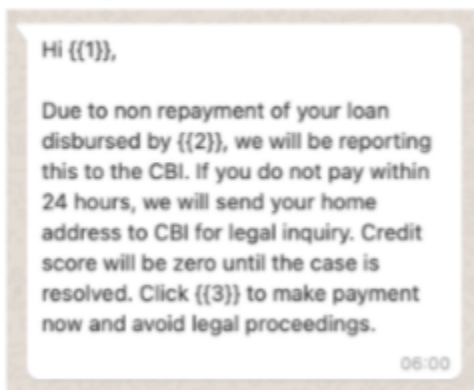
✓ Acceptable as it's a transactional update that the user is expecting



3. Threatening Messages: WhatsApp Policies do not permit threatening and offensive message notifications to end consumers. WhatsApp considers the below message types as a threat:

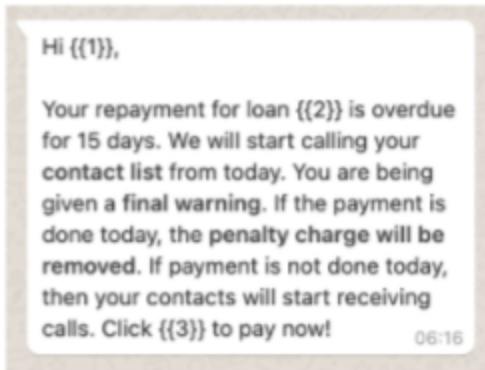
- ❖ Message templates that threaten customers with a legal course of action will be rejected: WhatsApp cannot be used to inform, update, serve a legal notice or threaten to serve a notice to the end consumer.

✗ Threat of legal action and exposure of personal information



- ❖ Message templates that threaten to add customers to a WhatsApp group with their friends and family to shame them if they don't pay would be rejected as well.

✗ Threat of social shame by calling up user's contacts



- ❖ **Debt Collection:** The WhatsApp Business policy does not permit companies that specialize in debt collection. Additionally, message templates that would read on the lines of 'pay your debt or else...' would be rejected as well.
Eg: Please find the Payment Reminder Notice being issued to you with regards to outstanding dues arising out of Credit Services availed by you.

WhatsApp's Template Best Practices and Guidelines

1. **Message Template Name:** Element name or the name given to the message template is the first point of the review to WhatsApp. WhatsApp uses a combination of automation and manual review to approve any message template hence it's imperative to consider that someone outside the business would be conducting the review.
Make your message template name clear. Instead of using a name like "template_014," use "bus_ticket_details".
2. As someone outside of your business will be reviewing your message templates providing more clarity gives reviewers context around how the message template will be used. Add a sample when submitting a template, wherever possible.
3. All **appeals** for rejected message templates require a sample. You can appeal a rejected message template through Direct Support.
4. When a business wants to have the same template content in various languages, create the template under one template name and include all the various languages in a single submission.

5. If you need a message template to **reopen the 24-hour window**, we suggest starting with some mention of the previous conversation thread.
Example: I was able to do some follow-ups based on our previous conversation, and I've found the answer to your question about our refund policy. If you'd like to continue our conversation, please say 'yes'.
6. Delete templates you don't plan to use. There's a limit of **250 templates per WABA**. To request an increase in the template limit, you may raise a Direct Support ticket but you will need to provide a strong business justification.
7. Parameter values can't have newline characters. To display multiple options like a list and if the number of options varies by customer (e.g. travel quotes, items in an order), create as many templates as there are options. Or create one template with a **Quick Reply button "Show More"**.
8. Create templates **1:1 in nature** for a personalized experience.
9. Avoid acronyms

For more information or help please write to whatsappsupport@gupshup