

Step 1: Set Up WATI Account

You guide them:

1. Go to <https://app.wati.io/>
2. Click on “**Sign Up**”.
3. Use your **business email ID** to register.
4. Verify your email and log in.

This step will help you to register in the WATI platform and access the Dashboard where messages, Integration, contacts , chatbox, webhooks and other functionalities are managed.

Step 2: Connect Their WhatsApp Business Number

You explain:

1. In WATI Dashboard, Click on contact number and connect your whatsapp business number.
2. Log in with the **Meta Business manager account** (Previously Facebook) to connect to the WhatsApp Business number and get approved.
3. Follow the Meta setup wizard to verify the business and phone number.

Step 3: Install WATI Shopify App

Steps

1. In the WATI Dashboard >>Click on more >> From the Dropdown >> Click on Integration
2. On the page there will be widgets for example Shopify, Whatsapp, facebook, Zendesk
3. Click on **Shopify**
4. Now type your shopify shop email id for example - udit-m.myshopify.com
5. Click on Install
6. Click on screen you will see a prompt click on “Yes” to proceed
7. Connect your Whatsapp Business manager account

What is the benefit of using Integrating WATI with Shopify

- It will help you to serve your customer for example Automated Message for order confirmation, live chat with your customer for 24x7 support

- It will help your business to reach out to your customers for example personalized marketing messages in whatsapp.

Step 5: Configure Basic WhatsApp Automation

Help them:

1. Go to **Automation > Templates** in WATI
2. Choose a few templates (e.g., order confirmation, shipping update).
3. Click "Submit for WhatsApp approval"

Question from client

Question - Can I add new templates for messages?

Answer - Yes , you can create message templates from the WATI dashboard.

Steps - Click on Broadcast tab >> On the top right corner >> Click on new template message >> create new template.

You can only use the template post approval from Meta.

Question - What if I want to change the message?

Answer - Yes, you can edit the text before you submit the template for approval.

Step 6: Explain the Dashboard

Covering other modules

- **Broadcasts:** Send mass WhatsApp campaigns and promotions
- **Contacts:** Manage customer details.
- **Webhook** : To send real time data to another website/ system.