The software is distributed as an Internet service, no special actions are required to install it on the user side, information on connecting the software to specific CRM systems can be found at:
https://wazzup24.com/help/

Software operation manual

SIA "WAZZUP"

Reg. No.: 40203253201 | VAT: LV40203253201

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Wazzup Software

(version 2.0)

Operation Manual

Pages 108

Riga, 2025

ANNOTATION

This document describes the technical means for storing source and object code for the software, the technical means for compiling source code into object code for the software, and the technical means necessary to activate, release, distribute and manage license keys for the software. This document is intended for administrators of the software “Wazzup”.

SOFTWARE DESCRIPTION

- Software type: Web application (SaaS)
- Name: Wazzup
- Programming language: JavaScript (development environment: Vue.js, Node.js)
- Target audience: marketers, entrepreneurs
- Project start date: August 1, 2017
- Project completion date: December 31, 2022

How to set up Wazzup

Step 1. Connect messenger

1. WhatsApp

How to connect WhatsApp

To connect, you need an installed WhatsApp or WhatsApp Business app. You can connect as many WhatsApp numbers as you want to Wazzup. For each number, chats are distributed to the right employees, and the manager keeps an eye on the correspondence.

How to connect WhatsApp to Wazzup

If you have a newly created WhatsApp account, don't connect it to Wazzup immediately — there's a risk that it may get blocked. To avoid this, use WhatsApp as usual for the next 24 hours without connecting it to our service. You can text anything to anyone: colleagues, relatives and other people. 10-15 active chats will be enough.

When there are active chats:

1. Go to "Channels" → "Add Channel".

2. Select WhatsApp → WhatsApp.

3. Scan the QR code.

Once added, the channel will appear in the "Channel List".

Within 30 seconds, the last three chats will be transferred to Wazzup. The remaining chats will load automatically when new messages are received — either when you send a message to the customer or when they reply to you.

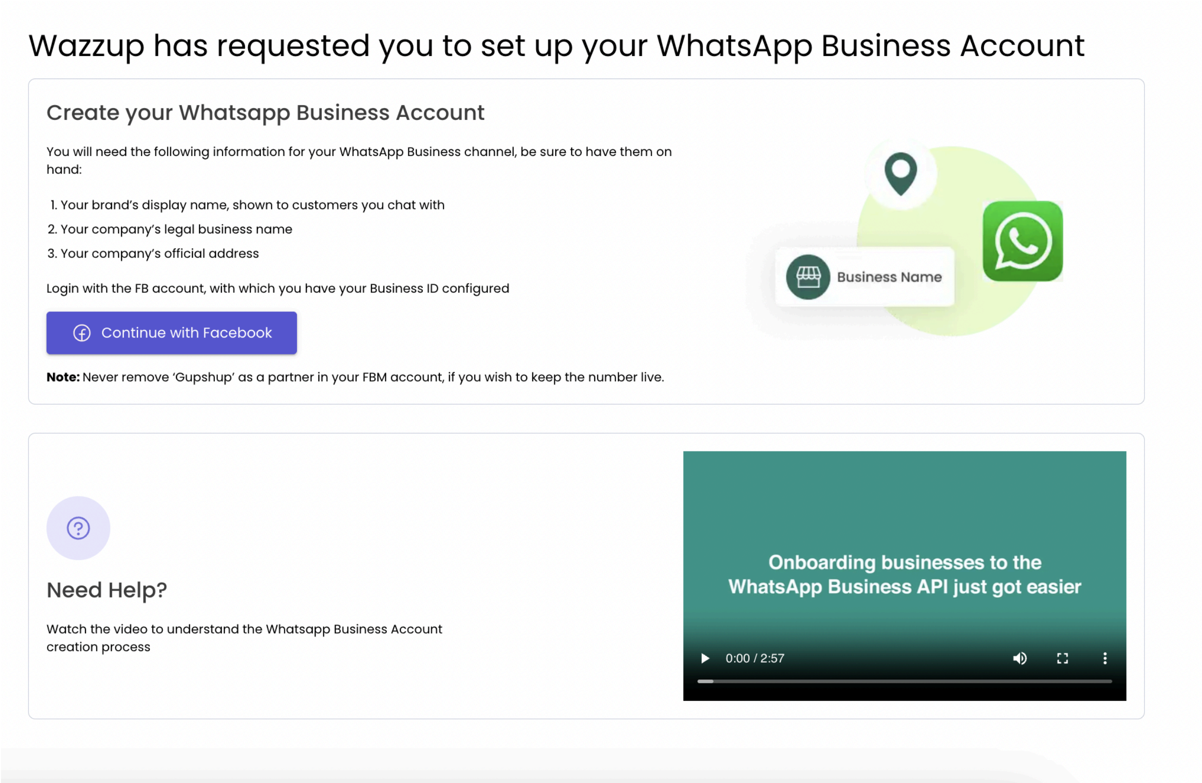
After adding your first WhatsApp channel, you have a three-day test period. You can use the service for free and test features without any restrictions.

How to connect to official WhatsApp (WABA)

To connect your official WhatsApp, simply add the number to your Wazzup account — it takes 10 minutes. Right after that you can test the service. You can connect as many official WhatsApp numbers to Wazzup as you want. For each number, chats are distributed to the right employees, and the manager keeps an eye on the correspondence.

Adding a number in Wazzup account

1. Go to the Channels section.
2. Click “WhatsApp” → “WABA”.
3. Click “Go to Add”. A new tab will open in your browser. If you are in Russia, enable VPN, otherwise you will not be able to log in.
4. Check the box and click “Connect Facebook business account/Add WhatsApp number”.



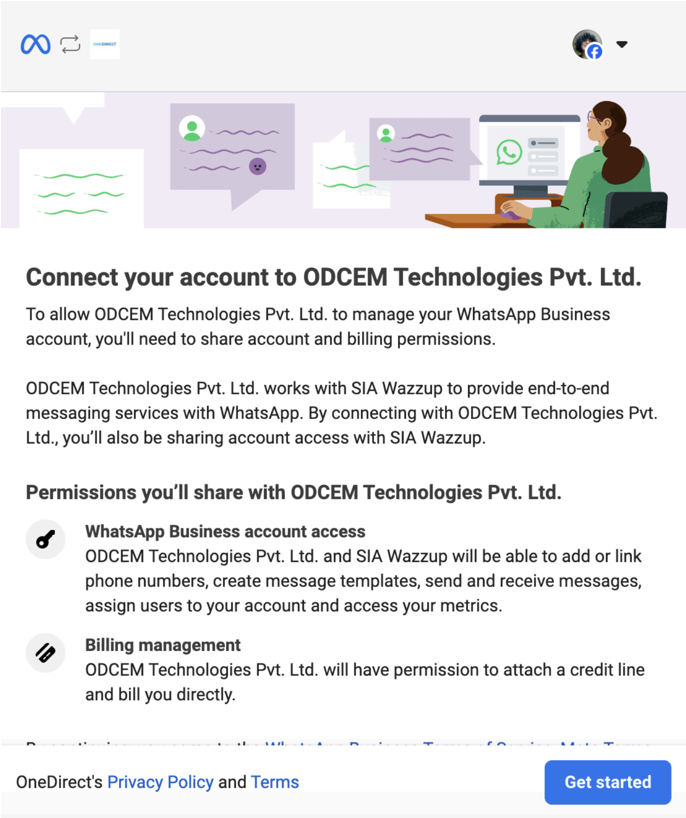
5. A new browser window with Facebook will open. Log in to Facebook there.

If nothing happens, check that:

-Pop-ups are not blocked in your browser,

-Extensions that alter the page appearance, such as translators or ad blockers, are disabled.

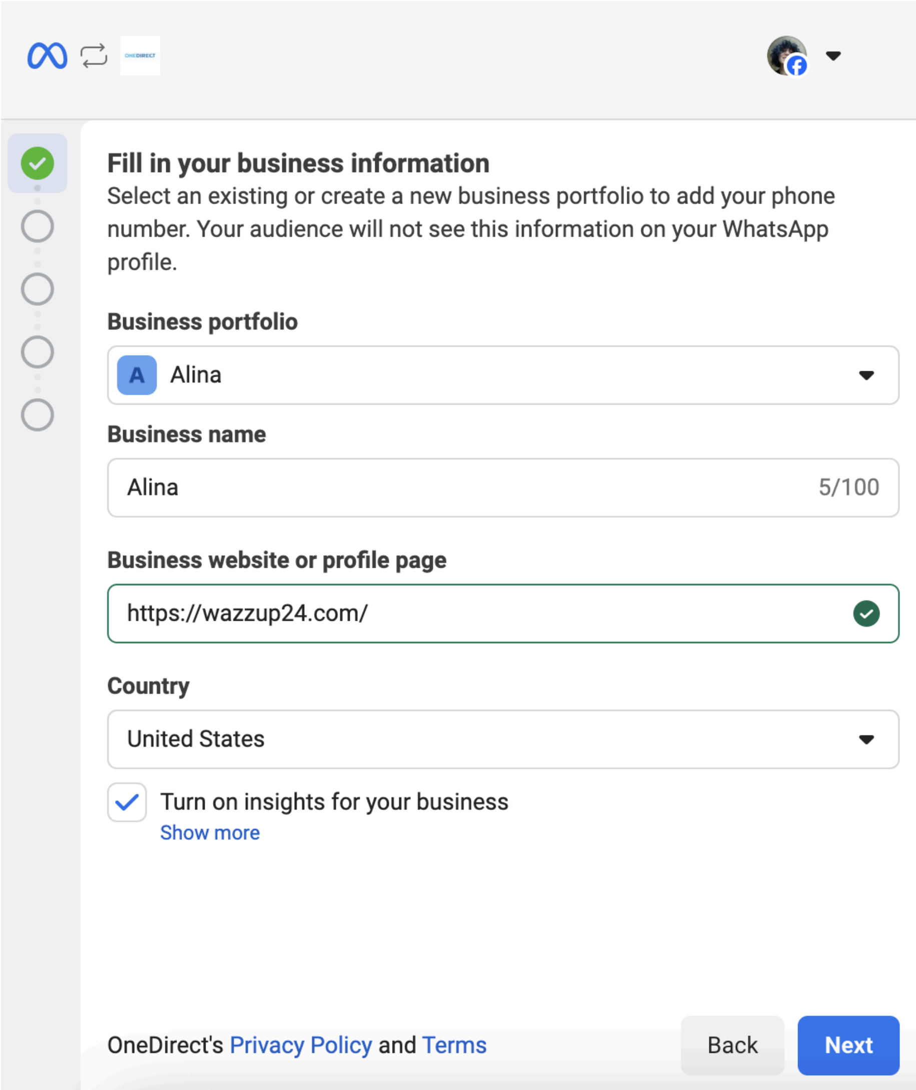
6. Click “Start”.



7. Click “Next”.

8. Select a Meta business account or create a new one.

If you already have a Meta business account — use it, click “Next” and go to point 9.



If you do not have a Meta business account — select “Create a Meta business account” → “Next”.

9. Select an existing WhatsApp Business account or create a new one. To create a new account, be sure to specify:

-username for the account,

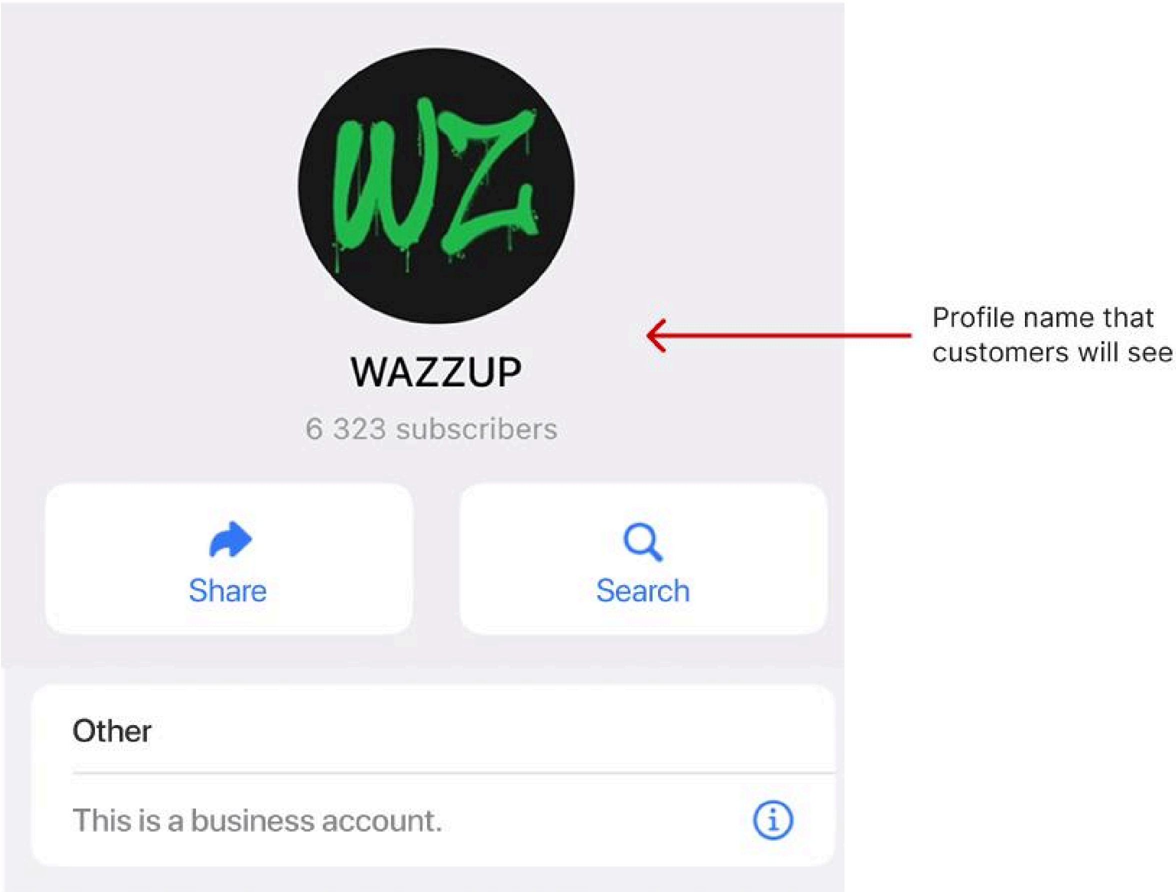
-displayed profile name,

-time zone,

-category.

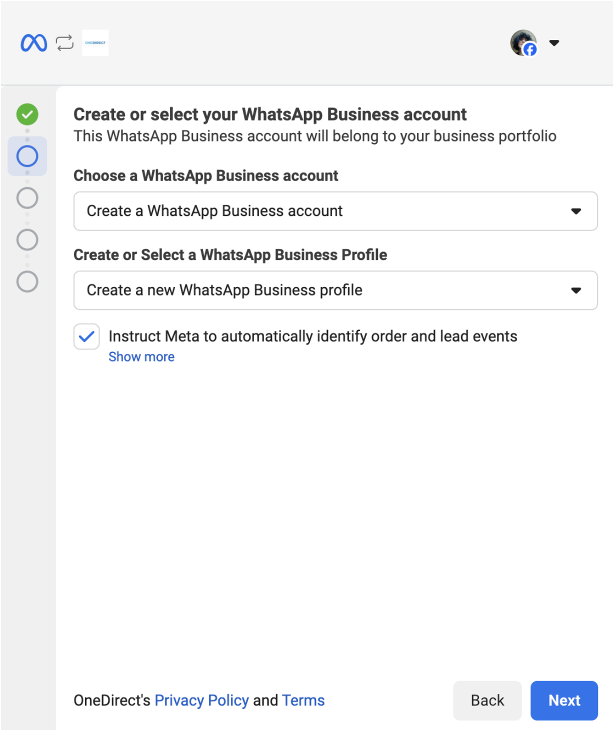
Customers will not see the username — it is necessary so that you can distinguish one account from another if you have more than one.

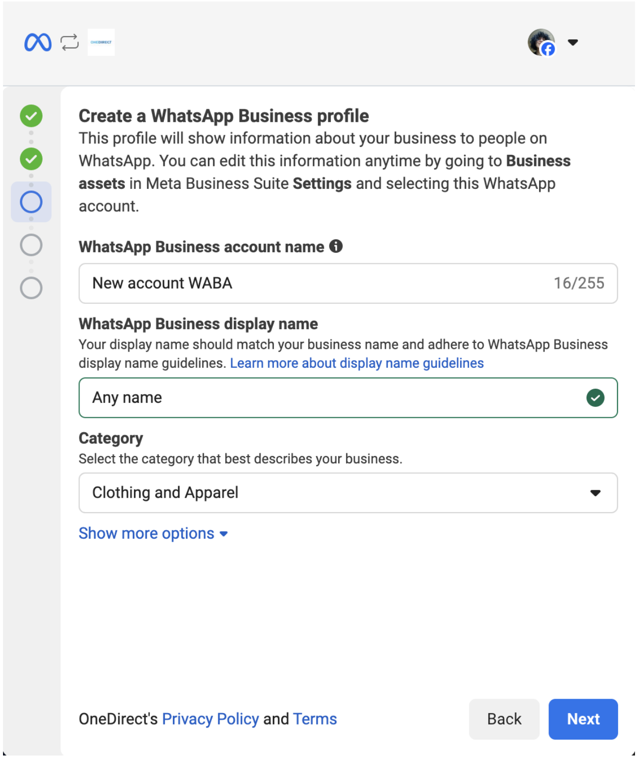
The profile name displayed must match the legal company name or the name that appears in the “header” and “footer” of your website.



How to specify the correct profile name

You can specify the company description and website right away, or choose to add them later in your Wazzup personal account. Then click “Next”.





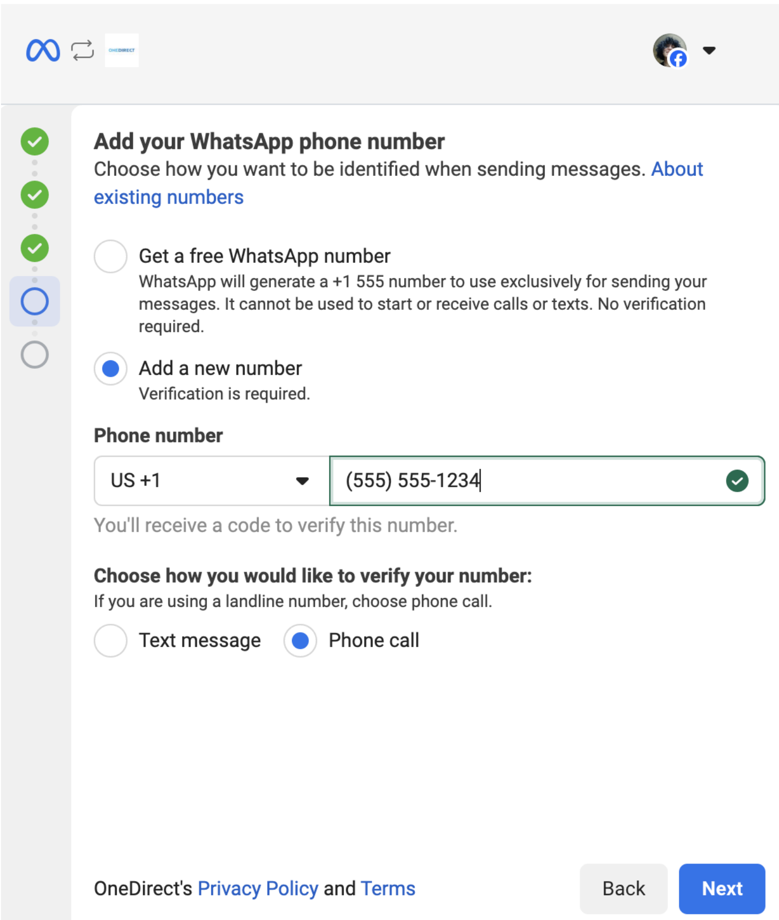
10. Enter the WhatsApp number.

You can only register the number in official WhatsApp if it is not registered in WhatsApp or WhatsApp Business.

If you register a number that you have never used in WhatsApp before, you may get the error “The number is registered in another account”, although this is not true.

To resolve the error, you need to create an account with this number in the WhatsApp app on your phone, then delete the account through the messenger settings following the instructions for Android or iPhone. There's no need to uninstall the app.

Choose your preferred confirmation method: receive the code via SMS or by phone call. If you have connected a landline number, select the call option. A robot will call you and read out the verification digits.



11. Enter the code and click “Next”.

12. Click “OK”.

The WABA channel will appear as “Active” in your personal Wazzup account.

How and why to verify your company in Meta

Verification determines how often you can send messages to your first customer.

By connecting a channel, you can start up to 250 chats per day. If you verify your company and verify your WhatsApp Business profile name — you can be the first to start up to 1,000 messages per day.

Verifying a company is easy: 10 minutes to submit an application and 3-4 days to receive an approval.

After verification, Meta will check the displayed profile name. This information is already provided when creating your WhatsApp Business profile and connecting the WABA channel, so no additional action is needed. Just wait for the approval.

When Meta verifies everything, you will be able to start 1,000 conversations per day, and over time, increase the number of available conversations to 10,000 or more.

Company verification in Meta:

1. Enable VPN if you are in Russia.

2. Navigate to the “Company Information” section in Meta. Ensure that all details are accurately and thoroughly filled out.

3. Prepare your documents for company verification. You will need to upload documents that confirm the following:

- The name of the company and the fact of its existence. Use the TIN for this purpose.

- Company address. Confirmed by a bank statement or utility bill. Ensure that the company name on the document matches exactly how it appears in the TIN, including spaces, quotation marks, and other symbols.
- Phone number. Verified with a utility bill or a bank certificate. When requesting a document from your bank, ask the bank employee to include the company's phone number.

To ensure smooth verification on the first attempt and avoid resubmitting documents, make sure that all information in your documents matches exactly what is listed in the “Company Information” section of the Meta website. Even minor differences in spacing, punctuation, or symbols can cause issues.

If there are discrepancies, update the information in your documents or correct it in the “Company Information” section before submitting.

4. Go to “Meta Security Center” → “Start verification”.

5. Ensure that all fields are filled out exactly as specified in the “Company Information” section. If there are discrepancies, correct them.

The Meta team will compare the data collected during the verification process with the information listed on your website. Therefore, the company name, phone number, and address must be consistent across your website, documents, application, and the information section.

6. Confirm the legal name of the company, upload a scan of the TIN.

7. Upload documents verifying the phone and address. Click “Next”.

8. Select verification method: by mail, phone, SMS or domain.

Wait and enter the code.

Done — you have submitted your company for verification. The process typically takes 1-2 business days.

You can check the status of your verification only in the Security Center.

If your application is rejected, don't worry. Applications are checked by people, and people can make mistakes. Simply review the information in your application against your documents, make any necessary corrections if needed, and resubmit.

If your application is approved, wait 1-2 business days while WhatsApp verifies that the profile name is correctly displayed. Once the channel status changes to “Unsubscribed”, you will be able to pay for the subscription and start using the service.

How to transfer a WABA number to Wazzup from another service

To transfer a WABA number to Wazzup, you need to:

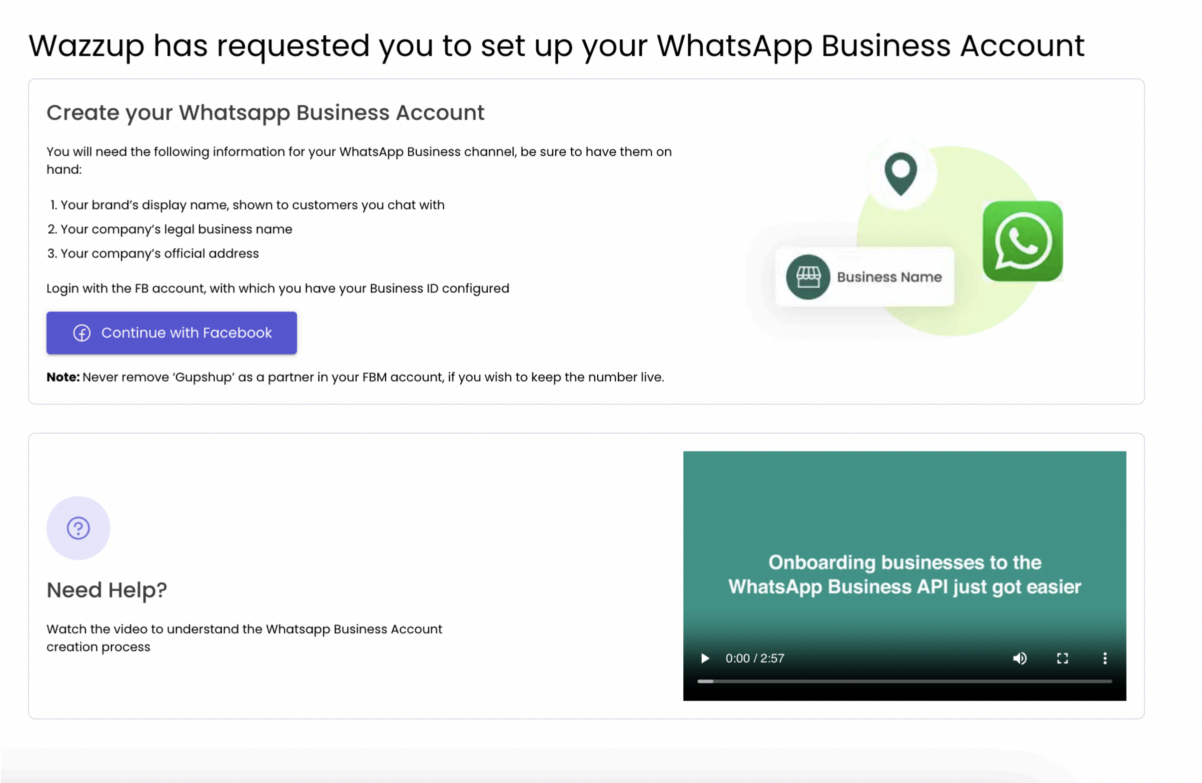
-Create a WABA channel in your personal account. It will take 5-10 minutes;

-Transmit some data to our support team.

Here's a step-by-step breakdown of the process:

1. Navigate to the “Channels” section in your Wazzup personal account.

2. Click “Add Channel” → WhatsApp → WABA → a new tab will open in your browser. In the new tab, check the box, then click the blue button below to proceed.



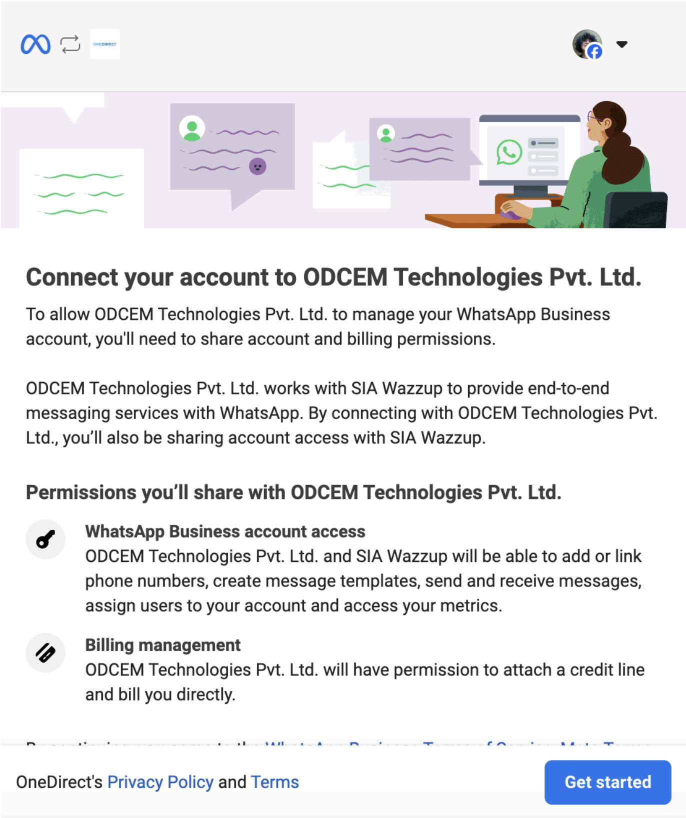
3. A new browser window will open with Facebook - log in to your Facebook account in this window.

If nothing opens, check that:

-Pop-ups are not blocked in your browser,

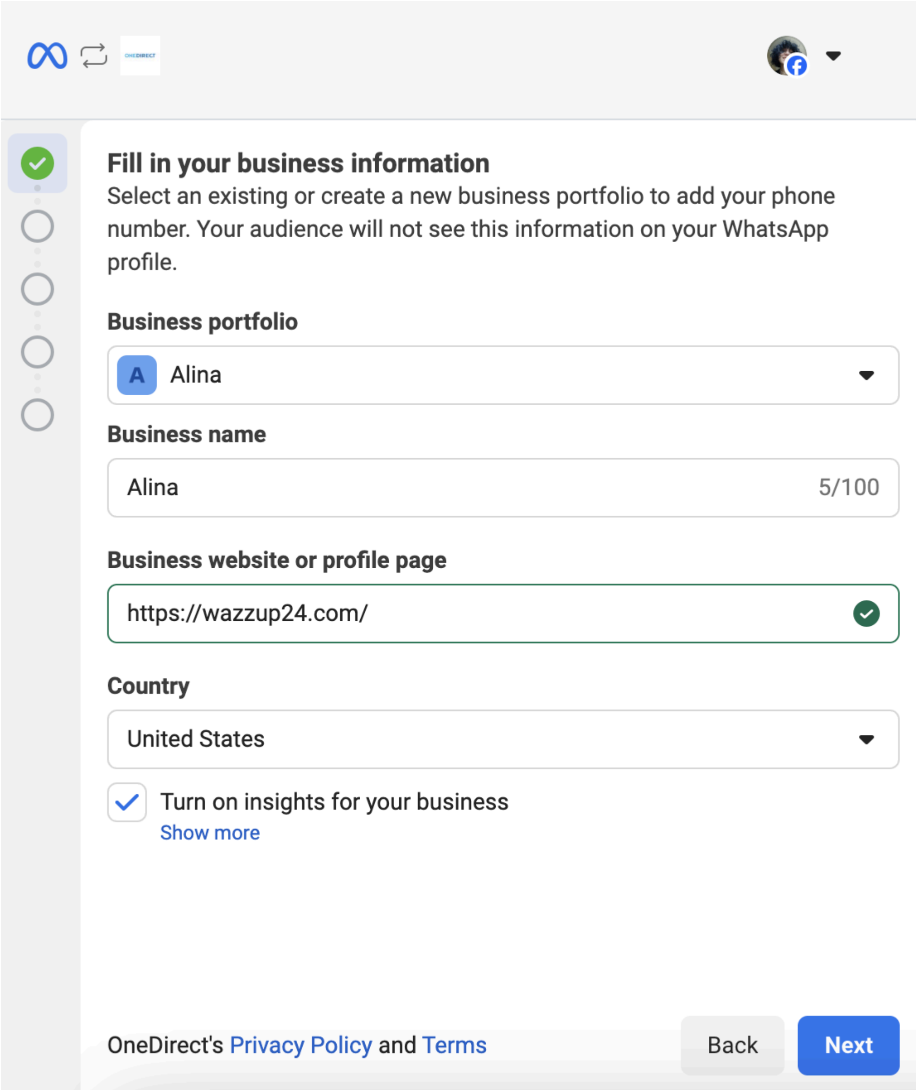
-Extensions that alter the page appearance, such as translators or ad blockers, are disabled.

4. Click “Start”.

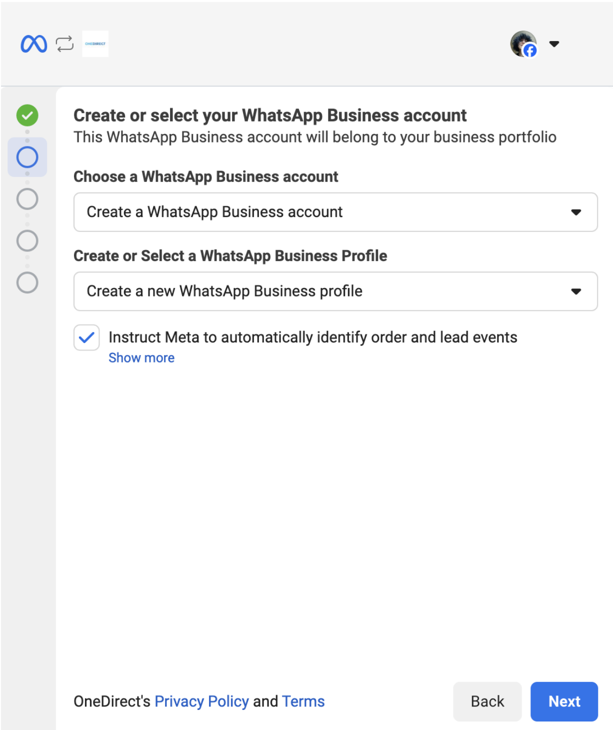


5. Click “Get started”.

6. From the list, select the business account associated with the number you wish to transfer to Wazzup. Click the “Next” button.



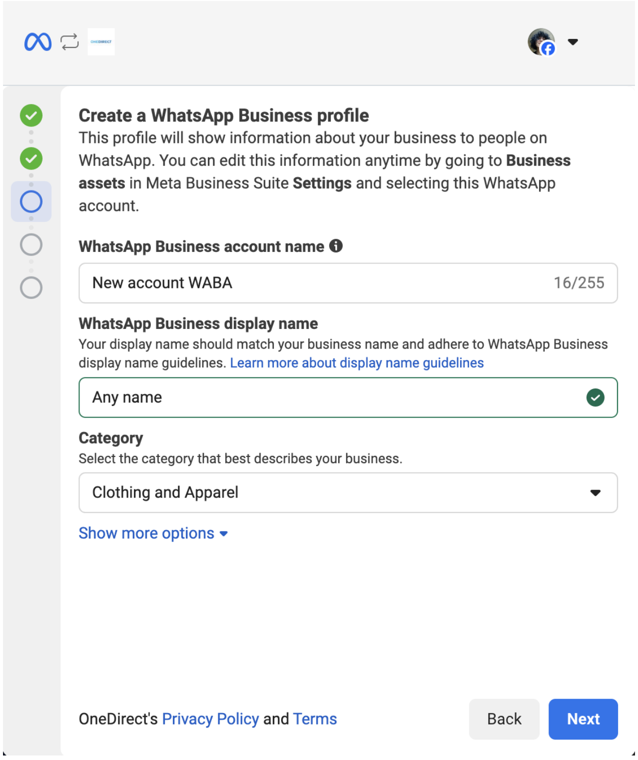
7. Click “Create a new WhatsApp Business account” → “Next”.



8. Fill in the company details:

- WABA account name — this name will only be visible in the Facebook account, customers will not see it. You can enter any name you like.
- Display name — you can also choose any name here, as this is an internal channel used solely for creating the WABA account.
- Time Zone.
- Category — you can select any category.

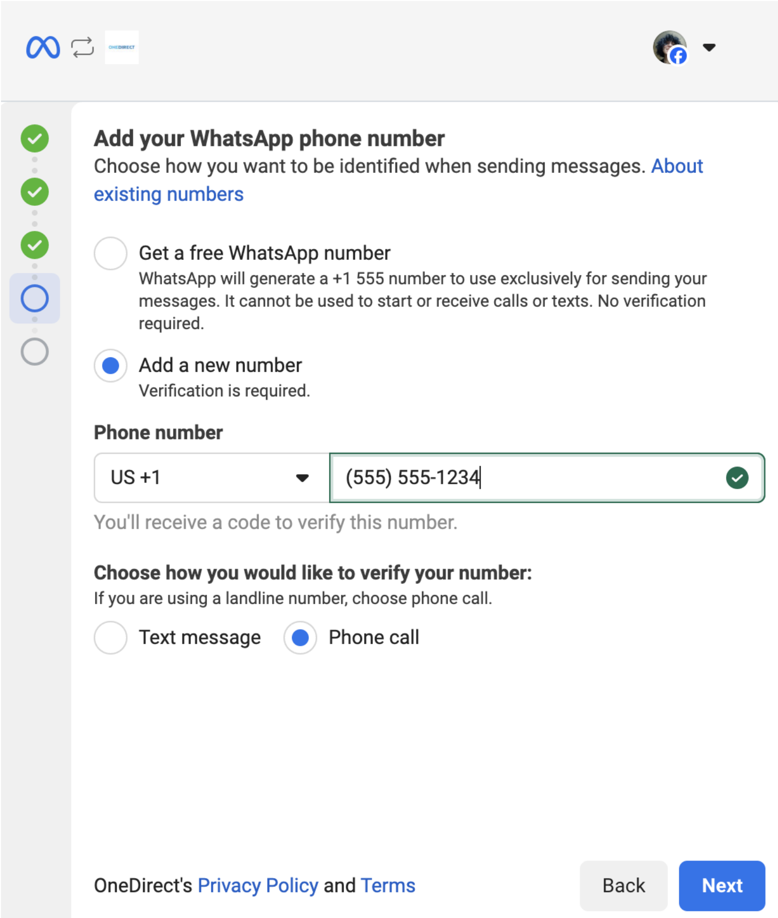
Click “Next”.



9. Now enter any non-existent number that is similar in format to the real number. For example, +1 999 999 999 999. This is only required during the creation of the WABA account; you can delete it afterwards.

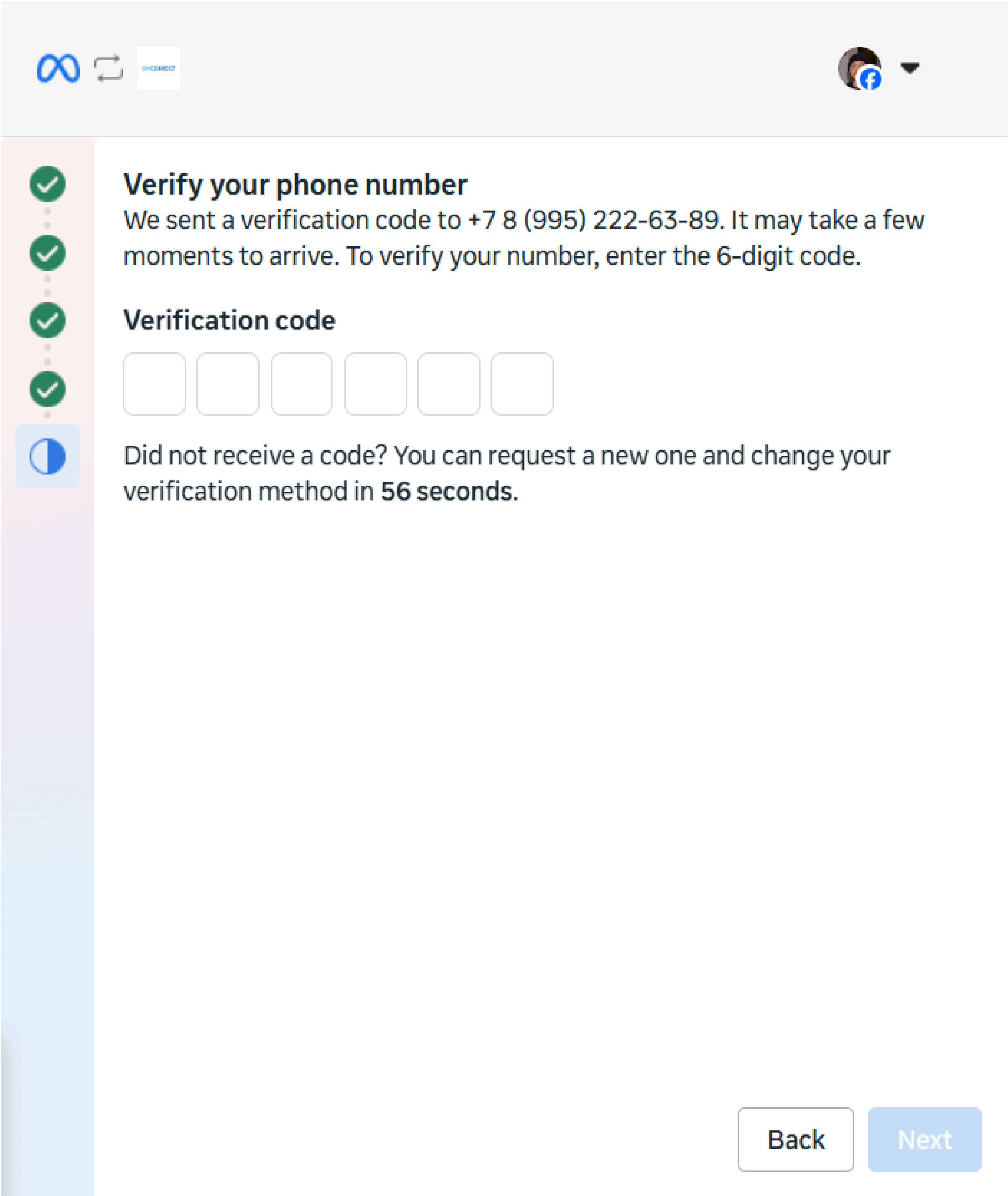
Select SMS as the confirmation method.

Click the “Next” button.



10. An error message will appear — this is normal, as the number entered does not exist.

The account for number porting has already been created. You can safely close the error window.



Done. What's next — the support team will tell you ;)

2. Instagram

Instagram API: what is it and how does it work?

In Wazzup, you can only connect the Instagram API — it's an official solution provided by Instagram. Simply add the channel, and you can communicate with your customers effortlessly.

Can I text first?

No. You can message first to Direct from the app on your phone. When a customer replies to your message, a chat window will open and remain active for 7 days. During this period, you can continue messaging the customer through the Instagram API channel.

Each new message from the customer extends the chat window by another 7 days. If the 7-day period expires, you will no longer be able to message that customer.

How to reply to a post comment?

A comment to a post comes as an incoming message to the chat room. If you reply with a quote — the message will be sent as a reply to the post comment.

You can only reply to a comment with a quote in Wazzup chats. You cannot reply to a comment with a quote from the native amoCRM or Bitrix24 Open Lines chats.

How to reply to a comment on a post with a message in Direct?

If you reply to a comment without quoting it, the message will be sent to the customer in Direct.

You can only reply to a comment in Direct within seven days after the original comment was posted. For each comment, you can send only one message in Direct. After that, you must wait for the customer to reply before continuing the conversation.

When the customer responds to your Direct message — a 7-day dialog box will open. During this time you can text the customer from the Instagram API channel.

Each new message from the customer extends the chat window by another 7 days. If the 7-day period expires, you will no longer be able to message that customer.

How to connect the Instagram API

To start using the service, connect your feed.

You can add an Instagram API feed if you have an Instagram business account linked to your Facebook business page.

To connect to the Instagram API, you need to be logged in to Facebook. If you're in Russia — enable VPN, otherwise you won't be able to log in to Facebook.

1. Go to the “Channels” section in your personal Wazzup account.

2. Click “Add Channel” and select Instagram API.

3. Click “Sign in”.

4. Select your Facebook profile or log in with your username and password.

5. Select the Instagram business account for which you want to add a feed → “Next”. You can select multiple accounts at once.

6. Select the Facebook business page that this Instagram business account is linked to. → “Next”. You can select multiple business pages.

7. Keep all the sliders enabled. If you disable any options or do not grant the necessary permissions to the Wazzup Messenger Official API app, the feed may not function properly.

8. Click “Done” → wait for a while → click “OK”.

9. Select the Instagram account you want to create a feed for and click “Add”.

If you need to add multiple channels, again click the green “Add Channel” button and select an account to create an Instagram API channel.

Once added, Instagram will appear in the channel list and you'll start receiving direct messages and comments under posts.

To prevent distractions from unwanted comments and avoid creating irrelevant deals in the CRM, set up a comment filter or disable the receipt of such comments.

When you've added your first Instagram feed, you have three days to test it for free.

Setting up comments from Instagram

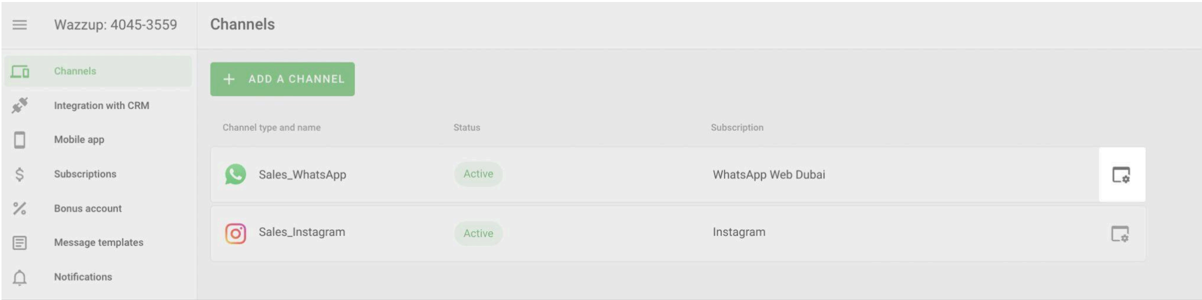
Not only direct messages come from Instagram, but also comments. Each comment from a new user creates a deal in CRM — the salesperson can reply to the customer under the post or in a direct message.

If you prefer not to receive comments from Instagram, you can disable comment notifications and communicate with customers exclusively through Direct messages. Alternatively, set up filters to receive only the comments you want to see.

Instagram comments filters

To prevent salespeople from being distracted by unwanted “trash” comments and to ensure they focus only on requests, set up filters. Here's how to do it:

1. Navigate to the “Channels” section in your Wazzup personal account.



2. Click the gear icon on the right side of the channel panel to open the channel card. Comment filter settings are configured in steps 3–4.
3. Receive comments from posts.

This setting helps save your team's time while processing comments.

If you want to exclude comments from certain posts, select "From all except those listed" and paste the links to those posts in the input field.

For example, you're running a contest asking followers to tag friends in comments. Such comments don't lead to sales and can be filtered out to save time.

If you rarely publish posts aimed at collecting bids → select "Only from listed" and insert links to sales posts.

If you want to receive all comments → select "From all except those listed" and leave the "Links to posts" field empty.

4. Spam comments filter

Emojis and comments often appear under Instagram posts where followers share their opinions rather than express a purchase intent. To prevent your team from wasting time on these non-productive interactions — set up a spam filter.

Remember to click the "Save" button at the top of your channel card after making any changes to the settings

3. Telegram

You can connect as many Telegram accounts to Wazzup as you want. For each account, chats are distributed to the right employees, and the manager keeps an eye on the correspondence.

If you don't have a Telegram account yet, create one using a phone number that already receives calls from customers. This way, customers can call and send messages to the same number.

How to connect Telegram in Wazzup

1. Go to “Channels” → “Add Channel”.

2. Select Telegram.

3. Scan the QR code. If you have enabled two-factor authentication — enter your password → “Done”.

Once added, the channel will appear in the “Channel List”.

Within 30 seconds, the last three chats will be transferred to Wazzup. The remaining chats will load automatically when new messages are received — either when you send a message to the customer or when they reply to you.

Next, connect Wazzup to your CRM: Bitrix24, amoCRM.

How to connect Telegram Bot

A Telegram Bot is required for customers to send messages to your Telegram account. New messages will be used to create deals, and correspondence will be saved in CRM.

From that channel you cannot initiate chats with a customer. If you need this feature — connect Telegram Personal.

How to connect:

- Go to “Channels” → “Add Channel”.
- Select Telegram Bot.
- Insert the bot token → “Add”.

The channel will be added to the “Channel List”. Chats will appear as soon as customers start messaging you.

4. VKontakte

You can connect unlimited VKontakte communities to Wazzup. Only the community administrator has permission to add a community.

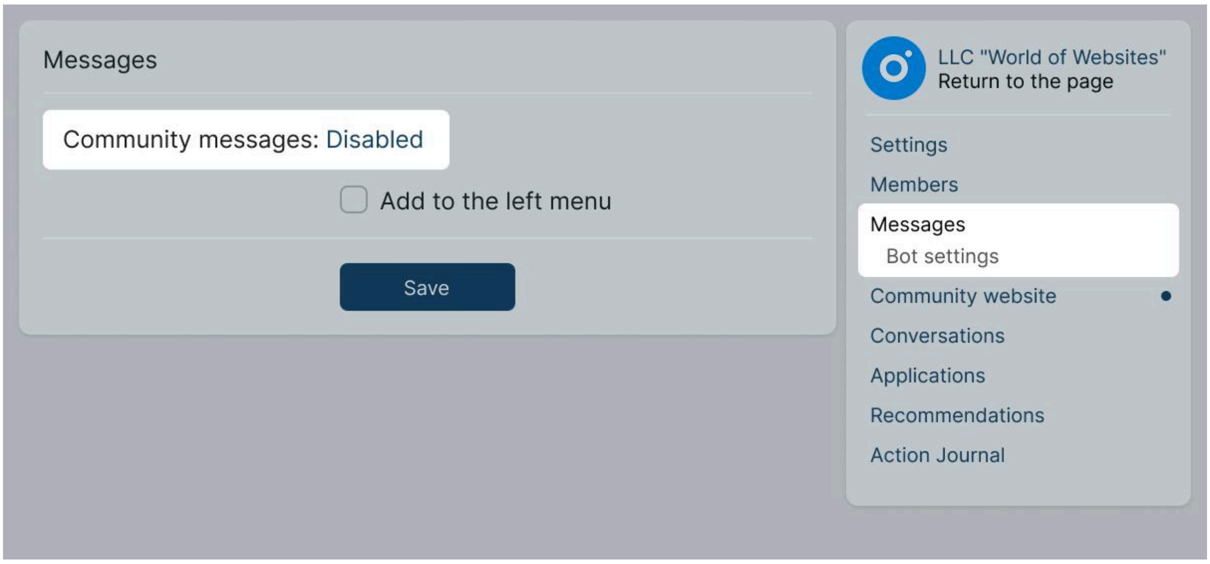
Messages received through the community's inbox and comments on posts will be imported into the CRM. Your sales team will be able to respond to customers, and managers can keep an eye on the correspondence.

Please note that VKontakte cannot be connected directly to Bitrix24 Open Lines, but you can manage all interactions through our CRM chat rooms — they have all the features you need.

How to connect VKontakte in Wazzup

1. Go to the “Manage” section on the right side of the VKontakte community page.

2. Select “Messages” from the menu on the right side:



3. Enable Community Messages.

4. Go to your Wazzup account under “Channels” → “Add Channel”.

5. Choose VKontakte → “Authorization”.

6. Log in to VKontakte and allow access to your account.

7. Select the VKontakte community where you want to add a channel → allow access to the community. You will be prompted not to copy the link from the address bar → copy link

To copy the link in Yandex.Browser and Safari, right-click in the address bar → copy address.

8. Go back to Wazzup and paste the link → “Add”.

Once added, the channel will appear in the “Channel List” and chats from the last 7 days will be imported.

5. Avito

You can connect as many Avito profiles to Wazzup as you wish.

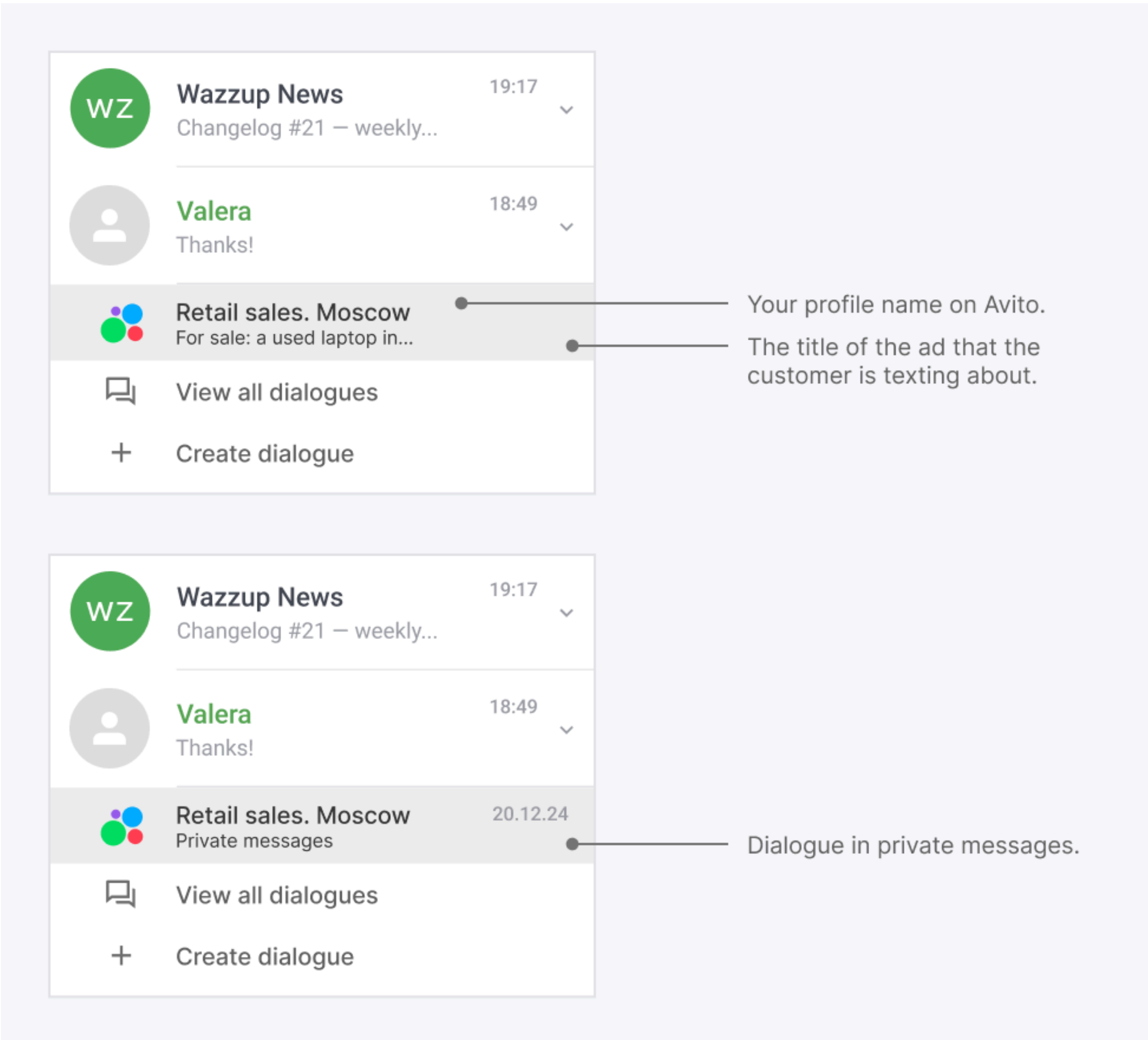
- Go to “Channels” → “Add Channel”.
- Select Avito.

- A window for authorization will open. Log in to the desired Avito profile and grant Wazzup all necessary permissions.
- Click “Continue”.

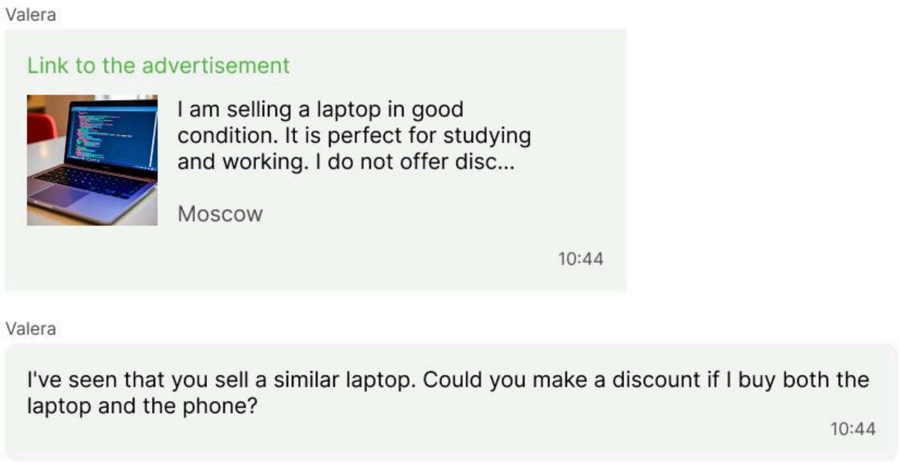
The new channel will appear in the list, and the last three chats will be transferred. You will have three free days to test everything.

How chats work on Avito channels

There are two types of chats on Avito channels: ad chats and private message chats.



If a customer sends you an ad via private message and asks a question about it, this would look like this:



Missed call notifications do not appear in chats; they can only be viewed in the Avito app.

From the Avito channel, you cannot initiate a conversation with a customer who has not yet contacted you.

How deals and contacts are created by messages in Avito

When a customer sends their first message related to an ad, a new contact, deal, and chat are automatically created.

If the same customer messages you about two different ads, two separate contacts will be created in the CRM. The contact's name will include the customer's name along with the specific ad they responded to. Additionally, a separate deal will be created for each ad interaction.

If a deal is closed and the customer texts you about the same ad again, no new contact or deal will be created. Instead, the new message will appear within the existing dialog thread.

For the first private messages a separate contact, deal and dialog will be created. Subsequent messages from that customer will be linked to the existing contact and dialog.

Step 2. Connect Wazzup to CRM

1. Bitrix24

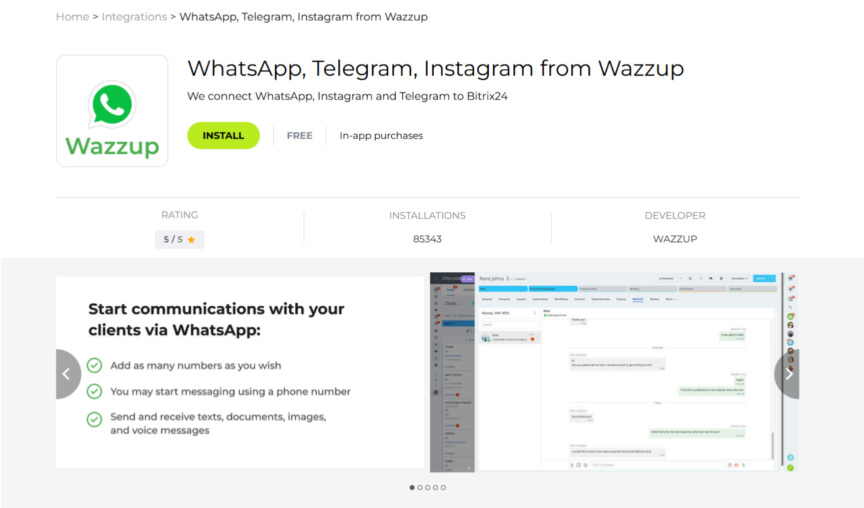
How to connect Bitrix24

Integration with Wazzup is available only to users who have paid Bitrix24 tariffs plans.

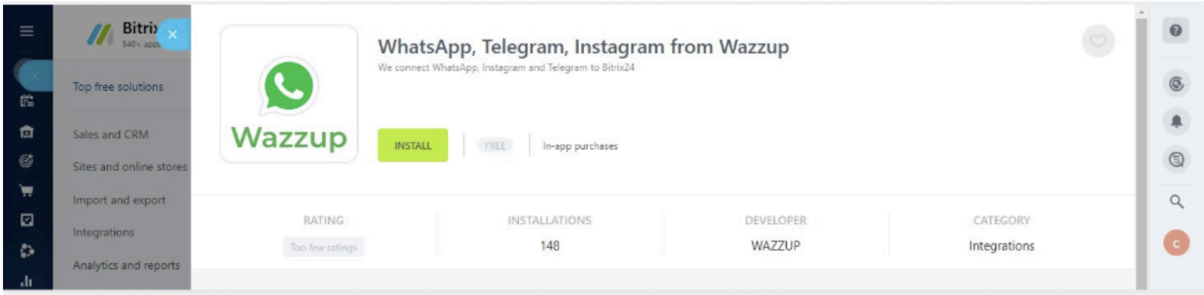
1. Go to the “Integration with CRM” section in your personal Wazzup account → “Bitrix24”.

2. Go to “Bitrix24 Marketplace” using the link from “Step 1”.

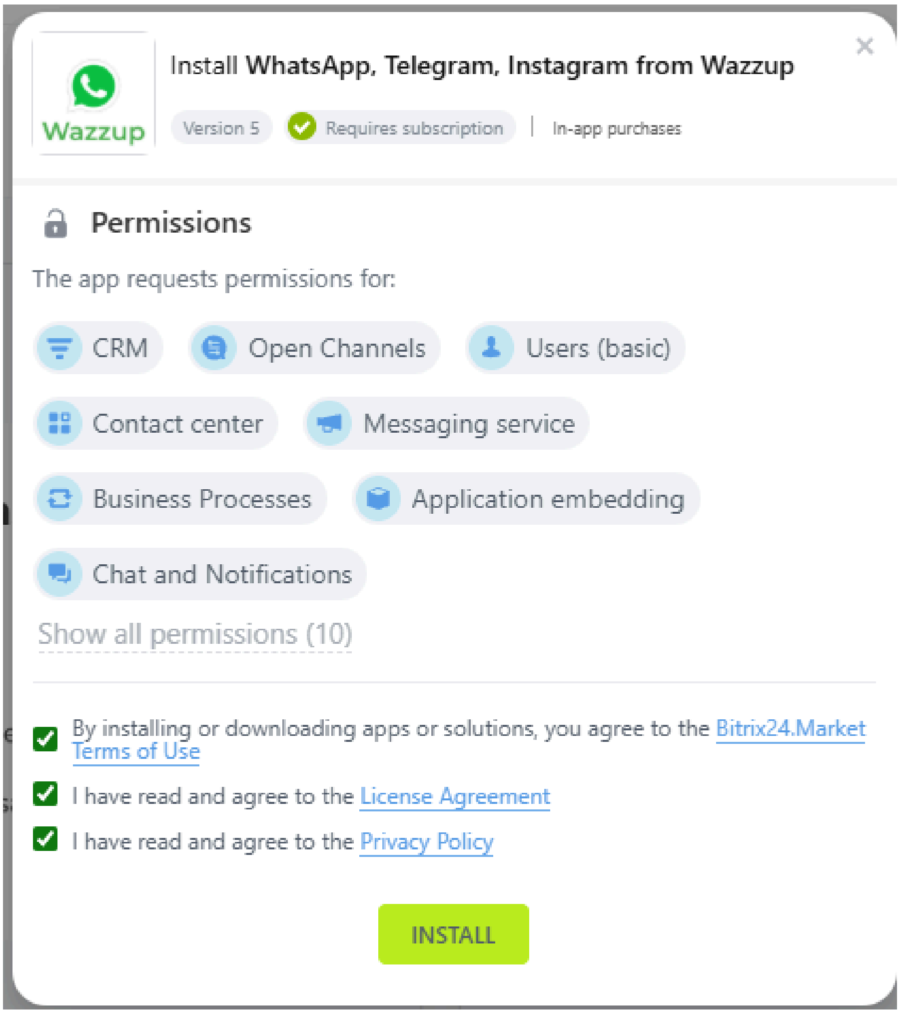
3. Click the “Install” button. Please note that only a user with Bitrix24 administrator rights can perform this action. If the account administrator changes, the integration will stop working, and it will need to be set up again.



4. Click “Install” again.



5. Agree to the terms of use and click “Install”.



6. Copy the link to your Bitrix24 domain from the browser, for example https://valerkinaRadost.bitrix24.ru

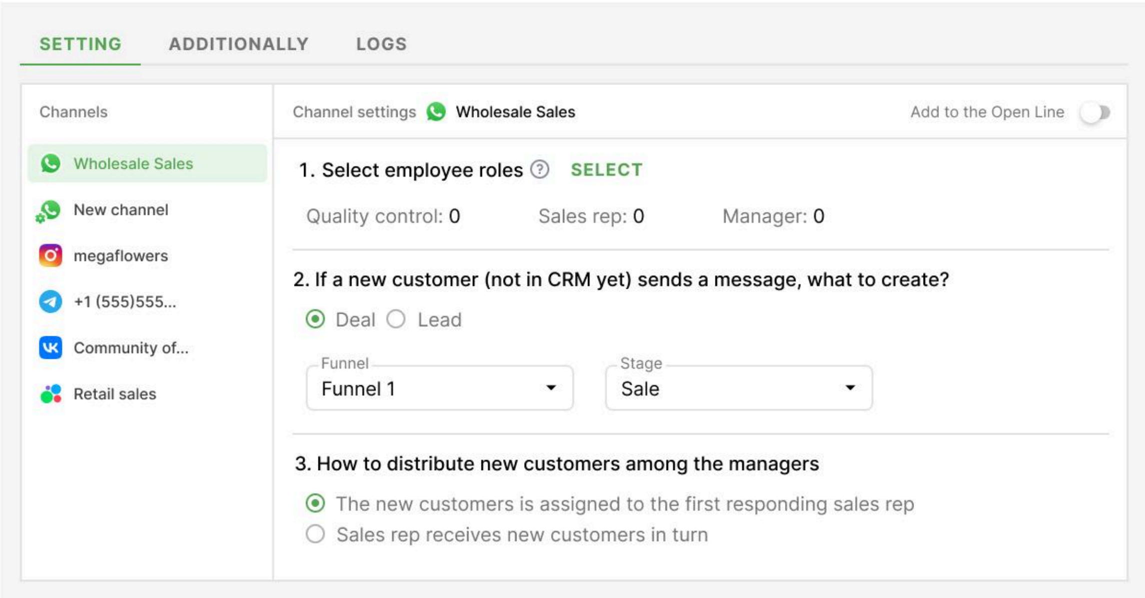
7. Go to your personal Wazzup account and paste the copied link into “Step 2”. Next, click “Continue” and then “Connect”.

Your integration with Bitrix24 is now complete. A new tab will open confirming the successful connection.

Go back to your Wazzup personal account. Instead of CRM tiles, you'll see the settings for the connected integration. To ensure that everything functions correctly, the integration must be customized accordingly.

Setting up integration with Bitrix24

After connection, the settings will appear on the “Integration with CRM” tab. Here, you can customize which chats are visible to salespeople and how customers are distributed among them.



You can communicate with customers in Bitrix24 via Wazzup chat rooms or Open lines.

1. Select employee roles

The role determines the employee's permissions: which chats they can access and whether they can communicate with customers. To assign a role, click “Select” — a modal window will open displaying a list of all employees from the CRM.

If not all employees or purchase funnels are visible in the list, click “Update data from CRM”, and the latest information will be loaded.

Assign one of the following roles to each employee:

- Sales rep — can only communicate with customers assigned to them in CRM. They cannot see or access chats of other sales representatives.
- Manager— can view and respond to all customer messages, regardless of assignment.
- Quality Control — can view all chats but cannot send messages to customers.

If you don't know which roles to assign, see the examples for the most frequent cases:

- If only the responsible salesperson works with the customer

If you have a typical sales team where each customer is managed exclusively by the assigned salesperson, select the «Sales rep» role.

The salesperson will only see the correspondence related to customers assigned to them in CRM, ensuring they are not distracted by chats of other salespeople.

- If you need to see all incoming messages

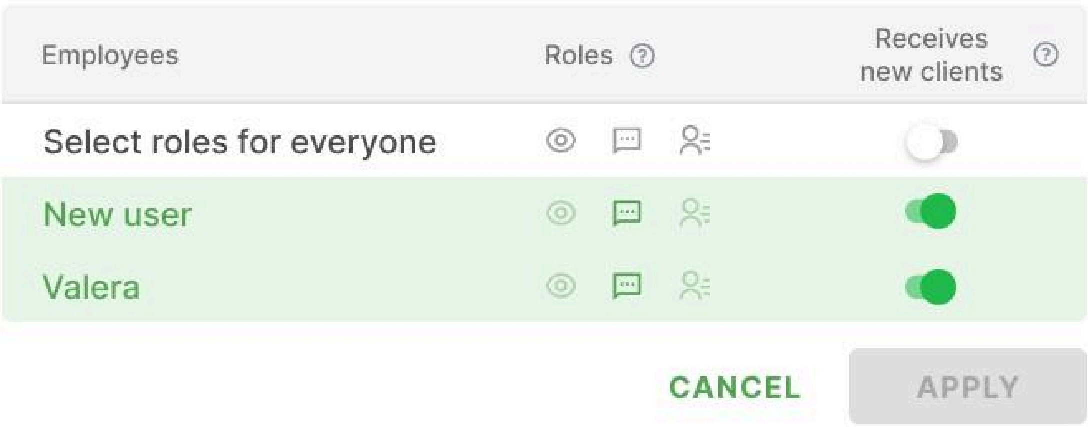
If you want your employees to see all incoming messages, assign them the «Manager» role. In that case, you don't need to manually distribute chats. It can be especially useful for online stores and support teams.

Customer inquiries will simply be addressed promptly by the first available team member. If you operate on a shift schedule, there's no need to assign chats individually — messages will be handled by the employee on duty.

- If only one salesperson responds to messages from the channel

If only one salesperson responds to messages from the channel, assign them the «Manager» role. This ensures they can view all incoming messages and respond promptly, even if there are CRM updates or technical issues.

Enable the option «Receives new clients» for those employees who should be assigned deals from new customers. Click "Apply" and "Done".



2. Specify what should be done when a new customer (not in your CRM yet) contacts you

When you receive a message from a new customer who is not yet registered in your CRM, you will be asked what to create: either a contact and a deal or a lead.

If you select to create a deal, specify where it should be assigned within your CRM.

3. Distribute new customers among sales representatives

When a new customer sends a message, all salespeople with an enabled option «Receives new clients» will receive a notification. A new customer is assigned to the first sales representative who responds.

The first salesperson to respond will become the responsible contact in your CRM. Once assigned, other sales representatives will no longer see messages from this customer and won't be distracted by them.

Sales representatives get new customers one by one. When a new customer sends a message, the system automatically assigns them to one of the salespeople with an enabled option «Receives new clients». Other salespeople will no longer see messages from this customer.

To enable this, make sure to activate the «Receives new clients» option for employees you want to assign deals to. If this setting isn't enabled, no one will receive notifications about new customers or deals.

Configure additional settings for integration with Bitrix24

Additional settings are located in the «Integration settings» under the tab “Advanced”. They apply to all channels.

1. Display messages in the event feed of leads, contacts and deals

Sales representatives communicate in Wazzup chats and can view all correspondence with customers there.

If you want correspondence to be displayed not only in Wazzup chats, but also in the Contacts, Deals, and Leads event feed, enable this setting. If you don't need to duplicate messages in the event feed — disable it.

This setting does not work for feeds in Open Lines. When a customer sends a message for the first time, a notification will appear in the event feed, but the correspondence history will not be duplicated there. All messages are visible only in the Open Lines chats.

2. Treat numbers recorded in CRM with an 8 as numbers with +7

Salespeople often enter phone numbers in CRM starting with an 8, for example: 89164569812. Since WhatsApp operates worldwide, it interprets 8 at the beginning of a phone number as the first digit of the country code (common in some Asian countries). This setting helps ensure correct formatting.

Enable the setting if in your CRM system there are numbers starting with an 8, and they will be automatically considered as Russian (+7). There will be no changes to the initial number in the CRM.

Disable this setting if you have customers from Asian countries, where the leading 8 may be part of the actual number.

3. Notify users with «Manager» rights of all messages

This setting may be useful if there are salespeople with the «Manager» role (set in the «Select employee roles» settings).

Enable this setting if salespeople with the «Manager» role need to be notified about all chats, including those for which they are not responsible.

Customer inquiries will be addressed promptly by the first available team member.

If this setting is disabled, it will work as follows:

A salesperson with the «Manager» role will receive notifications only for chats they are responsible for. New messages in these chats will have a red numeric icon.

They won't receive any notifications about new messages from chats handled by other salespeople. Incoming messages in these chats will have a gray numeric icon.

It can come in handy for traditional sales teams where the manager not only keeps track of other sales representatives' work but also actively interacts with their own customers.

4. Set priority channel

This option will only appear if there are employees with access to multiple WhatsApp or Telegram channels.

For each sales representative, select the channel from which messages will be sent by default, if the sales representative contacts the customer first.

If a sales representative needs to send a message from a different channel, they can simply change it when sending the message.

2. Kommo

How to connect Kommo

Go to the «Kommo» section in CRM, search for «Wazzup» and install the application in one click.

From the link in the app card, go to Wazzup and then open the “Integrations” section.

Select Kommo, insert your account link, click «Continue» → «Connect». A tab with amoCRM will open.

Select the Kommo account → «Allow». A new tab will open confirming the successful connection.

If you don't see amoMarket, it means you're using an older version of CRM.

Here's how to set up the integration:

1. Go to the «CRM Integration» section in your personal Wazzup account and select amoCRM. A data entry window will appear.

2. Enter your Kommo domain, then click «Continue» → «Connect». A new tab with Kommo will open.

3. Select your Kommo account and click «Allow». A notification confirming the successful connection will appear.

4. Log in to your Kommo account. In the left menu, go to «Settings» → «Integrations».

5. In the «Installed Integrations» section, select Wazzup.

6. In the opened window, click «Save».

Great – you have successfully connected the integration.

Go back to the «CRM Integration» section in your personal Wazzup account. Instead of CRM tiles, you'll now see the settings for the connected integration. To ensure that everything functions correctly, the integration must be customized accordingly.

Setting up integration with Kommo

To set up integration, go to the «Integration with CRM» section. Here, you can customize which chats are visible to salespeople and how customers are distributed among them.

1. Select employee roles

The role determines the employee's permissions: which chats they can access and whether they can communicate with customers. To assign a role, click «Select» — a modal window will open displaying a list of all employees from the CRM.

If not all employees or purchase funnels are visible in the list, click «Update data from CRM», and the latest information will be loaded.

Select one of the roles for each employee:

- Sales rep — can only send messages from Wazzup chats to customers assigned to them in CRM. They cannot see or access chats of other sales representatives.
- Manager — sees all correspondence and can send messages to any customer.
- Quality Control — can view all chats but cannot send messages to customers.

If you don't know which roles to assign, see the examples for the most frequent cases:

If only the responsible salesperson works with the customer

If you have a typical sales team where each customer is managed exclusively by the assigned salesperson, select the «Sales rep» role.

The salesperson will only see in Wazzup the correspondence related to customers assigned to them, ensuring they are not distracted by chats of other salespeople.

Employees with the «Sales rep» role can only send messages from Wazzup to customers they are responsible for in CRM. However, in Kommo chats they will still be able to send messages to any customer.

If you want the «Sales rep» to see only their deals and prevent them from messaging customers assigned to other salespeople in Kommo chats, you need to configure user permissions in Kommo. Note that if an employee goes on a sick leave or vacation, you'll need to reassign their customers. Alternatively, you can grant certain employees access to all chats, allowing them to respond quickly without changing customer assignments.

- If you need to see all incoming messages

If you want your employees to see all incoming messages, assign them the «Manager» role. It can be especially useful for online stores and support teams. Customer inquiries will be addressed promptly by the first available team member.

- If only one salesperson responds to messages from a channel

If only one salesperson responds to messages from a channel, assign them the «Manager» role. This ensures they can view all incoming messages and respond promptly, even if there are CRM updates or technical issues.

Enable the option «Receives new clients» for those employees who should be assigned deals from new customers. Click «Apply» and «Done».

2. Specify what should be done when a new customer (not in your CRM yet) contacts you

You can select where to create deals and how to distribute them among sales representatives.

- If you need the customer to be assigned to the first salesperson to respond

If you choose the «Initial contact» option, all salespeople from step 1 will receive notifications about new messages. Once a salesperson responds to one of the customers from the «Initial contact», a deal is created and the salesperson becomes responsible for the customer in the CRM. The other salespeople will no longer see messages from that customer in Wazzup chats and won't be distracted by them.

If, during setup, you specified that new requests should go into the «Initial contact», then all employees with the «Sales rep» and «Manager» role will be notified about new requests.

- If you need to distribute customers among salespeople in turn

Select the stage and funnel where the deal should be created. When a new customer contacts you, the system will automatically generate a deal and assign them to one of the salespeople who has the «Receives new clients» option enabled.

Other sales representatives will not see messages from that customer, ensuring that salespeople receive new requests in turn without being distracted by other chats.

To enable such distribution, go to point 1 in the settings and activate the «Receives new clients» option for each employee who should receive new deals automatically.

If you do not enable this, requests will be directed to the «Initial contact», and sales representatives will need to manually sort them.

That's it, you've set up which chats your salespeople will see and how customers will be distributed between them. If your sales team includes employees with access to multiple channels or employees with the «Manager» role, you need to adjust a few additional settings.

Additional settings for integration with Kommo.

Additional settings are located in the «Integration settings» under the tab «Additional». They apply to all channels.

1. Treat numbers recorded in CRM with an 8 as numbers with +7

Sales representatives often enter phone numbers in CRM starting with an 8, for example: 89164569812. Since WhatsApp operates worldwide, it interprets 8 at the beginning of a phone number as the first digit of the country code (common in some Asian countries). This setting helps ensure correct formatting.

Enable the setting if in your CRM system there are numbers starting with an 8, and they will be automatically considered as Russian (+7). There will be no changes to the initial number in the CRM.

Disable this setting if you have customers from Asian countries, where the leading 8 may be part of the actual number.

2. Decode links sent by Salesbot into their original form.

If you have set up automation with SalesBot and send a link, SalesBot will automatically shorten it to track future clicks. It will look like this: https://amo.si/F/UB54UX/LZTX3U

If you do not need to track link clicks, enable this setting. The shortened link will then be decoded and sent in its original form, exactly as it was inserted in SalesBot. This way, recipients will see the actual URL, which can increase customers' trust and, subsequently, click-through rates.

3. Notify users with «Manager» rights of all messages

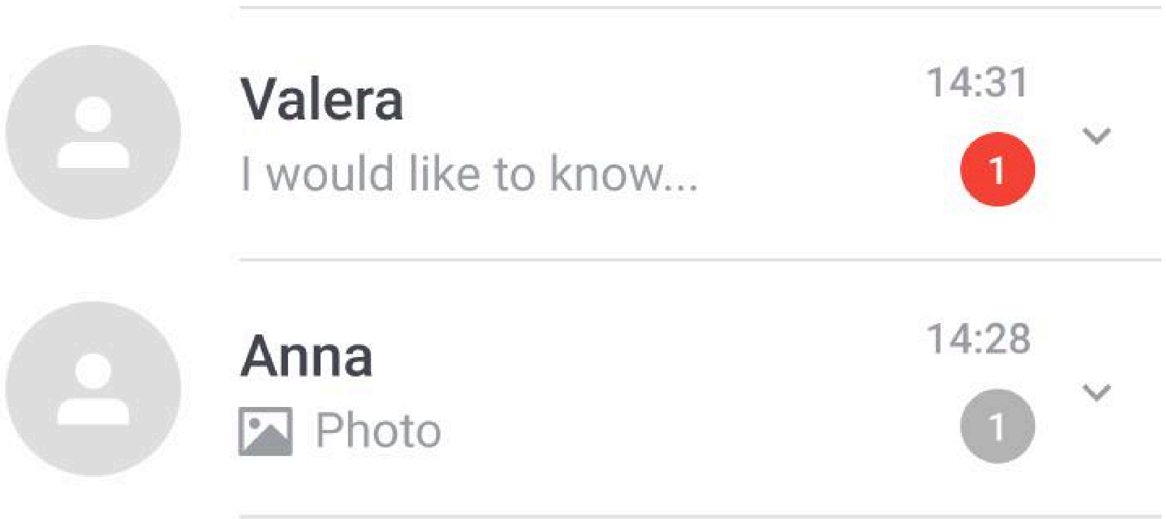
This setting may be useful if there are salespeople with the «Manager» role (set in the «Select employee roles» settings).

Enable this setting if salespeople with the «Manager» role need to be notified about all chats, including those for which they are not responsible.

Customer inquiries will be addressed promptly by the first available team member.

A salesperson with the «Manager» role will receive notifications only for chats they are responsible for. New messages in these chats will have a red numeric icon.

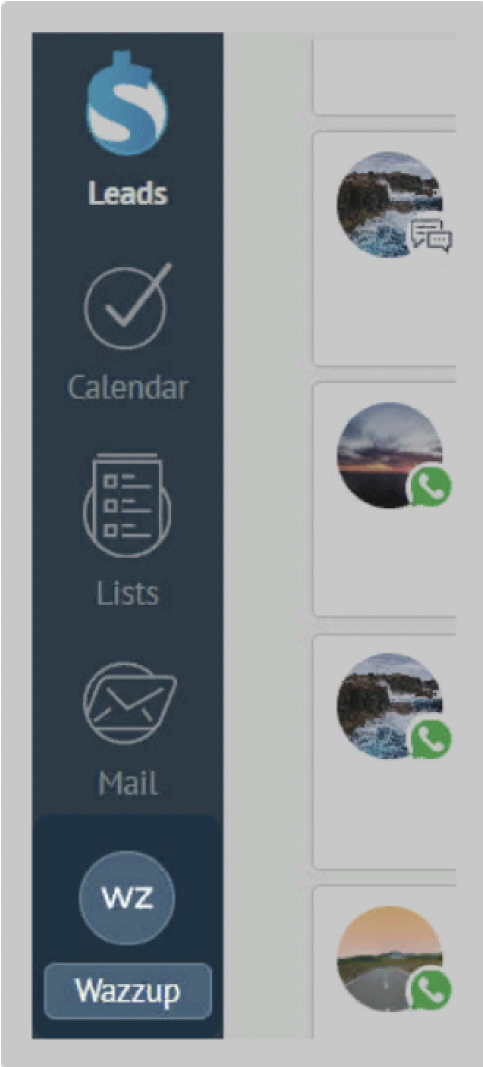
They won't receive any notifications about new messages from chats handled by other salespeople. Incoming messages in these chats will have a gray numeric icon.



It can come in handy for traditional sales teams where the manager not only keeps track of other sales representatives' work but also actively interacts with their own customers.

4. Display the Wazzup widget in the left CRM menu

After connecting the integration, the Wazzup button will appear on the left panel of the Kommo menu. Clicking on it will open chats accessible to the salespeople, but only those managed through Wazzup. Messages from other sources (such as website inquiries) will not be displayed in this list.



Kommo also has its own chats — you can access them by clicking the ImBox widget. It contains correspondence with customers from all sources: social networks, the website, and Wazzup, as well. This is the main difference between Kommo chat functionality and ours.

Widgets can work simultaneously, but this is inconvenient — there is no synchronization between them.

For example: if you mark a message as not requiring a response in ImBox, in our widget it will still be marked red and will remain at the top of the chat list.

To avoid confusion, it's better to disable one of the widgets.

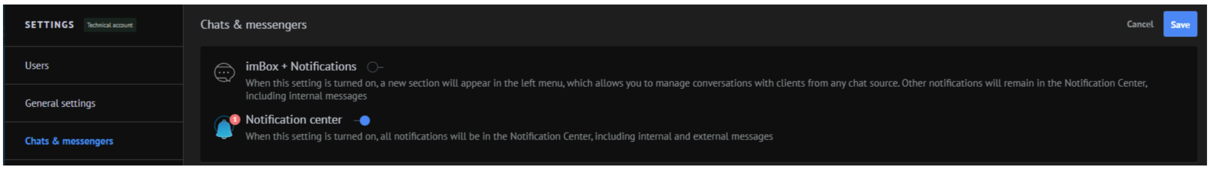
How to hide Wazzup chats from the left menu?

Disable the setting «Display Wazzup widget in the left CRM menu». Once disabled, the Wazzup button with all chats will disappear from the menu. However, the salesperson will still be able to access individual Wazzup chats with specific customers directly from the customer card.

How to disable ImBox chats?

The setting «Display Wazzup widget in the left CRM menu» should be enabled.

Go to amoCRM. Click «Settings» on the left panel of Kommo → «Chats and messengers» → disable the first slider.



5. Priority Channel

This option will only appear if there are employees with access to multiple WhatsApp or Telegram channels.

For each sales representative, select the channel from which messages will be sent by default, if the salesperson contacts the customer first.

3. HubSpot

How to connect HubSpot

Before integration, add Instagram and WhatsApp channels.

1. Go to the «CRM Integration» section in your Wazzup account.

2. In a newly opened window, select «HubSpot».

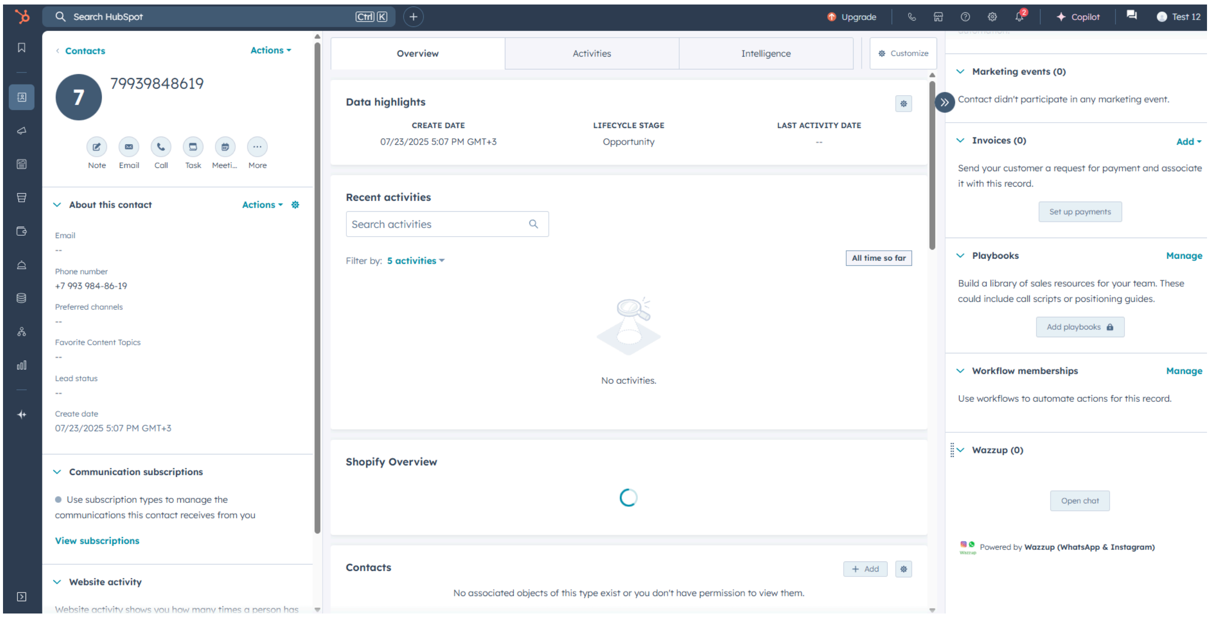
3. Enter the HubSpot domain and click «Continue», then «Connect».

4. Select the HubSpot account for which the Wazzup integration should be connected.

5. Click «Connect the application».

6. Done — the integration with HubSpot is connected.

Now, when new messages arrive, a contact and a deal will be created. In the contact and deal cards, you can open the Wazzup widget with a private chat. If you open this chat from the contact card, it will display the correspondence with that specific contact. If you open this chat from the deal card, it will show the correspondence with all contacts involved in that deal.



To access the general chat where all your chats are displayed, add a general chat button.

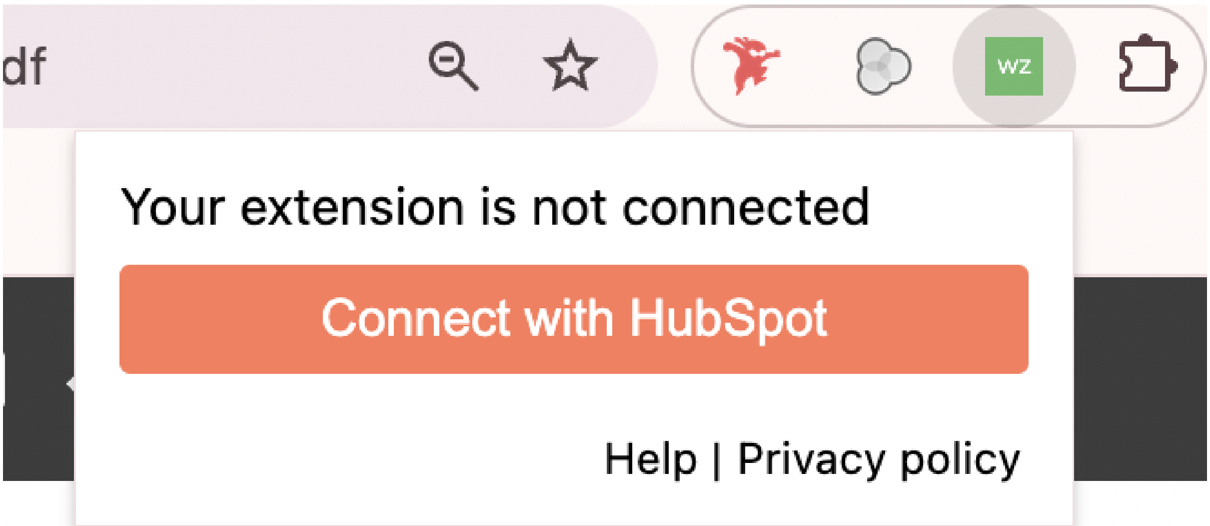
Adding a general chat button

Only users of Chromium-based browsers (Chrome, Opera, Vivaldi, Microsoft Edge, Yandex.Browser, Brave, and Colibri) can add a general chat button.

1. Install the extension from the Chrome web store.

2. Click on the «Wazzup for HubSpot» extension icon in the top browser bar.

3. Click «Connect to HubSpot»:

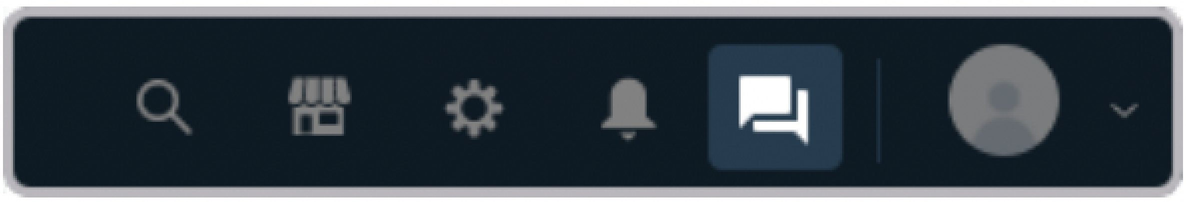


4. Select the Hubspot account where you want to install the extension.

This should be the same account you selected when setting up the integration with Wazzup.

5. Click «Connect the app».

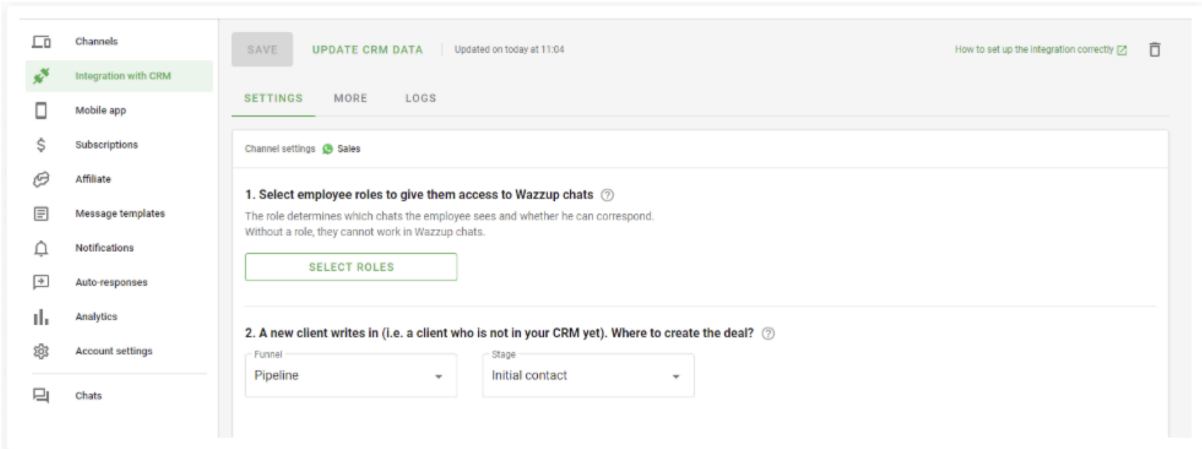
6. Done — you have added a general chat button to the top bar of HubSpot:



To ensure that everything functions correctly, the integration must be customized accordingly.

Configuring the integration with HubSpot

The settings are displayed on the «CRM Integration» tab after connecting the integration. If you have several channels connected, the integration for each channel needs to be configured separately.



1. Specify what should be done when a new customer (not in your CRM yet) contacts you

Select the sales funnel and the specific stage where you want to create a deal. The contact will be created automatically.

2. Select employee roles

The role determines the employee's permissions: which chats they can access and whether they can communicate with customers.

Assign one of the following roles to each employee:

- Quality Control — checks sales representatives' work. They can view all chats but cannot send messages to customers.
- Sales rep — communicates with customers and works with orders. They can only communicate with customers assigned to them in CRM and cannot see or access chats of other sales representatives.
- Manager — manages large deals. They can view and respond to all customer messages, regardless of assignment.

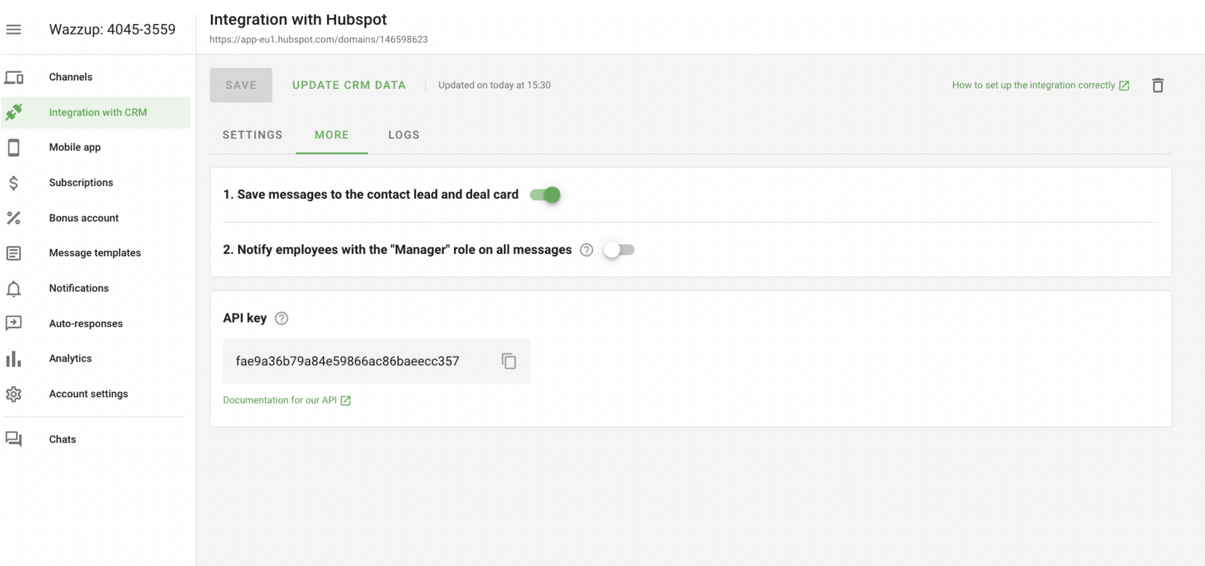
The «Select» button opens a window where you can select employee roles.

The «Receives new clients» toggle grants permission to work with new customers.

When a deal is created in any sales funnel, the sales representative participates in the client distribution process and gains the right to be assigned as the responsible person for that client in the CRM.

Additional settings

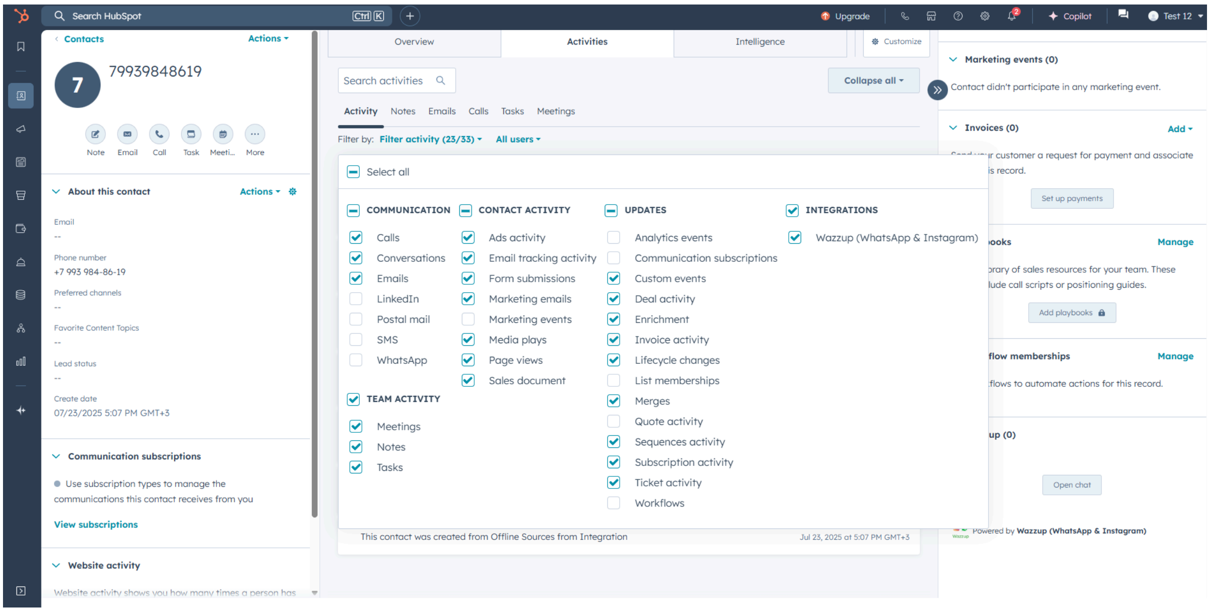
Additional settings apply to all channels.



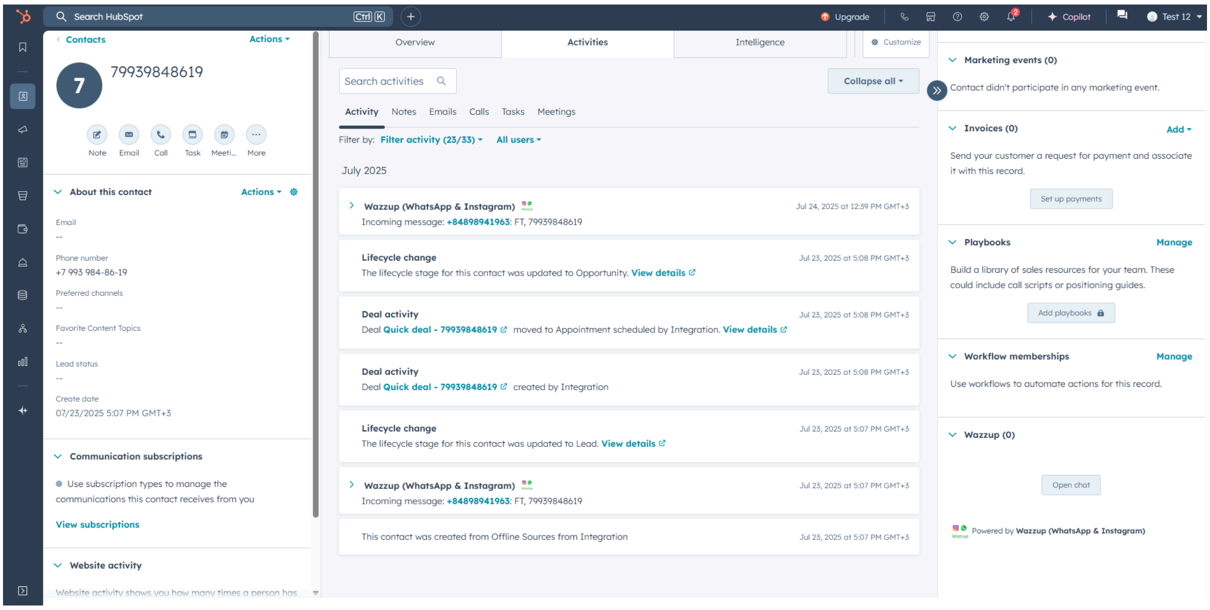
1. Save messages in the Lead, Contact, and Deal feed

Turn this setting on to save messages in the Lead, Contact, or Deal feed.

In HubSpot, go to a Lead, Contact, or Deal card, open the «Feed Filters» window, and check the box next to Wazzup.



From now on, new messages will appear in the activity feed. To view the message content, click the triangle in the upper left corner. Media files and documents in messages in the activity feed are displayed as links.



2. Notify users with «Manager» rights of all messages

If this setting is enabled, employees with the «Manager» role will see the total number of unanswered messages of both managers and other salespeople. It will be displayed on the button that opens the chat window with all conversations. Additionally, managers will receive push notifications in the mobile app for all customers, including those they are not responsible for in the CRM.

If this setting is disabled, employees with the «Manager» role will only see the number of unanswered messages from customers they are assigned to in the CRM. They will also receive push notifications only for those customers they are responsible for.

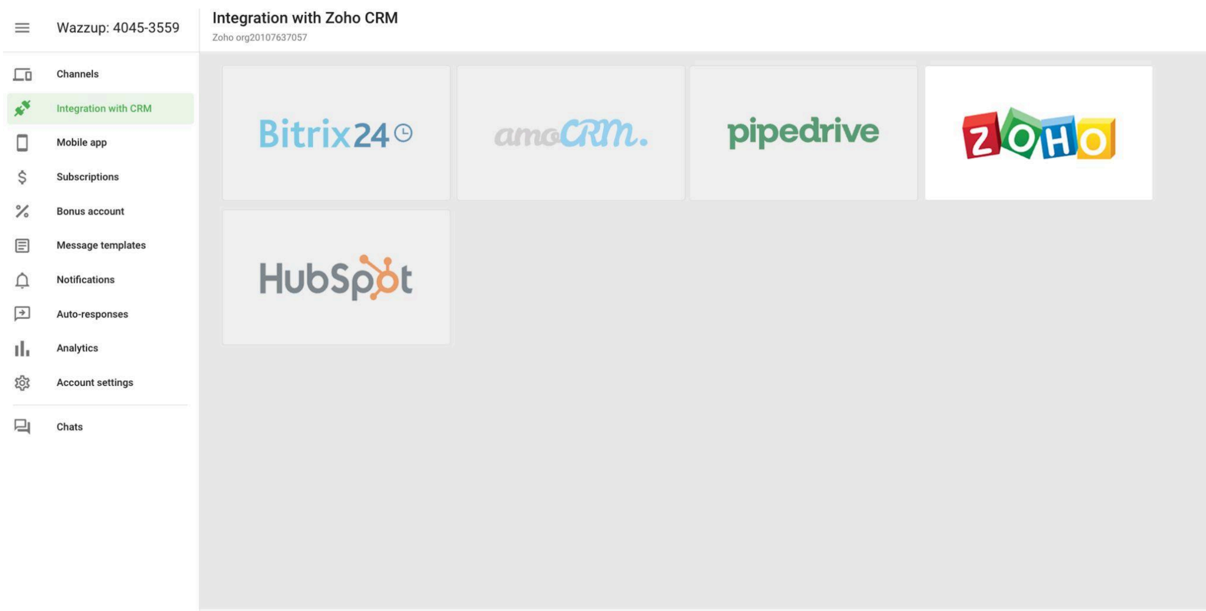
4. Zoho CRM

How to connect Zoho CRM

Wazzup integration is available for:

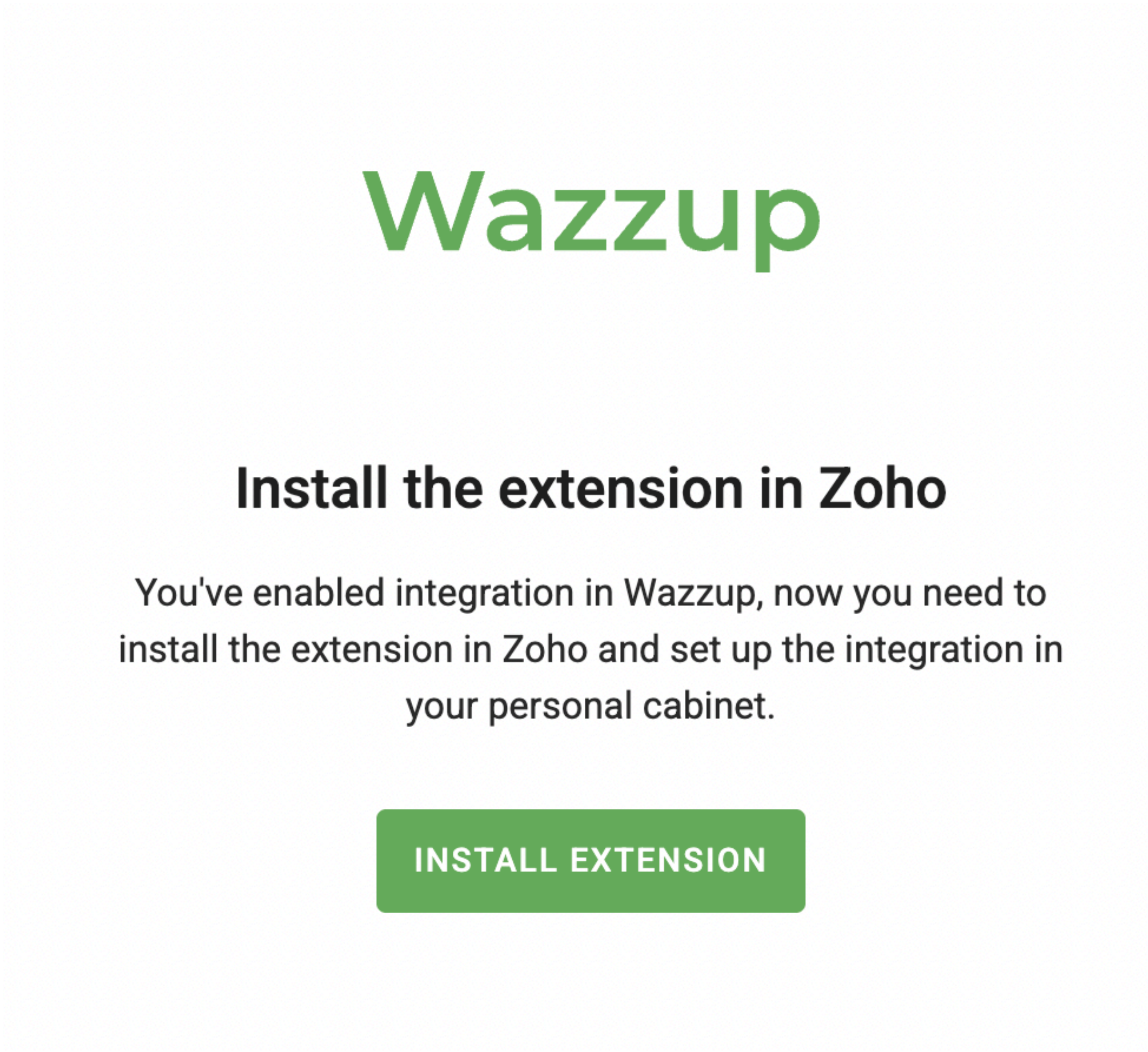
- users of Zoho CRM Enterprise, Ultimate, Plus tariff plans;
- users of Zoho One or other Zoho products that include Zoho CRM with the functionality of Enterprise, Ultimate, Plus tariff plans.

1. Click on the Zoho icon in the «CRM Integration» section of the Wazzup personal account:



2. Paste the link to your Zoho CRM account and click «Continue» → «Connect».
3. In a new window, click «Accept» to grant necessary permissions to Zoho.

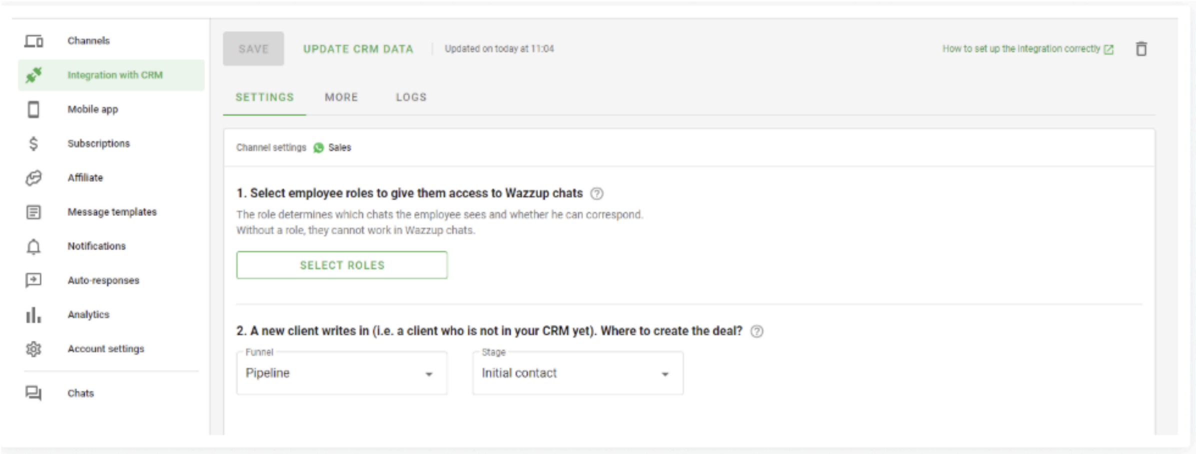
4. Click the link to install the Wazzup extension in Zoho CRM:



5. Agree to the terms of use and data provision. Click «Continue».
6. Select the users who will have access to the extension in the account: only administrators, all users, or only specific users. Click «Confirm».
7. Done — the integration with Zoho is connected.

Setting up Zoho CRM integration

The settings are displayed on the CRM Integration tab after connecting the integration. If you have multiple channels connected, you need to set up the integration for each channel separately.



1. Specify what should be done when a new customer (not in your CRM yet) contacts you

To create a deal, select the funnel name in the left drop-down list — «Standard», and the stage name in the right drop-down list. When you create the deal, the contact will be generated automatically.

To create a lead, select «Lead» in the left drop-down list, and its status in the right drop-down list.

2. Select employee roles

The role determines the employee's permissions: which chats they can access and whether they can communicate with customers.
Assign one of the following roles to each employee:

- Quality Control — checks sales representatives' work. They can view all chats but cannot send messages to customers.
- Sales rep — communicates with customers and works with orders. They can only communicate with customers assigned to them in CRM and cannot see or access chats of other sales representatives.
- Manager — manages large deals. They can view and respond to all customer messages, regardless of assignment.

The «Select» button opens a window where you can select employee roles.
The «Receives new clients» toggle grants permission to work with new customers.
When a deal is created in any sales funnel, the sales representative participates in the client distribution process and gains the right to be assigned as the responsible person for that client in the CRM.

Additional settings

1. Save messages in lead, contact, and deal cards
To view saved messages, go to the Wazzup Log section on the left panel of a lead, contact, or deal card in Zoho CRM.
If this setting is disabled, the Wazzup Log section on the left panel will be present, but messages will not be displayed there.

2. Notify users with «Manager» rights of all messages
Employees with the «Manager» role will receive push notifications in the mobile app for all customers, including those they are not responsible for in the CRM.
If this setting is disabled, employees with the «Manager» role will only see the number of unanswered messages from customers they are assigned to in the CRM. They will also receive push notifications only for those customers they are responsible for.

3. Set priority channel
This option will only appear if there are employees with access to multiple WhatsApp or Telegram channels.
Specify which channel will be used to send a message if an employee is the first to message a customer.

Step 3. Pay for a subscription

After registration, you'll have a 3-day trial period free of payment. To continue using the service, simply add a subscription and complete the payment process.

How to create a subscription

For WhatsApp, Telegram, Instagram and Avito

1. Go to the «Subscriptions» section in your Wazzup account → click «Add subscription».
2. Select WhatsApp, Telegram, Instagram or Avito.
3. Enter the number of channels and select a tariff plan.
4. Select the subscription period. The longer the subscription period, the lower the price per channel for each day of use → click «Continue».
5. Select a payment method. When paying with a bank card, auto-renewal will be enabled so that the service does not turn off unexpectedly.
6. Done — the subscription is created.

For WABA

1. Go to the «Subscriptions» section in your Wazzup account → click «Add subscription».
2. Select WABA.
3. Select the subscription period and how many numbers you wish to have. The longer the subscription period, the lower the price per channel for each day of work → click «Continue».
4. Enter the amount you want to add to your subscription balance.
5. Select a payment method. When paying with a bank card, auto-renewal will be enabled so that the service does not turn off unexpectedly.
Please note that auto-renewal is only available for subscription payments; you cannot set up automatic balance replenishment.
However, you can enable notifications to alert you when your balance is running low to make sure that you always have enough money.
6. Done — the subscription is created.

For Telegram Bot

For Telegram Bot a free subscription is automatically created. If the conditions of a free subscription (up to 500 dialogs per month) do not suit you, you can buy a subscription with Pro rate and correspond without restrictions.

1. Go to the «Subscriptions» section in your Wazzup personal account → Click «Add subscription».
2. Select Telegram Bot.
3. Select the subscription period and how many numbers you wish to have. The longer the subscription period, the lower the price per channel for each day of work → click «Continue».
4. Select a payment method. When paying with a bank card, auto-renewal will be enabled so that the service does not turn off unexpectedly. Please note that auto-renewal is only available for subscription payments; you cannot set up automatic balance replenishment.
However, you can enable notifications to alert you when your balance is running low to make sure that you always have enough money.
5. You have created a subscription. Now you need to remove channels from the free subscription and transfer them to the paid plan.
In the line with the free subscription, click ⁝ and select «Channels in the subscription».
6. Click on the minus icon in the right column of the channel you want to remove from the subscription → click «Save».
7. Return to the paid subscription, click ⁝ → «Channels in subscription».
8. Add the desired channels, click «Save».

How auto-renewal works

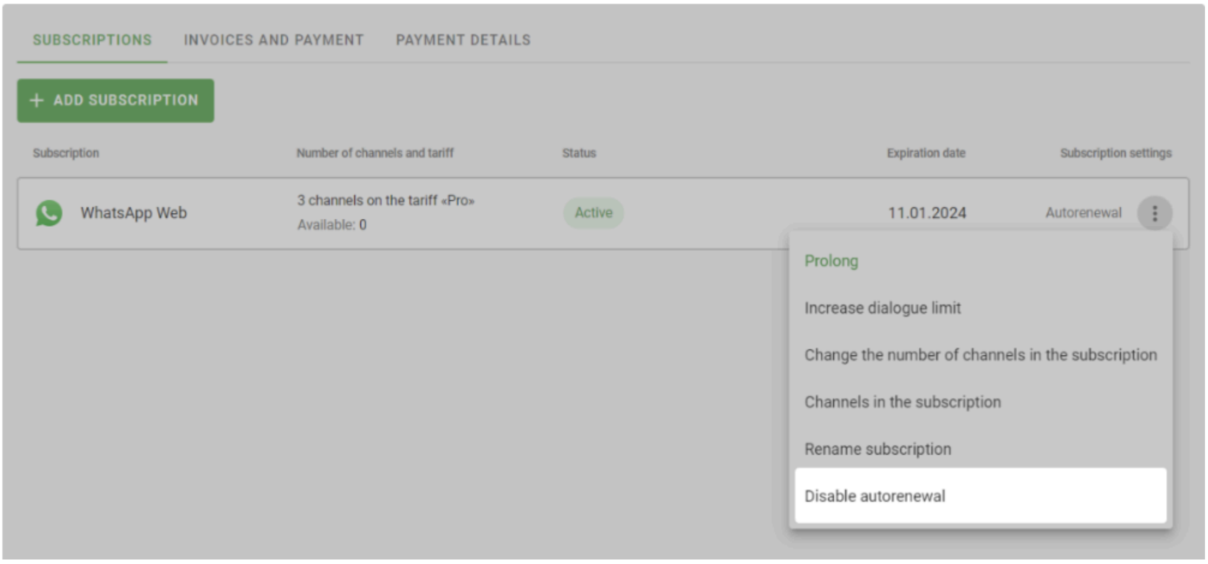
Auto-renewal is enabled when you pay for the service with a card. The next payment is deducted two hours before the end of the subscription. We renew the service for the period of the last subscription at the same tariff.

If you choose to turn off auto-renewal:

1. Go to the «Subscriptions» section.

2. Click on the three dots ⁝ in the line with the required subscription → Disable autorenewal.

3. Turn off the setting → Save.



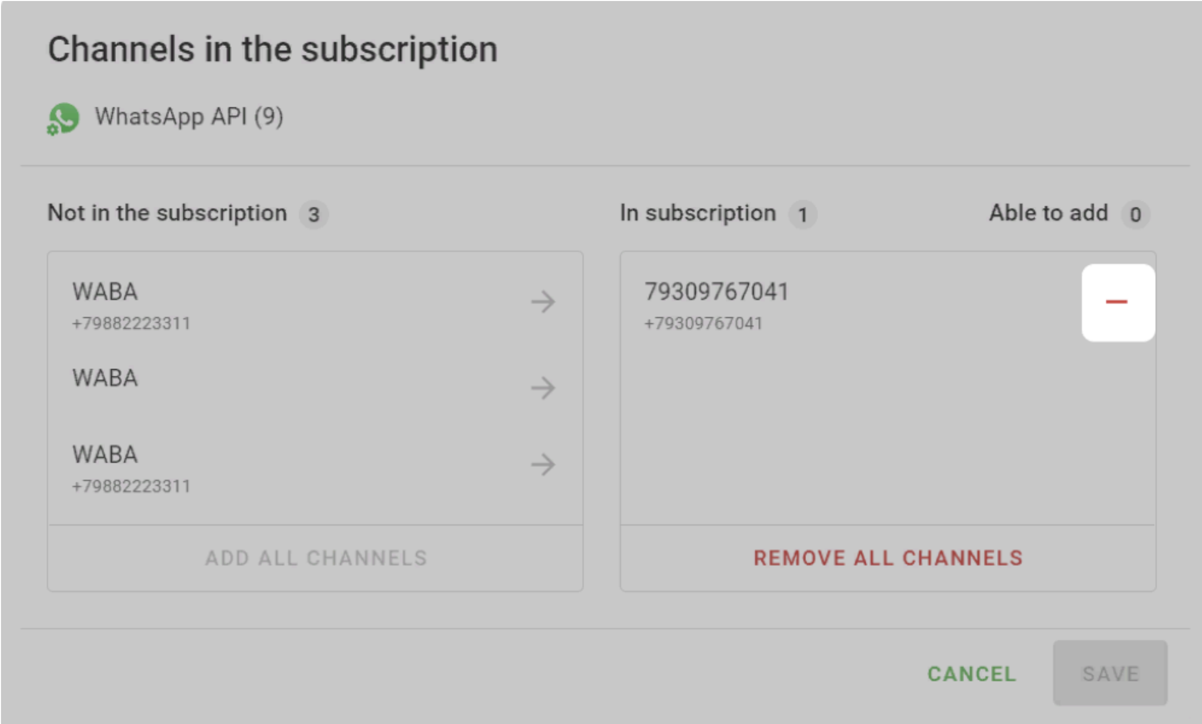
How to add another channel to your subscription

Channels will be added to the subscription automatically after payment. For example, if you have 2 WhatsApp channels in your account and you add a subscription to 1 channel, Wazzup will randomly select a channel and add it to your subscription.

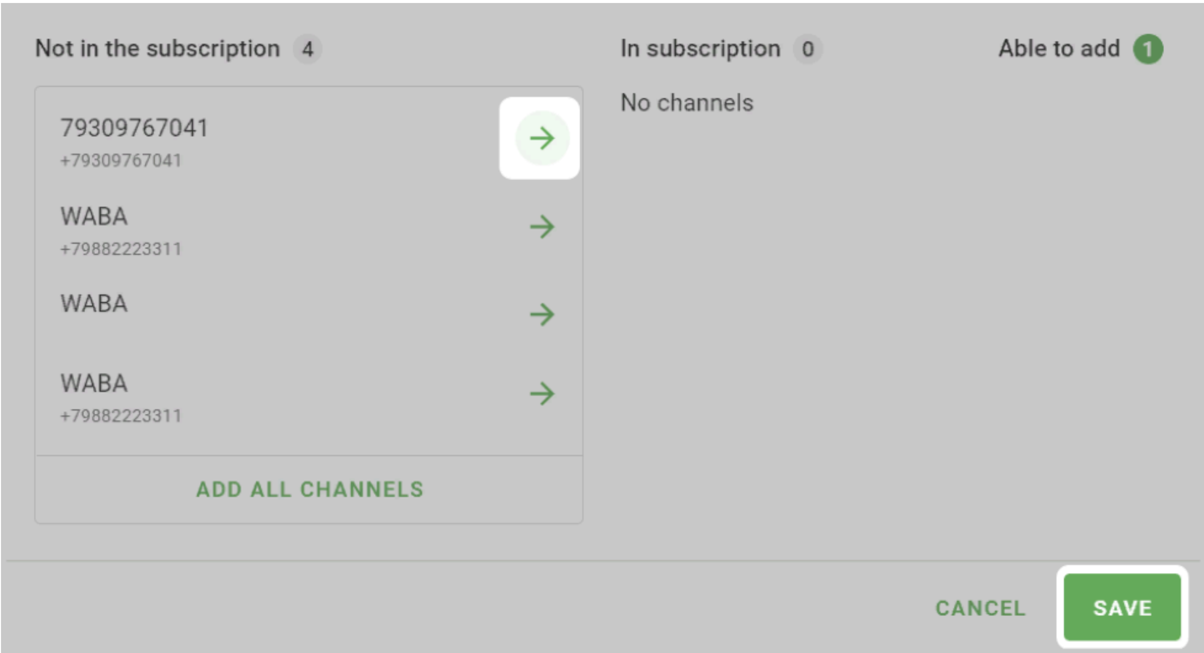
To change a channel in the subscription:

1. In the subscription line, press ⁝ and select «Channels in the subscription»:

2. Click on the minus in the right column of the channel you want to remove from the subscription:



3. Click on the arrow in the left column of the channel that you want to add to the subscription → «Save».



How to change the number of channels in a subscription

1. Go to the «Subscriptions» section in your Wazzup account.

2. Click ⁝ to the right of the subscription and select «Change the number of channels in the subscription».

3. Enter the new number of channels. For example, if you subscribe to 1 channel and want to add 4 more channels, enter «5» in the field. If you have 5 channels and want to remove 4 channels, enter «1» in the field.

4. Click «Continue» or «Change» depending on whether you are increasing or decreasing the number of channels.

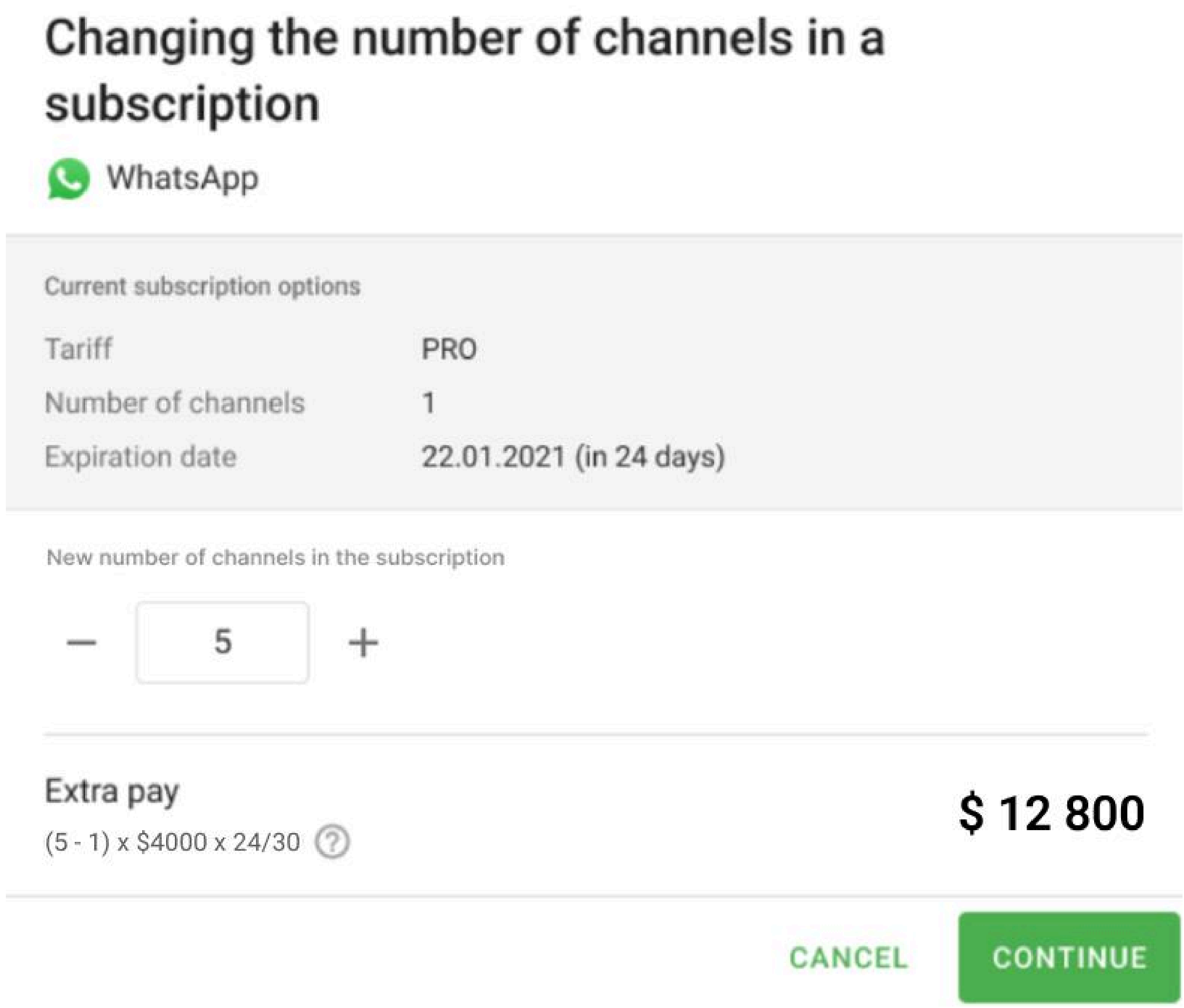
5. If you increase the number of channels, select the payment method and pay the required amount.

Done. You have changed the number of channels in your subscription.

How is the surcharge calculated when the number of channels is increased?

The surcharge is calculated based on the remaining days until the end of the current subscription.

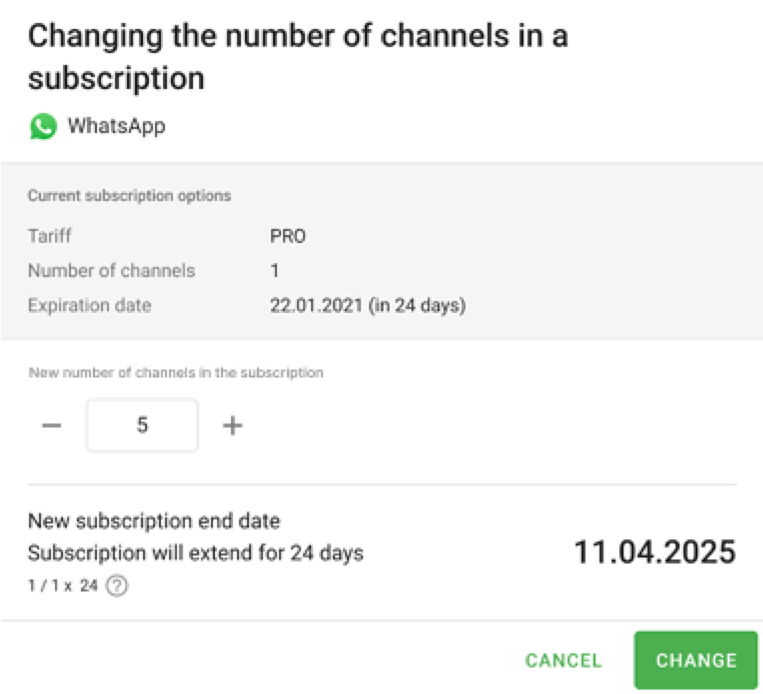
For example, you've paid for a 6-month «Pro» tariff plan and have 24 days left until your subscription expires. If you add one more channel, you will be charged for that additional channel's usage over the remaining 24 days.



How is the new subscription period calculated when the number of channels is decreased?

It is calculated how many days were paid for the channels removed from the subscription, then the subscription period is extended by the same number of days.

For example, you have initially paid for a subscription with 6 channels and have 24 days left until the end of the subscription. If you decide to remove 1 channel, your subscription will be automatically extended by 24 days.



How to increase the chats limit in a subscription

To increase the chats limit, you need to switch to another plan. Simply renewing your current subscription at the same tariff will not change the limit. The dialogue counter resets automatically each month on the 1st day, regardless of your payment date.

1. Go to the «Subscriptions» section in your Wazzup account.

2. Click ⋮ to the right of the subscription and select «Increase dialogue limit».

3. Select a new tariff plan and click «Continue».

4. Choose a payment method and pay the difference in price for the remaining subscription period.

Done. You have increased the chats limit.

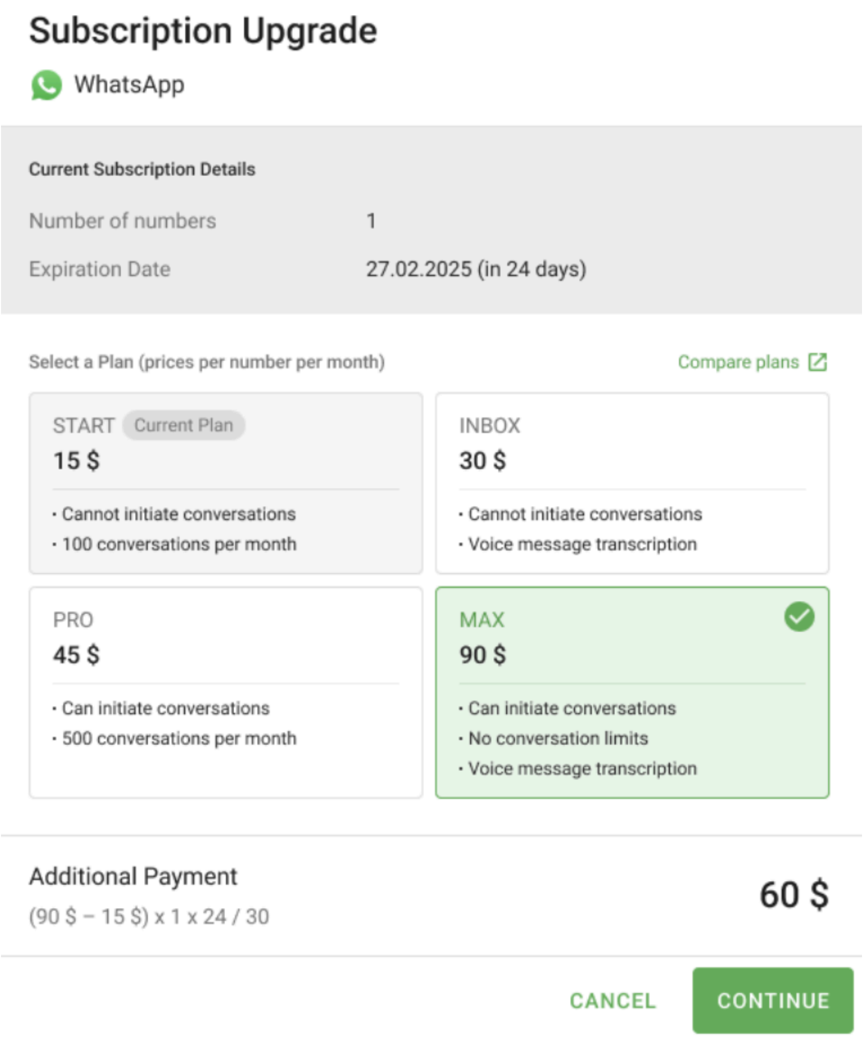
How the surcharge is calculated when the tariff plan is changed

In the example, the surcharge is calculated according to the formula ($90 – $15) x 1 x 24 / 30, where:

($90 – $15) — difference in cost of tariffs

1 — channels in the subscription

24 / 30 — days left until the end of the subscription



How to choose a tariff plan

Tariffs for WhatsApp, Telegram Personal, Viber

	Start	**Inbox**	**Pro**	**Max**
Ability to initiate a chat	+	-	+	+
Number of dialogues	50	500	500	no limits
Group chats	-	-	+ (not available in Viber)	+ (not available in Viber)
Voice transcription	-	-	-	+
Price in dollars and	15	30	45	90

euros per month				

Tariffs for Telegram Bot channels

	Free	**Max**
Ability to initiate a chat	-	-
Number of dialogues	500	no limits
Voice transcription	-	+
Price in dollars and euros per month	0	45

Tariffs for Instagram

	Inbox	**Max**

Ability to initiate a chat	-	-
Number of dialogues	500	no limits
Voice transcription	-	+
Price in dollars and euros per month	30	45

Selecting a plan for the WABA channel is simple — there's only one. The plan is called WABA:

- you can initiate a chat,
- the number of dialogues per month is not limited,
- voice transcription is available.

How to choose a tariff plan

Step one: When selecting a tariff for WhatsApp, Instagram, or Telegram Personal channels, determine whether you need to initiate chats with customers. If you plan to message customers first, the Inbox tariff will not be suitable for you.

Step two: Calculate how many leads you have per month. The number of leads must be less than the number of dialogues on the tariff, otherwise, you will not be able to correspond with all customers from Wazzup.

A dialogue is a chat with at least one outgoing message. For example, if you initiate contact with a customer, all your correspondence with them until the end of the month counts as one dialogue.

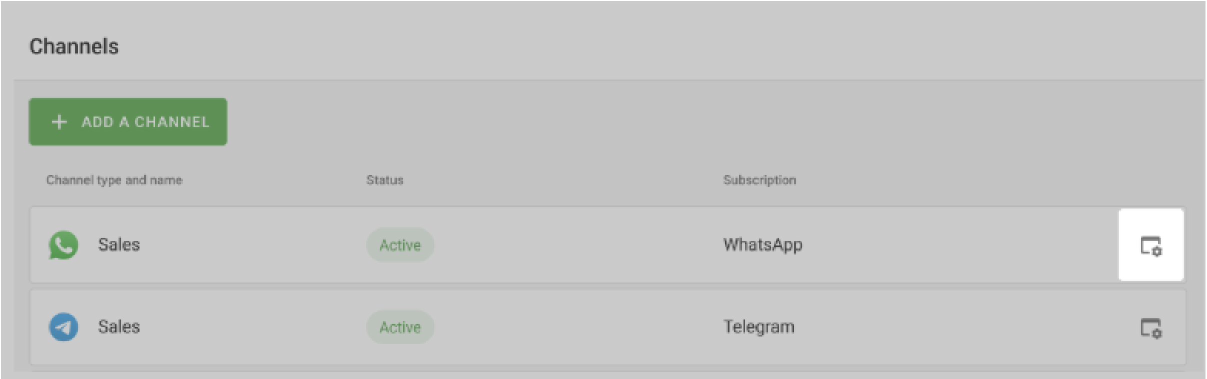
For example, if you connect WhatsApp and have an average of up to 500 leads per month, the Pro tariff will suit you. If your leads exceed this number, the Pro plan may not be sufficient, and it’s better to choose the Max tariff.

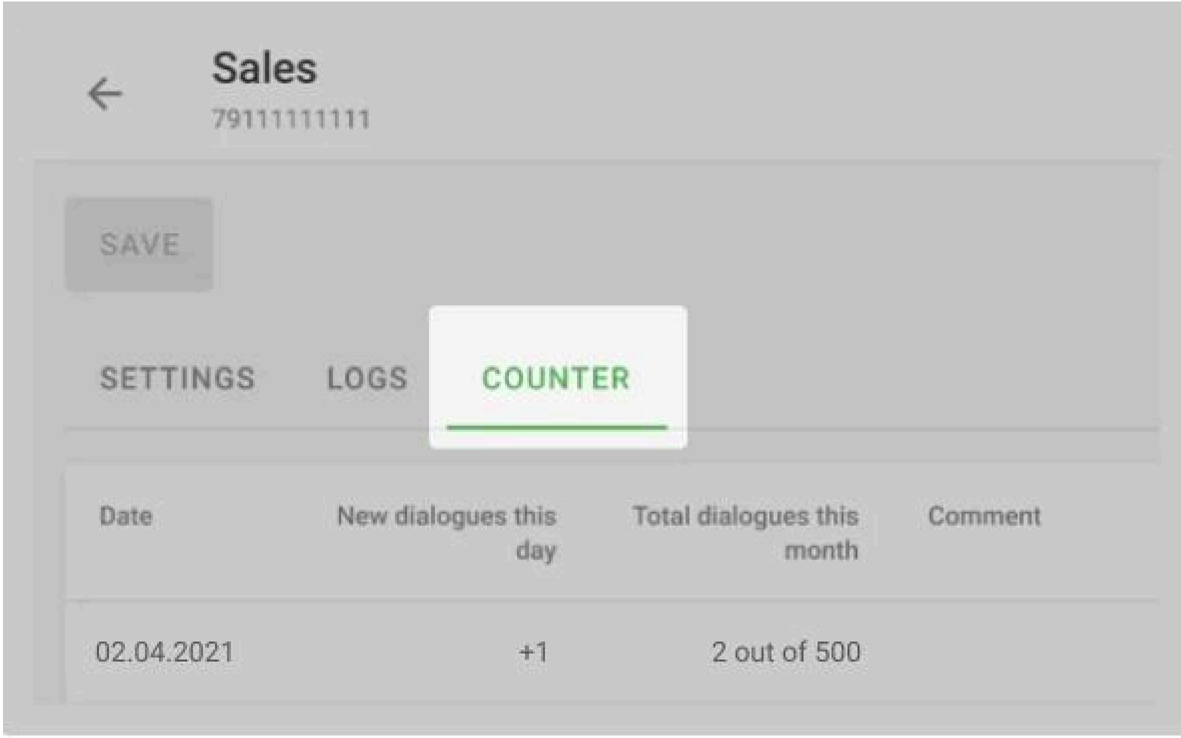
You can purchase the selected tariff for one month, six months, or a year. Paying upfront for six months grants a 10% discount, while a full year offers a 20% discount. Current prices are available on the Wazzup website. You can also see them when adding a subscription in your account.

How to check if there are enough dialogues left?

You can monitor your dialogue usage in your Wazzup personal account under the channel settings: «Channels» → Go to the channel card → «Counter» tab.

The column on the right shows the number of new dialogues per day, and on the left — how many dialogues there are in total this month. If you are approaching the dialogue limit, a recommendation to upgrade to a higher tariff will appear in the «Comment» column.





Will I overpay if I upgrade to a higher tariff?

No, you won't overpay. When switching to a higher tariff, you only pay the difference in cost for the remaining period of your current subscription — not for the entire month.

Please note: if you extend your current tariff in the middle of the month, it will not immediately increase your dialogue limit. The dialogue counter will be updated only at the start of the next month. To add more dialogues, you need to change your tariff plan.

How to pay for the service

Go to the «Subscriptions» section of the Wazzup personal account, click «Add subscription». Select the desired messenger, the number of channels, the tariff and the period of use of the service you want to pay for.

WABA billing

The subscription payment is a recurring fee for using the service. Subscription costs are:

90 $ (90 €) when paying WABA for a month,
81 $ (81 €) per month when paying WABA for 6 months,
72 $ (72 €) per month when paying WABA for a year.

The WABA plan includes CRM integration, all Wazzup features, and unlimited dialogues — you can communicate with any number of customers each month.

Correspondence payments

To start a conversation with a new customer, you need to send a WABA template. Templates can also be used during ongoing conversations, such as in automation or when communicating via bots.

Meta charges for sending templates (with some exceptions — more details below). The cost of a template depends on two factors:

the customer's country (determined by their phone number code)
the template category

There are three template categories:

Marketing — Promotional messages, special offers, feedback requests, new product announcements.

Utility — Order confirmations, notifications, reminders, responses to customer inquiries (if sent outside service hours). In the Wazzup interface, this category is labeled as «Notifications, reminders, customer questions».
Authentication — One-time passwords for login verification.

What you can send for free:

When a customer messages you first, a 24-hour conversation window opens. Within this active conversation, you can send the following for free:

Regular messages or Wazzup templates (since they're sent as simple messages)
«Utility» category templates (but only within the active 24-hour session — once the session ends, sending «Utility» templates becomes chargeable again)
WABA templates containing only text or text with quick reply buttons. Here's the magic of our service: they will be sent as regular messages, so Meta won't charge you for these templates.

The cost for sending templates is deducted in the currency set in your personal account.

Price in dollars

Country	Template from "Alerts, reminders, questions for clients" category, $	Template from "One-time passwords" category, $	Template from "Marketing" category, $

Argentina	0,04452	0,04805	0,08091
Brazil	0,01047	0,04124	0,08183
Chile	0,02619	0,069	0,11639
Colombia	0,00026	0,01008	0,01637
Egypt	0,00681	0,00681	0,14049
France	0,03928	0,09047	0,18749
Germany	0,07201	0,10055	0,17872
India	0,00183	0,00183	0,01401
Indonesia	0,02619	0,03928	0,05381

Israel	0,00694	0,02213	0,04622
Italy	0,03928	0,04949	0,09047
Malaysia	0,01833	0,01833	0,1126
Mexico	0,01309	0,03129	0,05708
Netherlands	0,06546	0,09427	0,20909
Nigeria	0,00877	0,00877	0,06756
North America	0,00524	0,01768	0,03273
Pakistan	0,00707	0,00707	0,06193
Peru	0,02619	0,04936	0,09204

Russia	0,05237	0,05617	0,105
Saudi Arabia	0,01506	0,01506	0,05957
South Africa	0,00995	0,00995	0,04962
Spain	0,02619	0,04478	0,08052
Turkey	0,00694	0,01087	0,01427
United Arab Emirates	0,02056	0,02056	0,05028
United Kingdom	0,0288	0,04687	0,06926
Rest of the Middle East	0,02056	0,02331	0,04465

Rest of Western Europe	0,03928	0,04949	0,07751
Rest of Latin America	0,01479	0,05826	0,09689
Rest of Central & Eastern Europe	0,04622	0,07293	0,1126
Rest of Asia-Pacific	0,02056	0,05564	0,09584
Rest of Africa	0,00524	0,01885	0,02946
Other	0,01008	0,0398	0,07908

Where the funds are deducted from?

Your WABA subscription has an associated balance. When you send a template, the payment is automatically deducted from the balance in your Wazzup account currency.

You won't need to make any manual payments or wait for transaction processing — just ensure you have sufficient funds in your balance. Enable notifications in your account — we'll alert you when your balance is running low.

How can you save money on service fees?

1. Share your referral link with friends, colleagues, and others who might benefit from our service. They will receive a $10 or €10 bonus in their account.

2. Earn 20% of the payments made by everyone who registers in Wazzup through your referral link. We'll credit you with bonuses within the year starting from the date of your friend's registration.

3. The best part — you can use these bonuses to pay for the service, helping you save even more!

Here is an example of how much you can save:

If a friend pays for 2 WhatsApp channels on the Pro tariff for six months — you will get 98,4 dollars on your bonus account. You can use these bonuses to enjoy two months of WhatsApp on the Pro tariff for free, and you'll still have enough left for another subscription.

How to pay for the service with bonuses

You can use bonuses to pay for a part of your subscription or the whole subscription. To do this, check «Use bonuses» when adding a subscription.

Step 4. Setting up automation

1. Kommo

How to message a customer on WhatsApp and Telegram using Salesbot
Salesbot is a bot that can be programmed to perform certain actions.

For example, if you haven't had any communication with a customer yet, you can initiate it using Salesbot.

In this article, we focus only on sending messages via WhatsApp, WABA, and Telegram. Instructions for sending messages on Instagram via Salesbot are provided in a separate guide.

How to create a bot

1. Go to the «Deals» section → open the desired funnel→ click «Configure» at the top right corner.

2. Click on the empty cell at the stage at which the bot should be triggered → select Salesbot.

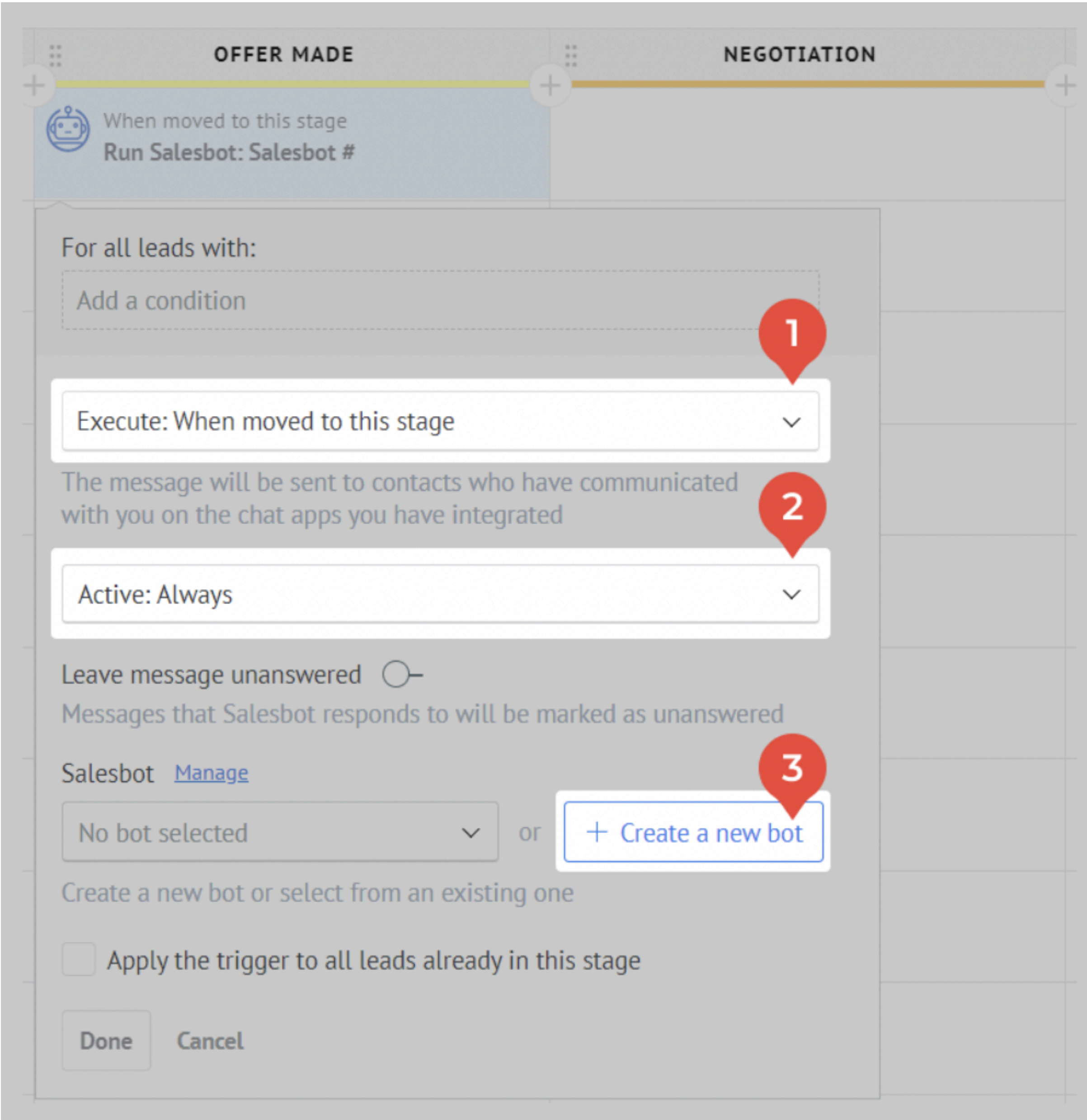
3. The bot settings will open. Select:
- the event (trigger) that will activate the bot,
- the triggering time.

You can also specify a condition to determine when the bot will send a message to the contact from the deal.

In our example, the bot will be triggered when the deal moves to the «Negotiations» stage.

It will always be triggered if a deal moves to that stage. This applies to all deals.

Then click «+ Create new bot».



4. The bot editor will open. In the «Your Bots» panel, select «Create your own bot».

How to set up a bot to send messages

You have created a bot. Now select a method for sending messages:

- standard amoCRM methods,
- via the Wazzup widget in Salesbot.

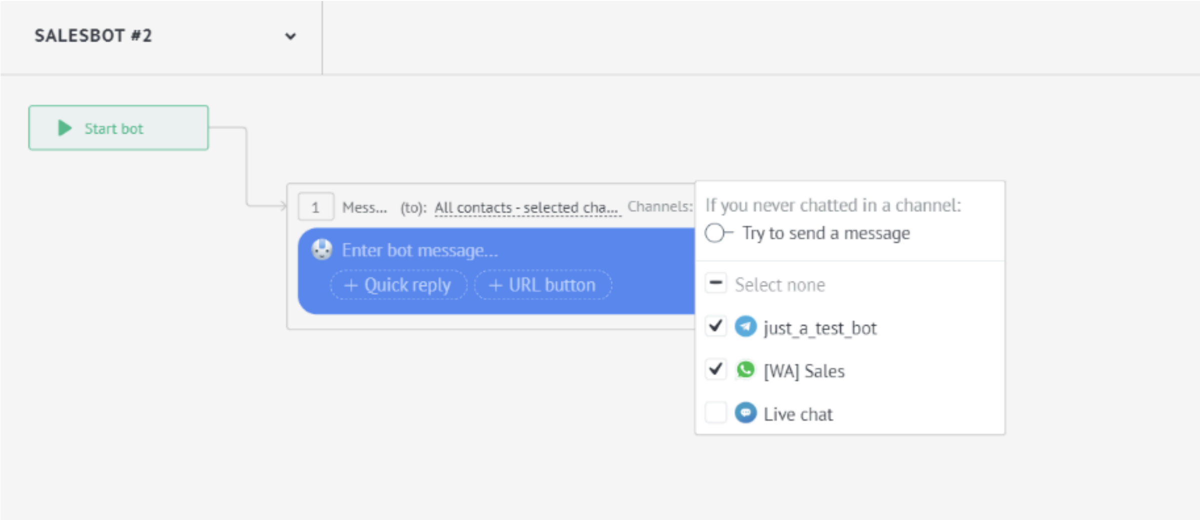
What is the difference between the widget and the standard Salesbot steps:
Salesbot steps send a message to the main contact in the card to all their numbers. For example, if you've texted a customer from two different WhatsApp numbers, Salesbot will send the same message to both numbers at the same time.

The Wazzup widget in Salesbot sends a message to the client number and messenger that you specify in the settings.

There is also a difference for WhatsApp Business API (WABA) users. Only the template code can be submitted through the Salesbot steps. The client will receive the message in the usual form, but it is not very convenient to fill in the variables in the code. And in our widget there is a template preview.

How to send a message using Salesbot steps

From the «Add next step» list, select «Message». The bot will send a message, and if there is no chat with the client, it will create a new chat.

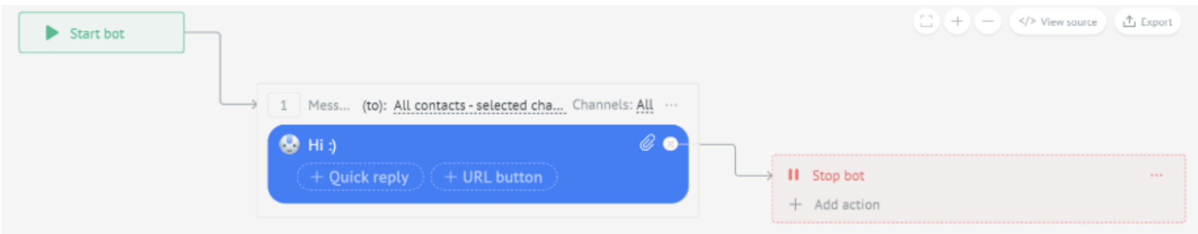


In the settings of the «Message» step, you can select a channel to send the message from. To do this, click on «Channels» and tick the necessary one. If not, the bot will send a message from all channels.

2. Send a message to the customer.

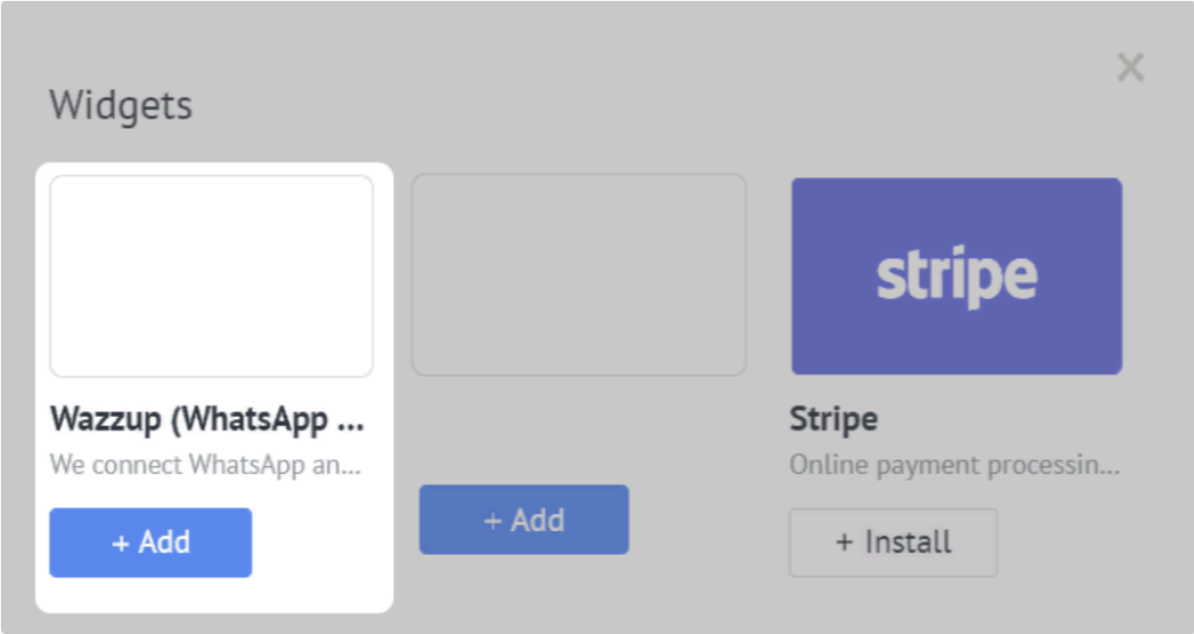
3. Select «Stop bot» as the next step.

You get a bot like this:

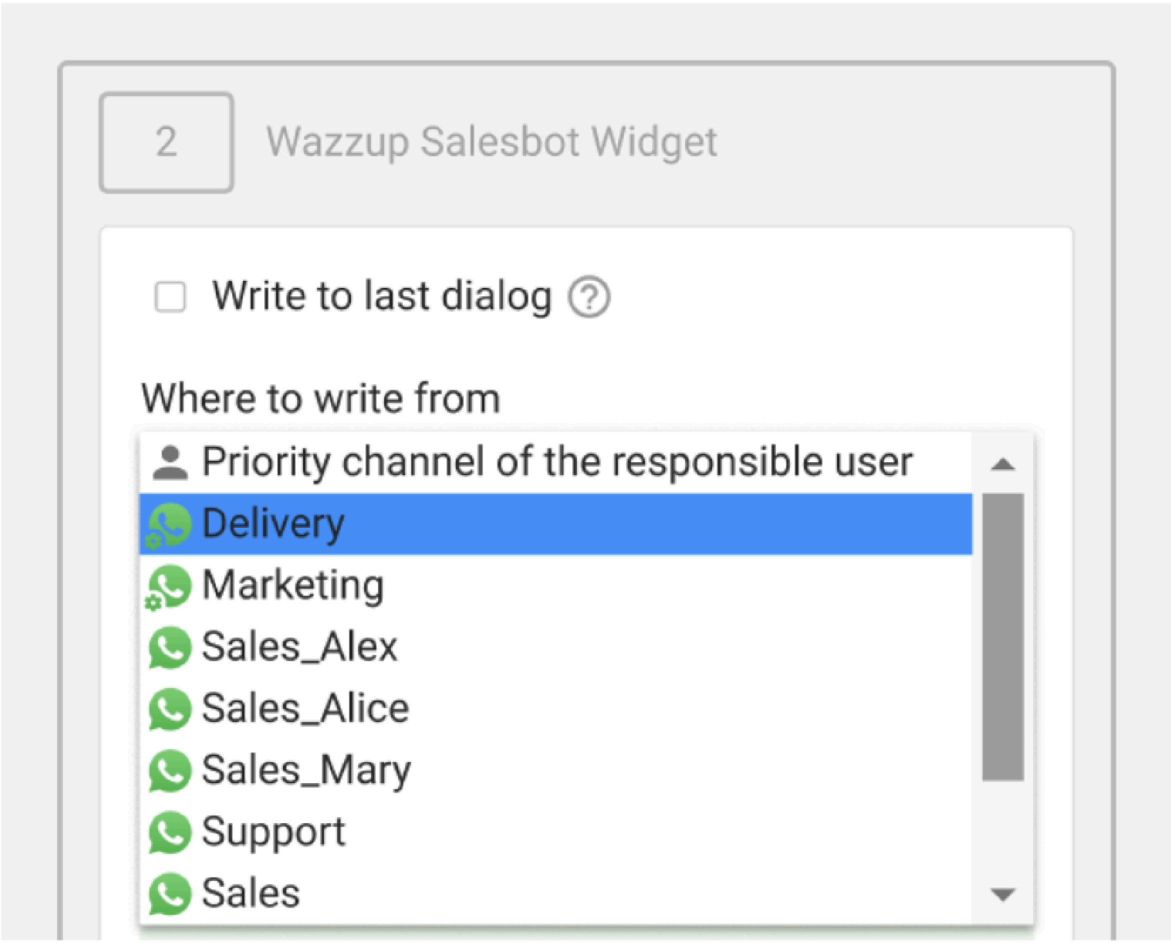


How to send message using the Wazzup widget in Salesbot

1. In the «Add next step» panel, select «Widget» → find Wazzup → «+ Add».



2. Choose a channel you want to send a message from. This determines where the message will go.



If you check «Send a message to the last dialog», the message will go to the dialog where the last incoming or outgoing message was, including automatic messages. The message will go to the same customer number or username, using the same channel as the previous interaction.

If there is no dialogue, the message will be sent from the channel selected in «Where to send a message from if there are no dialogues». It will go to the main contact in the lead, if it is specified, or to the first number, username in the lead card.

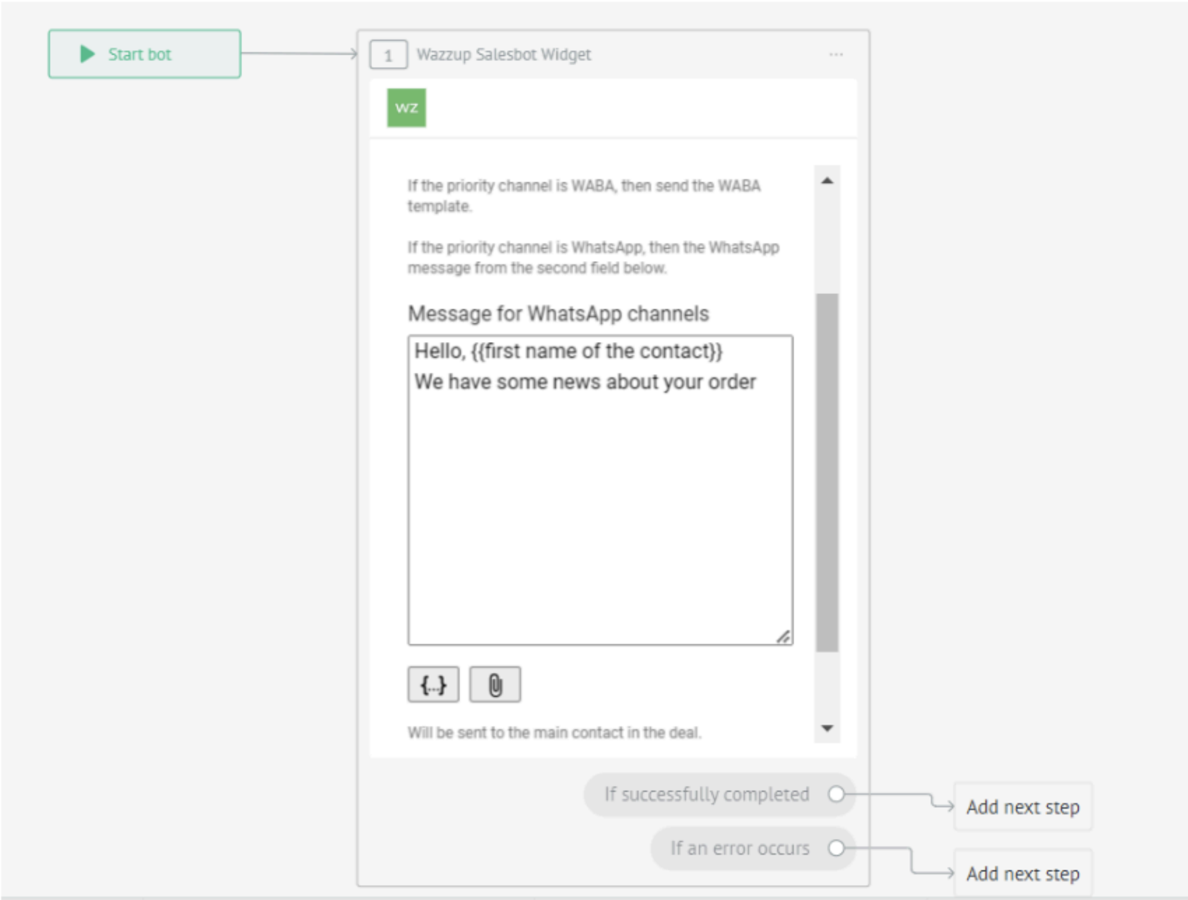
If you leave the box unchecked and select a channel in the "Where to send a message from" section, messages will be sent to the primary contact listed in the lead — if specified — or to the first phone number or username in the lead card. It doesn't matter whether there was any prior correspondence with the customer or not.

When sending messages on Telegram, the system first attempts to create a chat using the username. If the username is not specified, the phone number is used instead. This approach helps prevent your account from being blocked, as Telegram may restrict sending messages by phone number if done more than once every three minutes.

3. Create a message that will go to the customers.

From a WhatsApp or Telegram channel, you can send a text message with an attached image, video, document.

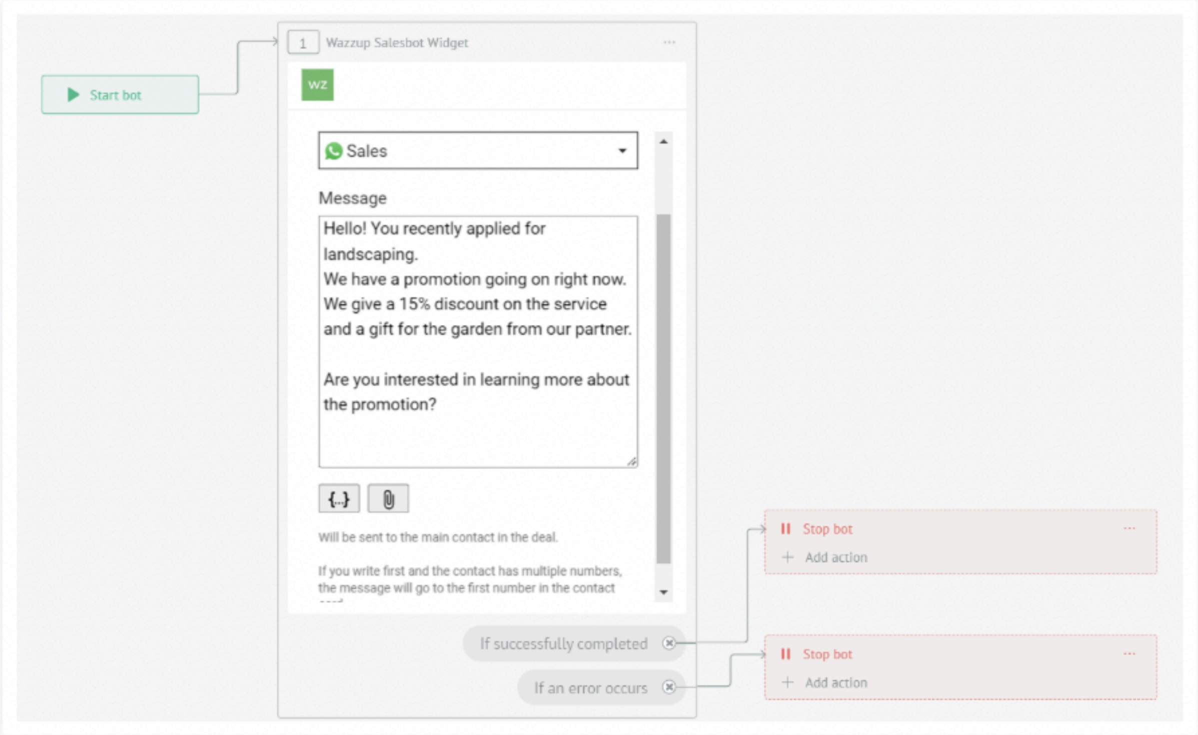
You can add a variable from CRM to the message. For example, customer name or order number. To do this, click on the {...} button below the message field.



You can send a template only from the WABA channel. The list will display all templates available in your personal account.

Fill in the variables manually or insert data directly from your CRM system. To automatically load data from CRM into the message, click on the arrow next to the desired variable → select the field from which you want to retrieve information.

Attach a file if you have a template with media files.



You may have both a message input field for WhatsApp and Telegram channels and a list of WABA templates displayed. This happens if you have different channel types and you want to send a message from the priority channel or to the last chat.

Fill in both fields. If the message is sent from the WhatsApp or Telegram channel, Salesbot will get that it should send the text from the “Message for WhatsApp and Telegram channels” field. If sent from the WABA channel, the bot will deliver the selected template. Messages will only be sent from one channel at a time, not both simultaneously.

4. In the next step, select «Stop bot» in the «On error» and «On success» fields.

That's it! You have set up Wazzup in Salesbot. Save the settings in the upper right corner.

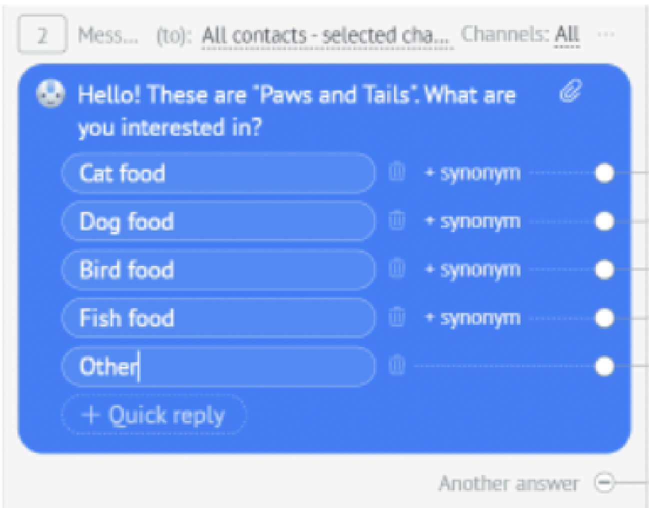
How to send a WABA message with Salesbot buttons

You can send messages containing 1-10 Salesbot buttons from WhatsApp Business API (WABA) channels. Such a message will be sent only when you open a 24/7 chat WABA.

A message with Salesbot buttons is not suitable for creating a 24/7 chat. To start a conversation using a message with buttons, you need a Meta-approved template – up to three buttons can be added to this template. This template must be created and submitted for moderation in your Wazzup account.

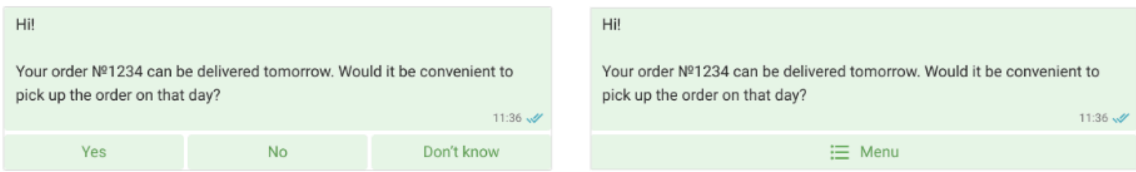
How to send a message with Salesbot buttons

When configuring the Salesbot, insert the «Send message» step at the desired point in your workflow. Enter the message text and include any buttons you want to appear for the recipient.



A message with more than three buttons will be displayed in the customer's chat and in your Wazzup chat with a «Menu» button. Clicking on it will open a list of buttons.

A message with more than ten buttons will not be sent in full. The customer will only receive the first ten response options.



What the message looks like with 1-3 Salesbot buttons

What the message looks like if there are more than 3 buttons

If there is one chat with the customer, the message will only be sent there. If there are multiple chats with the same customer, Salesbot will send the message to all of them.

How to send a message on Instagram with Salesbot

Salesbot is a bot that can be programmed to perform specific actions. If you have a customer's contact number but haven't previously contacted them, you can use Salesbot to initiate a conversation. The message will be sent to the customer from the channel of the sales representative responsible for the deal.

Please note that Salesbot can only send messages to users with whom a deal has already been created. Since «Initial contact» is not a deal stage, it is not possible to send messages to customers from «Initial contact».

How to create Salesbot and respond to incoming messages

1. Go to the «Deals» section → open the desired funnel → click «Configure» in the upper right corner

2. Click on the empty cell at the stage at which the bot should be triggered → select Salesbot.

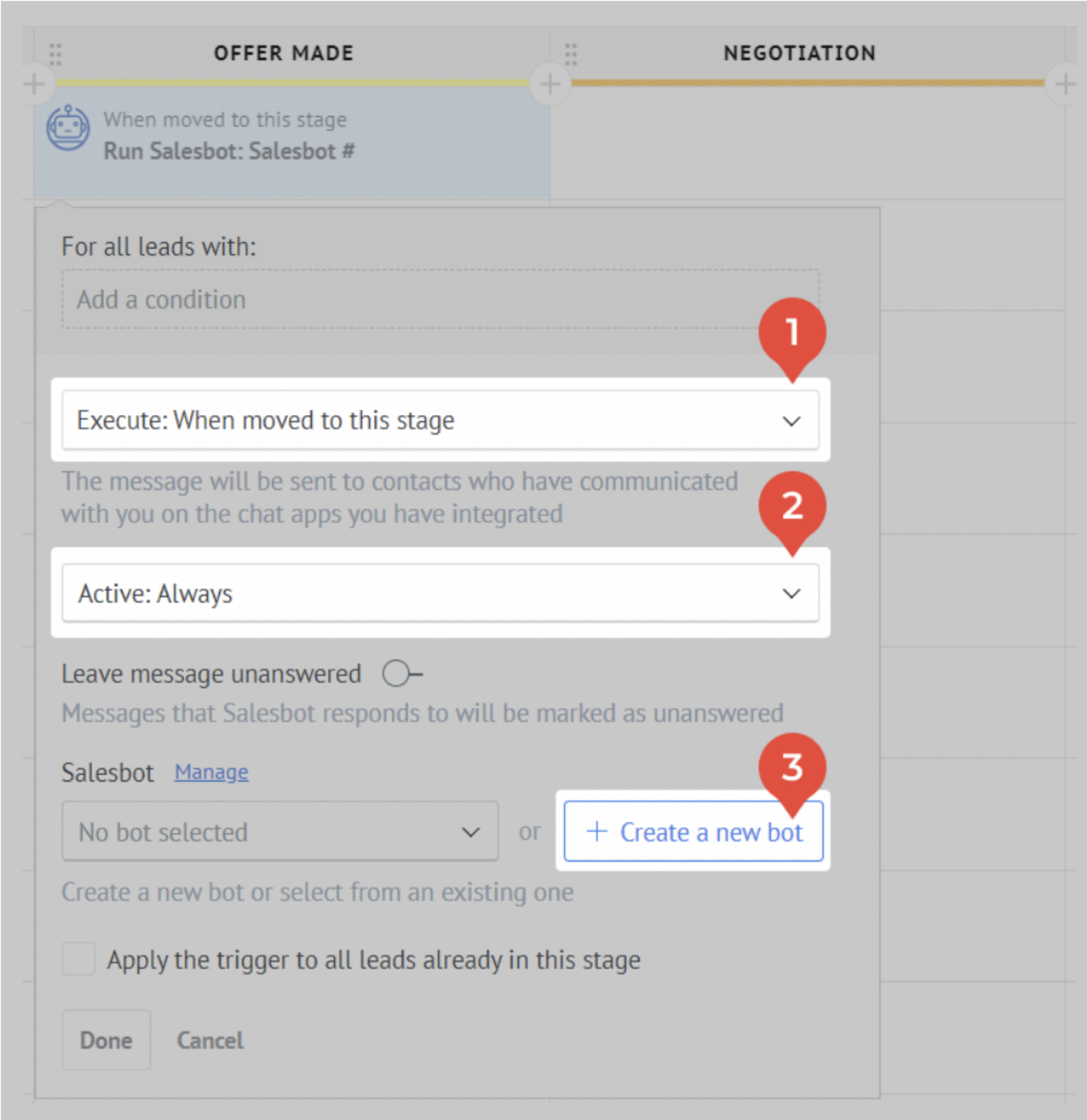
3. The bot settings will open. Select:

- the event (trigger) that will activate the bot
- the triggering time.

You can also specify a condition to determine when the bot will send a message to the contact from the deal.

In our example, the bot will be triggered when the deal is transferred to the «Negotiations» stage.

It will always be triggered if a deal moves to that stage. This applies to all deals.
Then click «+ Create a new bot».



4. The bot editor will open. In the «Your Bots» panel, select «Create your own bot».

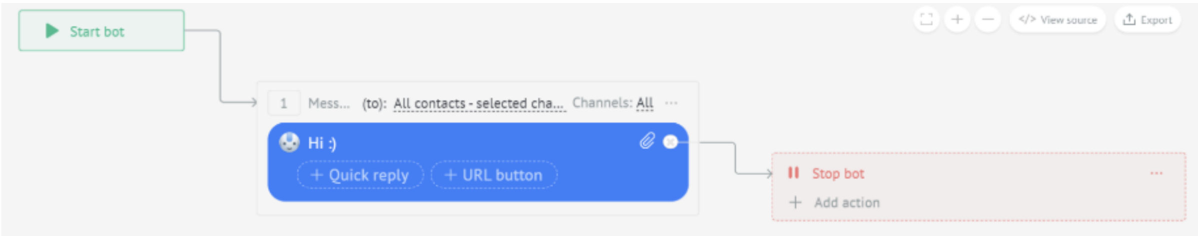
5. In the «Next Step» list, select «Send Message».

The bot will send messages to all existing chats with the customer. If the customer has chats in other messengers besides Instagram, the message will be sent to those chats as well.

6. Type a message for the customer.

7. In the next step, select «Stop bot».

The bot will look like this:



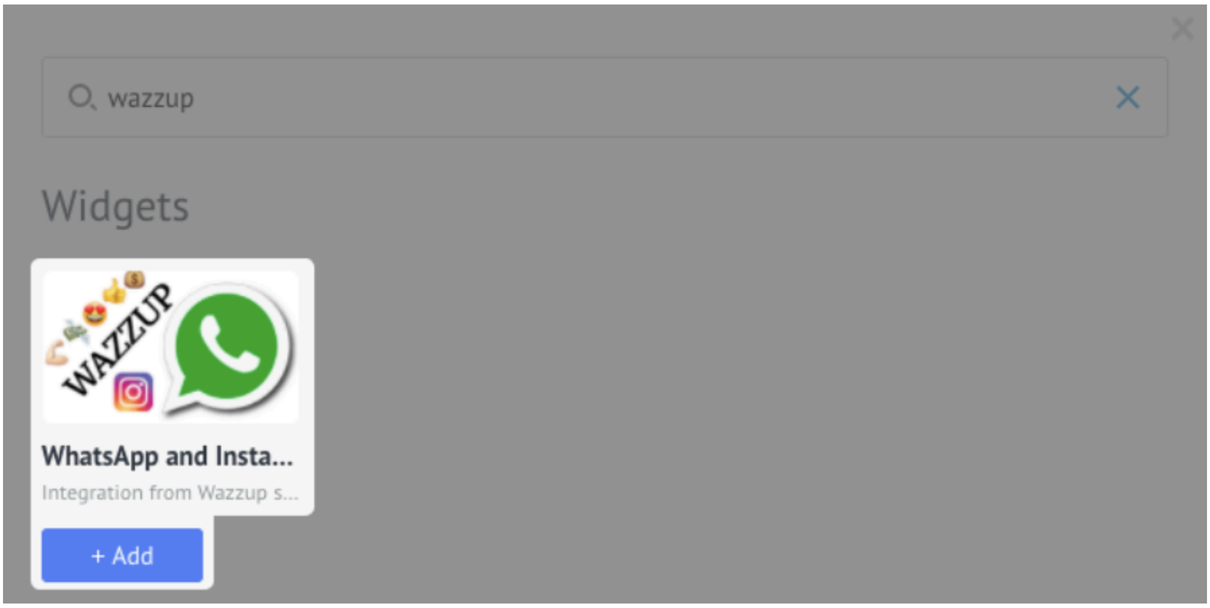
Create a chat with a customer using a trigger

In Kommo, you can automatically create a chat with a customer when a deal moves to a certain stage. To do this, add a trigger in the funnel settings — this is what an automatic action is called in amo.

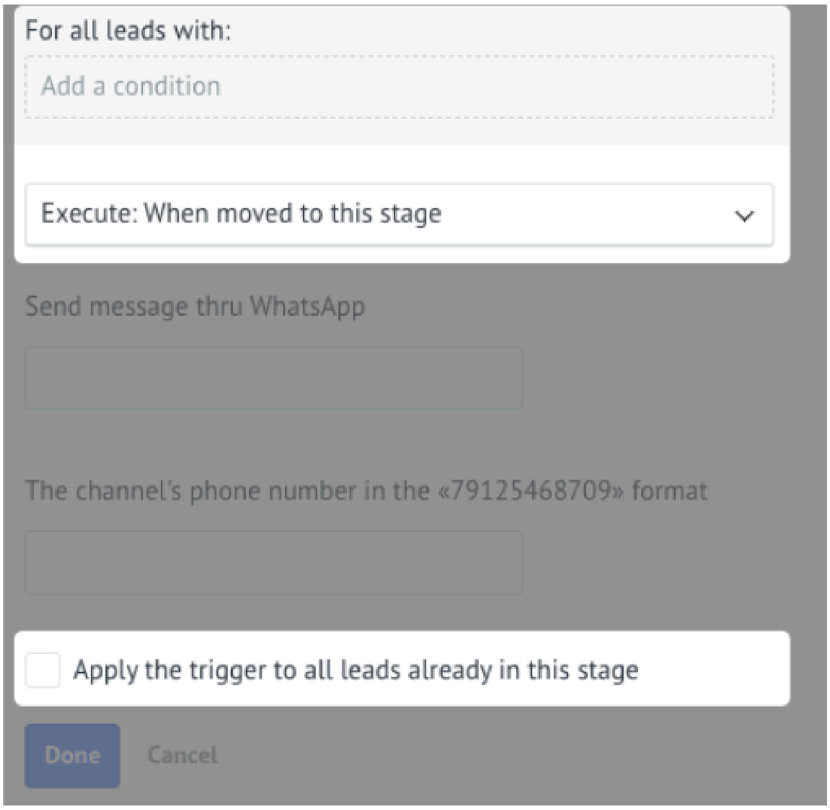
1. Go to the «Deals» section on the left panel of Kommo → open the desired funnel → select «Configure» in the upper right corner.

2. Click on the empty cell at the stage where you want to send the message to the customer → «+ Add trigger».

3. A window will open. Enter «Wazzup» in the search field and click «Add».



4. Select the condition for sending the message. If you want the trigger to apply to customers who are already in this funnel, check the box labeled «Apply the trigger to all leads already in this stage».



5. Enter a message in the «Send message to WhatsApp» field. If you leave the message field blank, the chat will be created but the message will not be sent to the customer.

6. Enter the channel phone number in the «Channel phone number in the format 7800553535» field and click «Done». If the channel number is incorrect or this channel is removed from the service, the message will not be sent. An error notification will be sent to the deal.

If you leave this field blank, the message will be sent from the channel of the sales representative assigned to the customer.

If the customer does not have a WhatsApp account with that number, the chat will not be created. An error notification will be sent to the deal chat, and a «no WA» tag will be added to the deal.

2. Bitrix24

How to send a message from Business Processes
Correspondence with customers can be automated using Business Processes.

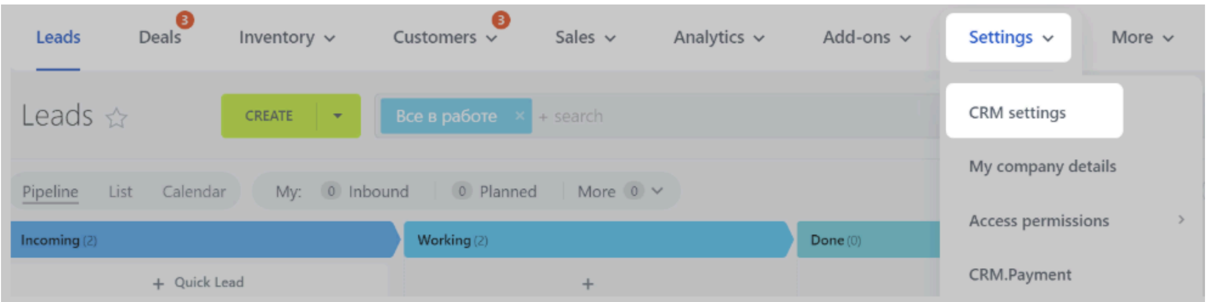
This allows you to send messages via the WABA channel, trigger messages when a deal or lead moves between stages, and perform many other automated actions.

In this section, we will explain how to automatically send messages to customers from WhatsApp, WABA, and Telegram.

How to send a message

For example, let's add a Business Process that will automatically send messages when a deal is created:

1. Go to the «CRM» section on the left panel of Bitrix24 → the «Settings» tab on the top panel → the «CRM Settings» item.

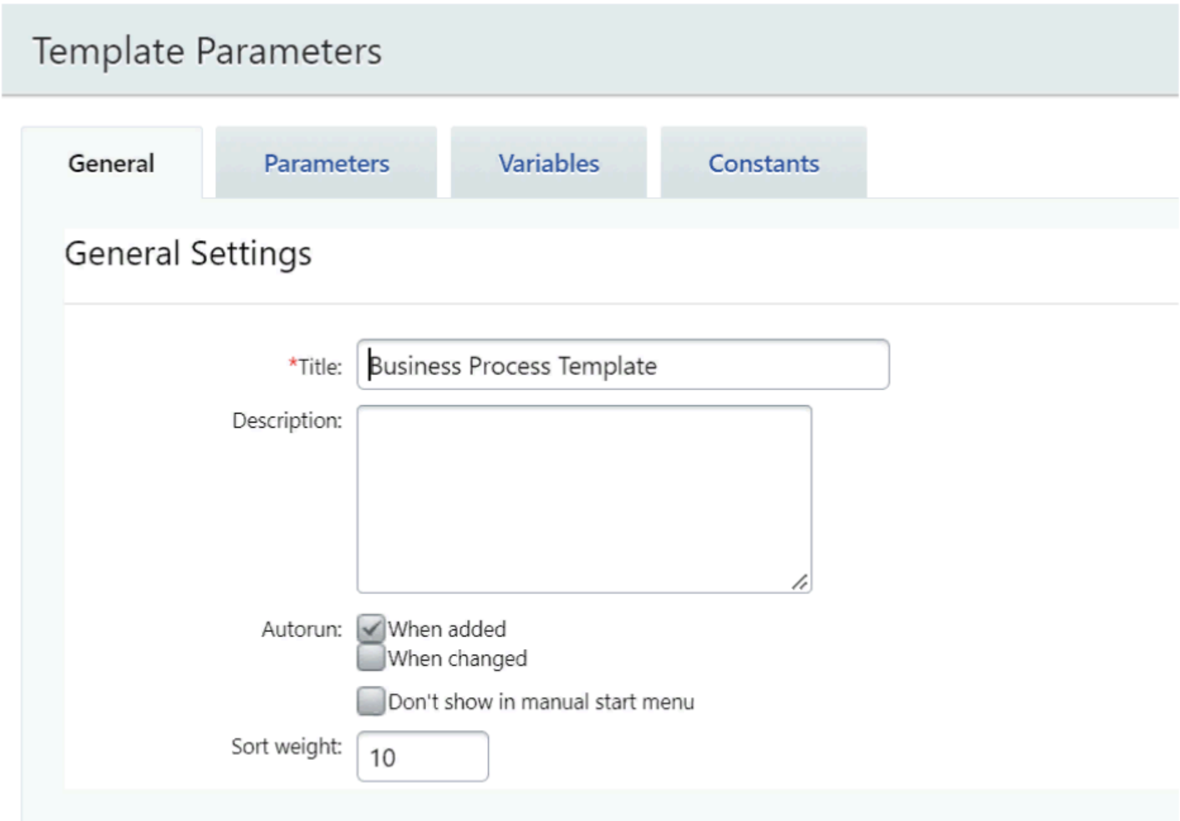


2. Click «Automation» → «Business Processes» on the left.

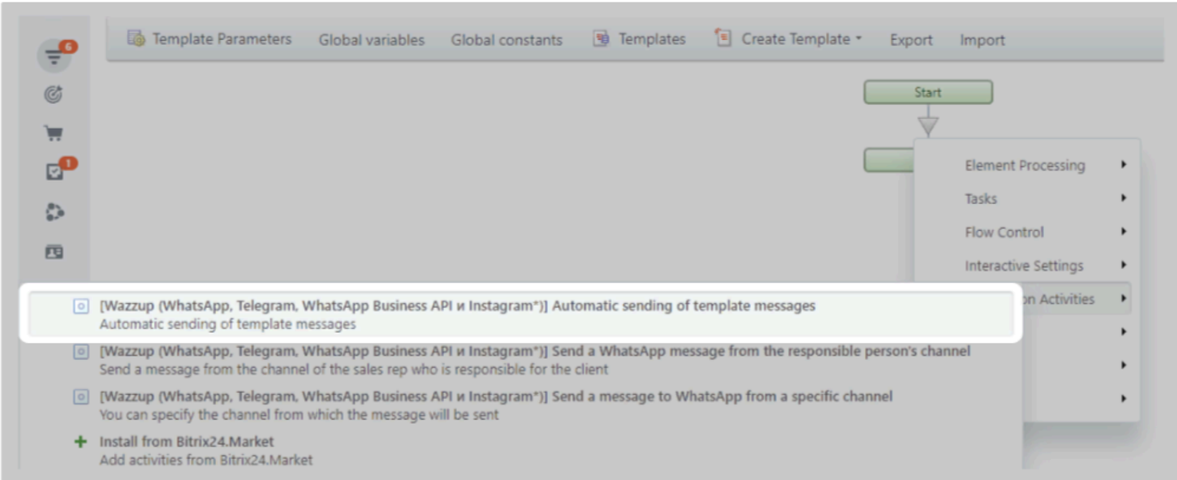
3. Select the entity with which the business process will work: lead, contact, deal, company, etc.

In our example, this is «Deal» → «➕ Add Template».

4. Enter the name of the template → leave a check mark in the item «When added» → «Save».



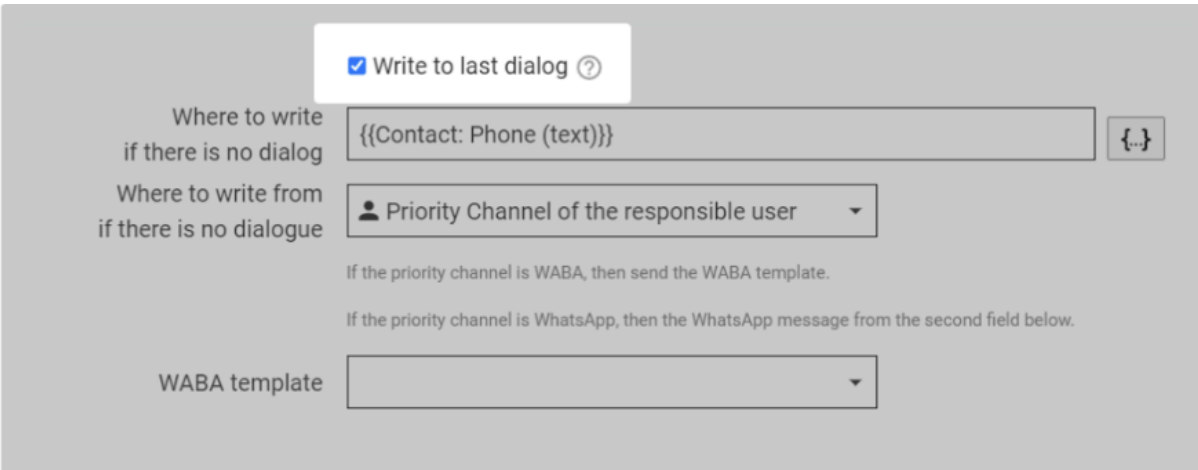
5. Click on the triangle between «Start» and «End» → «Application Activities» → the gear next to «Automatic sending of template messages»



If there is no «Automatic sending of template messages» button, go to Wazzup's personal account and click «Update data from CRM» in the integration settings.

6. An activity window will open.

7. Choose how you want to send messages to customers:



Send a message to the last conversation. If you select «Send a message to the last dialogue», the message will be sent to the chat that had the last incoming or outgoing message, including automatic ones. The message will be sent to the same number or username of the customer, using the same channel.

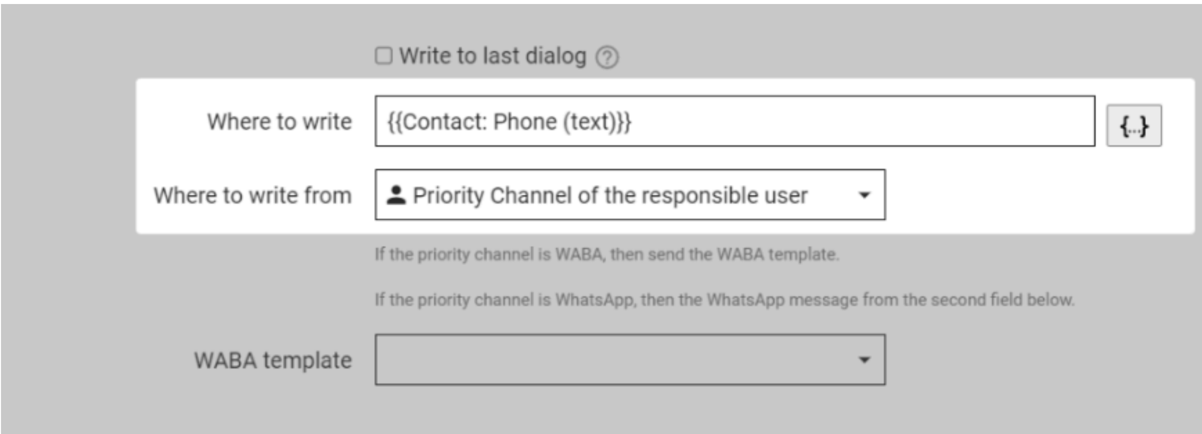
If there is no last chat, the message will be sent:

- from the channel selected in the «Where to send a message from if there are no dialogues» section
- to the number or username from the Bitrix24 field that you selected in «Where to send a message if there are no dialogues».

Send a message from a specific channel to a number or username from a specific Bitrix24 field:

- in the «Where to send a message» field, select the channel from which you want to send messages;
- in the «Where to send a message» field, select the Bitrix24 field that contains contact information .

You can add several CRM fields to the «Where to send a message» field - then the message will be sent to all specified numbers and usernames from these fields. If a single field contains multiple numbers or usernames, the message will be sent only to the first one listed.



If you select «Priority channel of the responsible»:

a. In the activity settings, clear the «Run as» field,
b. Click on the three dots to the right of the field → open the «Element Fields» list → select the «Responsible» variable

8. Create a message that will go to the customers.

From a WhatsApp, Telegram or Viber channel, you can send a text message with an attached image, video, document.

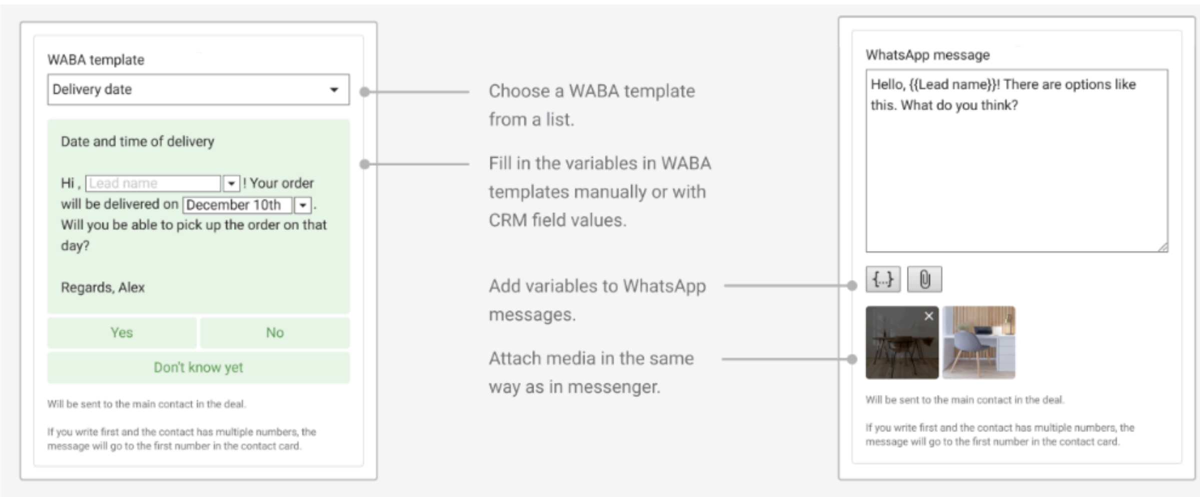
You can add a variable from CRM to the message. For example, customer name or order number. To do this, click on the {...} button below the message field.

To find an exact variable without manual scrolling through the entire list, you can use the search. To do this, start typing in the upper empty line the name of the variable or CRM element, for example, "Name".

You can send a template only from the WABA channel. The list will display all templates available in your personal account.

Fill in the variables manually or insert data directly from your CRM system. To automatically pull data from Bitrix into the message, click on the arrow next to the desired variable → select the field from which you want to retrieve information.

Attach a file if you have a template with media files.



You may have both a message input field for WhatsApp and Telegram channels and a list of WABA templates displayed. This happens if you have different channel types and you want to send a message from the priority channel or to the last chat.

Fill in both fields. If the message is sent from the WhatsApp or Telegram channel, the business process will get that it should send the text from the “Message for WhatsApp and Telegram channels” field. If sent from the WABA channel, the bot will deliver the selected template.

Messages will only be sent from one channel at a time, not both simultaneously.

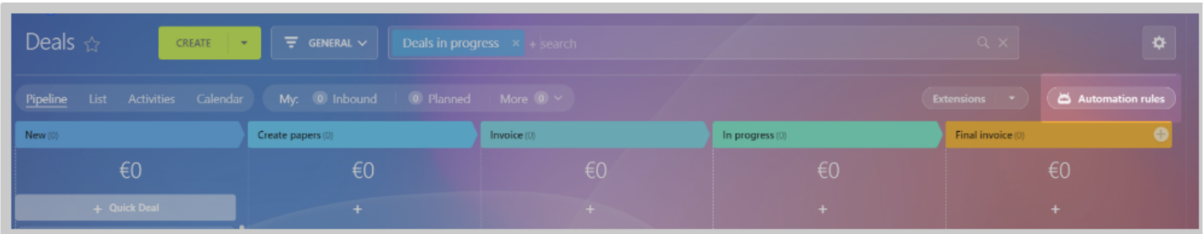
After entering the messages, click «Save» → the business process editor will open. In the editor, click «Save» again to confirm your setup.

The business process is ready – when a new deal is created, a message will be sent to the customer.

How to add an Automation rule

Correspondence with the customer can be automated using robots. When creating a new lead, deal, or when the deal moves to a certain stage, the robot will create a chat with the customer and send them a message:

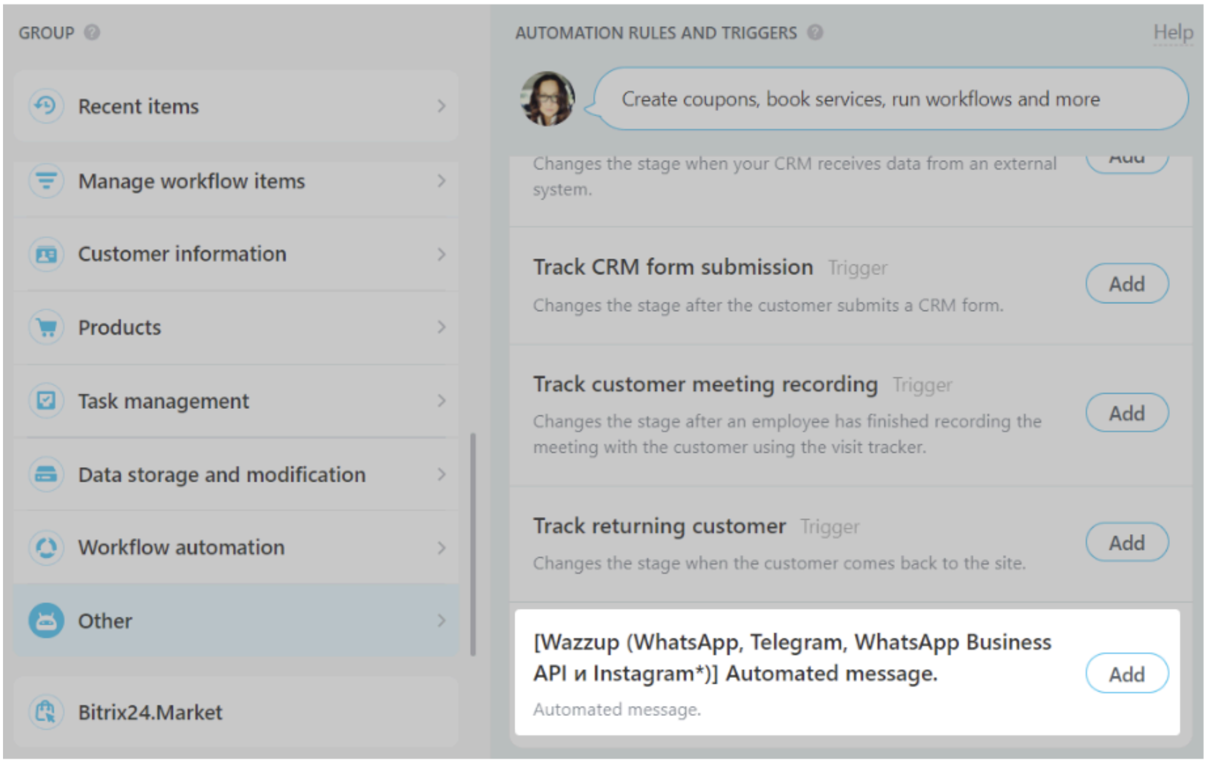
1. Go to the CRM section on the left panel of Bitrix24. On the right above the funnel stages, click on the robot icon.



2. Go to the «Robots» tab.

3. In the «Robots» section, click «+» at the desired process step. Or click on the green «Create» button and select a process stage.

4. Select the robot: «Other» → «Wazzup (WhatsApp, Telegram, WhatsApp Business API and Instagram) Automated messages» → «Add». After the first use, the robot will appear in «Recents» and you can add it from there.



Even though it's called «Send SMS», the message will be sent to WhatsApp or Telegram, depending on your choice. Here's how it's implemented in Bitrix.

5. Enter the message text.

How to send an attachment

You can add an attachment to it, but only by link. For this:

a) Prepare a link to the file. Send the file via Wazzup chat to your number or customer number. The service will process the file and assign a link to it.

b) Right click on the image → copy the URL of the image.

c) Add a link to the message. Enclose all links in square brackets [ ]. It will look like like this:

[https://store.wazzup24.com/c4d2f98d9b3d75d1a8e8d760343c26cc66495ea4]

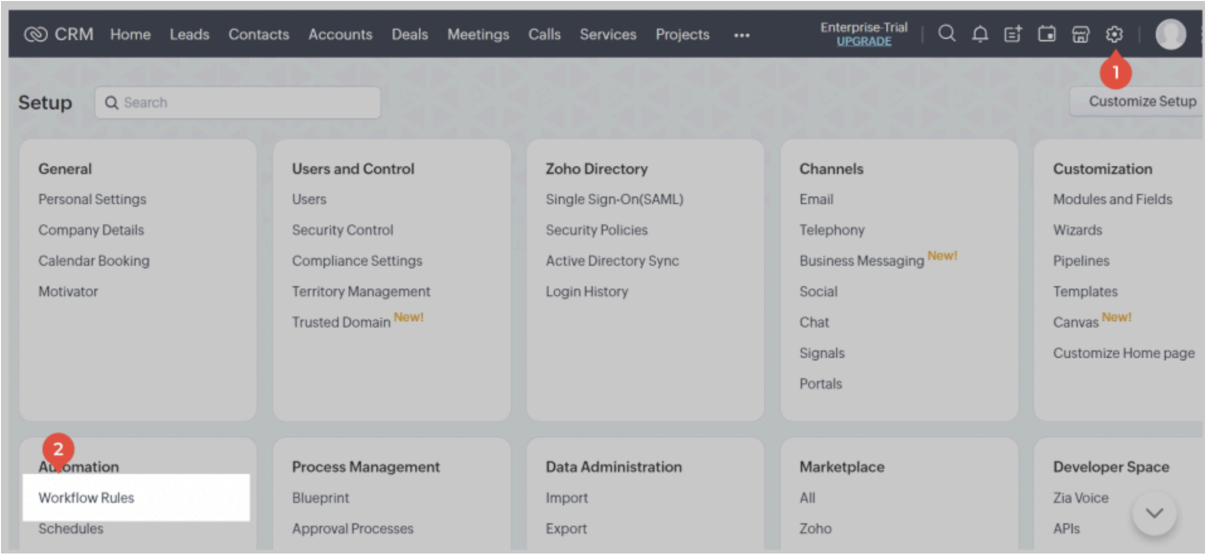
Select from the drop-down menu the type of customer number to which the message will be sent. You can change it in the contact card. If you select «Auto Select», the message will be sent to the first number specified in the contact card.

Select from the drop-down menu «Provider» → «Wazzup: WhatsApp message», «Wazzup: Viber message» or «Wazzup: Telegram message».

Done – you've added a bot that sends a message to WhatsApp or Telegram when a new deal or lead is created.

3. Zoho CRM

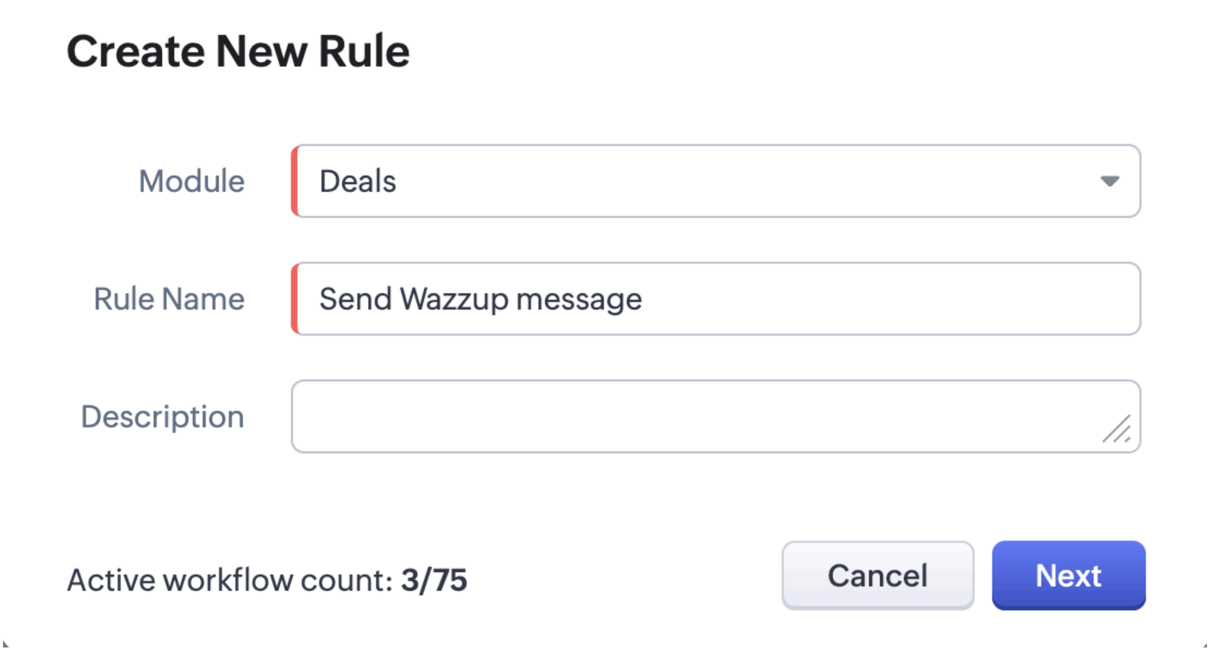
How to send automated messages from Zoho CRM to WhatsApp
To send automated messages from Zoho to WhatsApp and WABA channels, use the «Workflow Rules» section.
1. Click the gear icon in the top menu bar of Zoho to open the settings → find the «Automation» section → Workflow Rules.



2. Click the blue button «+Create Rule» → a window for editing the rule will open.

3. In the «Module» field, select what the rule will work with: deals or leads. Enter a name for the rule.

Click «Next».

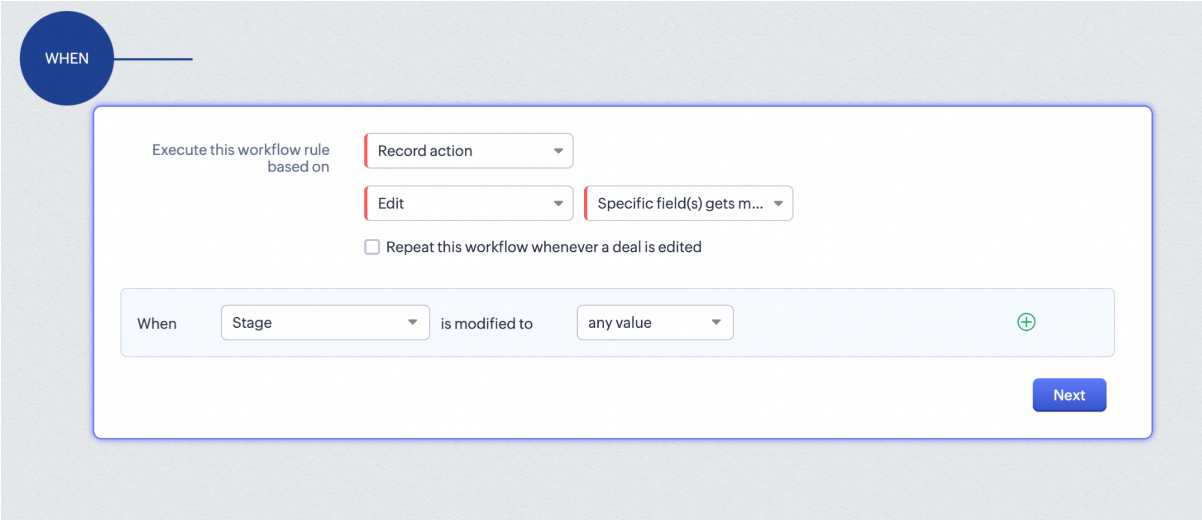


4. A window will open where you need to configure the rule.

At the «When» stage, select when the trigger should be activated:

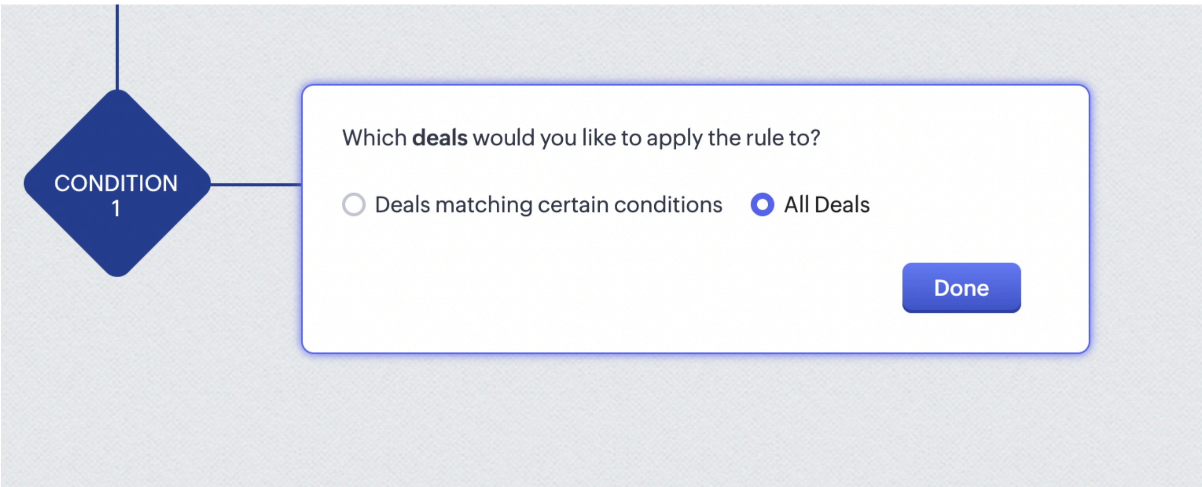
- after a certain action,
- according to a schedule,
- after assigning a rating.

For each option, there are additional conditions — they also need to be configured.

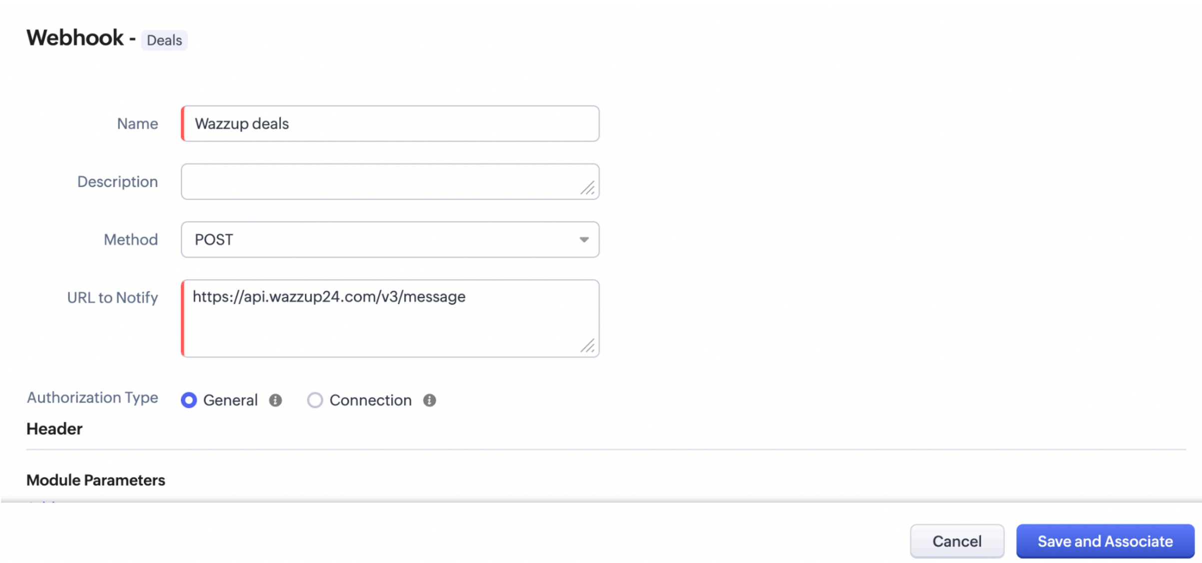


5. At the «Condition 1» stage, select which deals the rule should apply to:

- for those matching certain conditions,
- for all.



5. Add a webhook that sends a message from Wazzup when triggered:
Click the «Instant Actions» button → «Webhook».
Within the webhook settings, select the “POST” method. Fill in the URL field:
https://api.wazzup24.com/v3/message
In the «Authorization type» field, select «General».



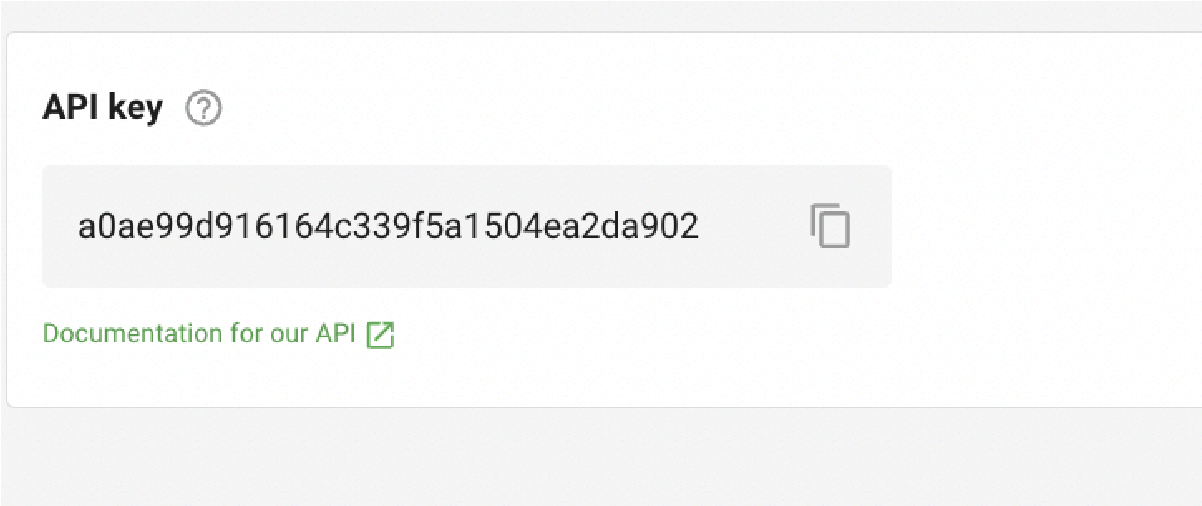
6. In the «Header» section under «Custom Parameters», click «Add Parameter» — a new parameter will appear. Fill it out as follows:

- Parameter name: Authorization
- Parameter Value: Bearer + API key

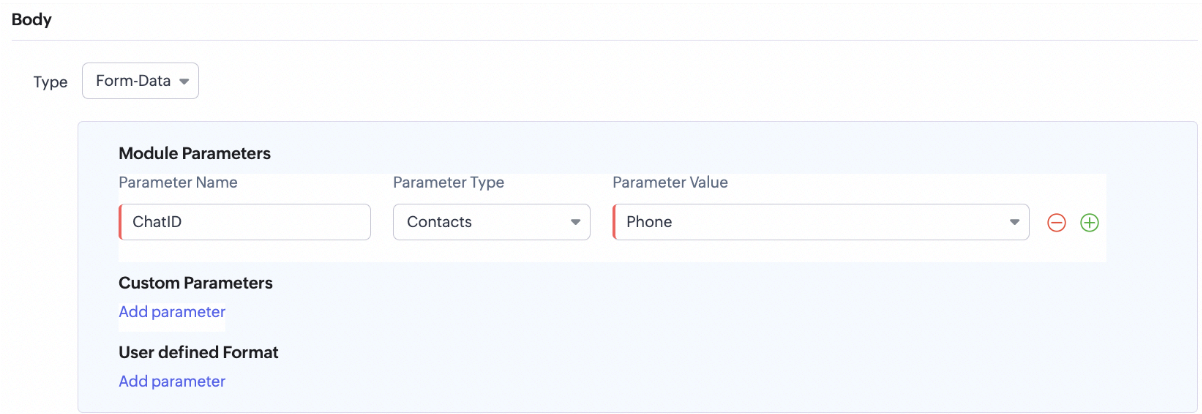
Where to find the API key?

In your Wazzup account, go to «Integration settings» → click «Additional».

Copy the API key at the bottom of the page.



7. In the «Body» section, set the «Typ»" field to «Form-data».
In «Module Parameters», click «Add parameter» → a new parameter will appear.
Fill it in as shown in the screenshot:



Fill in the first parameter as follows:

- Parameter name: channelId
- Parameter value: ID of the Wazzup channel from which the message will be sent.

Where to find the channel ID?
Go to your Wazzup account and then to the «Channels» section. Find the channel you need and click on the icon on the right to open card details.

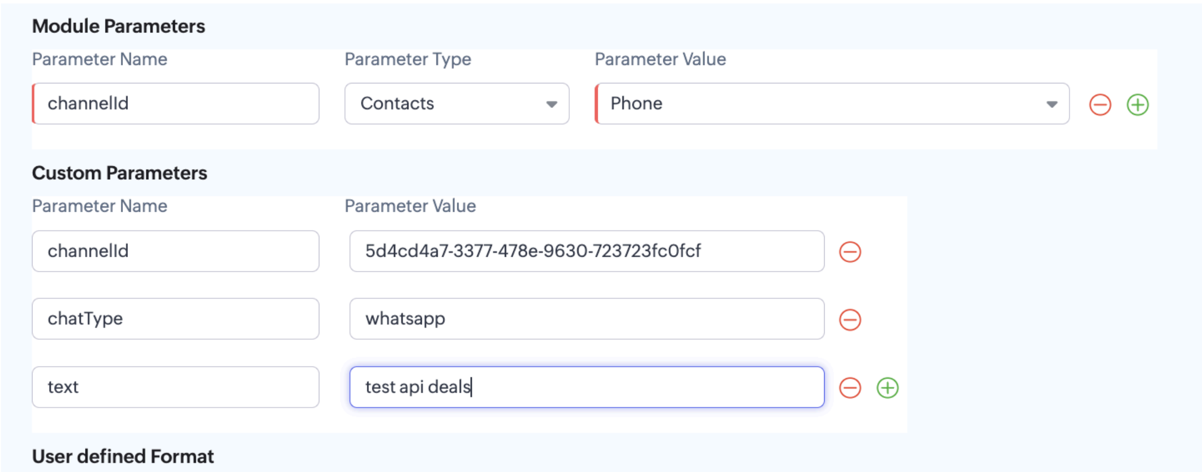
Now you need to copy the channel ID from the link in the browser.

Second parameter:

- Parameter name: chatType,
- Parameter value: whatsapp.

Third parameter:

- Parameter name: text
- Parameter value: text that will be automatically sent to clients.



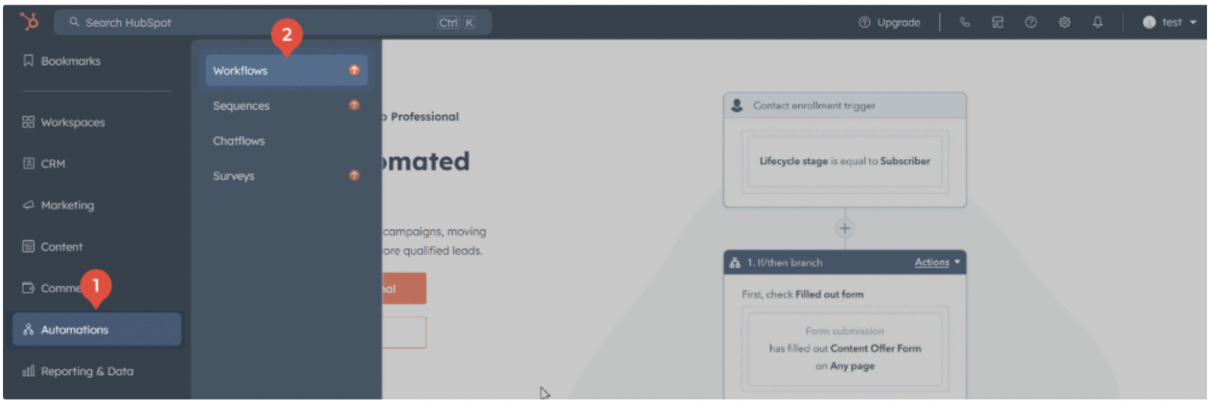
Done! When a deal stage changes, Wazzup will automatically send a message to the number of the contact specified in the deal card.

4. HubSpot

How to automatically send messages from HubSpot to WhatsApp

To automatically send messages from WABA and WhatsApp channels, create a process in the «Workflows» section.

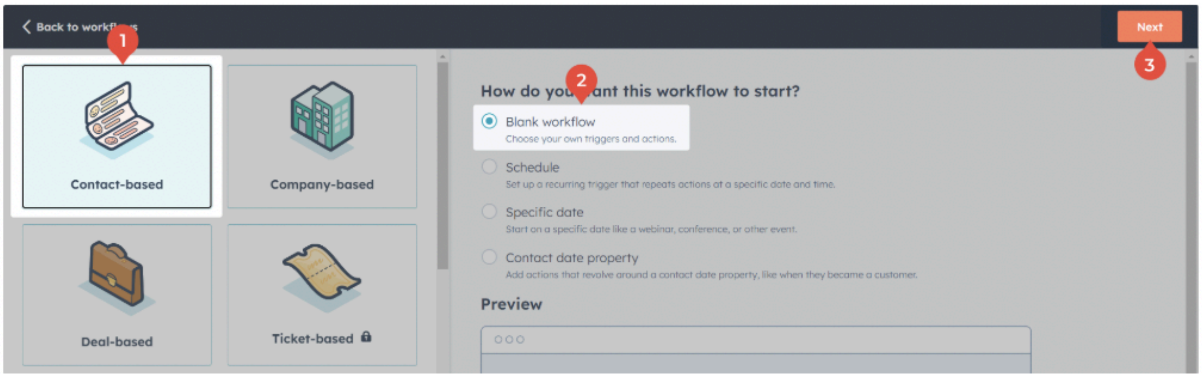
1. Click «Automations» on the top bar of HubSpot → «Workflows».



2. Click in the upper right corner «Create workflow» → «From scratch».

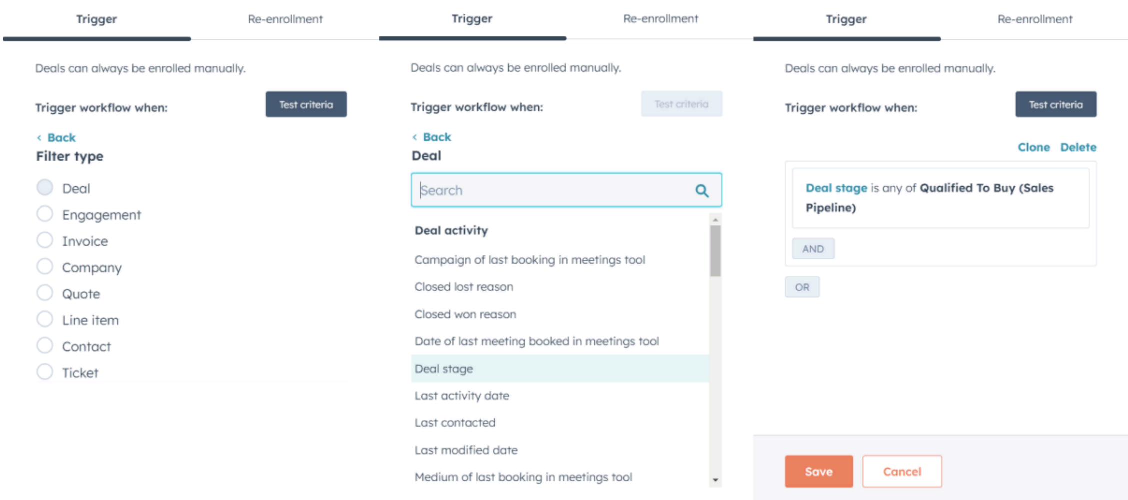
3. Select the desired item in the window that opens. In our example, the robot will process deals, so we select «Deal-based».

Select «Blank workflow» → click «Next».



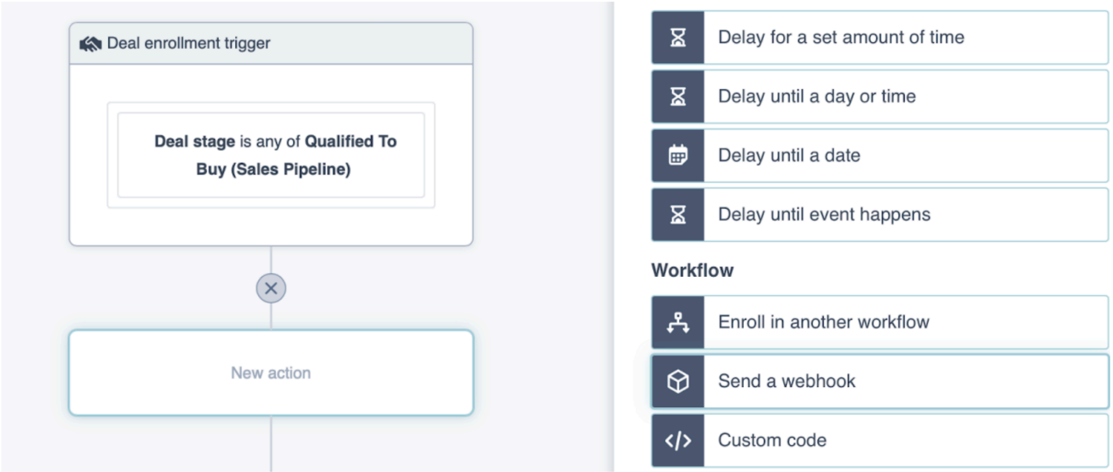
4. Click «Set up triggers». From the list, select:

- The entity the trigger will work with — in our case, a deal;
- The action that will activate the trigger — in our example, the transition of the deal to another stage.

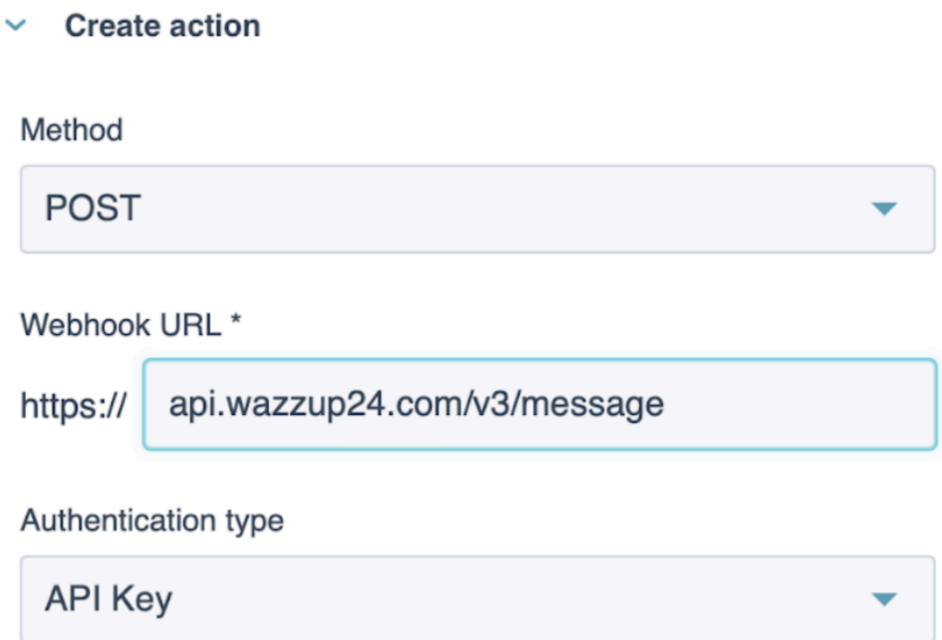


Specify the conditions under which the action will be performed. In our example, when the deal is transferred to the «Qualified to buy» stage. Click «Apply filter» → «Save».

5. Click «+» → «Send a webhook».



6. Select the «POST» method.
Fill in the Webhook URL field with this link:
https://api.wazzup24.com/v3/message
In the Authentication type, select «API Key».



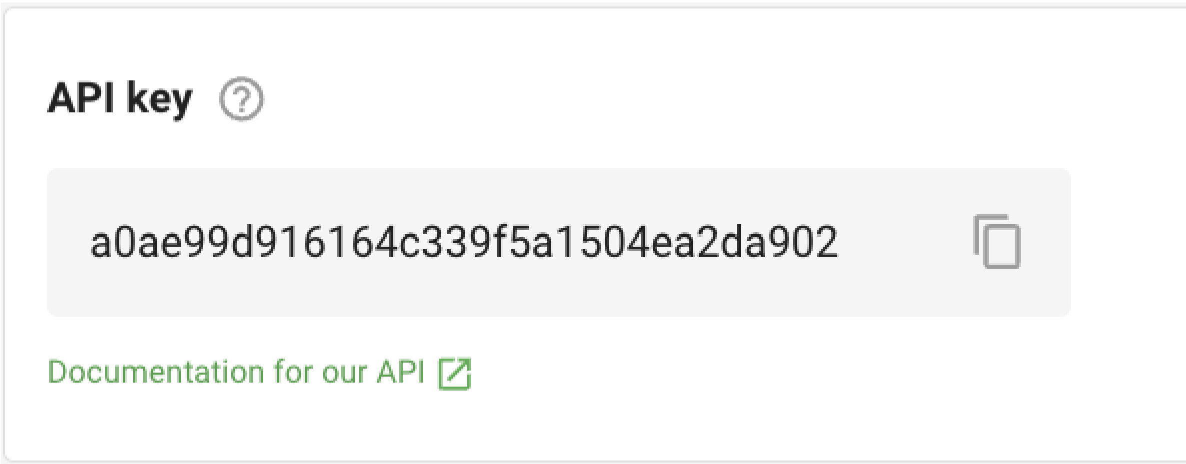
7. In the API Key field, click «Add secret». A window will open that needs to be filled in as follows:

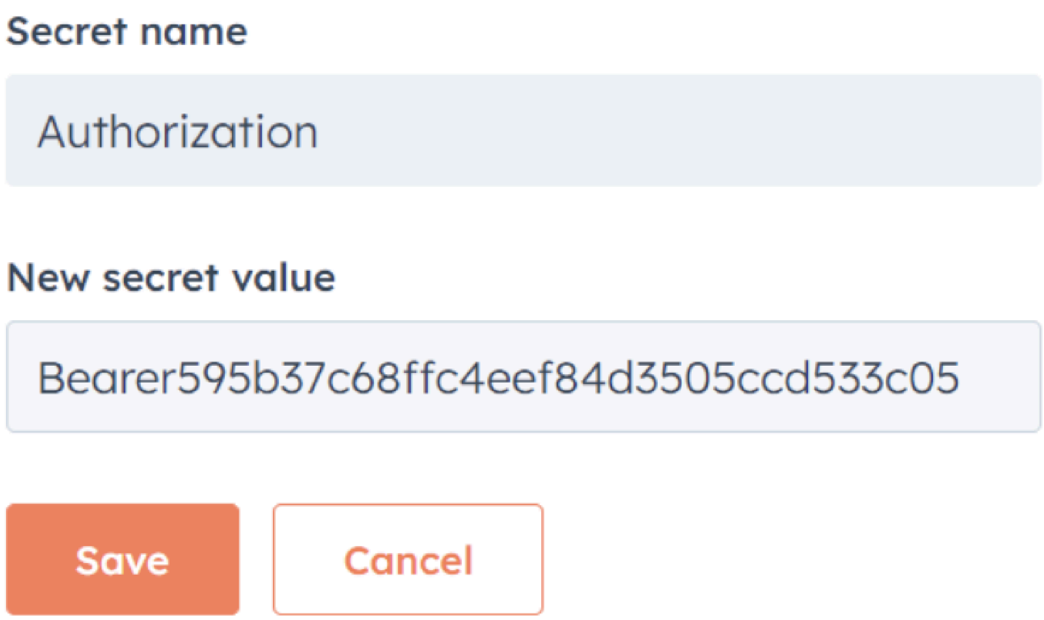
- Secret name: Authorization
- Secret value: Bearer + API Key

Where to get the API key?

In your Wazzup account. Go to «Integration settings» → tab «Additional».

Copy the key at the bottom of the page.





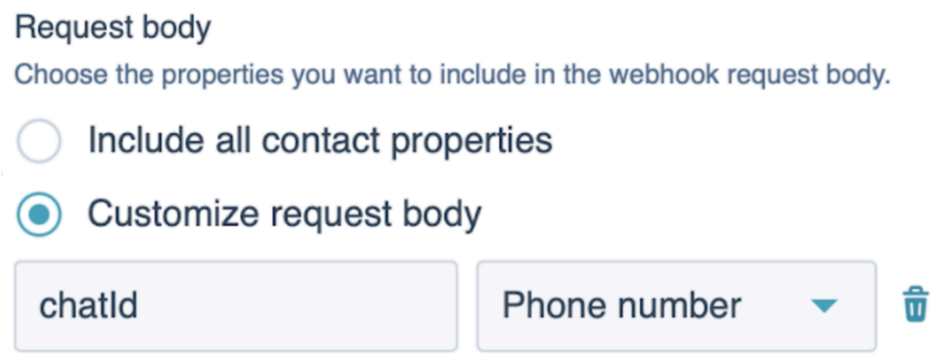
Click «Save» — the API Key name field will be filled in automatically.

8. In the «API Key location» field, leave the «Request header» value.

9. In the «Request body» field, select the «Customize request body» value.

Here, you need to specify the field in the transaction from which the phone number will be extracted. This is the number to which the automatic message will be sent. Click «Add property» and fill in the fields:

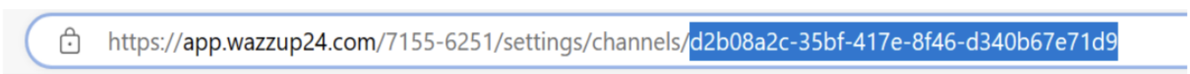
- Key (left column): chatId
- Value (right column): Phone number



10. Add three fields using the «Add static value» button. Fill in the first field like this:

- Key: channelId
- Value: ID of the channel in the Wazzup personal account from which the message will be sent.

Where to find the channel ID?
Go to your Wazzup account, to the «Channels» section. Find the channel you need and click on the icon on the right to go to the card.
Now you need to copy the channel ID from the link in the browser.



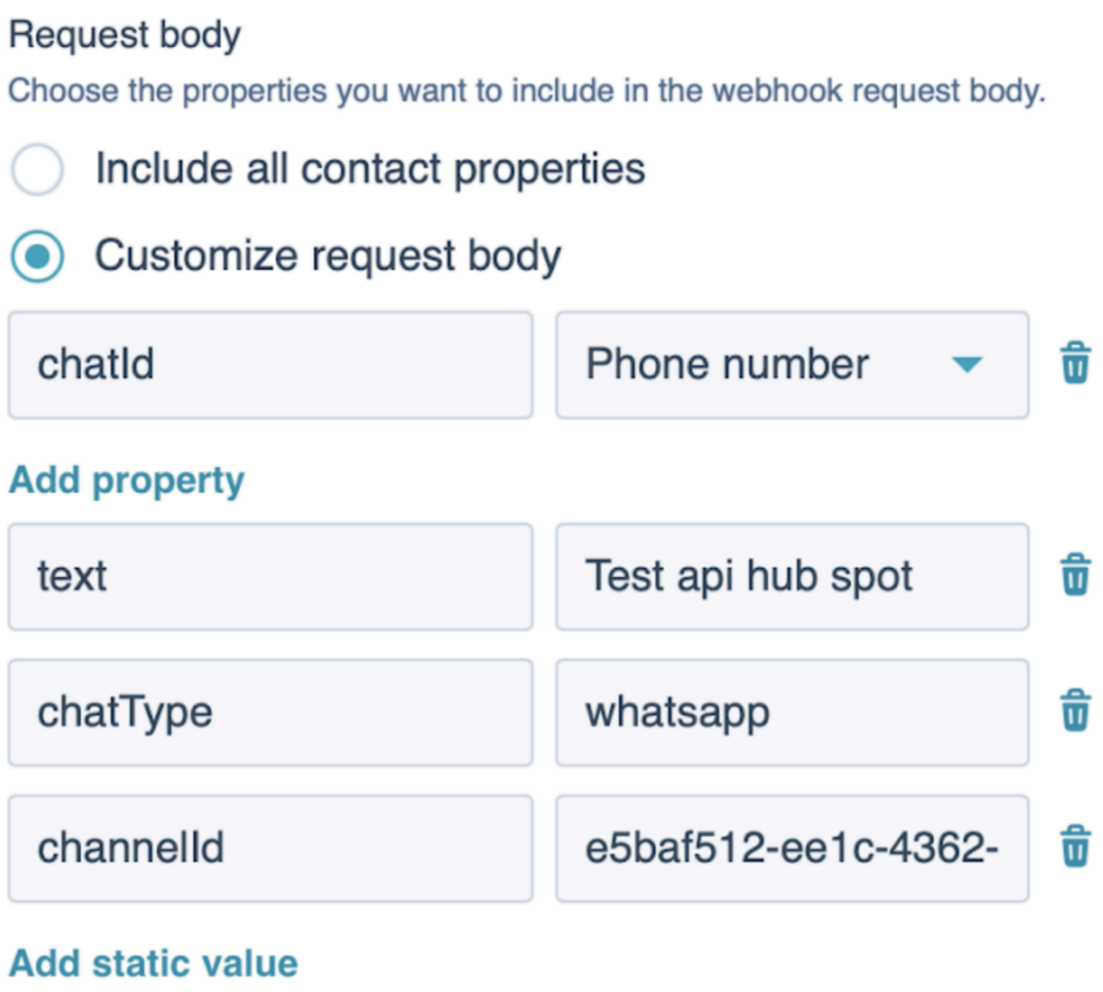
Second field:

- Key: chatType
- Value: whatsapp

Third field:

- Key: text
- Value: here enter the text of the message that will be sent automatically.

This is what you should get:



11. Save the Webhook, then save the rule you have created.

Done! When a deal stage changes, a message will automatically be sent via Wazzup to the number of the contact specified in the deal.

Software operation manual

SIA "WAZZUP"

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Wazzup Software

(version 1.0)

Description of the life cycle, support and maintenance of the software

Pages 5

ANNOTATION

This document contains a description of the software functional characteristics.

This document is intended for administrators of the software «Wazzup».

SOFTWARE DESCRIPTION

- Software type: Web application (SaaS)
- Name: Wazzup
- Programming language: JavaScript (development environment: Vue.js, Node.js)
- Target audience: marketers, entrepreneurs
- Project start date: August 01, 2017
- Project completion date: December 31, 2022

FUNCTIONAL CHARACTERISTICS OF THE SOFTWARE

The software is a service that seamlessly integrates with existing CRM systems and instant messaging platforms. It enables companies to communicate effortlessly with their customers through instant messengers while providing managers with comprehensive tools to oversee and manage their team's activities.

The service functions as a "connector" between popular instant messaging platforms and CRM systems. The implemented technology enables the distribution of customer message flows—sent to a single corporate number—among sales representatives within the CRM. This allows on-site salespeople to communicate directly with customers through the CRM, with messages seamlessly delivered to customers via their preferred messaging apps.

The software provided for verification offers the following functionality, which allows:

- register an account in the service and connect it to your CRM system;
- add one or more "channels" (a channel is a messenger account through which the company communicates with its customers);
- set up different access levels for CRM system users to the "channels", allowing sales representatives to communicate with customers through specific channels and receive incoming messages exclusively from certain channels;
- analyze the work of the sales representative, based on the statistics of their responses (section "Analytics");
- set up template responses to speed up the salespeople's work;
- configure automatic responses to customers outside of working hours or for the initial inquiry.

To install and use the application, you need to register in your personal account (registration is done via email), then go to your personal account, add the necessary "channels" (a channel is a messenger account through which the company communicates with its customers), connect the application to your CRM and set up access for CRM users. Our system records all account creation details, including associated channels and configuration settings, in the database. From this point on, the application can be used.

SUPPORT FOR USERS WITH DISABILITIES

Support for users with disabilities is currently not implemented.

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