



**whatex**

**Team Inbox for WhatsApp**

### About Whatex

Whatex is a business WhatsApp solutions provider, enabling brands and teams to connect with consumers over WhatsApp.

Consumers have moved on from email and the modern lifestyle means people are harder to connect to.

Utilising the power of WhatsApp API, Whatex opens up WhatsApp as an official communications channel for your sales and service teams.



### Why WhatsApp?



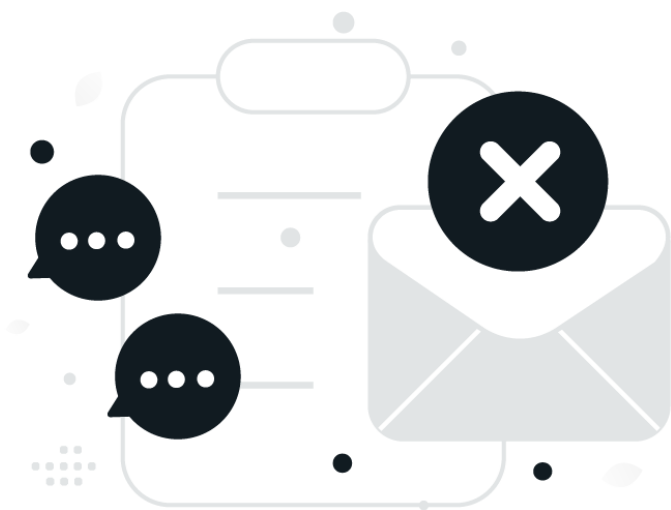
Messaging is the preferred method of communication in our personal lives.



WhatsApp is the most popular messaging app in over 100 countries and boasts over 2 billion active users.



The average WhatsApp user opens WhatsApp 23 times per day.



Personal email accounts are drowned in spam and junk.



75% of callers hang up at voicemail.



Open and read rates are 7 times better in WhatsApp than in email.

Sales Team

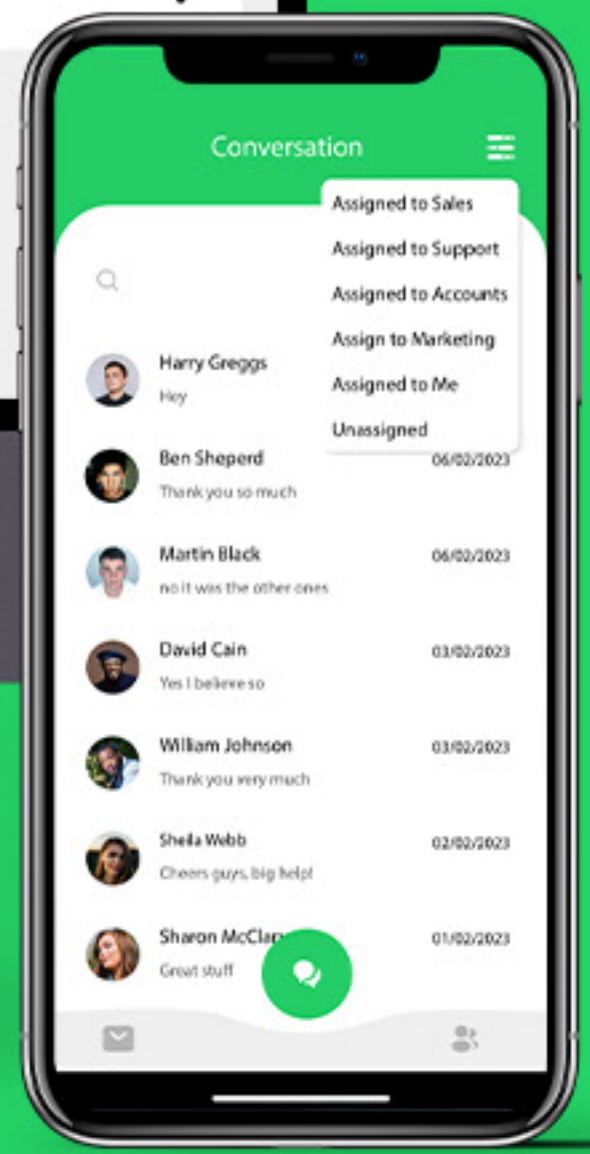
Search contact name... Bulk Contact Import Add contacts

Account Select...

Phone Number	Tags	Created On	Account	Actions
147123 456 789	#staff	Wed 11 Jan 2023	Call43	⋮
147234 567 890	#sales	Mon 20 Jan 2023	Call43	⋮
147345 678 901	#sales	Mon 03 Apr 2023	Call43	⋮
147456 789 012	#mark	Fri 09 Jun 2023	Call43	⋮
147567 890 123	#staff	Thu 18 May 2023	Butcher & Landon	⋮
147678 901 234	#acc	Mon Jan 20 2023	Call43	⋮
147789 012 345	#staff	Mon Jan 20 2023	CRB	⋮
147890 123 456	#mark	Mon Jan 20 2023	Global Conenct	⋮
147901 234 567	#sales	Mon Oct 21 2023	Call43	⋮
147012 345 678	#sales	Tue Aug 22 2023	CRB	⋮

Previous 1 2 Next Rows per page 10

A Shared Team or Private Inbox with Browser Based Cloud Software and an App in Google & Apple Stores.



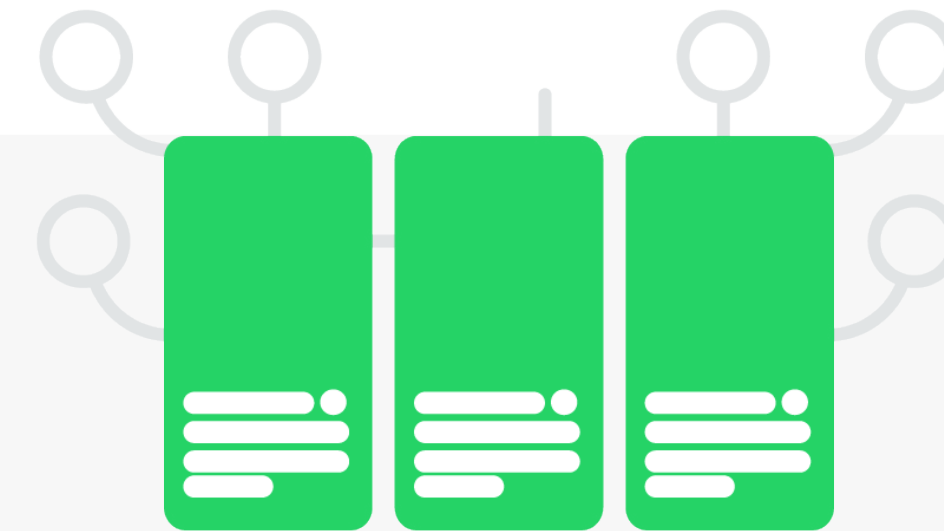
### The Tech Explained



Consumers using WhatsApp as normal



WhatsApp API via Gupshup enabling consumers & businesses to message on WhatsApp



Whatex software hosted on AWS in Europe



Business using the Whatex app and cloud software to message consumers

## How Whatex Can Help You

### Your current Issues with using WhatsApp without Whatex

- × Customer conversations are being conducted on personal WhatsApp accounts by your staff.
- × This increased during COVID & has now become the norm.
- × The business has no visibility of these conversations meaning they cannot be viewed, tracked or reported on as well as not being captured in the CRM.
- × Valuable data and information regarding key relationships sits with the staff, which is a business risk.
- × Client data cannot be deleted if requested.
- × Data is being processed outside of GDPR regulations, and in many cases, in breach of WhatsApp terms & conditions

### The Solution

Utilising a WhatsApp Business Solution (API) ensures your key ad confidential information is captured in a centralised location and stays within the business and fully GDPR compliant.

### How Whatex Can Help You

#### The communication Gap

- × Customers are often at work and are not easily accessible during the day.
- × Notifications for personal email accounts are often disabled, meaning open rates are poor (sub 20%). WhatsApp has a 9% open & read rate. 7 times greater than that of email.
- × B2C's report that over 70% of their outbound calls don't get answered.
- × Important updates can be missed & scheduling the next stage can become extremely frustrating.
- × Failing to communicate effectively can lead to reduce the customer experience and the value of the brand.

#### The Solution

Utilising a WhatsApp Business Solution (API) ensures access to your customer WhatsApp for ease of communication leading to a higher read & open rate, quicker response and improved CX.



### Collaboration

- Shared Team WhatsApp inboxes
- Permission based access to work related chats with ability to assign to individuals & teams and tag for broadcast marketing.
- Media rich to send & receive documents, images, barcodes, URL's & videos
- Analytics & Reporting



### Integration

- Drop conversations into your CRM so the business has wider visibility of communications
- Enable customers to start a chat from your website, social media or QR codes
- Integrate into your phone system to reduce call abandonment rates by auto sending WhatsApp messages



### Automation

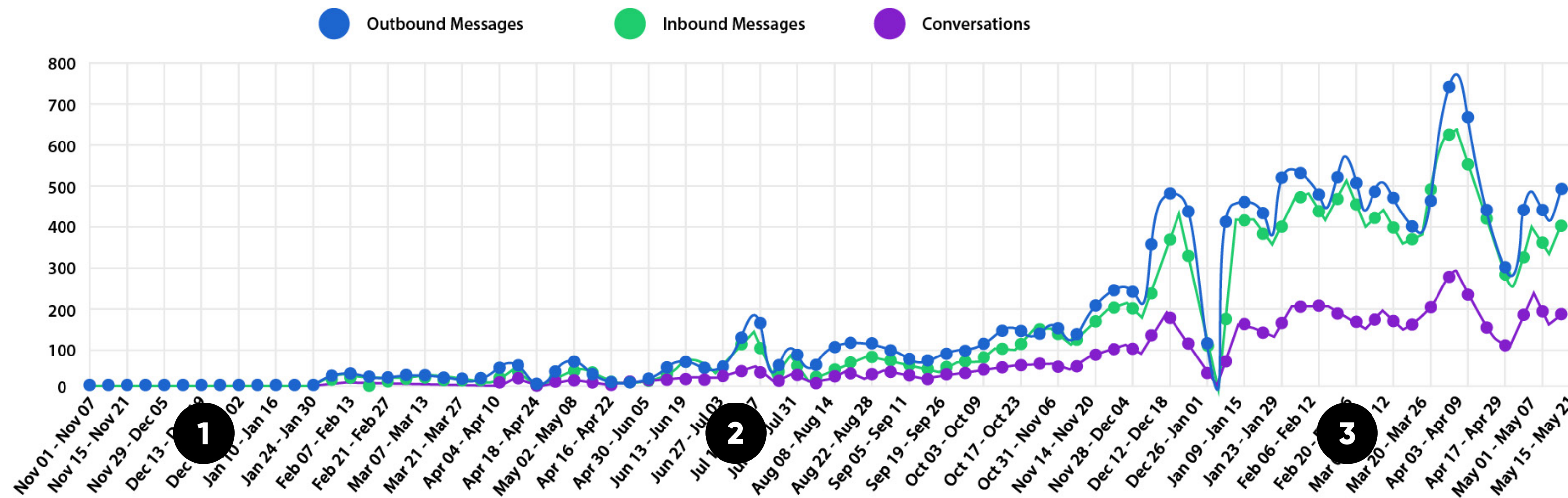
- Use bots to prequalify sales leads and enquiries
- Route automatically to the correct team for quicker customer response
- Manage out of hours requests easily
- Auto respond to 3rd party email leads & forms in WhatsApp



### Encryption & Compliance

- GDPR Compliant WhatsApp
- Adhere to WhatsApp's Personal & Business Policies
- MifidII Compliance
- End to End Encryption
- Phishing resilient





## How will customers know you're on WhatsApp?

### STAGE 1 – THE BASICS

Not every business generates high web traffic, so placing a widget on a website is no guarantee of generating leads, it's the equivalent of placing your phone number on your website.

### STAGE 2 –STAFF ADOPTION

Your team begin to follow up phone calls (be it answered or unanswered) with WhatsApp messages. With a 96% open & read rate, your team soon realise that this is most efficient way to communicate.

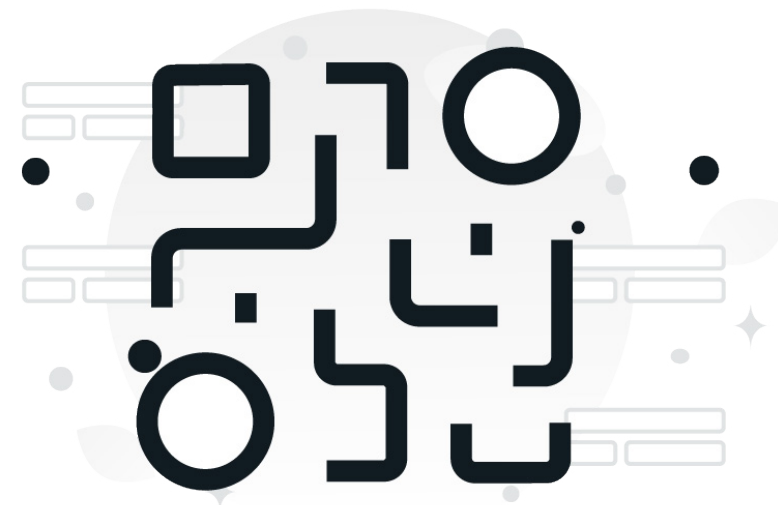
### ADOPTION STAGE 3 – INTEGRATION & AUTOMATION

Lead2WhatsApp , Voice2WhatsApp & Zapier automation drive faster outcomes to a range of enquiries, be this lead engagement, sales progressions, and just day to day issues.

Let customers start chats from...



Your Website



QR Codes



3rd Party Lead Providers



Waiting callers from your Landline Phone System



Contact Us Form



Social Media

Outbound employees can reach out

Add & Tag Contacts

### Add Contact

Use the form below to add a contact

Select Account

Butcher & Landon

Name

Mark Anthony

Phone Number

07986345321

Tags

Search tags...

Cancel Submit

Bespoke Messages

### Variables

Enter the necessary variable once you are happy click submit to send.

Template Message

Hi {{[1]}}. I just treid calling you in regardsto {{[2]}}. Can you let me know when it is convenient to speak, or alternatively, we could chat further here? Please confirm either way Thanks {{[3]}}.

1

Simon Add Tag

2

the update on your pro- Add Tag

3

Sandra Add Tag

Cancel Previous Submit

## Outbound notification templates & broadcasting

Broadcast messages to groups of consumers depending on their tag credentials assigned

Target key consumers using bespoke messages

The screenshot shows the 'Sent Template Messages' page in the Whatex dashboard. The page has a sidebar with navigation icons and a top navigation bar with the 'whatex' logo and 'Sales Team' account name. The main content area features a table of sent messages with the following columns: Name, Phone Number, Template Name, Tags, Date Time Sent, and Sent From. There are also filter dropdowns for Status, Date Range, and Account, and a search bar for template names. At the bottom, there are pagination controls showing 'Previous', '1', '2', 'Next', and 'Rows per page: 10'.

Name	Phone Number	Template Name	Tags	Date Time Sent	Sent From
Alli Micheals	+447123 456 789	natural_chat	#staff	Thu Feb 02 2023 11:21	Call43 (+447123 456 789)
Alex Rocket	+447234 567 890	natural_chat	#sales	Thu Feb 02 2023 10:57	Call43 (+447234 567 890)
Alfie Gould	+447345 678 901	natural_chat	#sales	Mon Jan 30 2023 13:49	Call43 (+77345 678 901)
Ben Stevens	+447456 789 012	natural_chat	#mark	Mon Jan 30 2023 13:47	Call43 (+447456 789 012)
Brandon Netting	+447567 890 123	phone_follow_when_ans...	#staff	Mon Jan 16 2023 23:03	Call43 (+77567 890 123)
Clerra Dixon	+447678 901 234	natural_chat	#acc	Fri Jan 06 2023 14:04	Call43 (+44890 123 456)
Clare Higgs	+447789 012 345	natural_chat	#staff	Thu Jan 05 2023 17:00	Call43 (+447901 234 567)
Callum Atwell	+447890 123 456	natural_chat	#mark	Wed Dec 28 2022 13:07	Call43 (+447132 435 645)
Dylan Fossey	+447901 234 567	natural_chat	#sales	Mon Dc 28 2022 09:30	Call43 (+447098 875 764)
Ellie Charmers	+447012 345 678	natural_chat	#sales	Wed Dec 14 2022 09:18	Call43 (+447890 123 456)

The screenshot shows the 'Add template message' form. The form has a title 'Add template message' and a subtitle 'Use the form below to add a template message. Name must be at least 5 characters and be lower case, numbers and \_ only.' The form includes the following fields: Name\* (text input with value 'phone\_followup'), Message Text\* (text area with value 'Hi {{(1)}}. Thanks for your time on the phone earlier. Just following up with a reminder to {{(2)}}. Any questions, please ask. Kind regards, {{(3)}}.'), Select a category\* (dropdown menu with value 'TRANSACTIONAL'), Add an attachment (dropdown menu with value 'No attachment'), Select a type\* (dropdown menu with value 'Subscribers only'), and Account\* (dropdown menu with value 'Sales Team'). There are also 'Cancel' and 'Submit' buttons at the bottom. An 'Example Message\*' section shows a preview of the message with placeholder text: 'Hi {{Tracey}}. Thanks for your time on the phone earlier. Just following up with a reminder to {{let us know by the end of the week if you want to proceed with the offer}}. Any questions, please ask. Kind regards, {{Steve}}.'

### Automation & Bots

#### Guide customers to the correct team


Reply\*

Thank you so much for contacting Call43

Please reply with the following keyword from the options 📌

- 👉 Demo - to schedule in a web demo of our WhatsApp messaging solution
- 👉 Sales - to chat with a member of the sales team
- 👉 Support - for any existing customers who need assistance
- 👉 Other - for all other enquiries

Automation enabled



#### Assign messages to a team or users

#### Add Automation

Use the form below to add an automation

Keyword:

Response Type:

Assignee:

- B&L SALES
- James Gelbert
- Lucy Smith
- Simon Hudges
- Jack Ryan
- Paul Gander
- Mark Jacobs
- Franklin McBride
- Debbie Swansworth

Reply: 

Automation enabled

#### Qualify with questions & capture responses

Hi P

Thank you for contacting Call 43

- 👉 Valuation - to schedule a web demo of our software solution
- 👉 View - to chat with a member of the sales team
- 👉 Report - for any customers who need assistance
- 👉 Other - for all other enquiries

To return to this menu, reply with: 0

Valuation P

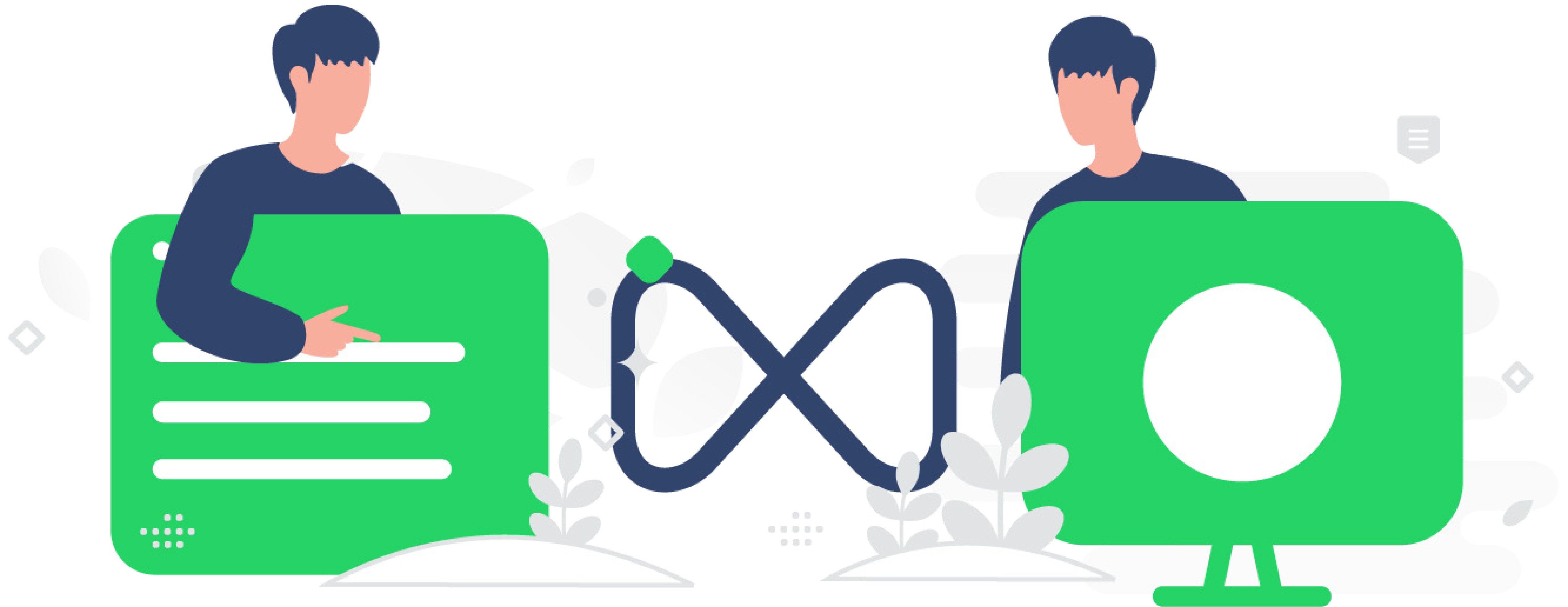
Thank you. In order for us to arrange a valuation, please can we ask you a few questions?

Please can you confirm your name? P

Polly P

and what is your full address? P

**Integrate & Automate WhatsApp with your CRM**

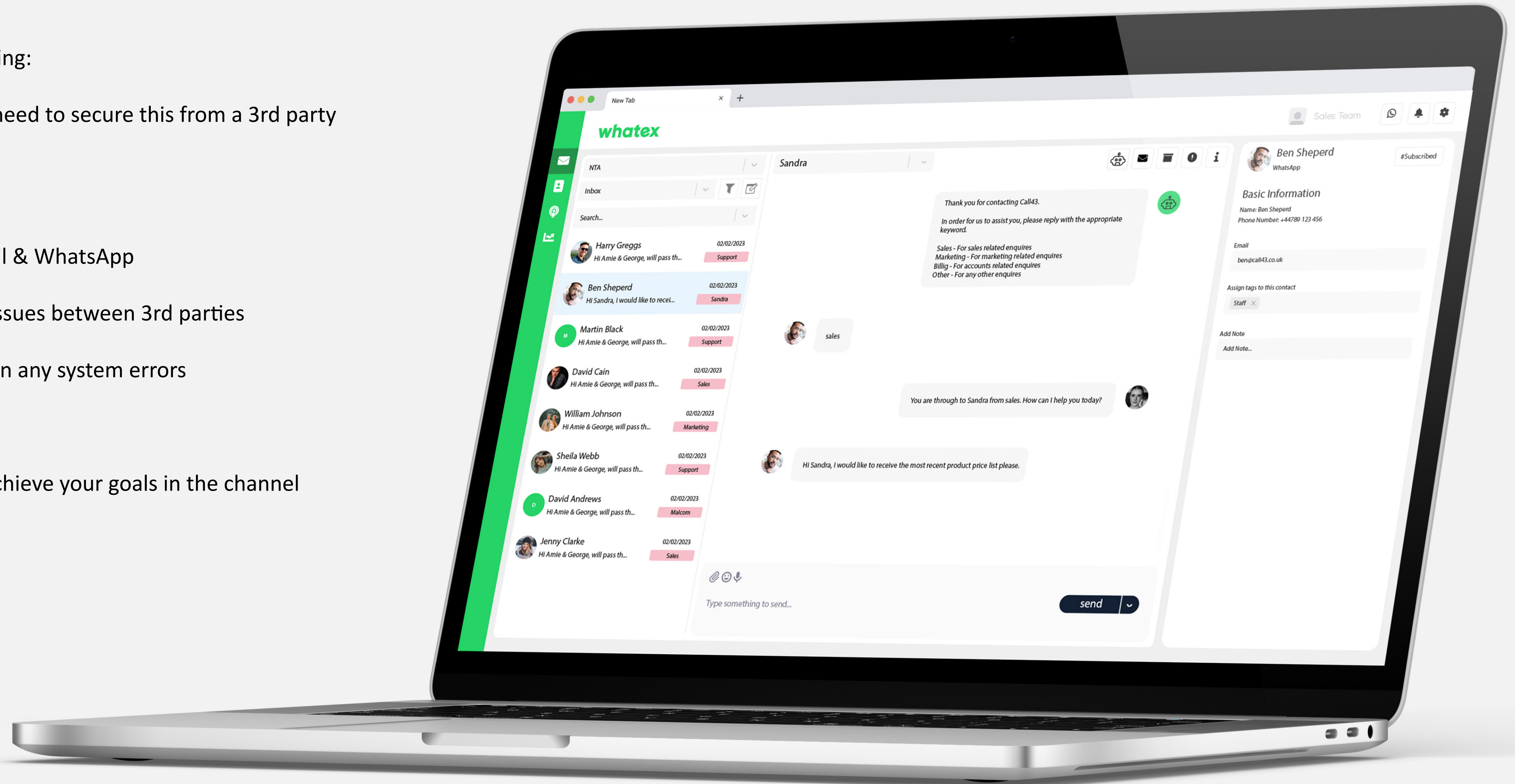


**Start conversations & view WhatsApp message history from within your CRM**

## Why Whatex?

### The communication Gap

- ✓ We provide an end-to-end solution including:
  - your WhatsApp number(s) - you do not need to secure this from a 3rd party
  - Facebook verification support
  - The software
  - Virtual training on the platform
- ✓ Our costs include support via phone, email & WhatsApp
- ✓ There are no grey areas over any system issues between 3rd parties
  - as we provide the entire solution, we own any system errors
- ✓ Our people
  - This is our value add to make sure you achieve your goals in the channel





**whatex**

[www.whatex.app](http://www.whatex.app)