# whatex

Your Gateway to Customers on WhatsApp

You will (if not already) receive an email from nta.co.uk with your password to log in to Whatex.

Ensure you have checked your junk/spam folders and that the @nta.co.uk domain is listed.

Access Whatex

To access your Whatex account via a desktop browser (preferably Google Chrome)
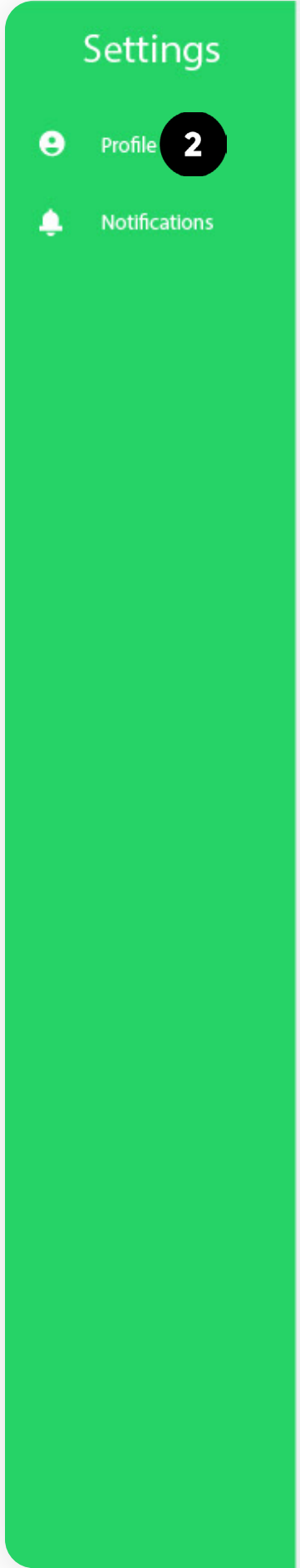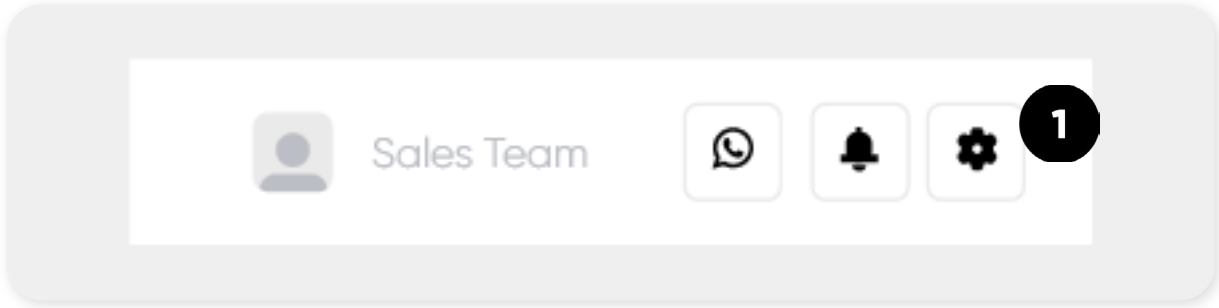please go to: portal.whatex.app

To get the Whatex Mobile App visit your App Store for IOS devices or Google Play for Android devices and search Whatex.

Download on the App Store

GET IT ON Google Play
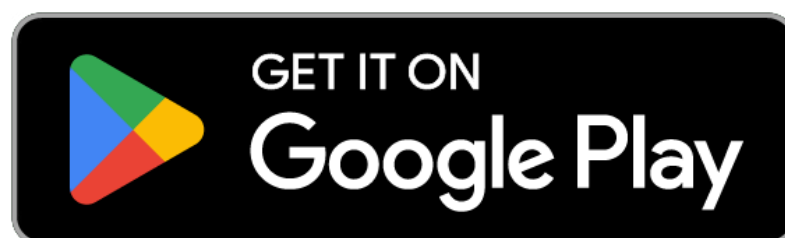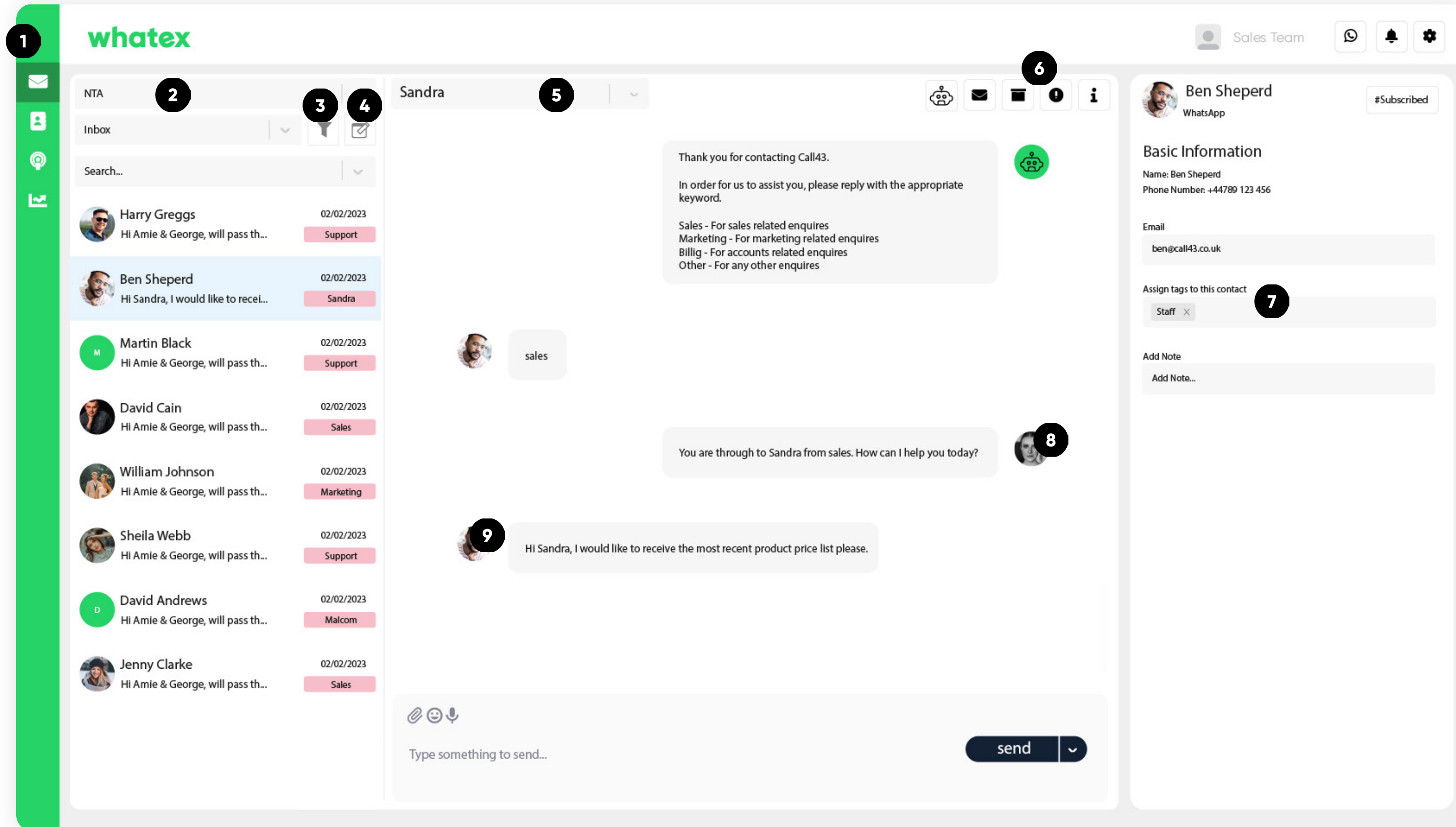
Main Chat Screen | Essential Tools

1| These are the inboxes (what the customer sees as a WhatsApp chat thread) that you and your team have access to

2| Inbox & Archive Folders

3| Filter - Allows you to view only the chats assigned to you, or chats awaiting response from the teams you are members of

4| Starts a conversation with a contact(s) or tags (bulk broadcast)

5| See who chat is assigned to, and click here to re-assign chat to colleague or team

6| Mark as unread & Archive (moves chat from inbox to Archive)

7| Tags - Find existing or create new. Good for bulk broadcasting & associating a contact to something other than their name

8| Other parties in the chat including yourself, customers, colleagues or bots

9| Your conversations with customers.

Sales Team ❶

Settings

● Profile ❷

🔔 Notifications

‹ Back to Whatex

Profile

Update Image

First Name

Sandra

Last Name

King

Email

sandra@call43.com

Team

Sales

Save

Personal Settings | Profile

1| Click on the settings icon in the top right of the screen to access settings

2| Click on Profile in the menu to open your account profile. Here you can update your avatar, adjust details and add/remove teams you are a member of

Note: Avatars are only seen by other internal users

whatex

Settings

- 👤 Profile
- 🔔 Notifications **1**

‹ Back to Whatex

Notifications

Email me when a chat is assigned to me

OFF

2

Email me when an unassied chat is not responded to within 5 minutes

OFF

Email me when chats assigned to my team(s) are not replied to after 5 minutes

OFF

Email me when my chats are not replied to after 5 minutes

OFF

Notify me in the browser when new chats arrive for me or my team

ON

Notify me in the mobile app when new chats arrive for me

ON

Notify me in the mobile app when new chats arrive for my team

ON

Notify me in the mobile app when new chats arrive whichare unassigned
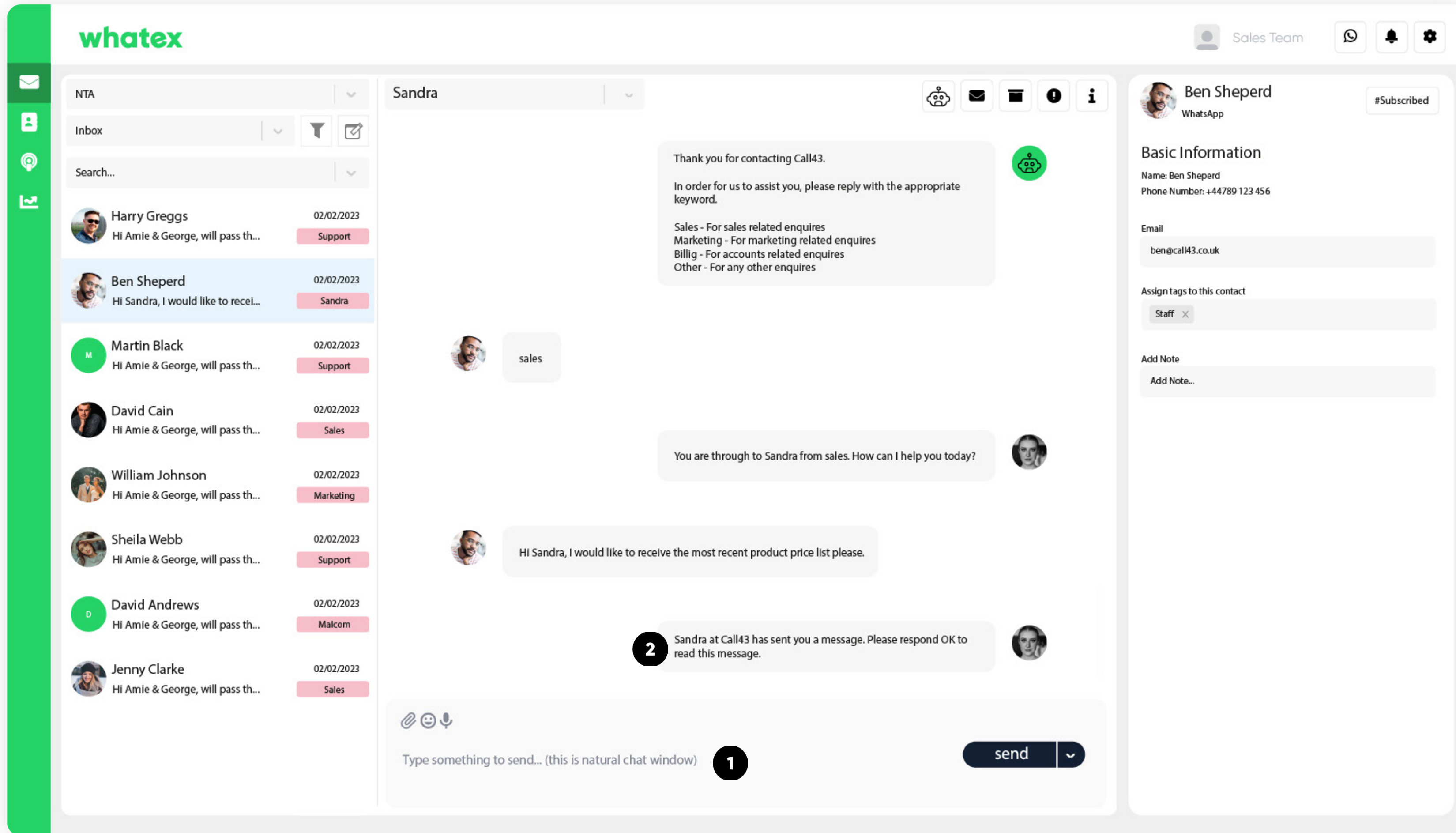
ON

Save

Personal Settings | Notifications

1| Click on Notifications in the menu to access your notifications settings

2| To change each selection, use the drop down menu to select either ON or OFF

Natural Chat

Bypasses WhatsApp's 24 hour restrictions

1| When you see this message (Type something to send... (this is a natural chat window), it means the 24 hour window with the customer has expired. However, you can free-type or send any media to your contact

2| Once you have typed your message or sent a file, the system will automatically send this message

When the customer responds, the platform will deliver the free typed messages you sent earlier

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Sales Team

Contacts

3

2 Search contact name...

Tags:
Select...

Account
Select...

	Name	Phone Number	Tags	Created On	Account	Actions
☐	Ali Micheals	+447123 456 789	#staff	Wed 11 Jan 2023	Call43	⋮
☐	Alex Rocket	+447234 567 890	#sales	Mon 20 Jan 2023	Call43	⋮
☐	Alfie Gould	+447345 678 901	#sales	Mon 03 Apr 2023	Call43	⋮
☐	Ben Stevens	+447456 789 012	#mark	Fri 09 Jun 2023	Call43	⋮
☐	Brandon Netting	+447567 890 123	#staff	Thu 18 May 2023	Butcher & Landon	⋮
☐	Cierra Dixon	+447678 901 234	#acc	Mon Jan 20 2023	Call43	⋮
☐	Clare Higgs	+447789 012 345	#staff	Mon Jan 20 2023	CRB	⋮
☐	Callum Atwell	+447890 123 456	#mark	Mon Jan 20 2023	Global Conenct	⋮
☐	Dylan Fossey	+447901 234 567	#sales	Mon Oct 21 2023	Call43	⋮
☐	Ellie Charmers	+447012 345 678	#sales	Tue Aug 22 2023	CRB	⋮

4

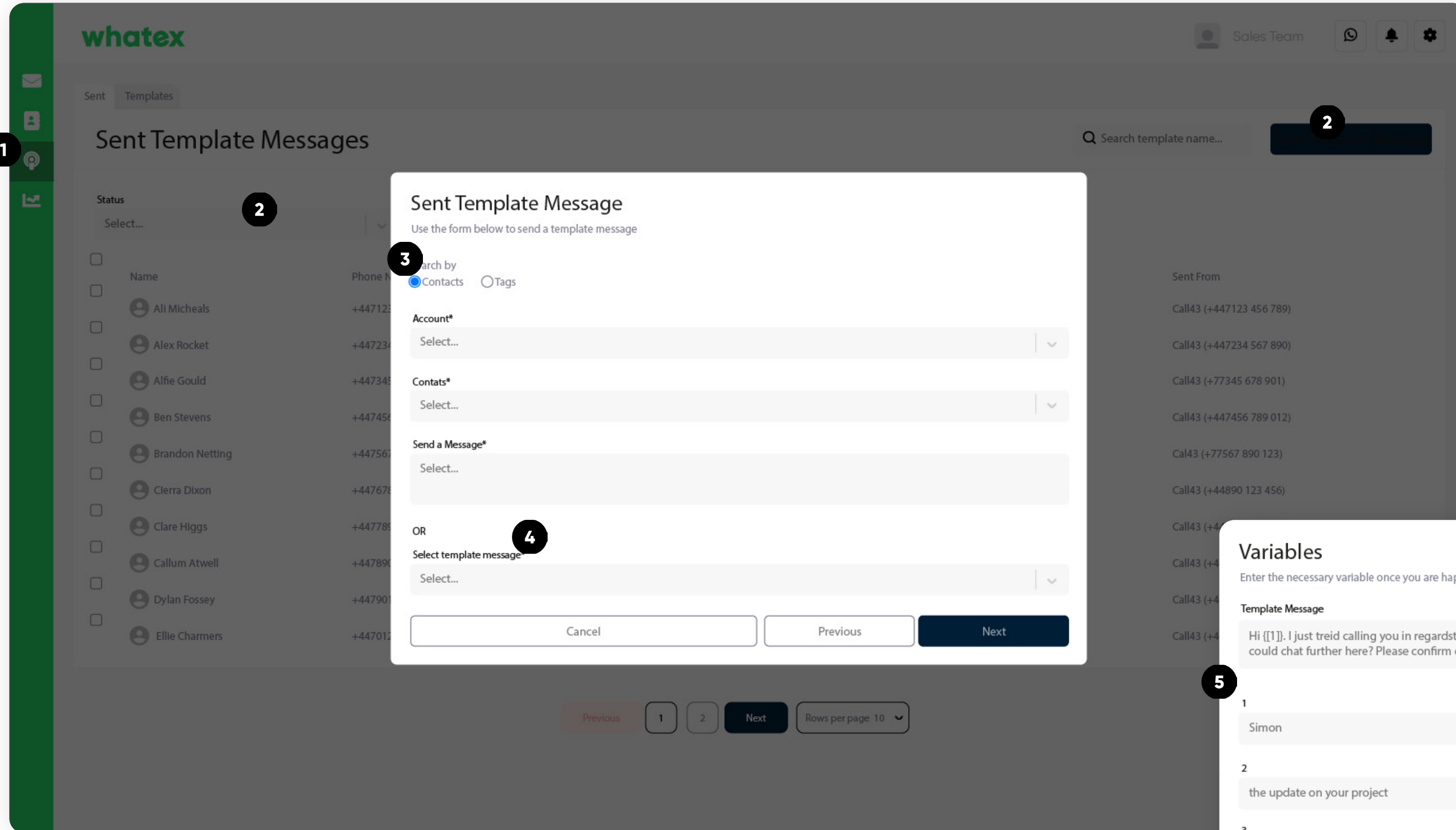Previous | 1 | 2 | Next | Rows per page 10 ▾

Contacts | Essential Tools

1| Click on the Contacts icon in the menu to access your contacts list

2| Search for contacts via tags or by name

3| Create a contact here. Note, if a customer messages you first, they will automatically be added to contacts

4| More Actions: Go to conversations or send template messages

Template Messages | Essential Tools

1| Click on the Broadcast icon in the menu to access your templates

2| Click send a template
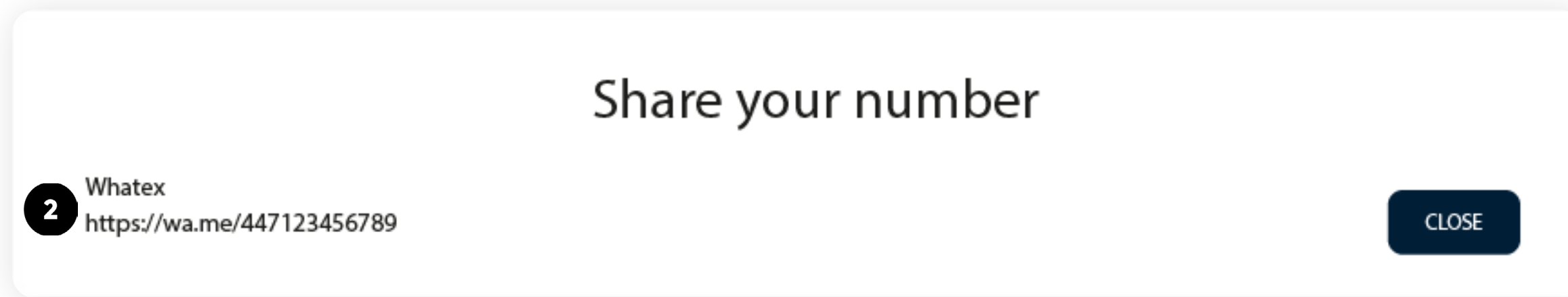
3| Search your contacts via tag or by name

4| Select the template message to start the WhatsApp conversation with a contact

5| Customise variable fields to personalise a message
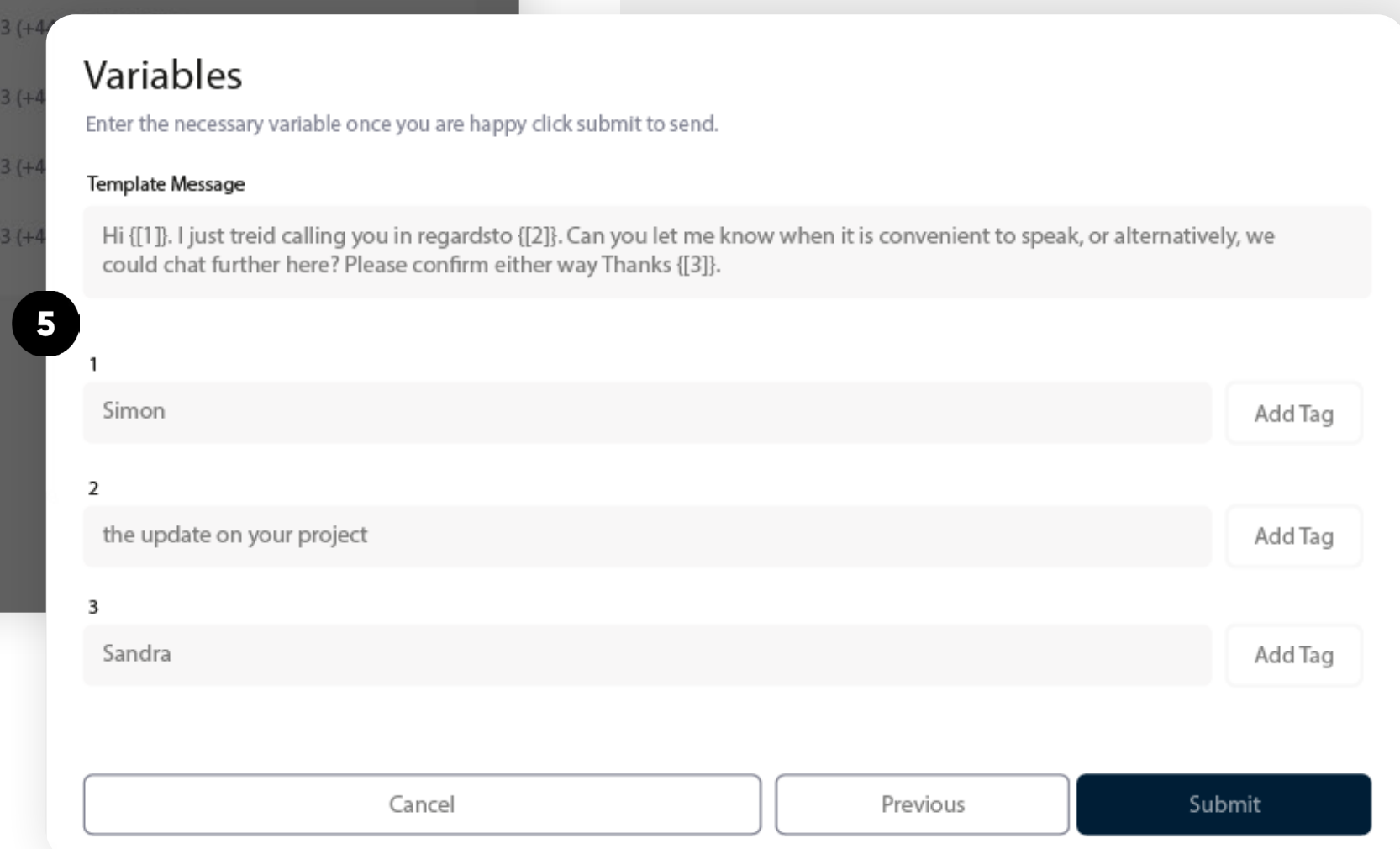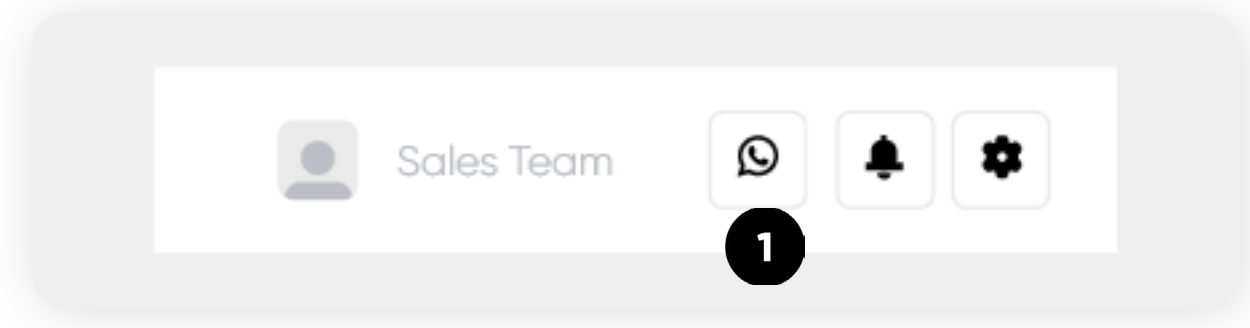
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Sales Team

1

Share your number

Whatex
2
https://wa.me/447123456789

CLOSE

Add Automation
Use the form below to add an automation

Keyword

Select...

Response Type

Assign   3

Assignee

Assign to Team (Admin)

Account

Whatex

Match Type

Keyword as word

Keyword

Select...

Automation enabled

Submit

Share your WhatsApp URL

1|Click the WhatsApp icon in the top right to view your inbox URL

2| Copy & Paste the URL to your customer

Pre-generate your customers message by using ?text= after the inbox URL

3| Set your keyword in automations to auto assign & reply to a message

Settings

- Profile
- Notifications
- Opening Hours
- Tags
- Subscribers
- Users
- Teams
- Automations

Users

Users

Search by name...   Add

First Name	Last Name	Inboxes	Email	Role
Ali	Micheals	#staff	ali@call43.co.uk	User
Alex	Rocket	#sales	alex@call43.co.uk	User
Alfie	Could	#sales	alfie@call43.co.uk	Admin
Ben	Stevens	#mark	ben@call43.co.uk	User
Brandon	Netting	#staff	brandon@bandl.com	Admin

Edit User

Use the form below to edit a user

First Name

James

Last Name

Geldart

Email

james@call43.co.uk

Team

Sales Team ✕

Role

User

Inboxes

Clevedon ✕   Portshead ✕

Cancel   Submit

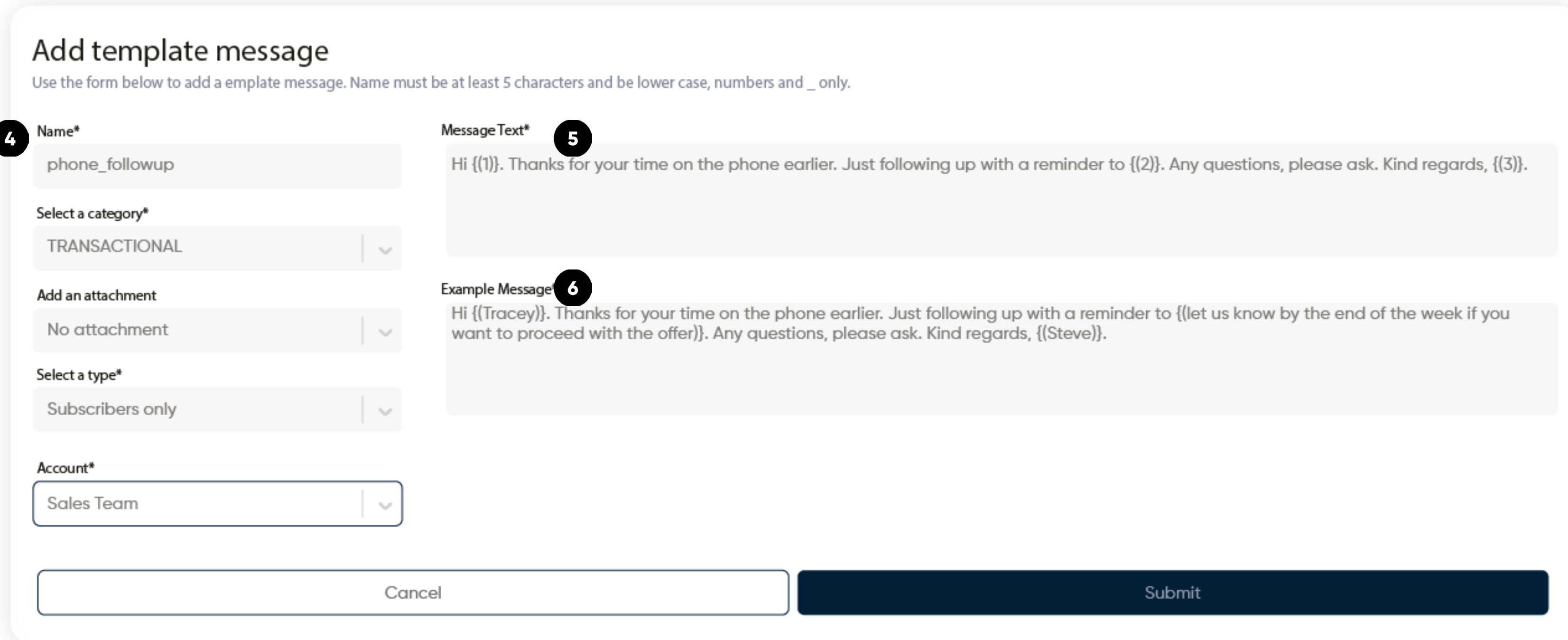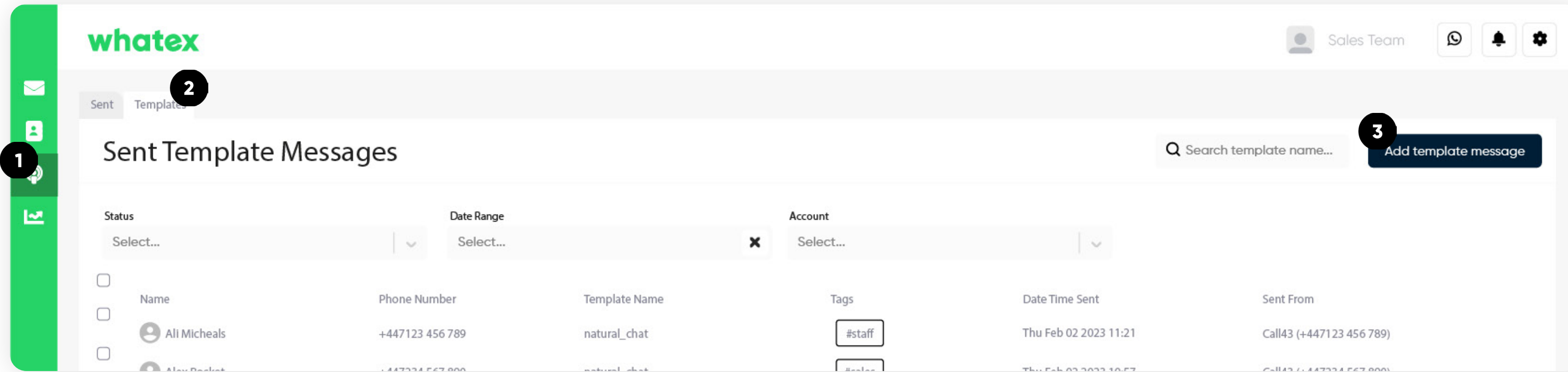## Main Admin Settings | Add/Remove Users

Only users with Admin permissions can access the following

1| Add/Remove users & Teams

2| Click the square to select the user

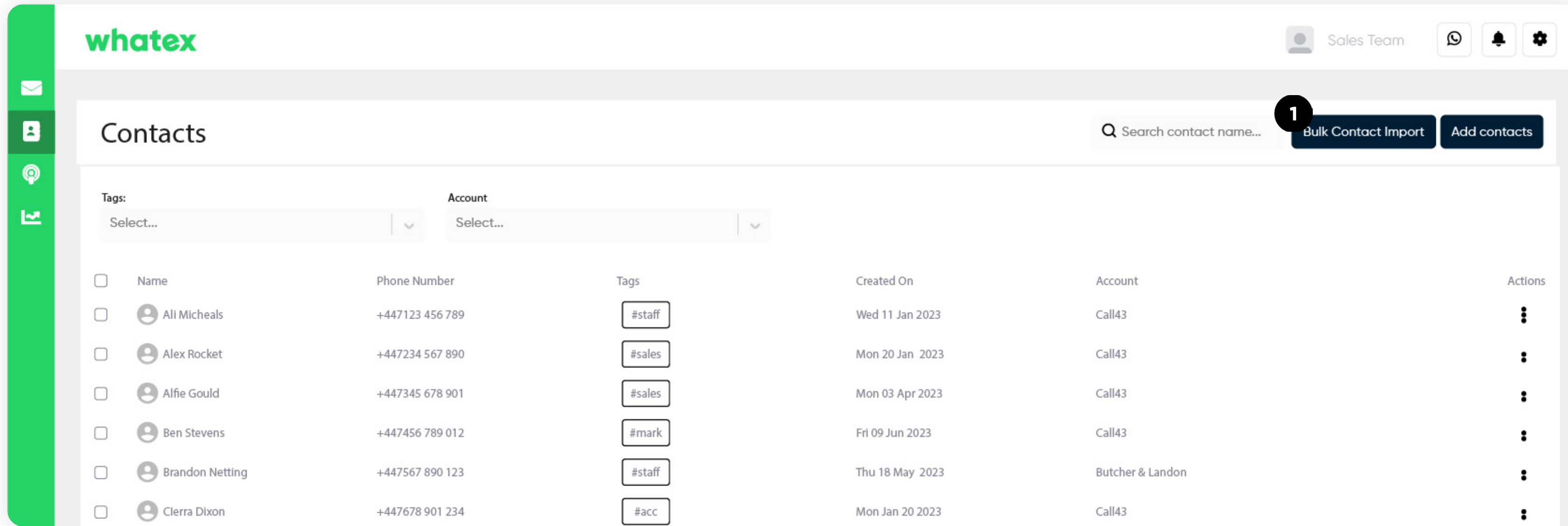**3|** Click here to add a user or edit an existing user

4| Complete the field as required and submit

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Sales Team

(2) Sent | Template

Sent Template Messages

(3) Search template name... | Add template message

(1)

Status	Date Range	Account
Select...	Select... ✕	Select...

	Name	Phone Number	Template Name	Tags	Date Time Sent	Sent From
☐	👤 Ali Micheals	+447123 456 789	natural_chat	#staff	Thu Feb 02 2023 11:21	Call43 (+447123 456 789)
☐	Alex Racket	+447334 567 800	natural_chat	#sales	Thu Feb 02 2023 10:57	Call43 (+447334 567 800)

Add template message

Use the form below to add a emplate message. Name must be at least 5 characters and be lower case, numbers and _ only.

(4) Name*

phone_followup

Select a category*

TRANSACTIONAL

Add an attachment

No attachment

Select a type*

Subscribers only

Account*

Sales Team

(5) Message Text*

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)}.

(6) Example Message*

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)}.

Cancel | Submit

Template Manager (Admins)

Only users with Admin permissions can access the following

1| Click on broadcast on the left menu

2| Select Templates

3| Create Your own template

4| Create template name along with additional information, including which inbox this template is for

5| Create your desired message using numbered variable fields. For example, {(1)} Note, you can only use numbers and they MUST be in numerical order. You cannot start at the end of a templated message with a variable field

6| Now copy and paste the message and fill in the variable fields (keep the {(1)} in place) with an actual example message. If uploading media, then submit an example file type (you'll be able to replace media). Then press submit. Within a few hours, your template should be approved or declined

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Contents

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Contacts

Sales Team

Search contact name...   **Bulk Contact Import**   **Add contacts** ①

Tags: Account:
Select...   Select...

	Name	Phone Number	Tags	Created On	Account	Actions
☐	Ali Micheals	+447123 456 789	#staff	Wed 11 Jan 2023	Call43	⋮
☐	Alex Rocket	+447234 567 890	#sales	Mon 20 Jan 2023	Call43	⋮
☐	Alfie Gould	+447345 678 901	#sales	Mon 03 Apr 2023	Call43	⋮
☐	Ben Stevens	+447456 789 012	#mark	Fri 09 Jun 2023	Call43	⋮
☐	Brandon Netting	+447567 890 123	#staff	Thu 18 May 2023	Butcher & Landon	⋮
☐	Cierra Dixon	+447678 901 234	#acc	Mon Jan 20 2023	Call43	⋮

② ③

0	Name	Mobile	Tags	Email	Note
1	Brian Jackson	+447890 123 456	Propspect, UK, End User	abc@gmail.com	Lead from Armatige
2	Sam Shead	+447901 234 567	Opportunity, UK, End User	qwerty@hotmail.com	Google Search
3	Terrance Gibson	+447012 345 678	Opportunity, UK, End User	lorem@ipsum.co.uk	Google Search

Uploading Bulk Contacts (Admins)

1|Start your bulk upload here

2|Header rows must be exactly like this (name, mobile, tags, email, note)

3|Use international format, with +447 (if UK mobile) or international equivalent

Account

Select...

Click on a row in the table to set up an automation flow

	Keyword	Account	Assigned To	Routed To	Keyword Match Type	Enabled
☐	1	Switch Motors	Switch Motors Sales	N/A	Keyword Only	✓
☐	2	Butcher & Landon	Butcher & Landon Sales	N/A	Keyword Only	✓
☐	2	Switch Motors	Switch Motors Support	N/A	Keyword Only	✓
☐	3	Switch Motors	Switch Motors Service	N/A	Keyword Only	✓
☐	4	Switch Motors	Switch Motors	N/A	Keyword Only	✓
☐	ask	Butcher & Landon	Butcher & Landon Sales	N/A	Keyword Only	✓
☐	chat	Chuck Estate	N/A	N/A	Keyword Only	✓
☐	default away response	Chuck Estate	Chuck Estate General	N/A	N/A	✓
☐	default away response	Switch Motors	Switch Motors General	N/A	N/A	✓
☐	default away response	Chuck Estate	N/A	N/A	N/A	✓

Edit Automation

Use the form below to add an automation

Keyword

3

Response Type

Assign

Assignee

Portshead Sales

Account

Butcher & Landon

Match Type

Keyword Only

Reply

Thanks for messaging the sales team!

Automation enabled

Submit

Bot's & Automations (Admins)

1|Access automations here

2|Customise default as well as specific keyword responses

3|Automate chats by replying, assigning, asking questions and capturing responses

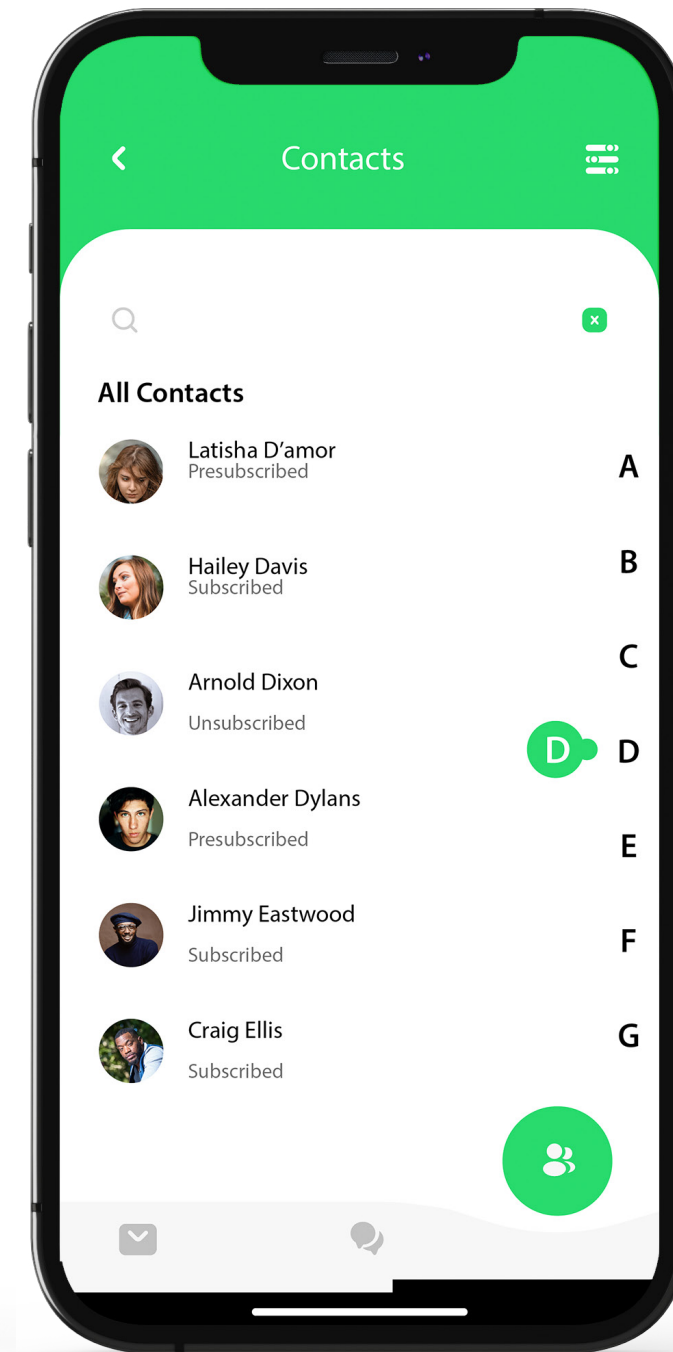**4|**Set match type, for either keyword on its own, or as a word in a sentence
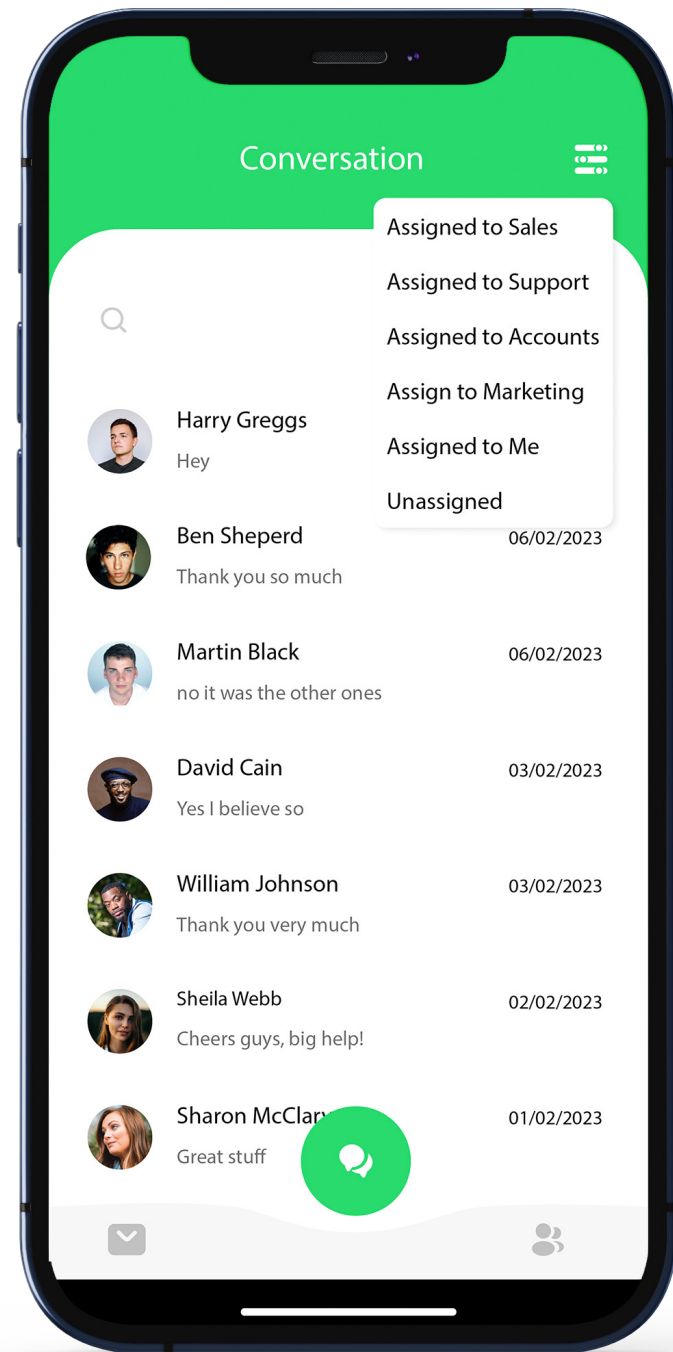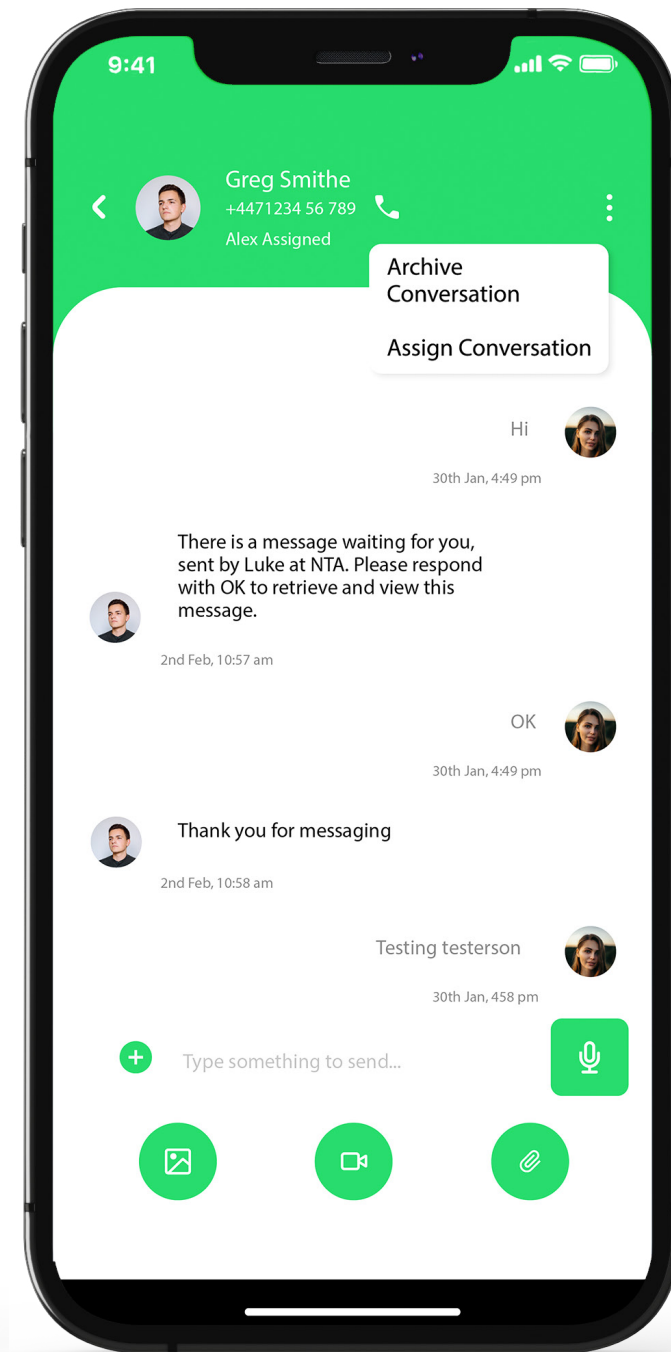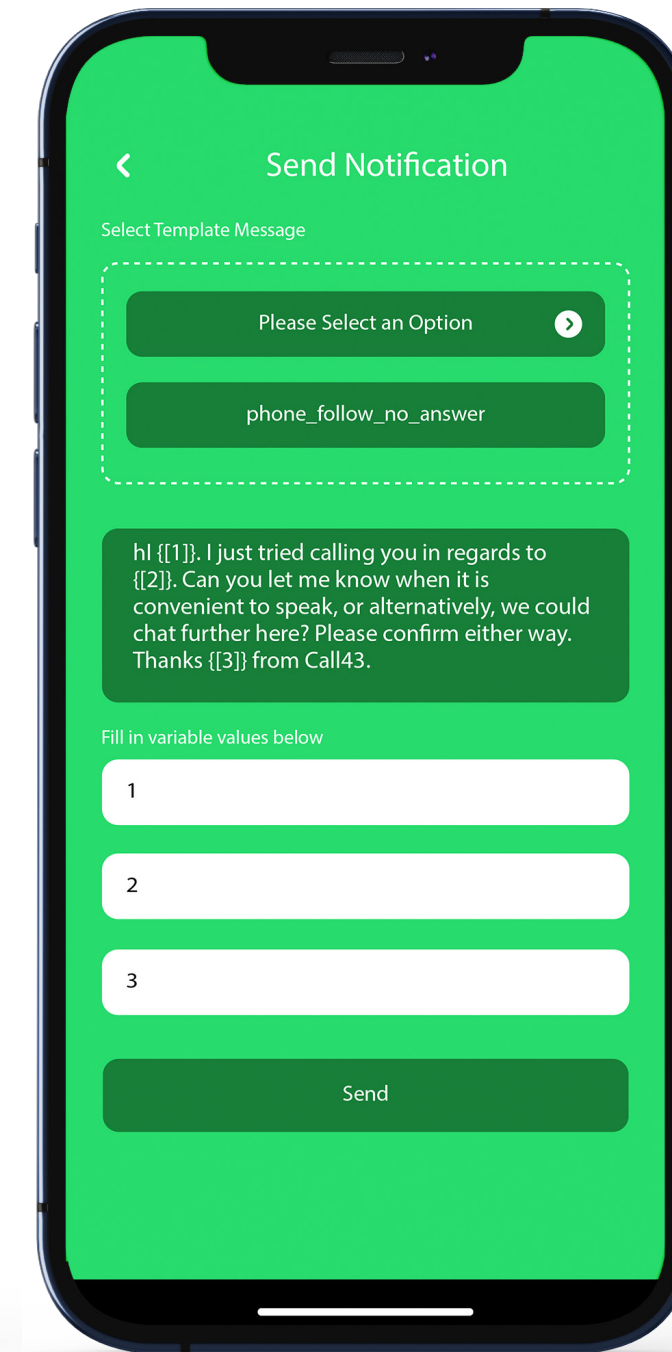
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Whatex Mobile App

1| Filter & view chats within the inbox

2| Reply to chats, archive, assign to colleagues

3| Search or create new contacts

4| Send (and personalise) template messages to start conversations