





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.





User Guide



whatex



•	Sales Team	۵ 🛊 ۵
6 T 0 i	Ben Sheperd WhatsApp	#Subscribed
	Basic Information Name: Ben Sheperd Phone Number: +44789 123 456	
	Email	
	ben@call43.co.uk	
	Assign tags to this contact Staff ×	
	Add Note	
	Add Note	
8		
nd 🗸		

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.

















<	Back to Whatex	
P	rofile	

	Update Image			
First Name				
Sandra				
Last Name				
King				
Email				
sandra@call43.com				
Team				
Sales				

Sales Team

0 ۽ ۽ 1

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



Settings	
2	< Back to Whatex
Profile	Notifications
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 main the makile and when now chate arrive for me
	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

Personal Settings | Notifications

Save

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



whatex						Sales Team	¢ ف
NTA		Sandra		ۍ ا	= 0 i	Ben Sheperd	#Subscribed
Inbox	T					WhatsApp	
Search	~			Thank you for contacting Call43. In order for us to assist you, please reply with the appropriate	෯	Basic Information Name: Ben Sheperd	
Harry Greggs Hi Amie & George, will pass th	02/02/2023 Support			keyword. Sales - For sales related enquires Marketing - For marketing related enquires Billig - For accounts related enquires		Phone Number: +44789 123 456 Email ben@call43.co.uk	
Ben Sheperd Hi Sandra, I would like to recei	02/02/2023 Sandra			Other - For any other enquires		Assign tags to this contact Staff \times	
Martin Black Hi Amie & George, will pass th	02/02/2023 Support		sales			Add Note Add Note	
David Cain Hi Amie & George, will pass th	02/02/2023 Sales			Very see through to Condex from order Using on the lower to dou?	6		
William Johnson Hi Amie & George, will pass th	02/02/2023 Marketing			You are through to Sandra from sales. How can I help you today?			
Sheila Webb Hi Amie & George, will pass th	02/02/2023 Support		Hi Sandra, I would like to recei	ve the most recent product price list please.			
David Andrews Hi Amie & George, will pass th	02/02/2023 Malcom		6	Sandra at Call43 has sent you a message. Please respond OK to			
Jenny Clarke Hi Amie & George, will pass th	02/02/2023 Sales		2	read this message.			
		Ø ☺ ♥ Type something to	send (this is natural chat w	indow)	send 🗸		

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





whatex				
Contacts				
Tags: Select 2	Account	~		
Name	Phone Number	Tags	Created On	Accoun
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	Butche
Clerra 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
Dylan Fossey	+447901 234 567	#sales	Mon Oct 21 2023	Call43
Ellie Charmers	+447012 345 678	#sales	Tue Aug 22 2023	CRB

Previous

1

Rows per page 10 🗸 Next



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





	whetev		Sales Team	Template Messages Esse
	Sent Templates		Sales Team 🔊 🌲 🏟	1 Click on the Broadcast icon in the templates
	Sent Template Me	essages	Q Search template name	2 Click send a template
Let	Status 2	Sent Template Message		
	Select	Use the form below to send a template message		3 Search your contacts via tag or by
	Name	Phone N OTags	Sent From	4 Select the template message to s ⁻
	Ali Micheals	+44712: +447234 Select	Call43 (+447123 456 789)	conversation with a contact
	Alfie Gould	+44734£ Contats*	Call43 (+77345 678 901)	5 Customise variable fields to perso
	Ben Stevens	Select +44745t	Call43 (+447456 789 012)	- ,
	Brandon Netting	+447567 Select	Cal43 (+77567 890 123)	
	Clerra Dixon	+447678	Call43 (+44890 123 456) Call43 (+4	
	Callum Atwell	+447890 Select template message	Call43 (+4 Variables	
	Dylan Fossey	+44790'	Call43 (+4 Call43 (+4 Template Message	bmit to send.
	Ellie Charmers	+447012 Cancel Previous	Next Call43 (+4 Hi {[1]}. I just treid calling you in regardsto {[2]}. Can could chat further here? Please confirm either way	n you let me know when it is convenient to speak, or alternatively, we Thanks {[3]}.
			5	
		Previous 1 2 Next Rows per page 10 •	Simon	Add Tag
			2 the update on your project	Add Tag
			3	
			Sandra	Add Tag
			Cancel	Previous Submit

ential Tools

e menu to access your

y name

start the WhatsApp

onalise a message







Whatex 2 https://wa.me/447123456789

Add Automation

Use the form below to add an automation

Keyword		Keyword
Select		Select
Response Type		
Assign 3		
Assignee		
Assign to Team (Admin)	~	
Account		
Whatex		Automation enabled
Match Type		
Keyword as word	~]	

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

CLOSE



		Settings				
	•	Profile	Users			
	۰	Notifications	Users			
	0	Opening Hours	2 First Name	Last Name	Inboxes	Email
	•	Tags	Ali	Micheals	#staff	ali@call43.co.uk
	٢	Subscribers	Alex	Rocket	#sales	alex@call43.co.uk
	:	Users	Alfie	Could	#sales	alfie@call43.co.uk
1	:24	Teams	D Ben	Stevens	#mark	ben@call43.co.uk
	÷	Automations	Brandon	Netting	#staff	brandon@bandl.com



Use the form below to edit a user

First Name	Team
James	Sales Team ×
Last Name	Role
Geldart	User
Email	Inboxes
james@call43.co.uk	Clevedon × Portshead ×

 \sim

Q Search by name	3 Add
Role	
User	
User	
Admin	
User	
Admin	

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



whatex					Sales Team
Sent Templates					
Sent Template N	lessages			Q Se	Add template message
Status	Date Range		Account		
Select	v Select		X 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)
Alay Darkat	· 447554 F47 000	natural abat	Healer	Thu Fak 03 3033 10.57	C-II43 / 44733 4 EE7 0001
dd template messa the form below to add a emplate m	ge nessage. Name must be at least 5 cha	aracters and be lower case,	, numbers and _ only.		
ne*	Message Text*	5			
hone_followup	Hi {(1)}. The		ne phone earlier. Just followin	g up with a reminder to {(2)}. Any	questions, please ask. Kind regards, {(3)}.
lect a category*					

Name*		Message Text* 5
phone_followup		Hi {(1)}. Thanks for your time on the phone earlier. Just following up with a reminder
Select a category*		
TRANSACTIONAL	~	
Add an attachment		Example Message ¹
No attachment	~	Hi {(Tracey)}. Thanks for your time on the phone earlier. Just following up with a rem want to proceed with the offer)}. Any questions, please ask. Kind regards, {(Steve)}.
Select a type*		
Subscribers only		
Account*		
Sales Team	~	
	Cance	el

ninder to {(let us know by the end of the week if you

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

Submit



_					
	whatex				
8	Contacts				ľ
@	Tags:	Account			
	Select	Select	\sim		
	Name	Phone Number	Tags	Created On	A
	Ali Micheals	+447123 456 789	#staff	Wed 11 Jan 2023	C
	Alex Rocket	+447234 567 890	#sales	Mon 20 Jan 2023	C
	Alfie Gould	+447345 678 901	#sales	Mon 03 Apr 2023	C
	Ben Stevens	+447456 789 012	#mark	Fri 09 Jun 2023	C
	Brandon Netting	+447567 890 123	#staff	Thu 18 May 2023	В
	Clerra Dixon	+447678 901 234	#acc	Mon Jan 20 2023	C

0	2 Name	Mobile	Tags	Email	Note
1	Brian Jackson	+447890 123 456 3	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

	Sales Team	9 • •
Q Search contact name	1 Bulk Contact Import	Add contacts
Account		Actions
Call43		i
Call43		:
Call43		:
Call43		:
Butcher & Landon		:
Call43		:

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



	Accoun Sele				Click on a row in the table to set up an automa	ation flow	
		Keyword	Account	Assigned To	Routed To	Keyword Match Type	Enabled
		1	Switch Motors	Switch Motors Sales	N/A	Keyword Only	~
1		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 2	Switch Motors	Switch Motors	N/A	Keyword Only	~
		ask	Butcher & Landon	Butcher & Landon Sales	N/A	Keyword Only	~
	0	chat	Chuck Estate	N/A	N/A	Keyword Only	~
		default away response	Chuck Estate	Chuck Estate General	N/A	N/A	~
	0	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		Reply	
3		Thanks for messaging the sales team!	
Response Type 3			
Assign			
Assignee			
Portshead Sales	~		
Account			
Butcher & Landon	~	Automation enabled	
Match Type 4			
Keyword Only			
			S

User Guide

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





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

 Send Notification
Select Template Message
Please Select an Option >
phone_follow_no_answer
hl {[1]}. I just tried calling you in regards to {[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]} from Call43.
Fill in variable values below
1
2
3
Send

