

# LeadSquared WhatsApp Integration with Route Mobile

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Thank you for extending your interest towards LeadSquared WhatsApp Integration with Route Mobile. Please find below step by step guide for your reference.

# **1. Feature Overview**

LeadSquared offers WhatsApp integration to help users communicate with their leads. Our WhatsApp functionality supports integrations through different solution providers like Route Mobile. This article will help you set up WhatsApp messaging through your LeadSquared account using Route Mobile as your service provider.

# 2.Prerequisites

If you're not familiar with LeadSquared's WhatsApp integration, see <u>WhatsApp Business Messaging</u> <u>Connector</u>. For frequently asked questions, see <u>WhatsApp Business FAQs</u>.

- 1. Reach out to us at <a href="mailto:support@leadsquared.com">support@leadsquared.com</a> & <a href="mailto:alliances@routemobile.com">alliances@routemobile.com</a> regarding Route Mobile's WhatsApp integration.
- 2. Get an Approved WhatsApp Business Number and Account.
- 3. Submit Message Templates for Approval.

# **3.Installation**

To install the WhatsApp Messaging Connector -

- 1. From the main menu, navigate to Apps>Apps Marketplace.
- 2. Search for WhatsApp Business, and click Install.
- 3. Alternatively, you'll find the connector listed under the Messaging tab.
- 4. Once installed, place your cursor over and click Configure.
- 5. On the Configure WhatsApp Business pop-up, click Add Number.







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# 4. Configuration

Once the connector is installed, add and configure your WhatsApp phone numbers to the connector. To do this, enter

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## 4.1 Basic Details

Configure WhatsApp Business
< Back
1 Basic Details         2 Service Provider         3 Authentication         4 Converse Settings         5 Advanced Settings
WhatsApp Business Number*
+91 (India) v 9321821008
Account Name*
RML Test
Allow Lead Generation on incoming message  Lead Source Select
Next

Field	Description
WhatsApp Business Number	Select the country code, and provide your WhatsApp business number. This field is mandatory.
Account Name	Provide a relevant name for your connector. This field is mandatory.
Allow Lead Generation on incoming message	Click O to allow automatic lead creation when you receive messages from unknown mobile numbers.
Lead Source	From the dropdown, select a lead source for your leads.

Once you're done, click Next.



#### **4.2 Service Provider**

Configure WhatsApp Business < Back 2 Service Provider 1 Basic Details 3 Authentication 4 Converse Settings **5** Advanced Settings Service Provider Selection ValueFirst ValueFirst D Infobip Gupshup Zoko Zoko Route Mobile WhatsApp Client Kaleyra Previous

Then, from the available options, select Route Mobile, and click Next.



### 4.3 Authentication Set-up

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WhatsApp Number*							
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Username*							
RMLUAT8							
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Field	Description
Base URL	Paste the base URL in this field. Use the following https://whatsapp-api-clients.leadsquaredapps.com/transform/66605/ routemobile
WhatsApp Number	Paste your WhatsApp business number in this field, without including any special characters such as '+', etc. You will have to include the country code of the number though. An example of a number would be "9199010XXXXX", where 91 is the country code. Contact your Account Manager from Route Mobile to get your WhatsApp business number.
Username	Paste your Route Mobile username here. Contact your Account Manager from Route Mobile to get Username. Contact Email id: alliances@routemobile.com
Password	Paste your Route Mobile Password here. Contact your Account Manager from Route Mobile to get Password.

Once you're done entering all the details, click Next.



#### 4.4 Converse Settings

LeadSquared Converse is an instant messaging feature that allows you to have real-time conversations with your leads via WhatsApp.

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To integrate LeadSquared Converse with WhatsApp, complete the following steps -

- i. On the Converse Settings tab, toggle the Enable Converse 🤍 slider.
- ii. Under User Access, grant permissions to users who can communicate with leads through the LeadSquared Converse.
  - Based on Role From the Search and Select Users dropdown, select the LeadSquared user roles that can send messages through LeadSquared Converse.
  - Advanced (User Level) Based on the value present in the selected user boolean field (e.g., For user Sam, the "Is Employee" field contains "Yes"), the user will be able to send messages through LeadSquared Converse. From the Select User Field dropdown, select a relevant boolean field.
- iii. Functionality The following additional settings must be configured -
  - Approved Templates Enable this functionality to allow your users to send approved WhatsApp templates to your leads.
  - Unapproved Templates Enable this functionality to allow your users to send unapproved WhatsApp templates to your leads. These can only be sent if the 24-hours service window is active.

- Notify Lead Owner\* When enabled, only lead owners will get notifications of the WhatsApp messages a lead sends. When disabled, all logged-in users will receive notifications of these WhatsApp messages.
- Sending Rich Media Enable this functionality to allow your users to send media files in the WhatsApp messages.

#### Note:

- Message notifications are only sent to one user, i.e., either the Lead Owner or to the user (other than the Lead Owner) that sent the WhatsApp message to the lead. When the Notify Lead Owner setting is enabled, only the Lead Owner will get notified, while the user who sent the message will not get a notification.
- If you enable the Send Rich Media option, you must also enable the Approved Templates option. This ensures that you can add your media files to a template when messaging your leads.

	Configure WhatsApp Business
Marketplace 6	< Back
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Most Popular	Enable Converse To send real time WhatsApp messages on web to increase customer engagement and boost sales performance
Recently Added	User Access:
Analytics	O Based on Role (RAdvanced (User Level)
	Specify a custom boolean field to manage/restrict users for this particular feature*
Call Tracking	Select User Field
Chat	Functionality
Contact Centre	Specify what functionalities are to be availed on converse integration
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#### 4.5 Advanced Settings

#### In this screen, enter the following details

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Basic Details     Service Provider     Auth	entication 4 Converse Settings 5 Advanced Settings
Activity Mapping*	
WhatsApp Message	~
Default WhatsApp Number Field*	Default Country Code* 💿
Select 🗸	Select ~
Enable Rich Media Template Support  Compliance Type OptOut  OptIn	
WhatsApp Opt-Out* 💿	
Select a filed	~
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- Activity Mapping A LeadSquared activity field to your WhatsApp messages. This is the activity that will be posted every time a WhatsApp message is sent or received.
- **Default WhatsApp Number Fields** The number you set as the default phone number will be automatically selected when you're sending a WhatsApp message to a lead. You can also select other numbers that are available from the Add Another Number dropdown.
- **Default Country Code** The default country code will be used to send messages to a phone number that's stored in a custom field, if no country code is listed.
- Enable Rich Media Template Support If you want to include media files in your WhatsApp message, you must enable the Slider slider.
- **Compliance Type** Here, you can select the compliance type for the WhatsApp template, by choosing either WhatsApp Opt-out or Opt-in.
- WhatsApp Opt-out From the dropdown, select a lead field for the WhatsApp opt-in/opt-out functionality. Your leads can opt-in or out of receiving WhatsApp messages on the basis of this field.

Note: You must create a custom lead field of boolean type to map to the WhatsApp opt-out functionality. For example, you may create a custom lead field called "WhatsApp Opt Out". Leads for whom the field is selected/checked won't receive WhatsApp messages.

Click Save & Close when you're done.

- If your credentials are correct, you'll see the success message highlighted below.
- If they were incorrect, the integration would fail.

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# **5.Conversing with Leads via WhatsApp**

Integrating Converse with <u>LeadSquared's WhatsApp</u> connector will enable your users to have real-time conversations with your leads through WhatsApp. Using template messages, you'll be able to attach and send media files (such as images, documents, etc.) in your conversations. To know more, refer to <u>LeadSquared Converse</u>.

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# 6. Next Steps

Once the connector is successfully installed, you can proceed to add WhatsApp templates and finally message your leads. For details, see <u>Adding WhatsApp Templates to LeadSquared</u>.