FREE EBOOK · BUSINESS AUTOMATION

WhatsApp Business Automation: A Practical Guide

How small businesses can set up, organise and automate WhatsApp to save time, confirm orders and sell more

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Introduction

This guide is for small business owners, online store owners, service providers and their teams who already talk to customers on WhatsApp and want to do it in a more organised, professional and automated way. You do not need to be technical. Some later chapters mention developers and integrations, but every concept is explained in plain English so you can make good decisions and brief anyone who helps you.

For many businesses, WhatsApp is where customers ask about prices, check delivery times, confirm orders and complain when something goes wrong. When messages are handled manually from one phone, replies get slow, orders get lost and the owner becomes the bottleneck. Automation does not replace the human touch; it handles the repetitive parts so that you and your team can focus on the conversations that need a person.

By the end of this guide you will be able to:

- Choose between the WhatsApp Business app and the WhatsApp Business Platform (Cloud API)
- Set up a complete, trustworthy business profile and catalogue
- Use quick replies, greeting messages, away messages and labels to save hours each week
- Build broadcast lists and collect customer opt-in properly
- Understand message templates and the main message categories
- Plan chatbots and automatic order confirmations
- Connect WhatsApp with Shopify or WooCommerce, including cash on delivery (COD) confirmation flows
- Follow the rules that protect your number from restrictions and bans
- Measure whether your WhatsApp efforts are actually working

A note on change: WhatsApp and Meta update features, limits, policies and pricing regularly. This guide explains the principles. Always check the platform's current settings, policies and pricing before you build or spend money.

Chapter 1: Choosing the Right WhatsApp Option

The WhatsApp Business app

The WhatsApp Business app is a free app for Android and iPhone, similar to normal WhatsApp but with business features. It is designed for small businesses that manage chats themselves.

Key features include a business profile, a product catalogue, quick replies, greeting and away messages, labels, broadcast lists and the ability to link a small number of extra devices. It is ideal when one person or a small team handles messages directly and volumes are manageable.

The WhatsApp Business Platform (Cloud API)

The WhatsApp Business Platform is Meta's offering for businesses that need to send and receive messages through software rather than only through a phone app. The Cloud API is the version hosted by Meta. Businesses usually access it directly through a developer setup or through a Business Solution Provider (BSP) that offers a ready-made dashboard.

It allows automated messages triggered by your store, chatbots, shared team inboxes, integrations with your CRM and much higher message volumes. Business-initiated messages generally require pre-approved templates and are charged according to Meta's pricing model, which varies by country and message category. Check Meta's current pricing page for your market.

Side-by-side comparison

Feature	WhatsApp Business app	WhatsApp Business Platform (Cloud API)
Cost to start	Free app	Usage-based charges, plus any provider fees
Setup	Install and register a number	Meta business account, verification, developer or provider
Team access	A few linked devices	Many agents through a shared inbox tool
Automation	Basic greeting, away and quick replies	Chatbots, triggered messages, integrations
Best for	Small shops, freelancers, low volume	Growing stores, high volume, automated order flows

How to decide

Ask yourself these questions:

1. Do you receive more messages than one or two people can comfortably handle?
2. Do you want messages sent automatically when an order is placed, shipped or delivered?
3. Do several team members need to answer from the same number at once?
4. Do you need to connect WhatsApp to your store, CRM or other software?

If you answered "no" to most of these, start with the free app and master its features. If you answered "yes" to two or more, the Platform is likely worth exploring. Many businesses start with the app and move to the Platform as they grow.

> Tip: A phone number used on the Platform generally cannot be used at the same time in the normal app in the same way. Before migrating, check the current migration rules and back up any chats you need.

Chapter 2: Setting Up a Professional Profile

Why the profile matters

Your profile is often the first thing a new customer checks to decide whether you are a real, trustworthy business. A complete profile reduces basic questions and builds confidence.

Profile setup steps

1. **Business name.** Use your real trading name, consistent with your website and social pages. Avoid adding keywords or slogans to the name.
2. **Profile photo.** Use your logo or a clear storefront photo. Make sure it is readable at a small size.
3. **Category.** Choose the category that best matches your business, such as Shopping and Retail or Professional Services.
4. **Description.** Write two or three sentences explaining what you sell, where you deliver and how to order.
5. **Address and hours.** Add your address if customers visit, and accurate business hours.
6. **Website and email.** Link your website and a business email.
7. **Social links.** Where the app allows it, link to your Instagram or Facebook page.

Example description

"Handmade leather wallets, belts and bags, made in Lahore. Nationwide delivery in 3 to 5 working days with cash on delivery. Message us to order or browse our catalogue."

Verification and display names

On the Platform, display names are reviewed against Meta's guidelines, and businesses may be able to apply for verification badges or subscription-based verification depending on what Meta currently offers. Requirements change, so check the current options in your Meta Business settings.

Chapter 3: Catalogue, Quick Replies, Greetings, Away Messages and Labels

These built-in features are where most small businesses can save the most time with the least effort.

The catalogue

The catalogue lets customers browse your products inside WhatsApp.

1. Open Business tools and choose Catalogue.
2. Add each product with a clear photo, name, price, short description and product link if you have a website.
3. Group items into collections such as "Wallets", "Belts" and "Gift Sets".
4. Keep prices and stock status up to date. An outdated catalogue causes frustration.

When a customer asks "What do you have?", you can share a collection link instead of sending a dozen photos. If you use Shopify or Meta Commerce Manager, you may be able to sync products rather than adding them by hand. Check the current integration options.

Quick replies

Quick replies are saved messages you can insert by typing a shortcut, usually starting with a slash.

Useful quick replies for most businesses:

- **/price** for a price list or a link to the catalogue
- **/delivery** for delivery areas, charges and timeframes
- **/payment** for accepted payment methods
- **/return** for your return and exchange policy
- **/location** for your address and a map link
- **/thanks** for a thank-you message after an order

Write each one in a friendly tone and keep it short. Review them every few months so they stay accurate.

Greeting messages

A greeting message is sent automatically when a new customer messages you for the first time, or after a period of no contact.

Example: "Hello and welcome to [Business]. Thanks for your message. You can browse our catalogue here: [link]. Please tell us the product name and your city, and we will reply shortly."

Away messages

Away messages tell customers when you are not available. You can usually schedule them outside business hours.

Example: "Thanks for messaging [Business]. Our team is available 10am to 8pm, Monday to Saturday. We have received your message and will reply as soon as we are back."

Labels

Labels let you tag chats and organise them. A simple label system:

- **New enquiry**
- **Awaiting payment**
- **Order confirmed**
- **Shipped**
- **Complaint**
- **Repeat customer**

At the end of each day, filter by "New enquiry" and "Complaint" to make sure nobody has been forgotten.

Daily time saved: a worked example

Imagine a store that answers 40 delivery questions a day and spends about 1.5 minutes typing each answer. That is 40 × 1.5 = 60 minutes a day. With a quick reply, each answer might take around 15 seconds, so 40 × 0.25 = 10 minutes. The saving is 50 minutes a day, or roughly 50 × 26 = 1,300 minutes, about 21 hours, over a 26-day working month. These are illustrative figures, but they show why quick replies are worth setting up on day one.

Chapter 4: Broadcast Lists, Opt-In and Message Templates

Broadcast lists in the app

A broadcast list sends one message to many contacts at once, while each person receives it as an individual message. In the Business app, a broadcast is generally only delivered to people who have saved your number in their contacts. Check the app's current limits on list size and frequency.

Good uses for broadcasts:

- New collection or restock announcements
- Genuine limited-time offers
- Important updates such as holiday closures

Poor uses:

- Daily promotions to everyone
- Messages to people who never asked to hear from you

Why opt-in is essential

Opt-in means the customer has clearly agreed to receive messages from you on WhatsApp. WhatsApp's policies require businesses to obtain opt-in before sending business-initiated messages, especially on the Platform. Beyond the rules, people who chose to hear from you are far less likely to block or report you.

Ways to collect opt-in

1. **Checkout checkbox.** Add an unticked box at checkout: "Send me order updates and offers on WhatsApp."
2. **Website widget.** A "Chat with us on WhatsApp" button with a clear note about what messages they will receive.
3. **In-chat confirmation.** When a customer messages you, ask: "Would you like to receive new arrivals and offers here? Reply YES to join."
4. **In-store or packaging.** A QR code on a card in each parcel with a short explanation.

Always explain what type of messages they will get and how to stop them, for example "Reply STOP at any time". Keep a record of who opted in and when.

Message templates on the Platform

On the Platform, the rules depend on who starts the conversation:

- When a customer messages you, a customer service window opens (commonly 24 hours from their last message), during which you can reply freely.
- Outside that window, or when you start the conversation, you must use a **template** that Meta has approved.

A template is a pre-written message with optional variables, such as the customer's name or order number, plus optional buttons.

Example template: "Hi {{1}}, thank you for your order {{2}} of Rs {{3}}. Please confirm your order by tapping a button below."

Message categories

Meta groups templates into categories, which affect approval and pricing. The main categories are generally:

- **Utility:** messages about a specific transaction or account, such as order confirmations, shipping updates and payment reminders
- **Marketing:** promotions, offers, new products, re-engagement and anything else not covered by the other categories
- **Authentication:** one-time passcodes for logging in or verifying identity

Service conversations, where you reply to customers who contacted you, are handled differently. Choosing the correct category matters: a promotional message submitted as utility is likely to be reclassified or rejected. Category names, rules and prices change, so check Meta's current documentation.

Writing templates that get approved

- Be clear about who you are and why you are messaging
- Keep the language polite and specific
- Avoid misleading urgency, threats or excessive capital letters
- Make variables meaningful, and do not start or end a message with a bare variable
- Include an easy way to opt out on marketing messages

Chapter 5: Chatbots and Automated Order Messages

What a chatbot should and should not do

A chatbot is an automated system that responds to messages. A good small business chatbot:

- Answers common questions instantly, at any hour
- Collects details such as name, city and product before a human takes over
- Shows menus or buttons so customers can pick options
- Hands over to a person whenever the customer asks or the question is complex

A chatbot should not trap customers in loops, pretend to be a person, or make promises your team cannot keep.

Two types of chatbot

1. **Menu or rule-based bots** follow fixed paths. "Reply 1 for prices, 2 for delivery, 3 to speak to our team." They are predictable and easy to set up.
2. **AI-assisted bots** use language models to understand free-text questions and respond more naturally. They can be very helpful, but they need clear instructions, approved information sources and human oversight so they do not give incorrect prices or policies.

Planning a simple bot flow

Map your flow on paper before building it.

1. Customer sends any message.
2. Bot greets them and shows options: Browse products, Track my order, Delivery and payment, Talk to a person.
3. **Browse products** sends the catalogue link or top collections.
4. **Track my order** asks for the order number and replies with the latest status from your store.
5. **Delivery and payment** shares delivery areas, timeframes, charges and payment methods.
6. **Talk to a person** labels the chat and notifies your team, with a message telling the customer when to expect a reply.

Automated order messages

Order messages are among the most useful automations because customers actively want them. A typical sequence:

1. **Order received:** confirms the items, total and delivery address
2. **Order confirmed:** sent after payment or COD confirmation
3. **Shipped:** includes the courier name and tracking link
4. **Out for delivery:** a reminder to keep cash ready if paying on delivery
5. **Delivered:** a thank-you and an invitation to share feedback

Each of these is usually a utility template on the Platform, triggered automatically by your store or courier system.

Chapter 6: Integrating with Shopify and WooCommerce, Including COD Confirmation

How integrations work

An integration connects your store to WhatsApp so that events in the store, such as a new order, trigger messages automatically. The common routes are:

- **Store apps and plugins.** Shopify apps or WooCommerce plugins that connect to the WhatsApp Business Platform, either directly or through a provider.
- **Business Solution Providers.** Companies that provide Platform access, a team inbox, template management and store connectors.
- **Custom builds.** A developer uses store webhooks and the Cloud API to build exactly the flow you need.

Review the features, pricing, support and data-handling terms of any app or provider before installing. Check the current listing in the Shopify App Store or WordPress plugin directory.

Basic integration steps

1. Choose your Platform access route: direct Cloud API or a provider.
2. Create or connect your Meta Business account and register your business phone number.
3. Install the relevant Shopify app or WooCommerce plugin and connect it to your WhatsApp account.
4. Create and submit your templates for order received, confirmed, shipped and delivered.
5. Map store events to templates, for example "Order created" sends the "Order received" template.
6. Add a WhatsApp opt-in checkbox at checkout and make sure phone numbers include the country code.
7. Place several test orders and check every message, variable and button.

Why COD confirmation matters

In markets such as Pakistan, cash on delivery is very common. The risk is fake or impulsive orders: a parcel is shipped, the customer refuses it, and the store pays delivery and return charges for nothing. Confirming COD orders on WhatsApp before dispatch helps filter these out.

A COD confirmation flow

1. Customer places a COD order on the website.
2. The store automatically sends a utility template: "Hi Ali, thanks for your order #1045 for Rs 3,800. Please confirm so we can dispatch it." with buttons **Confirm order** and **Cancel order**.
3. If the customer taps **Confirm order**, the store tags the order as confirmed and it moves to packing.
4. If they tap **Cancel order**, the order is cancelled and stock is released.
5. If there is no reply after a set time, for example 12 hours, a reminder is sent.
6. If there is still no reply, a team member calls the customer or the order is held.

Most COD apps let you set these timings and automatically tag orders in Shopify or update the WooCommerce order status. Check the app's current settings.

Worked example: the value of COD confirmation

Imagine a store that ships 300 COD orders a month. Without confirmation, suppose 60 parcels are refused. If each refused parcel costs Rs 250 in delivery plus Rs 150 in return charges, the loss is 60 x (250 + 150) = 60 × 400 = Rs 24,000 a month, not counting packaging and staff time.

Now suppose WhatsApp confirmation catches 30 of those orders before dispatch, and messaging costs around Rs 10 per order (an illustrative figure; check current pricing). The cost is 300 × 10 = Rs 3,000. The saving is 30 × 400 = Rs 12,000. The net benefit is 12,000 - 3,000 = Rs 9,000 a month. Your real numbers will differ, so run this calculation with your own refusal rate, courier charges and messaging costs.

Abandoned cart reminders

Some integrations can send a reminder when a customer leaves items in their cart. These are usually marketing messages, so they require opt-in and are typically charged at marketing rates. Send one helpful reminder, not a series of pushy ones.

Chapter 7: Policies and Avoiding Bans

Why numbers get restricted

WhatsApp may limit, restrict or ban a number when it receives signals that a business is sending unwanted messages. Common causes include:

- Messaging people who never opted in
- Many users blocking or reporting your number
- Sending the same promotional message to large numbers of unknown contacts
- Using unofficial, modified WhatsApp apps or bulk-sending tools that are not part of the official Platform
- Selling products or services that WhatsApp's Commerce Policy does not allow

Rules to follow

1. **Use only official tools.** Use the official Business app or the Business Platform through Meta or an approved provider. Avoid unofficial bulk senders.
2. **Always get opt-in** before sending business-initiated messages.
3. **Respect opt-outs** immediately. If someone says stop, remove them.
4. **Send relevant messages.** Fewer, more useful messages lead to fewer blocks.
5. **Follow the Commerce Policy.** Read WhatsApp's Business Policy and Commerce Policy and check your products are allowed.
6. **Do not buy contact lists.** People on bought lists did not agree to hear from you.
7. **Protect customer data.** Store phone numbers securely and only use them for the purposes customers agreed to.

Quality rating and messaging limits

On the Platform, your phone number has a quality rating based on how recipients respond to your messages, and there are messaging limits on how many unique customers you can start conversations with in a set period. Good quality and steady growth can raise your limits; complaints can lower them. Monitor these in WhatsApp Manager and check Meta's current rules.

Warning signs to act on

- Your quality rating drops
- Template messages are paused or rejected repeatedly
- Customers reply asking "Who is this?" or "How did you get my number?"

If you see these, pause marketing messages, review your opt-in process and make your messages more relevant before sending again.

Chapter 8: Measuring Results

What to track

Choose a few measures that link WhatsApp activity to business results:

- **Response time:** how quickly customers get a first reply
- **Conversations started:** new enquiries per day or week
- **Conversion rate:** the share of enquiries that become orders
- **COD confirmation rate:** confirmed orders divided by COD orders
- **Refusal rate:** refused parcels divided by dispatched COD parcels
- **Broadcast or campaign results:** messages delivered, read, clicked and orders generated
- **Opt-out and block signals:** a rising number is an early warning

Simple tracking setup

1. Use labels in the Business app, or tags and reports in your Platform provider, to mark enquiries and orders.
2. Add tracking parameters (UTM tags) to website links you send on WhatsApp so Google Analytics can show which visits came from WhatsApp.
3. Use a separate discount code for WhatsApp campaigns to count orders.
4. Record weekly numbers in a spreadsheet.

Worked example: is a campaign worth it?

Imagine you send a new-arrivals message to 1,000 opted-in customers. 80 click the link and 12 place orders with an average value of Rs 4,000. Revenue is 12 × 4,000 = Rs 48,000. The click rate is 80 / 1,000 = 8 percent, and the order rate from clicks is 12 / 80 = 15 percent. If the messages cost, say, Rs 20 each including provider fees (check current pricing), the cost is 1,000 × 20 = Rs 20,000. If your profit margin is 40 percent, profit is 48,000 × 0.40 = Rs 19,200, which is less than the Rs 20,000 cost. In this example the campaign lost a little money, which tells you to target a smaller, more engaged segment or improve the offer. Measuring like this stops you repeating campaigns that do not pay.

Review routine

Every month, review your numbers, read a sample of real conversations, update quick replies and bot answers, remove outdated templates and plan the next month's messages.

Quick-Start Checklist

☐ Decide between the Business app and the Business Platform

☐ Complete your profile: name, logo, description, hours, address and website

☐ Add your products to the catalogue with photos and current prices

☐ Create at least six quick replies for common questions

☐ Turn on a greeting message and a scheduled away message

☐ Set up labels and review open chats daily

☐ Add an opt-in checkbox at checkout and record consents

☐ Build a broadcast list only from opted-in customers

☐ Write and submit utility templates for order updates

☐ Map a simple chatbot flow with a clear "talk to a person" option

☐ Connect WhatsApp to your Shopify or WooCommerce store

☐ Set up a COD confirmation flow with a reminder and a call fallback

☐ Read WhatsApp's Business and Commerce Policies

☐ Track response time, confirmation rate and refusal rate weekly

About DAD Technologies

DAD Technologies is a Pakistan-based digital agency helping businesses grow with ecommerce, digital marketing, web development and AI automation. Explore our free tools and guides at dadtechnologies.com, or contact us for a free consultation.