Requesting custom WhatsApp Message Templates

About message templates and the 24 hour session

In order to protect the WhatsApp user experience, Facebook has guidelines that prevent businesses from using the platform to advertise to, spam, or harass users. One of the ways they enforce this is to restrict freeform messaging between the business and WhatsApp user to 24 hour sessions.

If the business account wants to begin a session, it's required to use pre-approved message templates to contact the customer. This way Facebook can vet ahead of time that businesses initiate conversations with customers according to their guidelines. WhatsApp provides three default templates, and Movius will provide an additional set of default templates, but refer to the following instructions if you want additional templates.

Message template approval process

1. All message templates are submitted to each account individually.
2. WhatsApp supports up to 250 templates per account.
3. It takes up to 2 days for WhatsApp to review new template message requests.

Guidelines

You can find the guidelines that must be followed to get message templates approved in the Twilio Docs (https://www.twilio.com/docs/whatsapp/tutorial/send-whatsapp-notification-messages-templates). However, be aware that there are limits to our use of variable parameters, discussed below.

Every message template will have to match a certain category. Most of our users only use the below categories:

Category	Description
Account Update	Let customers know about updates to their accounts
Alert Update	Send important updates or news to customers
Appointment Update	Send confirmations, reminders, or other updates to customers about their appointments.

Auto-Reply	Primarily used to categorize opt in messages
Issue Resolution	Respond to questions, concerns, or feedback from customers about your business.

NOTE: **Opt in messages are subject to the same approval process as other message templates, even though they don't appear in the message templates in the WhatsApp interface.**

Variable Parameters

Template messages use placeholder values that can be replaced with dynamic content inside double curly braces **({{...}})** when the message is sent:

NOTE: **We can only support variable parameters that can be hardcoded ahead of time. For example, we can use a variable parameter representing the name of the MultiLine user. But we can't support conditional variable parameters such as the contact's name or the date and time of an appointment.**

Best Practices

The most subjective part of the review process is whether or not a message contains promotional or marketing content. *[[{1}]]* is a variable that would be replaced in the messages as the name of the MultiLine user (Example: "Tara).

Approved Examples	Rejected Examples
"*{{1}}*, we have a new update regarding your account. Please respond to this message to receive it. Have a nice day!"	*[{{1}}]* Your {{2}} appointment is coming up on {{3}} *Why: can't support variables that we can't hardcode ahead of time.*
[{{1}}] I've emailed you the documents to complete. Please fill them out and send back to us as soon as you can. Let me know if you see it or need me to resend it over.	*[{{1}}]* Reminder: {{2}} *Why: Variables must have an obvious purpose, will be flagged promotional* *[{{1}}]* your appointment is coming up tomorrow *Why: Grammar or spelling mistakes will get rejected*
[{{1}}] Hi! Just wanted to remind you of our meeting tomorrow. Please reply back if you need to reschedule.	*[{{1}}]* I've emailed you the latest market report. Have a look and give me a call if you want to discuss. *Why: Not a transaction, will be flagged as promotional*
[{{1}}] Would you be willing to share your feedback on your experience with us? We'd greatly appreciate it! Please reply back with 'yes' and I'll send you the link.	

Formatting

Review the Twilio Docs (https://www.twilio.com/docs/whatsapp/message-features) on formatting for information on how you can format template messages. Example: *bold text* creates **bold text**.

Types of Rejection

Rejection type	Description
PROMOTIONAL	WhatsApp has deemed this to contain promotional or marketing content.
TAG_CONTENT_MISMATCH	The language and/or template category don't match the template content.
INVALID_FORMAT	Placeholders or other elements formatted incorrectly.

Revising rejected examples

Sometimes less is more. Because of the restrictions on message template content, think of how you can communicate your message in a way that's transactional, but covers your range of scenarios.

Rejected message 1: *[{{1}}]* Just wanted to follow up on my previous message.
Rejected message 2: *[{{1}}]* Trying to touch base with you over text as I couldn't connect with you either by phone or email.

Revised and accepted: *[{{1}}]* I am trying to follow up on my previous message. I wanted to check if there is any update from you.

Rejected message 1: *[{{1}}]* With such recent volatility in the markets, please let me know if you have any questions I can help with.
Rejected message 2: *[{{1}}]* I wanted to see if we can catch up soon. From what we have talked about, there are some new products that I think you'll find interesting.   Let me know when you're available for a quick call.

Revised and accepted: *{{1}}*, I have a new information regarding your account. Please respond to this message to schedule a call. Thank you!"

Rejected message: *[{{1}}]* As we roll into a new year, I wanted to see if we could sit down for an annual portfolio review?

Revised and accepted: *{{1}}*, I have an update regarding your annual portfolio review. Please respond to this message to receive it. Hope you're well!!"

Opt In Template Messages

Because Opt In messages are a first contact with a customer, we must submit them for the same approval process as other message templates. However, Opt In messages won't appear in your list of template messages to send customers.

WhatsApp Opt-In requirements and tips

1. Requirements
    1. Businesses must clearly state that a person is opting in to receive messages from the business over WhatsApp
    2. Businesses must clearly state the business' name that a person is opting in to receive messages from
2. Tips
    1. Explicitly call out the types of messages a person is opting into
    2. Provide instructions for how customers can opt out and honor these requests
    3. Monitor your quality rating, especially when rolling out new opt-in methods

Custom Template Guidelines

You can customize the Disclaimer portion of Opt-In Messages, as described below.

WhatsApp Opt-in: Opt-in Message sent to guest for MT case

This is a conversation with %s. Per company policy, you must provide your consent to send and receive messages. ==[DISCLAIMER A]== *Please press the button below to carry on with the conversation.*

Example: This is an invitation to the conversation with %s. Per company policy, you must provide your consent to send and receive messages. ==Use of this Electronic Communication platform is subject to Terms of Service: client.com/terms.== *Please press the button below to start the conversation.*

WhatsApp Opt-in: Opt-in confirmation notification to guest for MT case

Thank you. You are now in conversation. ==[DISCLAIMER B]== *If you want to leave this conversation at any time, reply OPT OUT.*

Example: Thank you. You are now in conversation. This communication may contain confidential and/or privileged information. ==Use of this Electronic Communication platform is subject to Terms of Service: client.com/terms.== *If you want to leave this conversation at any time, reply OPT OUT.*

WhatsApp Opt-in: Opt-in message sent to guest for MO case

This is an invitation to the conversation with %s. Per company policy, you must provide your consent to send and receive messages. ==[DISCLAIMER C]== *Please press the button below to start the conversation.*

Example: This is an invitation to the conversation with %s. Per company policy, you must provide your consent to send and receive messages. ==Use of this Electronic Communication platform is subject to Terms of Service: client.com/terms.== *Please press the button below to start the conversation.*

> See Getting consent to message using WhatsApp Opt-In Flow (https://help.moviuscorp.com/help/getting-consent-to-message-using-whatsapp-opt-in-flow) for more information on WhatsApp Opt-In flow for conversations initiated by the MultiLine User.
>
> See WhatsApp: AI-enabled Incoming Message Routing (https://help.moviuscorp.com/help/whatsapp-ai-enabled-incoming-message-routing) for more information on Opt-In Flow for conversations initiated by WhatsApp users.

Troubleshooting

If submitted message templates get rejected, but we feel it is in error, it is possible to appeal the decision by submitting a ticket to Twilio. We can also try resubmitting the rejected template with a few minor tweaks.