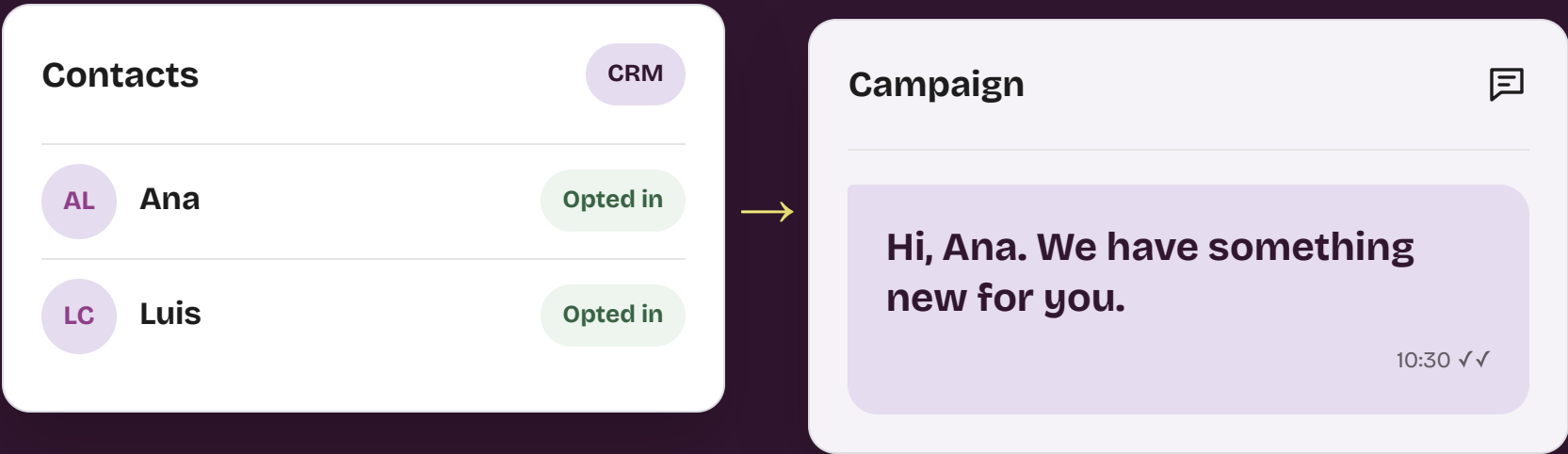


Your first campaign, step by step.

Contacts, balance and WhatsApp campaigns in a 9-page guide.



Illustrative example

Find CRM in the menu

Open Contacts, Campaigns and WhatsApp balance from there.

Check your contacts

Your WhatsApp and order customers are already there.

Messages go out in your business's name.

02 / YOUR AUDIENCE

Choose who to message.

People who messaged you on WhatsApp or bought from you already appear in Contacts.

Contacts

CRM

AL Ana

Opted in

LC Luis

Opted in

✓ Opted in → Campaign

Illustrative example

01 Check their permission

Only contacts with opt-in, permission to receive messages, get campaigns.

02 Save a segment

In Advanced filters, combine purchases, tags or other conditions. Give the filter a name and save it. The group updates automatically.

03 Have a separate list?

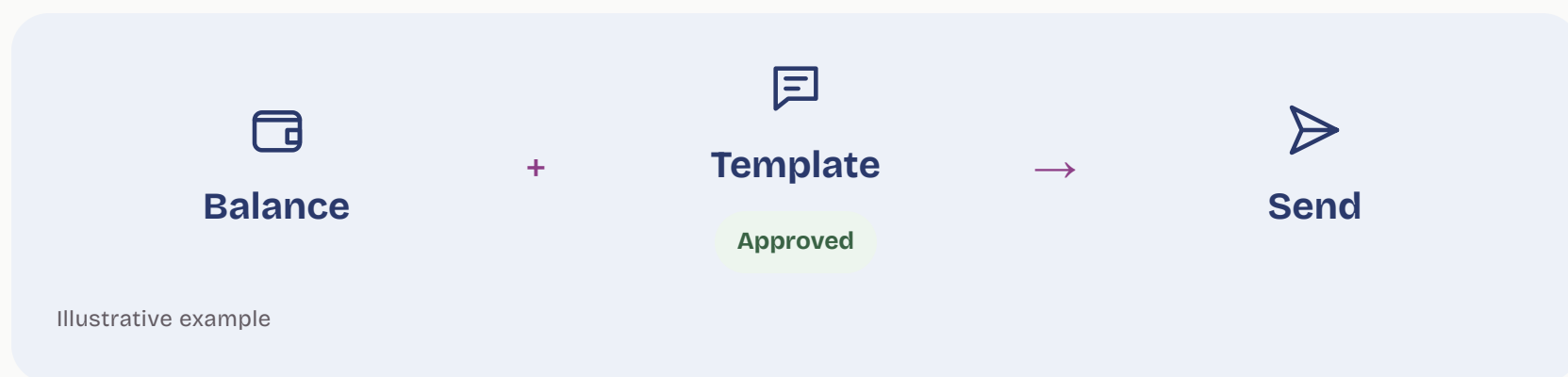
Contacts → Create contact → Import CSV. Include names and phone numbers with country codes. Importing does not grant permission to send campaigns.

An existing phone number updates the contact. It does not create a duplicate.

03 / BEFORE SENDING

Balance ready. Message approved.

Before sending, you need balance and a template approved by Meta.



01 Top up WhatsApp balance

It is prepaid and separate from your plan. Delivered messages are deducted from the balance. Check the rates: they vary by customer country and template category.

02 Choose a template

Campaigns → Templates → Sync with Meta. Need another one? Use New template and submit it for approval.

03 Check its data

Pending or rejected templates cannot be used. Templates that need external data can only be sent via API.

You can enable auto-reload and set a monthly cap.

Your campaign in 3 steps.

Campaigns → Create campaign → One-off send.

Preview

✓

120

38

ReceiveExcluded

Campaign

Hi, Ana. We have something new for you.

10:30 ✓✓

Illustrative example

- 01

Message and audience

Name your campaign, choose a template and a saved segment, or set the criteria now.
- 02

Check the preview

Review the message, how many contacts receive it and how many are excluded. Compare the estimated cost with your balance.
- 03

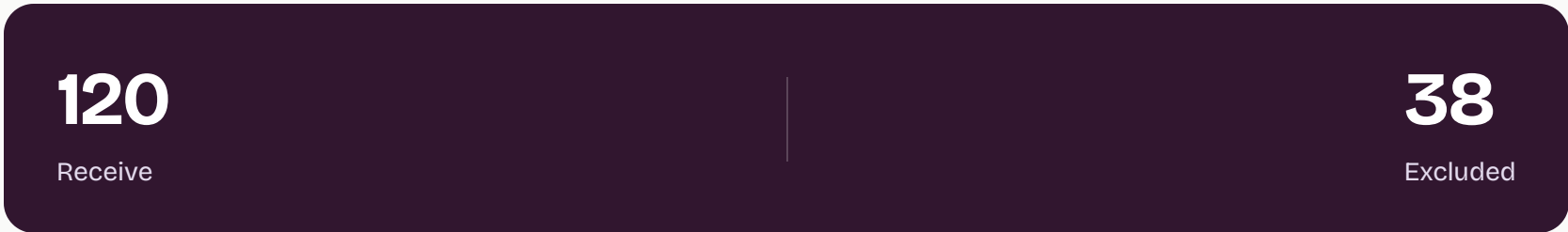
Choose when it sends

Send now or schedule a date and time. Set a sending window if you want to limit the hours.

With no contacts or insufficient balance, Send is blocked and shows the reason.

Why someone is left out.

The preview shows how many receive the campaign and why others are excluded.



Illustrative example

- 01 **No permission**

Opted out of your campaigns.
- 02 **Not marketable**

Has no recorded permission to receive campaigns.
- 03 **Frequency cap**

Defaults: 1 per week and 4 per month across your other campaigns. Follow-ups in this same sequence do not count.
- 04 **In another campaign**

They are already in another send.
- 05 **Paused conversation**

Your team has paused the AI Seller in their conversation.
- 06 **Missing data**

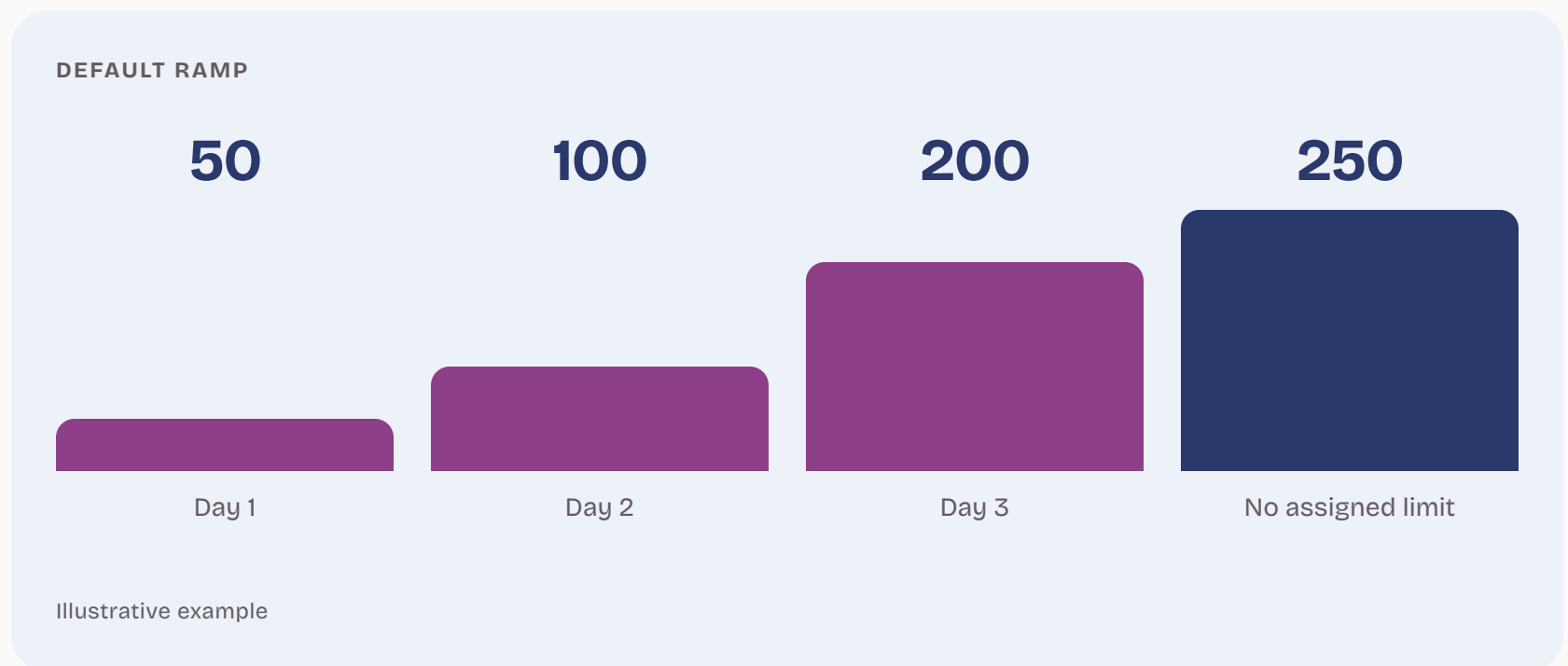
A field the template needs, such as their name, is missing.

After sending, the same reasons appear with the actual counts.

06 / SENDING PACE

Messages go out in batches.

A new account starts with a limit that increases each day.



01 50 → 100 → 200 → **your account limit**

Default ramp. It grows up to the limit Meta assigns. Until Meta sets one, the limit used is 250.

02 The last 24 hours count

All numbers in your account share the allowance. It does not reset at midnight. Waiting messages retry every hour by default.

03 Hours depend on the campaign

A one-off send can go out at any time unless you set a window. Automations default to 9:00 to 21:00.

Messages over the limit wait for capacity and must still meet the other rules.

Paused or waiting for balance?

A Paused campaign needs you to resume it after fixing the reason.



Waiting

Top up and it resumes.



Paused

Fix the cause and resume.

10 %

Failed or cancelled

2 %

Opt-outs

20

Minimum sends

01 Failures or opt-outs

By default, it pauses if failed or cancelled messages reach 10%, or opt-outs reach 2%, of messages sent. Both rates use the last 24 hours and are checked from 20 sends onward.

02 Quality or approval

Yellow quality in Meta stops promotions. Red stops all sends. Sends also stop if the template loses approval.

03 Zero balance

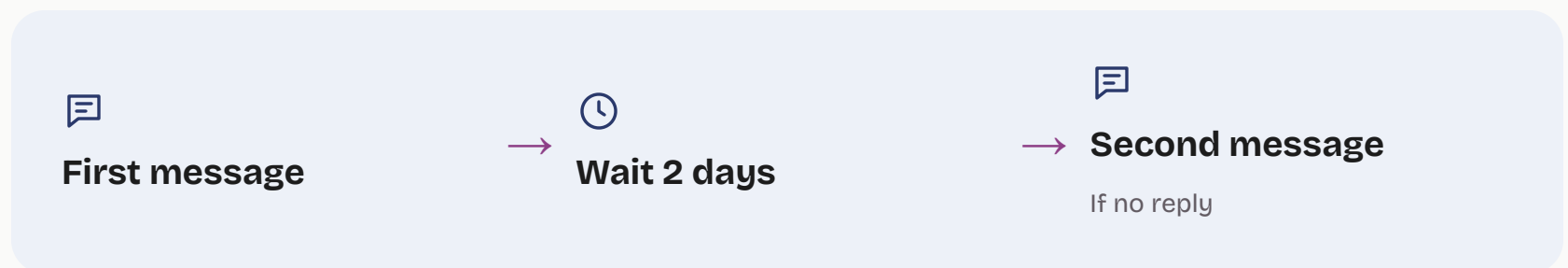
Sends wait and continue automatically once you top up. You do not need to resume the campaign for this reason.

Thresholds may vary with configuration. Check the reason before resuming.

08 / AUTOMATIONS

Send when the moment comes.

Campaigns → Create campaign → Ready-made automations. Choose the template and enable it.



01 Reactivate without purchase

One message, a 2-day wait and another if they have not replied.

02 Repurchases and orders

Reminders follow the product cycle. Confirmation follows a new order. Cart recovery requires connecting your ecommerce.

03 When a contact exits

A purchase always ends their sequence. A reply does too, unless you disable Stop on reply. They exit if they opt out or your team pauses their AI Seller.

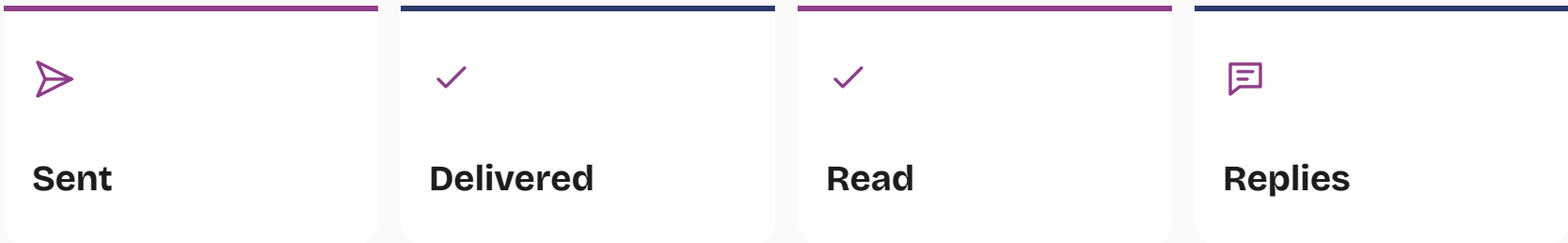
04 When it ends

Closing depends on the flow. If it ends with a silence wait, that wait defaults to 7 days.

They stay in your contacts. Shopify and in-store pickup PIN are marked Coming soon.

See what happened next.

Open the campaign to see sent, delivered, read, replies and attributed orders.



- 01

Check the metrics
Automations have their own metrics page: enrollments, deliveries, replies, opt-outs and attributed sales.
- 02

Understand attribution
It counts purchases within the configured window, for example 7 days. It does not prove the campaign caused each purchase.
- 03

Adjust before repeating
If opt-outs increase, review your message and audience. You can pause an automation and resume it from the list.

Something missing?

Use Send feedback in the CRM banner.