

LeadSquared WhatsApp Integration with Route Mobile

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 [WhatsApp Business Messaging Connector](#). For frequently asked questions, see [WhatsApp Business FAQs](#).

1. Reach out to us at support@leadsquared.com & alliances@routemobile.com 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.

The screenshot shows the LeadSquared Administrator Dashboard with the following components:

- Navigation:** DASHBOARD, CONTENT, MARKETING, LEADS, WORKFLOW, APPS, REPORTS.
- Administrator Dashboard:**
 - Key Lead Metrics (Last 30 Days):**

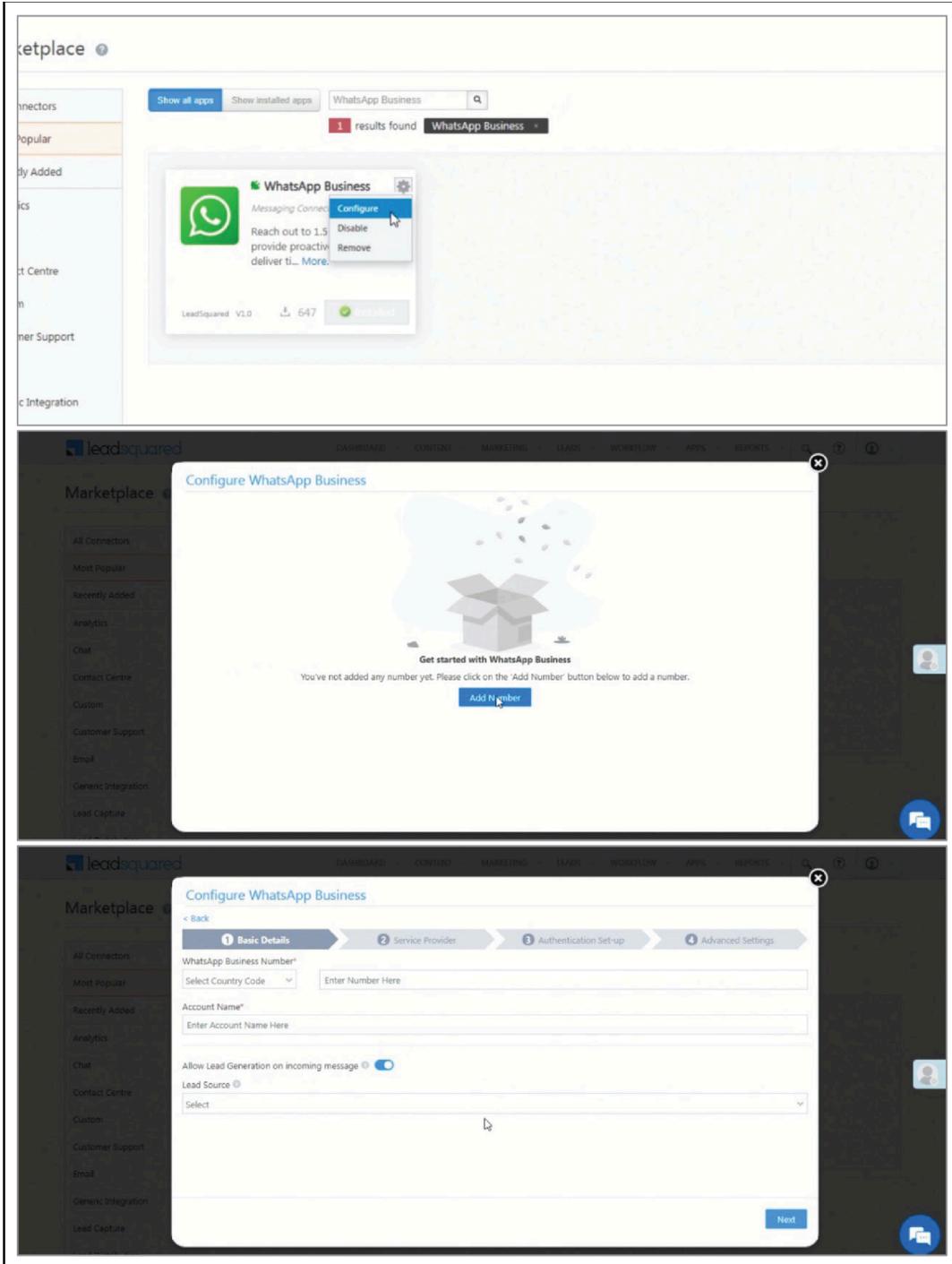
New Leads	Engagement	Active Leads
7	0%	100%
 - Overall Lead Funnel:**

Interest	24
Engaged	4
Customer	6
 - Recently Sent:**

Campaign Name	Click
Email Camp	100%
Mail - Goa	14.29%
 - Team Task Summary:**

User Name	Total Incomplete Task	Pending	Pending for today	Overdue	Recently Completed
Joseph Chacko	2	0	0	2	0
 - Top Landing Pages:**

Page Name	Submits	Conversion
Ladakh	0	0.00%
- App Marketplace:**
 - Search: WhatsApp Business
 - Results:
 - SMS Marketing App:** SMS Connector, 3548 downloads, installed.
 - LeadSquared Email Sy...:** Email Connector, 2539 downloads, INSTALL.
 - Super Receptionist:** Telephony Connector, New Super Connector, More.
 - Custom Dashlets Buil...:** Analytics Connector.
 - Custom Lead and List ...:** UI Customization Connector.
 - LeadSquared:** Telephony Connector.
- WhatsApp Business Detail View:**
 - Search: WhatsApp Business
 - Results: 1 results found
 - WhatsApp Business:** Messaging Connector, Reach out to 1.5 billion users to provide proactive support, deliver ti... More. 646 downloads, INSTALL.



4. Configuration

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

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)

Account Name*

Allow Lead Generation on incoming message

Lead Source

→ 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 <input checked="" type="checkbox"/> 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

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

Configure WhatsApp Business

< Back

1 Basic Details → 2 **Service Provider** → 3 Authentication → 4 Converse Settings → 5 Advanced Settings

Service Provider Selection

 Gupshup	 Infobip	 ValueFirst
 WhatsApp Client	 Zoko	 Route Mobile <input checked="" type="checkbox"/>
 Kaleyra		

Previous **Next**



4.3 Authentication Set-up

In this screen, enter the following details.

Configure WhatsApp Business

< Back

1 Basic Details
2 Service Provider
3 Authentication
4 Converse Settings
5 Advanced Settings

Client Base URL*

WhatsApp Number*

Username*

Password*

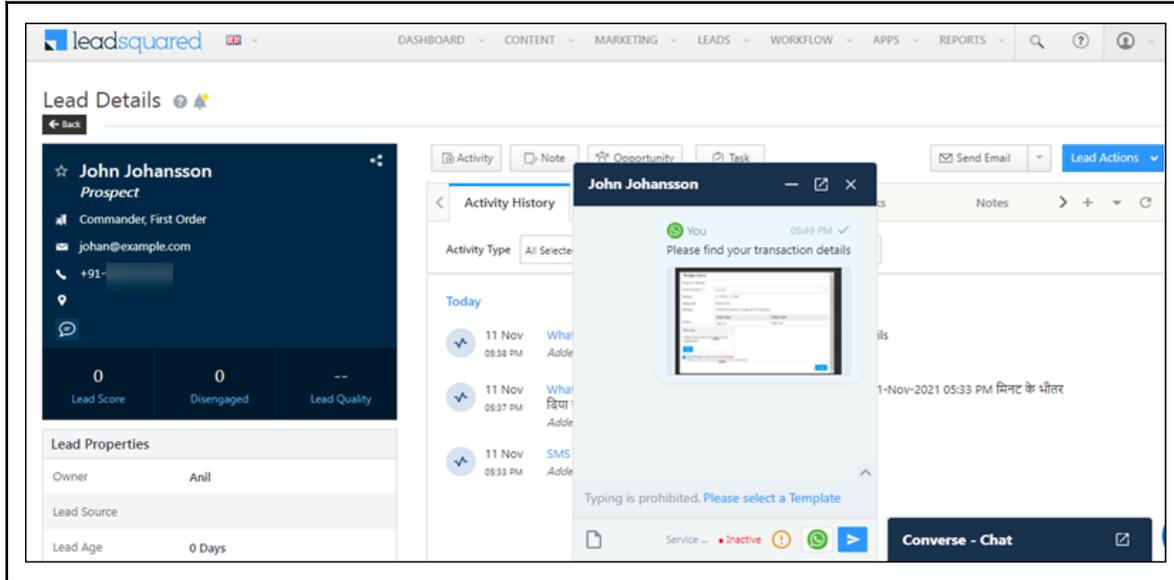


Field	Description
Base URL	Paste the base URL in this field. Use the following <code>https://whatsapp-api-clients.leadssquaredapps.com/transform/66605/routemobile</code>
WhatsApp Number	Paste your WhatsApp business number in this field, without including any special characters such as '+', etc. You will 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: <code>alliances@routemobile.com</code>
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.



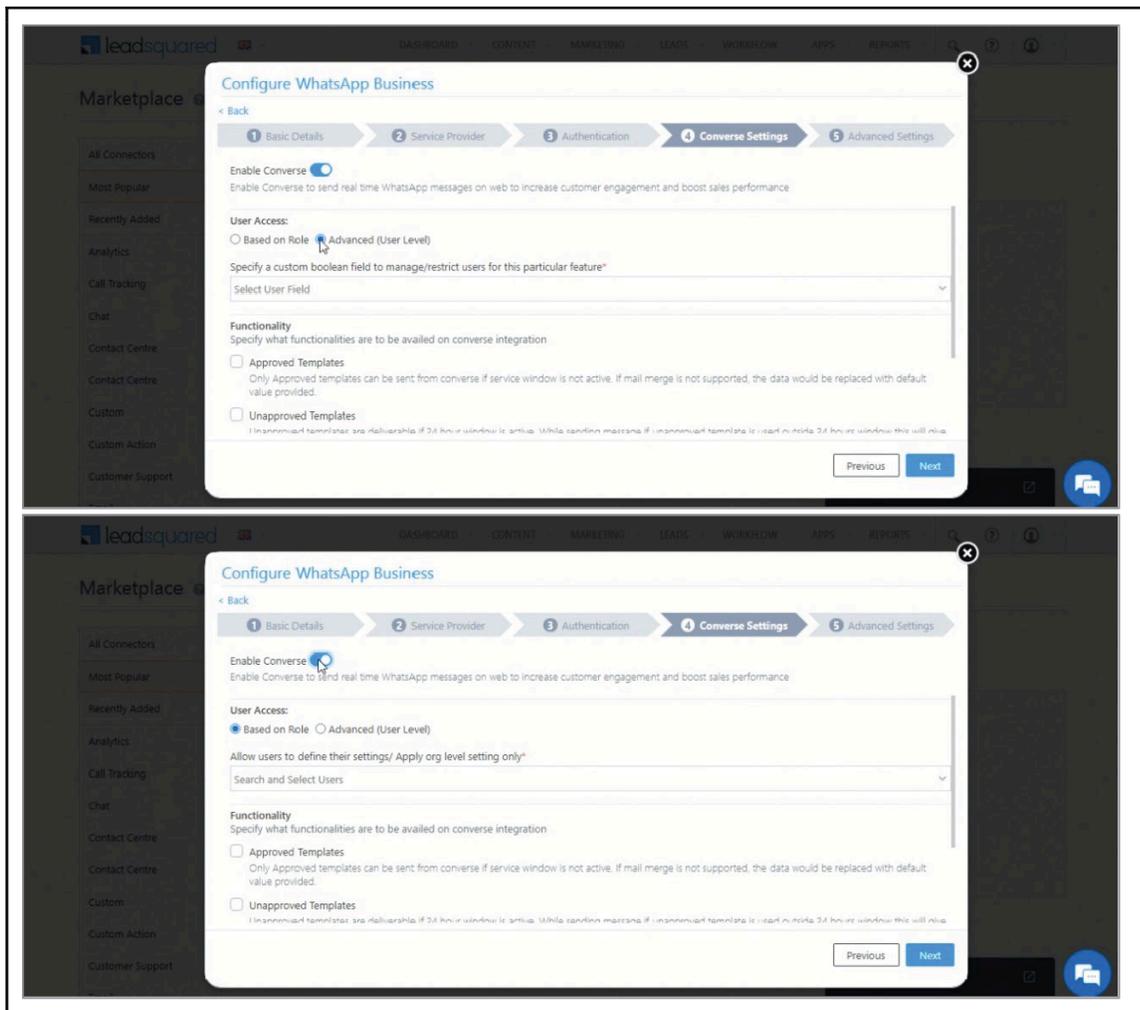
To integrate LeadSquared Converse with WhatsApp, complete the following steps –

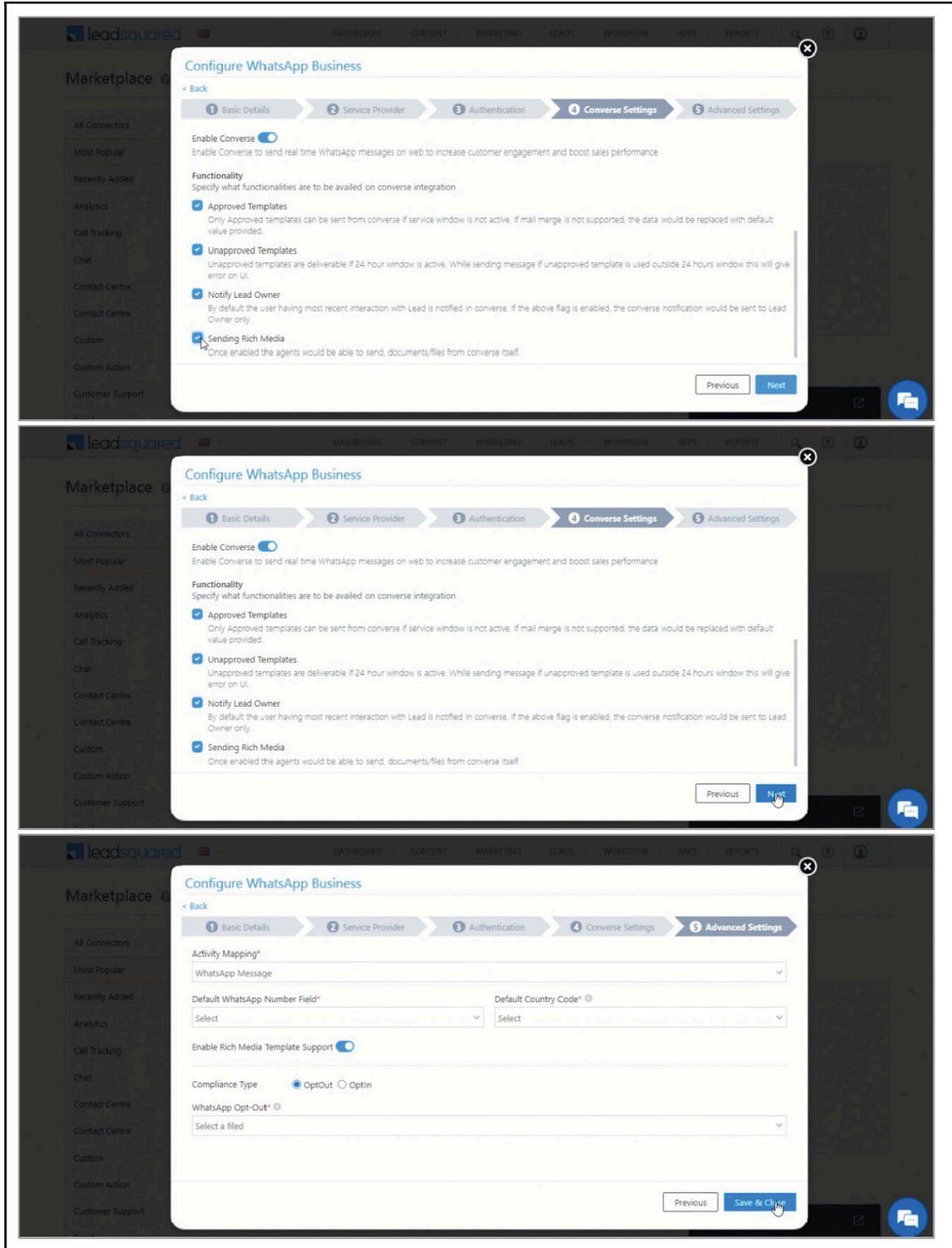
- i. On the Converse Settings tab, toggle the Enable Converse slider.
- ii. Under User Access, grant permissions to users who can communicate with leads through the LeadSquared Converse.
 - o Based on Role – From the Search and Select Users dropdown, select the LeadSquared user roles that can send messages through LeadSquared Converse.
 - o 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 –
 - o Approved Templates – Enable this functionality to allow your users to send approved WhatsApp templates to your leads.
 - o 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.

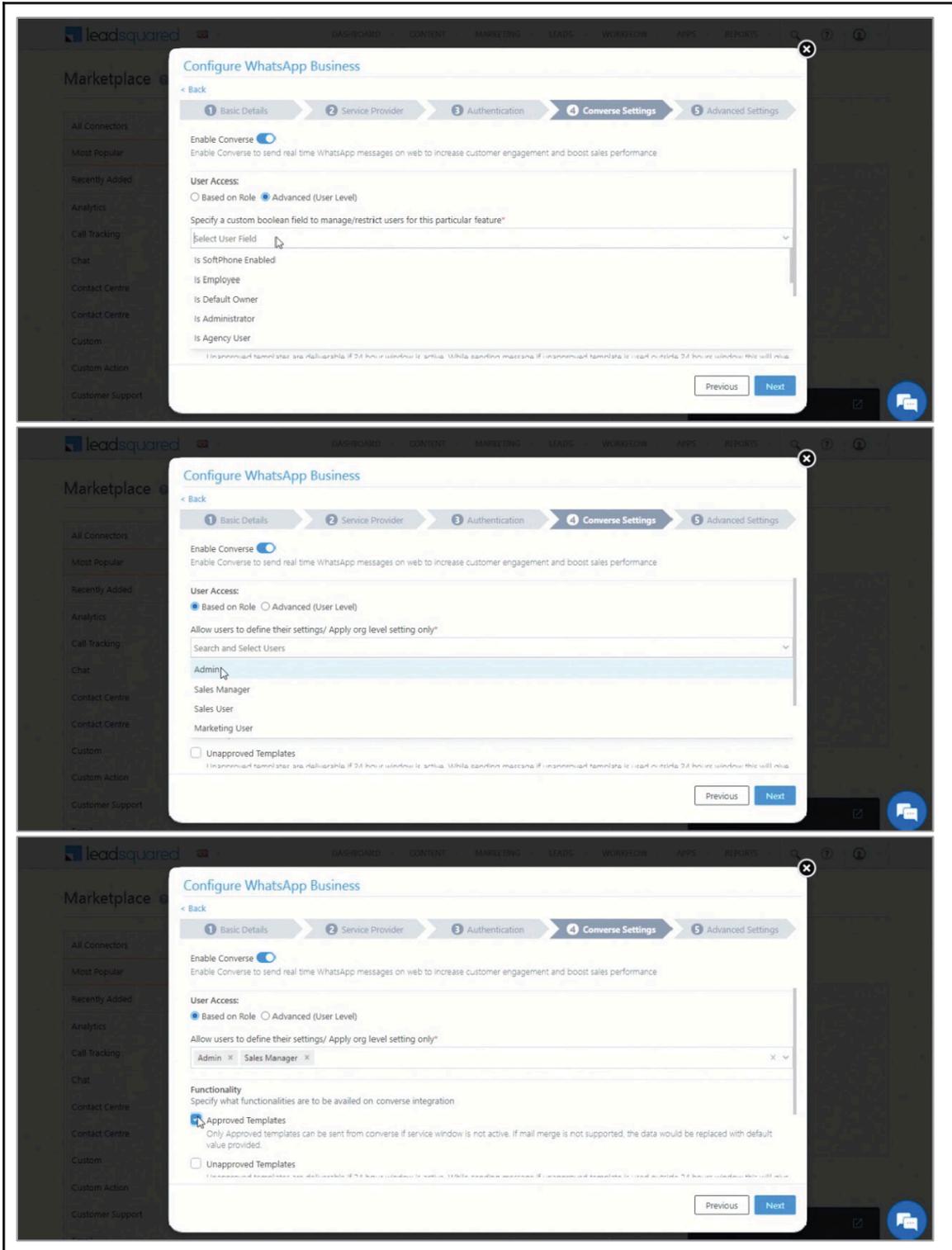
- Notify Lead Owner* – When enabled, only lead owners will get notifications of the WhatsApp messages a lead sends. When disabled, all logged-in users will receive notifications of these WhatsApp messages.
- Sending Rich Media – Enable this functionality to allow your users to send media files in the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

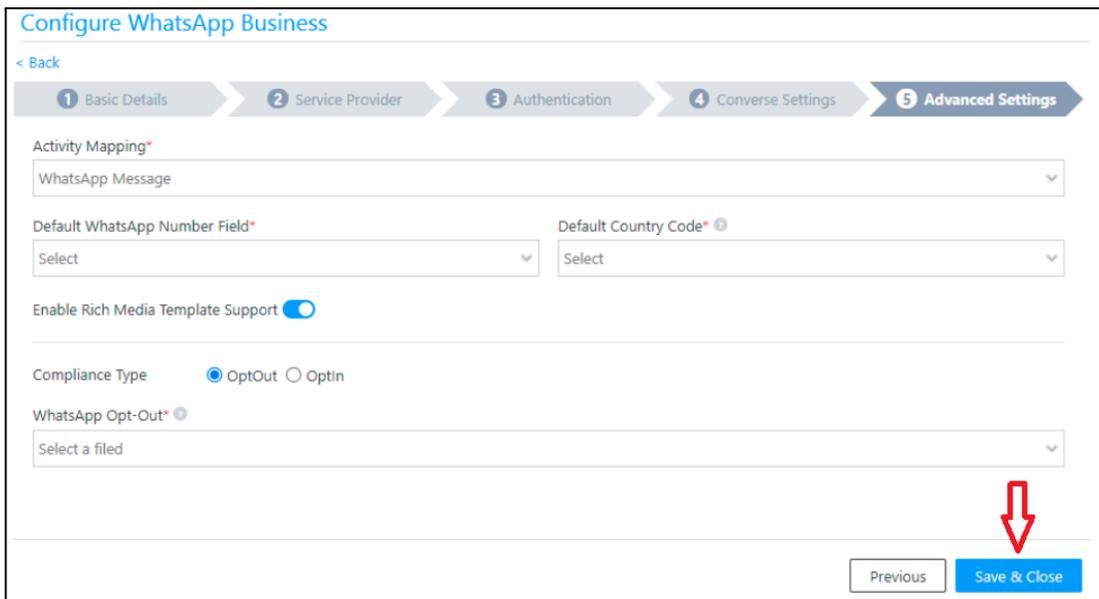






4.5 Advanced Settings

In this screen, enter the following details



- **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.

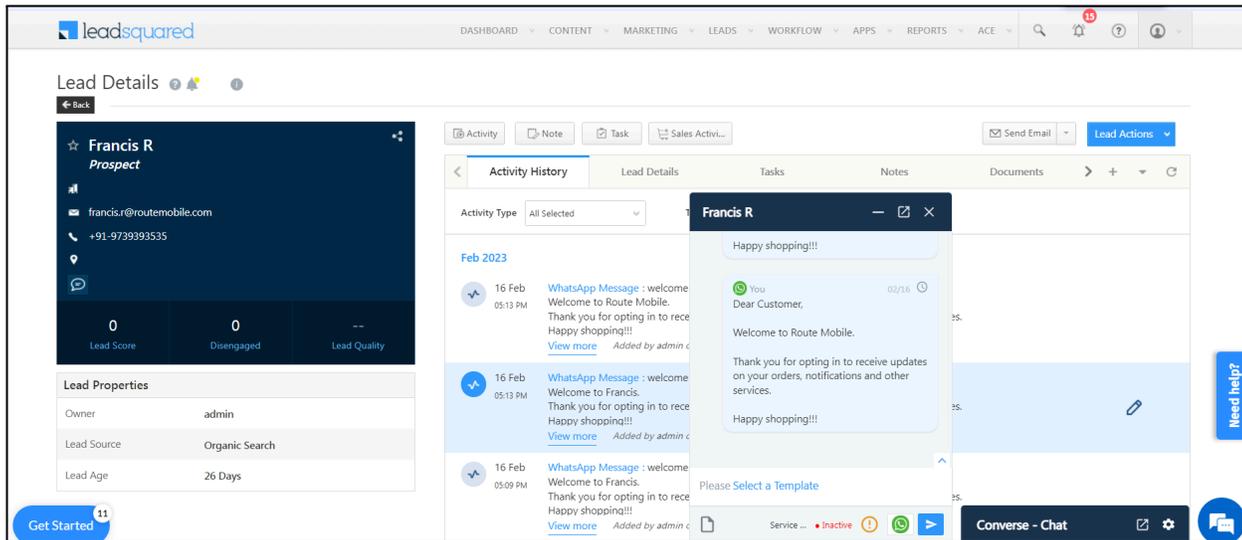
Note: You must create a custom lead field of boolean type to map to the WhatsApp opt-out functionality. For example, you may create a custom lead field called “WhatsApp Opt Out”. Leads for whom the field is selected/checked won’t receive WhatsApp messages.

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.

5. Conversing with Leads via WhatsApp

Integrating Converse with [LeadSquared's WhatsApp](#) 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 [LeadSquared Converse](#).



6. Next Steps

Once the connector is successfully installed, you can proceed to add WhatsApp templates and finally message your leads. For details, see [Adding WhatsApp Templates to LeadSquared](#).