



Nezler Connect

User guide

Everything your team needs to run WhatsApp for your business: inbox, contacts, templates, campaigns, chatbots and team routing, step by step with screenshots.



Online version, always up to date: wa.nezlertech.com/help

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GETTING STARTED

Create your account and log in

Sign up, verify your email and find your way around the dashboard.

Nezler Connect puts your WhatsApp Business number on a shared screen for your whole team. You can reply to customers, send offers to many people at once, and set up automatic replies, all from your computer or phone.

Create your account

1. Open **wa.nezler.tech.com** and click **Start free trial**.
2. Fill in your business name, your name, mobile number, work email and a password of at least 8 characters.
3. Choose a plan. You can try any plan free during the trial.
4. Tick **I agree to the Terms and Privacy Policy** and click **Create account**.

Nezler Connect

Start your 7-day free trial

- ✓ Official WhatsApp Business Platform
- ✓ Shared inbox for your whole team
- ✓ Campaigns, templates and auto-replies
- ✓ No credit card needed for the trial

Need help getting started? [Chat with us on WhatsApp](#)

Create your account

Business name
Sharma Sweets

Your name
Mobile number
98765 43210

Work email

Password (8+ characters)

Plan
Starter: ₹999/month after trial

☐ I agree to the [Terms](#) and [Privacy Policy](#)

Create account

Already have an account? [Log in](#)

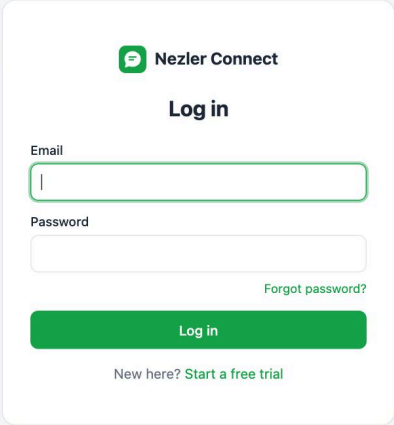
The sign-up page

5. We send you an email with a link. Click it to confirm your email address. Until you do, a reminder bar shows at the top of the screen, and you can click **Resend email** if it didn't arrive. Check your spam folder too.

Tip If your business was set up by the Nezler team, you don't need to sign up. You'll receive your login details from us instead.

Log in

Go to **wa.nezler.tech.com/login**, enter your email and password, and click **Log in**. Forgot your password? Click **Forgot password?** and we'll email you a reset link.

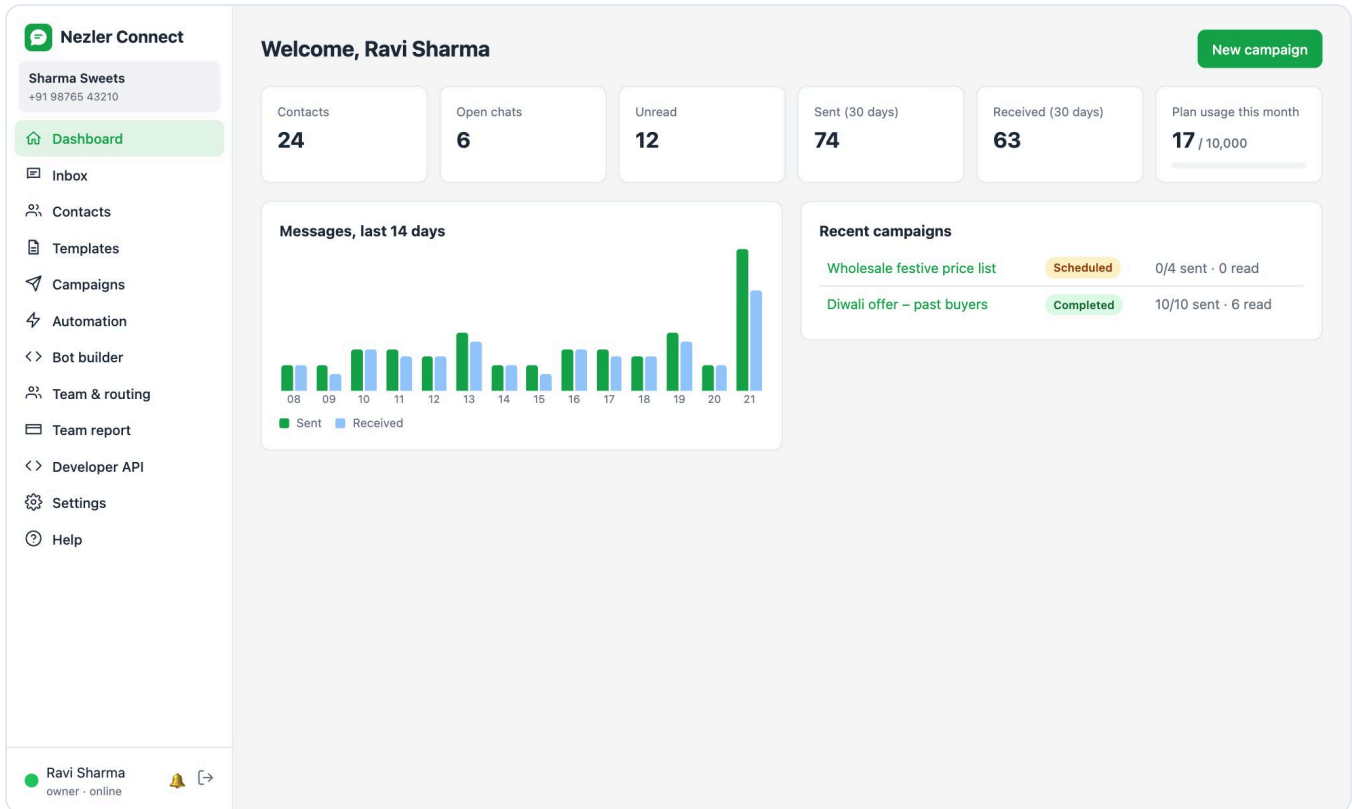


The login page

Your dashboard

After logging in you land on the dashboard. It shows how your WhatsApp is doing at a glance:

- **Contacts:** everyone saved in your account.
- **Open chats** and **Unread:** conversations waiting for a reply.
- **Sent** and **Received:** messages in the last 30 days.
- **Plan usage this month:** messages used out of your plan's monthly limit.
- **Messages, last 14 days:** a daily chart of sent (green) and received (blue) messages.
- **Recent campaigns:** your latest bulk messages and how many were read.



The dashboard

The menu on the left takes you everywhere else. On a phone, the menu moves to a bar at the bottom of the screen, and **More** opens the rest.

What to do first

1. [Connect your WhatsApp number](#) (skip this if the Nezler team did it for you).
2. [Add or import your contacts](#).
3. [Create your first template](#) and wait for Meta's approval.
4. [Invite your team](#).
5. [Turn on a welcome message](#) so no customer waits.

GETTING STARTED

Connect your WhatsApp number

Link your WhatsApp Business number so you can send and receive messages.

Before you can send or receive messages, your WhatsApp Business number must be connected to Nezler Connect. Most businesses have this done by the Nezler team during onboarding. If yours is already connected, you'll see a green dot and your number under **Settings → WhatsApp connection**.

The screenshot shows the 'Settings' page in the Nezler Connect application. On the left is a sidebar with navigation options: Dashboard, Inbox, Contacts, Templates, Campaigns, Automation, Bot builder, Team & routing, Team report, Developer API, Settings (highlighted), and Help. The main content area is titled 'Settings' and contains three sections: 'WhatsApp connection', 'Business', and 'Team'. The 'WhatsApp connection' section shows a green status indicator, the business name 'Sharma Sweets', and its phone number '+91 98765 43210'. It also displays the WABA ID and Phone number ID. Below this are input fields for the WhatsApp Business Account ID, Phone number ID, and Permanent access token, with a 'Save & verify' button. The 'Business' section has input fields for the Business name (Sharma Sweets) and Timezone (Asia/Kolkata), with a 'Save' button. The 'Team' section includes a 'Manage team' button. A 'Plan' section on the right shows the current plan as 'Growth' with 17/10,000 messages used this month, valid until 14 Nov 2026. At the bottom left, a user profile for Ravi Sharma is shown as online.

Settings, with the WhatsApp connection at the top

What you need

- A phone number that is **not** active on the normal WhatsApp or WhatsApp Business app. (Meta can sometimes move an existing WhatsApp Business app number. Ask us to check yours.)
- A Facebook account with access to your business's **Meta Business Suite**.
- Your business name exactly as you want customers to see it. Meta reviews the display name.

Option 1: let the Nezler team do it (recommended)

Send us the phone number and your business details. We'll register the number with Meta, connect it and test it. You'll receive a 6-digit code on that number by SMS or call during the process; share it only with your Nezler account manager.

Option 2: connect it yourself

1. In Meta's **WhatsApp Manager**, add your number and verify it with the code Meta sends.

2. Copy three things from Meta:

- **WhatsApp Business Account ID**
- **Phone number ID**
- a **permanent access token** from a System User in Meta Business Settings

3. In Nezler Connect, open **Settings**. Paste them into the **WhatsApp connection** box and click **Save & verify**.

4. When the details are right, the box turns green and shows your number and business name.

Click **Test connection** at any time to check that everything still works.

Important Keep your access token private. Paste it only into the Settings page, never into a chat or email. Once saved, it's stored encrypted and is never shown again.

After connecting

Your approved templates are copied in from Meta automatically. Customers can now message your number, and their chats appear in the **Inbox**.

WhatsApp rules in plain English

The 24-hour window, templates, Meta charges and opt-outs.

WhatsApp has a few rules that every business account must follow. Nezler Connect follows them for you, but knowing them avoids surprises.

The 24-hour reply window

When a customer messages you, you can reply freely, with any text, photo or file, for **24 hours** from their last message. Each new message from them restarts the 24 hours.

After 24 hours of silence from the customer, you can only send an approved **template**. The Inbox tells you when the window has closed and offers the template button instead.

Templates

A template is a message you write once and Meta approves. Templates are needed:

- to message someone first (for example, a new lead or a campaign)
- to message someone who hasn't written in the last 24 hours

Meta usually approves templates within minutes. See [Create message templates](#).

Meta's charges

Meta charges a small fee for each template message it delivers, billed directly to your WhatsApp account. There is no markup from us. The fee depends on the template's category:

- **Marketing:** offers, festive wishes, re-engagement (highest rate)
- **Utility:** order updates, bookings, reminders
- **Authentication:** one-time passwords

Replies inside the 24-hour window are free. Your plan with Nezler Connect is separate, and covers the platform itself.

Tip The campaign screen shows an estimated Meta charge before you send, so you always know the cost.

Opt-outs

If a customer replies **STOP**, they're marked as opted out and never receive a campaign again. If they reply **START**, they're opted back in. This happens automatically.

Keep your number healthy

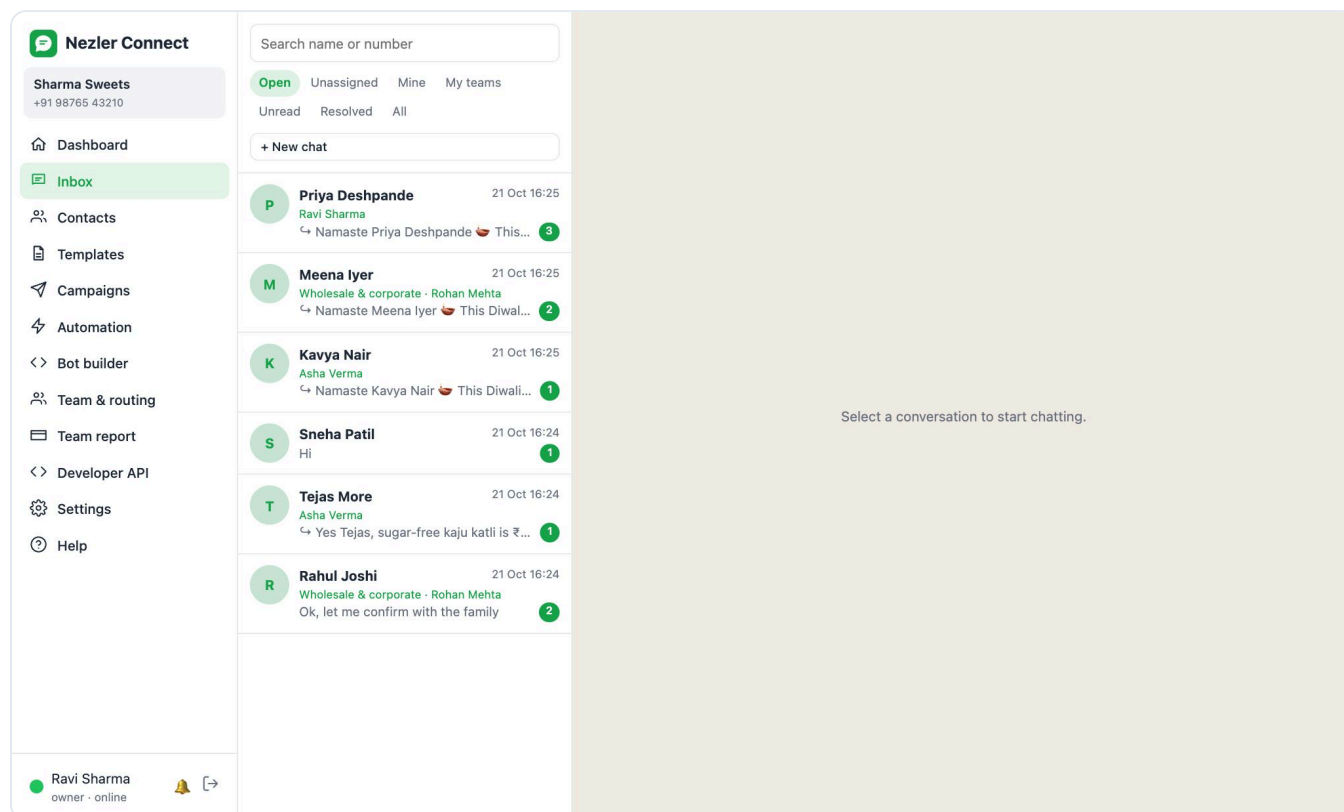
Meta watches how customers react to your messages. If many people block or report you, Meta may limit your number. To stay safe:

- message only people who gave you their number and expect to hear from you
- keep campaigns relevant and not too frequent
- always offer a way to opt out, for example "Reply STOP to unsubscribe"

Reply to customers

Read chats, reply, send files, quick replies and templates.

The Inbox is where your team talks to customers. Every WhatsApp chat on your number appears here, newest first.



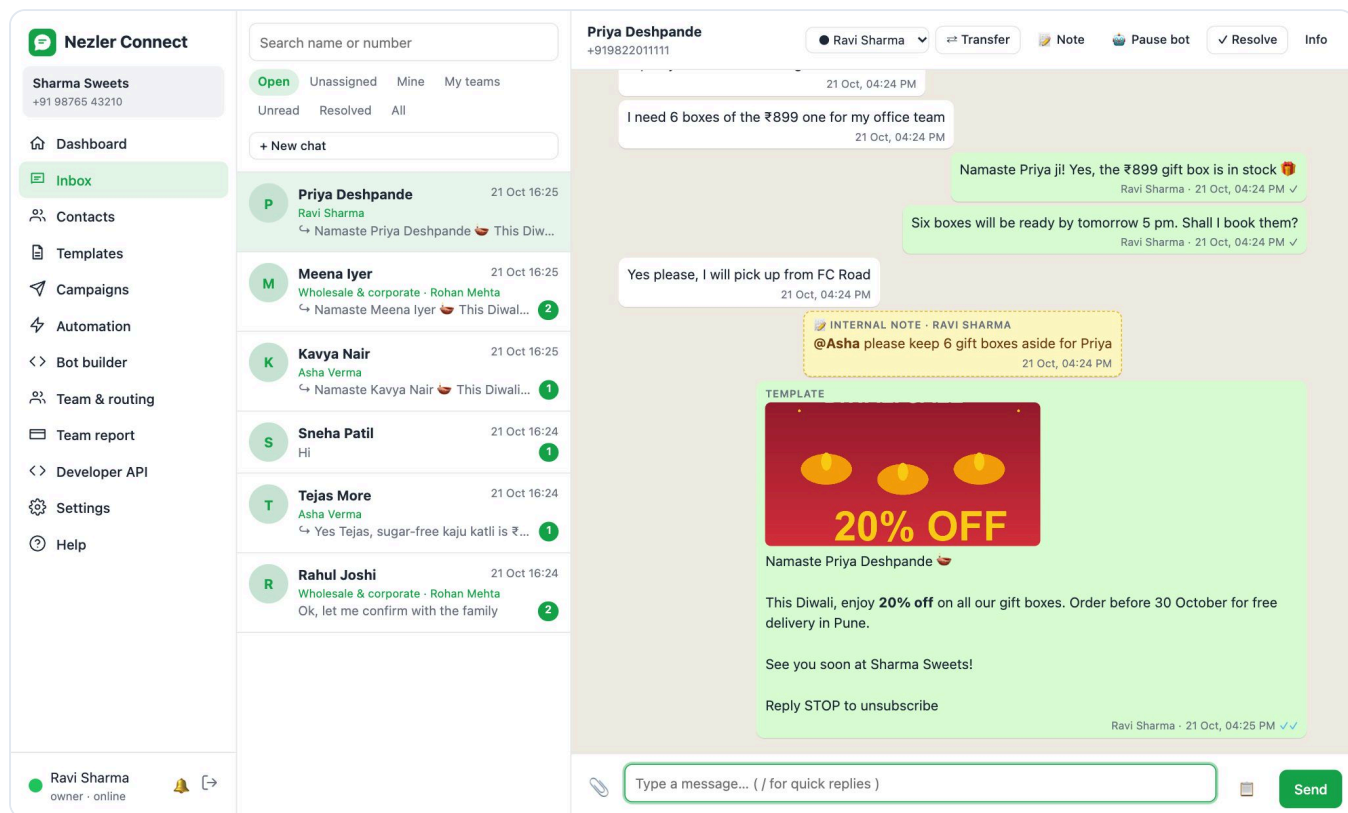
The Inbox

Find a chat

- Use the tabs at the top:
 - **Open:** chats waiting to be handled
 - **Unassigned:** chats nobody owns yet
 - **Mine:** chats assigned to you
 - **My teams:** chats in your teams' queues
 - **Unread:** chats you haven't opened
 - **Resolved:** closed chats
 - **All:** everything
- Search by name or number in the box above the tabs.
- A green number on a chat shows unread messages. The coloured line under the name shows who it's assigned to.

Reply

1. Click a chat to open it.
2. Type in the box at the bottom and press **Send** (or Enter). Use Shift + Enter for a new line.
3. To send a photo, video or document, click the paperclip. Files can be up to 16 MB.



An open chat

You can format text the WhatsApp way: **bold** , *_italic_* , ~~~strikethrough~~~ .

Ticks show what happened to your message: one grey tick means sent, two grey ticks delivered, and two blue ticks read. A red ! means it failed, with the reason underneath.

Quick replies

Type **/** in the message box to see your saved answers, then click one to insert it. Your manager can add quick replies under **Automation**.

Nezler Connect

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Search name or number

Open Unassigned Mine My teams
Unread Resolved All
+ New chat

Priya Deshpande
Ravi Sharma
Namaste Priya Deshpande 🙏 This Diw...

Meena Iyer
Wholesale & corporate - Rohan Mehta
Namaste Meena Iyer 🙏 This Diwali, enj...

Kavya Nair
Asha Verma
Namaste Kavya Nair 🙏 This Diwali, enj...

Sneha Patil
Hi

Tejas More
Asha Verma
Yes Tejas, sugar-free kaju katli is ₹1,30...

Rahul Joshi
Wholesale & corporate - Rohan Mehta
Ok, let me confirm with the family

Tejas More
+919824022222
Asha Verma Transfer Note Pause bot Resolve Info

Thank you!
15 Oct, 09:41 PM

Thank you!
17 Oct, 08:23 PM

Is sugar-free kaju katli available?
21 Oct, 04:24 PM

Your order is ready 🙏
08 Oct, 09:02 PM ✓✓

Your order is ready 🙏
16 Oct, 09:02 PM ✓✓

Yes Tejas, sugar-free kaju katli is ₹1,300/kg. Available every day.
Ravi Sharma - 21 Oct, 04:24 PM ✓

/address Sharma Sweets, 14 FC Road, Shivajinagar, Pune 411005. Googl...

/thanks Thank you for shopping with Sharma Sweets! 🙏

/upi You can pay by UPI to sharmasweets@okicici. Please share a ...

/

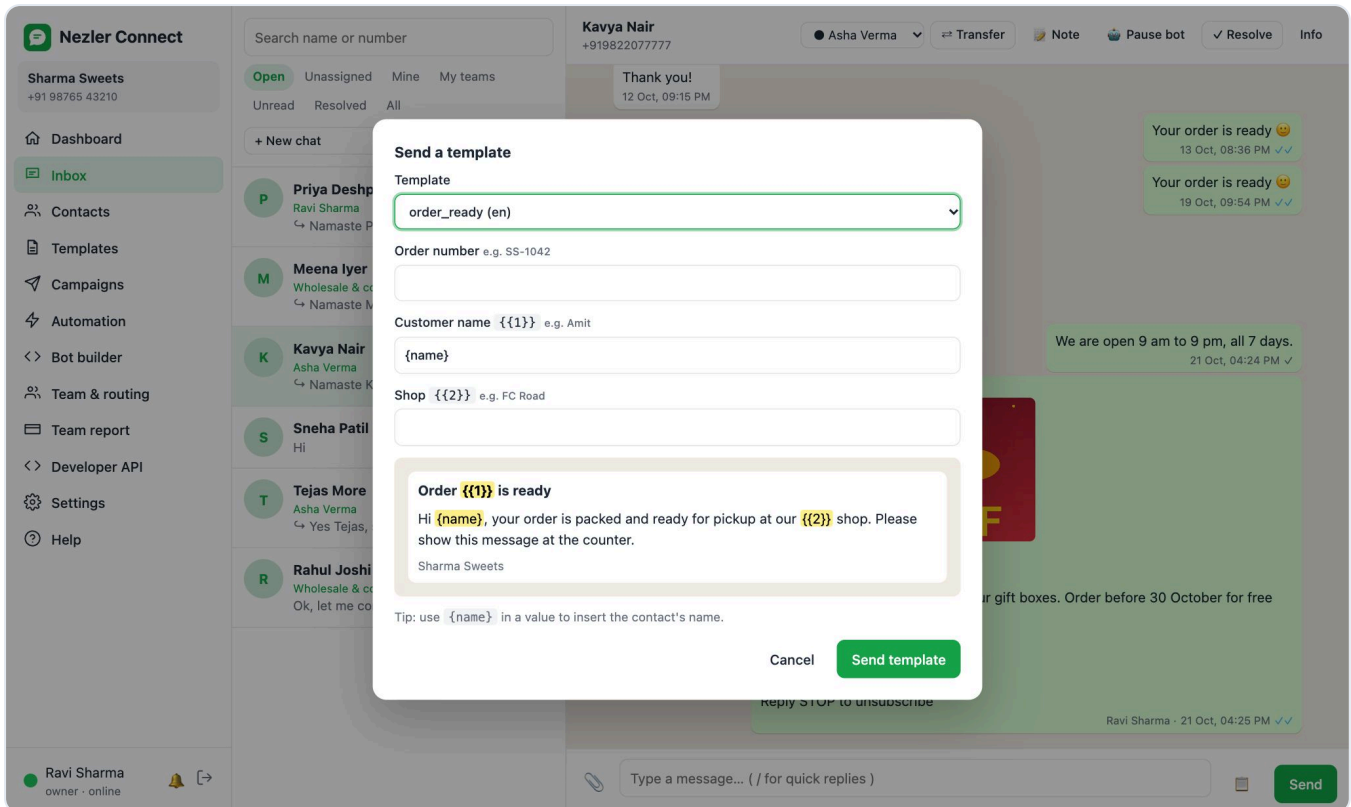
Ravi Sharma
owner · online

Quick replies appear when you type /

Send a template

If the customer hasn't written for 24 hours, a normal message can't be sent. Click the template button instead:

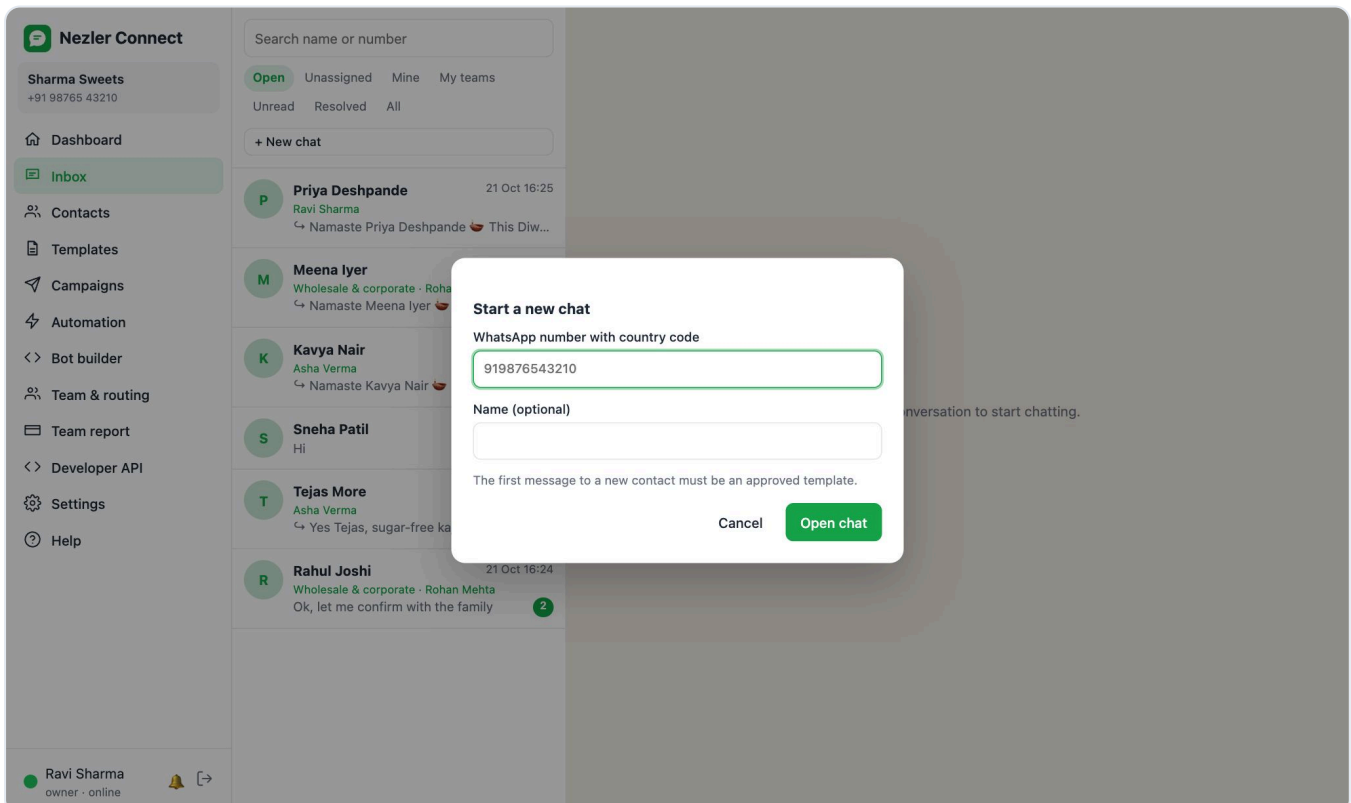
1. Choose the template.
2. Fill in its blanks. Type `{name}` to use the customer's name automatically.
3. Check the preview and click **Send template**.



Sending a template from a chat

Start a new chat

Click **+ New chat**, enter the number with country code (for example 919876543210) and an optional name, and click **Open chat**. The first message to a new number must be a template.



Starting a new chat

Close a chat

Click **Resolve** when the conversation is done. It moves to the **Resolved** tab, and reopens automatically if the customer writes again.

Assign, transfer and add notes

Share chats with your team without the customer noticing.

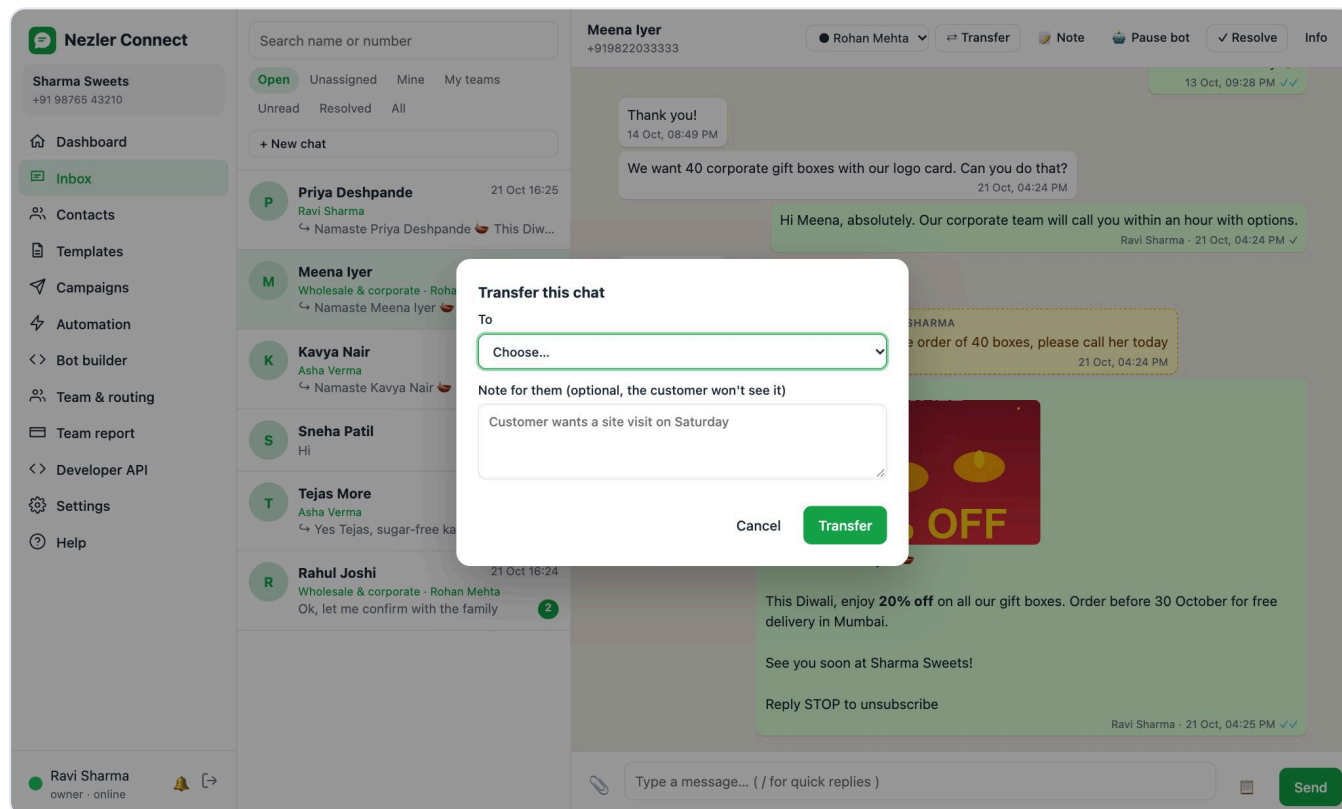
When several people share one WhatsApp number, these tools keep everyone in sync. The customer never sees any of them.

Assign a chat

At the top of an open chat, use the drop-down to choose who owns it. The chat then appears under that person's **Mine** tab, and they get a notification.

Transfer to a person or team

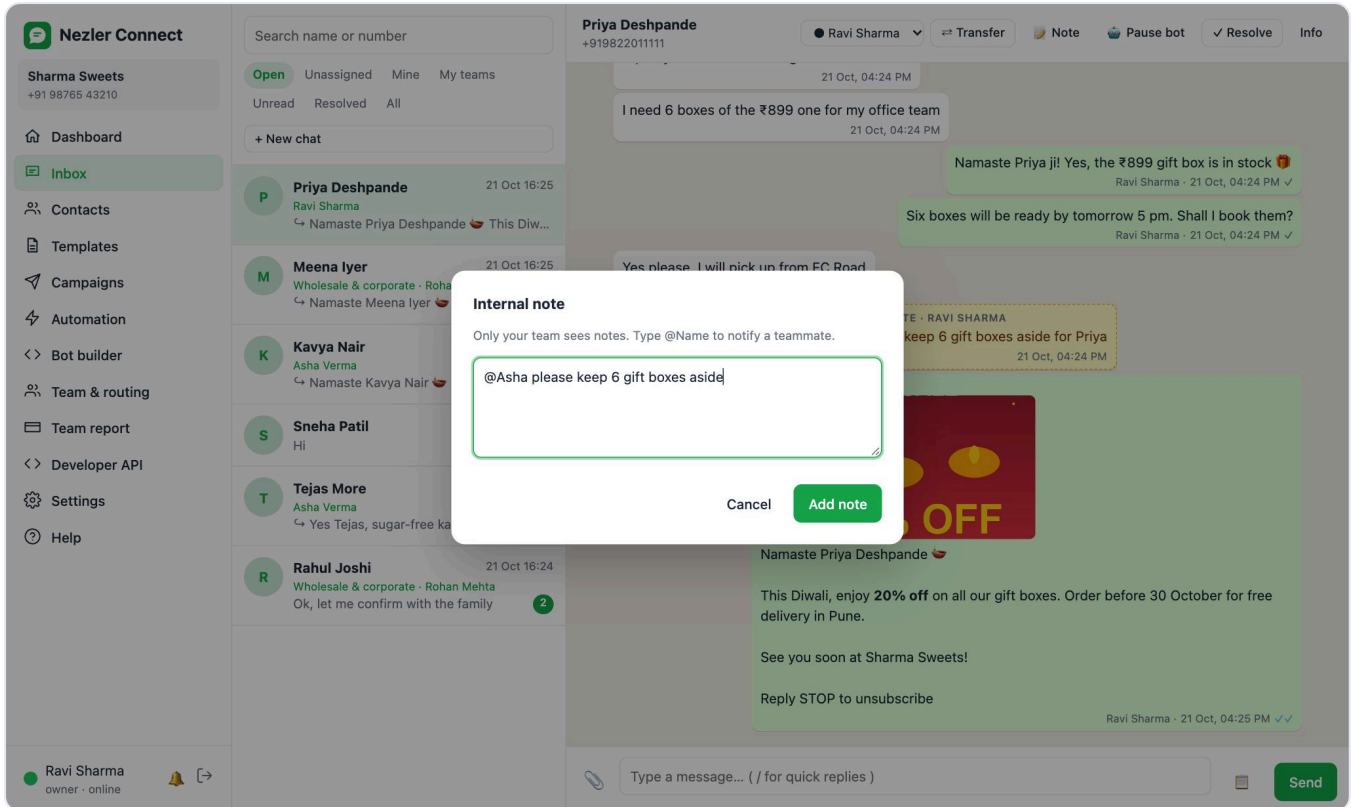
1. Click **Transfer**.
2. Choose a teammate or a whole team.
3. Optionally add a note, for example "Wants a quote for 40 gift boxes, please call today".
4. Click **Transfer**.



Transferring a chat

Internal notes

Click **Note** to leave a message for your team inside the chat. Notes show in yellow and are never sent to the customer. Type **@** and a name, like **@Asha**, to notify that teammate.



Adding an internal note

Contact details and history

Click **Info** to open the side panel. Here you can:

- see the contact's team, lists, city and other columns
- edit tags and notes
- see the chat's history: who it was routed to, transfers and reopenings



If a chatbot is talking to this customer and you want to take over, click **Pause bot**. The bot also stops automatically as soon as someone from your team replies. Click **Resume bot** to hand back.

Tip Managers and owners see all chats. Agents see their own chats and the queues of their teams. See [Add team members and roles](#).

CONTACTS

Add and edit contacts

Save customers with their own details such as city or birthday.

Contacts are the people you talk to on WhatsApp. Anyone who messages you is saved automatically.

You can also add people yourself, or [import them from Excel](#).

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Contacts

↓ Template Columns Export Import **+ Add contact**

Total contacts **24** On WhatsApp **23** Not on WhatsApp **1** Opted out **1** Lists **4** Added this month **9**

All contacts 24

LISTS
Corporate gifting 4
Diwali 2025 buyers 10
Pune customers 15
Wholesale buyers 5

New list name **+ Create**

Search name, phone, email Any tag Any status + Condition **Apply**

	NAME	PHONE	WHATSAPP	TAGS	LISTS	CITY	CUSTOM TYPE
☐	Gaurav Chavan	+919824066666	On WhatsApp	new	Pune customers	Pune	Retail
☐	Swati Deshmukh	+919824055555	On WhatsApp		Diwali 2025 buyers Pune customers	Pune	Retail
☐	Nikhil Bhosale	+919824044444	Not On WhatsApp		Wholesale buyers	Kolhapur	Wholesale
☐	Aditi Kulkarni	+919824033333	On WhatsApp	vip	Diwali 2025 buyers Pune customers	Pune	Retail
☐	Tejas More	+919824022222	On WhatsApp		Pune customers	Pune	Retail
☐	Ritu Arora	+919824011111	On WhatsApp		Diwali 2025 buyers	Pune	Retail

Ravi Sharma owner · online

The Contacts page

The tiles at the top show:

- your total contacts
- how many are on WhatsApp, and how many are not
- how many have opted out
- how many lists you have
- how many contacts were added this month

Add a contact

1. Click **+ Add contact**.
2. Enter the phone number **with country code**, for example 919876543210, and the name.
3. Add an email, tags (separated by commas) and notes if you like.
4. To fill in an extra detail such as City, open **+ Add field...** and pick one of your columns, or choose **+ Create a new column** to make a new one on the spot.
5. Tick the lists the contact should be in, then click **Save**.

Adding a contact with an extra City field

To edit someone, click their row. To delete them, open them and click **Delete**. Their chat history is deleted too.

Tip Tick **Opted out** if someone asks not to receive offers. They'll never be included in a campaign, but you can still reply when they message you.

Your own columns

Every contact has Phone, Name, Email, Tags and Notes. Add your own columns, such as City, Product, Project, Birthday or Customer type, to store more about each person. You can then:

- filter contacts by them
- route chats by them, for example sending wholesale customers to the wholesale team
- use them inside campaign messages, for example "free delivery in {City}"

Click **Columns** on the Contacts page to add, rename or delete columns. A column can hold text, a number or a date. The page also shows how many contacts have each one filled in.

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Contact columns

← Contacts

Every contact has **Phone, Name, Email, Tags and Notes**. Add your own columns, like **City, Product, Project or Birthday**, to store more details. You can then filter by them, route chats by them and use them inside campaign messages.

COLUMN	TYPE	FILLED FOR		
<input type="text" value="City"/> <small>key: city</small>	Tex ▾	24 contacts	Save	Delete
<input type="text" value="Customer type"/> <small>key: customer_type</small>	Tex ▾	24 contacts	Save	Delete
<input type="text" value="Birthday"/> <small>key: birthday</small>	Dat ▾	5 contacts	Save	Delete

Add a column

Name

Type

Text ▾

Add column

Tip: columns are also created automatically when you import a file with extra columns.

Managing your columns

WhatsApp status

The **WhatsApp** column shows **On WhatsApp** once a message has been delivered to that number, and **Not on WhatsApp** if Meta reported that the number doesn't use WhatsApp. Campaigns skip numbers that aren't on WhatsApp, so you don't pay for messages that can't arrive.

CONTACTS

Lists, filters and bulk actions

Group contacts, find exactly who you need and act on many at once.

Lists

Lists group contacts, for example "Diwali 2025 buyers", "Wholesale buyers" or "Project Skyline leads". One contact can be in many lists.

- **Create a list:** type a name in the box under your lists, on the left of the Contacts page, and click **+ Create**.
- **Open a list:** click it to see only its contacts. From there you can **Import into this list**, **Rename** it or **Delete list**. Deleting a list keeps the contacts.
- **Add people to a list:** tick them and use **Add to list...** (see bulk actions below), tick the list when you add or edit a contact, or choose it during an import.

The screenshot shows the Nezler Connect interface. On the left is a sidebar with navigation links: Dashboard, Inbox, Contacts (highlighted), Templates, Campaigns, Automation, Bot builder, Team & routing, Team report, Developer API, Settings, and Help. The main area is titled 'Contacts' and displays summary statistics: Total contacts (24), On WhatsApp (23), Not on WhatsApp (1), Opted out (1), Lists (4), and Added this month (9). Below these is a section for 'Pune customers' with 15 matching contacts. A search bar and filters for 'Any tag' and 'Any status' are present. A table lists the contacts with columns for Name, Phone, WhatsApp status, Tags, Lists, City, and Customer Type. The table shows five contacts: Gaurav Chavan, Swati Deshmukh, Aditi Kulkarni, Tejas More, and Ritu Aarwal. Each contact has a checkbox, a WhatsApp status indicator, and a list of associated lists (e.g., 'Pune customers', 'Diwali 2025 buyers').

	NAME	PHONE	WHATSAPP	TAGS	LISTS	CITY	CUSTOMER TYPE
☐	Gaurav Chavan	+919824066666	On WhatsApp	new	Pune customers	Pune	Retail
☐	Swati Deshmukh	+919824055555	On WhatsApp		Diwali 2025 buyers Pune customers	Pune	Retail
☐	Aditi Kulkarni	+919824033333	On WhatsApp	vip	Diwali 2025 buyers Pune customers	Pune	Retail
☐	Tejas More	+919824022222	On WhatsApp		Pune customers	Pune	Retail
☐	Ritu Aarwal	+919824011111	On WhatsApp		Diwali 2025 buyers	Pune	Retail

A list open on the Contacts page

Search and filter

- Type a name, number or email in the search box.
- Use the drop-downs to filter by tag, or by status (opted out, on or not on WhatsApp).
- Click **+ Condition** to filter by any column, for example **City is Pune** or **Birthday is empty**. Add as many conditions as you need, then click **Apply**.

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Contacts

Template

Columns

Export view

Import

+ Add contact

Total contacts

24

On WhatsApp

23

Not on WhatsApp

1

Opted out

1

Lists

4

Added this month

9

All contacts

24

LISTS

Corporate gifting

4

Diwali 2025 buyers

10

Pune customers

15

Wholesale buyers

5

New list name

+ Create

Search name, phone, email

Any tag

Any status

+ Condition

Apply

Clear

City

is

Pune

×

	NAME	PHONE	WHATSAPP	TAGS	LISTS	CITY	CUSTOMER TYPE
☐	Gaurav Chavan	+919824066666	On WhatsApp	new	Pune customers	Pune	Retail
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☐	Aditi Kulkarni	+919824033333	On WhatsApp	vip	Diwali 2025 buyers Pune customers	Pune	Retail
☐	Tejas More	+919824022222	On WhatsApp		Pune customers	Pune	Retail
☐	Ritu Agarwal	+919824011111	On WhatsApp		Diwali 2025 buyers Pune	Pune	Retail

Filtering contacts by City

Bulk actions

Tick the boxes next to contacts, or tick the box in the header to select everyone on the page. When there are more matches than one page, a link offers to select **all matching contacts**. A bar then appears with these actions:

- **Add to list**, or **Remove from this list** when a list is open
- **+ Tag** or **– Tag** to add or remove a tag
- **Send campaign** to start a campaign with exactly these people
- **Export** the selected contacts to a file
- **Opt out**
- **Delete**

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+ Add contact

Total contacts
24

On WhatsApp
23

Not on WhatsApp
1

Opted out
1

Lists
4

Added this month
9

All contacts 24

LISTS

Corporate gifting 4

Diwali 2025 buyers 10

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Wholesale buyers 5

New list name

+ Create

Search name, phone, email

Any tag

Any status

+ Condition

Apply

3 selected

Add to list...

tag

+ Tag

- Tag

Send campaign

Export

Opt out

Delete

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☐	Tejas More	+919824022222	On WhatsApp		Pune	Pune	Retail

Three contacts selected, with the bulk actions bar

Tip To send an offer to a very specific group, for example wholesale customers in Pune, filter first, select all matching, then click **Send campaign**.

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CONTACTS

Import from Excel and export

Bring in thousands of contacts at once, and download them any time.

Import contacts from Excel or CSV

1. On the Contacts page, click **Import**.
2. Not sure about the format? Click **Download template**. It has the right column names and a sample row. Fill it in with Excel or Google Sheets.
3. Click the upload box, choose your file (.xlsx or .csv, up to 50,000 contacts) and click **Next: match columns**.

Step 1: upload your file

4. **Match the columns.** For every column in your file, choose where it should go:
 - an existing field, such as Phone, Name or City
 - **+ Create new column** to keep extra details. Give it a name and a type.
 - **— Don't import —** to skip itPhone is required. Numbers without a country code get your default country code (+91) added.
5. **Choose lists and tags.** Tick the lists everyone in the file should join, and add tags if you like, for example "expo-2026".
6. Tick **overwrite** if contacts that already exist should be updated with the values in the file. Otherwise only empty details are filled in.
7. Click **Import**. A summary shows how many were added, updated and skipped, and why.

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Import contacts

1. Upload file

2. Match columns & choose lists

3. Done

Match the columns in *help-import.csv* · 2 rows

For every column, choose where it should go. Columns we don't recognise can become new contact columns, which you can then filter by and use in campaigns.

COLUMN IN YOUR FILE	EXAMPLE VALUES	SAVE AS
Phone	919811000001 · 919811000002	Phone (required)
Name	Sunita Rane · Harsh Vora	Name
Email	sunita@gmail.com	Email
City	Pune · Mumbai	City
Anniversary	2026-12-01	+ Create new column...
		Anniversary
		Text

Add these contacts to lists

Optional. Everyone in the file goes into the lists you tick. All contacts always includes them.

☐ Corporate gifting (4)
 ☐ Diwali 2025 buyers (10)
 ☐ Pune customers (15)
 ☐ Wholesale buyers (5)

Tags & options

Add tags to everyone (comma separated, new or existing)

imported, expo-2026

☐ For contacts that already exist, overwrite their details with the values in this file

Import 2 contacts

Step 2: match columns and choose lists

Tip Existing contacts are matched by phone number, so importing the same file twice never creates duplicates.

Export contacts

- **Everyone:** click **Export** on the Contacts page.
- **One list:** open the list, then click **Export view**.
- **A filtered group:** filter first, then click **Export view**.
- **Hand-picked people:** tick them and choose **Export** in the bulk actions bar.

The file opens in Excel and includes all your columns, lists and tags.

Important Agents may not be allowed to export contacts. The owner decides this on the [Team page](#).

Create message templates

Write templates with images, variables and buttons, and get them approved.

A template is a message that Meta approves in advance. You need one to message a customer first, to send a campaign, or to reply after the **24-hour window** has closed.

Your templates

Each template shows its status:

- **Approved:** ready to use
- **Pending:** Meta is reviewing it, usually for a few minutes
- **Rejected:** Meta refused it. The reason is shown. Click **Duplicate**, fix the wording and submit again.

Click **Sync from Meta** to load templates you created elsewhere, or to refresh their status.

Create a template

1. Click **+ New template**.
2. **Name:** lowercase letters, numbers and underscores only, for example `diwali_offer_2026`. Customers never see it.
3. **Language:** the language the message is written in.
4. **Category:**
 - **Marketing:** offers, launches, festive wishes, re-engagement
 - **Utility:** order, booking, payment and account updates

- **Authentication:** one-time passwords (OTP). Meta writes the text for you; you only choose the expiry and button.

A new template, with the live preview on the right

5. **Header** (optional): **None**, **Text**, **Image**, **Video** or **Document**. For media, upload the file right here:

- image: JPG or PNG up to 5 MB
- video: MP4 up to 16 MB
- document: PDF up to 100 MB

The file is sent to Meta as a sample and saved as the template's default header for later sends.

6. **Message body** (up to 1,024 characters). Use the toolbar for **bold**, *italic*, strikethrough and emojis.

7. **Variables:** click **+ Add variable** to insert `{{1}}`, `{{2}}` and so on, for things that change per person such as a name or order number. For each variable, give a **label** (what it means, for example "Customer name") and an **example** (for example "Priya"). Meta needs the example to approve the template, and your team sees the label when sending.

8. **Footer** (optional, up to 60 characters), for example "Reply STOP to unsubscribe".

9. **Buttons** (optional, up to 10 in total):

- **Quick reply:** tappable answers, like "Order now"
- **Website link:** up to 2. The link can end with a variable, such as an order number.
- **Call number:** 1
- **Copy offer code:** 1, for example DIWALI20

10. Check the preview on the right, then click **Submit to Meta for approval**.

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New template

Template name: diwali_greetings Language: English

Lowercase letters, numbers and _ only. Your customers never see it.

Marketing
Offers, launches, festive wishes, re-engagement

Utility
Order, booking, payment and account updates

Authentication
One-time passwords (OTP) for login or verification

Header optional

None Text Image Video Document

Message body

B / S { } 🍪 🍬 🍩 🍫 🍭 🍮 🍯 🍡 🍢 🍣 🍤 🍥 🍦 🍧 🍨 🍪 🍫 🍬 🍭 🍮 🍯 🍡 🍢 🍣 🍤 🍥 🍦 🍧 🍨

+ Add variable

Namaste {{1}}! Wishing you and your family a very happy Diwali from all of us at Sharma Sweets. 🍪

98/1024

What goes in each variable?

Tips for quick approval

- Use variables for things that change per person (name, order no.). Label each one so your team knows what to fill.
- Give realistic examples. Meta reviews using them.
- Marketing messages should offer a way to opt out (e.g. a "Stop" quick reply).
- Pick the right category. Meta may move a "Utility" template that contains offers into Marketing.

A template being written, with its preview

Tips for quick approval

- A variable can't be the very first or very last thing in the message.
- Number the variables in order: {{1}} before {{2}} .
- Use realistic examples, and explain what each variable is.
- Marketing messages should offer a way to opt out.
- Pick the right category. Meta may move a "Utility" template that contains an offer into Marketing.

The builder warns you about these rules before you submit.

Tip Meta limits how often an approved template can be edited. To change one, it's usually quicker to **Duplicate** it, edit the copy and submit it as a new template.

Send a campaign

Send a template to many contacts in seven simple steps.

A campaign sends an approved template to many contacts at once, with each person's name and details filled in. Click **Campaigns → + New campaign**, or **New campaign** on the dashboard.

The wizard has seven steps. The progress bar at the top shows where you are, and you can click a finished step to go back. On the right, a phone preview shows the message exactly as customers will see it, with a summary below.

Step 1: Name

Give the campaign a name only your team sees, for example "Diwali offer – Pune customers". Click an idea to use it, or type your own.

Summary	
Name	Diwali offer – Pune customers
Recipients	22
Template	—
Meta charges	—
When	Now
Plan messages left	9,983

Step 1: name the campaign

Step 2: Audience

Choose who receives it:

- **All contacts:** everyone who hasn't opted out
- **Lists:** everyone in one or more lists, or choose **Let me pick people** to tick individuals inside them
- **Pick people:** search your contacts and tick them
- **Tags:** everyone with any of the chosen tags

- **Paste numbers:** type or paste numbers, one per line or separated by commas
- **Upload a file:** a one-off Excel or CSV of numbers. You can save it as a new list at the same time.

The green counter shows how many people will receive it. Opted-out contacts and duplicates are removed automatically. Keep **Skip numbers we know aren't on WhatsApp** ticked to avoid paying for messages that can't arrive.

The screenshot shows the 'New campaign' workflow in the Nezler Connect interface. The progress bar at the top indicates seven steps: 1. Name, 2. Audience (current step), 3. Template, 4. Personalise, 5. Preview, 6. Schedule, and 7. Review.

STEP 2 OF 7: Who should receive it?
 Opted-out contacts and duplicate numbers are removed automatically.

Selection options for the audience:

- All contacts:** Everyone who hasn't opted out
- Lists:** Everyone in one or more lists (Selected)
- Pick people:** Search and tick contacts
- Tags:** Contacts with any of the tags
- Paste numbers:** Type or paste phone numbers
- Upload a file:** One-off Excel or CSV

Choose lists:

- Corporate gifting 4
- Diwali 2025 buyers 10
- Pune customers 15** (Selected)
- Wholesale buyers 5

Buttons: **Everyone in these lists** (Active), **Let me pick people**

☒ Skip numbers we know aren't on WhatsApp

14 will receive it

Tip: to send to a filtered group (e.g. City = Pune), filter on **Contacts**, tick "select all matching", then click **Send campaign**.

Buttons: **← Back**, **Next →**

Right Panel (Preview):

Sharma Sweets Business account

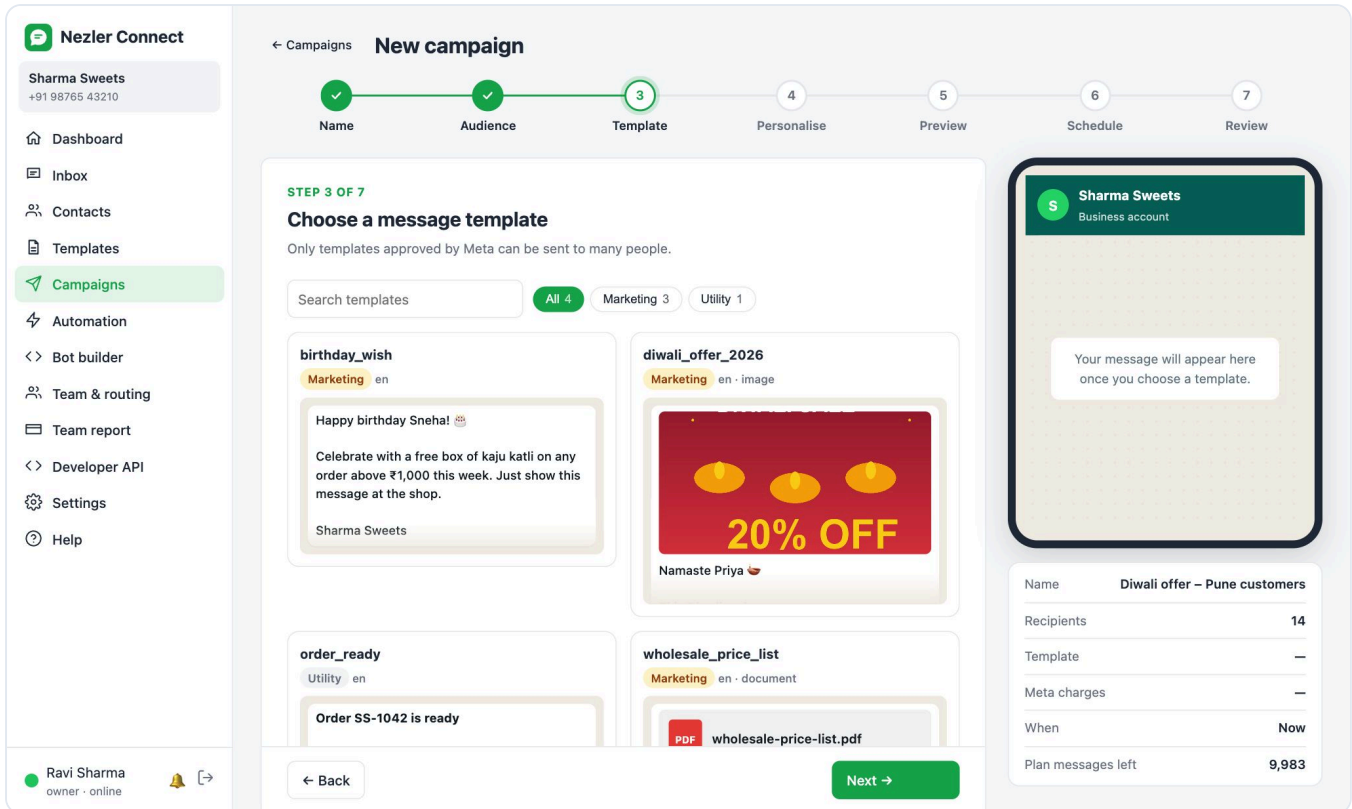
Your message will appear here once you choose a template.

Name	Diwali offer – Pune customers
Recipients	14
Template	—
Meta charges	—
When	Now
Plan messages left	9,983

Step 2: choose the audience

Step 3: Template

Pick an approved template. Use the search box or the category buttons to find it quickly.



Step 3: choose a template

Step 4: Personalise

Each placeholder in the template is listed with its meaning. For each one, choose what to fill it with:

- a **contact column**, such as Name or City. Every person gets their own value. Add a **fallback**, such as "there", used when a contact's value is empty, so nobody gets "Hi ,".
- **Type text**: the same words for everyone, such as a date or a store name.

If the template has an image, video or PDF header, the file saved with the template is used. Paste another public link to send something different.

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← Campaigns

New campaign

✓

✓

✓

4

5

6

7

Name

Audience

Template

Personalise

Preview

Schedule

Review

STEP 4 OF 7

Personalise the message

Fill each placeholder from a contact column, or type text that is the same for everyone.

PLACEHOLDER	MEANING	FILL WITH	VALUE / FALLBACK
{{1}}	Customer name e.g. Priya	Name	there
{{2}}	City e.g. Pune	City	Pune

Header file

The file saved with the template is used. Paste another public https link to send something different.

https://wa.nezler.tech/uploads/t1_26b46ded7759d9e9a142/diwali-offer.jpg

← Back

Next →

S Sharma Sweets

Business account

20% OFF

Namaste Priya Deshpande

This Diwali, enjoy 20% off on all our gift boxes. Order before 30 October for free delivery in Pune.

See you soon at Sharma Sweets!

Reply STOP to unsubscribe

16:26

Order now

Not interested

Name	Diwali offer – Pune customers
Recipients	14
Template	diwali_offer_2026
Meta charges	≈ ₹11.06

Step 4: personalise the message

Step 5: Preview

See the message as your first recipients will receive it, with their real names. Then send a test to your own WhatsApp number: type it and click **Send test**.

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← Campaigns

New campaign

✓

✓

✓

✓

5

6

7

Name

Audience

Template

Personalise

Preview

Schedule

Review

STEP 5 OF 7

Check how it looks

This is the message exactly as your first recipients will see it.

To Priya Deshpande

20% OFF

Namaste Priya Deshpande

This Diwali, enjoy 20% off on all our gift boxes. Order before 30 October for free delivery in Pune.

See you soon at Sharma Sweets!

Reply STOP to unsubscribe

Order now

To Amit Kulkarni

20% OFF

Namaste Amit Kulkarni

This Diwali, enjoy 20% off on all our gift boxes. Order before 30 October for free delivery in Pune.

See you soon at Sharma Sweets!

Reply STOP to unsubscribe

Order now

← Back

Next →

S Sharma Sweets

Business account

20% OFF

Namaste Priya Deshpande

This Diwali, enjoy 20% off on all our gift boxes. Order before 30 October for free delivery in Pune.

See you soon at Sharma Sweets!

Reply STOP to unsubscribe

16:26

Order now

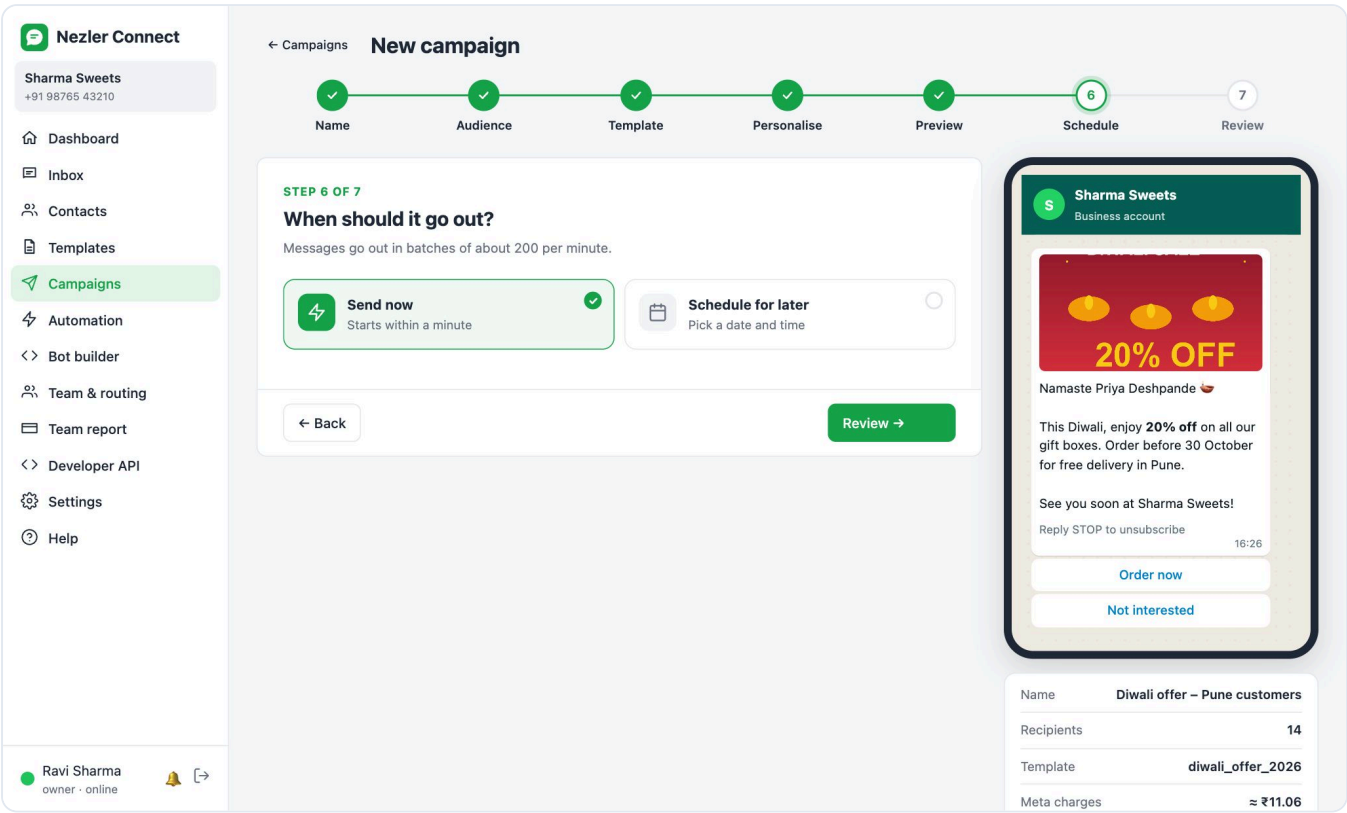
Not interested

Name	Diwali offer – Pune customers
Recipients	14
Template	diwali_offer_2026
Meta charges	≈ ₹11.06

Step 5: preview and send a test

Step 6: Schedule

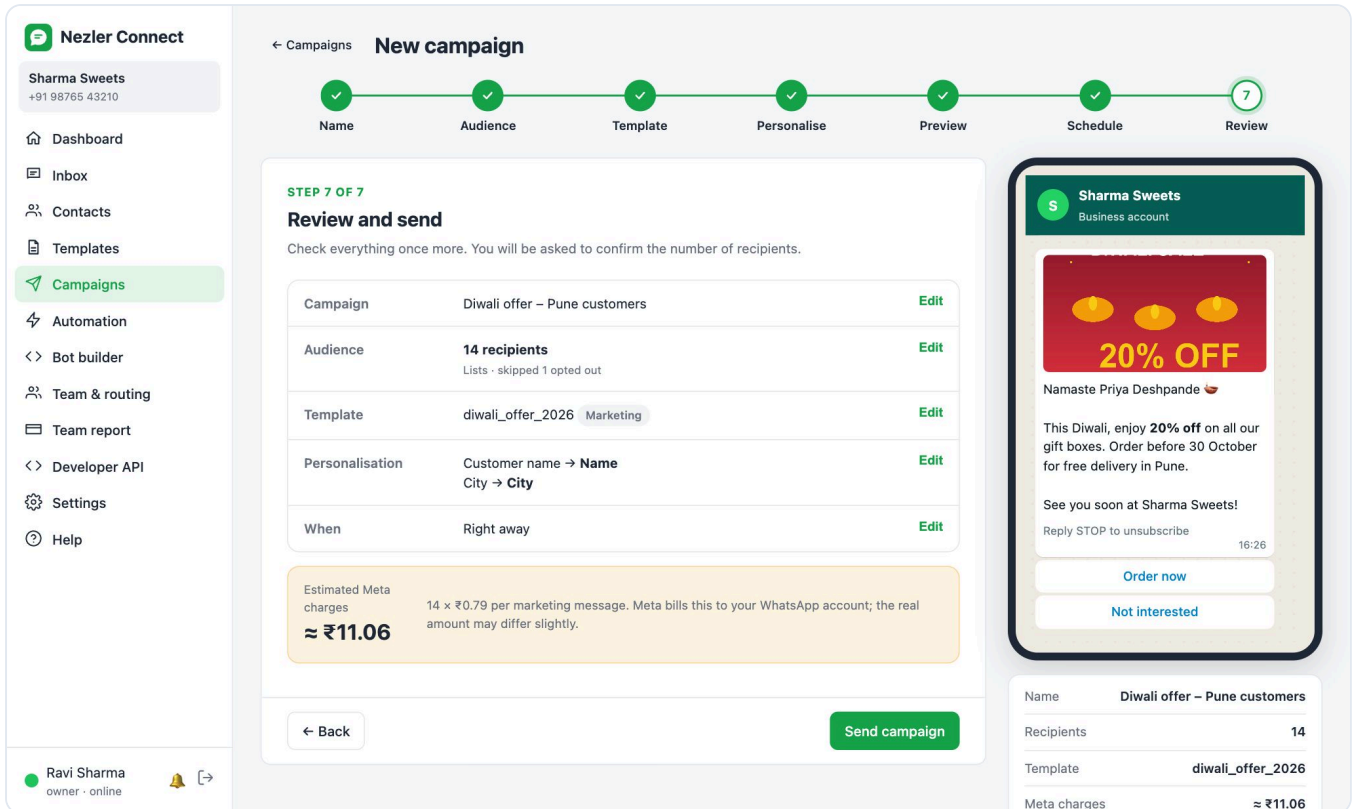
Choose **Send now**, or **Schedule for later** and pick the date and time. Messages go out in batches of about 200 per minute.



Step 6: choose when

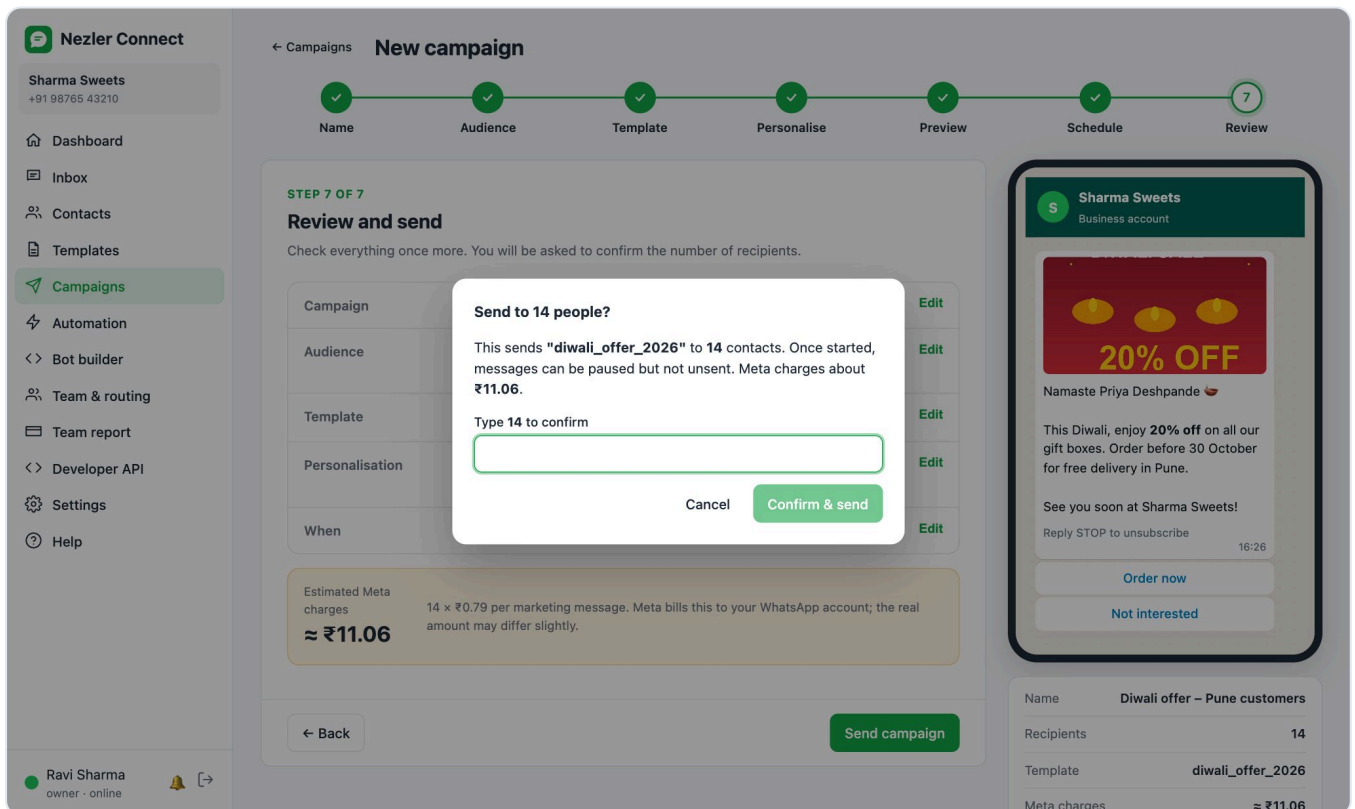
Step 7: Review and send

Check everything once more. Click **Edit** on any row to change it. The yellow box shows the estimated Meta charges.



Step 7: review

Click **Send campaign**. To make sure nobody sends by mistake, you must type the number of recipients before **Confirm & send** becomes active.



The final confirmation

Important Once a campaign starts, messages can be paused but not unsent. Always send yourself a test first.

Tip To send to a filtered group, for example everyone in Pune whose birthday is this month, filter on the [Contacts page](#), select all matching, then click **Send campaign**. The wizard opens with those people already chosen.

Track campaign results

See who received and read your campaign, and pause it if needed.

The **Campaigns** page lists every campaign with its template, status, schedule and results.

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Campaigns

[+ New campaign](#)

NAME	TEMPLATE	STATUS	SCHEDULED	SENT	DELIVERED	READ	FAILED
Wholesale festive price list	wholesale_price_list	Scheduled	22 Oct, 10:00 AM	0/4	0	0	0
Diwali offer – past buyers	diwali_offer_2026	Completed	21 Oct, 04:25 PM	10/10	8	6	0

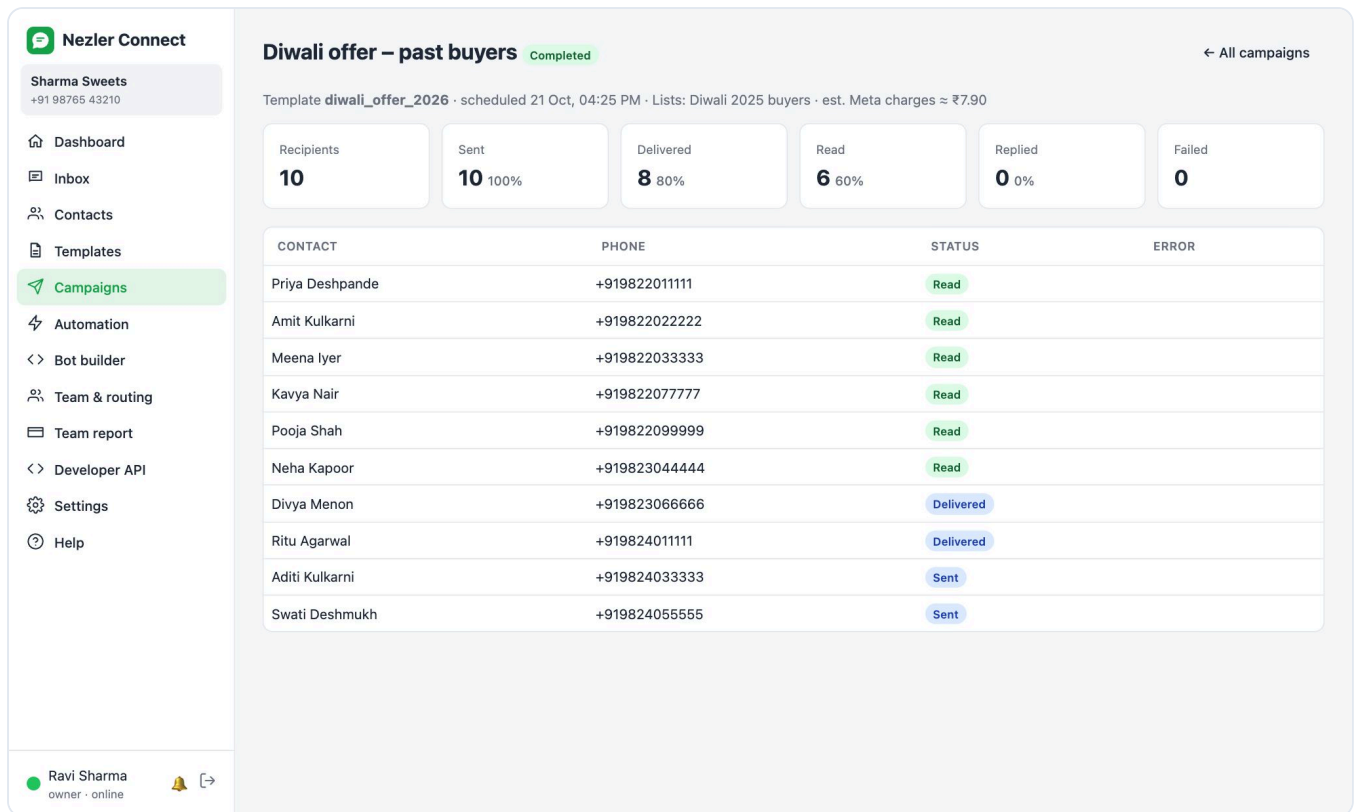
The Campaigns page

Statuses:

- **Scheduled:** waiting for its date and time
- **Running:** sending now
- **Paused:** stopped by you, and can be resumed
- **Completed:** everyone has been sent the message
- **Cancelled:** stopped for good

Campaign report

Click a campaign to open its report.



A campaign report

The tiles show:

- **Recipients:** how many people it was for
- **Sent:** accepted by WhatsApp
- **Delivered:** reached the phone
- **Read:** opened, for people who have read receipts on
- **Replied:** wrote back after the campaign was sent
- **Failed:** could not be sent

Below the tiles, every recipient is listed with their status and, if it failed, the reason. Common reasons are a number that isn't on WhatsApp, or Meta limiting marketing messages to a person who already received many that day.

Control a campaign

Buttons at the top of the report, depending on its status:

- **Send now:** start a scheduled campaign immediately
- **Pause** and **Resume**
- **Cancel:** stop it for good. Messages already sent stay sent.

Tip Replies to a campaign arrive in the **Inbox** like any other chat. Use **routing rules** to send campaign replies to your sales team automatically.

Welcome, away and keyword replies

Answer common questions automatically, day and night.

Automatic replies answer customers instantly, even at night or when your team is busy. Open **Automation** in the menu.

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Automation

Welcome message

☒ Send automatically when a new customer messages you for the first time

Namaste {name}! 🙏 Welcome to Sharma Sweets. Reply *menu* to see today's specials.

Away message

☒ Reply automatically outside business hours (at most once every 6 hours per customer)

Business hours 09:00 AM to 09:00 PM Asia/Kolkata

Thanks for writing! Our shop is closed right now. We'll reply first thing in the morning.

Customers can always reply **STOP** to opt out and **START** to opt back in. This is handled automatically.

Save

Quick replies for agents

Saved answers. Type / in the inbox to insert one.

/address Sharma Sweets, 14 FC Road, Shivajinagar, Pune 411005. Google Maps: https://maps.app.goo.gl/sharmasw...

Keyword auto-replies

If an incoming message matches a keyword, this reply is sent instantly. The first matching rule wins.

Keyword	Reply	Action
price	Our price list is here: kaju katli ₹1,100/kg, motichoor laddoo ₹640/kg, soan papdi ₹480/kg.	✗
timing	We are open 9 am to 9 pm, all 7 days.	✗
address	Sharma Sweets, 14 FC Road, Shivajinagar, Pune 411005.	✗

Keyword e.g. price contains

Our prices start at ₹499. See the full list: https://...

+ Add rule

The Automation page

Welcome message

Sent automatically the first time a new customer messages you.

1. Tick **Send automatically when a new customer messages you for the first time**.
2. Write the message. {name} becomes the customer's WhatsApp name.
3. Click **Save**.

Away message

Sent when someone writes outside your business hours, at most once every 6 hours per customer.

1. Tick **Reply automatically outside business hours**.
2. Set your **business hours**, for example 09:00 to 21:00. They use your time zone from [Settings](#).
3. Write the message, for example "We're closed right now. We'll reply first thing in the morning!"
4. Click **Save**.

Keyword auto-replies

Answer common questions such as price, timings or address automatically.

1. Under **Keyword auto-replies**, type the keyword, for example `price`.
2. Choose how it should match: **contains**, **is exactly** or **starts with**. Matching ignores capital letters.
3. Write the reply and click **+ Add rule**.

If a message matches several rules, the first one in the list wins. Click X to delete a rule.

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Welcome message

☒ Send automatically when a new customer messages you for the first time

Namaste {name}! 🙏 Welcome to Sharma Sweets. Reply *menu* to see today's specials.

Away message

☒ Reply automatically outside business hours (at most once every 6 hours per customer)

Business hours: 09:00 AM to 09:00 PM Asia/Kolkata

Thanks for writing! Our shop is closed right now. We'll reply first thing in the morning.

Customers can always reply **STOP** to opt out and **START** to opt back in. This is handled automatically.

Save

Quick replies for agents

Saved answers. Type / in the inbox to insert one.

/address	Sharma Sweets, 14 FC Road, Shivajinagar, Pune 411005. Google Maps: https://maps.app.goo.gl/sharmasw...	X
/thanks	Thank you for shopping with Sharma Sweets! 😊	X
/upi	You can pay by UPI to sharmasweets@okicici. Please share a screenshot once done.	X

Keyword replies and quick replies

Quick replies for agents

Quick replies are saved answers your team can insert in any chat. Nothing is sent automatically.

1. Under **Quick replies for agents**, enter a short name, for example `address`, and the full text.
2. Click **+ Add quick reply**.
3. In a chat, type `/` to pick from the list. See [Reply to customers](#).

Opt-out is built in

Customers can always reply **STOP** to stop receiving campaigns, and **START** to receive them again. You don't need to set this up.

Tip A chatbot runs before keyword replies. For menus and questions, see [Build a chatbot](#).

AUTOMATION

Build a chatbot

Drag and drop menus, questions and hand-overs, then test before going live.

The bot builder lets you design a WhatsApp chatbot by placing blocks on a canvas and connecting them, with no coding. A bot can greet customers with a menu, answer questions, ask for details and save them to the contact, then hand the chat to the right person.

Important The bot builder depends on your plan. If you don't see **Bot builder** in the menu, ask us to upgrade your plan.

Your bots

Open **Bot builder** in the menu. Each bot shows:

- what starts it, for example a keyword
- its order
- how many times it has run
- how many chats it's handling now
- whether it is **On** or **Off**

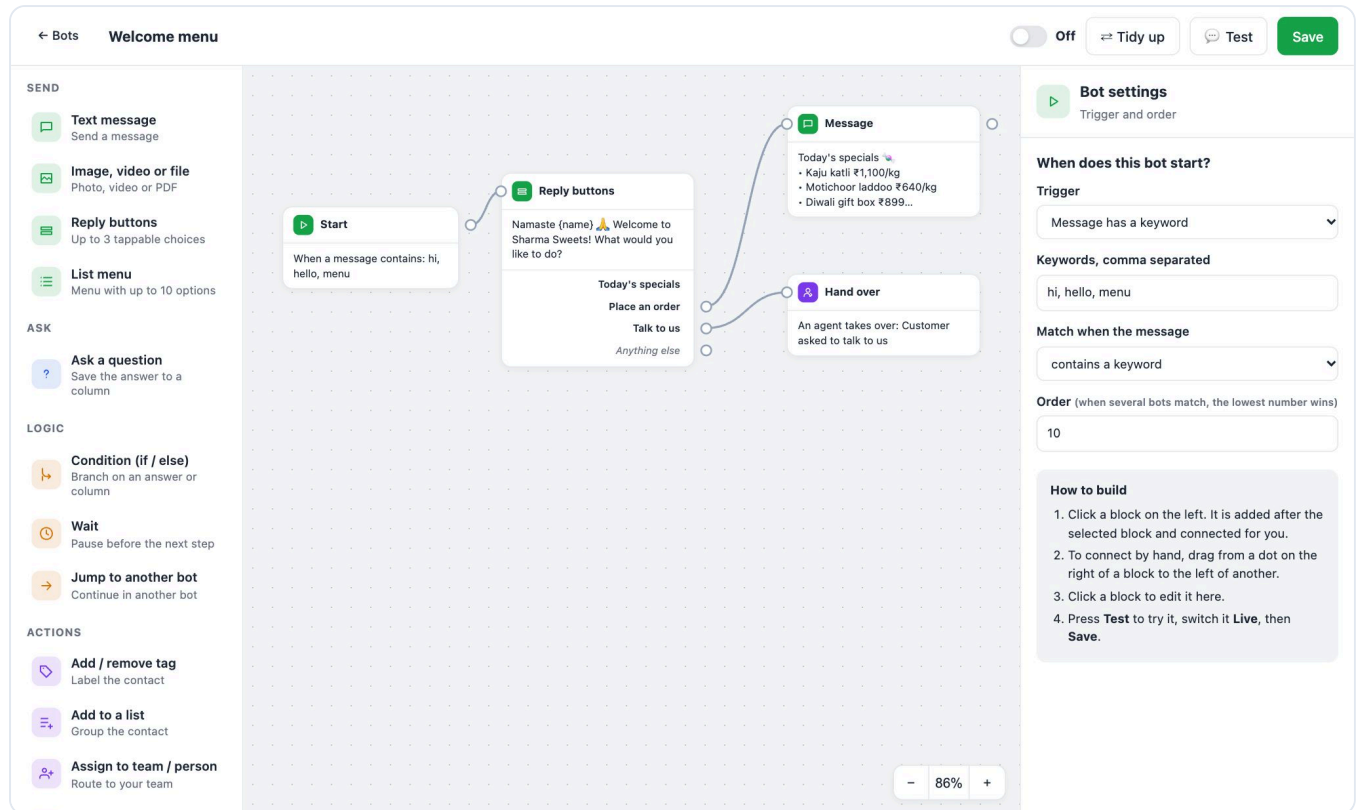
To create one, type a name and click **+ New bot**. It starts with a ready-made welcome menu you can change.

The screenshot shows the 'Bot builder' interface in the Nezler Connect application. On the left is a sidebar with a navigation menu including Dashboard, Inbox, Contacts, Templates, Campaigns, Automation, Bot builder (highlighted), Team & routing, Team report, Developer API, Settings, and Help. The main area is titled 'Bot builder' and contains a table listing bots. A 'Welcome menu' bot is shown with details: v2 - edited 21 Oct, 04:24 PM, Keyword: hi, hello, menu, Order: 10, Runs: 0, Live Chats: 0, and Status: Off. Action buttons for Edit, Turn on, Duplicate, and Delete are visible for this bot. A '+ New bot' button is in the top right corner.

BOT	STARTS WHEN	ORDER	RUNS	LIVE CHATS	STATUS	
Welcome menu v2 - edited 21 Oct, 04:24 PM	Keyword: hi, hello, menu	10	0	0	Off	Edit Turn on Duplicate Delete

The list of bots

The builder



The builder: blocks on the left, canvas in the middle, settings on the right

- **Left:** the blocks you can add, grouped as **Send**, **Ask**, **Logic** and **Actions**.
- **Middle:** the canvas. Every bot begins at **Start** and flows from left to right.
- **Right:** the settings panel for whatever you've selected.
- **Top:** the bot's name, the **Live** switch, **Tidy up**, **Test** and **Save**.

Add and connect blocks

- **Click** a block on the left. It's added after the block you have selected, and connected for you.
- Or **drag** a block onto the canvas, then drag from the dot on the right of one block to the left side of another to connect them.
- Drag blocks around to move them. **Tidy up** arranges everything neatly.
- Use the **–**, **+** and percentage buttons at the bottom right to zoom. The percentage button fits the whole bot on screen.

Edit a block

Click a block to edit it in the panel on the right. Changes appear on the block straight away.

← Bots

Welcome menu

Off

Tidy up

Test

Save

SEND

Text message

Send a message

Image, video or file

Photo, video or PDF

Reply buttons

Up to 3 tappable choices

List menu

Menu with up to 10 options

ASK

Ask a question

Save the answer to a column

LOGIC

Condition (if / else)

Branch on an answer or column

Wait

Pause before the next step

Jump to another bot

Continue in another bot

ACTIONS

Add / remove tag

Label the contact

Add to a list

Group the contact

Assign to team / person

Route to your team

Start

When a message contains: hi, hello, menu

Reply buttons

Namaste {name} 🙏 Welcome to Sharma Sweets! What would you like to do?

Today's specials

Place an order

Talk to us

Anything else

Message

Today's specials 🙏

• Kaju katli ₹1,100/kg

• Motichoor laddoo ₹640/kg

• Diwali gift box ₹899...

Hand over

An agent takes over: Customer asked to talk to us

Reply buttons

Edit this block

Message

Namaste {name} 🙏 Welcome to Sharma Sweets! What would you like to do?

Insert: {name} {phone} {email} {city}

{customer_type} {birthday}

Options (max 3, 20 letters each)

1 Today's specials

2 Place an order

3 Talk to us

Each option gets its own connector on the block.

"Anything else" catches typed replies.

86%

Duplicate

Delete block

Editing a Reply buttons block

The blocks:

Block	What it does
Text message	Sends a message. Use {name}, {city} and other columns.
Image, video or file	Sends a photo, MP4 video or PDF. Upload it or paste a link.
Reply buttons	A message with up to 3 tappable buttons. Each button has its own connector.
List menu	A menu with up to 10 options, for longer choices.
Ask a question	Waits for an answer and saves it to a contact column, such as City. Can require a number, email or phone.
Condition	Checks an answer or column, for example "City is Pune", and goes Yes or No .
Wait	Pauses for minutes, hours or days before the next step.
Jump to another bot	Continues in a different bot.
Add / remove tag	Labels the contact, for example "hot-lead".
Add to a list	Puts the contact into one of your lists.
Assign to team / person	Sends the chat to a team or teammate and stops the bot.
Hand over to a human	Stops the bot so your routing rules pick someone.
End conversation	Stops the bot.

Reply buttons and **List menu** also have an **Anything else** connector for when the customer types something instead of tapping.

Use **Duplicate** or **Delete block** at the bottom of the panel.

When does the bot start?

Click an empty part of the canvas, or the **Start** block, to see **Bot settings**:

- **Trigger**: a keyword (for example "hi, hello, menu"), any message, a new contact's first message, a template button tap, or outside business hours
- **Match**: contains, is exactly, or starts with the keyword
- **Order**: when several bots match, the lowest number wins

Test, switch on, save

1. Click **Test** to chat with your bot like a customer. Nothing is sent on WhatsApp. Tap the buttons, type answers, and click **Restart** to try again.
2. Switch the bot to **Live**.
3. Click **Save**. You can also press Ctrl + S (Cmd + S on Mac).

← Bots

Welcome menu

Off

Tidy up

Test

Save

SEND

Text message

Send a message

Image, video or file

Photo, video or PDF

Reply buttons

Up to 3 tappable choices

List menu

Menu with up to 10 options

ASK

Ask a question

Save the answer to a column

LOGIC

Condition (if / else)

Branch on an answer or column

Wait

Pause before the next step

Jump to another bot

Continue in another bot

ACTIONS

Add / remove tag

Label the contact

Add to a list

Group the contact

Assign to team / person

Route to your team

Start

When a message contains: hi, hello, menu

Reply buttons

Namaste (name) 🙏 Welcome to Sharma Sweets! What would you like to do?

Today's specials

Place an order

Talk to us

Anything else

Message

Today's specials 🙏

• Kaju katli ₹1,100/kg

• Motichoor laddoo ₹640/kg

• Diwali gift box ₹899...

Hand over

An agent takes over: Customer asked to talk to us

Test your bot

Restart

×

Talk to the bot like a customer. Nothing is sent on WhatsApp and nothing is saved.

Namaste Test Customer 🙏 Welcome to Sharma Sweets! What would you like to do?

Today's specials

Place an order

Talk to us

Today's specials

Today's specials 🙏

• Kaju katli ₹1,100/kg

• Motichoor laddoo ₹640/kg

• Diwali gift box ₹899

Reply with what you'd like and we'll get it ready.

— end of bot —

Type a message, e.g. hi

Send

Testing the bot

Tip A bot stops as soon as someone from your team replies in that chat, and agents can pause it from the Inbox. Bot replies are free because the customer wrote first.

TEAM

Add team members and roles

Invite your staff and decide what each person can see and do.

Invite your staff so several people can answer WhatsApp from the same number. Open **Team & routing** in the menu. Only the owner and admins can manage the team.

Team & routing Team report →

Members 3 of 5 on your plan

NAME	ROLE	TEAMS	OPEN CHATS	ACCESS
Ravi Sharma ravi@sharmasweets.demo	Owner	☒ Retail orders ☐ Wholesale & corporate	1	Save
Rohan Mehta rohan@sharmasweets.demo	Mana	☐ Retail orders ☒ Wholesale & corporate	2	☒ Active Save Remove
Asha Verma asha@sharmasweets.demo	Agent	☒ Retail orders ☐ Wholesale & corporate	2	☐ No contact export ☐ No campaigns ☒ Active Save Remove

Invite a teammate

Name Email Agent: own chats and their team queues ▼

☐ Retail orders ☐ Wholesale & corporate

Send invite

Teams

Group people by department, product or project, e.g. Sales, Support, Project Skyline. Chats sent to a team are shared among its members.

The Team & routing page

Roles

Role	What they can do
Owner	Everything, including settings, billing and the team
Admin	Everything except removing the owner
Manager	Sees all chats, reassigns chats and sees reports
Agent	Sees their own chats and their teams' queues

For agents you can also block **contact export** and **campaigns** with the tick boxes under **Access**.

The number of team members depends on your plan. It's shown next to **Members**.

Invite a teammate

1. Under **Invite a teammate**, enter their name and email.

2. Choose their role, and tick the teams they belong to.
3. Click **Send invite**.

They receive an email with a link to set their own password. If the email doesn't arrive, the page shows the invite link so you can send it to them on WhatsApp.

Change or remove a member

Change someone's role, teams or access in their row and click **Save**. Click **Remove** to take away their access. Their open chats become unassigned.

Online status

A green dot next to a name means the person is online now. When routing picks someone from a team, it prefers people who are online.

Teams, routing rules and reports

Send each chat to the right person automatically and track response times.

Routing sends each new chat to the right person automatically, for example wholesale enquiries to the wholesale team and everyone else to retail.

Teams

A team is a group of people who share chats, such as Sales, Support, a product or a project.

1. On **Team & routing**, scroll to **Teams**.
2. Enter a team name and tick its members.
3. Choose how chats are shared:
 - **Taking turns (round-robin)**: each new chat goes to the next person
 - **Least busy person**: goes to whoever has the fewest open chats
 - **Team queue (anyone picks)**: chats wait in the team's queue until someone takes one
4. Keep **Returning customers go to the same person as last time** ticked so regulars talk to someone they know.

Routing rules

A rule says **if** a chat matches some conditions, **then** send it to a team or person.

1. Under **Automatic routing**, give the new rule a name.
2. Add conditions. You can use:
 - the message containing any of some keywords, for example "bulk, wholesale"
 - a contact column, for example Customer type is Wholesale, or Project is Skyline
 - the contact being in a list, or having a tag
 - the customer replying to a campaign in the last 3 days
 - the time of day: inside or outside business hours
 - the customer type: new (first message ever) or returning
3. Choose whether **ALL conditions** or **ANY condition** must match.
4. Choose the team or person to send it to, and set the order. Lower numbers are checked first, and the first matching rule wins.
5. Keep **Active** ticked and click **+ Add rule**. To change a rule later, edit it and click **Save rule**.

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Ravi Sharma

owner · online

Automatic routing

When a customer writes and nobody is handling the chat yet, rules run top to bottom and the first match decides where the chat goes. Use the contact columns from your imports (e.g. **Product** = Home loan or **Project** = Skyline) to route by product or project.

If no rule matches, send to

Alert if a customer waits longer than (minutes, blank = off)

When that happens

Save

Leave unassigned

15

Alert the agent and managers

Rule name

Order (lower runs first)

Match

Wholesale customers

10

ANY condition

IF

Contact column

Customer type

is

wholesale

Message contains any of

bulk, wholesale, corporate

+ Condition

THEN send to

Wholesale & corporate

Active

Save rule

Delete

Rule name

Order (lower runs first)

Match

Everyone else

90

ANY condition

IF

Customer type

New (first message ever)

+ Condition

THEN send to

Retail orders

Active

Save rule

Delete

Rule name

Order (lower runs first)

Match

e.g. Home loan enquiries

30

ALL conditions

IF

Message contains any of

flat, 2bhk, site visit

Routing rules

Choose what happens to chats that match no rule with **If no rule matches, send to**: a team, a person, or leave them unassigned for anyone to pick up.

Late-reply safety net

In the same **Automatic routing** box, set **Alert if a customer waits longer than** a number of minutes. Then choose **When that happens**: alert the agent and managers, or move the chat to someone else in the team. Click **Save**.

Team report

Click **Team report** to see, for today or the last 7, 30 or 90 days:

- customers waiting for a reply right now
- open chats, and late replies that triggered an alert
- for each person: open chats, chats handled, messages sent, average reply time and resolved chats
- for each team: open chats, chats waiting in the queue, chats routed in and average reply time

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Team report

Today 7 days 30 days 90 days

Waiting for an owner now
1

Open chats now
5

Late replies (SLA alerts)
0

PERSON	OPEN NOW	CHATS HANDLED	MESSAGES SENT	AVG REPLY TIME	RESOLVED
Ravi Sharma owner	1	13	6	1s	0
Asha Verma agent	2	0	0	—	0
Rohan Mehta manager	2	0	0	—	0

TEAM	OPEN NOW	WAITING IN QUEUE	CHATS ROUTED IN	AVG REPLY TIME
Retail orders	0	0	0	1s
Wholesale & corporate	2	0	3	—

Reply time = how long a customer waited between their message and the next reply from your team.

The team report

Reply time is how long a customer waited between their message and the next reply from your team.

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Business settings and password

Your business name, time zone, plan and password.

Open **Settings** in the menu.

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Ravi Sharma
owner - online

Business

Business name
Sharma Sweets

Timezone
Asia/Kolkata

Save

Plan

Growth - 17 / 10,000 messages this month

Up to 10,000 contacts and 5 team members.

Valid until **14 Nov 2026**

To upgrade or renew, email support@nezlertech.com

Team

Invite teammates, create teams like Sales or Support, and set up automatic chat routing on the [Team & routing](#) page.

Manage team →

API & webhooks

Connect your CRM, website or billing software. API keys, webhooks and request logs are on the [Developer API](#) page.

Open Developer API →

Change my password

Current password New password (8+) Change

Business settings, plan and password

WhatsApp connection

Shows the connected number and lets you test it. See [Connect your WhatsApp number](#).

Business

- **Business name:** shown to your team across the app.
- **Timezone:** used for business hours, scheduled campaigns and reports.

Click **Save** after changing them.

Plan

Shows your plan, messages used this month out of your limit, your contact and team limits, and the date your plan is valid until. To upgrade or renew, use the contact email shown on the page.

Tip When the monthly message limit is reached, sending stops until the next month or an upgrade. Customers' messages still arrive in your Inbox.

Change your password

At the bottom of the page, enter your current password and a new one of at least 8 characters, then click **Change**. Forgot it? Use **Forgot password?** on the login page.

Use it from Claude or ChatGPT

Run campaigns, check reports and make templates just by chatting with an AI assistant.

Connect an AI assistant such as **Claude** or **ChatGPT** to your Nezler Connect account, then just ask it what you need. For example:

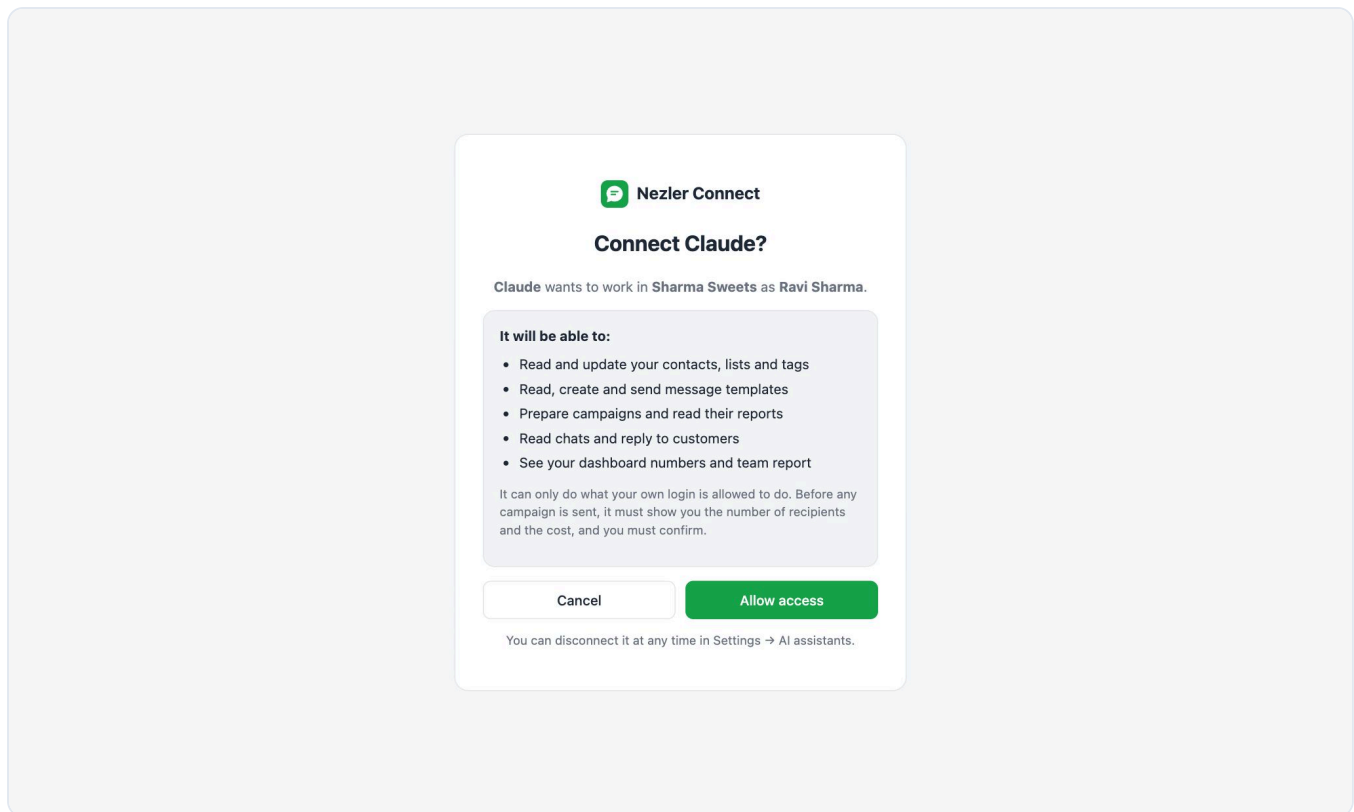
- "How did last week's Diwali campaign do? Who hasn't read it yet?"
- "Send the Diwali offer to everyone in my Pune customers list tomorrow at 10 am."
- "Make a template from this poster with a 'Order now' button, and tell me when Meta approves it."
- "Add Lata Joshi, 9811223344, from Pune, to the Ganpati 2027 list."
- "Which chats are waiting for a reply? Summarise them for me."

The assistant uses your account the same way you do. It can only do what your own login is allowed to do.

Important AI assistants depend on your plan. If you don't see **AI assistants** under Settings, ask us to switch it on.

Connect Claude

1. Open **Settings** in Nezler Connect and find **AI assistants**. Copy the **Connector URL** (click it to copy). It looks like `https://wa.nezler.tech.com/mcp`.
2. In Claude (claude.ai or the Claude app), open **Settings → Connectors** and click **Add custom connector**.
3. Name it **Nezler Connect**, paste the URL and click **Add**.
4. Click **Connect**. A Nezler Connect page opens. Log in if asked.
5. Check the business name and click **Allow access**.



The page that asks you to allow access

That's it. In a new chat, Claude can now use Nezler Connect. You may need to switch the connector on from the tools menu in the chat.

Connect ChatGPT or other apps

- **ChatGPT:** in Settings, turn on **Developer mode** for apps and connectors, then create a connector with the same URL and sign in. The exact menu names change from time to time; look for "connectors" or "apps".
- **Other apps that support MCP** (Claude Desktop, Claude Code, Cursor and others): add a **remote MCP server** with the URL. If the app asks for a token instead of signing in, create an API key on the [Developer API](#) page and use it as a Bearer token. The key's permissions decide what the app can do.

What it can do

Area	Examples
Account	Plan, messages used this month, dashboard numbers
Contacts	Search and filter by any column, add or update people, add them to lists
Templates	List them with their status, create new ones with an image, video or PDF header, check if Meta approved them
Campaigns	Prepare a campaign, show the recipients, cost and preview, send or schedule it after you confirm, read reports, pause or cancel
Inbox	List chats waiting for a reply, read a conversation, reply within 24 hours, send a template
Team & bots	Team report, list chatbots, switch a bot on or off

Campaigns always need your OK

When you ask for a campaign, the assistant first **prepares** it. Nothing is sent at this stage. It shows you:

- how many people will receive it, and who was skipped
- the estimated Meta charges
- how the message will look for real recipients

Only when you clearly say yes does it send, and it must repeat the exact number of recipients. If the audience changes in the meantime, it has to prepare the campaign again.

See and control what it does

Under **Settings → AI assistants** you'll find:

- **Connected apps:** which assistants are connected, who connected them and when they were last used. Click **Disconnect** to cut one off immediately.
- **Recent activity:** every action an assistant took, and any errors.

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AI assistants Claude, ChatGPT and others

Connect an AI assistant to work in your account by chatting: "send the Diwali offer to my Pune list tomorrow at 10", "how did last week's campaign do?", "make a template from this poster". It can only do what your login allows, and it must show you the recipients and cost before any campaign is sent.

CONNECTOR URL <https://wa.nezler.tech.com/mcp>

▼ How to connect

1. **Claude** (claude.ai or the Claude app): Settings → Connectors → **Add custom connector**. Name it Nezler Connect, paste the URL above, click **Add**, then **Connect** and allow access.

2. **ChatGPT**: Settings → Apps & Connectors → Advanced → turn on Developer mode, then **Create** a connector with the URL above and sign in.

3. **Other apps** that support MCP: add a remote MCP server with the URL above. If the app asks for a token instead of signing in, use an API key from the [Developer API](#) page.

Full guide: [Use Nezler Connect from Claude or ChatGPT](#).

Connected apps

Claude

Connected by Ravi Sharma · 21 Oct, 04:42 PM · last used 21 Oct, 04:42 PM

Disconnect

Recent activity

WHEN	APP	ACTION	DETAILS
21 Oct, 04:42 PM	Claude Ravi Sharma	list_chats	{"filter!":"unread"}
21 Oct, 04:42 PM	Claude Ravi Sharma	send_campaign	Sent campaign #3 to 5 people
21 Oct, 04:42 PM	Claude Ravi Sharma	prepare_campaign	Prepared draft #3 for 5 people
21 Oct, 04:42 PM	Claude Ravi Sharma	list_templates	{"status":"APPROVED"}
21 Oct, 04:42 PM	Claude Ravi Sharma	search_contacts	Found 15 contacts

Connected apps and recent activity in Settings

Tip Each person connects with their own login. An agent's assistant can only see that agent's chats, and can't send campaigns if the owner has blocked campaigns for them.

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Developer API and webhooks

Connect your website, CRM or billing software.

The Developer API connects Nezler Connect to your own systems, for example to send an order confirmation from your website, or to add new leads from your CRM. This page is for whoever looks after your website or software. Open **Developer API** in the menu.

Developer API [OpenAPI file \(for Postman\)](#)

Connect your website, CRM, Shopify or billing software. Base URL: <https://wa.nezlerconnect.com/api/v1>

API keys Request log Webhooks Docs & examples

API keys

NAME	KEY	PERMISSIONS	EXPIRES	IP ALLOW-LIST	LAST USED
Website orders	nc_5e23bd8...	messages:send, messages:read, contacts:write	never	any	never Revoke

Create a key

Name: Expires: Only allow these IPs (optional):

Permissions

- ☒ Send messages messages:send ☒ Read messages & statuses messages:read ☒ Read contacts contacts:read
- ☒ Create / update / delete contacts contacts:write ☒ Read lists lists:read ☒ Manage lists lists:write ☒ Read templates templates:read
- ☒ Read campaigns campaigns:read ☒ Create / control campaigns campaigns:write ☒ Read plan & usage account:read

Give each app only what it needs. For example, a website order system usually needs just `messages:send` and `contacts:write`. Your plan allows 120 requests per minute per key.

[Create key](#)

Request log last 7 days [All](#) [Errors only](#)

Last 24 hours: 0 requests - 0 errors - no traffic

TIME	KEY	REQUEST	STATUS	TIME TAKEN	IP	ERROR
No API requests yet.						

The Developer API page

Important The Developer API depends on your plan. If you don't see it in the menu, ask us to upgrade your plan.

API keys

1. Under **Create a key**, give it a name, such as "Website orders".
2. Choose when it **expires**, or **Never**.
3. Optionally limit it to your server's IP addresses.
4. Tick only the **permissions** that system needs. A website that sends order updates usually needs just `messages:send` and `contacts:write`.
5. Click **Create key** and copy it straight away. It's shown only once.

Click **Revoke** to switch a key off immediately. The table shows when each key was last used.

Request log

Shows every API request from the last 7 days: the key used, the request, its status, how long it took, the IP address and any error. Click **Errors only** to find problems quickly.

Webhooks

A webhook sends events to your system the moment they happen, for example a new incoming message or a message being read.

1. Enter your system's URL.
2. Tick the events you want.
3. Click **Save**, then **Send a test event** to check it arrives.

The delivery log shows every attempt. Click **Retry now** to resend a failed one.

Docs and examples

The **Docs & examples** section has ready-to-copy code in cURL, PHP, Node.js and Python. Developers can also download the **OpenAPI file** (top right) to import every endpoint into Postman.

Requests per minute are limited by your plan. Every response says how many requests are left.

Use it on your phone

Reply on the go with the mobile app.

Nezler Connect works on any phone browser. Open **wa.nezler.tech.com** and log in. On a phone, the menu moves to a bar at the bottom: **Inbox**, **Contacts**, **Campaigns**, **Home** and **More**.

Android app

The Nezler Connect Android app gives your team:

- the full Inbox, Contacts and Campaigns, in an app on the home screen
- **notifications** when a customer writes, or when a chat is assigned or transferred to you
- photo, video and document sharing straight from the phone

Ask your Nezler account manager for the app download link. After installing, open it and log in with your usual email and password. Allow notifications when asked.

Add it to your home screen (any phone)

You can also save the website as an app icon:

- **Android (Chrome)**: open the site, tap the : menu and choose **Add to Home screen** or **Install app**.
- **iPhone (Safari)**: open the site, tap the Share button and choose **Add to Home Screen**.

Tip The bot builder and the campaign wizard work on phones, but they're easier on a computer with a bigger screen.

Questions and fixes

Answers to the most common questions and problems.

My message failed with a red "!"

The reason is shown under the message. The most common ones:

- **More than 24 hours since the customer's last message:** send a template instead. See [WhatsApp rules](#).
- **The number isn't on WhatsApp:** check the number and country code.
- **Monthly message limit reached:** your plan's messages for this month are used up. Ask us to upgrade.
- **Meta limited marketing messages to this person:** Meta caps how many marketing messages one person receives from all businesses. Try again another day.

Meta rejected my template

The reason is shown on the Templates page. Usually the wording looks like spam, a variable is at the very start or end, or the category is wrong. Click **Duplicate**, fix it and submit again. See [Create message templates](#).

A customer says they didn't get the campaign

Open the campaign report and find their number. **Delivered** or **Read** means it reached their phone. **Failed** shows why. People who replied STOP are skipped, and so are numbers marked "Not on WhatsApp".

Customers' messages aren't arriving

Check **Settings** → **WhatsApp connection** and click **Test connection**. If it shows an error, contact us. Also check whether a bot or keyword reply answered them automatically: look in **All** in the Inbox.

Can two people reply to the same chat?

Yes. Everyone with access sees the chat update live. To avoid double replies, assign the chat to one person and use [notes](#) to talk to each other.

How do I stop someone from getting offers?

Open the contact and tick **Opted out**. Customers can also reply STOP themselves.

What does it cost to send messages?

Your Nezler Connect plan covers the platform. Meta charges separately for template messages, billed to your WhatsApp account. Replies within 24 hours are free. The campaign wizard estimates the cost before you send.

I forgot my password

Click **Forgot password?** on the login page and follow the email.

How do I get more help?

Email your account manager or write to us on WhatsApp from the green button on our website. Include a screenshot of the problem if you can.