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**

Nezler Technologies · October 2026

Contents

GETTING STARTED

Create your account and log in
Sign up, verify your email and find your way around the dashboard.

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

WhatsApp rules in plain English
The 24-hour window, templates, Meta charges and opt-outs.

INBOX

Reply to customers
Read chats, reply, send files, quick replies and templates.

Assign, transfer and add notes
Share chats with your team without the customer noticing.

CONTACTS

Add and edit contacts
Save customers with their own details such as city or birthday.

Lists, filters and bulk actions
Group contacts, find exactly who you need and act on many at once.

Import from Excel and export
Bring in thousands of contacts at once, and download them any time.

TEMPLATES & CAMPAIGNS

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

Send a campaign
Send a template to many contacts in seven simple steps.

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

AUTOMATION

Welcome, away and keyword replies
Answer common questions automatically, day and night.

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

TEAM

Add team members and roles
Invite your staff and decide what each person can see and do.

Teams, routing rules and reports
Send each chat to the right person automatically and track response times.

ACCOUNT & MORE

Business settings and password
Your business name, time zone, plan and password.

Use it from Claude or ChatGPT
Run campaigns, check reports and make templates just by chatting with an AI assistant.

Developer API and webhooks
Connect your website, CRM or billing software.

Use it on your phone
Reply on the go with the mobile app.

Questions and fixes
Answers to the most common questions and problems.

GETTING STARTED

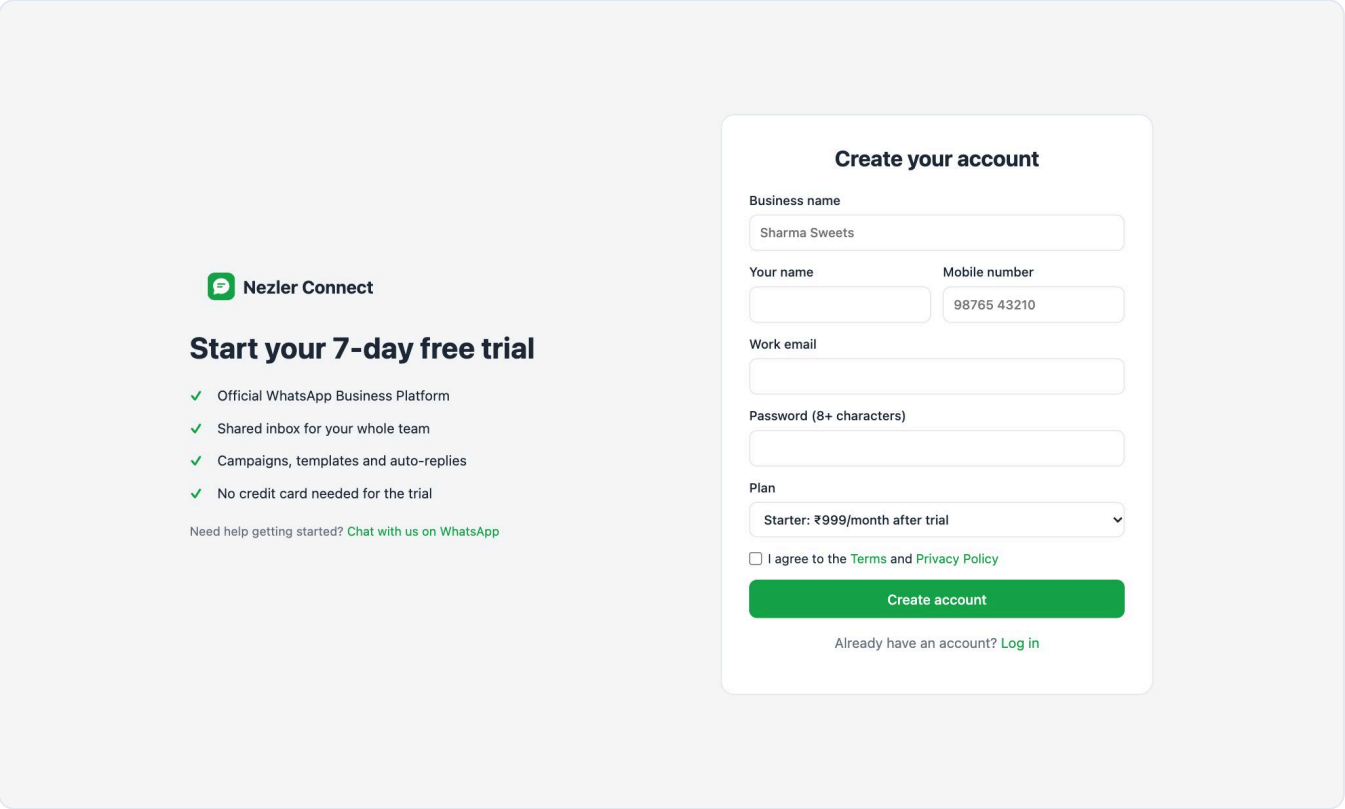
Create your account and log in

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.nezlertech.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**.



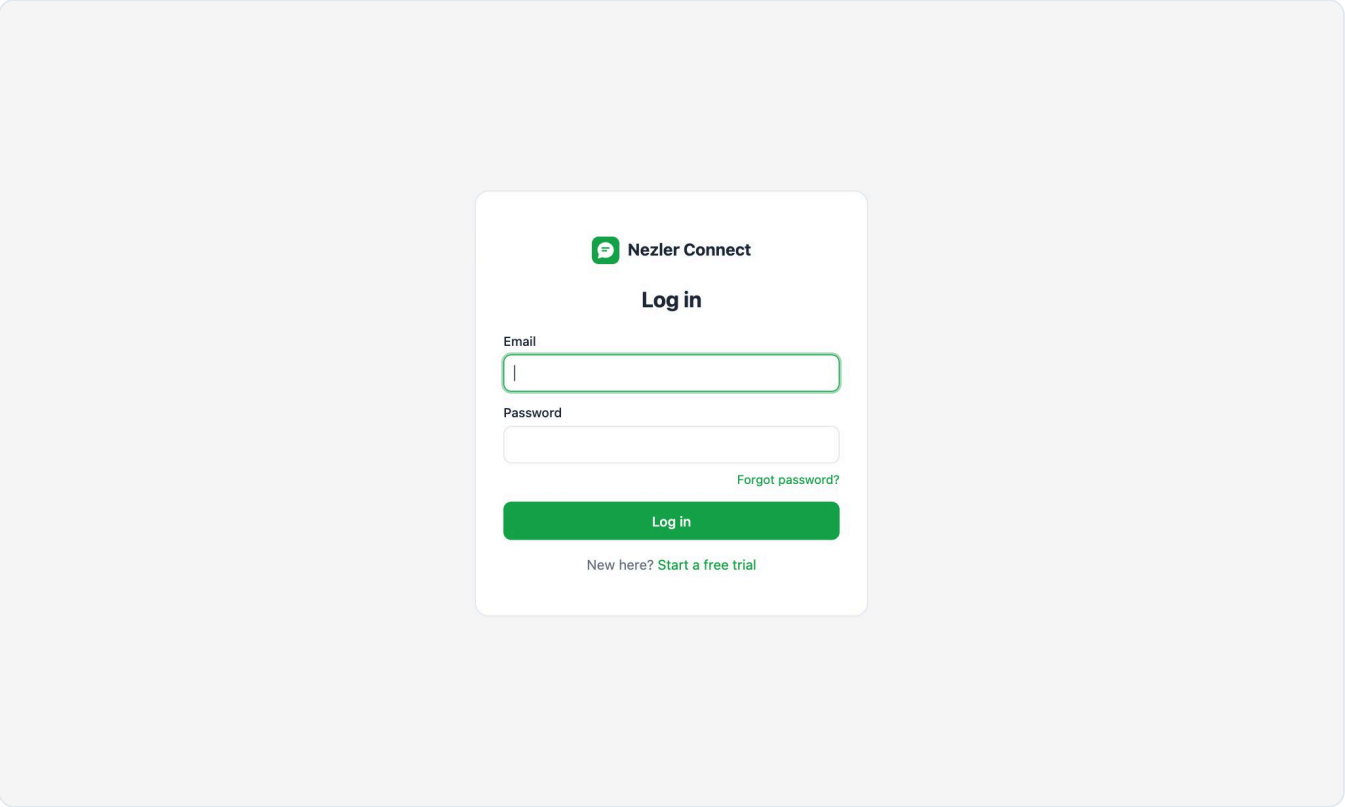
The sign-up page

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.nezlertech.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.

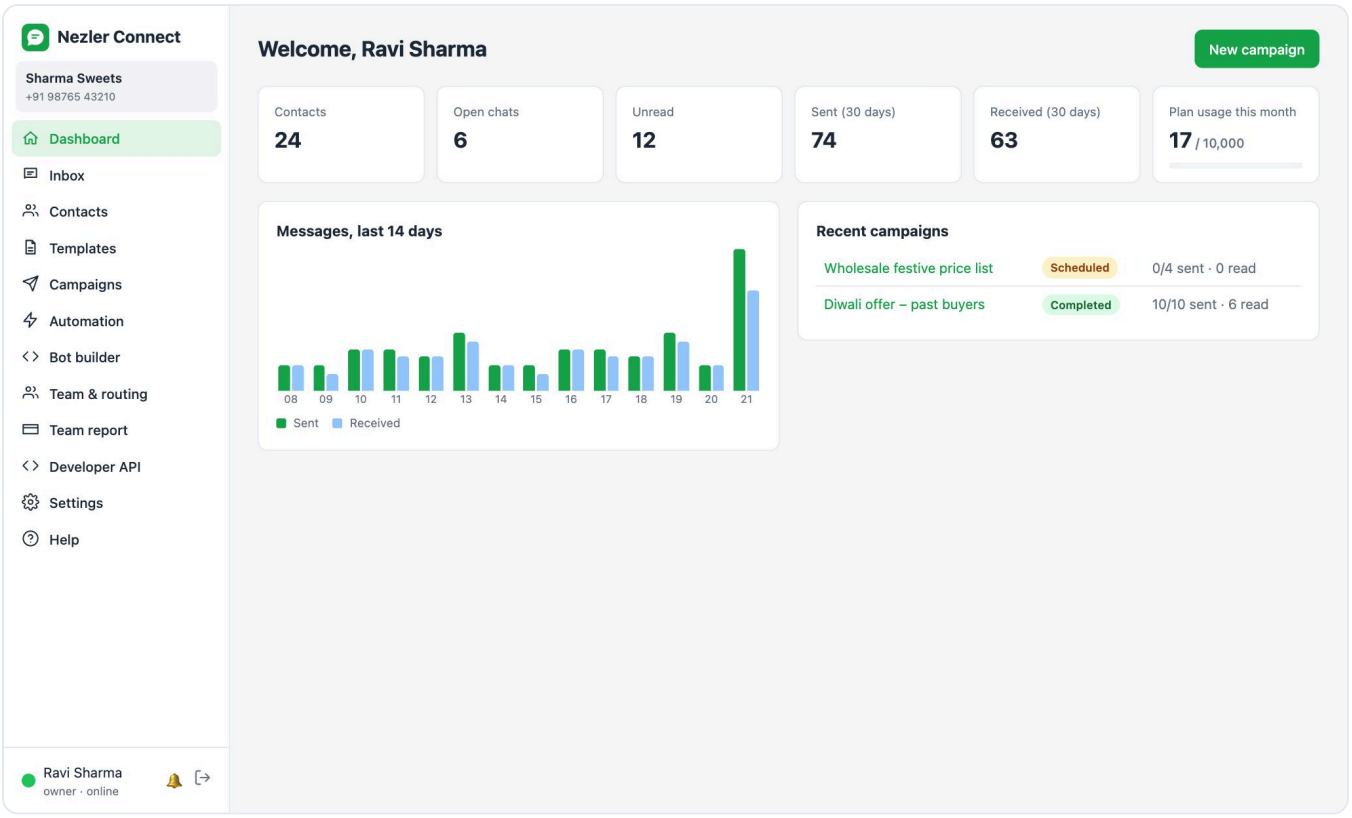


The login page

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

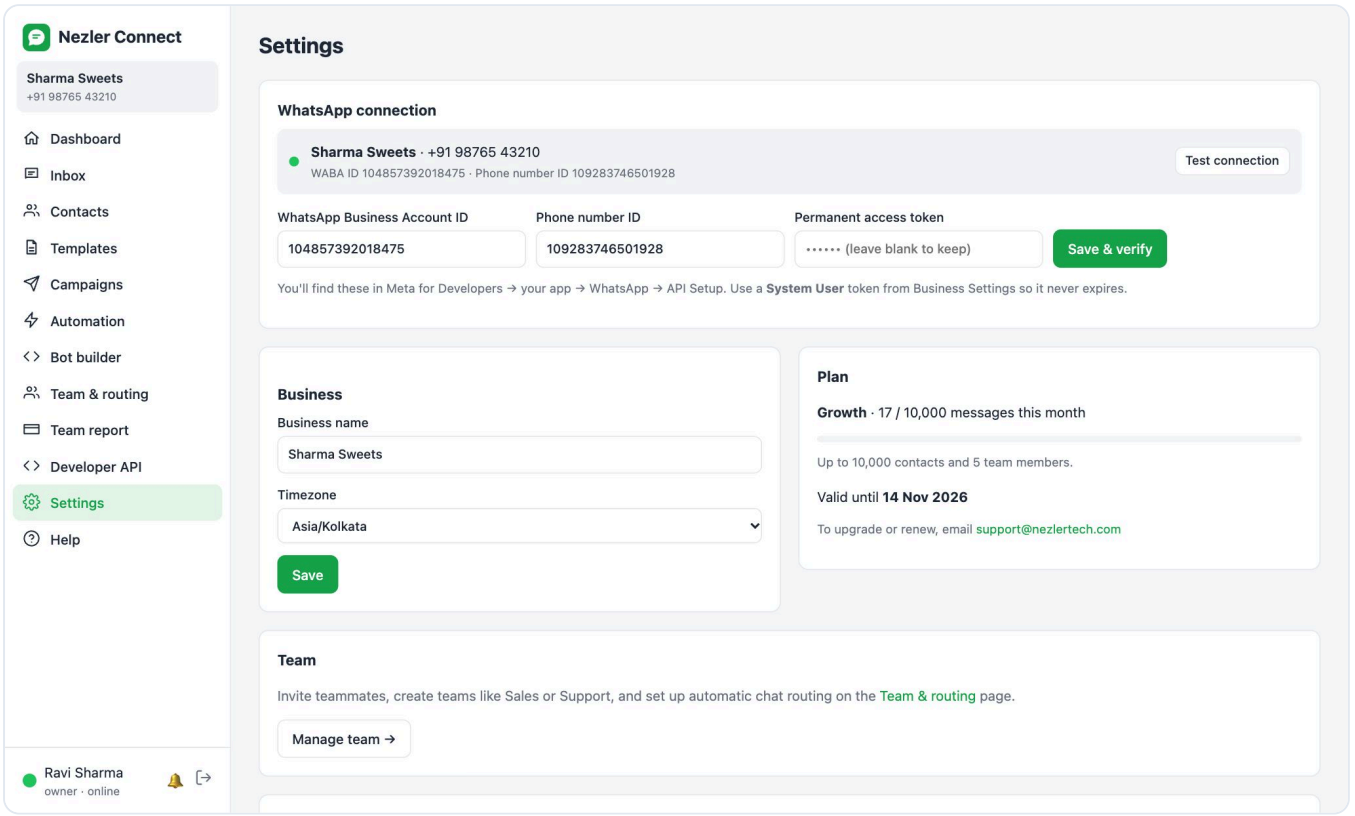
1. Connect your WhatsApp number (skip this if the Nezler team did it for you).
2. Add or import your contacts.
3. Create your first template and wait for Meta's approval.
4. Invite your team.
5. Turn on a welcome message so no customer waits.

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**.



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.

GETTING STARTED

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:

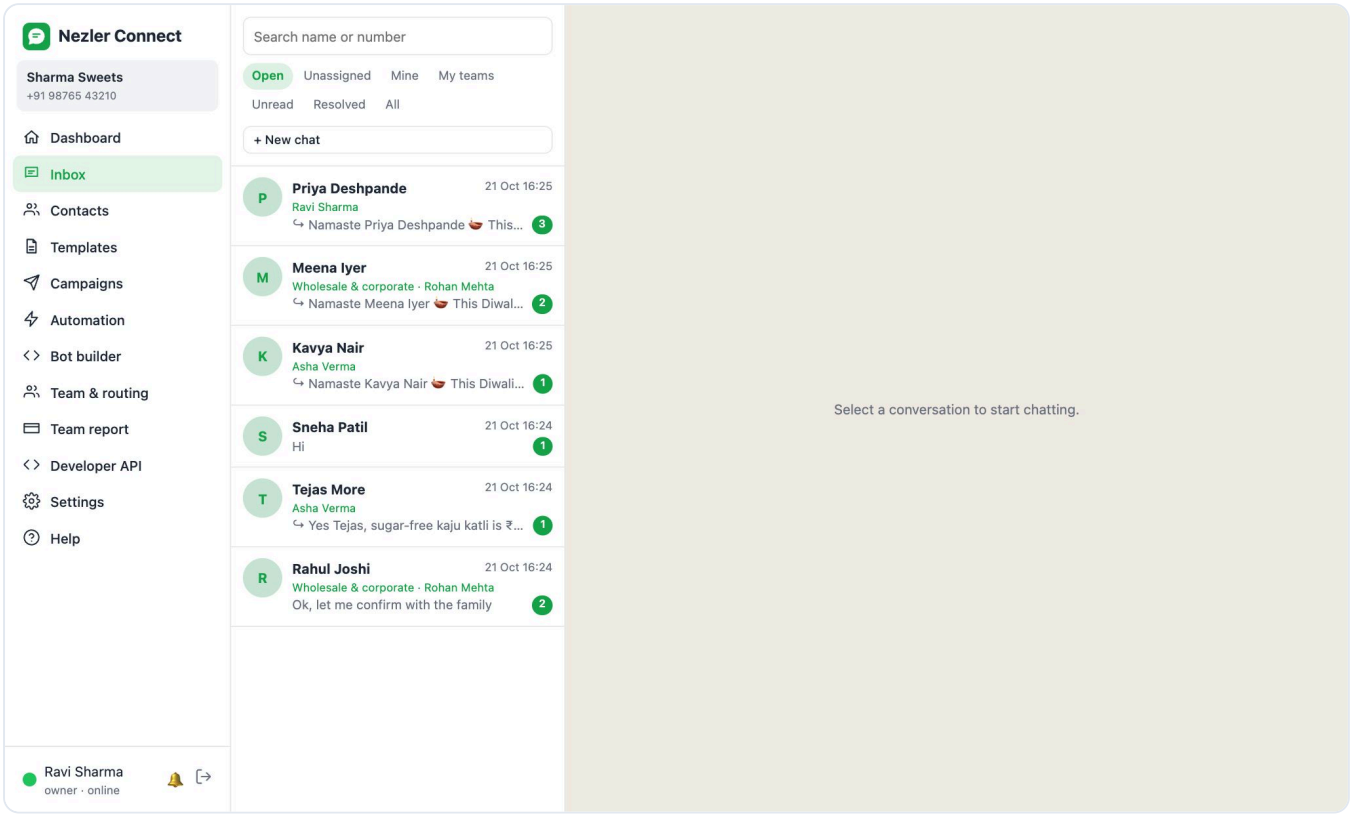
- message only people who gave you their number and expect to hear from you
- keep campaigns relevant and not too frequent
- always offer a way to opt out, for example "Reply STOP to unsubscribe"

INBOX

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.



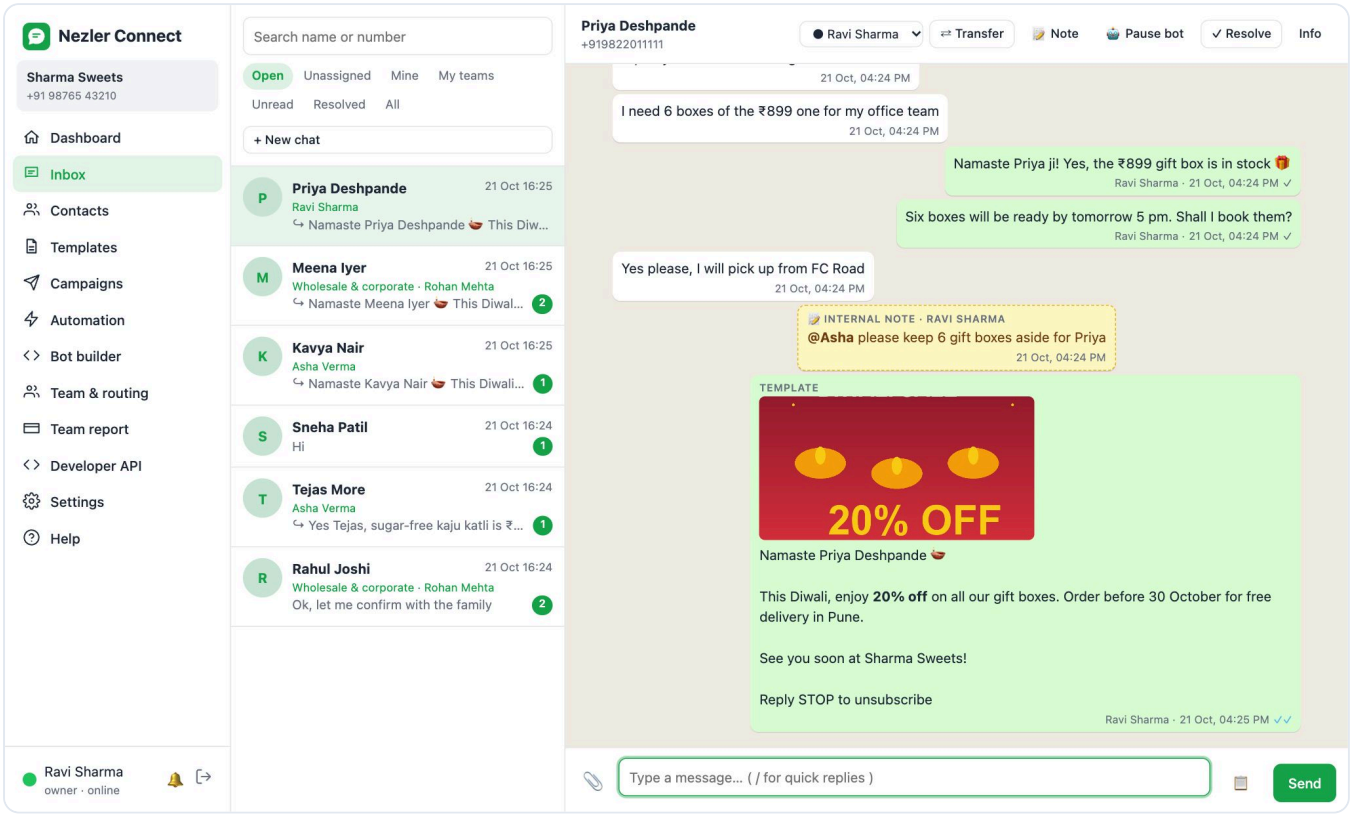
The Inbox

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.



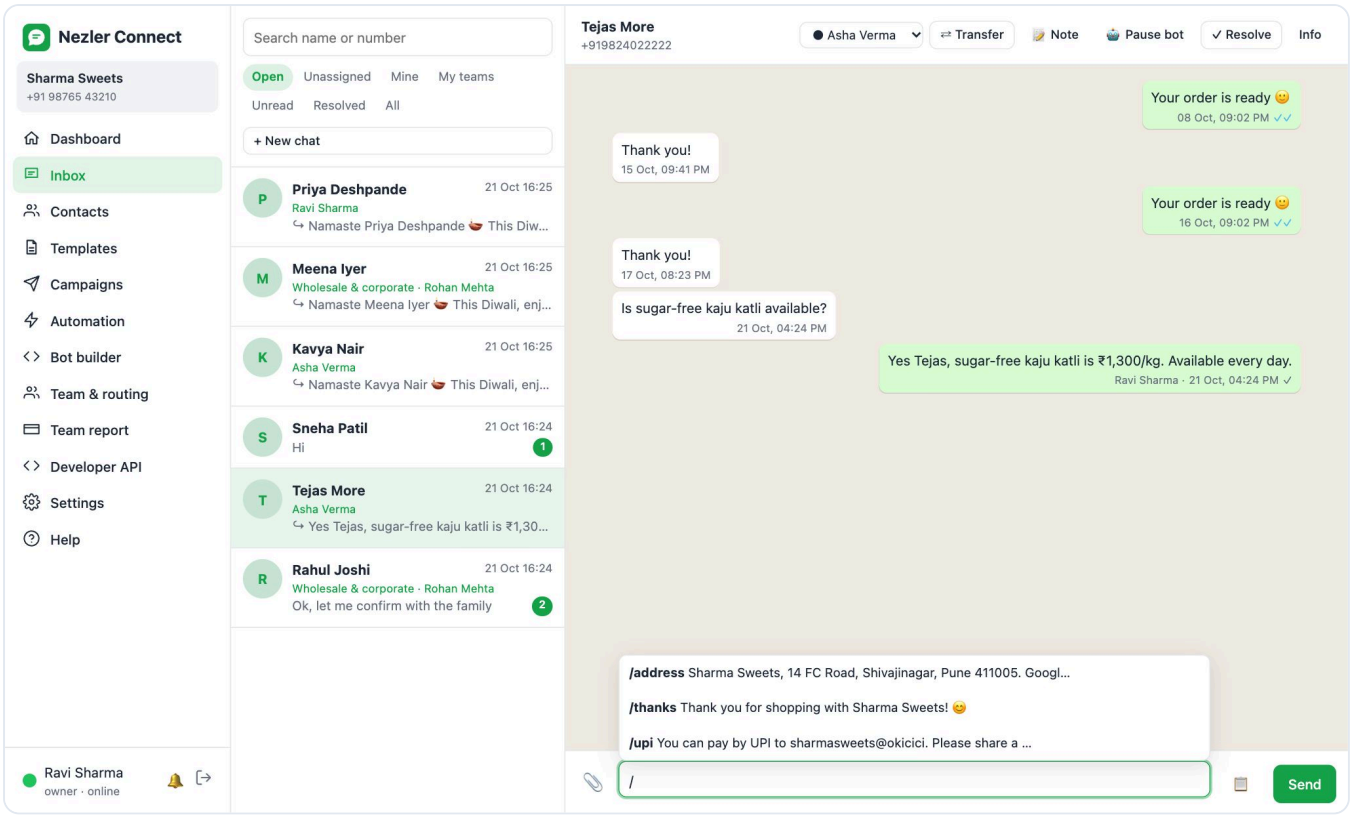
An open chat

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**.

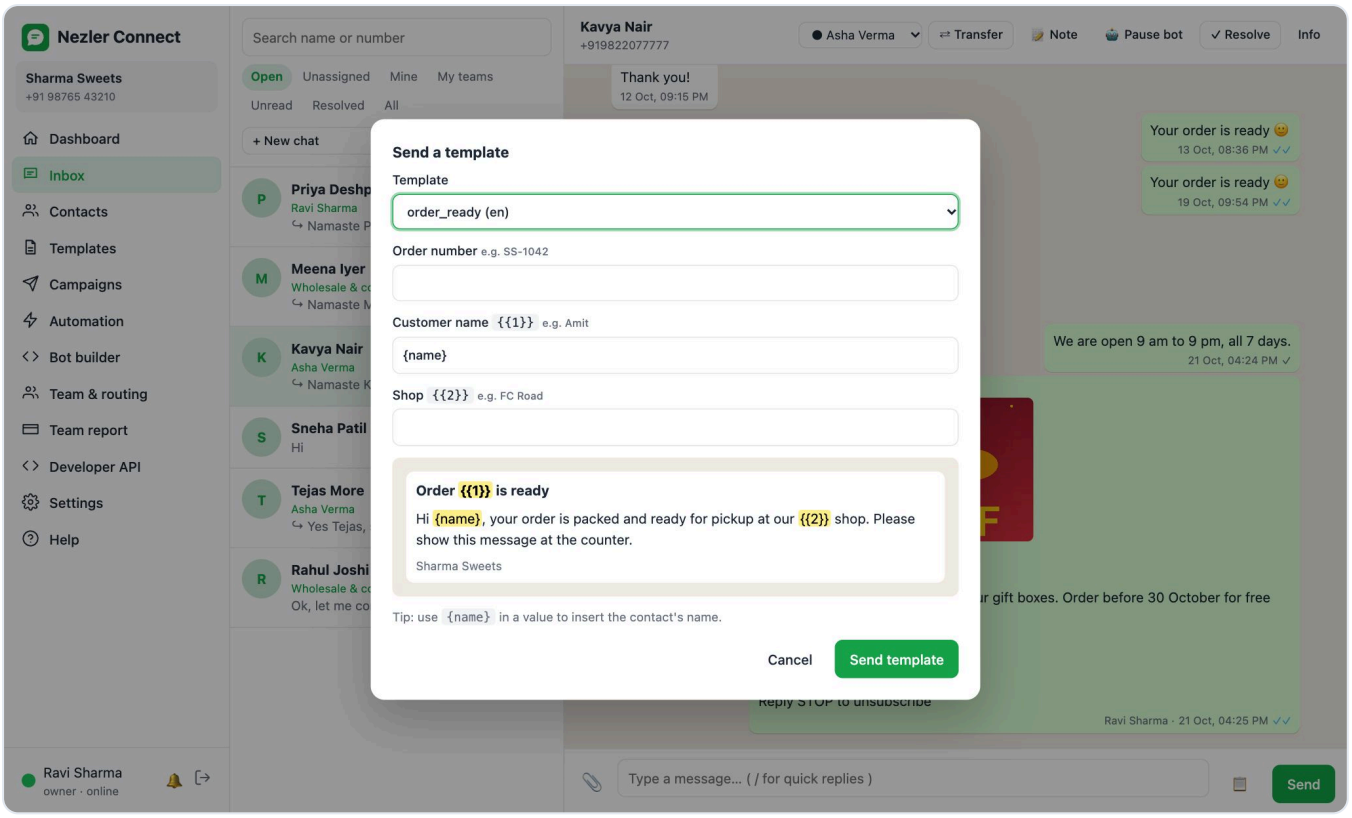


Quick replies appear when you type /

Send a template

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

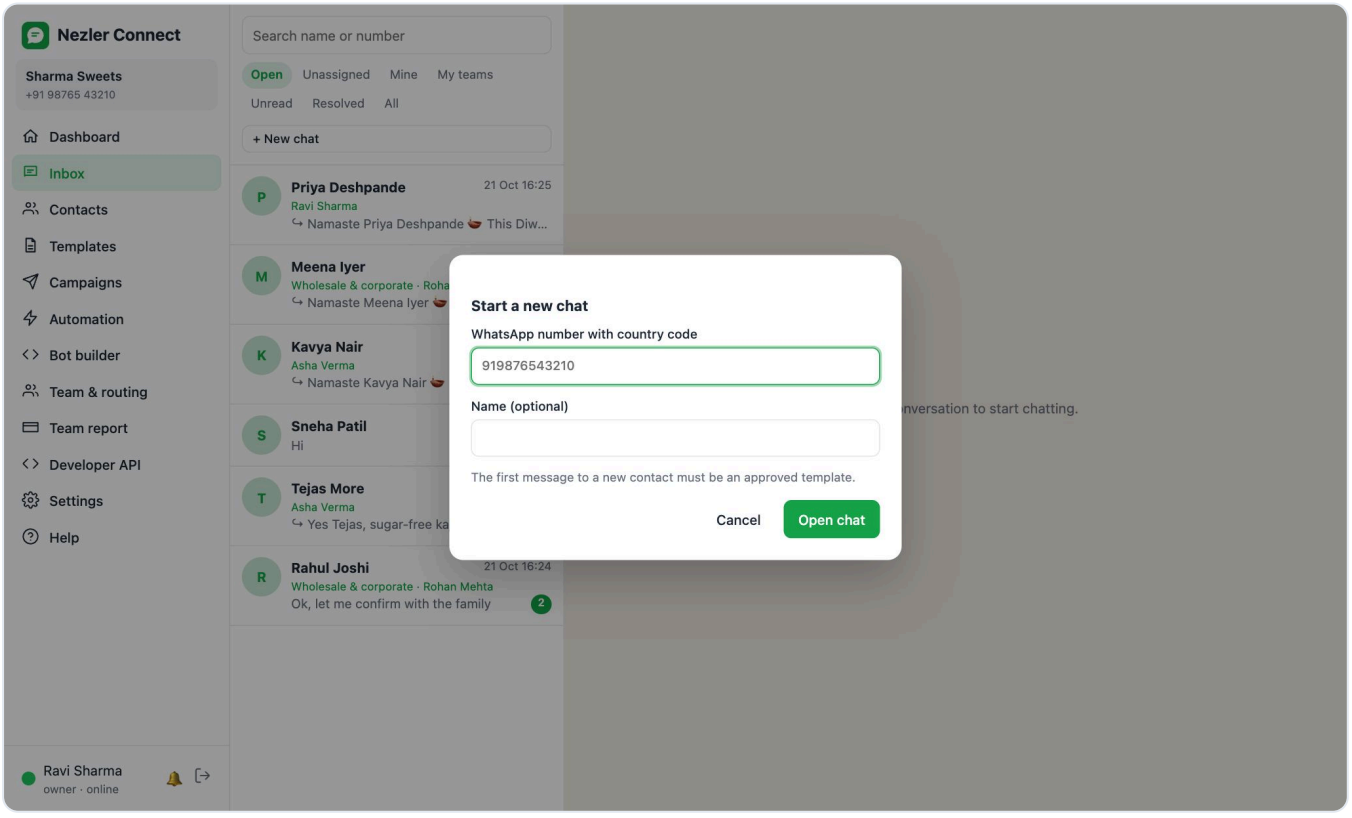
1. Choose the template.
2. Fill in its blanks. Type `{name}` to use the customer's name automatically.
3. Check the preview and click **Send template**.



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.

INBOX

Assign, transfer and add notes

Share chats with your team without the customer noticing.

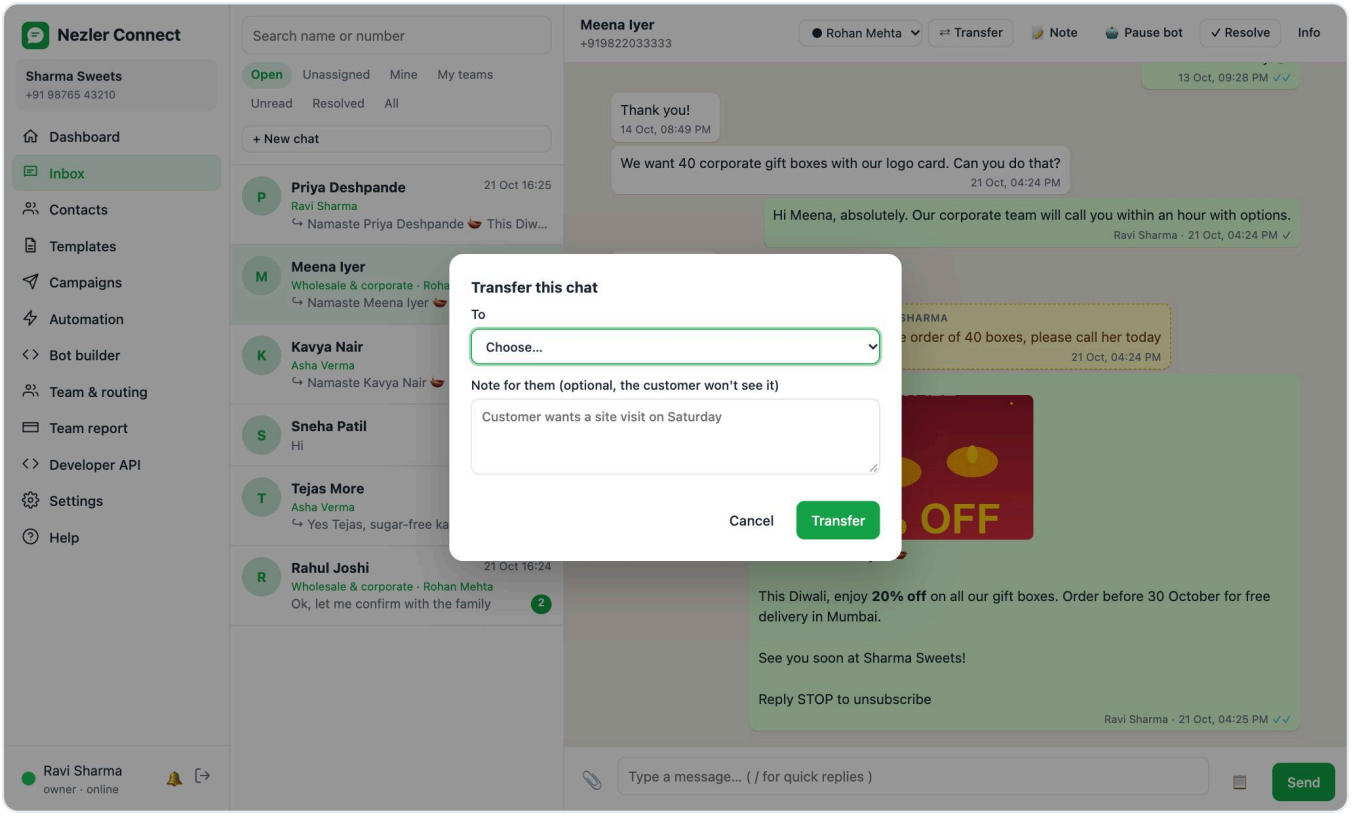
When several people share one WhatsApp number, these tools keep everyone in sync. The customer never sees any of them.

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

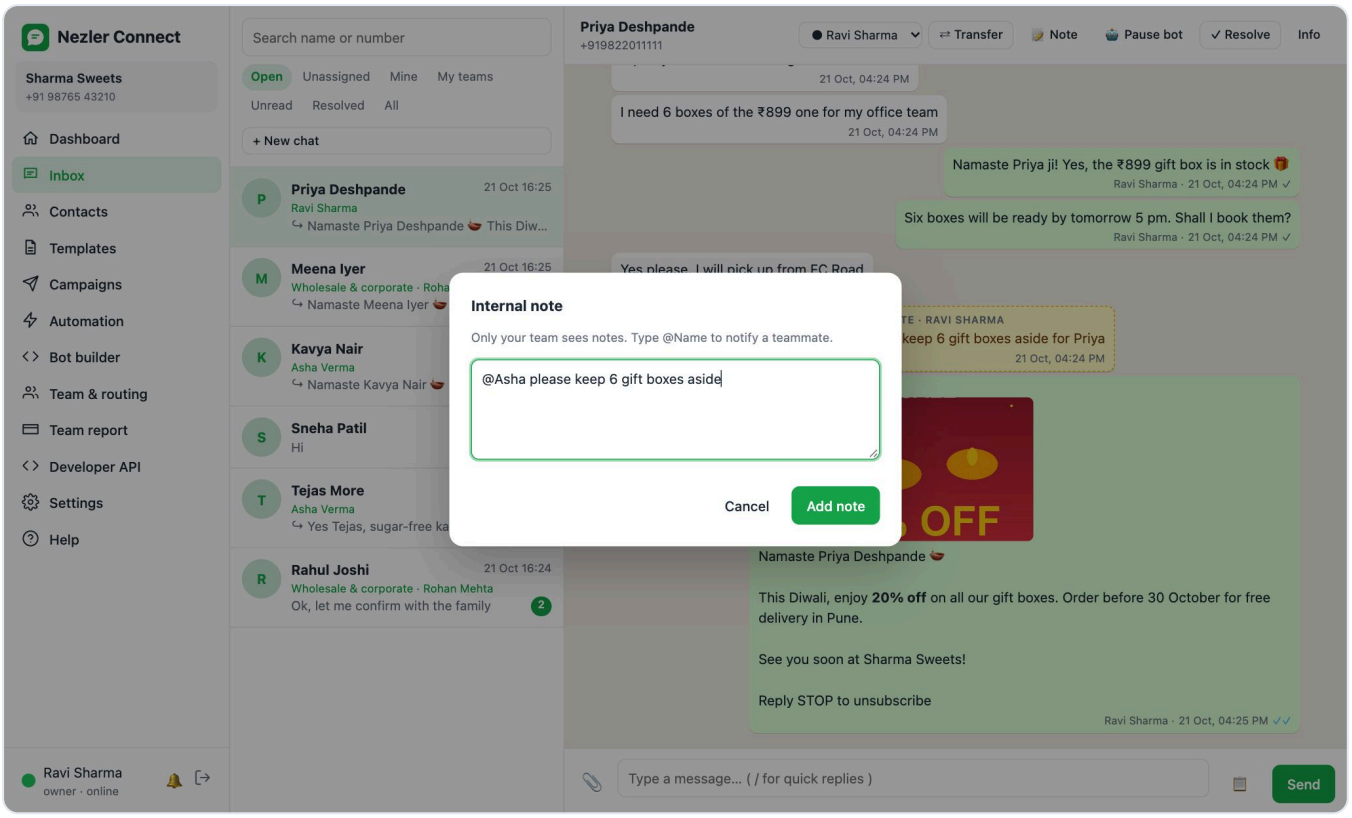
1. Click **Transfer**.
2. Choose a teammate or a whole team.
3. Optionally add a note, for example "Wants a quote for 40 gift boxes, please call today".
4. Click **Transfer**.



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.

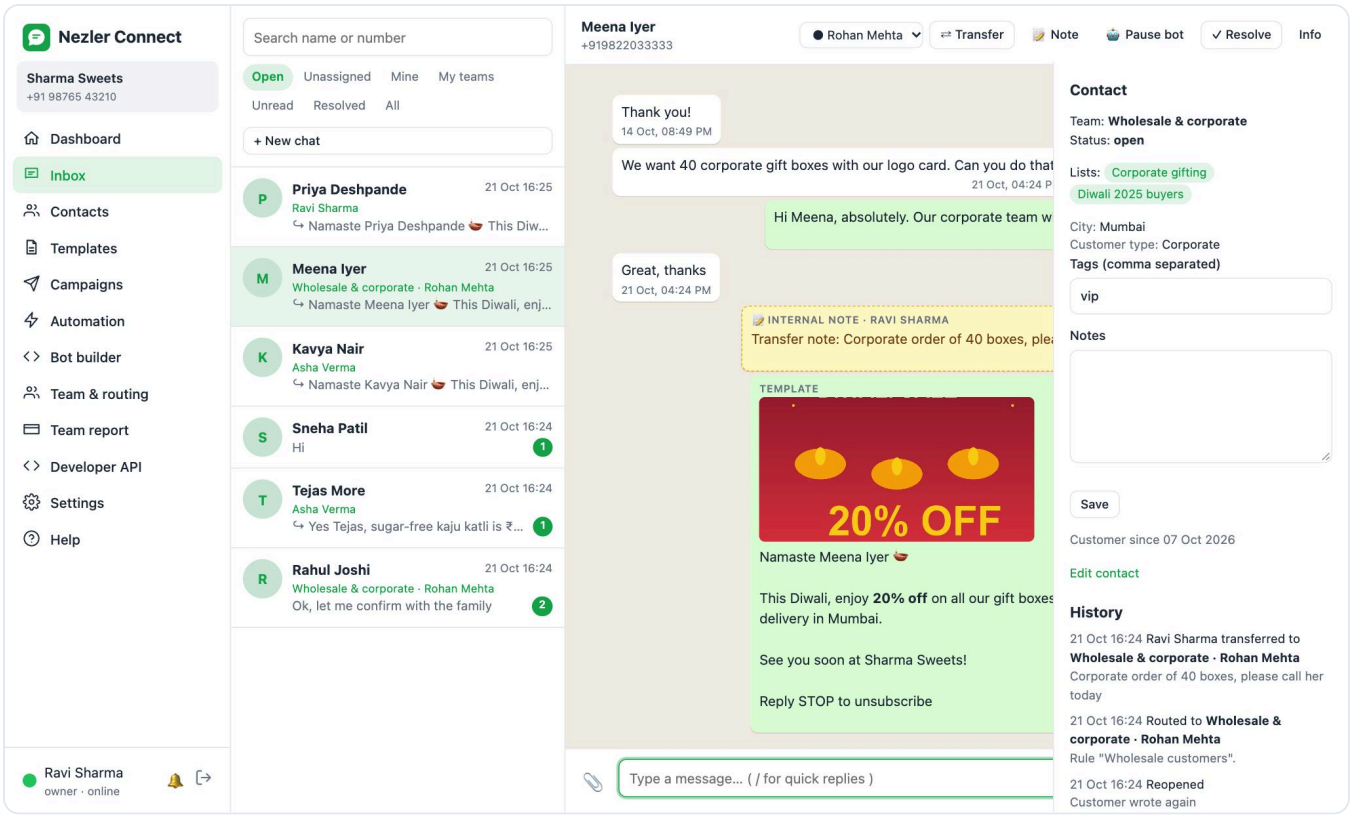


Adding an internal note

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



The contact panel

Pause the bot

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.

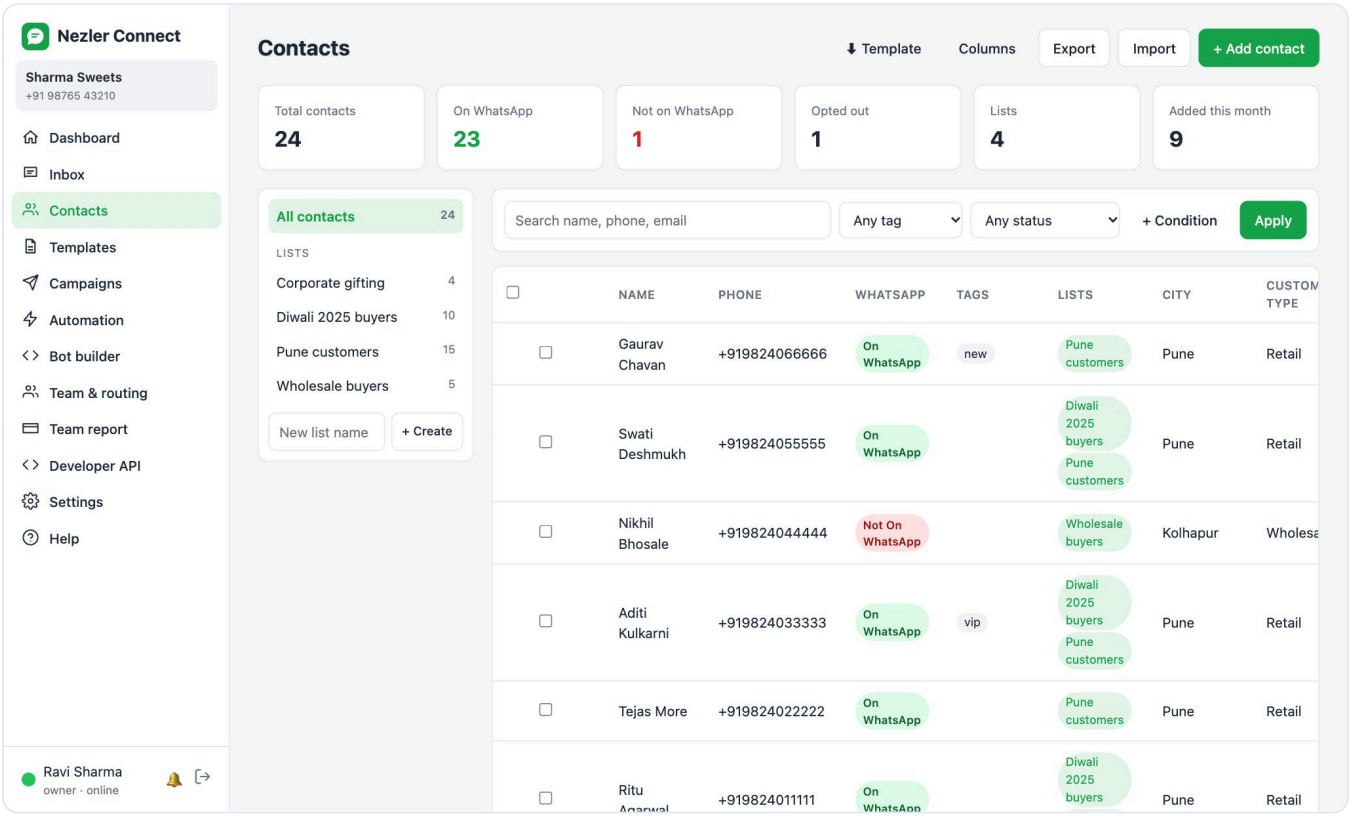
> **Tip** Managers and owners see all chats. Agents see their own chats and the queues of their teams. See Add team members and roles.

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.



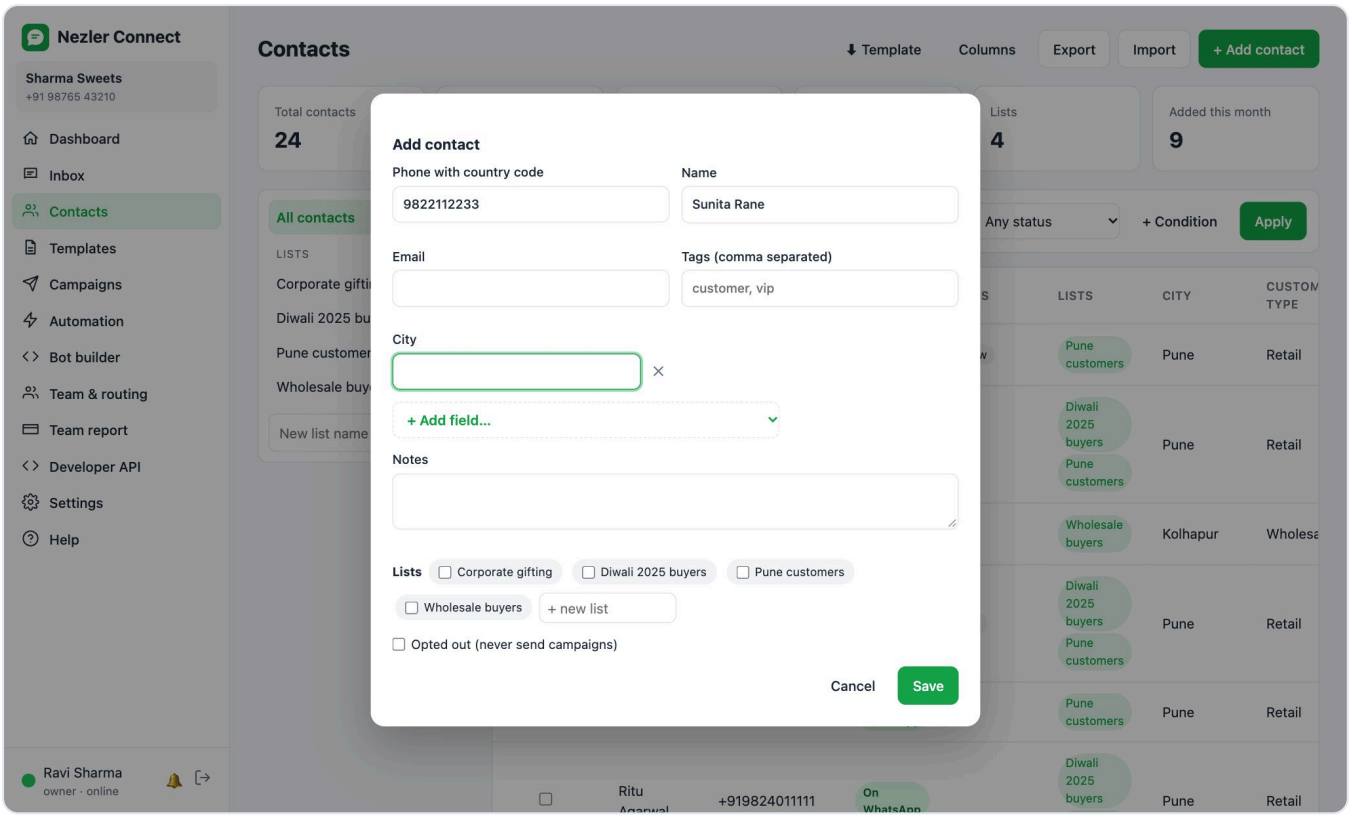
The Contacts page

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.

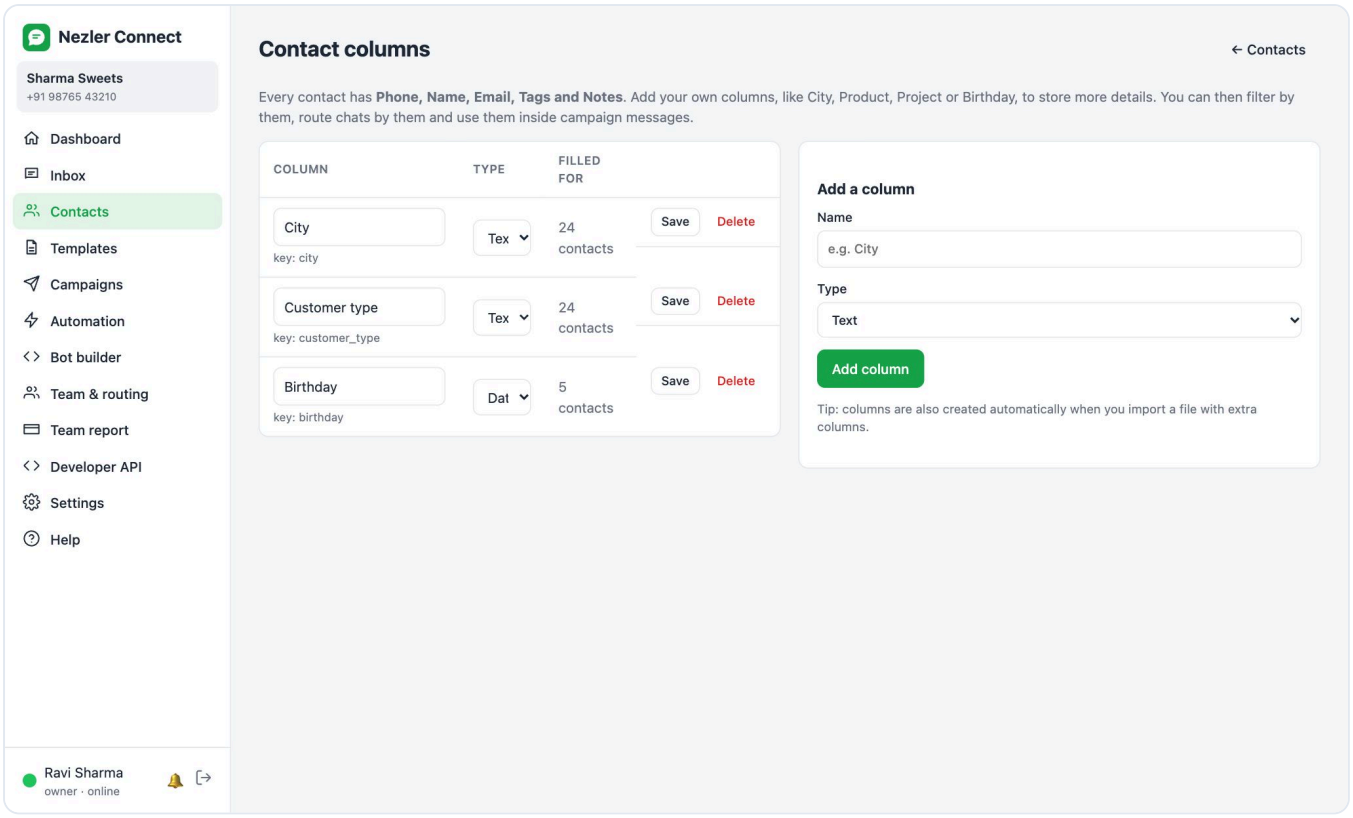
> **Tip** Tick **Opted out** if someone asks not to receive offers. They'll never be included in a campaign, but you can still reply when they message you.

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.



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

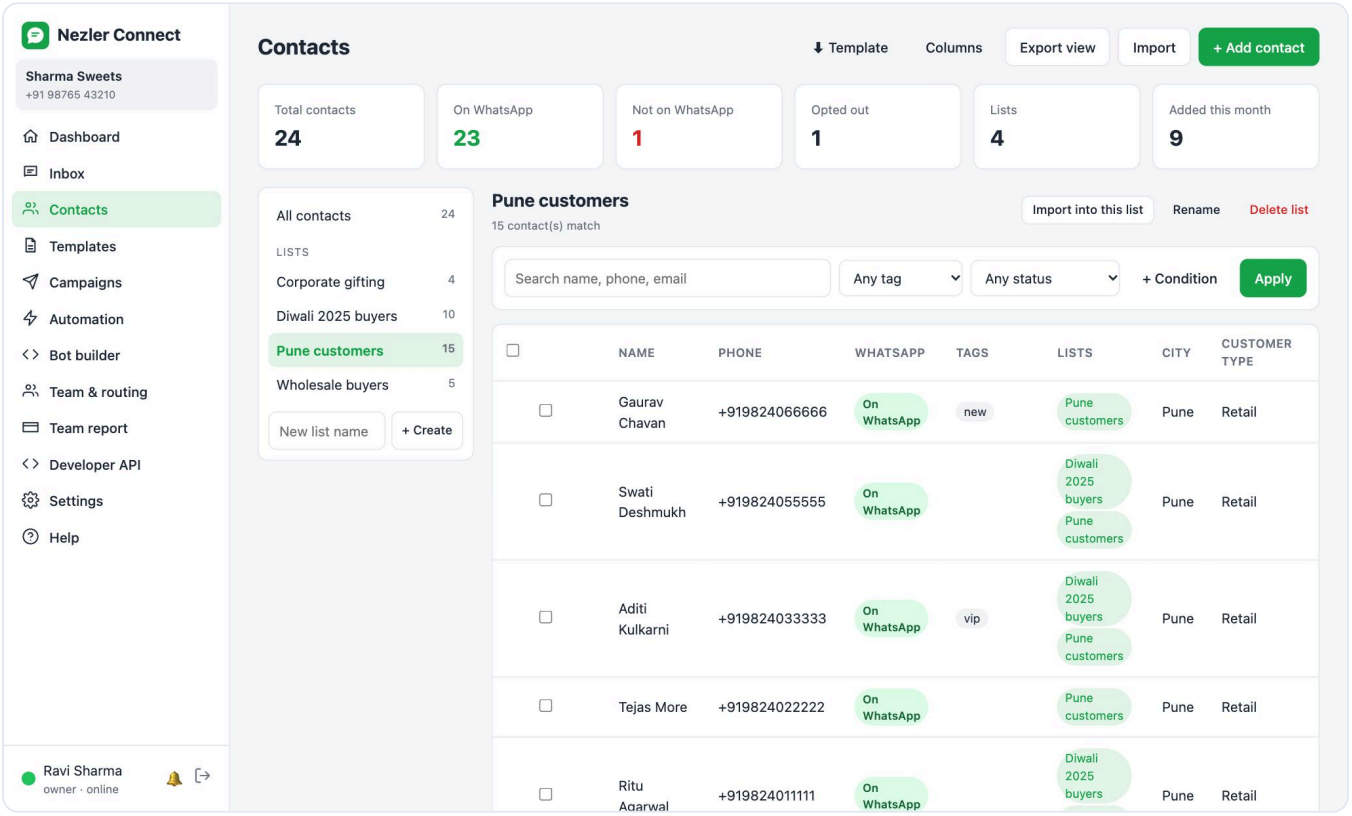
Lists, filters and bulk actions

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.

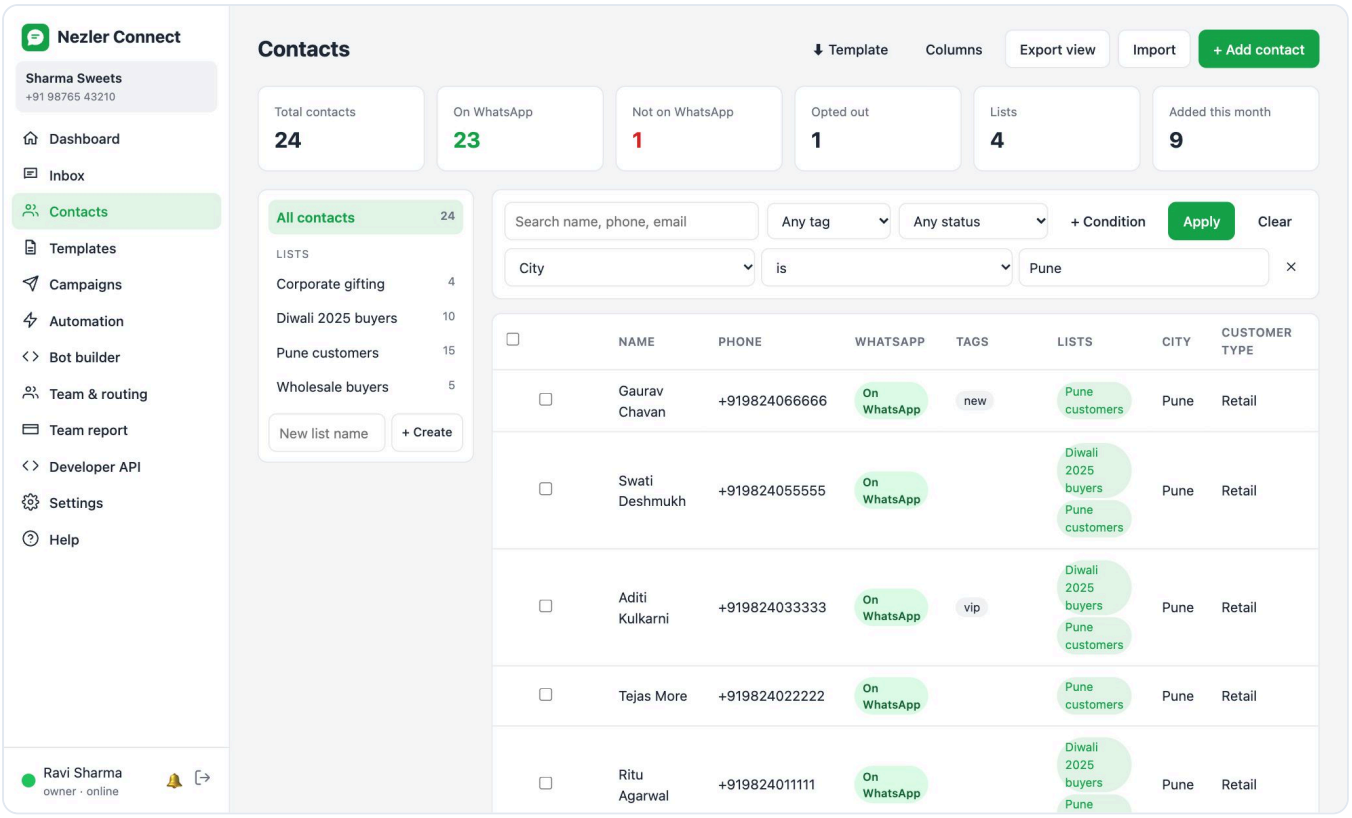
- **Create a list**: type a name in the box under your lists, on the left of the Contacts page, and click **+ Create**.
- **Open a list**: click it to see only its contacts. From there you can **Import into this list**, **Rename** it or **Delete list**. Deleting a list keeps the contacts.
- **Add people 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.



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**.

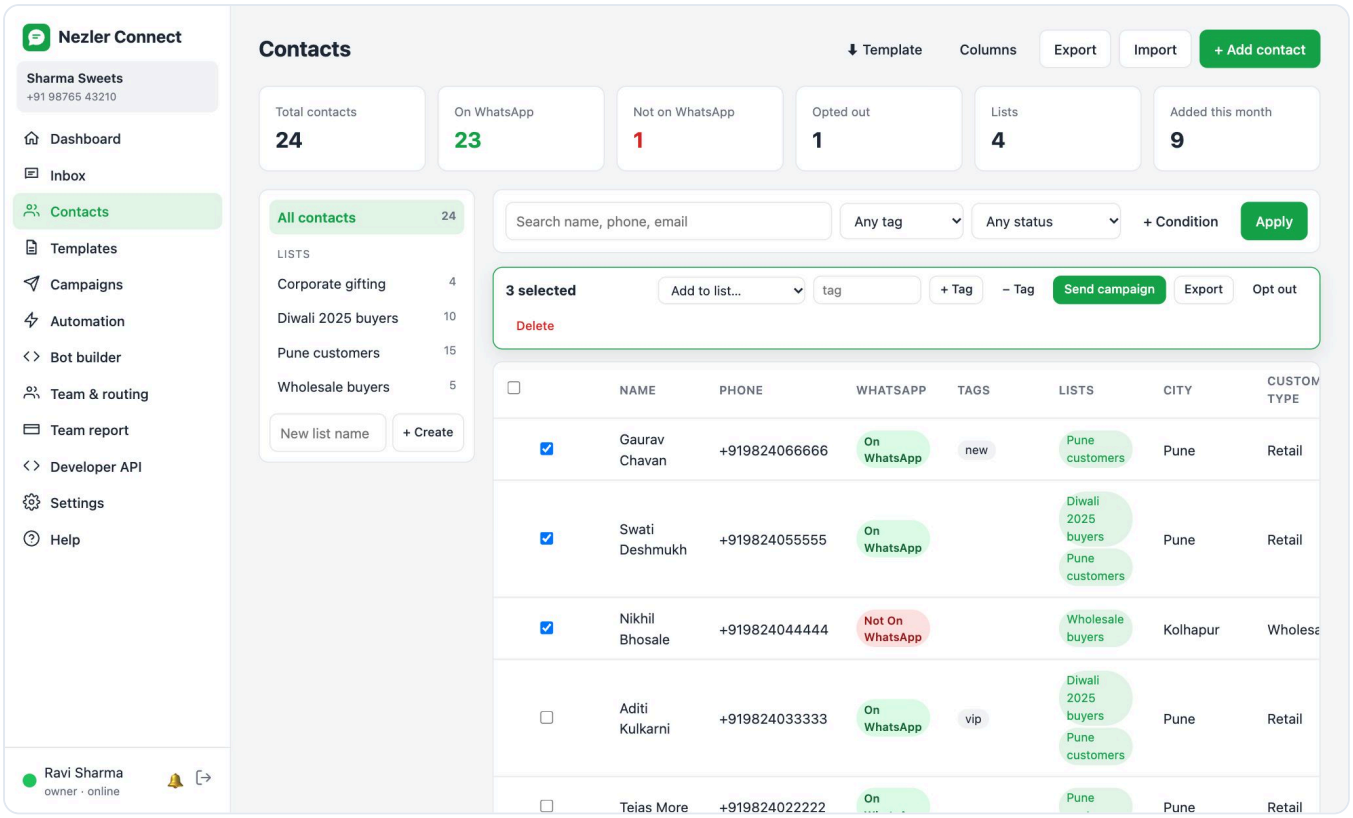


Filtering contacts by City

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**



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**.

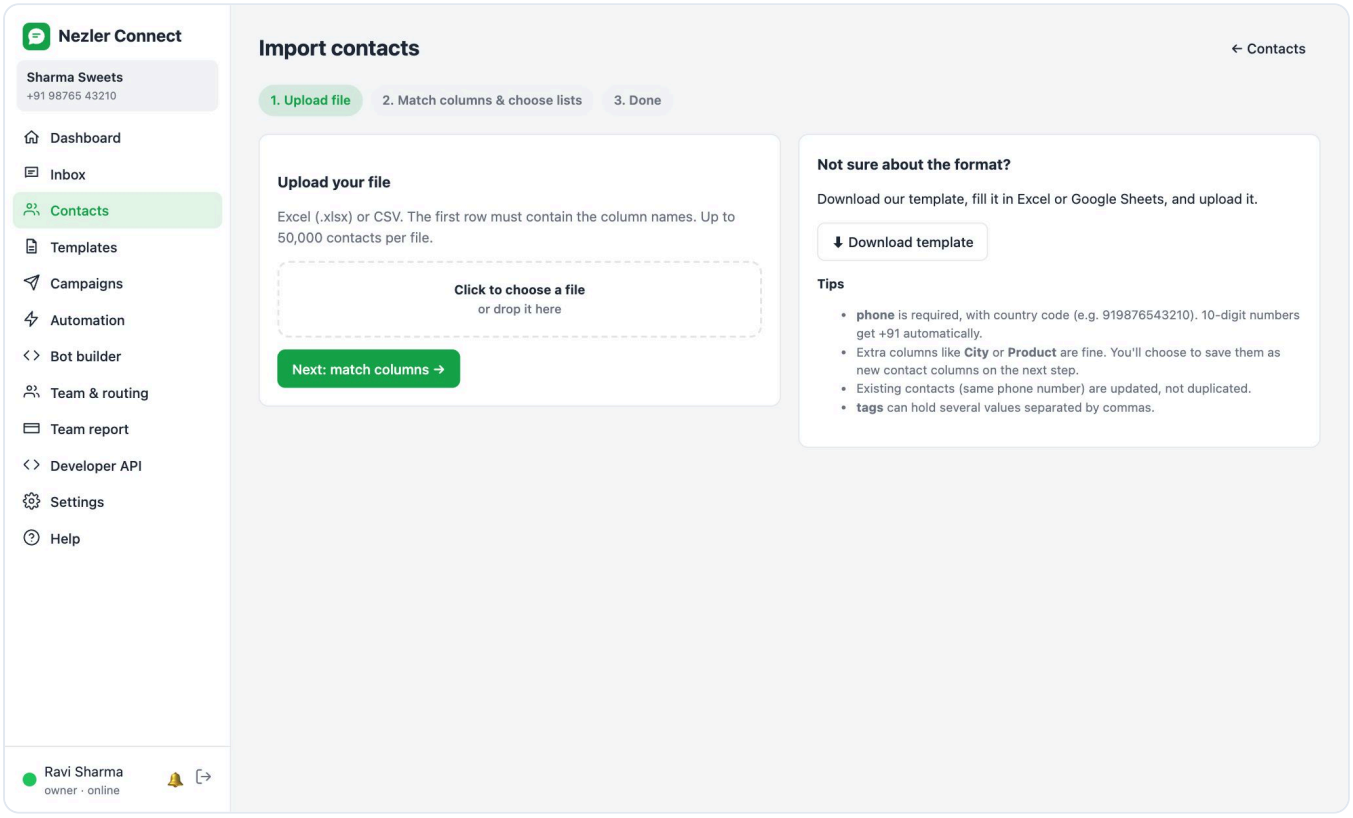
CONTACTS

Import from Excel and export

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

Import contacts from Excel or CSV

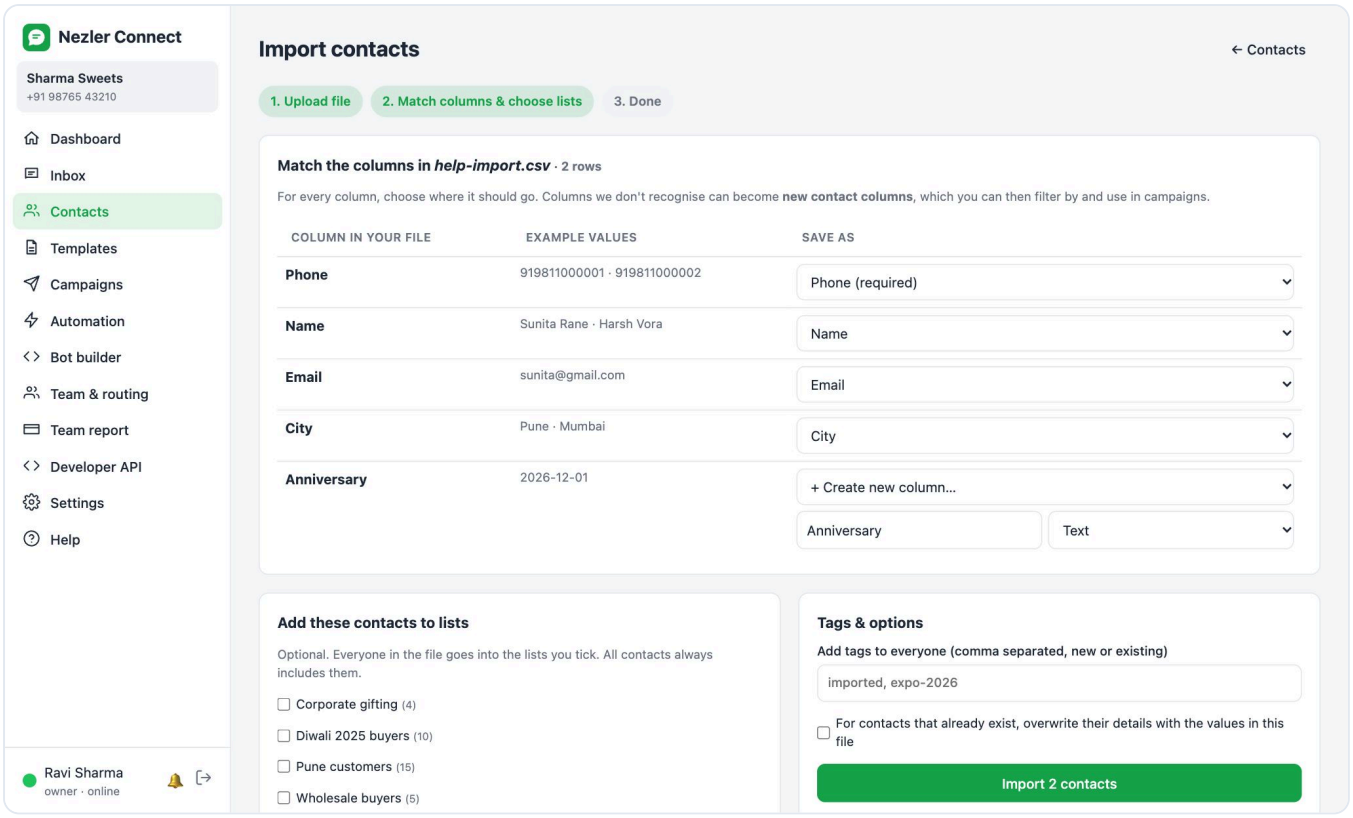
1. On the Contacts page, click **Import**.
2. Not sure about the format? Click **Download template**. It has the right column names and a sample row. Fill it in with Excel or Google Sheets.
3. Click the upload box, choose your file (.xlsx or .csv, up to 50,000 contacts) and click **Next: match columns**.



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 it

   Phone 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.



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.

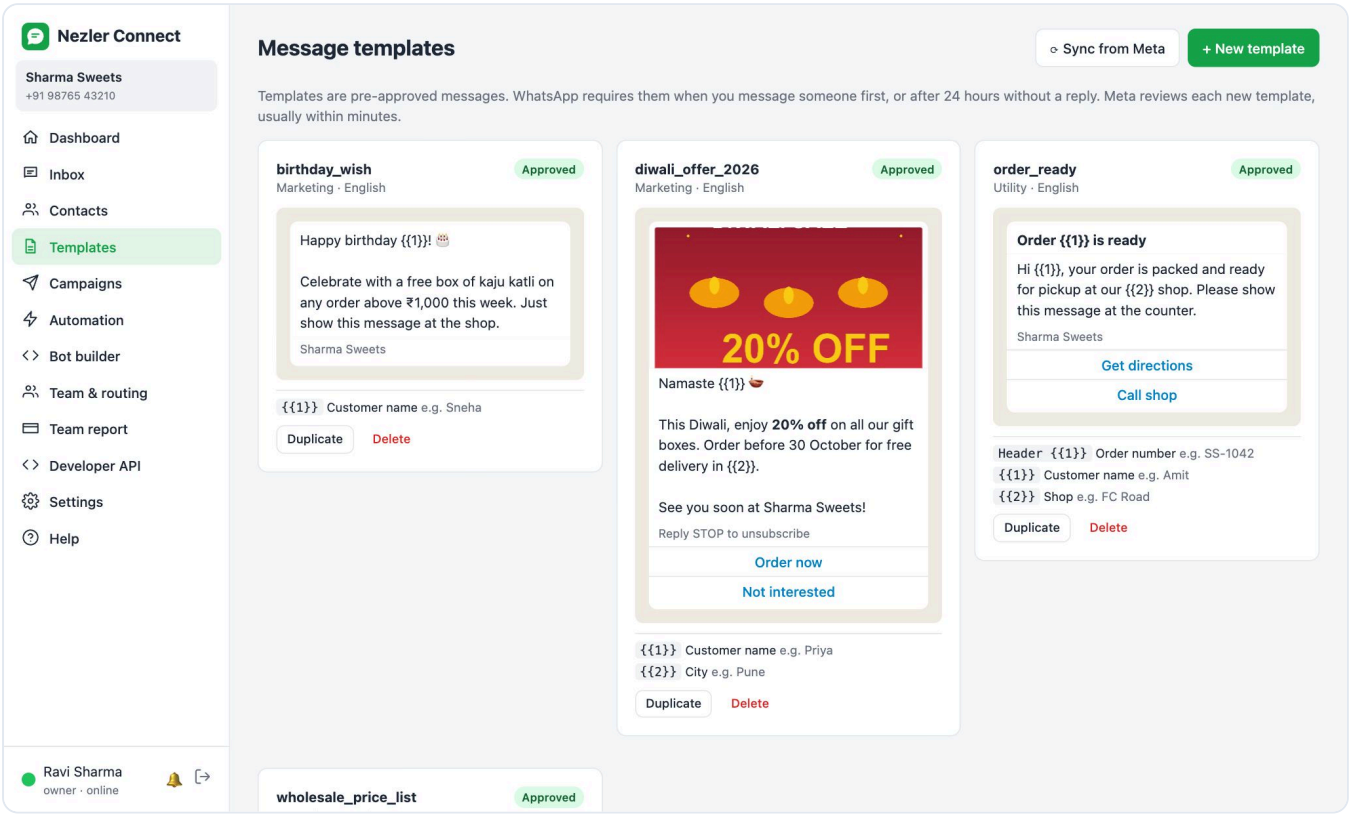
> **Important** Agents may not be allowed to export contacts. The owner decides this on the Team page.

TEMPLATES & CAMPAIGNS

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:

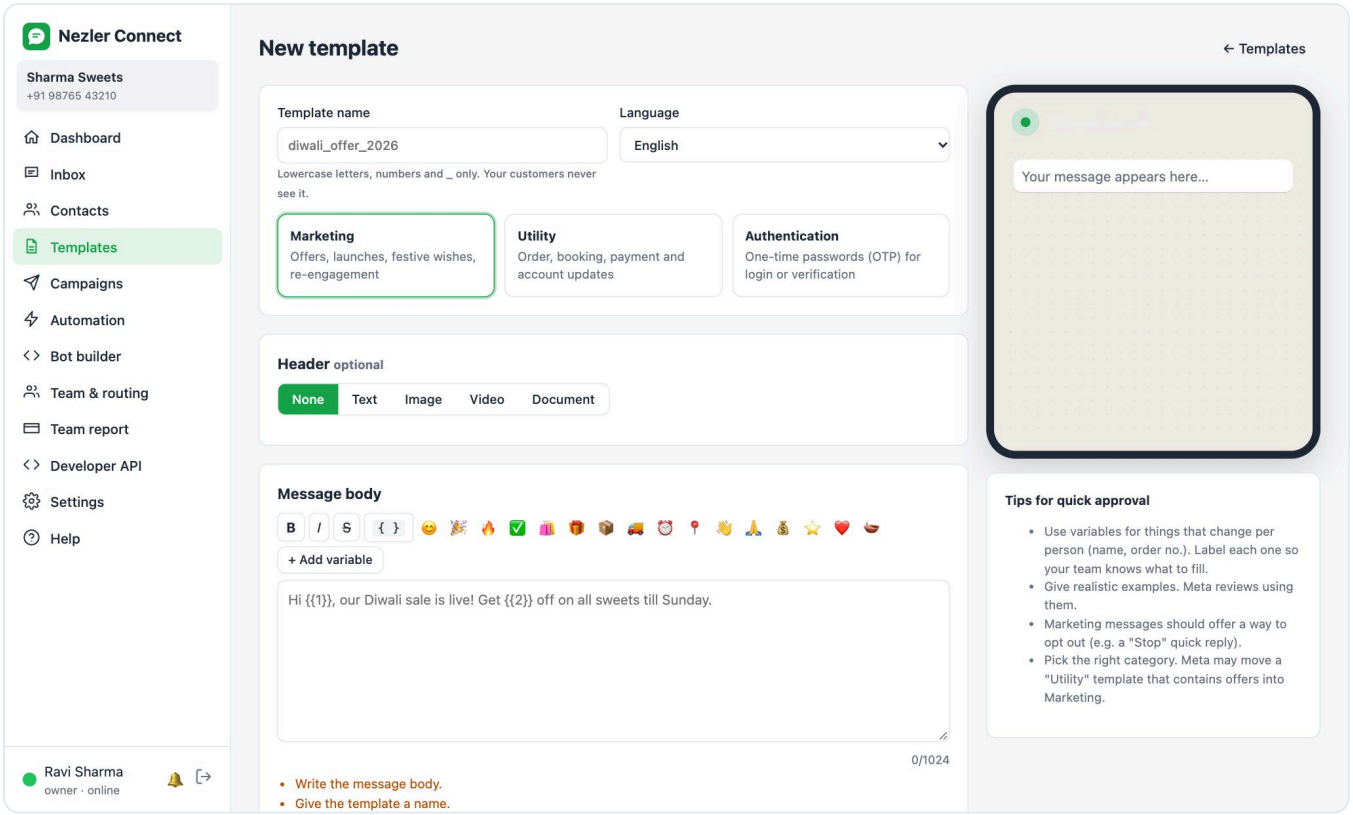
- **Approved**: ready to use
- **Pending**: Meta is reviewing it, usually for a few minutes
- **Rejected**: Meta refused it. The reason is shown. Click **Duplicate**, fix the wording and submit again.

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

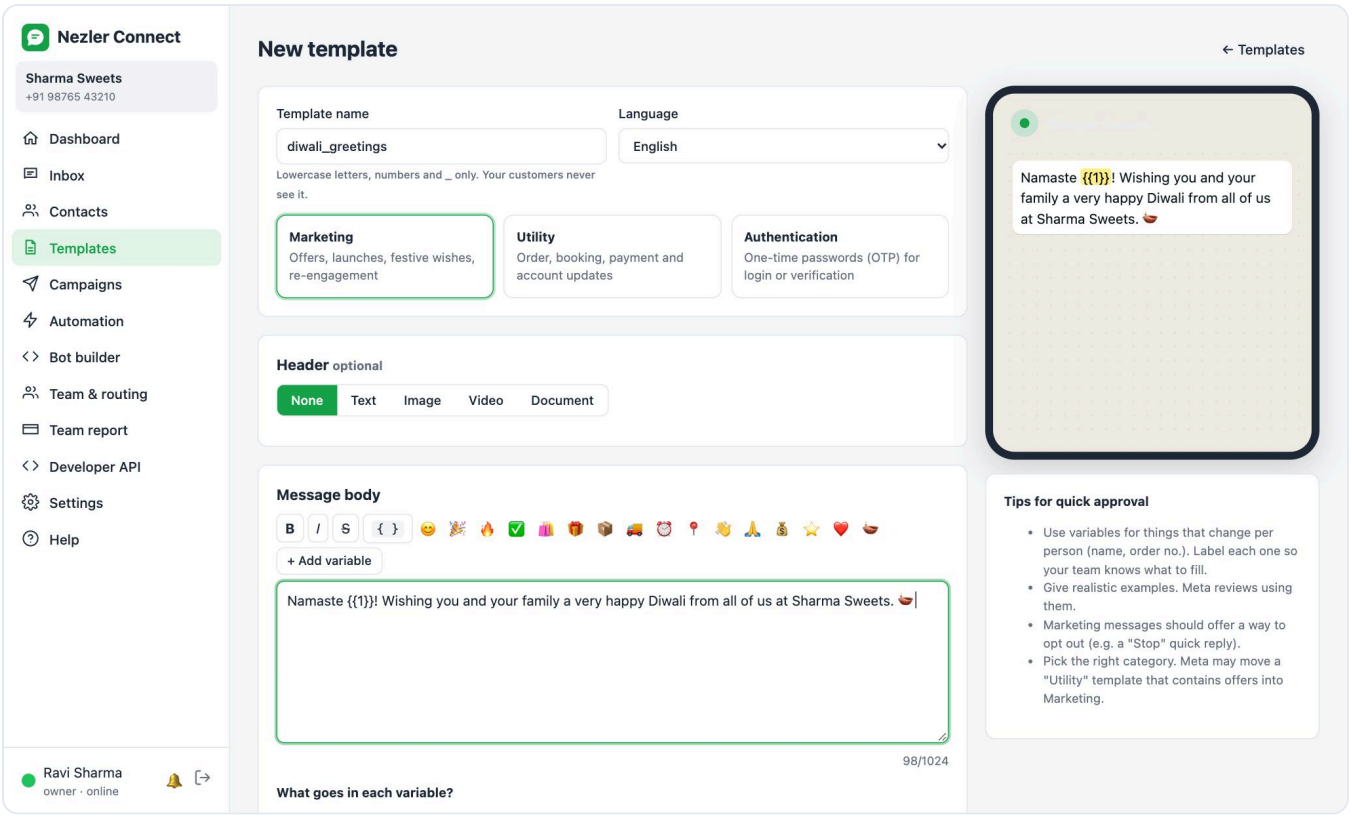
- **Authentication**: one-time passwords (OTP). Meta writes the text for you; you only choose the expiry and button.



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**.



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.

TEMPLATES & CAMPAIGNS

Send a campaign

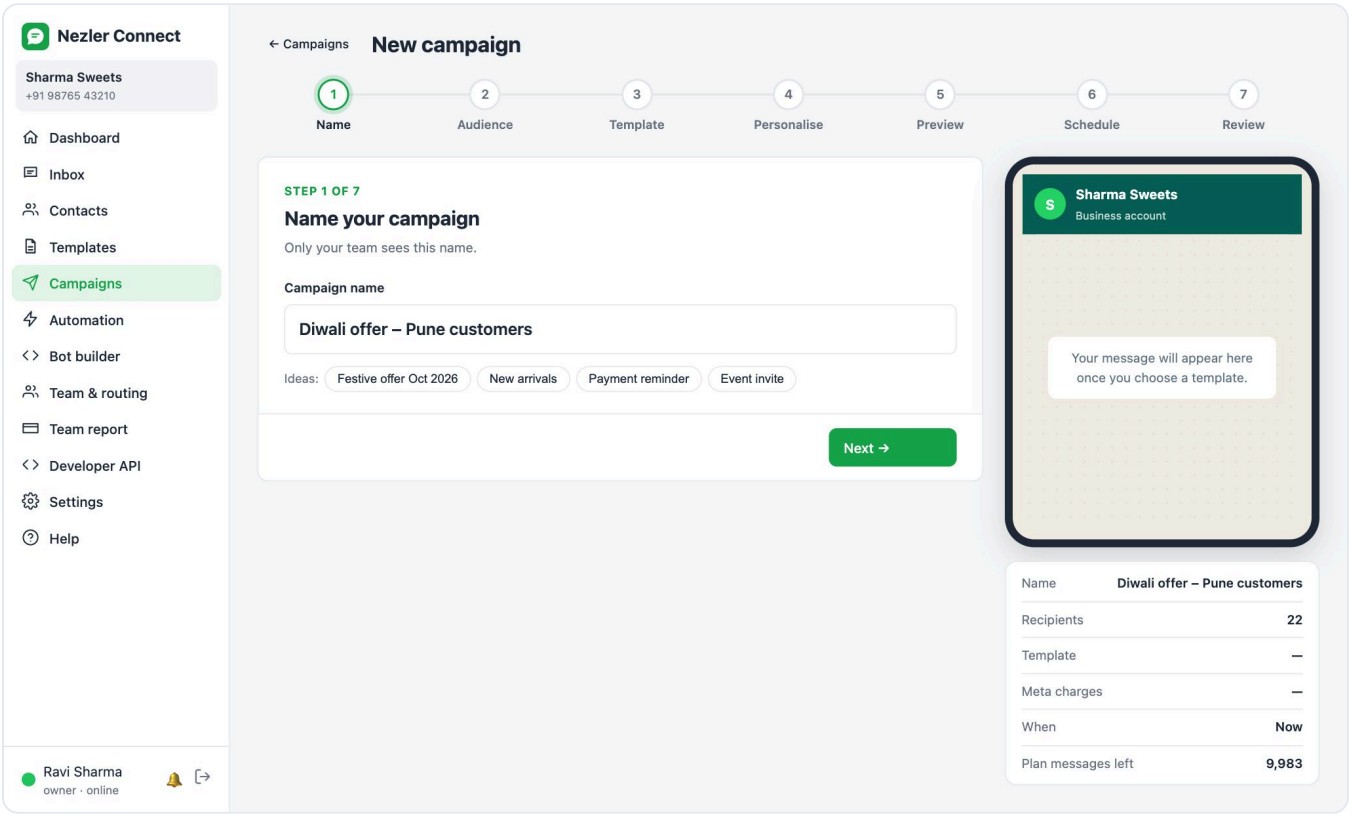
Send a template to many contacts in seven simple steps.

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.



Step 1: name the campaign

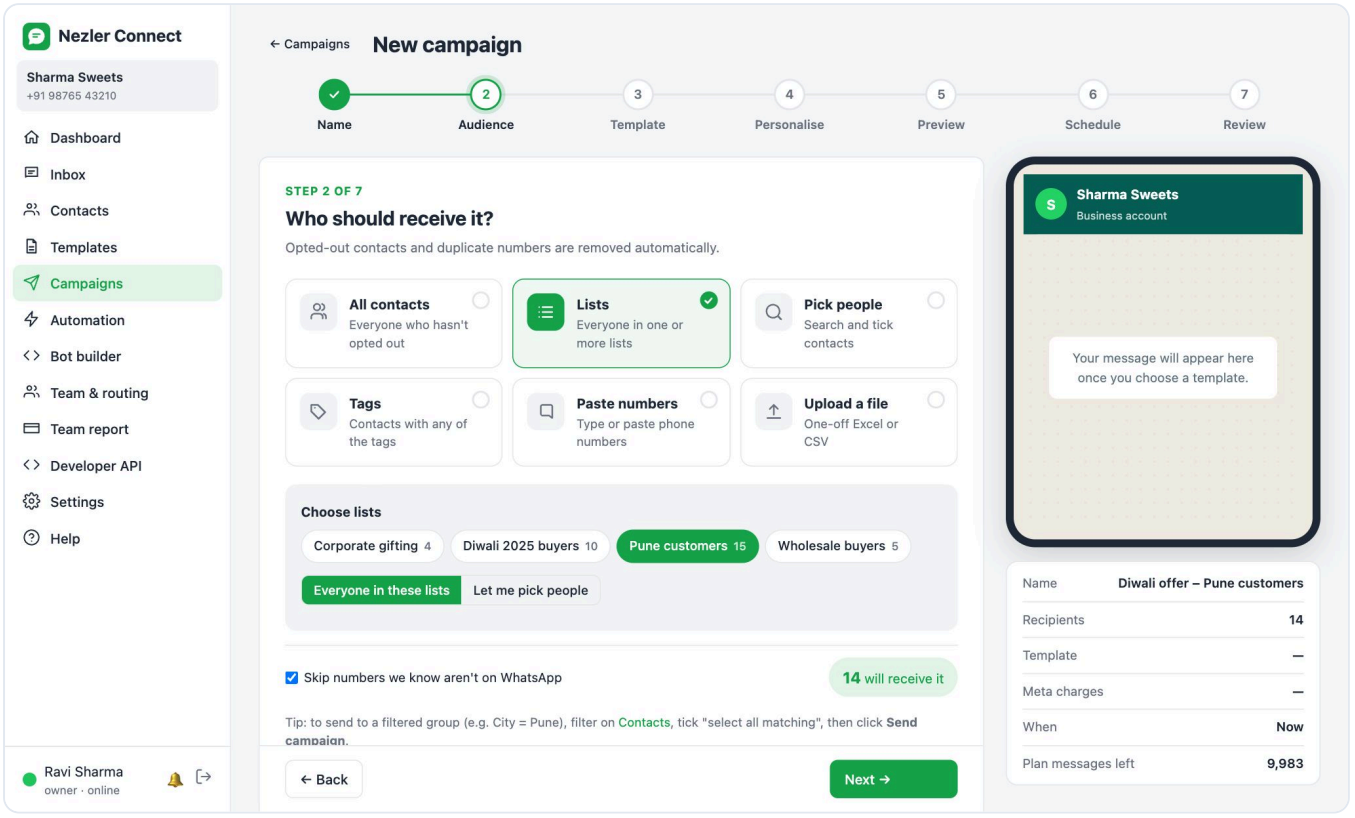
Step 2: Audience

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.

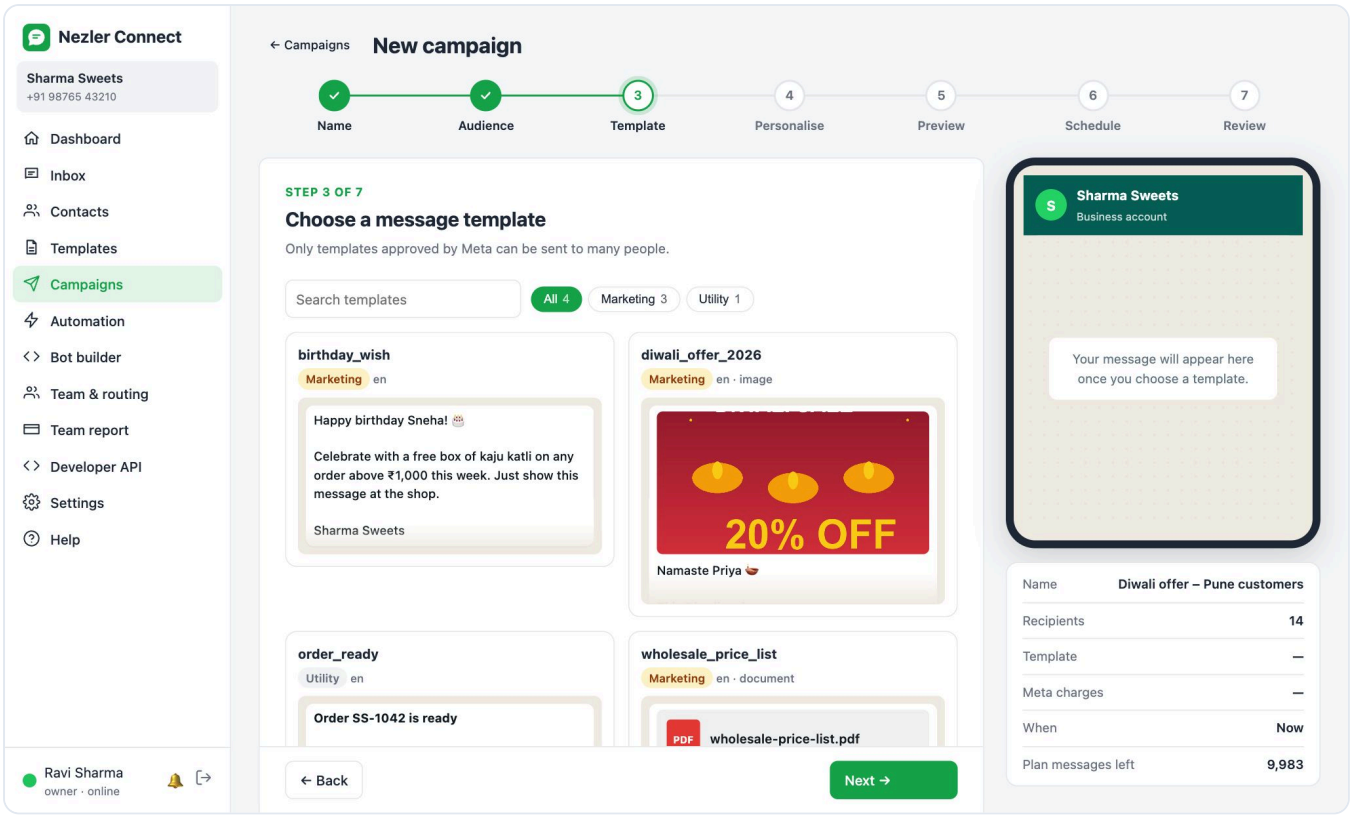
The green counter shows how many people will receive it. Opted-out contacts and duplicates are removed automatically. Keep **Skip numbers we know aren't on WhatsApp** ticked to avoid paying for messages that can't arrive.



Step 2: choose the audience

Step 3: Template

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



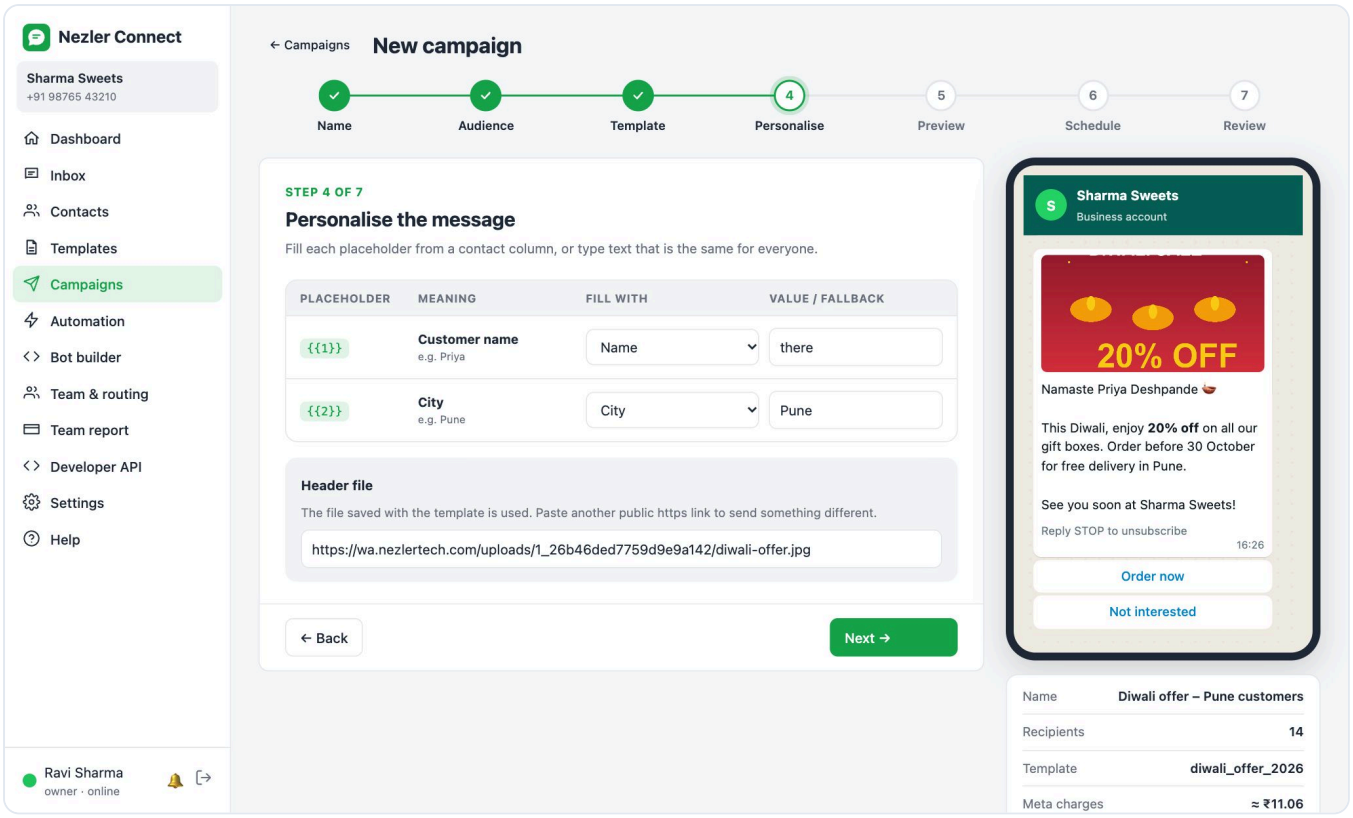
Step 3: choose a template

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.

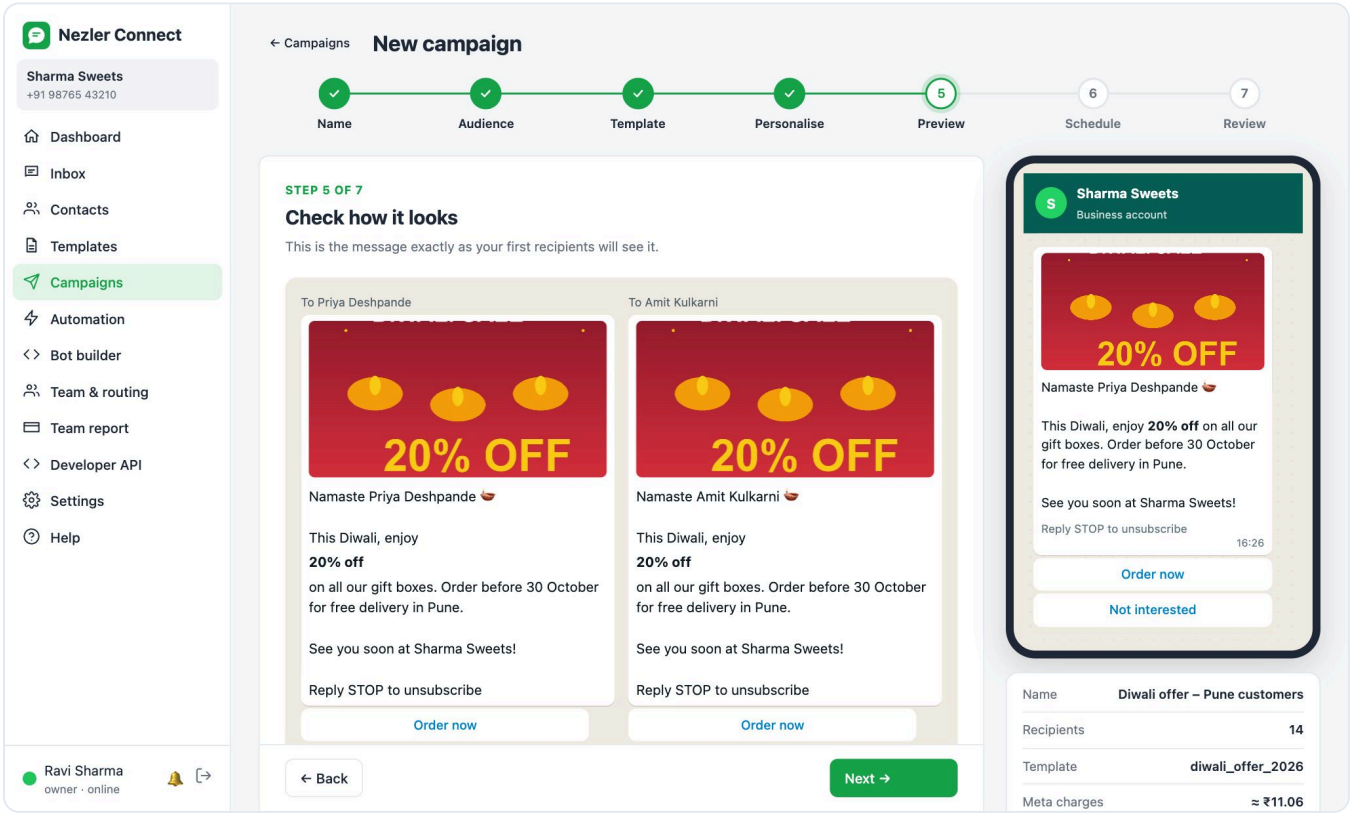
If the template has an image, video or PDF header, the file saved with the template is used. Paste another public link to send something different.



Step 4: personalise the message

Step 5: Preview

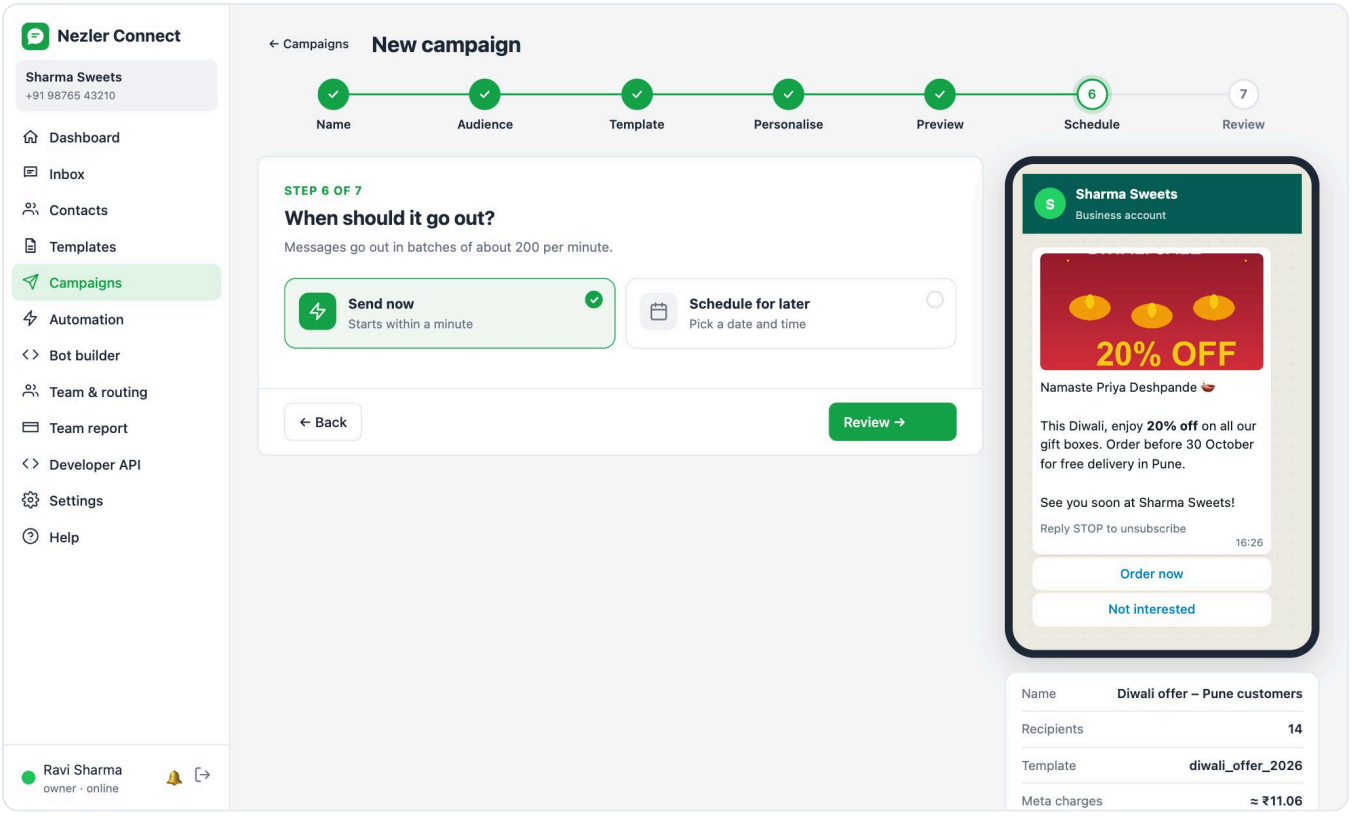
See the message as your first recipients will receive it, with their real names. Then send a test to your own WhatsApp number: type it and click **Send test**.



Step 5: preview and send a test

Step 6: Schedule

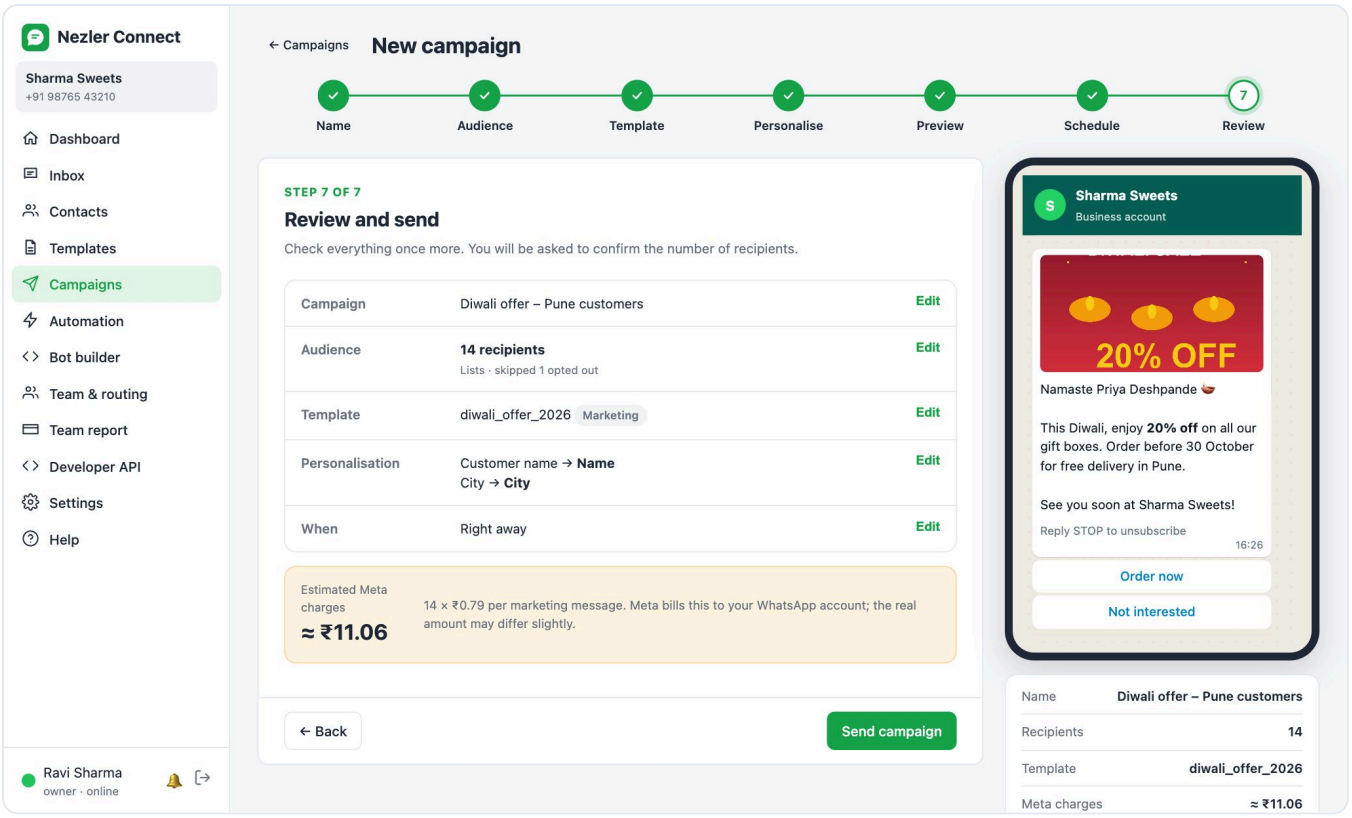
Choose **Send now**, or **Schedule for later** and pick the date and time. Messages go out in batches of about 200 per minute.



Step 6: choose when

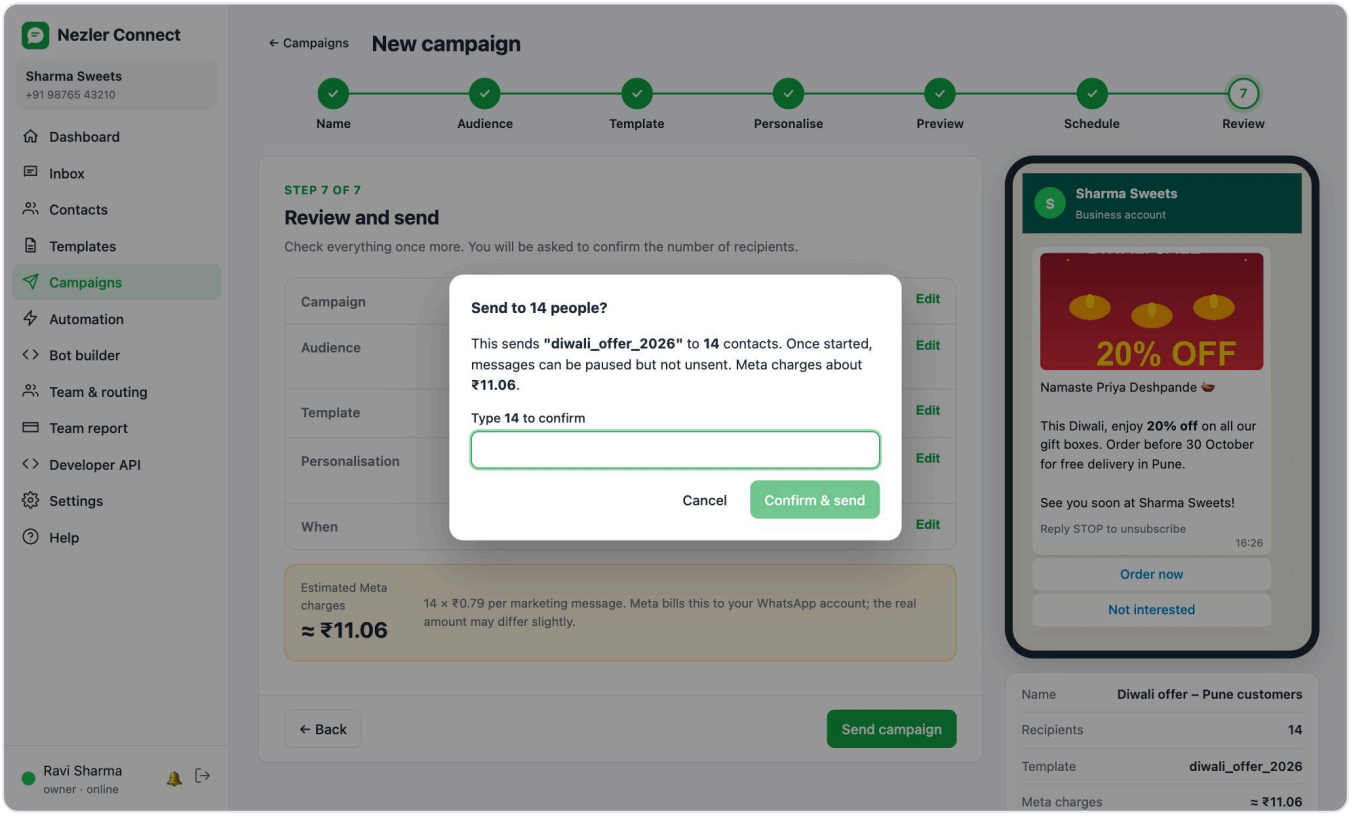
Step 7: Review and send

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.

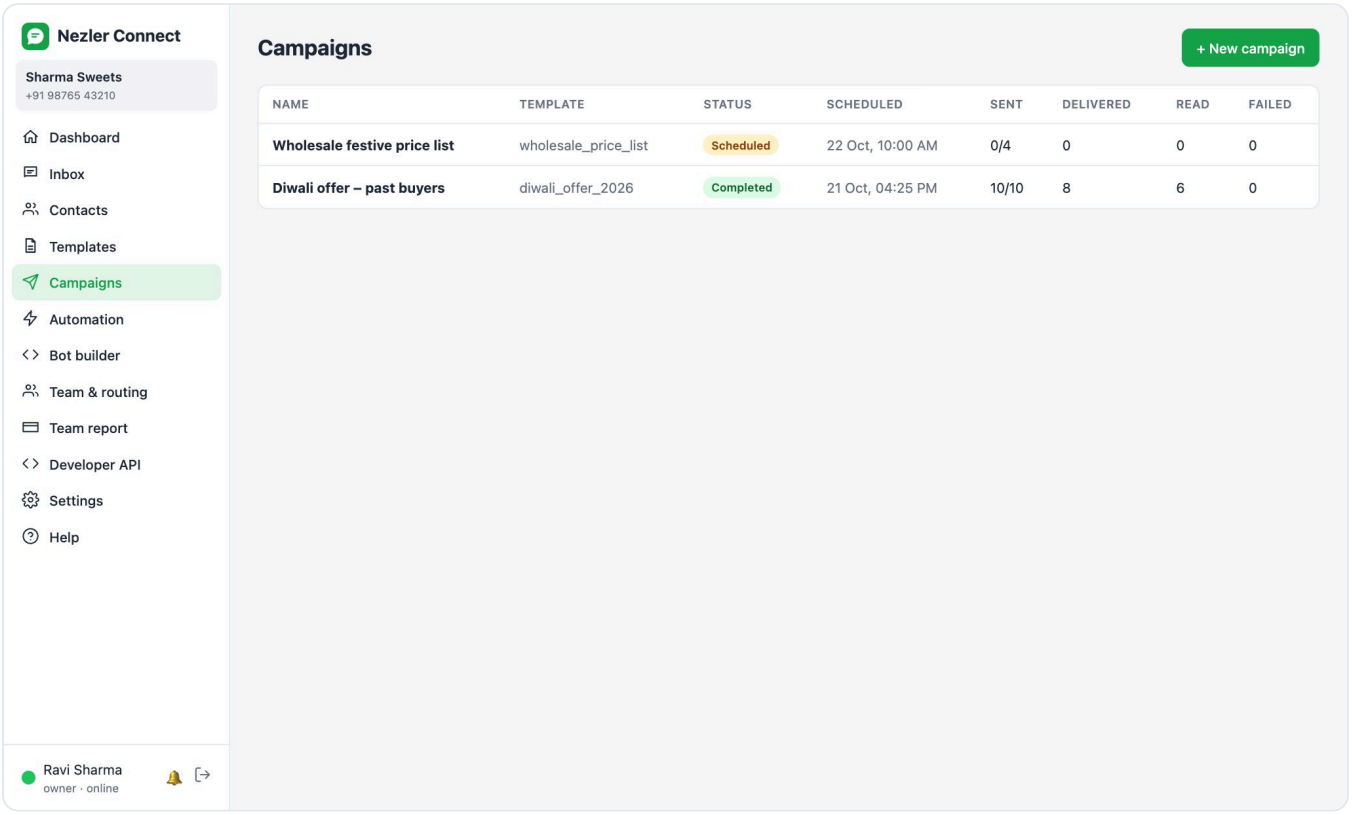
Tip To send to a filtered group, for example everyone in Pune whose birthday is this month, filter on the Contacts page, select all matching, then click **Send campaign**. The wizard opens with those people already chosen.

TEMPLATES & CAMPAIGNS

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.



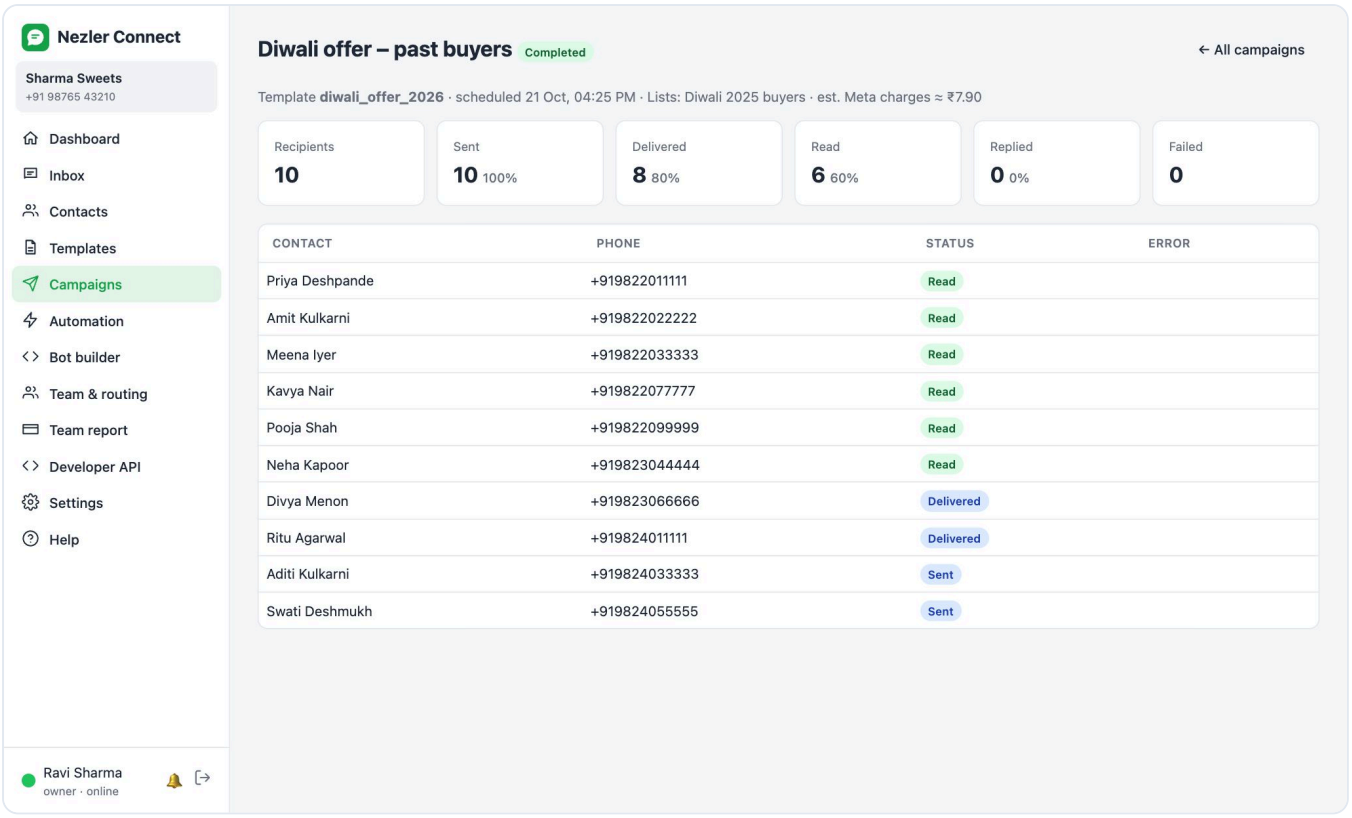
The Campaigns page

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.

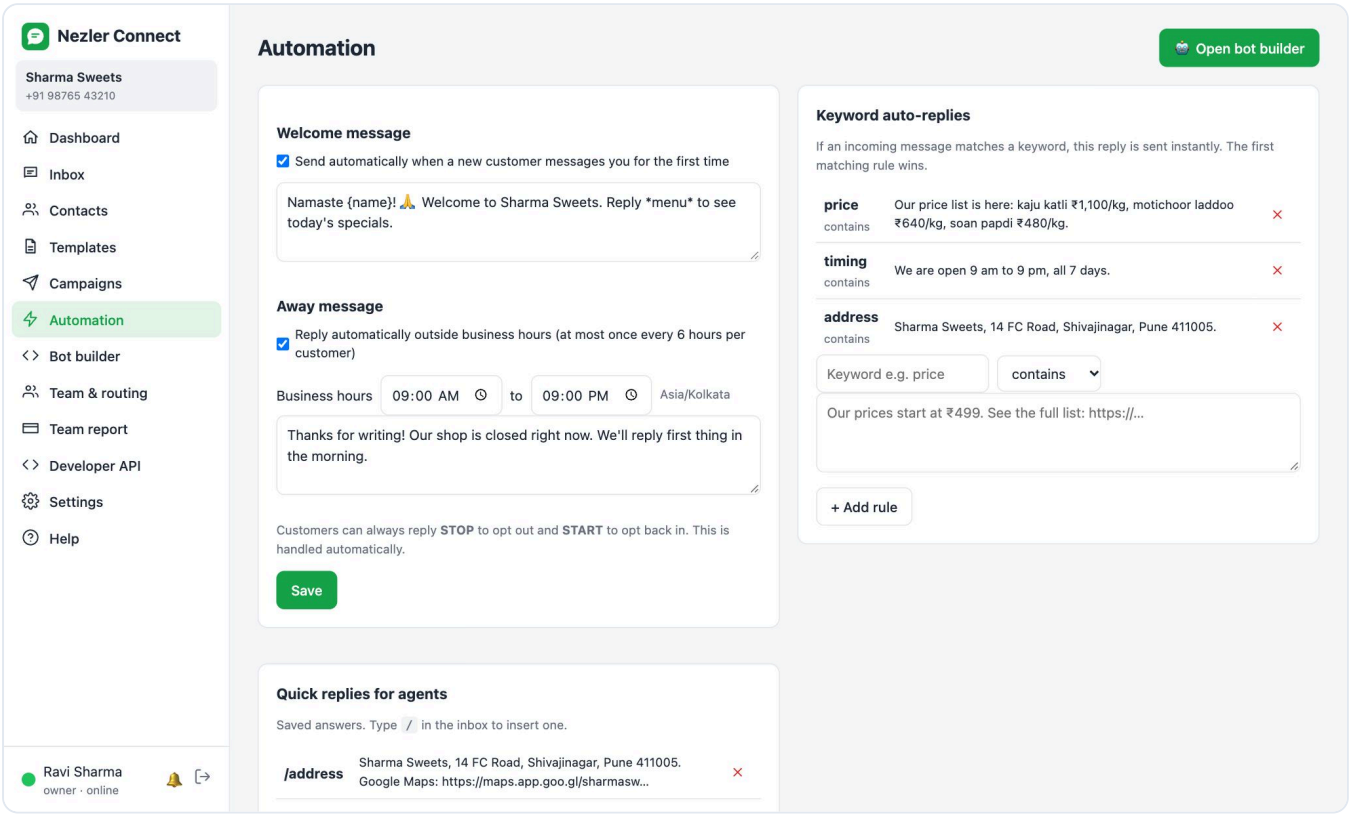
> **Tip** Replies to a campaign arrive in the Inbox like any other chat. Use routing rules to send campaign replies to your sales team automatically.

AUTOMATION

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.



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.

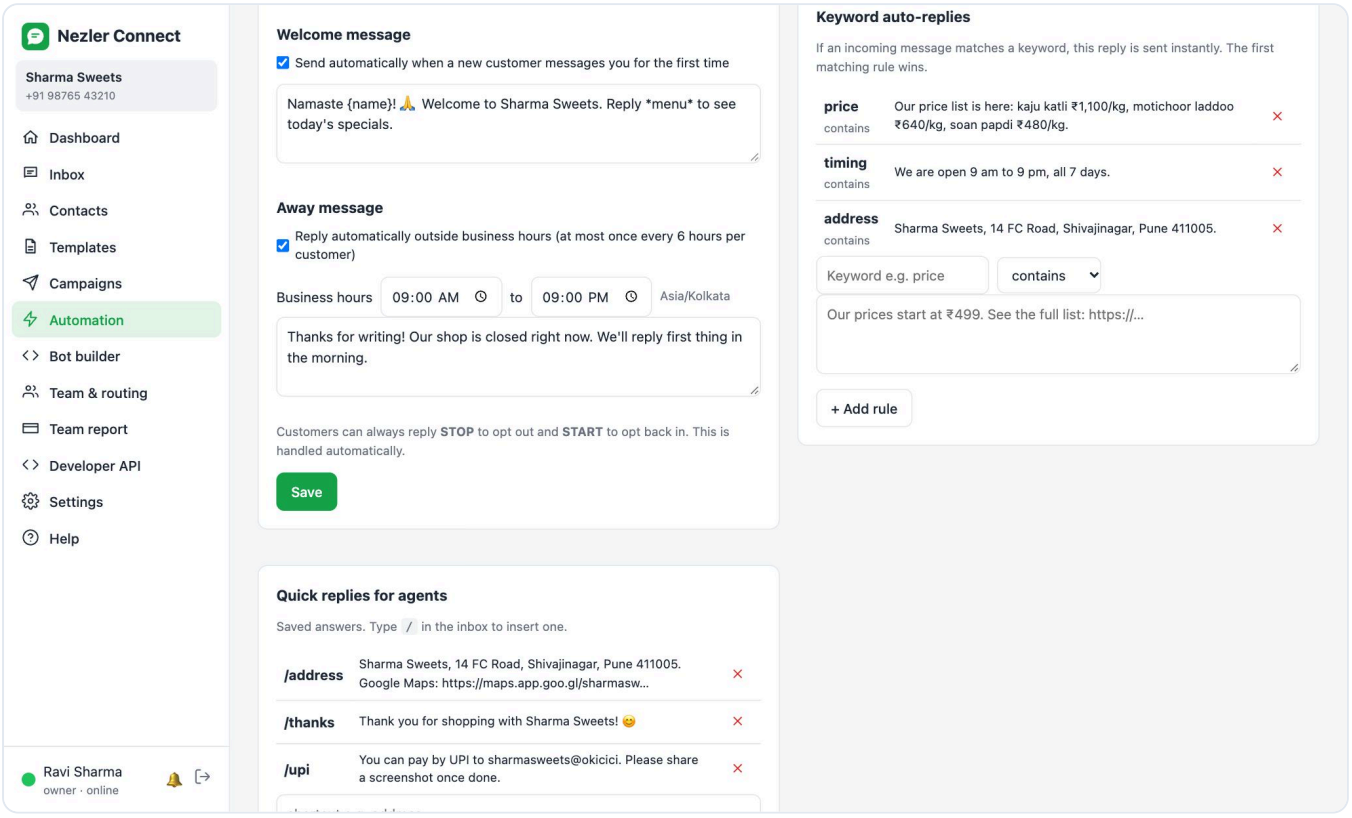
1. Tick **Reply automatically outside business hours**.
2. Set your **business hours**, for example 09:00 to 21:00. They use your time zone from Settings.
3. Write the message, for example "We're closed right now. We'll reply first thing in the morning!"
4. Click **Save**.

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 ✕ to delete a rule.



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.

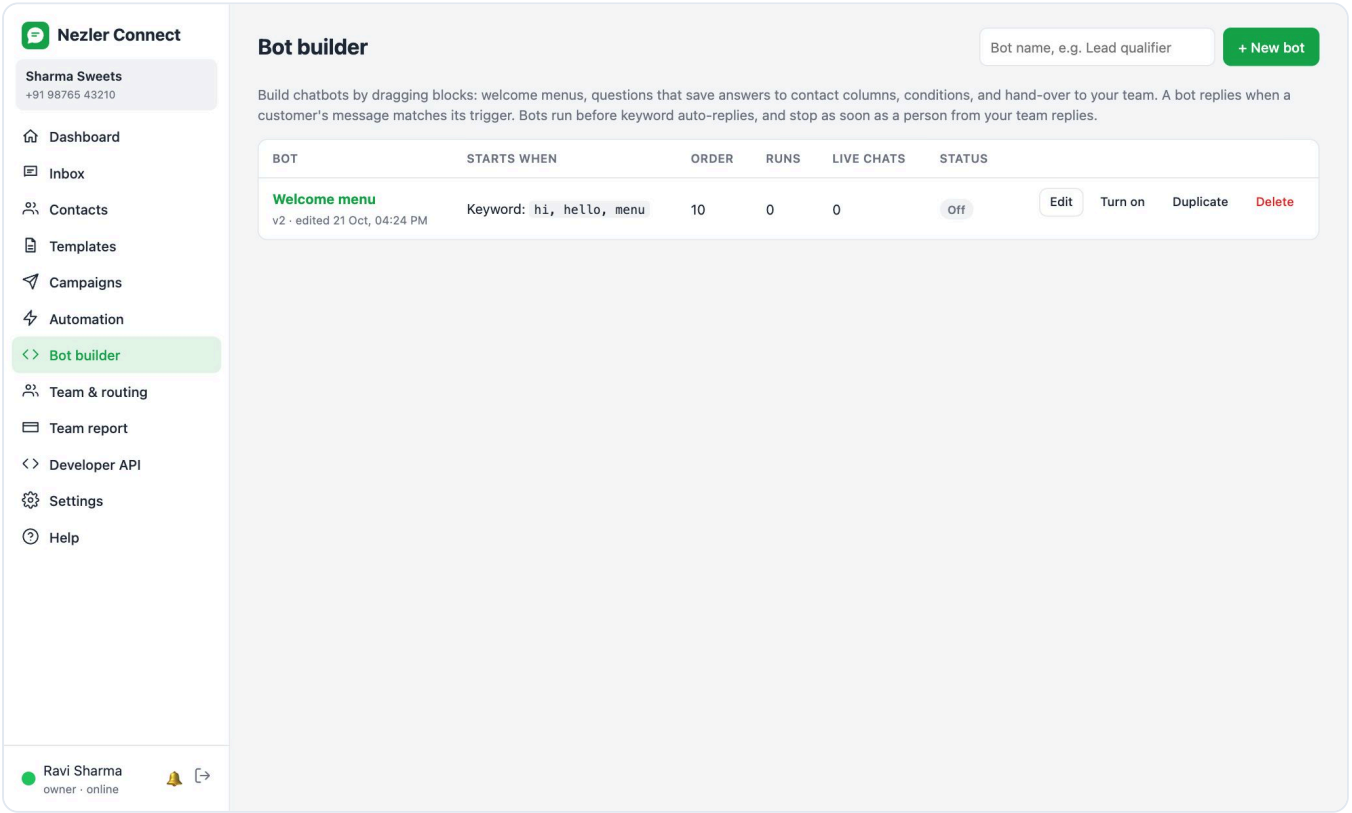
> **Important** The bot builder depends on your plan. If you don't see **Bot builder** in the menu, ask us to upgrade your plan.

Your bots

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

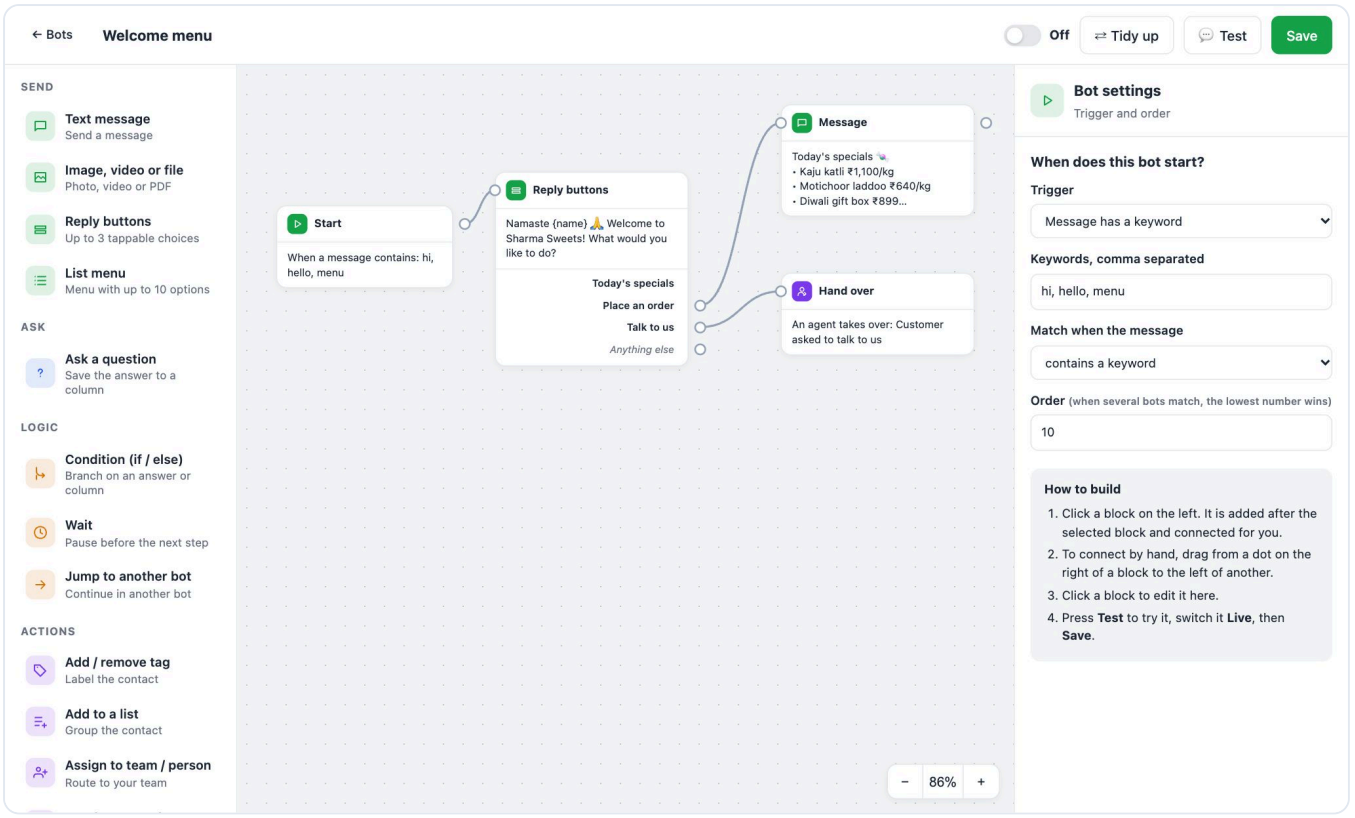
- what starts it, for example a keyword
- its order
- how many times it has run
- how many chats it's handling now
- whether it is **On** or **Off**

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



The list of bots

The builder



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

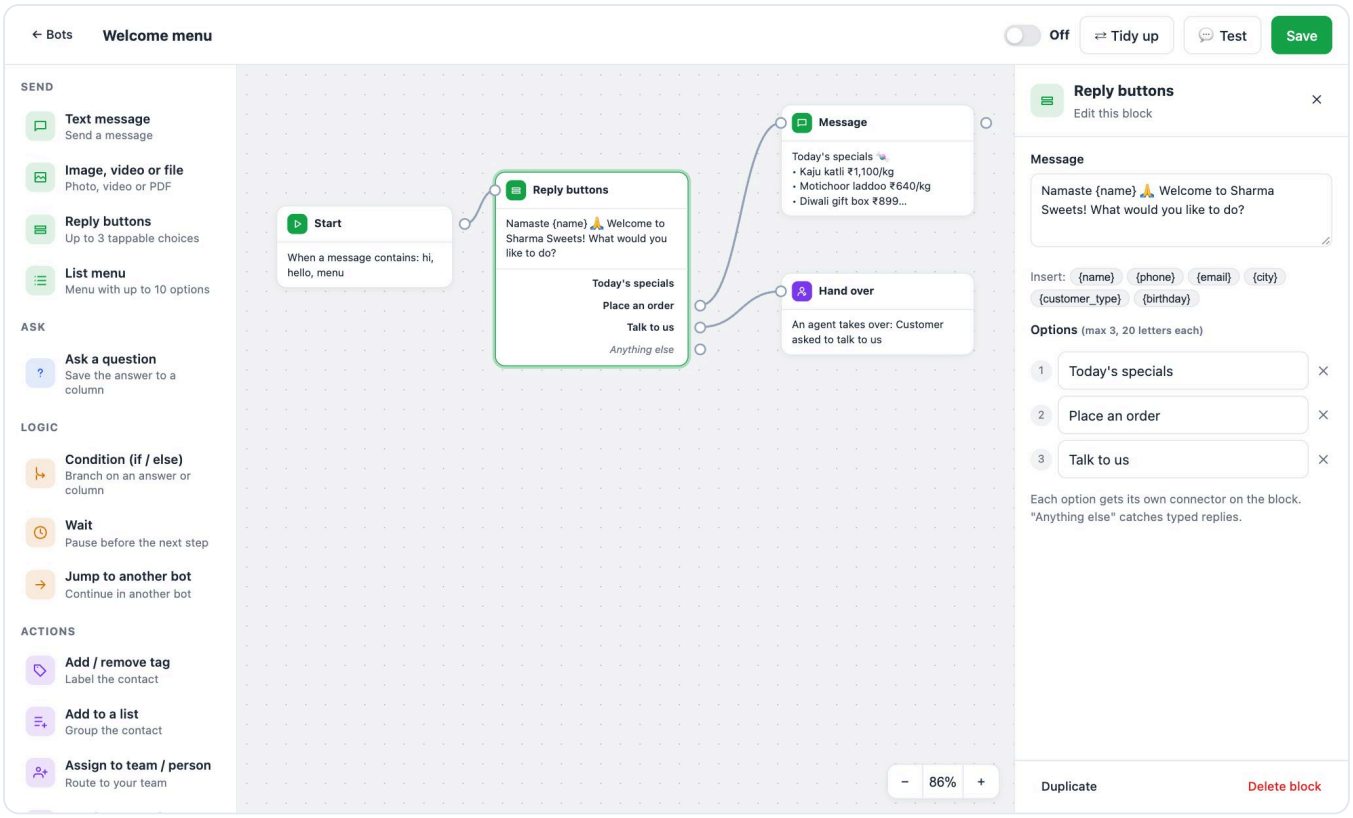
- **Left**: the blocks you can add, grouped as **Send**, **Ask**, **Logic** and **Actions**.
- **Middle**: the canvas. Every bot begins at **Start** and flows from left to right.
- **Right**: the settings panel for whatever you've selected.
- **Top**: the bot's name, the **Live** switch, **Tidy up**,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



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.

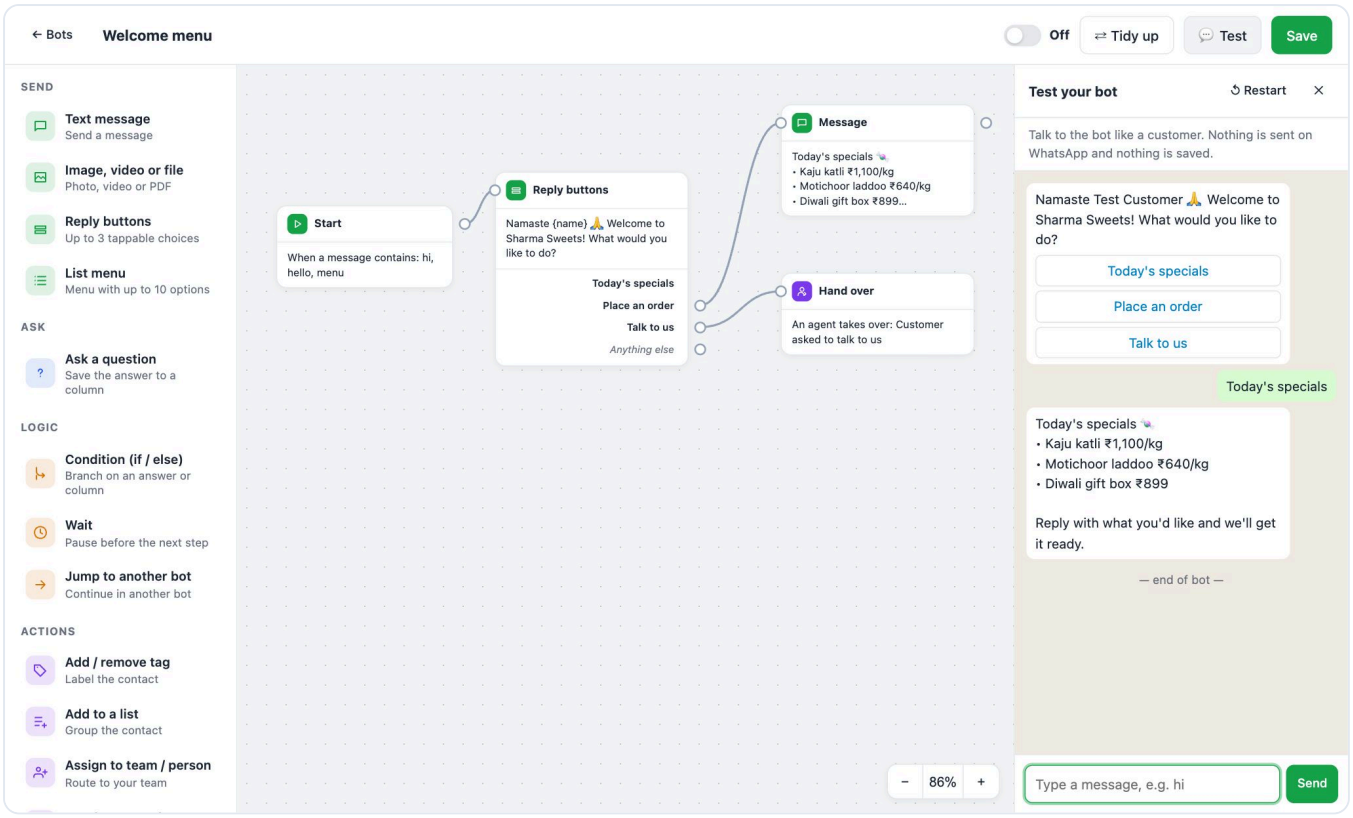
When does the bot start?

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).



Testing the bot

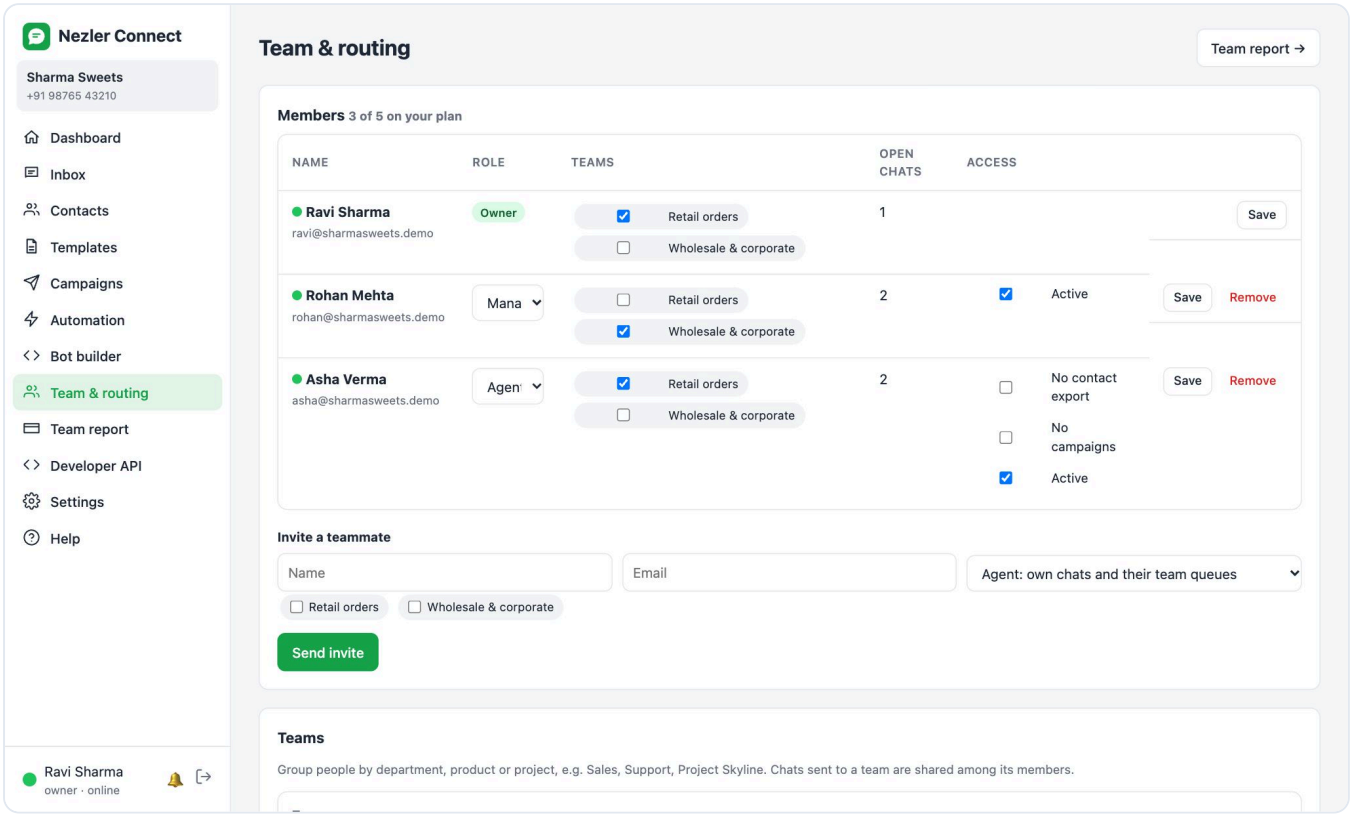
Tip A bot stops as soon as someone from your team replies in that chat, and agents can pause it from the Inbox. Bot replies are free because the customer wrote first.

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.



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.

TEAM

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

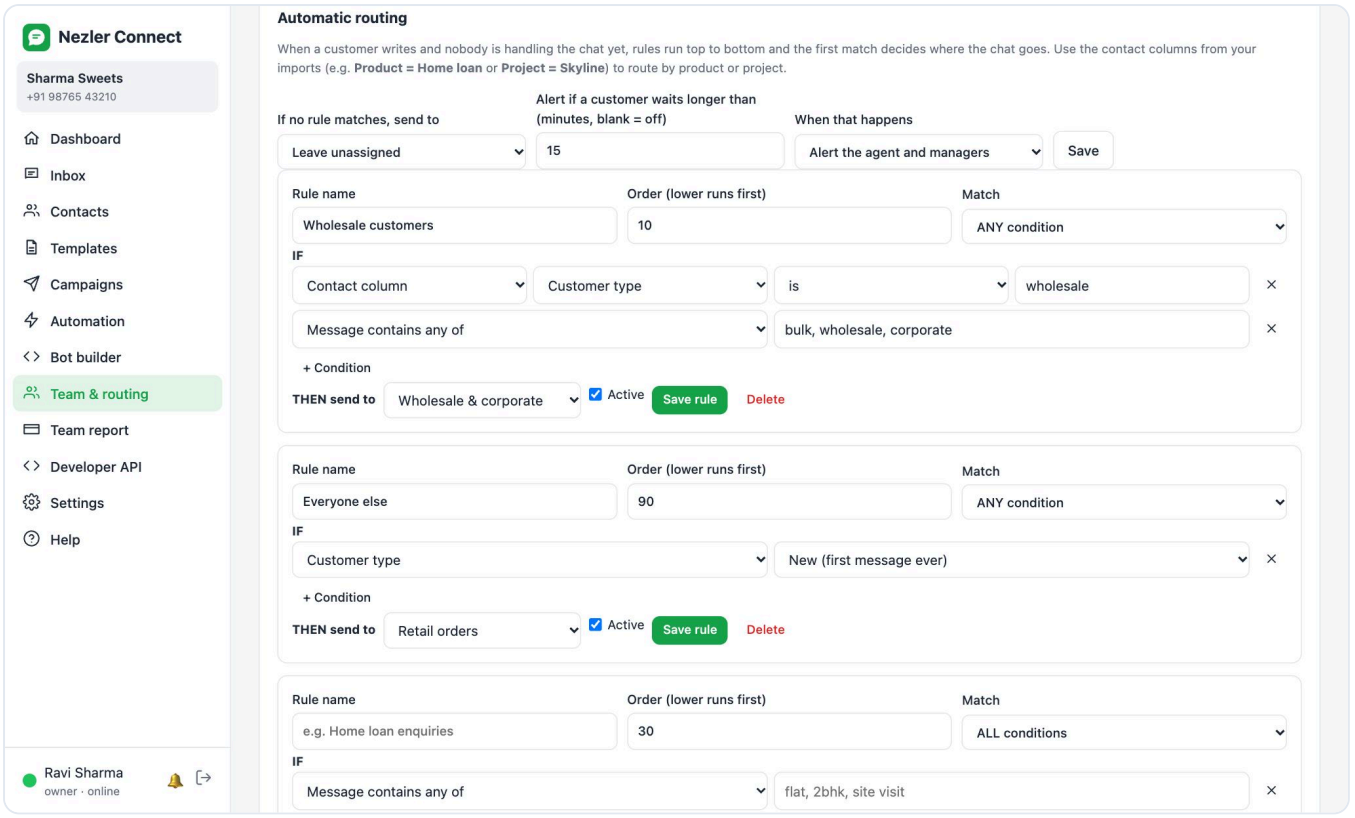
A team is a group of people who share chats, such as Sales, Support, a product or a project.

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**.



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.

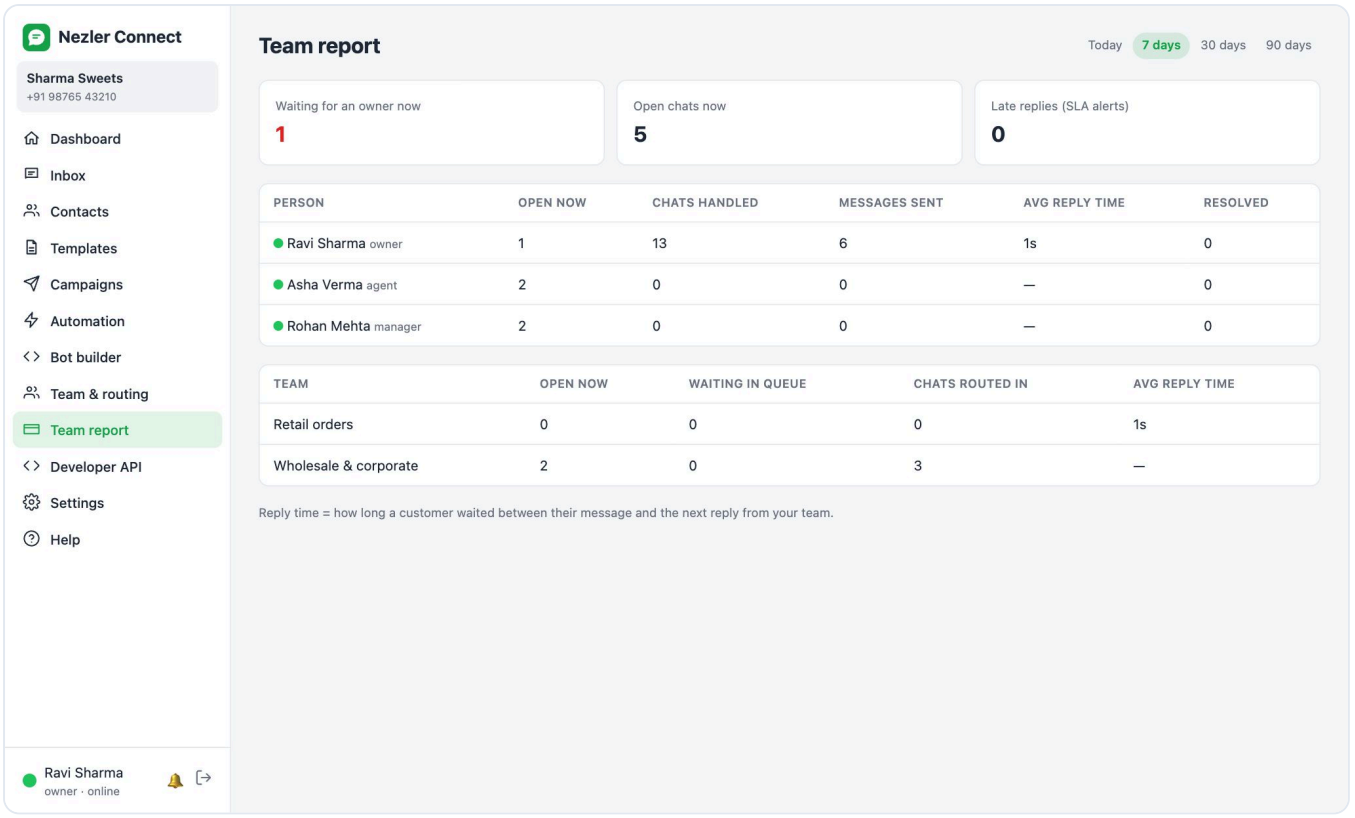
Late-reply safety net

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



The team report

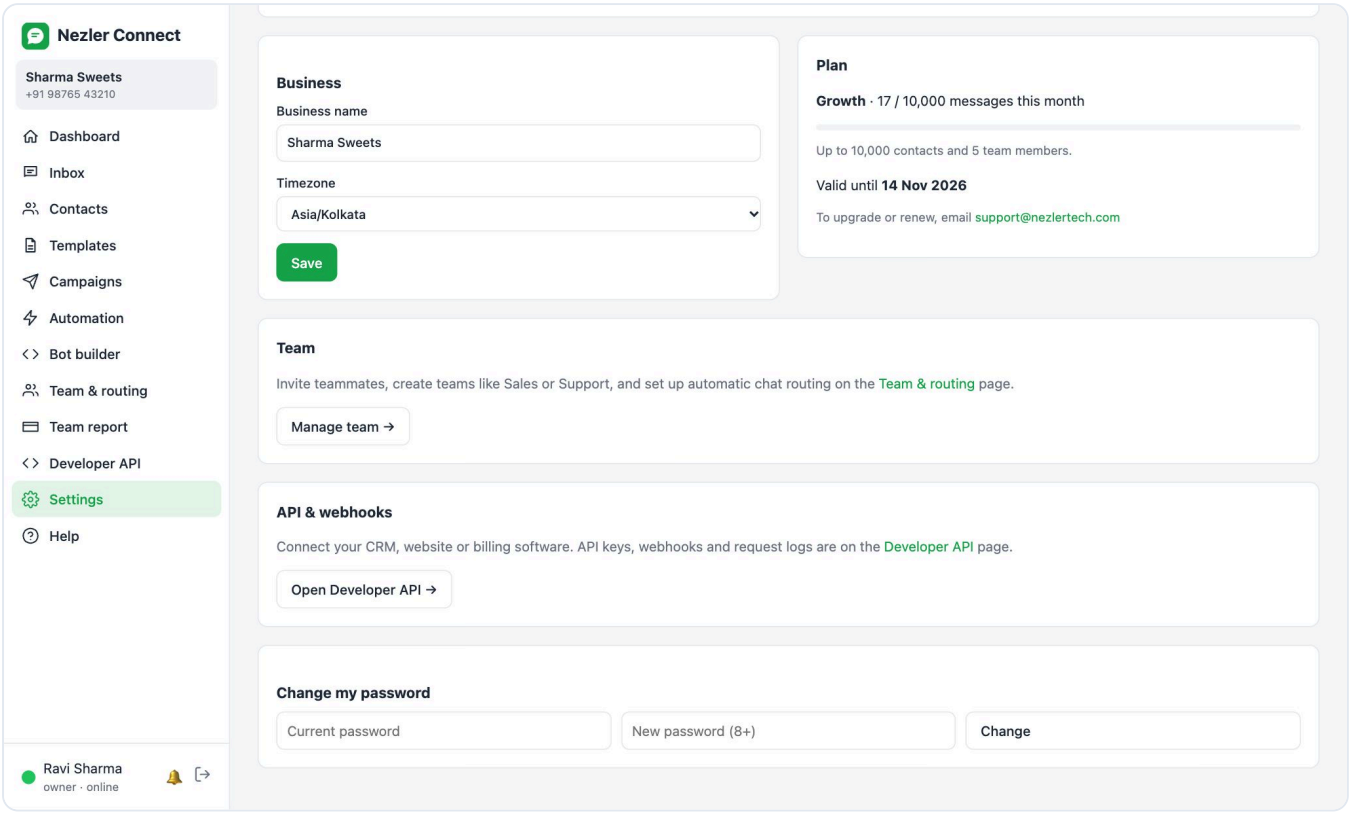
Reply time is how long a customer waited between their message and the next reply from your team.

ACCOUNT & MORE

Business settings and password

Your business name, time zone, plan and password.

Open **Settings** in the menu.



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.

ACCOUNT & MORE

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:

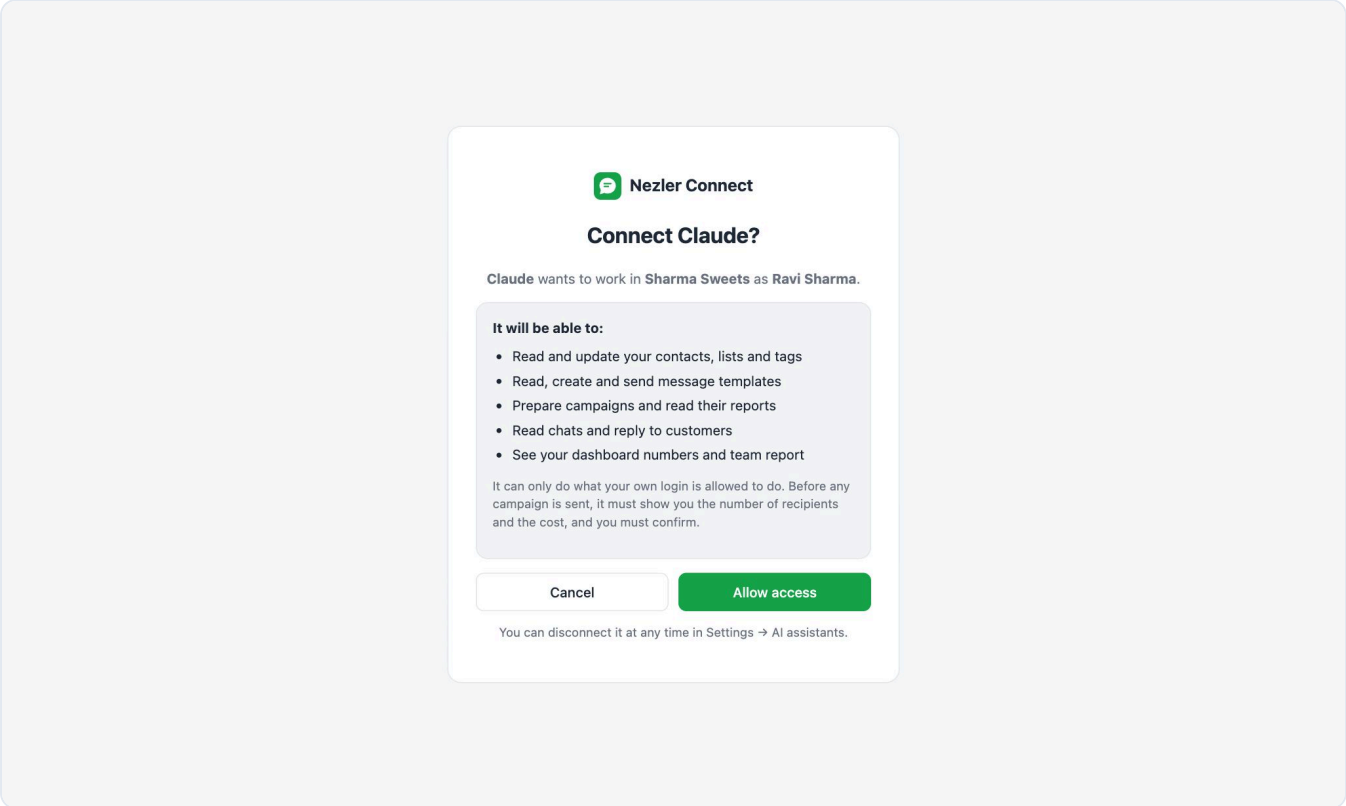
- "How did last week's Diwali campaign do? Who hasn't read it yet?"
- "Send the Diwali offer to everyone in my Pune customers list tomorrow at 10 am."
- "Make a template from this poster with a 'Order now' button, and tell me when Meta approves it."
- "Add Lata Joshi, 9811223344, from Pune, to the Ganpati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

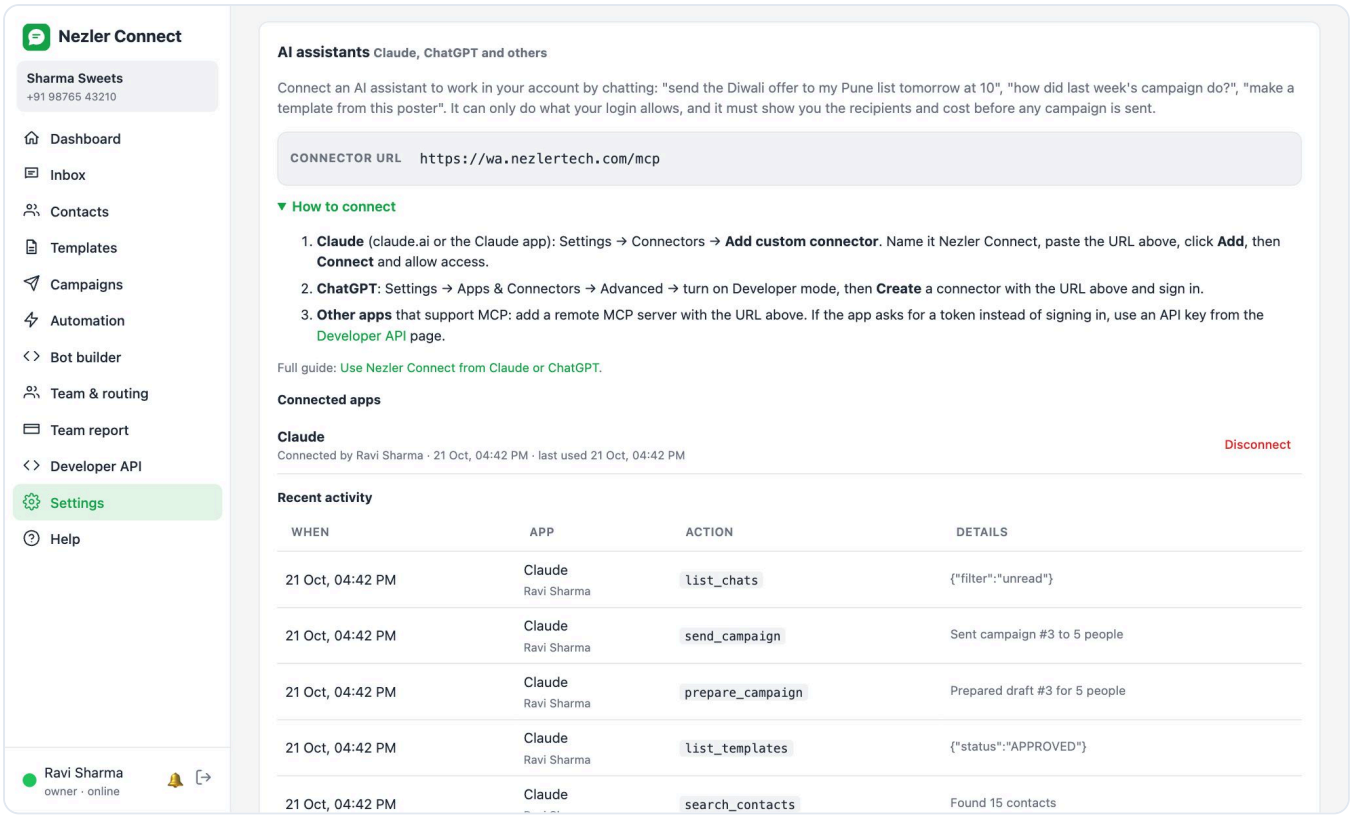
- how many people will receive it, and who was skipped
- the estimated Meta charges
- how the message will look for real recipients

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.



Connected apps and recent activity in Settings

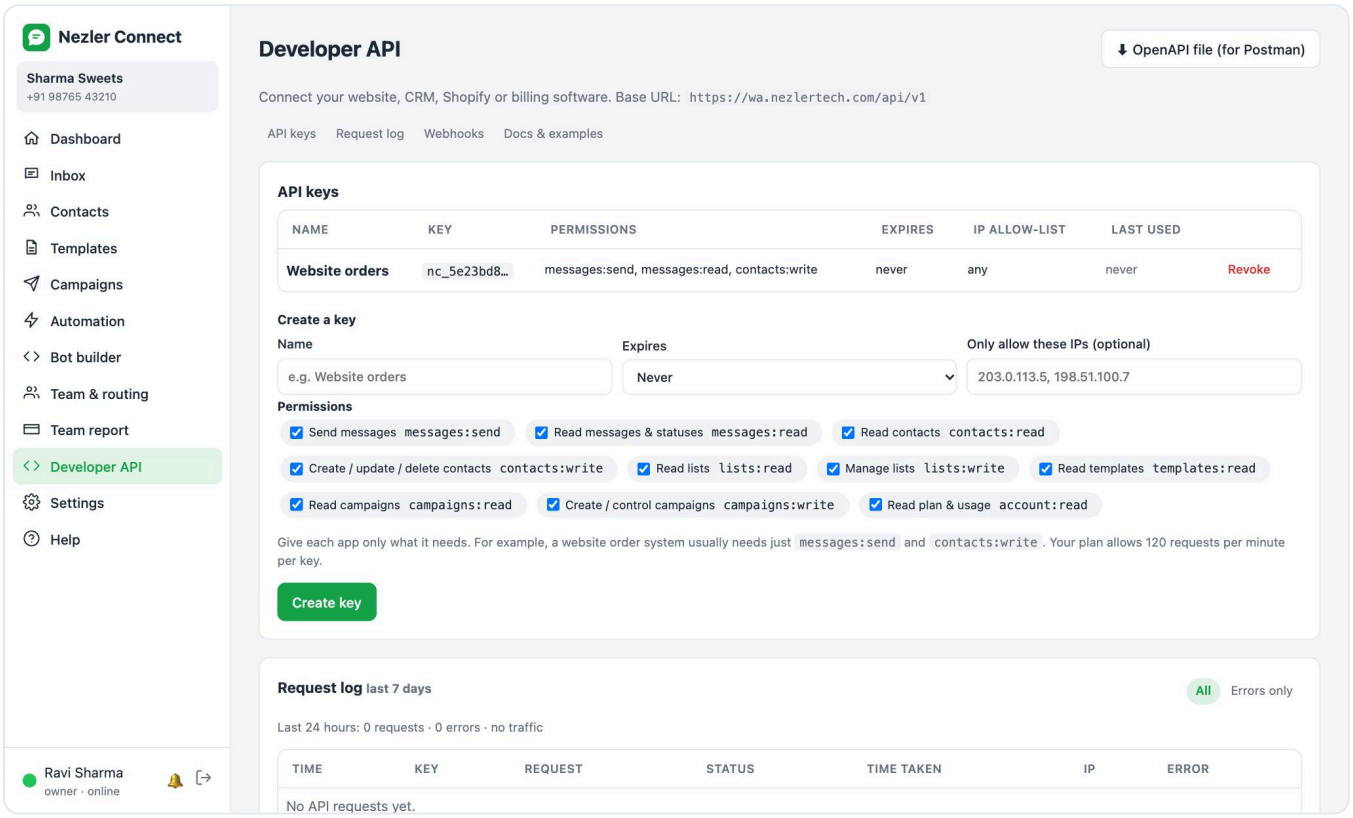
Tip Each person connects with their own login. An agent's assistant can only see that agent's chats, and can't send campaigns if the owner has blocked campaigns for them.

ACCOUNT & MORE

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.



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.

ACCOUNT & MORE

Use it on your phone

Reply on the go with the mobile app.

Nezler Connect works on any phone browser. Open **wa.nezlertech.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.

ACCOUNT & MORE

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.