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eServices Manager Plug-in for GAX

WhatsApp Message Templates

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WhatsApp Message Templates

This page explains how to create a [structured message](#) for WhatsApp.

Structured messages for WhatsApp (also known as message templates) use specific message formats that your company can use to notify customers about things such as an upcoming appointment or promote a product with a marketing message. You can use eServices Manager to create and format the structured message for WhatsApp.

Warning

Before continuing, you must request that Genesys submit your message template to WhatsApp for approval before you can create and use the structured message in eServices Manager. We will submit it on your behalf and notify of the approval or rejection, along with the “namespace” which is needed to create the message template in Genesys eServices Manager. See the [Message Template Guidelines from WhatsApp](#) for more information.

[Click here for the message template request form.](#)

Starting June 1, 2023, WhatsApp is expanding their conversation-based pricing model to move from two conversation categories (User-initiated and Business-initiated) to four categories. Business-initiated conversations will be unbundled into three categories reflecting three key use cases: **Utility**, **Authentication** and **Marketing**. User-initiated conversations will be renamed to **Service** conversations. We have updated the request form to account for these categories when selecting your Template Category.

Before you begin filling in this form, be sure to check out the following articles from WhatsApp:

- [Updates to Conversation-based Pricing](#)
- [New Guidelines for Utility, Authentication and Marketing Templates](#)
- [Additional information on Message Templates](#)

[Link to video](#)

Creating a structured message for WhatsApp

Important

Before proceeding with creation of structured messages, ensure that all the required Business Attribute values (for WhatsApp) are configured as described in [Configuring](#)

structured messages.

1. Create a standard response.
2. Go to the **Structured Body** tab.
3. Select **Structured**.

The screenshot shows the 'Edit Standard Response' dialog box with the 'Structured Body' tab selected. The 'Structured' radio button is chosen. The 'Media Origin' dropdown is set to 'Genesys JSON' and the 'Type' dropdown is set to 'Notification'. The 'JSON Part' field at the bottom contains an empty JSON object `{}`.

4. In the **Media Origin** menu, select **Genesys JSON**.
5. In the **Type** menu, select **Notification**.
6. Click **Edit JSON** to configure the structured message. See the [Configuring the structured message](#) section below for more information.
7. Optionally, you can directly edit the JSON associated with the media type in the provided field, or click **Open File** to load a JSON file from your local machine.
8. Optionally, [add field codes](#).

Important

You must not use double-quotation marks (") for field codes that are used in structured messages. Use single quotation marks (') instead.

9. Click **Create**.

Configuring the structured message

Starting with version 9.0.000.09, you can edit a Media Notification template of the standard response that was previously created and saved in UCS. In addition, starting with version 9.0.002.05, you can view a JSON structure.

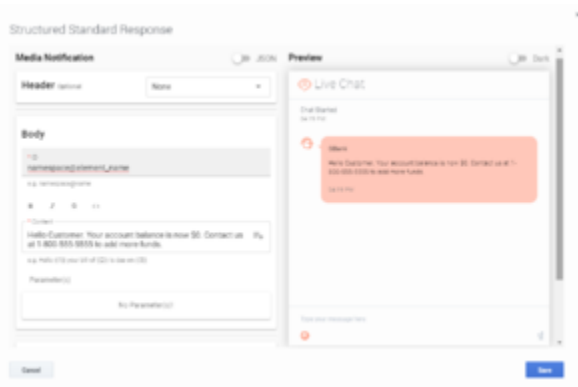
A short video on how to configure a Media Notification template: [Link to video](#)

Media Notification template: Body section


After you click **Edit JSON**, an editor appears that allows you to edit the mandatory **Body** section of the structured message.

In the **ID** field, enter the *namespace@element_name* ID for the structured message (provided in WhatsApp Manager after WhatsApp has approved the message).

In the **Content** area, compose the content of your message. For example, let's say you want to create a message to let customers know when their account balance is \$0. Enter the following message: Hello Customer. Your account balance is now \$0. Contact us at 1-800-555-5555 to add more funds.



Example of the general body message

You can use **field codes** to introduce parameters for known data. For example, instead of Customer, you can use `<$Contact.FirstName$>`. In the **Content** area, remove Customer and then click  to add parameters. Notice how a variable has been added to the **Content** area (as this is the first variable, it's `{{1}}`). In the **Parameters** section, you can define the `{{1}}` variable as such:

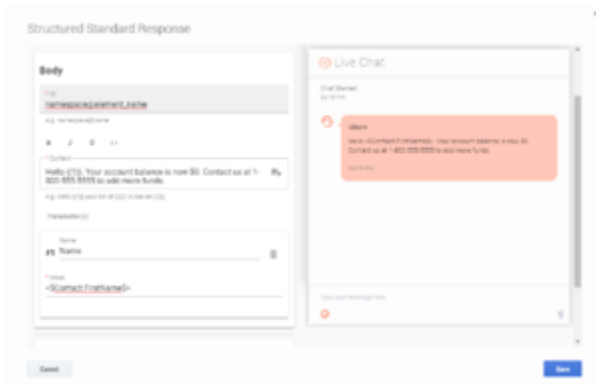
- **Name**—Enter the name of the variable. For example, Customer.
- **Value**—Enter the field code to use. For ease of use, you can:
 1. Enter a temporary value in the **Value** field.
 2. Click **Save** to save the message template and return to the **New/Edit Standard Response** window.
 3. In the **JSON Part** section, find the temporary parameter value you used earlier (for example, "value": "Sample_Value") and select the sample value.

4. Click **Insert Field Code**.
5. Select a field code and click **OK** to insert it, together with its required delimiters (<\$ \$>), into the standard response.

Important

Only use field codes in parameter values.

The **Content** area now looks like this:

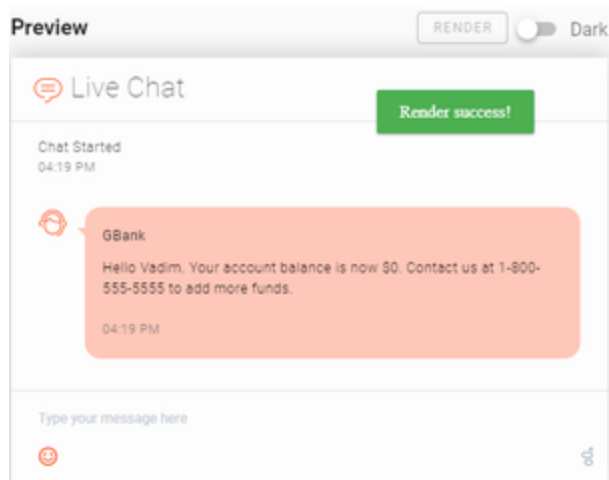


Example of the customized body message

As you edit the **Content** area, a live preview appears on the right to show you how the message will appear to the customer. Field codes are rendered when the message is inserted into a WhatsApp interaction by an agent in Workspace. However, when eServices Manager detects a field code in the message, you can click **Render** (located above the live preview area) to render the field code with its default value.

Optionally, you can use the toolbar in the **Content** area to use bold (B), italics (I), strikethroughs (S), and highlights (<>).

When you are done, click **Save**.



Example of the live preview area with the rendered field code

Media Notification template: optional sections

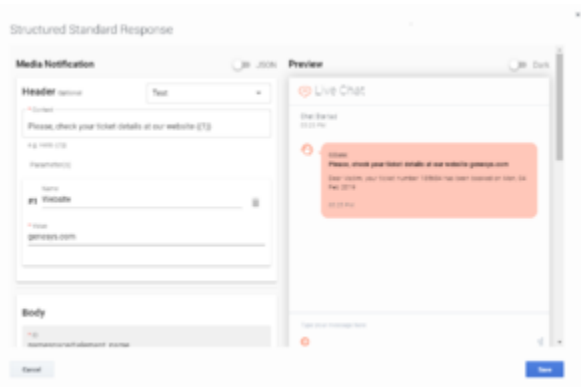
Starting with version 9.0.002.05, the Media Notification template adds the following optional sections:

- Header
- Footer
- Buttons

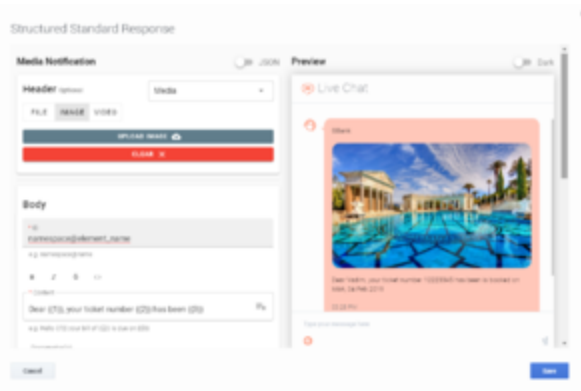
Header

In the **Header** section, you can configure content that is displayed at the top of the **Body** section of a WhatsApp notification-type message:

- **Text**—A header containing the text content with one parameter or without parameters. The parameter value can contain field codes.
- **Media**—A header containing the media content of the following types: file, image, or video.



Example of the text header



Example of the image header

Media content can be used for:

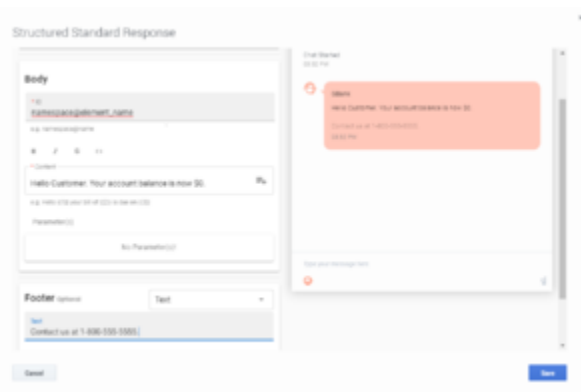
- Sending personalized content—A media file, image, or video is added from the header when an agent sends a message to a particular customer. Note that the header contains only definition of the media content type but not a media file itself. The media file can be customized and inserted into a WhatsApp interaction by an agent in Workspace.
- Sending common content—A media file, image, or video is uploaded to the header through a corresponding **Upload** button and then automatically attached to a message when it sends out.

Important

Any new downloaded media file in the **Header** section replaces the existing media file in a standard response. The previous files remain in the environment. Genesys recommends deleting the files that are not in use manually, using the **Edit Attachments** window.

Footer

In the **Footer** section, you can configure the static text content that is displayed below the **Body** section of a WhatsApp message, by selecting **Text** and entering the footer content.

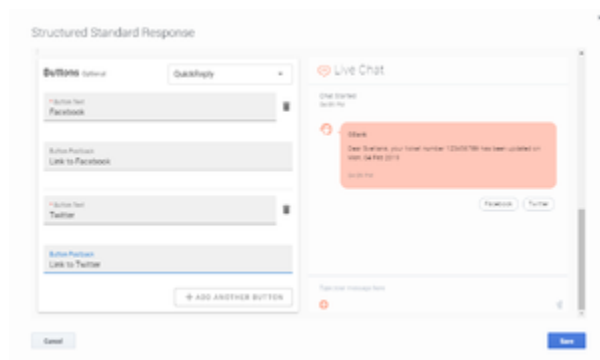


Example of the footer

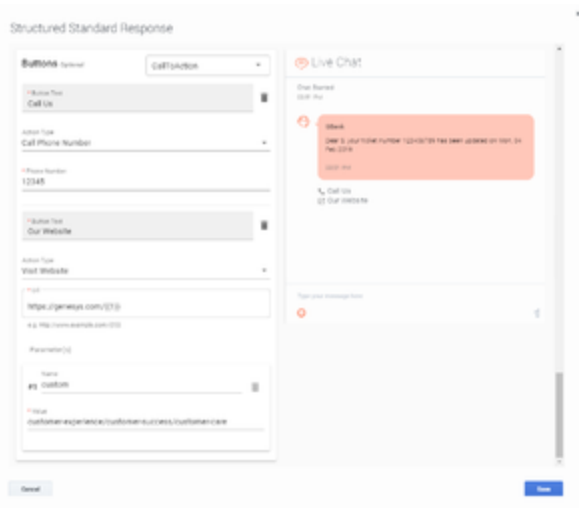
Buttons

In the **Buttons** section, you can configure predefined button sections that are displayed at the bottom of a WhatsApp message. The following Button options are available:

- **QuickReply**—Enables adding up to three quick replies buttons and contains the following items:
 - **Button Text**—Populates with a value from the WhatsApp template. The button text is returned along with the Button Postback text to the webhook when a user clicks the button.
 - **Button Postback**—Populates with the Postback text (Optional).
- **CallToAction**—Enables adding up to two call-to-action buttons and contains the following items, depending on the action type:
 - **Call Phone Number:**
 - **Button Text**—Populates with the button text from the WhatsApp template.
 - **Action Type**—Call Phone Number.
 - **Phone Number**—Populates with the phone number from the WhatsApp template.
 - **Visit Website:**
 - **Button Text**—Populates with the button text from the WhatsApp template.
 - **Action Type**—Visit Website.
 - **URL**—Populates with the URL from the WhatsApp template. The URL can contain one parameter. The parameter value is used at the end of the URL.



Example of the QuickReply button



Example of the CallToAction button

Interactive messages

Important

To create Interactive messages, you must ensure that all the required Business Attribute values (for WhatsApp) are configured as described in [Configuring structured messages](#).

Starting with 9.0.004.01, eServices Manager supports Interactive messages. Interactive message templates offer the customer a choice of responses to the last agent or last chat bot message in the transcript. Selecting one of these buttons sends that reply to the agent as an inbound text message. This saves the customer from having to type a response manually.

eServices Manager does not support field validation. Users must refer to the latest WhatsApp documentation, [Sending Interactive Messages](#) for more information.

Currently, the **Reply Buttons** and **List Messages** templates are supported.

Reply Buttons

Reply Button is a media origin type that allows you to set up to 3 buttons that a customer can choose from.

You can configure the following options:

- **Header**—Enter a text message or attach any media content of the following types: file, image, or video.
- **Body**—Enter a context of the message.
- **Footer**—Enter the static text content that is displayed below the **Body** section.
- **Buttons**—Enter a label for each button in the **Button Text** field.

Structured Standard Response

Reply Button

Header Optional Media

FILE IMAGE VIDEO

UPLOAD IMAGE

Body

Text

Footer Optional Text

Buttons

Button Text 1

Button Text 2

Button Text 3

Preview

Live Chat

Chat Start

Body

Footer

Buttons

Send

Example of Reply Buttons

List Messages

List Message is a media origin type that allows you to set up to 10 menu options that a customer can choose from. You can configure the following options:

- **Header**—Enter a text message.
- **Body**—Enter a context of the message.
- **Footer**—Enter the static text content that is displayed below the **Body** section.
- **List**
 - **Submit label**—Enter a label for the submit button.
 - **Sections**—Enter a section name in the **Title** field. There can be multiple sections. Each section can have one or more rows.
 - **Rows**—Enter a **Title** and **Description** for each row. Each row is shown as an option for the customer to choose.

The screenshot displays the 'Structured Standard Response' editor for a WhatsApp message template. It is divided into two main panels: 'List Message' on the left and 'Preview' on the right.

List Message Panel:

- Header:** Includes a 'Text' input field and a 'Header' label.
- Body:** Includes a 'Text' input field and a 'Body' label.
- Footer:** Includes a 'Text' input field and a 'Footer' label.
- List:** Includes a 'Submit Label' input field.
- Sections:** A section titled 'Sections' with a warning icon and text: 'WhatsApp: Total rows for all sections combined should exceed 10 rows'. It contains two sections:
 - Section #1:** Includes a 'Text' input field and a 'Section#1' label.
 - Rows:** A section titled 'Rows' containing two rows:
 - Row #1:** Includes a 'Text' input field and a 'Section#1_Row1_Description' label.
 - Row #2:** Includes a 'Text' input field and a 'Section#1_Row2_Description' label.

Preview Panel:

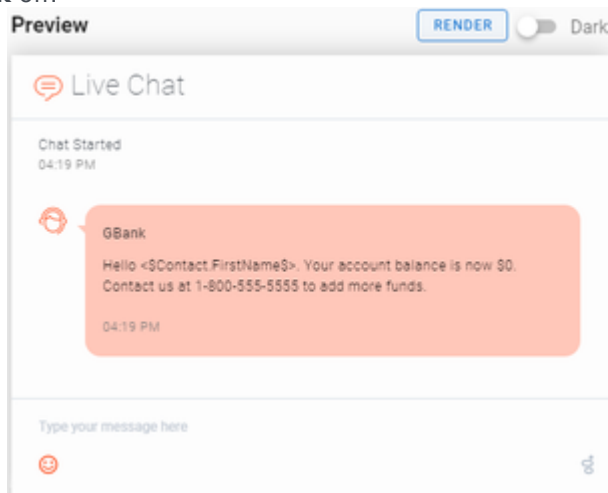
- Shows a 'Live Chat' interface with a 'Chat Started' message at '04:19 PM'.
- Displays a 'GBank' message bubble with the text: 'Hello <\$Contact.FirstName>, Your account balance is now \$0. Contact us at 1-800-555-5555 to add more funds.' and a timestamp of '04:19 PM'.
- Includes a 'Type your message here' input field and a 'SEND' button.

Example of a List Message

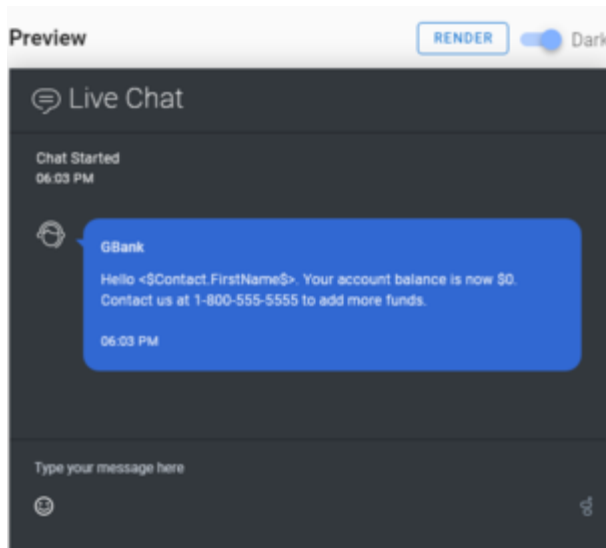
Dark mode

Optionally, you can select **Dark** to use dark mode. Below is a comparison:

- **Dark off:**



- **Dark on:**



Language and country in Notification template

After a **Notification** is created for **Genesys JSON**, the **JSON Part** field contains the key-value pair (KVP), language, with values from the **language** and **country** options of the Language business attribute values. You can configure the values for the **language** and **country** options under the Language business attribute values using instructions provided in the [Configuring language and country for WhatsApp structured messages](#) section.

Important

- This feature is only available starting with the version 9.0.001.08 and later.
- Values of the language KVP are not updated in **Genesys JSON** under standard response if you cut, copy, paste, or import a standard response with **Genesys JSON**.
- Values of the language KVP are not updated in **Genesys JSON** under standard response if you modify the values for the **language** and **country** options under the Language business attribute values.
- Genesys recommends that you delete the language KVP in **Genesys JSON** under standard response, click **Edit JSON**, and click **Save** to change the values of the language KVP. The **JSON Part** field gets updated with the correct values for the language KVP.

For more information, refer to the [How to Configure Languages](#) section of the Chat Server Administration guide.