USER GUIDE · VERSION 1

Broadcasting server

Send WhatsApp messages to many customers at once from a spreadsheet, using message templates WhatsApp has approved, and see what was delivered and read.

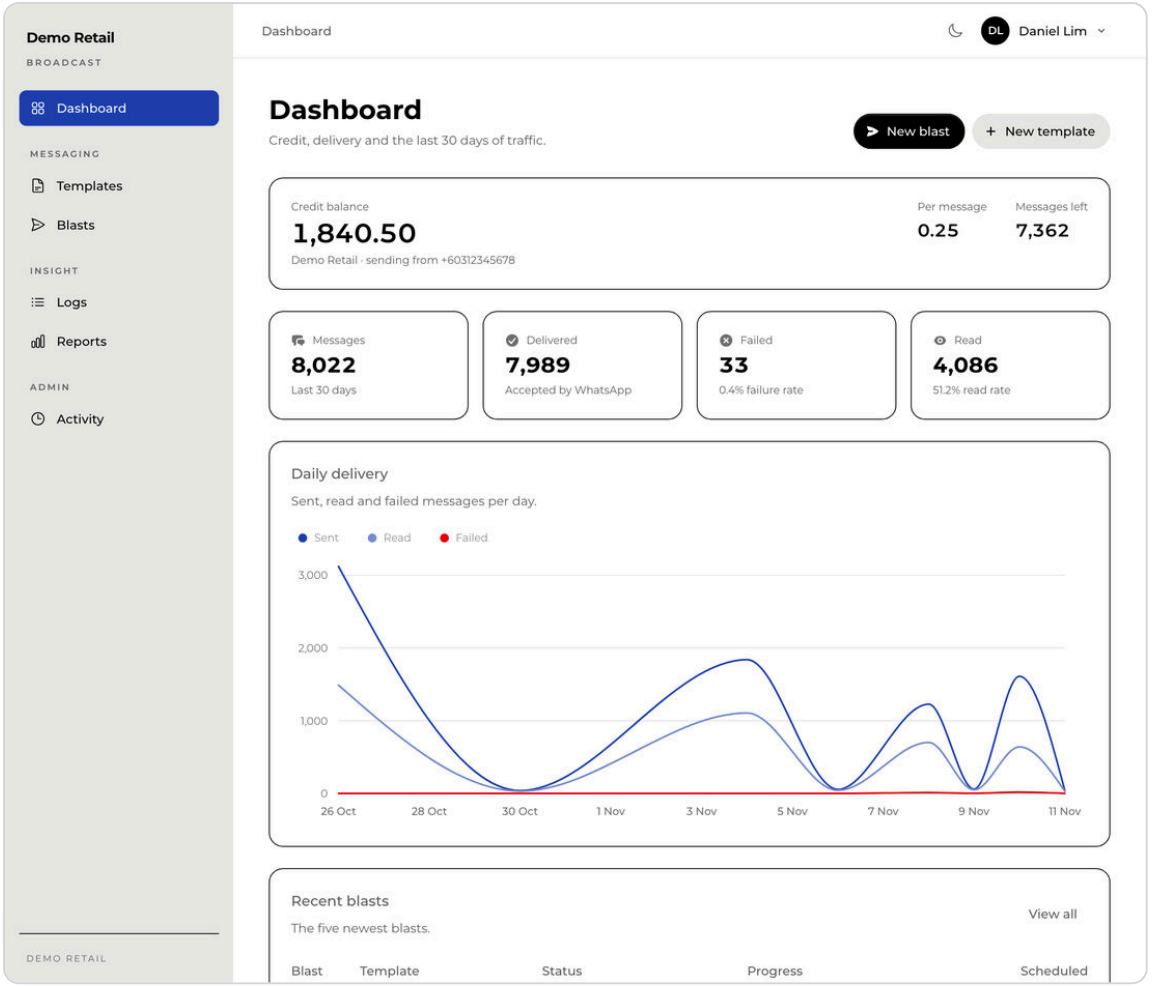
1. What it is for
2. Find a message template
3. Write or change a template
4. Send a blast
5. Follow a blast and resend failures
6. Check one customer's messages
7. See how messages performed
8. Add and remove people
9. See who did what, and set the branding

What it is for

For: Everyone

Broadcast sends WhatsApp messages to your customers in bulk: a promotion, a new outlet opening, a reminder about their points. You upload a customer list as a spreadsheet (a CSV file), pick a message, check it, and it goes out. Afterwards you see how many messages were delivered, read or failed.

The same sending service also carries the single messages other modules send, such as one-time codes. Those show up here under **Logs** and **Reports**.



A few words used on the screens

- **Template**: a message whose wording WhatsApp has approved in advance. WhatsApp only lets a business start a conversation with an approved template.
- **Placeholder**: a blank in a template, written like {{1}}, that each customer's own value fills (their name, their points).
- **Blast**: one sending of one template to a whole list of customers.

- **Meta**: the company that runs WhatsApp. It reviews every template.
- **Credit**: what the sending service charges. Every message uses a little credit (**Per message** on the Dashboard). **Messages left** is how many more messages the credit pays for.

Who uses it

Role	Can
Viewer	See templates, blasts, logs and reports. Cannot send or change anything.
Manager	Everything a viewer can, plus write templates, send and cancel blasts, resend failed messages, and see **Activity**.
Super admin	Everything, plus add people under **Users** and change **Branding**.

Signing in

Open Broadcast from the Portal home page, or sign in with your phone number. Only people a super admin has added under **Users** can sign in.

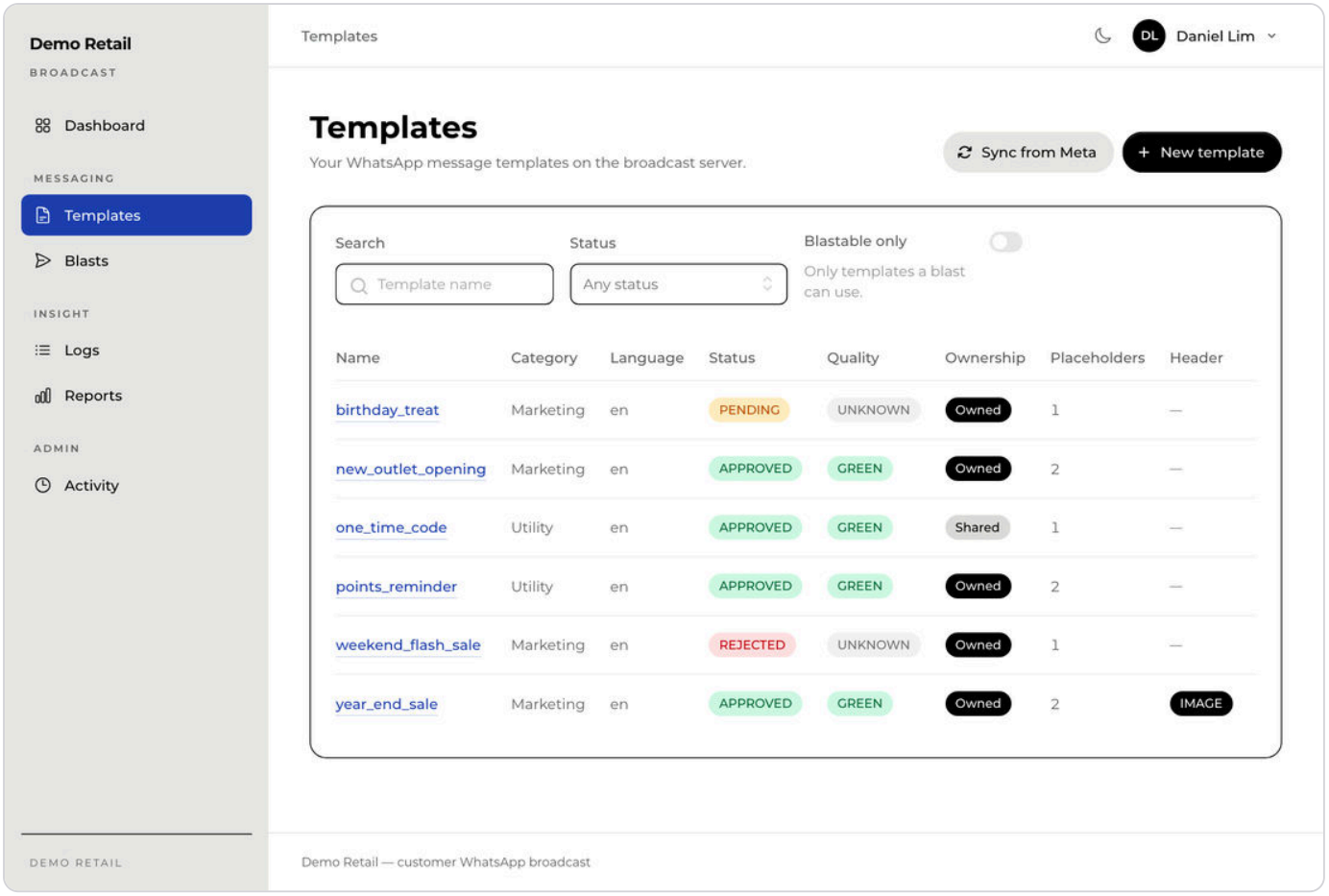
What it needs

- An account with the outside WhatsApp sending service, with credit on it. Credit is topped up with that service, not in Broadcast. If the Dashboard says **Credit is running low**, ask whoever manages that account to top it up.
- If the Dashboard says **Sending is switched off**, no WhatsApp number is connected to your account at the sending service and nothing can go out. Ask your technical team.

Find a message template

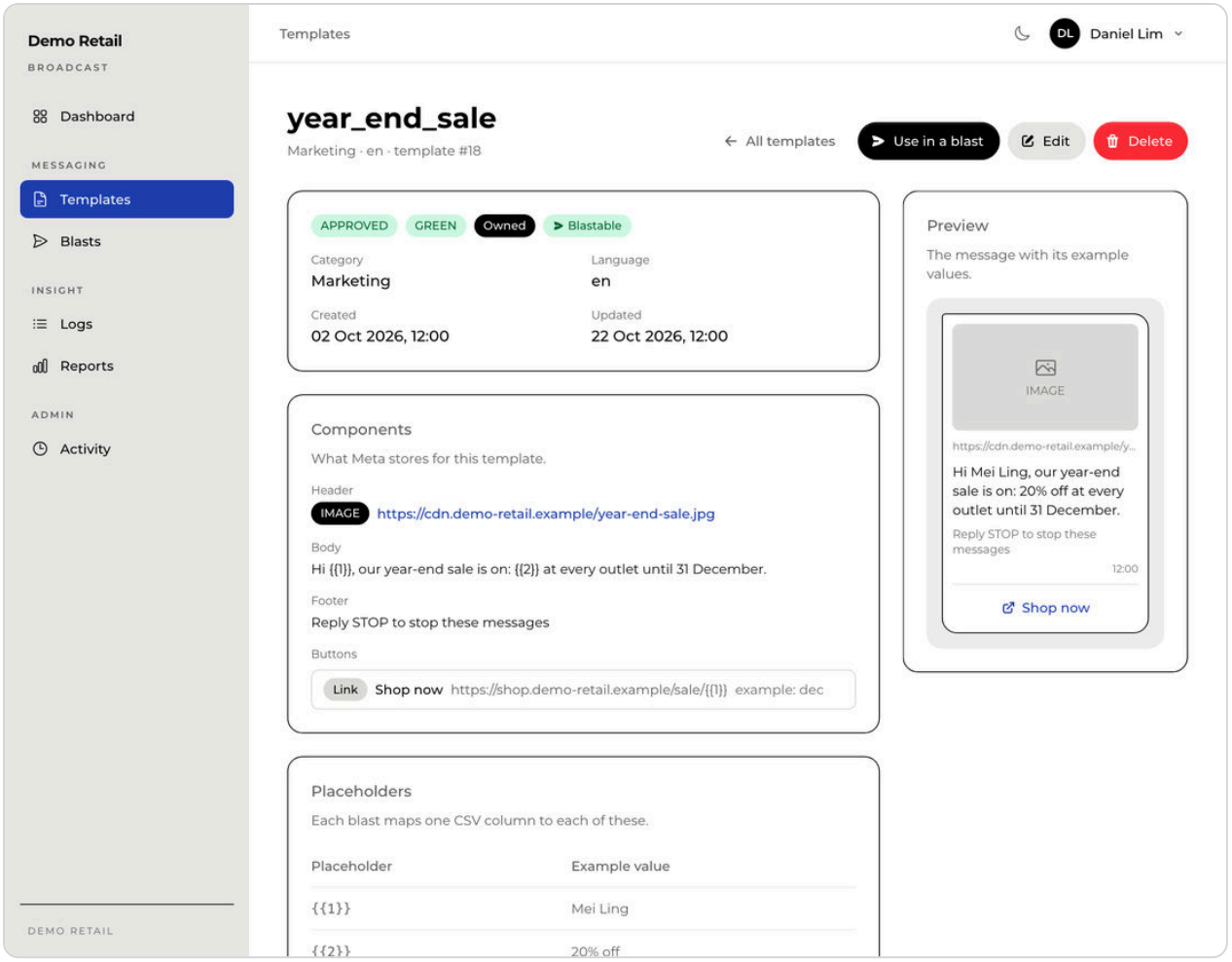
For: Managers and viewers

Open **Templates** in the menu on the left.



- **Status** is Meta's answer: **APPROVED** (ready to use), **PENDING** (still being reviewed) or **REJECTED** (not allowed; write a new one).
- **Quality** is how customers react to it. **GREEN** is good. Templates that many people block or report lose quality, and Meta can stop them.
- **Ownership**: **Owned** templates are your company's own. **Shared** ones are set up by the sending service for you to use; you cannot edit or delete them.
- Switch on **Blastable only** to see only the templates you can send in a blast.

Press a template's name to open it. The **Preview** on the right shows the message as a customer would see it, with example values in the blanks.



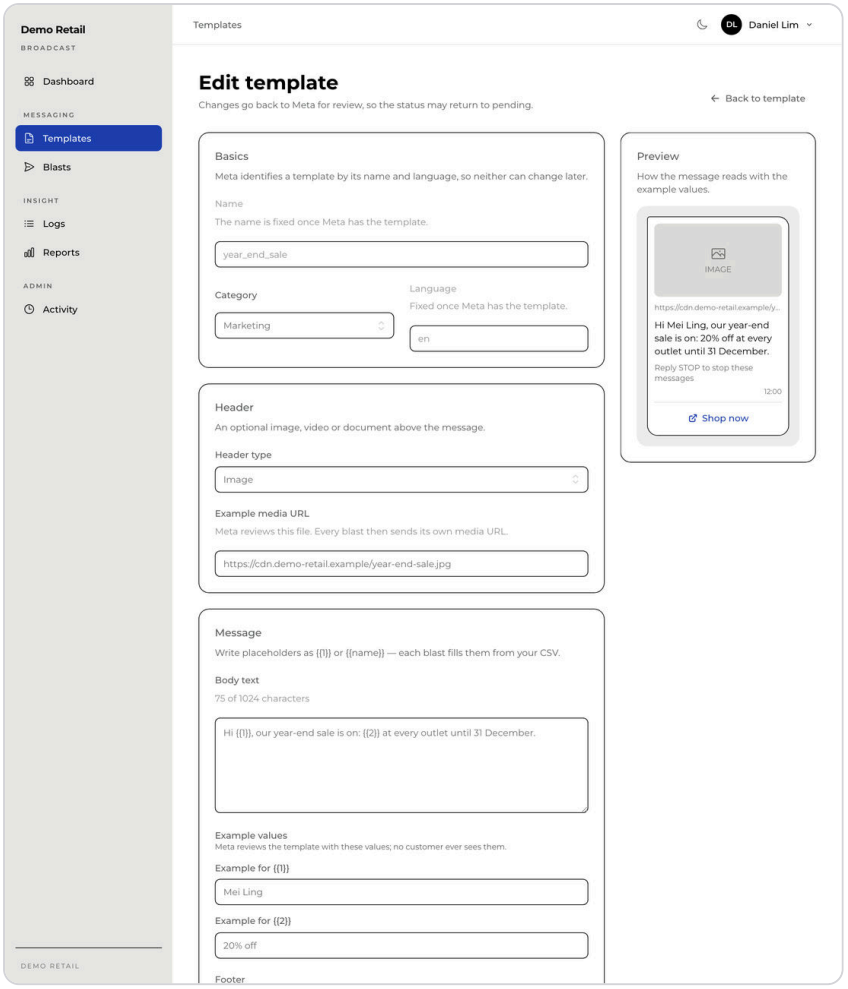
From here, **Use in a blast** starts a new blast with this template already chosen.

Sync from Meta (on the Templates list) fetches the latest status of every template from Meta. Use it when a template has been **PENDING** for a while.

Write or change a template

For: Managers

1. On **Templates**, press **New template**.
2. Under **Basics**, give it a **Name**: lowercase letters, numbers and underscores only (for example year_end_sale). Pick a **Category**: **Marketing** for promotions, **Utility** for information the customer expects, such as a points reminder. The name and language cannot be changed later.
3. Under **Header**, you can add a picture, video or document above the message. Give an **Example media URL** (a web link to a sample file) for Meta to review. Each blast then sends its own file.
4. Under **Message**, write the **Body text**. Put {{1}}, {{2}} and so on where each customer's own value goes, and fill in an **Example** for each one. Only Meta sees the examples.
5. Add a **Footer** if you want one (up to 60 characters, no blanks).
6. Under **Buttons**, add up to three: a quick reply or a link.
7. Check the **Preview** on the right, then press **Send to Meta**.



Meta reviews the template. It shows **PENDING** until Meta answers, usually within minutes but sometimes longer. You can only send it in a blast once it is **APPROVED**.

Change or delete a template

Open the template and press **Edit**, change it, then press **Save changes**. The change goes back to Meta, so the template may show **PENDING** again for a while.

Press **Delete** to remove a template. You cannot delete a template while a blast that uses it is still waiting or sending.

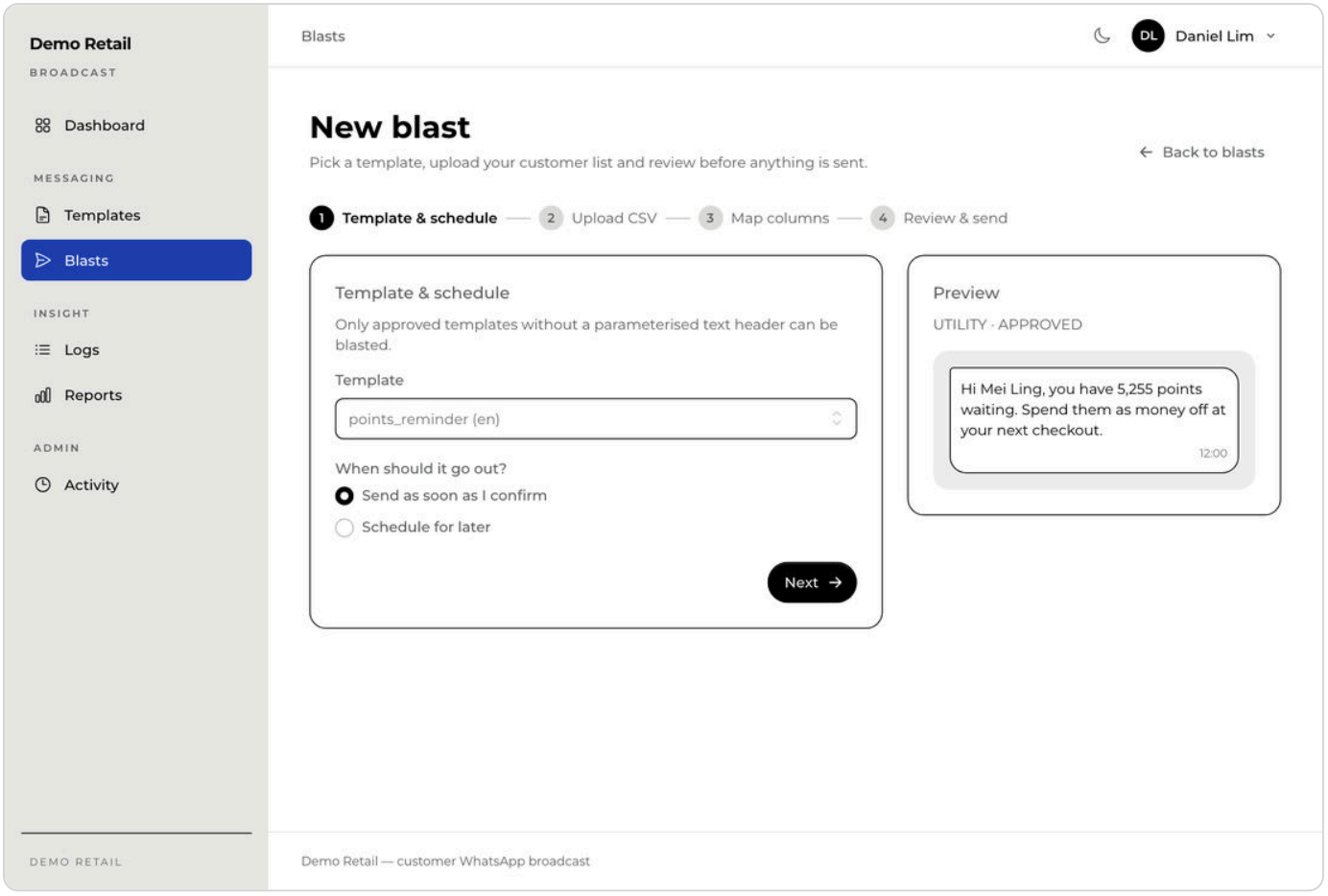
Send a blast

For: Managers

Before you start, prepare your customer list as a CSV file (a spreadsheet saved as CSV). Put the column names in the first row, one customer per row, with a column for the phone number and one for each blank in the template. Press **Download sample CSV** on step 2 for an example. One blast takes up to 10,000 customers.

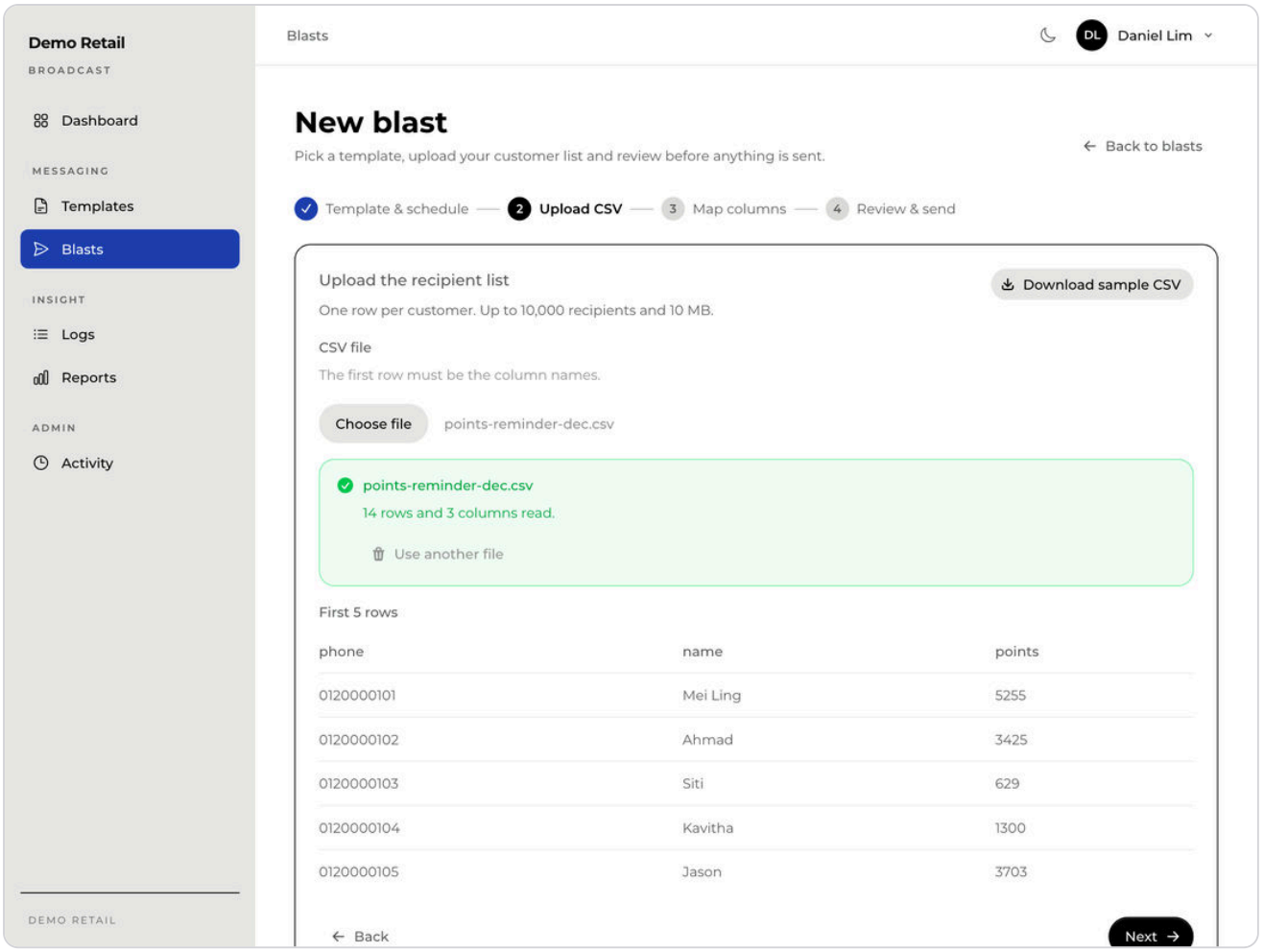
1. Template & schedule

1. Open **Blasts** and press **New blast**.
2. Pick the **Template**. Only approved templates are listed. The **Preview** shows the message.
3. Under **When should it go out?**, choose **Send as soon as I confirm**, or **Schedule for later** and pick the **Date** and **Time**.
4. Press **Next**.



2. Upload CSV

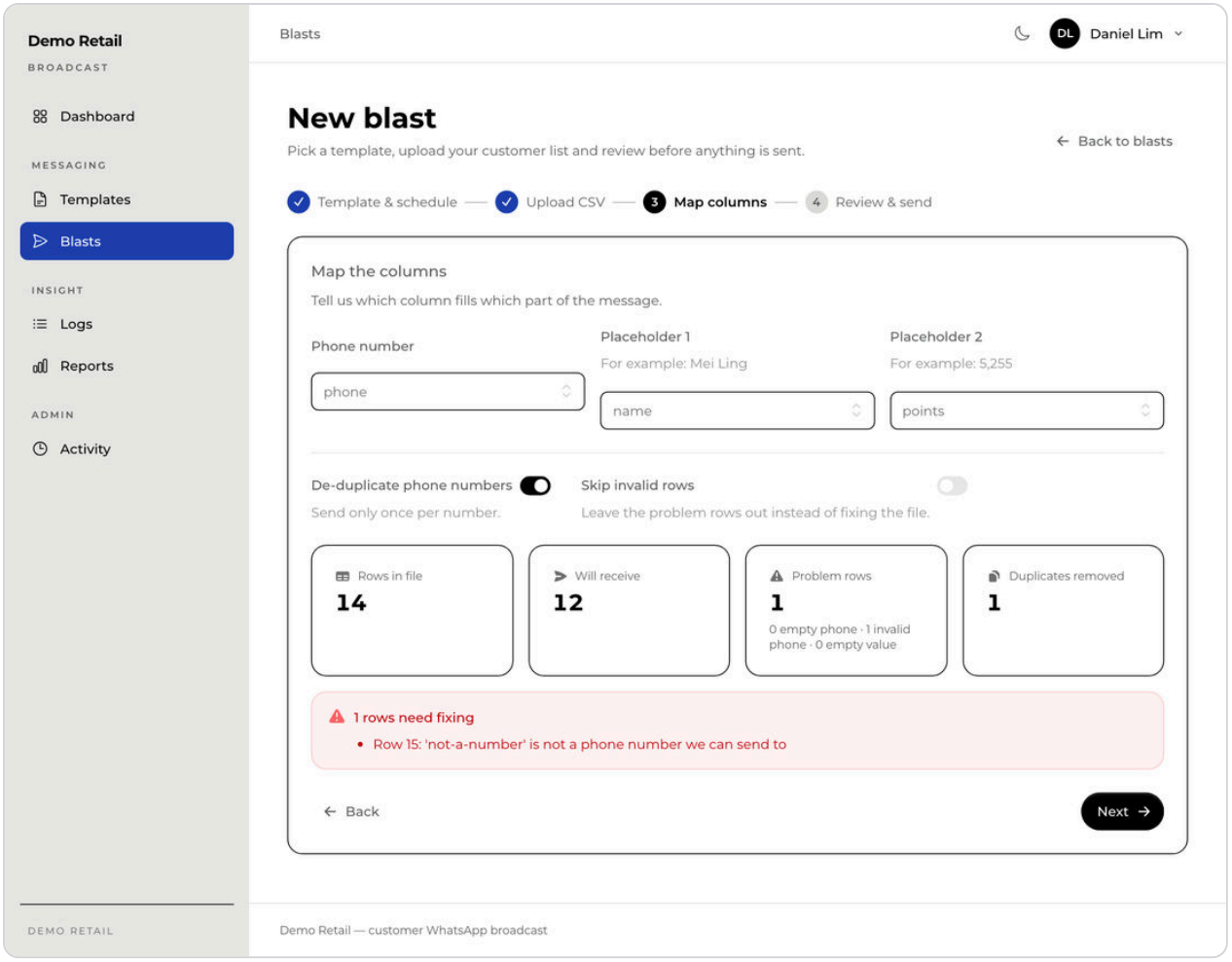
Press **Choose file** and pick your CSV. Broadcast reads it and shows the first 5 rows. Check they look right, then press **Next**. To pick a different file, press **Use another file**.



3. Map columns

Tell Broadcast which column holds the **Phone number** and which column fills each blank (**Placeholder 1**, **Placeholder 2**). The boxes show how many rows were found, how many customers **Will receive** the message, and any **Problem rows**.

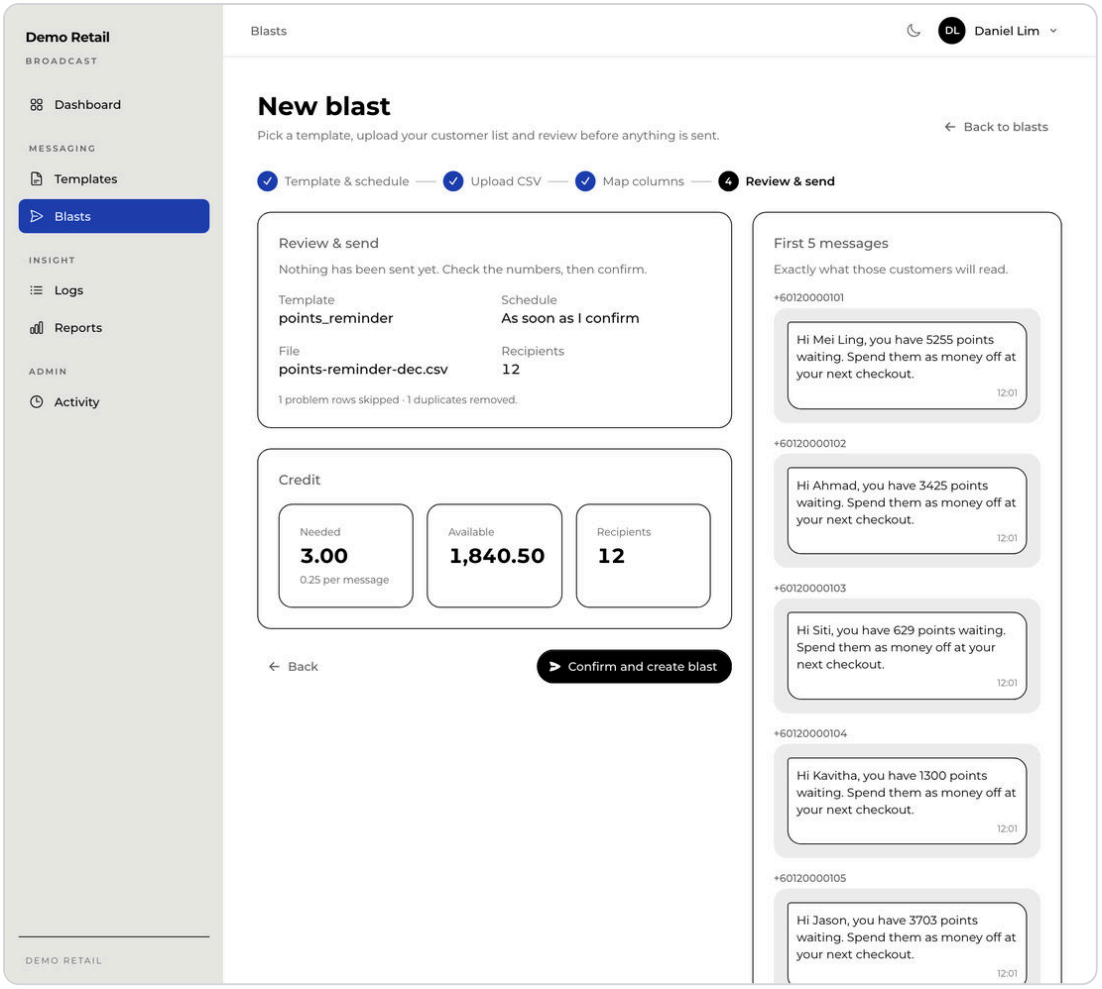
- **De-duplicate phone numbers** sends only one message per number. Leave it on.
- If some rows have a problem (for example a phone number that is not a number), either fix the file and upload it again, or switch on **Skip invalid rows** to leave them out.



4. Review & send

Nothing has been sent yet. Check the template, the schedule, the number of customers, and the **Credit** the blast **Needed** against what is **Available**. On the right, **First 5 messages** shows exactly what those customers will read.

When it is right, press **Confirm and create blast**.



If the credit is not enough for the whole list, the screen says **Not enough credit for the whole list**: messages stop once the balance runs out. Top up first, or send to a shorter list.

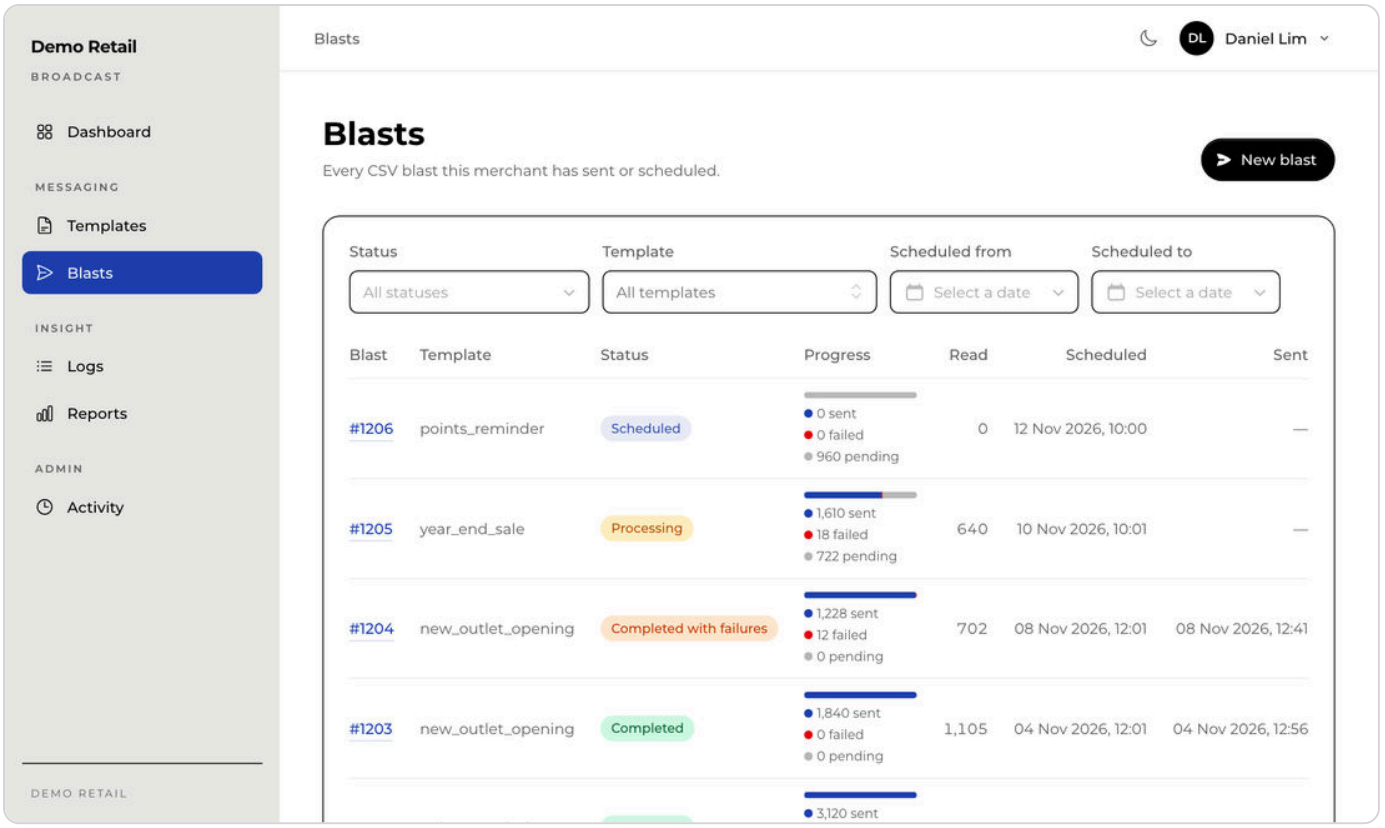
After you confirm, the page says **This list has already been sent**. Press **Open blast #…** to follow it. Do not confirm again.

BROADCASTING SERVER

Follow a blast and resend failures

For: Managers and viewers

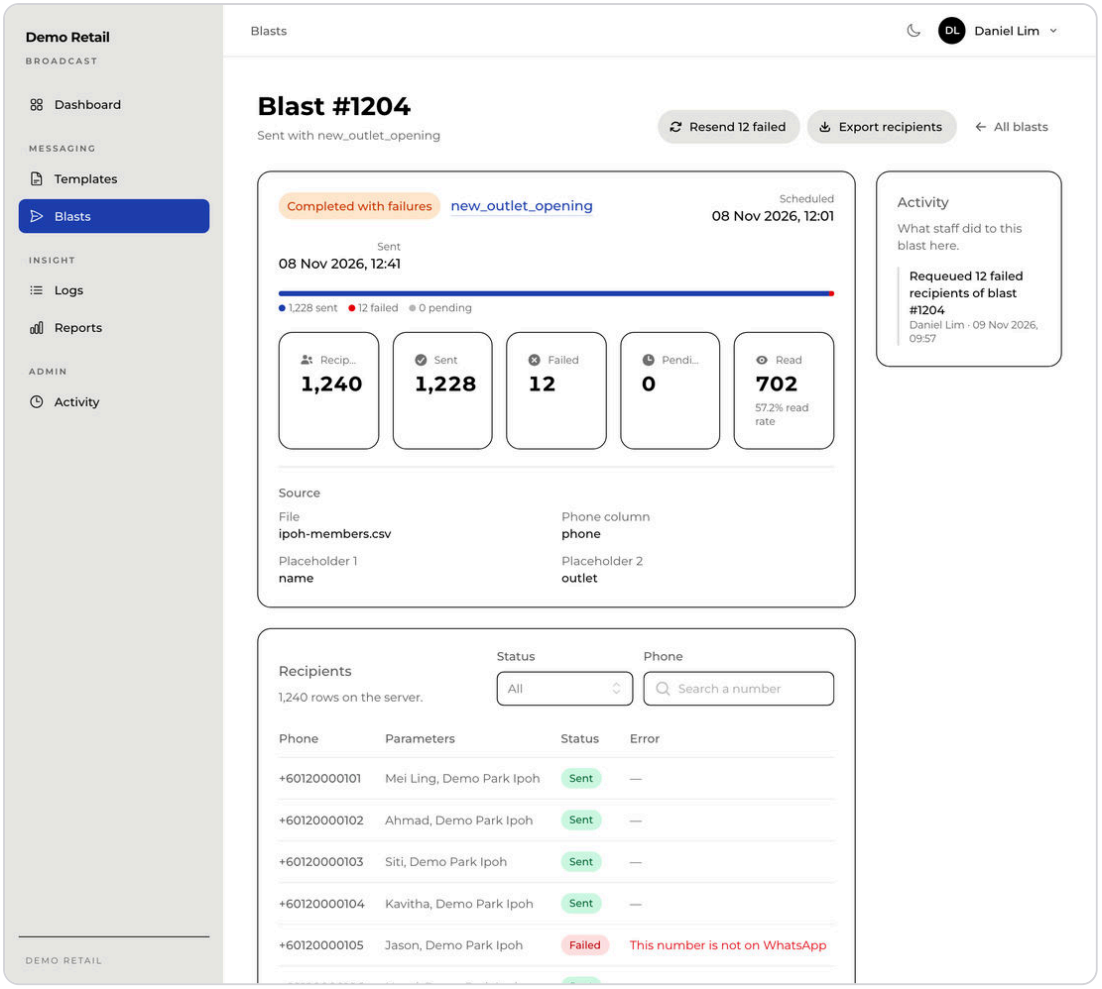
Open **Blasts** to see every blast, newest first, with how many messages were sent, failed and are still pending.



The **Status** of a blast:

Status	Meaning
Scheduled	Waiting for its time. It can still be cancelled.
Processing	Sending now. The page updates by itself every few seconds.
Completed	Every message went out.
Completed with failures	Finished, but some messages could not be delivered.
Cancelled	Stopped before it started.

Press a blast's number to open it.



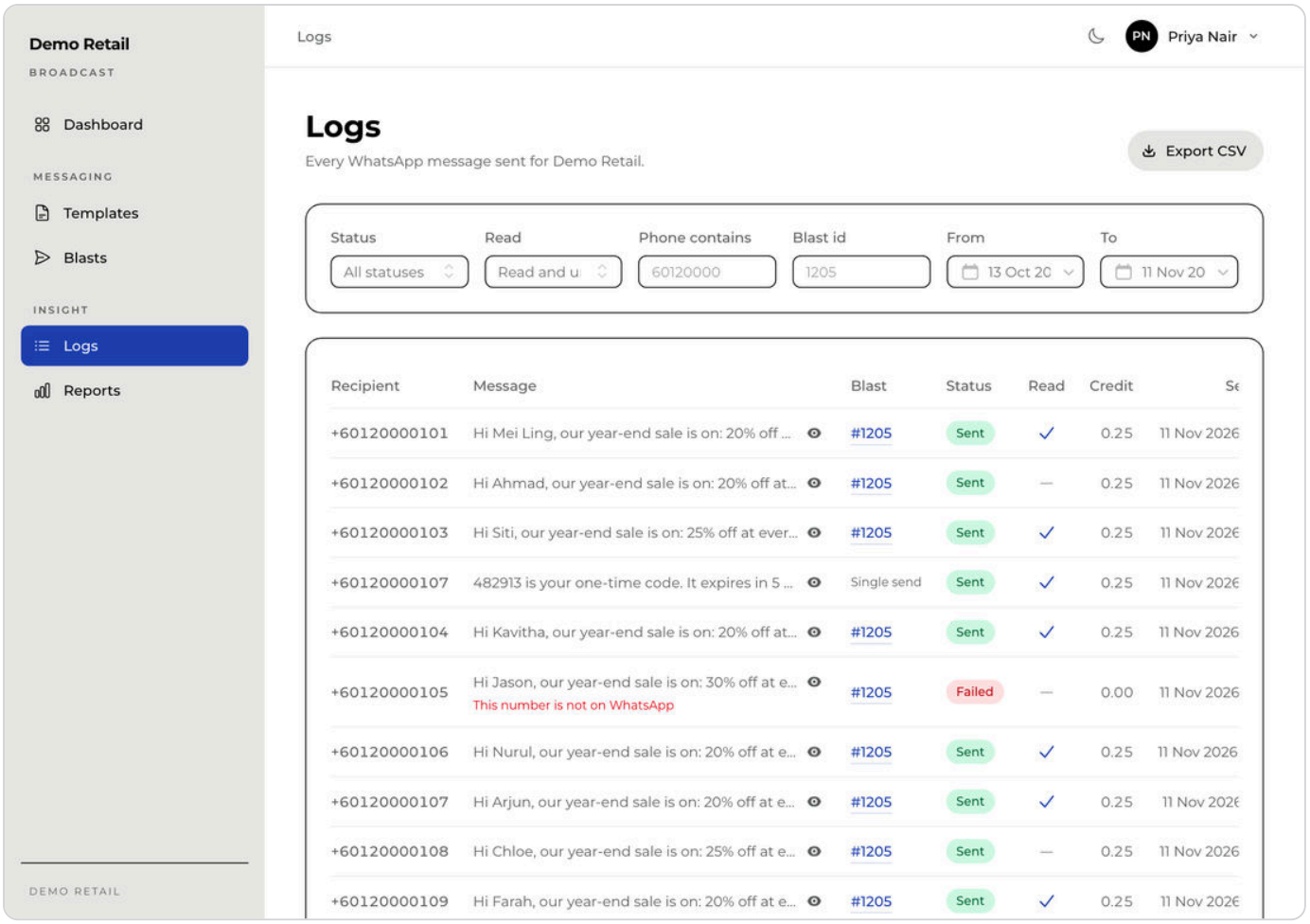
- The **Recipients** list shows each phone number, the values that filled the blanks, and the **Error** for any that failed, such as a number that is not on WhatsApp. Pick **Failed** under **Status** to see only those.
- **Resend … failed** tries the failed messages again. It is shown when some messages failed and the blast is not sending at that moment. It helps when the reason was temporary; a number that is not on WhatsApp will fail again.
- **Export recipients** downloads the list as a CSV file.
- **Cancel blast** is shown only while the blast is **Scheduled**. Press it and confirm; press **Keep it scheduled** to change your mind. A blast that has started cannot be stopped.
- **Activity** on the right shows what staff did to this blast.

Only managers and super admins see the resend and cancel buttons.

Check one customer's messages

For: Managers and viewers

Logs lists every WhatsApp message sent for your company: blast messages, and single messages from other modules such as one-time codes (shown as **Single send**).



To answer "Did this customer get our message?":

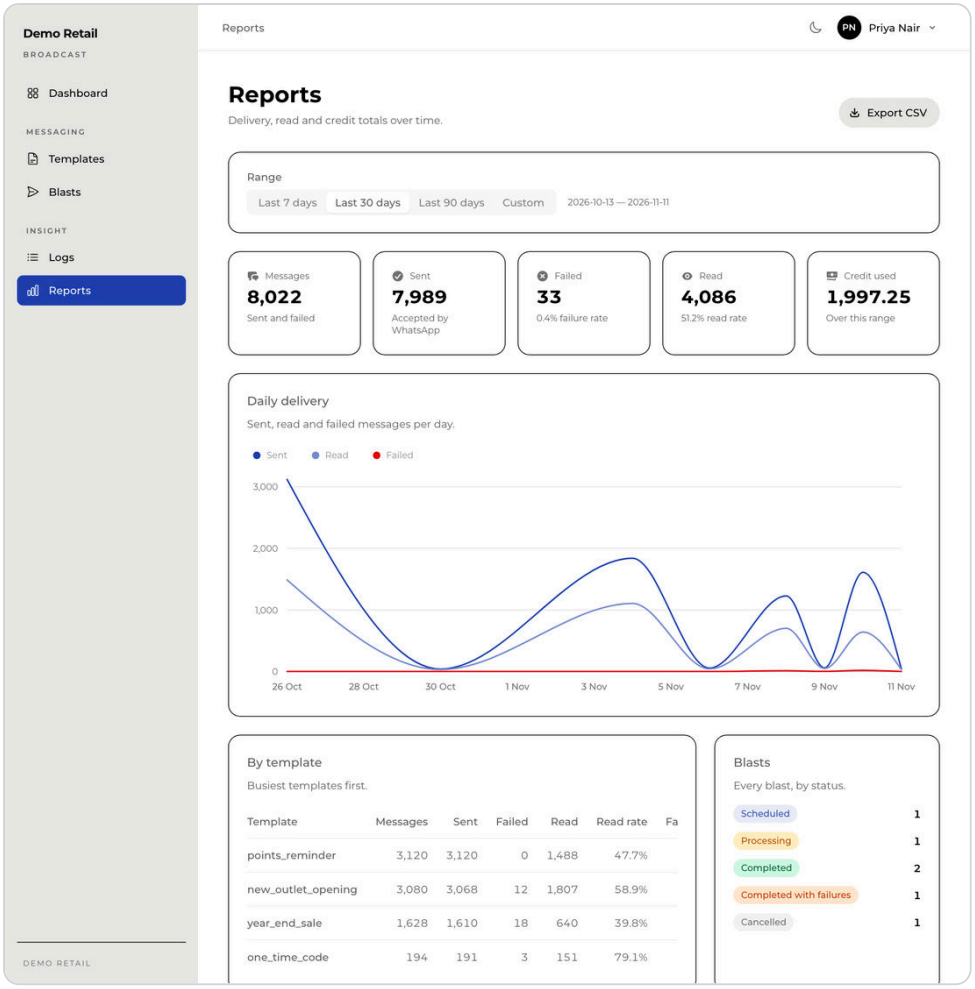
1. Open **Logs**.
2. Type part of their number in **Phone contains**. Set **From** and **To** if you know roughly when.
3. Read the row: **Sent** with a tick under **Read** means they opened it. **Failed** shows the reason in red under the message.
4. Press the eye icon next to a message to see it exactly as the customer saw it.

Other filters: **Status**, **Read**, and **Blast id** (the blast number). **Clear filters** resets them. **Export CSV** downloads what the filters show.

See how messages performed

For: Managers and viewers

Open **Reports**. Pick a **Range**: **Last 7 days**, **Last 30 days**, **Last 90 days** or **Custom**.



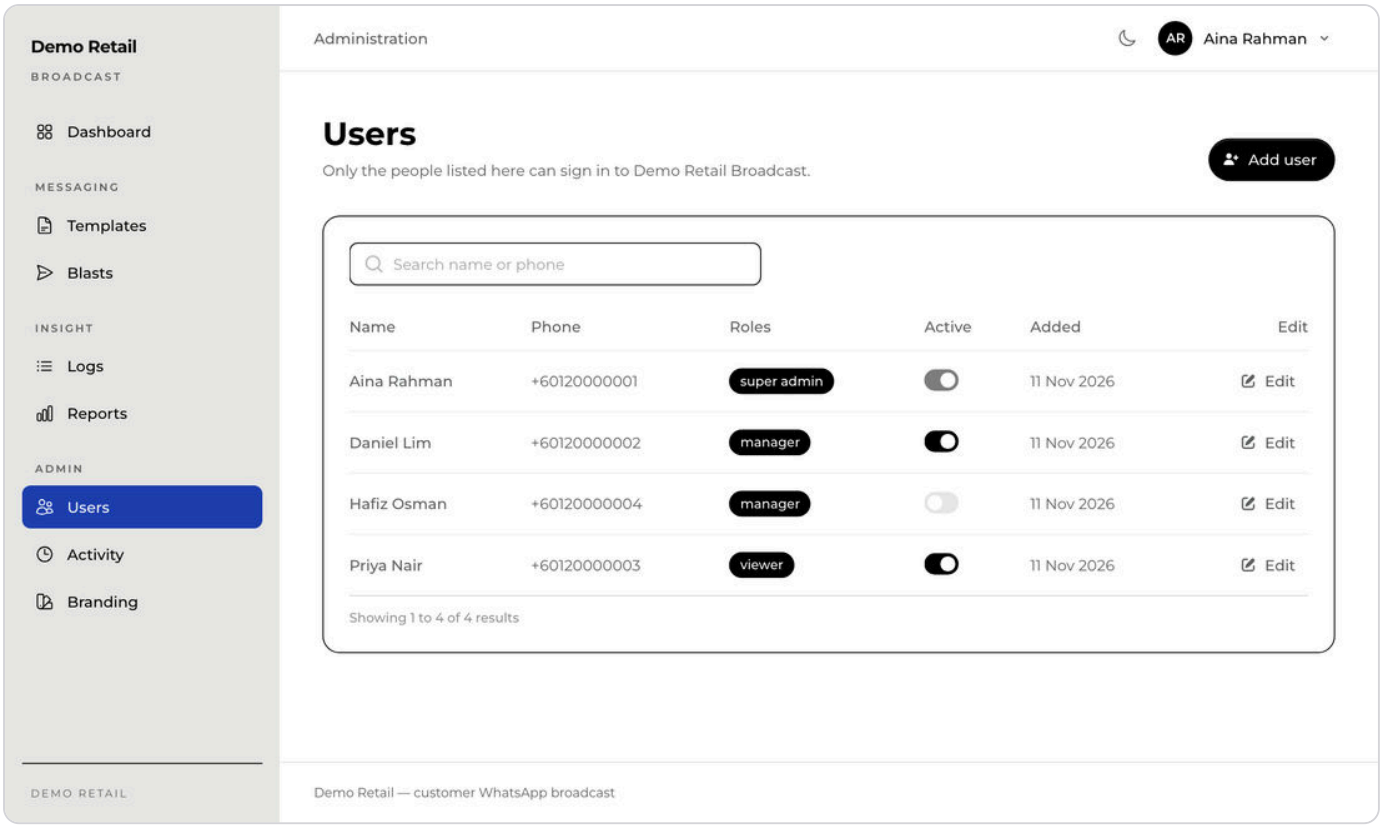
- The boxes at the top give the totals for the range. **Read** shows the read rate: of the messages delivered, how many were opened. **Credit used** is what the range cost.
- **Daily delivery** charts sent, read and failed messages per day.
- **By template** shows which messages were sent most and how well each was read. A low read rate can mean the message is not interesting enough, or is sent at the wrong time.
- **Blasts** counts every blast by status.

Export CSV downloads the figures.

Add and remove people

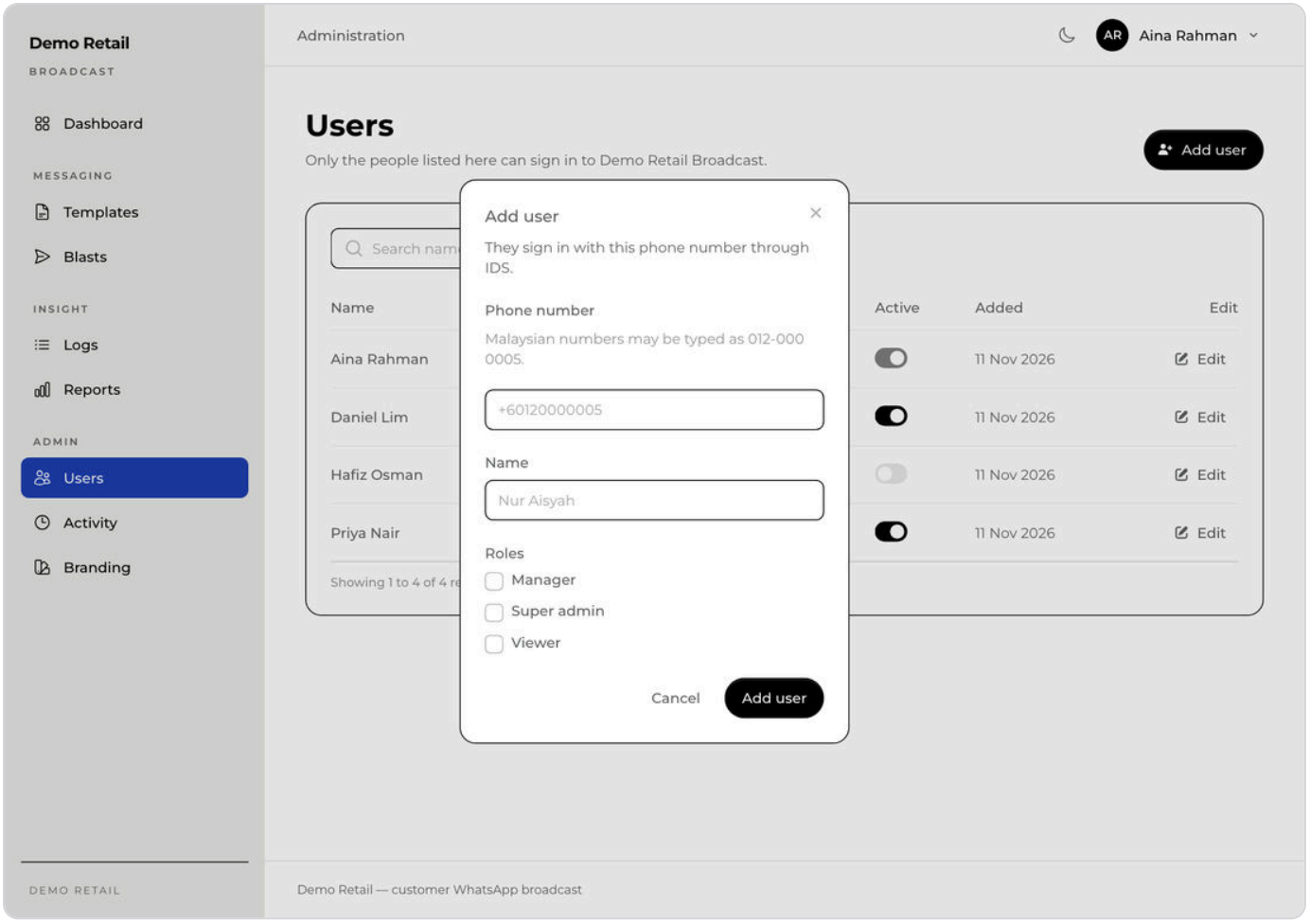
For: Administrators

Only people listed under **Users** can sign in to Broadcast. This page is for super admins.



Add someone

1. Press **Add user**.
2. Type their **Phone number** (the one they sign in with) and **Name**.
3. Tick their **Roles**: **Viewer** to look only, **Manager** to send, **Super admin** for everything.
4. Press **Add user**.



Change or stop someone

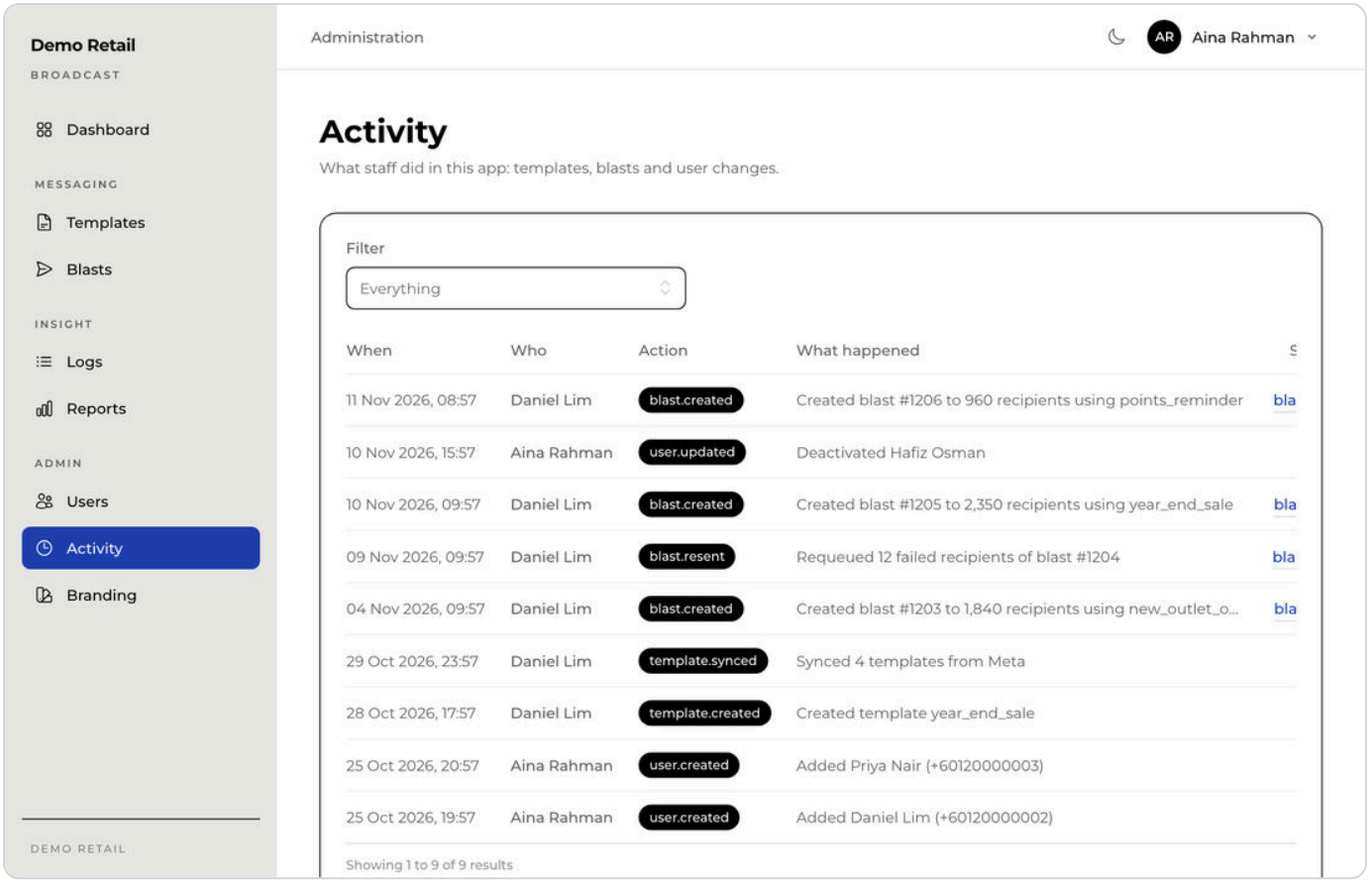
- Press **Edit** to change a person's name or roles, then **Save changes**. The phone number cannot be changed here.
- Switch **Active** off to stop someone signing in, for example when they leave. Switch it on again to let them back.

See who did what, and set the branding

For: Administrators

Activity

Activity lists what staff did in Broadcast: templates written, synced or deleted, blasts created, cancelled or resent, and people added or changed, with who did it and when. Use **Filter** to see one kind only. Managers can see this page too.



Branding

Branding sets how Broadcast looks for your company. Only super admins see it.

- **Company name**: shown in the footer, and in the sidebar when there is no logo.
- **App label**: the short line under the logo in the sidebar.
- **Logo for light backgrounds**, **Logo for dark backgrounds** and **App icon / favicon** (the small picture in the browser tab): PNG, JPG, WebP or SVG, up to 2 MB.
- **Accent colour**: the colour of the selected menu item, links and charts. Pick a dark shade, because white text sits on it.

Press **Save branding** at the bottom.

