

WA Engine — SOP

How this module works

The WhatsApp-sending backbone of the whole app — real-time Inbox, bulk campaigns, automation (sequences, triggers, visual workflows), Business-API template management, and live cost/performance analytics, all through Meta's official WhatsApp Business API.

SECTIONS

● Dashboard Today's send/delivery/read/reply numbers, running campaigns, recent conversations, live Meta billing and cost attribution, and WA number health at a glance.	● Inbox Real-time, two-way conversations with every contact — respects Meta's 24-hour customer-service window, with AI reply-suggestions, templates, media, and reactions.
● Campaigns Bulk-send to leads, groups, a CSV upload, or a manual list through a guided 5-step wizard — message, media, schedule, and anti-spam pacing all in one flow.	● Automation Always-on sequences and rules — Nurture follow-ups, Invoice-Recovery reminders, behavioral triggers, and a drag-and-drop Visual Workflow builder for custom trigger → condition → action chains.
● Templates Create and manage Meta-approved WhatsApp Business templates (and Groups) — required for any message sent outside the 24-hour window.	● Analytics Live-updating send/delivery/read/reply trends and per-campaign performance, refreshed automatically every 15 seconds while the tab is open.

STEP-BY-STEP WORKFLOW

- 1 Verify the Meta WhatsApp Business API connection in Settings — nothing else in this module works until it shows as genuinely connected.
- 2 Create or select an approved message template in the Templates tab — Meta requires an approved template for any message sent outside an open 24-hour conversation window.
- 3 Send a campaign through the wizard — pick your contacts from Leads, a Group, a CSV upload, or enter them manually, then pick your message and schedule.
- 4 Monitor real replies as they come in from the Inbox — every campaign reply and direct conversation lands here in real time.
- 5 Set up ongoing automation in the Automation tab — nurture sequences, invoice-recovery reminders, and behavioral triggers keep working without you sending anything manually.

CONNECTIONS

●  Leads The WhatsApp button on every lead opens a send modal that goes through this same sending pipeline, so every message is tracked in one place.	●  Follow-up Its WhatsApp actions (Objections, AI Message Generator, Template Picker) all route through the same shared send pipeline as this module.
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● 📄 Nurture Nurture-sequence steps marked as a WhatsApp action send automatically through this module's sending service.	● 📄 Proposals Sending a proposal over WhatsApp uses this same pipeline, with a personal WhatsApp-link fallback if the direct send isn't possible.
● 📄 Auto-Pilot Five automation rules — welcome messages, follow-up reminders, invoice notices, payment reminders, and payment thank-yous — all send through this module automatically.	