

GREY**CUBE**
technologies



Whatsapp <> **ERPNext**

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Benefits

Alert/ Inform Customers, Suppliers / stakeholder in real time during the operations

High Brand Impact

Focus on productive work than just giving status updates

Send Manual / Auto Notification

Proactive Communication

SUPER FAST Communication , Transparency

Features

Send Auto Notification to Customer, Supplier, Employees from ERPNext docs

Send Manual Notification to Customer, Supplier based on pre-approved templates.

Send Invoices, Delivery Notes, Payments Receipt, Purchase Orders in desired Print formats

One click message ready with attachments.

Send Documents like Brochures/ Quotation to potential customers.

What is Required ?

1. GreyCube Wati Whatsapp ERPNext App : jignesh@greycube.in
2. Whatsapp Business Account
3. Wati Whatsapp Account to purchase Whatsapp messages (e.g., to send SMS, one buys

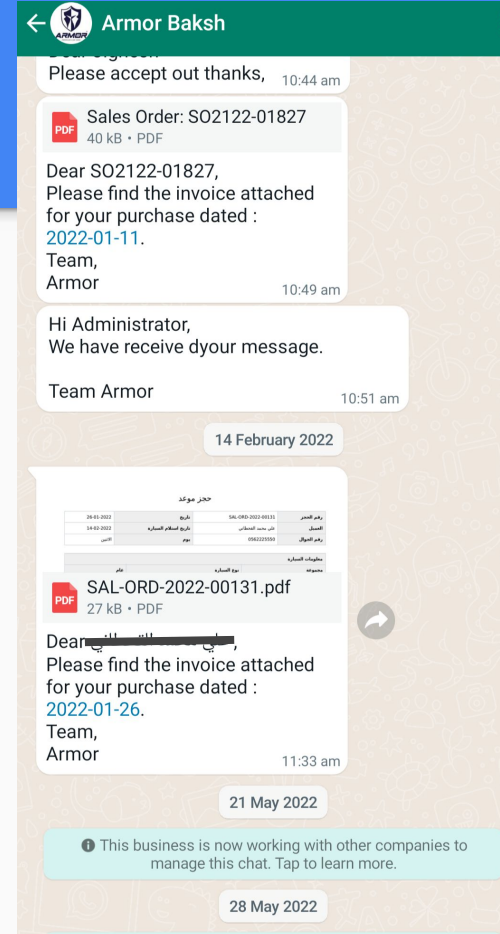
SMS from SMS Gateway) : <https://www.wati.io/whatsapp-api-pricing-india/>

How it works



ERPNext

Wati Whatsapp
Approved
Templates



Send Whatsapp from doc itself

E > Accounting > Sales Invoice > **Send from document**

Search or type a command (Ctrl + G) | Help | A

Eternity Power Solutions Private Limited • Overdue

Connections

Payment

- Payment Entry +
- Payment Request
- Journal Entry +
- Invoice Discounting +
- Dunning +

Subscription

- Auto Repeat +

Reference

- Timesheet
- Delivery Note
- 1 Sales Order
- POS Invoice +

Attachments

Attach File +

Reviews

Shared With

Menu

- Create
- View
- <
- >
- Print
- ...
- Cancel

Returns

- Sales Invoice

- Send Whatsapp
- Send SMS
- Print
- Email ⌘+E
- Jump to field ⌘+J
- Links
- Duplicate
- Copy to Clipboard
- Reload

Send Customize / Personalize Whatsapp along with PDF (Print format)

E

> Education > Fees > EDU-FEE-2022-2023

≡

Aarik Bafna

• Overdue

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

New WhatsApp Message

To Mobile *

91921XXXX429

Whatsapp Template *

fee

Message

Kindly pay the School fees of your ward Aarik Bafna GR No.EDU-STU-2022-01724.Fee payable amount 15745. Fees can be paid online through Vidyodaya mobile app. Fees can also be paid through cheque/credit/debit cards at the fee counter. Timings for fee payment from 8.00 am to 12 Noon.000000

Send

Set Auto Notification on Various Events with/ without Print

E

> Notification > Invoice Whatsapp

Q Search or type a command (Ctrl + G)

🔔

Help ▾

A

≡ Invoice Whatsapp

• Enabled

<

>

🖨

...

Save

👤 Assigned To

+

📎 Attachments

Attach File +

☆ Reviews

+

👥 Shared With

+

🏷 Tags

Add a tag ...

📄 0 · 💬 0

FOLLOW

☒ Enabled

Channel *

Wati Whatsapp

Wati Whatsapp Template *

invoice_1

Filters

Document Type *

Sales Invoice

☐ Is Standard

Send Alert On *

Submit

☐ Send System Notification

If enabled, the notification will show up in the notifications dropdown on the top right corner of the navigation bar.

3 Step Setup

1. Get Wati Whatsapp API Key from wati.io
2. Click on Sync Wati Templates ,to auto fetch all templates into ERPNext
3. Map the variables in the message with ERPNext DocType fields. (Check in the next slides) & Preview the Message with any Record

Step 1: Get Wati Access Token, API Endpoint from Wati & Set in ERPNext



Q Search or type a command (Ctrl + G)

Wati Whatsapp Settings

 Assigned To



 Attachments

Attach File +

☆ Reviews



 Shared With



Access Token

eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJqdGkiOiJmNThtYXQ5MS03ZGJLTQwM2MtOTZlZS01NzU4NGI3NjFkMTUiLCJ1bmVudWVfcmFuZC5ueWFuZGhhbS5vcncciLCJuYW1laWQiOiJhZG1pbkBzcmluLnblhmRoYW0ub3JnlwiZW1haWwiOiJhZG1pbkBzcmluLnblhmRoYW0ub3JnlwiYXkvMTkvMjAyMiAwMzo1NzoyOSIsImR5cy5kbWUuOmxMTI2MSIsImh0dHA6LzYyZW1hbnBvZDQwMDVmdC5jb20vd3MvMjAwOC8wNi9pZGVuZS50dC5lbi6kFETUOSVNUUkFUT1liLCJleHAiOiJ1MzQwMjMwMDgwMCwiaXNzIjojQ2xhcmeVfQUkiLCJhdWQiOiJDbGFyZV9BSSJ9.RmxG5ZE2Jlkff4cuuYJ1-Ab-14pA

API Endpoint

live-server-11261.wati.io

Step 2 : Click on Sync Wati Template

Wati Whatsapp > Wati Whatsapp Template

Search or type a command (Ctrl + G)

Help

Wati Whatsapp Template

Sync Wati Templates

List View

+ Add Wati Whatsapp Template

Filter By

Assigned To

Created By

Edit Filters

Tags

Show Taas

ID	Category	Status	Linked Doctype	Is Default Template	Last Updated On
<input type="checkbox"/> ID	Category	Status	Linked Doctype		19 of 19
<input type="checkbox"/> fee	ALERT_UPDATE	APPROVED	Fees	<input checked="" type="checkbox"/>	- 18 h 0
<input type="checkbox"/> new_chat_v1	AUTO_REPLY	APPROVED		<input type="checkbox"/>	- 1 w 0

Step 3 : Map Whatsapp Message Template with ERPNext DocType & fields



> Wati Whatsapp > Wati Whatsapp Template > delivery_note_1

Q Search or type a command (Ctrl + G)



Help ▾



≡ **delivery_note_1**

• Not Saved



Save

♥ 0 · 💬 0

FOLLOW

Amzy edited this
6 months ago

Luxmi Sharma created this
7 months ago

Parameters

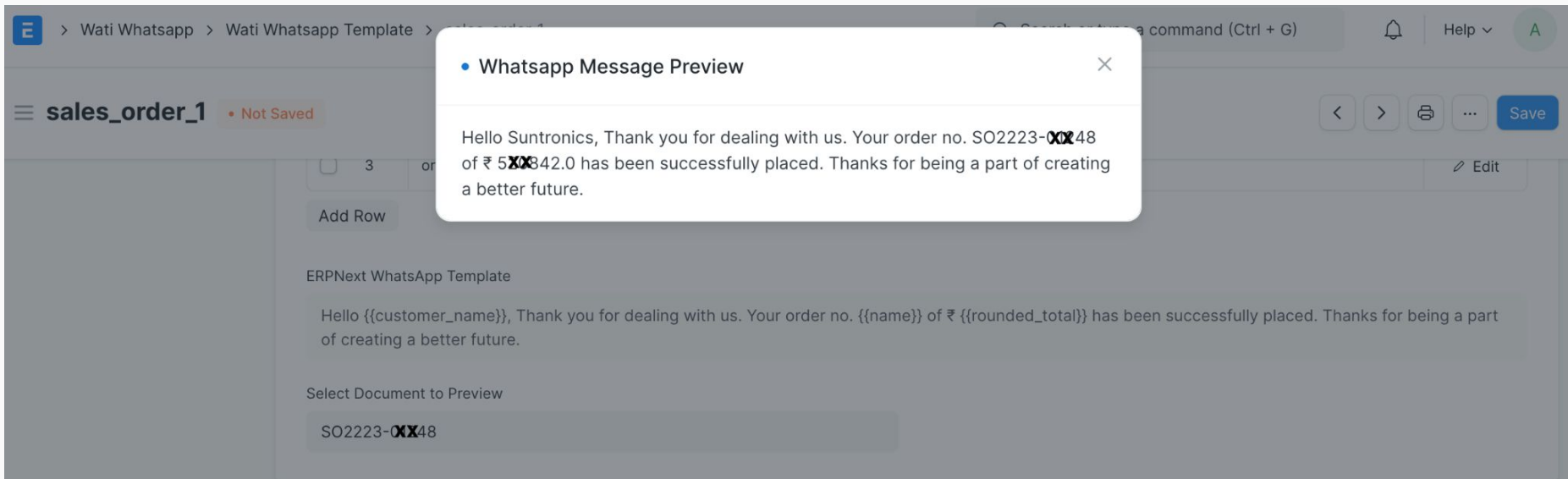
<input type="checkbox"/> No.	Parameter Name	Parameter Value	
<input type="checkbox"/> 1	customer	{{customer}}	Edit
<input type="checkbox"/> 2	transporter	{{transporter}}	Edit
<input type="checkbox"/> 3	transport_receipt_number	{{transport_receipt_number}}	Edit
<input type="checkbox"/> 4	link_to_doc	{{media_link}}	Edit

Add Row

Body

Hello {{customer}}, your order from Adventure Enterprise| is on its way with {{transporter}} and tracking no is {{transport_receipt_number}}. Thank you for dealing with Amrut Energy.

Preview Whatsapp Message



Note :

Any field which has **Phone** in Options will be shown in Recipient List in Notification DocType

Any field which has **Phone** in Options will be auto picked for Manual WhatsApp Pop-up

Setup in just 1 hour, Go Get It



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