

WhatsApp Business Setup Guide

This guide takes you through setting up a complete, professional WhatsApp Business profile in one afternoon. No tech skills needed.

Step 1 - Download WhatsApp Business

- â€¢ Download 'WhatsApp Business' from the App Store or Google Play (it is a separate app from regular WhatsApp).
- â€¢ Register with your business phone number. Use a dedicated number if possible.
- â€¢ Verify your number with the SMS code.

Step 2 - Set up your Business Profile

- â€¢ Business name: use your official business name. This shows on every chat.
- â€¢ Category: pick the closest match (Retail, Professional Services, Education, etc.).
- â€¢ Business description: write 2-3 lines â€¢ what you do, who you help, where you are.
- â€¢ Profile photo: use your logo or a clear professional photo. Square crop, 500x500px minimum.
- â€¢ Website, email, address, and hours: fill in all fields â€¢ they appear on your profile page.

Step 3 - Set up Auto-Replies

- â€¢ Greeting message: sent to customers who message for the first time. Example: 'Welcome to [Business Name]. How can we help you today?'
- â€¢ Away message: sent when you are offline. Include your hours and when they will hear back.
- â€¢ Quick replies: save long messages as shortcuts. Type /invoice to send your full invoice message instantly.

Step 4 - Set up your Catalogue

- â€¢ Add your top 5-10 products or services to the catalogue. Include name, price, description, and a photo.
- â€¢ Customers can browse your catalogue directly on your profile.
- â€¢ Share catalogue items directly in a chat by tapping the paperclip icon.

Step 5 - Label your chats

WhatsApp Business Setup Guide

â€¢ Use labels to organise customers: New Customer, Pending Payment, Order Complete, Follow Up. Complete, Follow Up.

â€¢ Tap and hold any chat to add a label. Filter chats by label from the main screen. screen.

Do's and Don'ts

â€¢ DO: reply within 4 hours. Fast replies build trust.

â€¢ DO: use broadcast for announcements. Never group customers without permission. permission.

â€¢ DON'T: send unsolicited messages to people who have not contacted you. This causes blocks. causes blocks.

â€¢ DON'T: spam the same message daily. Send offers max twice a month.

Next: open the Message Templates PDF

The next PDF in this kit (message-templates.pdf) has 40+ ready-to-send messages for every situation.