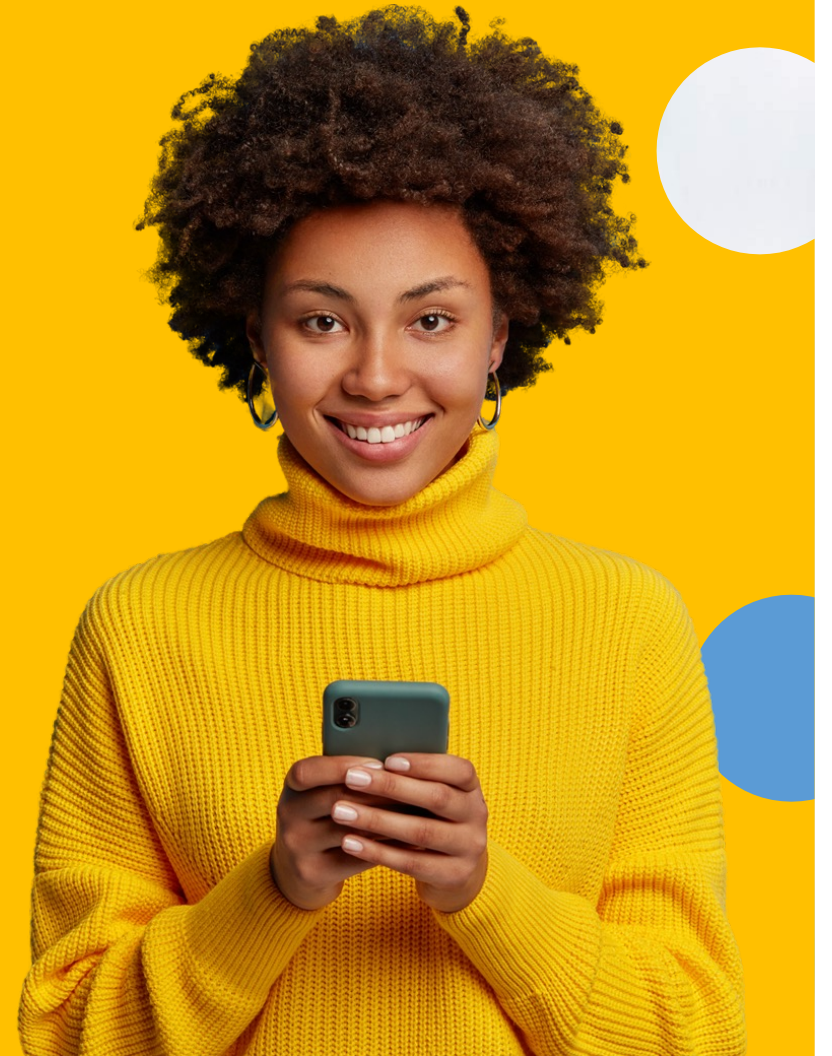




CM.com <>LSQ Integration Steps

03rd October 2022



CM.com <> Leadsquared CRM Integration

Functionalities supported

LSQ Functionalities supported:

- Templated messages
- Custom messages
- Converse

Templated messages format supported:

Header	Body	Footer	Buttons
Text	Text	Text	CTA Website (static &Dynamic)
Image (static &Dynamic)			CTA calling Phone (static &Dynamic)
Document(static &Dynamic)			Quick reply (upto 3)
Video(static &Dynamic)			

Type of Messages supported:

Type of content	Direction
Text	Incoming and Outgoing
Image (static &Dynamic)	Outgoing
Document(static &Dynamic)	Outgoing
Video(static &Dynamic)	Outgoing

Leadsquared CRM APP

After Signing in Go to Apps marketplace-> Installed apps-> WhatsApp Business settings -> Configure

The screenshot displays the Leadsquared CRM interface. At the top, there is a navigation bar with the Leadsquared logo and a language selector (UK). The main navigation menu includes Dashboard, Content, Marketing, Leads, Workflow, Apps, and Reports. The 'Apps' menu is open, showing options for Apps Marketplace, WhatsApp Templates, WhatsApp Reports, and SMS Templates. The main content area is titled 'WhatsApp Business' and features a green WhatsApp logo icon. Below the icon is a 'SETTINGS' button and an 'Installed' status indicator with '33 Installs'. The description states: 'WhatsApp Business Connector enables businesses to engage with more than 1.5 billion users in 180+ countries. It can be used to deliver timely notifications and automated reminders such as purchase receipts, shipping changes or flight times etc. along with capability to send quick message to leads.' The 'Features and Benefits' section lists: 'Convert more leads by sending them a quick message.', 'Send Automated Reminders and Timely Notifications on WhatsApp via Automation Workflow.', 'Send Personalized updates and recommendation based on prospect's preference.', and 'Track Delivery and Read-receipt to re-engage and close opportunities faster.' There are links for 'Help & Support document' and 'Contact Support'. A 'See more apps >' link is also present. The right sidebar shows a list of other installed apps: 'LeadSquared Generic Telephony Connector' (313 Installs), 'Ozonetel V2' (184 Installs), 'Universal Telephony Connector' (154 Installs), 'Exotel V2' (130 Installs), and 'Zoom Meeting'.

Leadsquared CRM: Configuration

Configure WhatsApp Business

[< Back](#)

1 Basic Details

2 Service Provider

3 Authentication

4 Converse Settings

5 Advanced Settings

WhatsApp Business Number*

+91 (India)

X

Account Name*

Cm.com

Allow Lead Generation on incoming message

Lead Source

Organic Search

Next








Leadsquared CRM: Configuration

Configure WhatsApp Business

[< Back](#)

1 Basic Details 2 **Service Provider** 3 Authentication 4 Converse Settings 5 Advanced Settings

Service Provider Selection

 Gupshup	 Infobip	 Zoko
 Kaleyra	 Value First	 Route Mobile
 WhatsApp Client <input checked="" type="checkbox"/>		

Previous

Next

Leadsquared CRM: Configuration

The username password entered has to be used in <https://leadsquared.cmcom.app/> for cm side of configurations

Configure WhatsApp Business

[< Back](#)

1 Basic Details

2 Service Provider

3 Authentication

4 Converse Settings

5 Advanced Settings

Client Base URL*

WhatsApp Number*

Username*

Password*

[Previous](#)

[Next](#)

Leadsquared CRM: Configuration

Configure WhatsApp Business

[< Back](#)



Activity Mapping*

WhatsApp Message ▼

Default WhatsApp Number Field*

Phone Number ▼

Default Country Code* ?

+91 (India) ▼

Enable Rich Media Template Support

Compliance Type OptOut OptIn

WhatsApp Opt-Out* ?

Do Not Call ▼

Previous

Save & Close

Leadsquared CRM: Configuration

[Configure WhatsApp Business](#)

All Numbers Details

Add Number



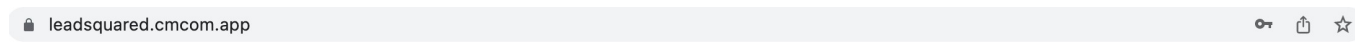
Cm.com

+91-7776XXXX

Enabled

CM.com: Configuration

Use the username password entered entered in Leadsquared WhatsApp configuration page <https://leadsquared.cmcom.app/>



CM.com - LeadSquared WhatsApp Integration

Log In

* indicates a required field

Username *

Username should be the same as the one provided in LeadSquared during installation.

Password *


Password should be the same as the one provided in LeadSquared during installation.


Login

Webhooks Added on CM Channels

Incoming Messages

When you receive a message on this channel we deliver the message to the following destinations. Inbound settings are applicable for messages sent from a customer to your organisation. Inbound settings are only applicable to this channel.

 **Message log**
Click to go to app

 **Webhook - Disabled**
Json - https://6828-2405-201-e01d-f8d8-f507-fea6-69b8-24ee.ngrok.io...

+ Add destination
Deliver incoming messages to an additional destination

HTTP endpoint*

Method **Encoding**

+ Add HTTP Header

Header Key	Header Value
<input type="text" value="Content-Type"/>	<input type="text" value="application/json"/>


```
Request  cURL  Copy
{
  "messages": {
    "msg": {
      "received": "[CREATED_S]",
      "to": "[GSM]",
      "reference": "[REFERENCE]",
      "status": {
        "code": "[STATUS]",
        "errorCode": "[STATUSDESCRIPTION]",
        "errorDescription": "[STANDARDERRORTXT]"
      },
      "operator": "[OPERATOR]"
    }
  }
}
```

1. Enable the auto configured webhook

2. Copy this webhook and paste on the delivery reports sections Channels -> Gateway -> Delivery status Report


CM Whatsapp Templates

Use WhatsApp for developers tab to copy template details to create a template on Leadsquared app

← Bashop.in · Payment Update  🔍 ? 📄 Save

English Message

Languages

Requested 

Arabic
Active





English
Active

Hindi
Active

Language content **For Developers**


Do you want to send out your WhatsApp templates via our API? Head over to the documentation to get started. Whenever you need any information about your template, you can find it right here. [Go to documentation](#)

General

language_code	category_id
en 	Payment Update 
facebook_name	facebook_namespace_id
bashopin 	5-109701-106-460-216-755648847346 

Body

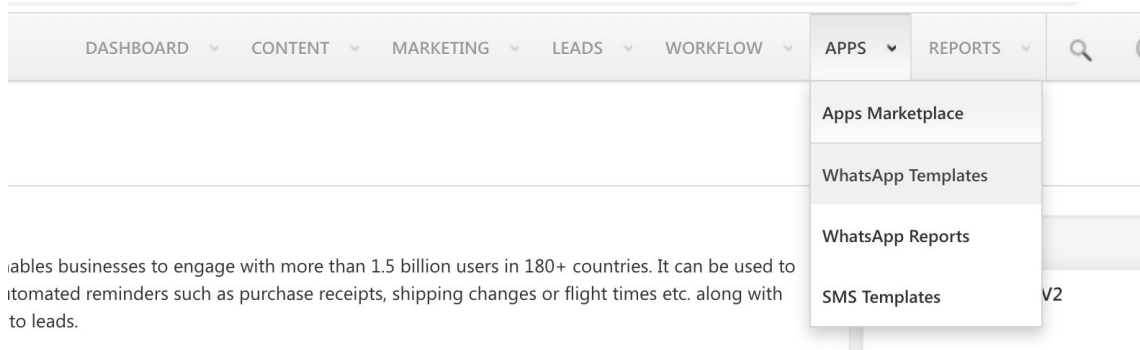
value

Your Recharge for {{1}} has been completed for 

ReplacementField: {{1}}

Leadsquared – Adding whatsapp templates

Step1



Step2

Manage WhatsApp Templates ?



Your message templates has to be approved by WhatsApp before adding them to CRM. You can send the template for submission to your account executive or email us at support@leadsquared.com with details such template name, category, & content. Template approval from facebook may take around 24-48 hours. Please refer to [WhatsApp template guidelines](#) before submission of template for approval.

Search Templates Template Type Account Converse

Template Name	Preview	Action
---------------	---------	--------

Leadsquared – Adding WhatsApp templates

Add/Modify Template ✕

Name

Namespace

Language

Selected Account

Template Type Approved Unapproved

Content

Variable	Object	Field	
{{1}}	Lead	First Name	Customer
{{2}}	Lead	Phone Number	9666122287

Media Template

Available in Converse

Note:

1. Your message templates has to be submitted and approved by WhatsApp before sending message. You can send the template for approval to account executive or support@leadsquared.com with above details.
2. Only Notification and Customer support template are supported, templates containing promotional template will be rejected by WhatsApp
3. Lead & activity field should contain the publicly accessible URL of the media attachment you want to send.

Cancel Save

Leadsquared –WhatsApp templates added

Manage WhatsApp Templates ?



Your message templates has to be approved by WhatsApp before adding them to CRM. You can send the template for submission to your account executive or email us at support@leadsquared.com with details such template name, category, & content. Template approval from facebook may take around 24-48 hours. Please refer to [WhatsApp template guidelines](#) before submission of template for approval.

Template Type Account Converse [Add Template](#)

Template Name	Preview	Action
bashopin	Your Recharge for @{{LEAD:FirstName,}} has been completed for @{{LEAD:Phone,}} successfully.	

Manage Leads ?

Search Leads

Lead Stage	All	Lead Sour...	All	Owner	Any	Date Range	Last Activity	All Time
<input type="checkbox"/>	Lead Name	Lead Score	Lead Stage	Owner	Modified On			
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Dhanush Dhanush	0	Prospect	Akhilesh Manivarman	03/17/2022 11:49			
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Ajith R	0	Prospect	Akhilesh Manivarman	02/08/2022 12:26			
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Rajeswaran A	0	Prospect	Akhilesh Manivarman	02/08/2022 12:26			
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Remco	0	Prospect	Akhilesh Manivarman	12/14/2021 02:05			
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Akilesh	0	Prospect	Akhilesh Manivarman	12/09/2021 03:31 PM			<input type="button" value="⚙"/>
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> John Smith	0	Prospect	Akhilesh Manivarman	09/09/2021 12:59 PM			<input type="button" value="⚙"/>
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Sample Lead	0	Prospect	Akhilesh Manivarman	06/15/2021 03:40 PM			<input type="button" value="⚙"/>

- Edit
- Edit+
- New Sales Activity
- Add Task
- Add Activity
- Send Email
- WhatsApp**
- Send SMS
- Change Owner
- Change Stage
- Add to List
- Delete
- Clone
- Share Via Email

Show 1 - 7 of 7

Leadsquared - Sending templated message to a lead

Send WhatsApp Message ? ×

Sending message to Akilesh ▼ From C [REDACTED] (01-5555555555) ▼

Service window is Inactive, you can send only approved template message. [Learn More](#)

Message Body*

All Templates

 ×

- bashopin (Approved)

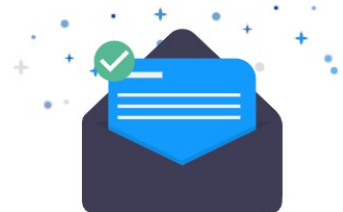
om the the list

📄

Send

Leadsquared – Sending templated message sent to a lead

Send WhatsApp Message ?

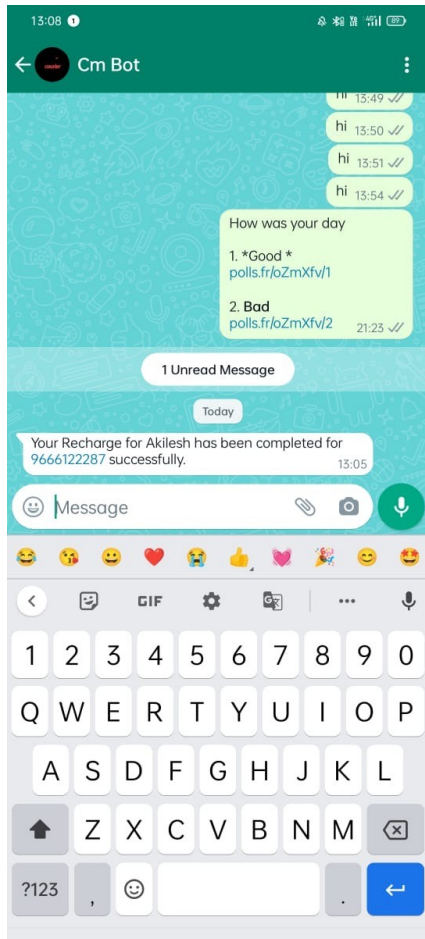


Your message has been sent successfully to +91-*****87

Send Message

Leadsquared –templated message sent to a lead

Message received on Whatsapp as well as logged as activity under a lead



Lead Details

Lead Details for Akilesh Prospect. The card shows the contact name, company (CM.com), email (Akilesh.manivarman@cm.com), and a phone number. Below the card, a table displays lead metrics: Lead Score (0), Disengaged (0), and Lead Quality (--). A 'Lead Properties' table lists the owner (Akhilesh Manivarman), lead source (Social Media), and lead age (132 Days).

Lead Properties	
Owner	Akhilesh Manivarman
Lead Source	Social Media
Lead Age	132 Days

Activity History for Akilesh Prospect. The interface includes filters for Activity Type (All Selected) and Time (All Time). The activity log shows three WhatsApp messages: one on 21 Apr 2022 regarding a recharge completion, and two on 14 Apr 2022 and 17 Mar 2022 regarding a COVID recovery plan.

Date	Activity Type	Time	Description
21 Apr 01:05 PM	WhatsApp Message		bashopin : Your Recharge for Akilesh has been completed for 9666122287 successfully. Added by Akhilesh Manivarman on 21 Apr 2022 01:05 PM
14 Apr 01:09 PM	WhatsApp Message		zyla_template : Dear Customer, The Covid Recovery Plan is 100% personalized, based on your latest diagnostic test report, your chief complaints (such as fever, weakness, difficulty in breathing, lack of appetite, headaches, body pains, etc). The program includes your own health experts on WhatsApp, monitoring your daily health vitals to View more Added by Akhilesh Manivarman on 14 Apr 2022 01:09 PM
17 Mar 11:45 AM	WhatsApp Message		zyla_template : Dear Customer, The Covid Recovery Plan is 100% personalized, based on your latest diagnostic test report, your chief complaints (such as fever, weakness, difficulty in breathing, lack of appetite, headaches, body pains, etc).



Thank you

For questions please contact: indiasupport@cm.com