

WHATSAPP CONNECT - USER GUIDE



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Overview

WhatsApp is the best solution for interaction between the customer and the support team. As it is the easiest option that is always available with you so that no matter how far you are it's just a message away. For other support services, you need to send an email for your query and wait for the response but via quick response from WhatsApp, you get a chance to communicate with your customers and convince them or impress them for buying products by providing the best customer service.

For any organization, it is essential that they remain in touch with their customers and address the concerns of them as effectively as possible. In the Modern era, the usage of social media has grown so the communication application has been one of the most widely-used services across the world. It will be a wise approach for using the chat app as the chat lets you handle multiple chats at once, so the wait time is reduced and customers have a better experience.

For Eg: If you want to solve your customer's queries at any time from anywhere to give the best services to them, our extension helps you to do this as WhatsApp will always be installed on your phone and you will not require to open a laptop and can easily reply to them.

WhatsApp Connect extension for Magento 2 allows one to one conversation between store support and customer which helps customers to clear their doubts on the spot regarding products, payment, exchange, etc. By using this extension store owner can build healthy relations with the customer by replying to their queries and can increase their sales. A must-have extension for any store owner to stay connected with users and to work easy by just a click using this extension.

The extension facilitates the "Manage Whatsapp Agents" grid for the admin to check the list of added chat agents. With the "Add New" button, the admin can add a new chat agent. Activate the status of the chat agent after entering the name, department name in which he belongs, mobile number, default chat message and photo.

Main Features

- **Instant WhatsApp Support** - With just one click it will allow the visitor/customer to contact your support team on WhatsApp.
- **Ability to connect with multiple agents** - This module facilitates to connect with multiple agents using WhatsApp.
- **Button Design Customization** - Using configuration admin can change the design layout of the WhatsApp Connect button according to their needs.
- **Connectivity** - This module facilitates to work with the WhatsApp web and WhatsApp Application.
- **Allows to select the visibility for WhatsApp connect button** - Admin can select whether to display the WhatsApp Connect button at Desktop View, Mobile View or in Both Views.
- **Set the position of WhatsApp connect button** - Allows admin to set the position of the button i.e. Bottom-Right, Bottom-Left, Top-Right or Top-Left based on your needs.
- **Give instant support to your Customers** - This extension helps you to provides instant support to your customers and solves their queries instantly.
- Admin can add multiple agents of different departments from the backend.

- The extension facilitates the "Manage WhatsApp Chat Agents" grid for the admin to check the list of added agents. With the "Add New" button, the admin can add a new chat agent.
- Activate the status of the chat agent after entering the name, department name in which he belongs, mobile number, default chat message and photo.
- Grow your business through quick reply using WhatsApp.
- Enhance the user experience.

Account & Pricing

- If you want to use this extension, you must have a [WhatsApp account](#).
- You can easily download WhatsApp for **FREE** from the Google Play Store - <https://play.google.com/store/apps/details?id=com.whatsapp&hl=en> or Apple App Store - <https://apps.apple.com/in/app/whatsapp-messenger/id310633997>
- Please follow this link web.whatsapp.com if you want to use WhatsApp on your Computer.

Reasons to choose Zestard's WhatsApp Connect?

Easy to use & Install	Display button at Desktop & Mobile view	Customize based on your needs
Set the position for Desktop view	Give instant support to your Customers	Solve Customers queries quickly
Ability to add multiple agents	Enhance the user experience	Shows list of active agents in frontend
Grow your business through WhatsApp marketing	Compatible with WhatsApp web & WhatsApp app	Enable multiple agents configuration from backend

Installation Guide

Once you have purchased & downloaded our extension follow the below steps to install the extension. The easiest way to install a Magento 2 extension is by using SFTP or FTP. To do this, first, download our WhatsApp Connect module and follow the below steps.

In short, for Professionals or Techie Person

1. Unzip the extension.
2. Login to your root directory via FTP or SFTP.
3. Go to your remote directory app/code/
4. Create directory **Zestardtech** and under that create subdirectory **WhatsappConnect**.
5. Now upload all the unzipped code into Zestardtech/WhatsappConnect directory.
6. Then open your SSH or Terminal.
7. Go to your root directory and RUN below 4 commands step by steps:
 - php bin/magento setup:upgrade
 - php bin/magento setup:di:compile
 - php bin/magento setup:static-content:deploy -f
 - php bin/magento cache:clean
8. If you didn't get any error during the commands execution process then our extension is successfully installed in your store.

To Note: If you face any error during this process then please either share the screenshots or share credentials of your store at our email id **support@zestard.com** and will help you install the extension properly.

Detailed Installation Instructions

Step 1: Take precautionary measures before starting to install the extension.

- Log in to the Magento Admin and disable all the caches:

Go to System → Tools → Cache Management.

Selecting all caches in the list and choose the “**Disable**” option from the “take action” dropdown menu and finally press submit.

Step 2: Connect to FTP and upload the unzipped directory.

- Connect to your site using FTP or SFTP. Go to your remote directory app/code/
- Create directory **Zestardtech** and under that create subdirectory **WhatsappConnect**. Now upload all the unzipped code into this directory.

Step 3: Run Commands

- Open your SSH or Terminal.
- Go to your root directory and RUN below 4 commands step by steps:
 - php bin/magento setup:upgrade

```
[root@103 magento221]# php bin/magento setup:upgrade
Cache cleared successfully
File system cleanup:
/home/idoideo/public_html/magento221/generated/code/Composer
/home/idoideo/public_html/magento221/generated/code/Magento
/home/idoideo/public_html/magento221/generated/code/Shopial
/home/idoideo/public_html/magento221/generated/code/Symfony
/home/idoideo/public_html/magento221/generated/code/Zestardtech
/home/idoideo/public_html/magento221/generated/metaddata/adminhtml.php
/home/idoideo/public_html/magento221/generated/metaddata/crontab.php
/home/idoideo/public_html/magento221/generated/metaddata/frontend.php
/home/idoideo/public_html/magento221/generated/metaddata/global.php
/home/idoideo/public_html/magento221/generated/metaddata/webapi_rest.php
/home/idoideo/public_html/magento221/generated/metaddata/webapi_soap.php
/home/idoideo/public_html/magento221/pub/static/adminhtml
/home/idoideo/public_html/magento221/pub/static/declared_version.txt
/home/idoideo/public_html/magento221/pub/static/frontend
/home/idoideo/public_html/magento221/var/view_preprocessed/pub
```

- php bin/magento setup:di:compile

```
[root@103 magento212]# php bin/magento setup:di:compile
Compilation was started.
```

- php bin/magento setup:static-content:deploy -f

```
[root@103 magento221]# php bin/magento setup:static-content:deploy -f
Deploy using quick strategy
frontend/Magento/blank/en_US          500/2088      =====>----- 23% %    3 secs
```

- php bin/magento cache:clean

```
[root@103 magento221]# php bin/magento cache:clean
Cleaned cache types:
config
layout
block_html
collections
reflection
db_ddl
eav
customer_notification
full_page
config_integration
config_integration_api
translate
config_webservice
```

- If you didn't get any error during the commands execution process then our extension is successfully installed in your store.

Step 4: To confirm Installation and activation.

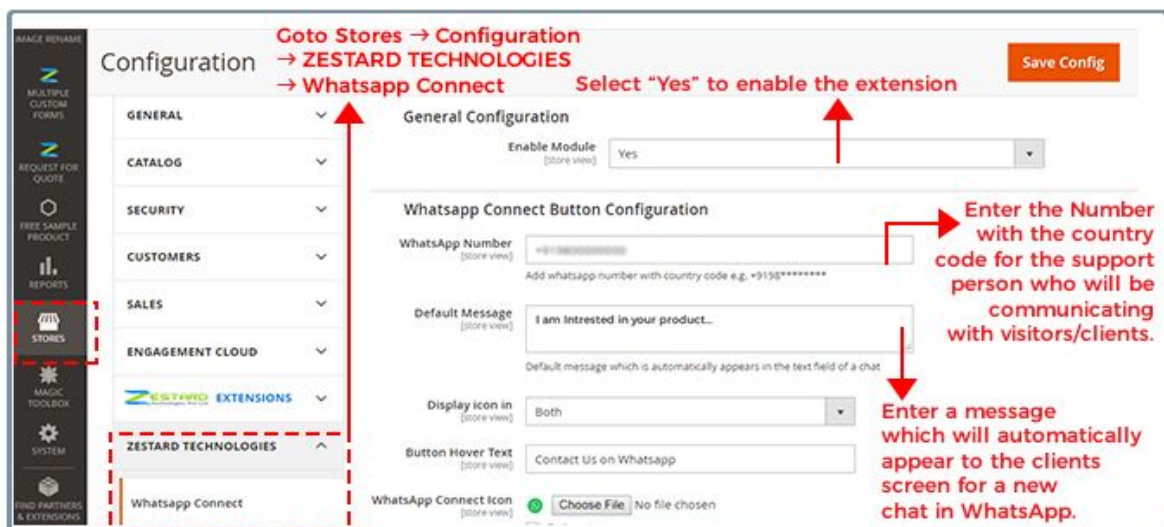
- To complete the installation you need to log out of your Magento Admin and login back. You can now flush and then enable the Magento cache.
- Open your SSH or Terminal and run this command `php bin/magento module:status Zestardtech_WhatsappConnect` and if you get Output as **Module is enabled** then our extension is installed properly in your store.

User Guide

How to Configure WhatsApp Connect Extension?

1. Go to Stores → Configuration → Zestard Technology → Whatsapp Connect.

- **Enable Module:** To Enable the module select "Yes" from the dropdown.
- **WhatsApp Number:** Enter the Number with the country code for the support person who will be communicating with visitors/clients.
- **Default Message:** Enter a message which will automatically appear to the client's screen for a new chat in WhatsApp.
- **Display icon in view(s):** Select the option to display the WhatsApp Connect button at Desktop, Mobile or Both depending on your needs.
- **Button Hover Text:** Enter a message which will be visible to the customers at the time of hovering the WhatsApp Connect button.
- **WhatsApp Connect Icon:** Upload your WhatsApp Connect Icon to show on the frontend.
- **WhatsApp Connect Icon's Position:** Select the position from the options to show the WhatsApp Connect Icon on the frontend.



Configuration

Goto Stores → Configuration
→ ZESTARD TECHNOLOGIES
→ Whatsapp Connect

Select "Yes" to enable the extension

Save Config

GENERAL [dropdown]
CATALOG [dropdown]
SECURITY [dropdown]
CUSTOMERS [dropdown]
SALES [dropdown]
ENGAGEMENT CLOUD [dropdown]
ZESTARD EXTENSIONS [dropdown]
ZESTARD TECHNOLOGIES [dropdown]
Whatsapp Connect

General Configuration

Enable Module [dropdown] Yes

Whatsapp Connect Button Configuration

WhatsApp Number [input] +91-9898989898
Add whatsapp number with country code e.g. +9198*****

Default Message [input] I am Intrested in your product...
Default message which is automatically appears in the text field of a chat

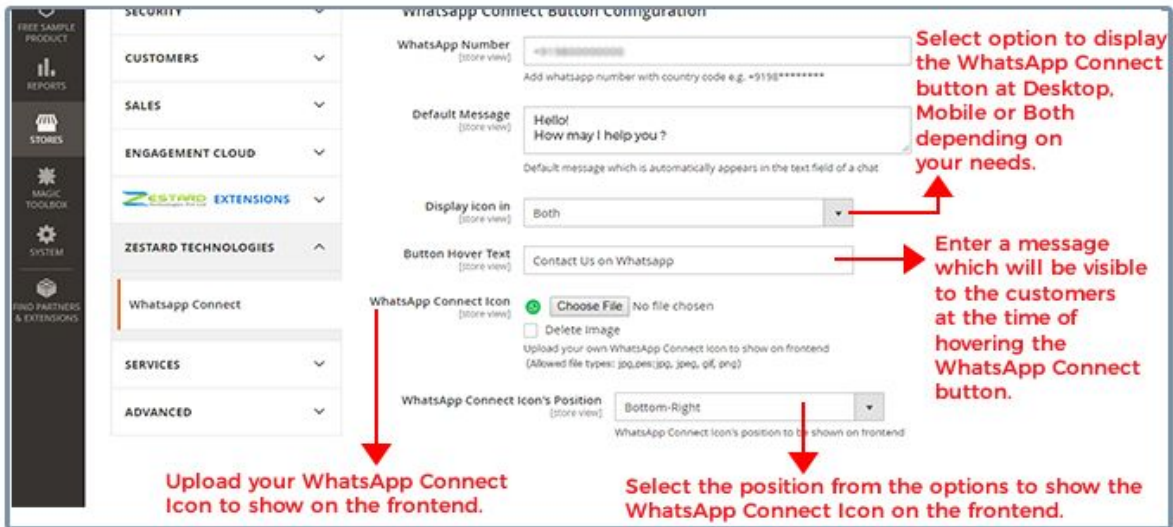
Display icon in [dropdown] Both

Button Hover Text [input] Contact Us on Whatsapp

WhatsApp Connect Icon [input] Choose File No file chosen

Enter the Number with the country code for the support person who will be communicating with visitors/clients.

Enter a message which will automatically appear to the clients screen for a new chat in WhatsApp.



WhatsApp Connect Button Configuration

- WhatsApp Number** (store view):

Add whatsapp number with country code e.g. +9198*****
- Default Message** (store view): Hello! How may I help you ?

Default message which is automatically appears in the text field of a chat
- Display icon in** (store view): Both

Select option to display the WhatsApp Connect button at Desktop, Mobile or Both depending on your needs.
- Button Hover Text** (store view): Contact Us on Whatsapp

Enter a message which will be visible to the customers at the time of hovering the WhatsApp Connect button.
- WhatsApp Connect Icon** (store view): No file chosen

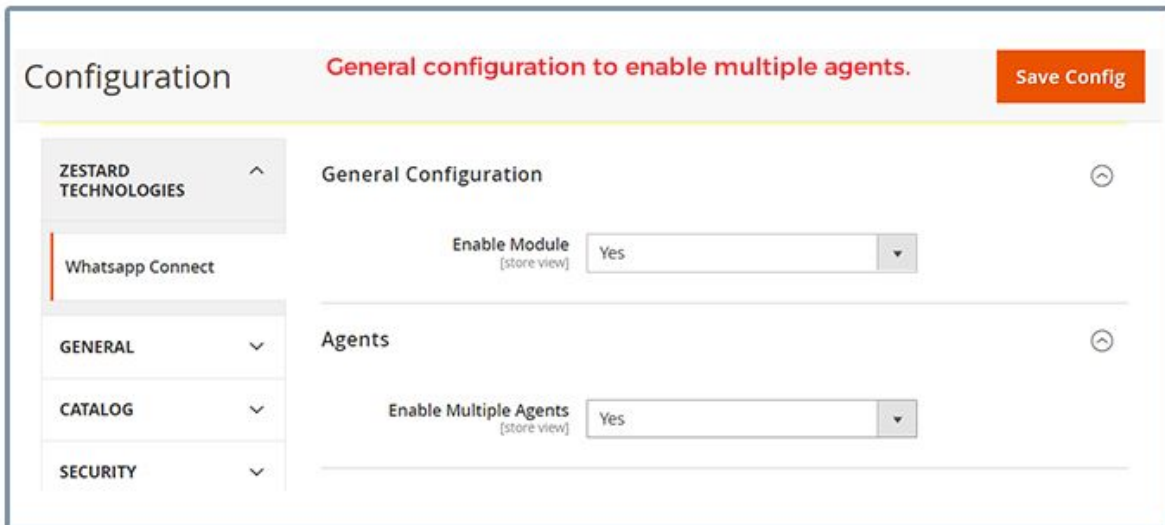
Upload your own WhatsApp Connect icon to show on frontend (Allowed file types: jpg, png, gif, png)
- WhatsApp Connect Icon's Position** (store view): Bottom-Right

Select the position from the options to show the WhatsApp Connect Icon on the frontend.

Annotations:

- Upload your WhatsApp Connect icon to show on the frontend.
- Select the position from the options to show the WhatsApp Connect Icon on the frontend.

2. General configuration to enable multiple agents.



Configuration General configuration to enable multiple agents.

ZESTARD TECHNOLOGIES ^

- Whatsapp Connect
- GENERAL v
- CATALOG v
- SECURITY v

General Configuration (store view) ^

Enable Module (store view) Yes v

Agents (store view) ^

Enable Multiple Agents (store view) Yes v

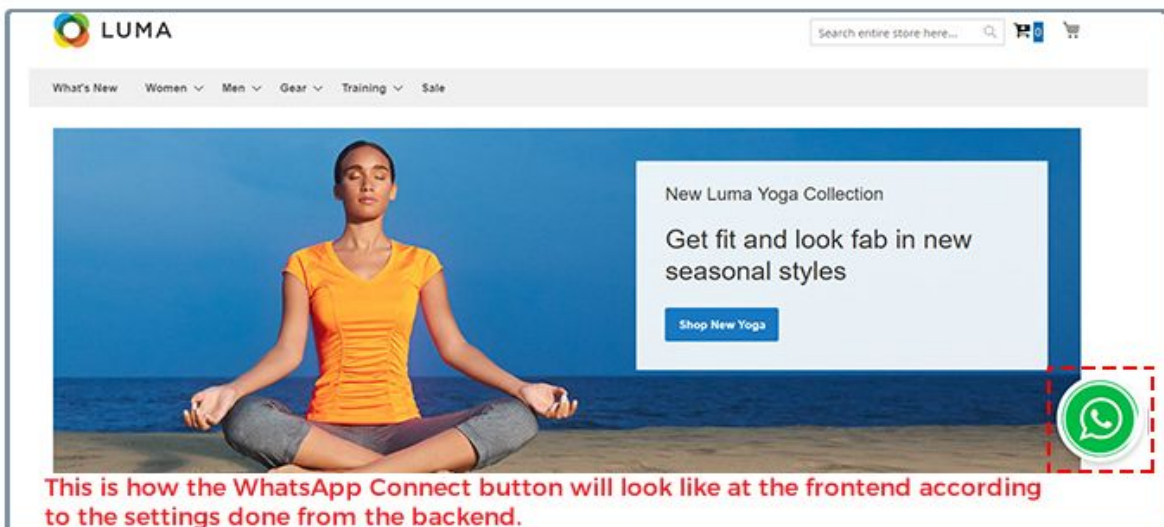
3. Backend list of Whatsapp Agents.

Manage Whatsapp Agents **Backend List of Whatsapp Agents.** [Add Agents](#)

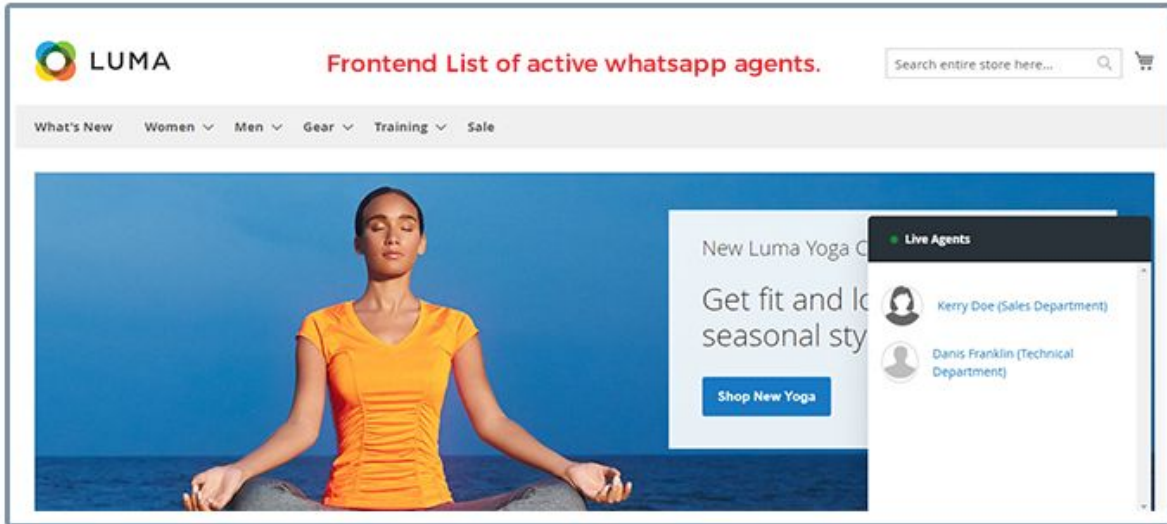
Actions ▾ 2 records found 20 ▾ per page < 1 of 1 >

▾	ID	Agent Name	Department Name	Mobile	Default Message	Photo	Status	Action
Any ▾	From <input type="text"/>	<input type="text"/>	<input type="text"/>					
	To <input type="text"/>							
<input type="checkbox"/>	2	Danis Franklin	Technical Department	901-██████	Need any help?		Active	Edit
<input type="checkbox"/>	1	Kerry Doe	Sales Department	991-██████	Hello, How may we help you?		Active	Edit

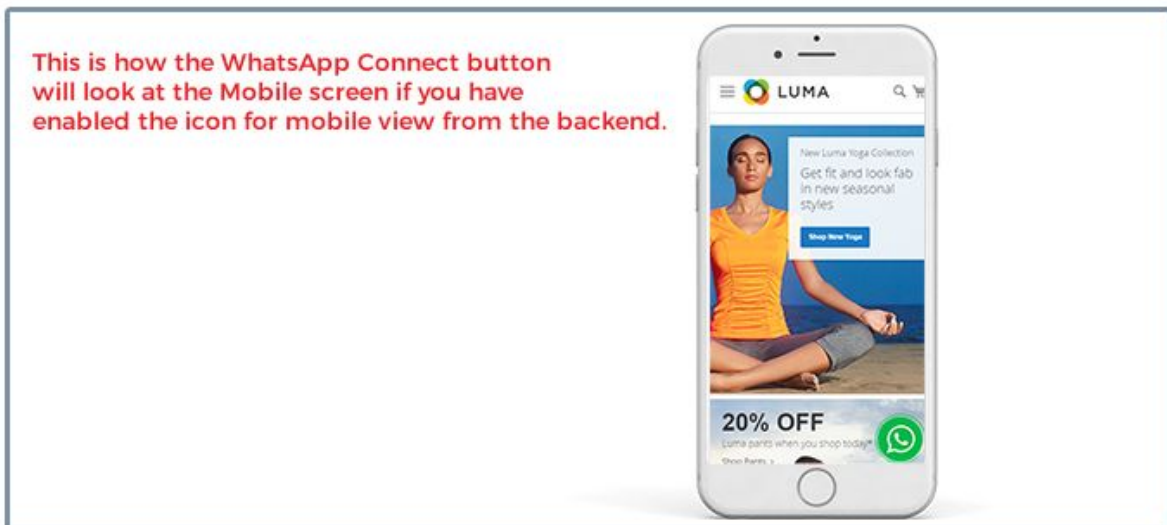
4. This is how the WhatsApp Connect button will look like at the frontend according to the settings done from the backend.



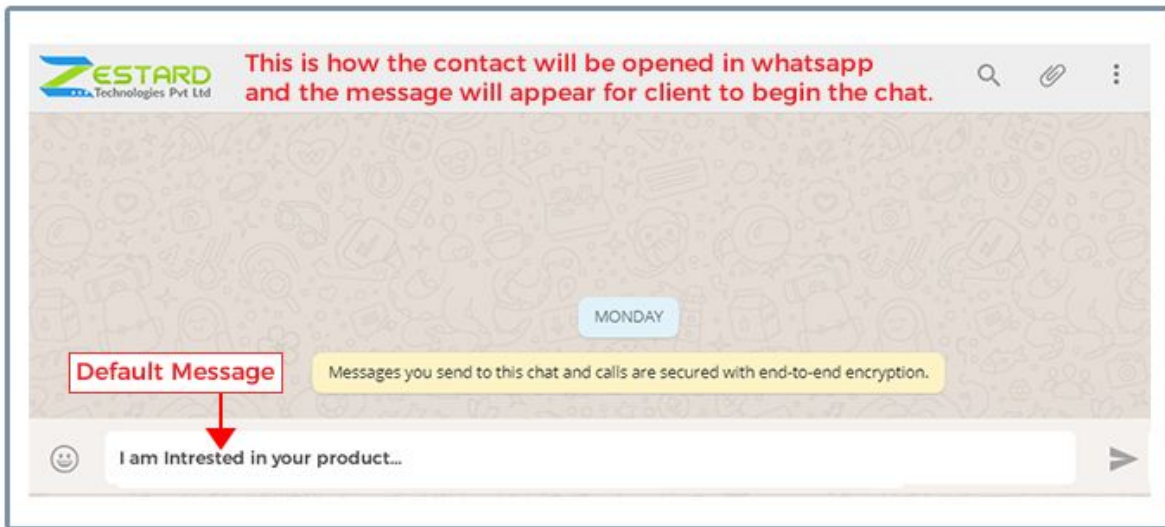
5. Frontend list of active Whatsapp Agents.



6. This is how the WhatsApp Connect button will look at the mobile screen if you have enabled the icon for the mobile view from the backend.



7. This is how the contact will be opened in WhatsApp and the message will appear for the client to begin the chat.



NOTE: Please clear the cache after doing any changes in configuration to see it in frontend.

FAQs

Can I change the position of WhatsApp Connect button?

Yes, you can change the position of WhatsApp Connect Button. Go to Stores → Configuration → ZESTARD TECHNOLOGIES → Whatsapp Connect and from the dropdown "WhatsApp Connect Icon's Position" you can select the position to Top-Left, Top-Right, Top-Middle, etc based on your needs.

Can I set custom text for the hover of the WhatsApp Connect button?

Yes, you can set your desired text from the configuration you can set your text in the "Button hover text" field and it will reflect on the hover of the WhatsApp Connect button.

Is it possible to display the WhatsApp Connect button for desktop view only?

Yes, This module facilitates you to enable this WhatsApp connect button for desktop view or mobile view or for both views.

Can I update the WhatsApp Connect icon?

Yes, you can upload your own icon from configuration at the “WhatsApp Connect Icon” field and it will reflect on the frontend.

How can I disable this extension?

Go to Stores → Configuration → ZESTARD TECHNOLOGIES → Whatsapp Connect and from General Configuration, at the field “Enable Module” select “NO” to disable the extension.

Get Support From Our Team



We are here to help you out if you are facing any issues after installing the extension. Drop us an email at support@zestard.com and will get back to you.