WhatsApp Chatbot Flow – Customer and Vendor Automation

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This comprehensive guide outlines the automated WhatsApp chatbot workflow designed specifically for customer and vendor interactions. Our intelligent system seamlessly connects with your existing business infrastructure to provide instant, personalised support through WhatsApp Business API. The chatbot serves as your 24/7 digital assistant, capable of handling common enquiries, retrieving critical business documents, and maintaining professional communication standards. Whether your stakeholders need their ledger statements, outstanding balance details, or invoice copies, this automation ensures they receive accurate information within seconds, eliminating wait times and reducing the workload on your support team whilst maintaining the highest standards of data security and customer satisfaction.
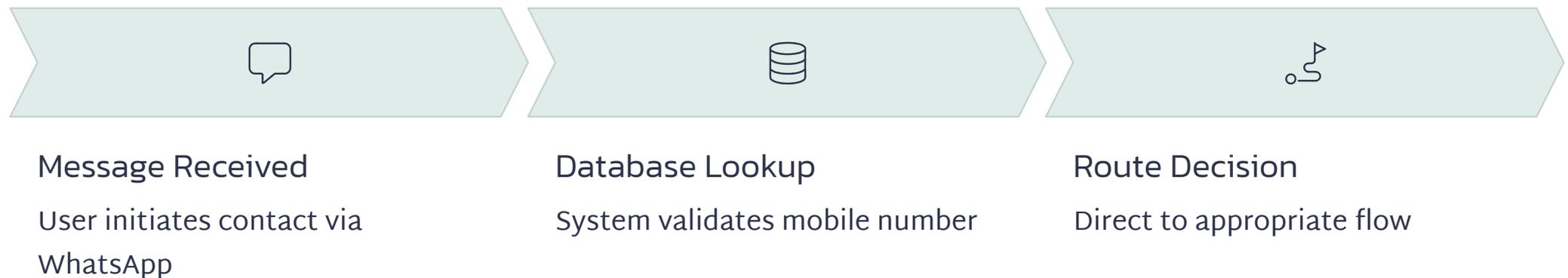
How the System Identifies and Routes Users

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Intelligent User Recognition

The moment a message arrives at your registered WhatsApp number, our system springs into action. It instantly cross-references the sender's mobile number against your comprehensive customer and vendor master database, ensuring accurate identification and appropriate routing within milliseconds.

Database Validation Process

The chatbot performs real-time validation against your ERP or CRM system, checking whether the mobile number exists in your registered database. This critical decision point determines the entire conversation flow—registered users receive personalised, account-specific assistance whilst new contacts are welcomed with introductory information about your business and guidance on how to establish a formal relationship.

Message Received

User initiates contact via WhatsApp

Database Lookup

System validates mobile number

Route Decision

Direct to appropriate flow

This intelligent routing mechanism ensures that every interaction is contextually relevant and efficient. Registered users bypass introductory steps and immediately access self-service options, whilst unknown contacts receive the information they need to engage with your business properly. The system maintains detailed logs of all interactions, providing valuable insights into communication patterns and helping you identify potential leads or service improvement opportunities.

Unknown User Experience – Building New Relationships

When the system encounters an unregistered mobile number, it automatically initiates a carefully crafted welcome sequence designed to introduce your organisation professionally whilst providing essential information. This flow serves multiple purposes: it establishes your brand identity, sets clear expectations about your services, and guides potential customers or vendors through the proper channels for establishing a business relationship.

Welcome Message

A warm, professional greeting that acknowledges the contact and expresses appreciation for their interest in your business

Company Introduction

A concise overview of your organisation, highlighting key services, industry expertise, and unique value propositions

Business Description

Detailed information about your products, services, and capabilities to help the contact understand how you can serve their needs

Contact Details

Complete official contact information including phone numbers, email addresses, website URL, and physical office location

Next Steps Guidance

Clear instructions on how to proceed with formal registration, request quotes, or connect with your sales team

This approach ensures that even unregistered contacts receive a positive brand experience. Rather than leaving them without direction, the system provides comprehensive information that empowers them to take the next appropriate action. The message can include links to your registration portal, sales enquiry forms, or direct contact details for your business development team. This automated introduction maintains professionalism whilst freeing your team from handling repetitive initial enquiries, allowing them to focus on qualified leads and existing customer relationships.

Registered User Services – Instant Document Access

Personalised Welcome Experience

Registered customers and vendors receive a personalised greeting that addresses them by name, creating an immediate sense of recognition and value. The system displays three interactive buttons that provide instant access to the most commonly requested business documents and account information.

> "Welcome [Customer Name]. How can we assist you today?"

This personalised approach significantly enhances user satisfaction whilst reducing response times from hours or days to mere seconds, transforming your customer service efficiency.
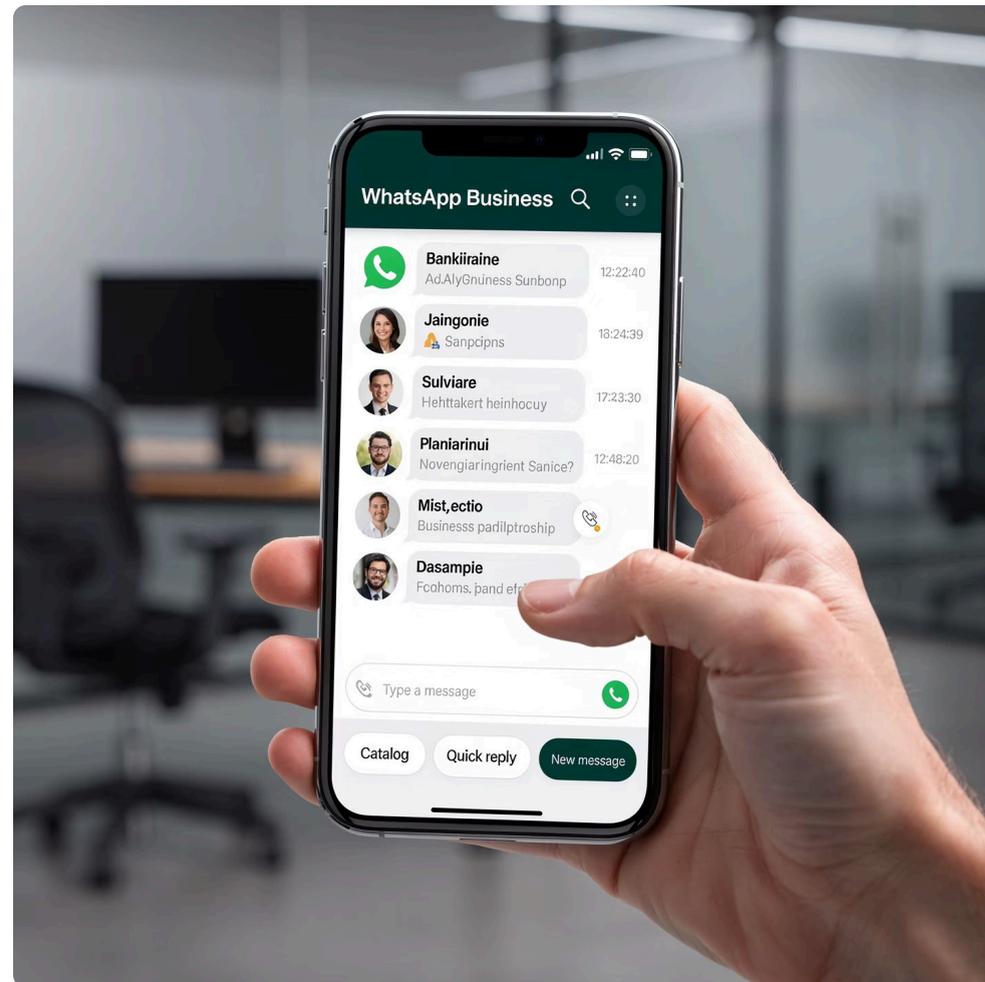
Get Ledger Statement

Instantly retrieves complete ledger statements from your ERP system, showing all transactions, credits, debits, and running balances. The system generates a professionally formatted PDF document that users can save, print, or forward as needed.

Get Outstanding Balance

Provides real-time outstanding balance information, including aged receivables or payables, due dates, and payment terms. Users can quickly assess their account status without waiting for manual reports from your accounts team.

Download Invoice Copy

Enables users to request specific invoice copies by providing the invoice number. The system validates the request against their account permissions and delivers authentic invoice PDFs instantly through WhatsApp's secure media delivery system.

Technical Architecture and Backend Integration

The WhatsApp chatbot automation relies on a sophisticated backend architecture that seamlessly integrates multiple business systems to deliver real-time, accurate information. At its core, the solution leverages WhatsApp Business API, which provides enterprise-grade messaging capabilities with robust security features and high availability. This API serves as the communication bridge between your users and your internal systems, handling message receipt, delivery confirmation, and media transfer with enterprise reliability.

WhatsApp Business API

Enterprise messaging platform providing secure, reliable communication infrastructure with advanced features

Database Validation

Real-time lookup against customer and vendor master tables ensuring accurate user identification

ERP Integration

Direct connection to your accounting system for retrieving ledgers, outstanding balances, and invoices

PDF Generation

Automated document formatting module creating professional, branded PDF reports on demand

Document Delivery

Secure media transmission through WhatsApp ensuring documents reach users safely and instantly

The integration layer connects with your existing ERP or accounting software through secure APIs or database connections, ensuring that all information retrieved is current and accurate. The PDF generation module formats raw data into professional documents that match your corporate branding guidelines, maintaining consistency across all customer communications. Security remains paramount throughout the system, with encrypted data transmission, access control validation, and comprehensive audit logging. The architecture supports horizontal scaling, meaning it can handle increasing message volumes as your business grows without degradation in performance or user experience.