

SleekFlow Messaging Setup Checklist

Set up your workspace in minutes,
so you can start connecting with customers immediately.



Step 1 : Create your first WhatsApp template message

Click!

Go to Create template →

1

Template title
Name your template with a clear title for easy reference.

2

Category
Choose the template category: **marketing, utility, or authentication**. Meta may reject templates if the content doesn't match the selected category.

3

Language
Select the language of your template.

4

Header Type
If you want to attach documents or media, upload them here. Otherwise, the header text is optional.

CHANNELS

←

Create new WhatsApp message template

Settings

You can initiate conversations with your customers with an approved templated even after the 24-hour conversation window. WhatsApp Official will review your submission within 24 hours.

TEMPLATE TITLE

0/512

1 Enter your template title

Template title can only contain lowercase characters, numbers and underscores

CATEGORY

2 Select category

LANGUAGE

3 English

HEADER TYPE

None

4

Tips ⓘ
You can add variables as dynamic content to personalize your message templates

- Use double curly braces to indicate dynamic content. For example, to send "Hello Janice ! You received an update from SleekFlow !", the template would be: "Hello {{1}} ! You received an update from {{2}} .
- To avoid being rejected by WhatsApp Official, variables should not be used at the beginning or end of your message

MESSAGE

5 Enter your message

0/1024

FOOTER (OPTIONAL)

6 Enter your footer

0/60

BUTTON TYPE (OPTIONAL)

7 None

8

PREVIEW

You can see your sample message here.

You can see your sample footer here

Button 1

You can see your sample message here.

You can see your sample footer here

9 Submit for review

5

Body Message
Insert your main message content here. Use variables to insert dynamic content, such as name and email.

6

Footer
Add a one-liner at the end of your message, such as opt-in or opt-out instructions.

7

Buttons
Add quick reply or call-to-action buttons for customers to quickly use canned response or go to a webpage.

8

Preview
Check how the template will appear to your customers.

9

Submit for review
Submit your template to Meta for approval.

Step 2: Start using the inbox for everyday conversations

Click!

Go to Inbox now

- 1

My Inbox

Check conversations assigned to you, ones you're collaborating on, or any message where you're mentioned.
- 2

Company inbox

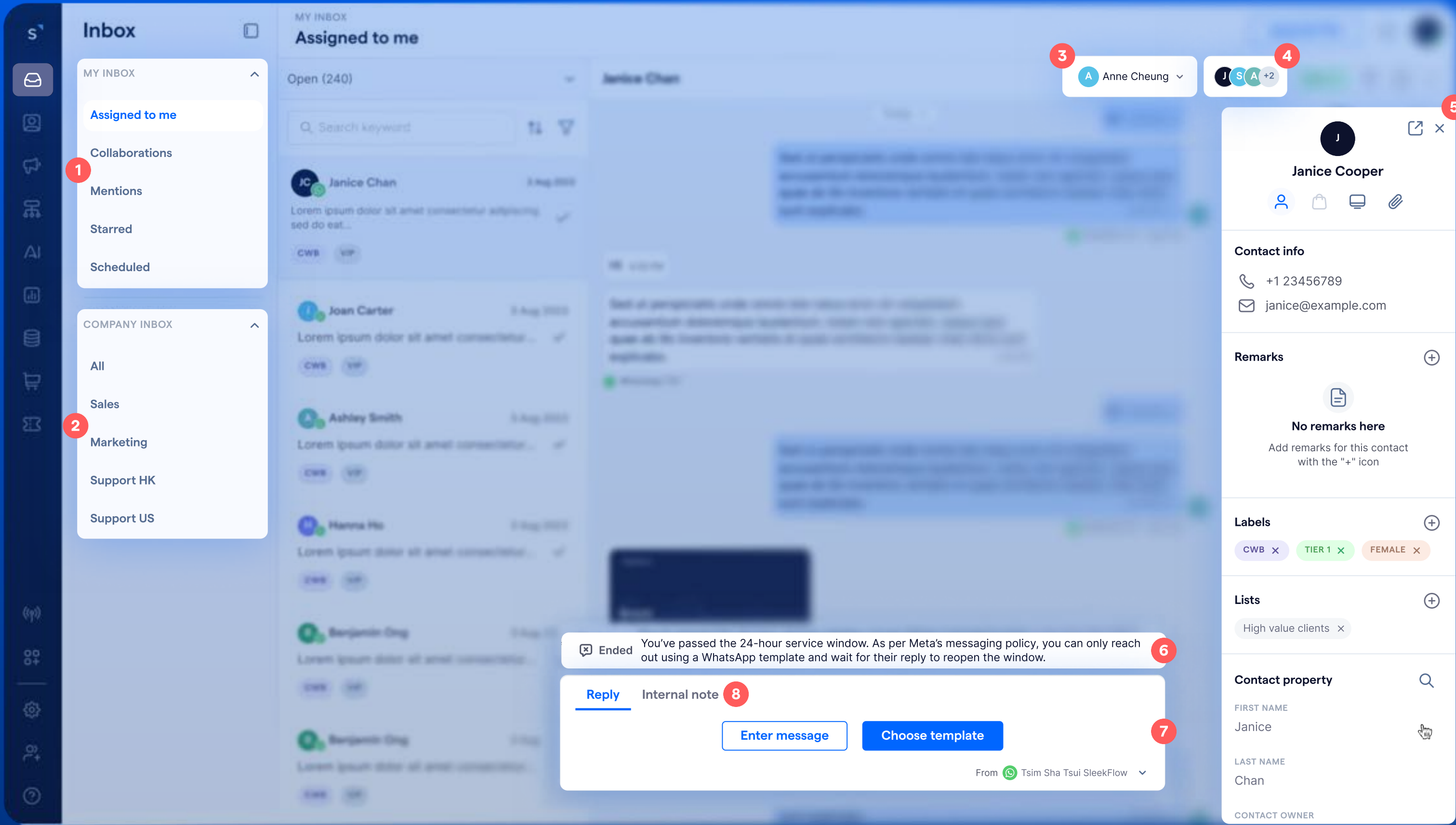
Check conversations assigned to your team. Use them to collaborate across functions and monitor team-wide workflows.
- 3

Assignee

Assign ownership so each conversation has a clear point person.
- 4

Collaborator

Add teammates to manage conversations together.



5 **Contact Panel**

View complete customer details next to the chat window, and update any contact properties instantly as you chat.

6 **Conversation notice indicator**

If your WhatsApp 24-hour service window is open, you can send messages freely without a template.

7 **Choose a template**

Use an approved WhatsApp template to initiate a new conversation outside WhatsApp 24-hour service window.

8 **Internal note**

Leave private notes or @mention teammates; customers never see this.

Step 3: Upload your contacts and customize the contact properties

Click!

Go to Import contacts →

1

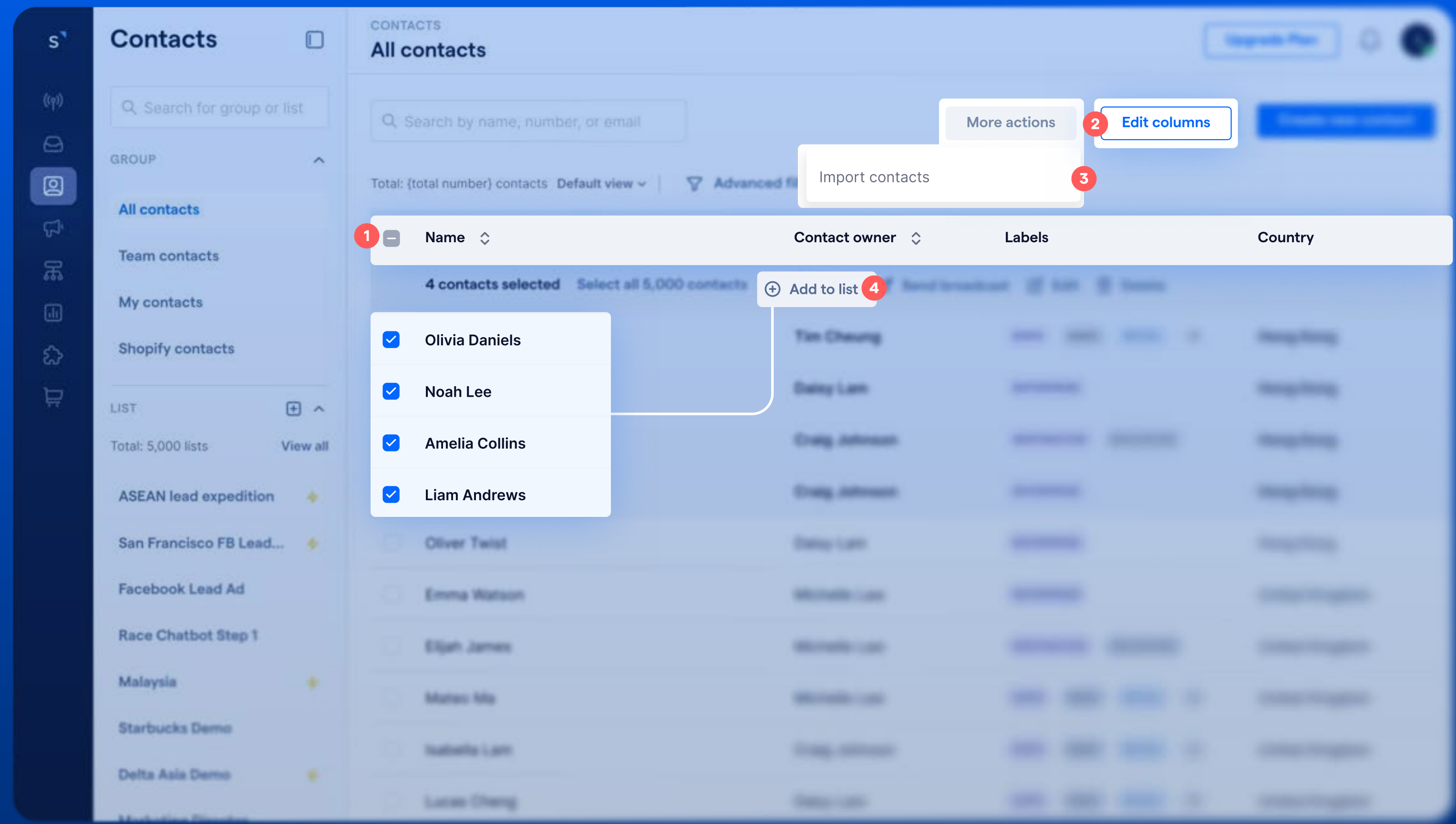
Contact property

View the data fields that comprise each customer profile. By default, SleekFlow provides fields such as name, phone number, and email.

2

Edit columns > Add column

Add new contact properties based on your needs.



3

Import contacts

Upload your existing contacts in bulk (.csv or .xlsx). Follow the on-screen instructions to complete the import.

4

Create list for broadcast

Bulk select target audiences and add them to a list for segmentation and future campaigns.

 Go to Broadcast

Always send a test message to yourself or teammates before going live.

←

BROADCASTS

Create new broadcast

Review and publish

1 Settings

2 Content

1 WhatsApp broadcast settings

Set the parameters for your broadcast to send via WhatsApp

CHANNEL

1  +1 1234 5678

BROADCAST NAME

2 Promotion Announcement

BROADCAST TIME

3 ☒ Send immediately

AUDIENCE

24-hour messaging limit remaining: 1000/1000

4 Choose audience

2 Content

Create and edit your broadcast message content.

Template

Manual

Clear

Button

Choose an approved template to avoid any failure to deliver outbound messages to contacts out of the 24-hour messaging window.