karyagrah.com

CLIENT GUIDE

Set up, connect and run your business on Karyagrah

Getting started, connecting WhatsApp, Instagram and Messenger, managing your team, the settings, and every module in plain words.

Getting started | Channels | Team | Settings | Modules | How it links

For business owners, managers and staff
No technical knowledge needed

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About this guide

This guide is for the businesses that use Karyagrah: owners, managers and staff. You do not need to be technical to follow it.

How to read it

If you want to	Read
Start a new account	Chapter 1, once, from top to bottom
Connect WhatsApp, Instagram or Messenger	Chapter 2. Each channel starts with a "what to keep ready" box
Add staff and decide what each person may see	Chapter 3
Change how chats, hours, billing or security work	Chapter 4
Know what one module does	Chapter 5. It follows the left menu, top to bottom
See how the modules feed each other	Chapter 6
Fix a problem, or find a word or a module	Chapter 7, the glossary and the index at the end

Two things to know first

1. What you see depends on your plan and your role. Karyagrah is sold as plans and add-ons, and every person has a role. Your screen may show fewer items than this guide.

- A menu item with a **padlock** is not in your plan. Click it to see how to add it.
- A menu item that is **missing** is not allowed for your role. Ask your admin.
- A menu item marked **Coming soon** is not on sale yet.

2. Meta makes the rules for WhatsApp, Instagram and Messenger. Rules such as the 24-hour reply window, template approval and business verification are Meta's rules, not ours, and Meta can change them at any time. Where a rule is Meta's, this guide says so in an amber box headed **Meta's rule**. If a screen of Meta's looks different from this guide, follow Meta's screen.

Words in **bold** are the words on your screen. "Click **Add Number**" means there is a button with exactly that name.

Getting help

Email **support@karyagrah.com**, call **+91 93106 93650**, or visit **karyagrah.com**. Say your company name, your branch and what you saw on the screen. A photo of the screen helps.

CHAPTER 1

Getting started

This chapter takes a new business from no account to ready to connect a channel. Do it once, in this order. The person who signs up becomes the admin of the company.

1.1 What Karyagrah is

- One place where your whole team answers customers on WhatsApp, Instagram, Messenger and your website.
- Many people share one business number. Every chat has one owner, so two people do not answer the same customer.
- A bot, or the Sahayak AI agent, can answer the routine questions. A person takes over when needed.
- Leads, quotations, orders, bookings, tasks and staff tools sit next to the chats.
- It works on the official WhatsApp Business Platform that Meta runs. Your number, your Meta account and your customers stay yours.

1.2 How your account is organised

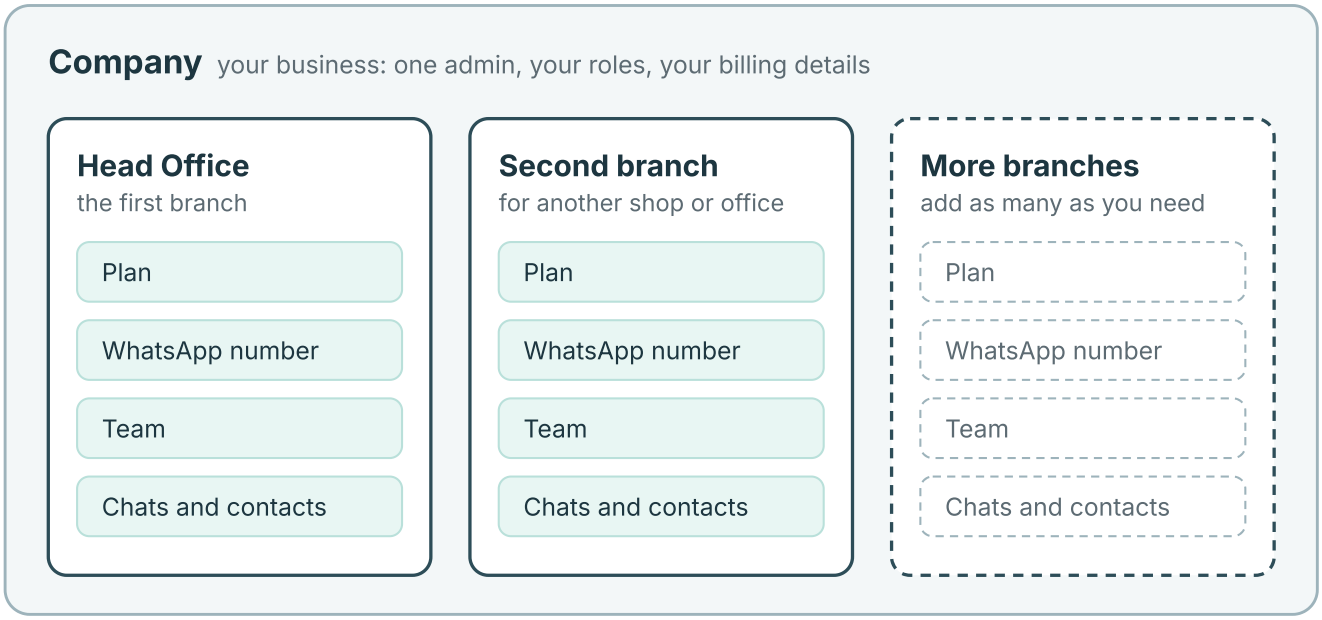


Figure 1. A company holds one or more branches. Each branch has its own plan, number, team and chats.

Word	What it means
Company	Your business. It holds the logins of your people, the roles and the billing details.
Branch	A shop, office or team inside the company. The first one is called **Head Office**. Each branch has its own plan, WhatsApp number, team and chats.
Plan	What a branch has bought: which modules it can open, and how much of each thing it gets.

Word	What it means
Add-on	An extra feature, or extra capacity, added on top of the plan.
Team member	A person with a login. Each one has a role that decides what they can see and do.

1.3 Create your account

What to keep ready

- [ ] An email address that you can open right now. A code is sent to it.
- [ ] The name of your business.
- [ ] No card is needed to sign up.

1. Open **karyagrah.com** and go to the sign-up page. Its title is **Create your business account**.
2. Type your **Company Name**, **Your Full Name** and your email address. You may also choose **What kind of business?**, and add a phone number or a referral code.
3. Click **Send OTP to Email**. A 6-digit code arrives in your email.
4. Type the code under **Verify Your Email** and click **Verify & Create Account**.
5. You see **Account created!** A second email brings your temporary password.

Karyagrah has now made your company, your first branch (**Head Office**), three roles (**Admin**, **Manager**, **Agent**) and your own Admin login.

1.4 Sign in for the first time

1. Open the sign-in page: **app.karyagrah.com**.
2. Type your email and the temporary password from the email.
3. Type the characters shown in the small picture. This check is called a captcha.
4. Click **Sign In**.
5. A box named **Set your new password** opens. Choose a password of at least 8 characters that only you know.
6. The **Setup guide** opens. It is a short tour of what Karyagrah can do. Nothing is switched on from these screens, so you can read it or skip it. Its last screen has a button **Open WhatsApp Numbers**.

> **One login, one person**
>
> On the website, a login works in one browser at a time. If the same login signs in somewhere else, the first one is signed out. The phone app is counted separately: one phone at a time. So give every person their own login. Do not share one.

If you forget your password, click **Forgot password?** on the sign-in page. A one-time code comes to your email, and then you set a new password.

1.5 Your plan and the free trial

Open **Plans & Billing** in the left menu, in the group **Billing & Settings**. It has three tabs.

Tab	What you do there
Plans	See the plans, start a free trial, subscribe, upgrade or downgrade
Add-ons	Add an extra feature, or more team members, bots, storage and so on
Transactions	See every payment and download its invoice

The free trial. If a plan offers a trial, its card shows **Start Free Demo** and says how many days it runs. A company can use the free trial once, on one branch. While the trial runs, the card shows how many days are left. Subscribe before it ends to keep the plan.

Buying a plan.

1. First open **Settings**, tab **Billing Details**. Fill your country, address, city, state and pincode, and your tax number (such as GSTIN) if you have one. Invoices use these details.
2. Open **Plans & Billing**. Choose the **Billing cycle**.
3. Read the plan card. It lists what the plan includes and shows the price for your country.
4. Click **Subscribe (Pay Once)** and pay. Do not close the payment window until it finishes.
5. Your invoice is under **Transactions**, and also on the **Billing History** page.

You can upgrade at any time. A downgrade is scheduled for the end of the billing cycle. This guide prints no prices, because they depend on your country, your plan and the billing cycle. Your own screen always shows the right price.

> **Two different bills**
>
> Your Karyagrah plan pays for the software. WhatsApp messages have their own charges, and **Meta bills those to your own WhatsApp account**, not through Karyagrah. Chapter 2 tells you where to add a payment method with Meta.

> **If a plan ends and is not renewed**
>
> Sending stops on the day the plan ends. A reminder email goes out every day. If the plan is still not renewed, Karyagrah disconnects your WhatsApp number, Instagram and Messenger from itself: 5 days after a free trial ends, or 7 days after a paid plan ends. Your chats and contacts stay saved, and you can connect again after you renew. Stored media files are removed later, after a warning email.

1.6 Set up your business and its branches

1. Open **Settings**, tab **Company**, and check your company name.

2. Open **Settings**, tab **Branch**. Check the branch name, location and timezone. Choose the timezone of the place where the branch works.
3. Open **Settings**, tab **Business Hours**, and set your open days and times.

If you have more than one shop or office, add a branch for each. Open **Branches** in the group **Team & Access**, add the branch, and give it a name, a location and a timezone.

- The branch name at the top of the screen shows which branch you are working in. Chats, contacts, team and numbers on the screen belong to that branch.
- Each branch needs its own plan and its own WhatsApp number.
- Only the company admin adds, suspends or deletes branches.
- **Suspend** blocks the people of that branch at their next sign-in and keeps all the data. **Delete** removes the branch and everything in it for good. Prefer **Suspend**.

1.7 First-day checklist

Your first day, step by step

- [ ] Sign in and set your own password.
- [ ] Start the free trial or buy a plan in **Plans & Billing**.
- [ ] Fill **Settings**, tab **Billing Details**.
- [ ] Connect your WhatsApp number (Chapter 2). Click **Test**, then send a message from another phone and see it arrive in **All Inbox**.
- [ ] Add a payment method in Meta's WhatsApp Manager, so that template messages can be sent.
- [ ] Open **Settings**, tab **Branch**, and run the **Starter Pack** for your kind of business. It creates ready templates, a bot, quick replies and more, so you do not start from an empty screen.
- [ ] Check your templates in **Templates**. Wait for Meta to approve them.
- [ ] Set your chat rules in **Settings**, tab **Chat Settings**.
- [ ] Add your team in **Team**, each person with the right role (Chapter 3).
- [ ] Ask your staff to install the Karyagrah phone app.
- [ ] Connect Instagram and Messenger, if your plan has them.
- [ ] Import your customers into **Contacts**.

CHAPTER 2

Connecting your channels

A channel is a place where customers write to you: WhatsApp, Instagram or Messenger. You connect each one once. After that, its messages arrive in Karyagrah and your team answers from there.

2.1 Before you connect anything

- **You connect your own accounts.** The WhatsApp number, the Instagram account and the Facebook Page stay yours. Karyagrah works on top of them.
- **You sign in on Meta's own pages.** The browser goes to Facebook, you sign in there, and Facebook sends you back. Karyagrah never sees your Facebook password. Never give it to anyone, including our staff.
- **Pick the right branch first.** A connection belongs to the branch shown at the top of the screen. The branch needs an active plan (a free trial counts). Instagram and Messenger must also be in your plan.
- **Use a computer**, in your usual browser, with the phone in your hand.

> **Meta's screens change**
>
> The steps inside Facebook belong to Meta, and Meta changes them from time to time. This guide tells you what Meta will ask for, so you can keep it ready. On the day, follow Meta's screen.

2.2 WhatsApp

You connect a WhatsApp number on the page **WhatsApp Numbers**, in the group **Team & Access**. Only the company admin can connect a number.

2.2.1 What to keep ready

Keep ready for WhatsApp

- [ ] **Your Karyagrah admin login**, and a plan or free trial that is active on the branch.
- [ ] **A Facebook login** of a person who has full control of your business's Meta Business account. Meta calls this account a business portfolio. If your business has none, Meta lets you create one during the steps.
- [ ] **Your business details**, written exactly as on your official papers: legal name, address, and website or business page.
- [ ] **The phone number**, with the phone in your hand. You must own the number. See the next section for the two kinds of number.
- [ ] **A display name**: the business name your customers will see on WhatsApp.
- [ ] **A payment method for Meta** (for example a card). Meta charges for template messages and bills you directly.
- [ ] **Business documents** for Meta's business verification. You can connect first and verify later. The list is a little further down, under "Business verification and the documents".

2.2.2 Choose the kind of number

Karyagrah asks **What type is your number?** and gives two choices.

	New Number	Coexistence Mode
Choose it when	The number is not on any WhatsApp app. For example a new SIM, a landline, or a number whose WhatsApp account you have deleted.	The number is already on the **WhatsApp Business app** and you want to keep using the phone as well.
What happens to the number	It works through Karyagrah only. You can no longer use it inside the WhatsApp or WhatsApp Business app on a phone.	It keeps working in the WhatsApp Business app and in Karyagrah at the same time. Messages typed on the phone also show in Karyagrah.
How Meta checks it	Meta sends a one-time code by SMS or by a voice call. The number must be able to receive one of them.	You confirm the link from the WhatsApp Business app on the phone, within 24 hours.
Limits	None of the limits on the right.	Campaigns are sent more slowly. Your Karyagrah catalog cannot be synced to Meta, so products are sent as picture cards.

Is the number on the ordinary WhatsApp app?

Coexistence works only with the **WhatsApp Business app**. If the number is on the ordinary WhatsApp app, first move it to the WhatsApp Business app, or use another number. Update the WhatsApp Business app to its newest version before you start.

2.2.3 Steps: connect a new number

1. Sign in as the company admin. Check the branch name at the top.
2. Open **WhatsApp Numbers** and click **Add Number**. A box named **Connect WhatsApp Number** opens.
3. Under **What type is your number?**, click **New Number**.
4. Click **Continue with Facebook**. The browser goes to Facebook. Do not close it.
5. Sign in to Facebook with the login that controls your Meta Business account.
6. Follow Meta's screens. Meta asks you to choose or create your business account and your WhatsApp Business Account, to type your business details, to type the phone number, and to confirm it with the code sent by SMS or voice call. It then asks for your display name and for permission for Karyagrah to manage the account. Allow everything it asks for.
7. Meta sends you back to Karyagrah. A small box shows three rows: **App Subscribe to WABA**, **2-Step Verification PIN** and **Register Phone Number**. Wait until all three are done.
8. When the box says **WABA Setup Complete!**, click **Done**. The card of the number now shows **Connected**.
9. Click **Test** on the card. You should see **Connection successful**.
10. From another phone, send a WhatsApp message to your number. It should appear in **All Inbox** within seconds.

2.2.4 Steps: connect a number that stays on the WhatsApp Business app

1. Do steps 1 and 2 above.
2. Under **What type is your number?**, click **Coexistence Mode**.
3. Click **Continue with Facebook** and follow Meta's screens. Meta asks for the number that is on your WhatsApp Business app.
4. Back in Karyagrah, the box is now named **One step left, on the phone**. On the phone that has the number:
   - Open WhatsApp Business.
   - Open the message from "Facebook Business Account" and tap **Connect**.
   - Tap "Connect to the Business Platform", then **Confirm**.
   - Paste the verification code the app shows.
5. In Karyagrah, click **Check again**. The number goes live by itself within a couple of minutes.
6. Click **Test**, then send a message from another phone to check.

Finish the phone steps within 24 hours. The box shows the exact time under "Finish by". If you miss it, the card says **Phone link expired**. Then connect again and finish on the phone within a day.

Meta's rule for coexistence numbers

Keep using the WhatsApp Business app on the phone. Meta can disconnect a coexistence number when its phone app is not opened for a long time. Meta also switches off a few features of the phone app for these numbers. Meta's own page lists them.

2.2.5 Your display name

The display name is the business name that WhatsApp can show to your customers. You type it during the Facebook steps. Meta reviews it. Until Meta approves it, a customer may see only your number.

Meta's rules for a display name

- Use the name of your business, as on your shop board, website and papers.
- Do not use a general word alone, such as "Fashion" or "Mumbai".
- Do not add words such as "Official" or "Verified", or the names WhatsApp, Facebook, Instagram or Messenger.
- No web address, no emoji and no extra symbols. At least 3 characters.

Meta decides each name. You change the name, the profile photo and the business details in Meta's **WhatsApp Manager**. Karyagrah has no screen for them.

2.2.6 Business verification and the documents

Business verification is Meta's check that your business is real. You do it on Meta's own pages, in your Meta Business account settings, under **Security Center**. Karyagrah has no screen for it and cannot do it for you.

Do you need it on the first day? No. You can connect your number and send approved templates before you are verified. But Meta keeps tight limits on a business that is not verified, such as how many new customers it can message in a day. Verification is one of the ways to raise those limits. Do it in your first weeks.

Documents Meta usually accepts

Meta asks for papers that prove your **legal business name** and your **address**. These kinds are commonly accepted:

Kind of document	What it proves
Certificate of incorporation	Legal name and registration
Business registration or licence, such as a shop and establishment certificate	Legal name and address
A tax document issued by the government, such as a GST certificate	Legal name and tax identity
A bank statement of the business account	Legal name and address

Kind of document	What it proves
A utility bill	Address or phone number only, not the legal name

Meta decides what it accepts, and its list can change. The upload screen in Meta shows the current list for your country.

Tips that prevent a rejection:

- The name and address you type must match the document exactly, letter for letter.
- Upload a clear, complete and current document. Do not crop it. Do not lock it with a password.
- A utility bill alone cannot prove the legal name. Add a registration or tax document.
- Never upload a document that is not yours, and never edit one. Meta can restrict the whole account.

2.2.7 Templates and Meta's payment method

Two more things are needed before you can write to a customer first.

1. An approved template. A template is a message that Meta approves once. You need one to write to a customer who has not written to you in the last 24 hours. Open **Templates**, write the message and click **Submit for Approval**. Meta usually answers within a day. The Templates entry in Chapter 5 has the details.

2. A payment method with Meta. Template messages are paid, and Meta bills them to your own WhatsApp account. Add a payment method in Meta Business Suite, under **WhatsApp Manager**, **Payment settings**. Without it, templates fail and the card of the number shows **Template messages are failing to send**. Normal replies inside the 24-hour window still work.

The 24-hour rule

After a customer writes to you, you can reply with normal messages for 24 hours. After that you can only send an approved template, until the customer writes again. This rule is Meta's, and it applies everywhere in Karyagrah.

2.2.8 If something goes wrong

What you see	What it means	What to do
Meta login cancelled	The Facebook window was closed before the end.	Click **Add Number** and start again.
Number already in use or **WABA already in use**	The number, or its WhatsApp account, is connected to another company.	Contact Karyagrah support.
Number in use by another branch	The number is connected to another branch of your own company.	You can move it to this branch. It is then removed from the other branch.

What you see	What it means	What to do
Setup Failed on the card	One of the three setup rows did not finish.	Click **Retry Setup**. If it fails again, send the red message on the card to support.
Waiting for the phone	A coexistence number still needs the phone steps.	Finish the four phone steps, then click **Check now**.
Reconnect needed	Meta is no longer letting Karyagrah reach the number.	Click **Reconnect WhatsApp** and allow every permission Meta asks for.
Template messages are failing to send	No payment method is set up with Meta.	Add one in WhatsApp Manager, under Payment settings.

2.3 Instagram

Connecting Instagram lets your team answer Instagram direct messages (DMs) from **All Inbox**, lets a bot or Sahayak answer them, and lets you set automatic replies to comments on your posts. You connect on the page **Instagram Comments**, in the group **Messaging**.

Keep ready for Instagram

- [ ] **An Instagram Professional account** (Business or Creator). A personal account cannot be connected.
- [ ] **A Facebook Page linked to that Instagram account.**
- [ ] **A Facebook login that can manage that Page.**
- [ ] **Message access switched on in Instagram.** In the Instagram app open Settings, then Messages and story replies, then Message controls, then Connected tools, and turn on "Allow access to messages".
- [ ] **Instagram in your Karyagrah plan**, and a role that includes Instagram. Admins and managers have it by default.
- [ ] No documents are needed.

2.3.1 Steps: connect Instagram

1. Check the branch name at the top. Open **Instagram Comments**.
2. Click **Connect Instagram account**. The browser goes to Facebook.
3. Sign in to Facebook with the login that manages your Page.
4. On Facebook's screens, pick your Page and your Instagram account **by name**. Do not choose "all current and future". Allow everything it asks for.
5. Facebook sends you back. The card shows your Instagram name, the Page it comes through, and **Active**.
6. Read the notice under the card. If it says **No bot is answering Instagram messages yet**, messages are saved but nobody replies on their own. Either open **Bot Builder**, set a bot's channel to Instagram and make it Active, or let your team answer each chat.

7. From another Instagram account, send a message to your account. It should appear in **All Inbox**.

2.3.2 After it is connected

- **Messages** are in **All Inbox**, next to your WhatsApp and Messenger chats.
- **Comment rules** are on the Instagram Comments page. A rule has keywords, a public reply shown under the comment, and a private message to the person who commented. You can use one or both. If the person answers the private message, your bot or your team carries on in the chat.
- **Who answers.** Admins and managers can answer Instagram chats from the start. The Agent role that comes with a new account does not include Instagram. To let agents answer, add Instagram to their role (Chapter 3).

> **Meta's rules for Instagram messages**
>
> You can reply to a person only within 24 hours of their last message to you. Instagram has no templates and no broadcasts, so you cannot write first or send one offer to all followers.

2.3.3 Disconnect or delete

- **Disconnect** stops receiving and sending. The conversations and rules are kept, and you can still read them in All Inbox. **Connect again** with the same account carries on from there.
- **Delete from Karyagrah** appears after a disconnect, for admins. It removes what Karyagrah stored for that account. Use it only when you are sure.

If the card shows a red message, click **Reconnect** and go through the Facebook steps again.

2.4 Messenger

Connecting Messenger brings the messages of your Facebook Page into **All Inbox**. A bot or Sahayak can answer them, and your team can take over. You connect on the page **Messenger Setup**, in the group **Messaging**.

Keep ready for Messenger

- ☐ **The Facebook Page** that your customers message.
- ☐ **A Facebook login with a role on that Page that can reply to messages**: admin or full control.
- ☐ **Messenger in your Karyagrah plan**, and a role that includes Messenger. Admins and managers have it by default.
- ☐ No documents are needed.

2.4.1 Steps: connect Messenger

1. Check the branch name at the top. Open **Messenger Setup**.
2. Click **Connect Facebook Page**. The browser goes to Facebook.
3. Sign in, pick your Page, and allow everything it asks for.

4. Back in Karyagrah, if you manage several Pages, a box **Choose your Facebook Page** opens. Click the Page your customers message.
5. The card shows the Page name and **Active**.
6. Read the notice under the card, as for Instagram. Set a bot to the Messenger channel, or let your team answer.
7. From another Facebook account, send a message to your Page. It should appear in **All Inbox**.

A Page that cannot be chosen shows the reason under its name:

Reason shown	What to do
Your Facebook role on this Page can't reply to messages.	Ask the owner of the Page to give you a higher role, or let the owner connect it.
Already connected to another account.	The Page is in use in another Karyagrah account. Contact support.

> **Meta's rules for Messenger**
>
> A Page can reply to a person only within 24 hours of their last message to it. After that, you can write again once they write to you. Messenger has no broadcasts.

Comments on Page posts. Automatic replies to comments on your Facebook posts are marked **coming soon**. They need one more approval from Facebook. Messages work today.

Disconnect and **Delete from Karyagrah** work the same way as for Instagram. As with Instagram, add Messenger to the role of the agents who should answer.

2.5 Other ways customers can reach you

These are not Meta channels, so there is nothing to verify with Meta. Chapter 5 describes each one.

- **Website chat.** A chat bubble on your own website. Your bot or Sahayak answers, and your team can take over. **Bot Builder** gives you the small piece of code for your website. Chats arrive in **All Inbox**.
- **Shared email.** One mailbox, such as support@ or sales@, answered by the team. Set it up in **Email**.
- **WhatsApp calls.** Voice calls on your WhatsApp number, answered by your team or by Sahayak. See **Calls**. Karyagrah support switches calling on for your number.

CHAPTER 3

Your team

Every person who works in Karyagrah has their own login and a role. The role decides which parts of the menu they see and what they can do there. This chapter shows how to add people, give them the right access, and remove them safely.

3.1 The three levels: Admin, Manager and Agent

Every company starts with three roles. Each one stands for a level of access.

Level	Who it is for	What they get to start with
Admin	The owner, or a person the owner trusts fully	Everything the plan includes. Only the admin connects WhatsApp numbers, removes team members and manages branches.
Manager	A team lead or supervisor	Almost every module. Not included by default: WhatsApp Numbers, Plans & Billing, Settings, Roles & Permissions and Webhooks. A manager sees every chat of the branch and hands chats to the team.
Agent	A person who answers customers	The everyday screens: Dashboard, Inbox, Quick Replies, Media Manager, Knowledge Base and the shared mailbox, plus basic use of the staff tools in your plan, such as attendance, tasks, bookings and orders. An agent sees customer phone numbers with the last four digits hidden.

You can change what the Manager and Agent roles include, and you can make your own roles.

3.2 Roles and permissions

A role is a named set of permissions, such as "Front Desk" or "Accountant". Make roles for jobs, not for single people. Open **Roles & Permissions** in the group **Team & Access**.

1. Click **New Role**. Give it a **Name** and a short **Description**.
2. Choose the **Access level**: Agent, Manager or Admin. The role starts from that level.
3. Under **Module Permissions**, turn on each module this job needs. Only the modules in your plan are shown.
4. Inside each module, pick exactly what the role may do: for example **View**, **Create**, **Edit**, **Delete**, **Import**, **Export**, **Send** or **Approve**. Each module has its own list.
5. Some modules, such as Attendance and Tasks, also ask how much the person **sees**: **Own records only**, **Their team**, **Whole branch** or **Whole company**.
6. Save. You see **Role saved**. People with this role get the change when they reload the page.

Three rules that keep access safe

- Give each person the smallest role that lets them do their job.
- Give the Admin level only to real owners. It opens everything.
- In the Inbox and other messaging modules, a person who can open the module can usually also send. If someone must only watch, use **Monitoring** instead.

3.3 Add a team member

Admins and managers can add people. Open **Team** in the group **Team & Access**.

1. Check the branch name at the top. The person is added to that branch.
2. Click **Add Member**.
3. Type the **Full Name** and the **Email**. Each person needs their own email address. One email is one login.
4. Choose the **Role**.
5. Choose **Reports To**: the person's manager. Choose "Top level / no manager" for the head of the team.
6. Save. A temporary password is emailed to the person. If the email could not be sent, the screen shows the temporary password for you to pass on safely.
7. The person signs in and sets their own password.

How many people can you add?

Your plan sets how many team members a branch may have. When the limit is reached, the screen says so. Upgrade the plan or add more team members from **Plans & Billing**, tab **Add-ons**.

3.4 Who sees which chats

This is the rule people ask about most.

- **An agent sees only the chats assigned to them.** They do not see a colleague's chats, and they do not see chats that nobody has been given yet.
- **Managers and admins see every chat** of the branch. New chats that nobody owns wait with them. They hand chats to the team, one at a time or many together.
- The same rule applies on WhatsApp, Instagram, Messenger and website chat, on the website and in the phone app.
- **Instagram and Messenger need to be in the person's role.** The Agent role that comes with a new account does not include them. To let an agent answer Instagram or Messenger chats, add those modules to the agent's role.

Handing chats out automatically. In **Settings**, tab **Chat Settings**, switch on **Auto Assignment** and **Round Robin**. New chats are then given in turn to the agents who are online, which means signed in with Karyagrah open. If the admins also answer chats, switch on **Assign to company admins too**.

Working from one shared queue. Some small teams want every agent to see every chat. In **Settings**, tab **Chat Settings**, switch off **Agents see only their own chats**. From then on every agent sees every chat of the branch.

Setting	On	Off
Agents see only their own chats	An agent sees the chats assigned to them and no others. This is how a new account starts.	Every agent sees every chat of the branch.
Auto Assignment with **Round Robin**	New chats go to online agents in turn.	New chats wait until a manager or admin assigns them.

3.5 Reporting lines

Reports To sets who a person's manager is. It is separate from permissions. Karyagrah uses it wherever a role sees "Their team": a manager with that view sees the records of the people who report to them. The **Reporting tree** on the Team page shows the whole structure.

Set **Reports To** for everyone. A manager with nobody reporting to them sees only their own records in those modules.

3.6 Team members and branches

A team member belongs to one branch and works in that branch. The company admin can switch between all branches with the branch name at the top of the screen. To give a second shop its own staff, first add the branch (Chapter 1), switch to it, and then add its team members there.

3.7 The phone app for your staff

The staff app is called **Karyagrah**. It is being published on Google Play. If you cannot find it in the store yet, ask Karyagrah support for the link.

What staff need for the app

- ☐ A login made for them on the **Team** page. There is no sign-up inside the app.
- ☐ Their own email and password, the same as on the website.

What your staff can do in it, depending on your plan and their role:

Part of the app	What it does
Home	Chats waiting, overdue tasks, today's follow-ups and today's bookings at a glance
Chats	Reply to WhatsApp, Instagram and Messenger chats. Send text, photos, videos, documents, voice notes and approved templates. Use quick replies and private notes. Assign, transfer or close a chat
Leads	See leads and their history, add a lead, move it to the next stage, write notes

Part of the app	What it does
Work	Tasks with a photo as proof, bookings, attendance (punch in and out, apply for leave), orders, stock, quotations, classes and a calendar
Sahayak	Ask the assistant about your work, by typing or by voice

Good to know:

- A login works on **one phone at a time**. Signing in on a second phone signs out the first.
- **App Lock** protects the app with the phone's fingerprint, face or passcode. Ask staff to switch it on.
- The app asks for the camera, microphone, location and notifications only for the features that need them. Location is attached to attendance and field check-ins only when your workplace asks for it.
- A person can ask for their login to be deleted from inside the app: **Me**, then **About**, then **Request account deletion**.

3.8 When a person leaves

You have two choices on the **Team** page.

Choice	What happens	Use it when
Set **Status** to **Inactive**	The person is signed out and cannot sign in again. Their history stays. They still use one seat of your plan.	The person is away for some time, or you want to stop access at once and decide later.
Remove	The login is deleted. The person is signed out everywhere, on the website and on the phone. Their chats go back to the queue for someone else. The people who reported to them move up one level. The seat becomes free.	The person has left for good.

Only the company admin can remove a team member. Removing cannot be undone. The chats the person handled are not lost: they stay in your account and wait for a new owner.

3.9 Keeping logins safe

- **One login per person.** Shared logins sign each other out, and you can no longer tell who did what.
- **Active Sessions** (group **Billing & Settings**) lists the devices where you are signed in. Sign out any device you do not know.
- **Sign-in History** lists your recent sign-ins, including failed ones.
- **Change your password** in **Settings**, tab **Security**. Use at least 8 characters.
- If a phone or laptop is lost, sign that device out in **Active Sessions** and change the password. If the person has left, remove them on the **Team** page.

CHAPTER 4

Settings

Most settings are on one page: **Settings**, in the group **Billing & Settings**. A few have a page of their own in the menu. This chapter goes through all of them. Settings are normally changed by the admin. Managers and agents do not see the Settings page unless their role includes it.

4.1 The Settings page, tab by tab

Each tab has its own save button. Save before you leave a tab.

4.1.1 Branch

This tab is about the branch chosen at the top of the screen.

- **WhatsApp Journey** shows, in six steps, how far the WhatsApp connection of this branch has come. The last step is **Messaging Live**.
- **Starter Pack** gives a new branch a ready start. Choose your **Business Vertical** (your kind of business) and click **Initialize Starter Pack**. It creates templates, a guided flow, bots, quick replies and a guide article that suit that kind of business. Where possible the templates are sent to Meta for approval by themselves. No sample chats are created. The Starter Pack unlocks after a WhatsApp number is connected.
- **Branch Info** holds the branch name, code, location, timezone and status. Below it are the lists of the branch's members and WhatsApp numbers.

4.1.2 Company

The name of your company and its status.

4.1.3 Chat Settings

This tab decides how chats are shared and what is sent automatically. It has a part for **WhatsApp**, and parts for **Instagram** and **Messenger** when your plan includes them.

Setting	What it controls
Auto Assignment and **Round Robin**	New chats are handed to online agents in turn. Switch on **Assign to company admins too** if the admins also answer chats.
Agents see only their own chats	On: an agent sees only the chats assigned to them. Off: every agent sees every chat of the branch. Chapter 3 explains this.
Bot silence after a human reply	How long the bot stays quiet in a chat after a person has replied. You can also choose that the bot never returns until someone restarts it from the inbox.
Away message	An approved template that is sent when a customer writes outside your business hours.
Holiday Mode	While it is on, every incoming chat gets your holiday message.

Setting	What it controls
Offline Bot	A bot that answers when all your agents are offline.
Send automatic customer replies	The main switch for the automatic messages above.
Show lead Mark in chats	Adds a flag button in the Inbox, so the team can set a lead's stage from a chat. Leave it off if lists and follow-ups are enough for you.
Session expires after inactivity	How many minutes a person can be idle before they are signed out.
Lists	Coloured labels for chats, such as "Hot lead" or "Payment pending". Create them here with **New list**. Each channel has its own lists.

The **Instagram** and **Messenger** parts hold the same kind of rules for those channels: automatic assignment, how long the bot stays quiet after a person replies, a welcome message, an away message, and their own lists.

4.1.4 Business Hours

Switch on **Enable Business Hours**, then set the **Start Time**, the **End Time** and your **Business Days**. Outside these hours a customer gets your away message.

The same tab holds the **Commerce Connector**. It lets a bot look up the status of an order in your own shop system. It is an advanced setting. Leave it to your developer.

4.1.5 Notifications

Enable Notifications switches the in-app notifications for new messages and events. They appear under the bell at the top of the screen.

4.1.6 Plan & Limits

A summary you can read but not change here: the plan of the branch, how many team members it allows, the billing cycle and the status. To change the plan, open **Plans & Billing**.

4.1.7 Billing Details

Your country, tax number, billing address, city, state and pincode. They are printed on your invoices. Fill them before your first payment.

4.1.8 Security

Change your own password here.

4.1.9 Calendar sync

Each person can connect their own Google Calendar with **Connect Google Calendar**. Their follow-ups, bookings and tasks then also appear in Google Calendar. A switch lets events on the person's own Google calendar block bookings in Karyagrah. This tab is personal: everyone connects their own calendar, and nobody else's.

4.1.10 Roles & Permissions

The same role editor as the page **Roles & Permissions** in the menu. Chapter 3 explains it.

4.2 Settings that have their own page

Page	Group in the menu	What it controls
Plans & Billing	Billing & Settings	Your plan, the free trial, add-ons and payments
Billing History	Billing & Settings	All your invoices
WhatsApp Numbers	Team & Access	Connecting, testing and removing WhatsApp numbers
Branches	Team & Access	Adding, suspending and deleting branches
Team	Team & Access	Your people, their roles and their status
Roles & Permissions	Team & Access	What each role may see and do
Integrations	Automation	Your payment gateway, your courier, the AI wallet, and tools such as Google Sheets, Zoho CRM, Zapier, Shopify and WooCommerce
Audit Log	Billing & Settings	A record of sensitive changes: plans, roles, billing
API Keys and **API Docs**	Billing & Settings	Keys and instructions for your developer
Active Sessions	Billing & Settings	The devices where you are signed in
Sign-in History	Billing & Settings	Your recent sign-ins
Data Export	Billing & Settings	A copy of your company's data

Chapter 5 describes each of these pages.

4.3 Deleting data and closing an account

You want to	Where
Delete one customer's data, because they asked	**Contacts**. Open the contact and choose to erase everything held about this customer. You can keep only their number on the do-not-message list, so they are never messaged again. Orders, invoices and payments are not touched, because you may be required to keep them.

You want to	Where
Stop marketing messages to one customer	**Contacts**. Mark the contact as not wanting marketing messages. Campaigns and drip campaigns then skip them.
Remove a staff login	**Team**, then **Remove**. A person can also ask from the phone app: **Me**, **About**, **Request account deletion**.
Remove a connected Instagram account or Facebook Page	On the channel's own page: **Disconnect**, then **Delete from Karyagrah**.
Take a copy of your data first	**Data Export**
Delete your whole account, or anything not listed here	The page **karyagrah.com/data-deletion** explains how, and what is kept and for how long.

CHAPTER 5

The modules, one by one

A module is one part of Karyagrah, such as the Inbox, Templates or Orders. Each one has a menu item on the left. This chapter follows that menu, from top to bottom, with its real group names. For each module it says what it is for, what you do in it day to day, and which other modules it works with.

> **What you see depends on your plan and your role**
>
> Not every client sees every item. Karyagrah is sold as plans and add-ons, and each person has a role.
>
> - An item with a **padlock** is not in your plan. Click it to see how to add it.
> - An item that is **missing** is not allowed for your role. Ask your admin (Chapter 3).
> - An item marked **Coming soon** is not on sale yet.
> - The Agent role that comes with a new account starts with the everyday screens only. The admin can add more.
>
> Open **Plans & Billing** to see what your plan includes.

5.1 Overview

5.1.1 Dashboard

What it is for: Your starting page. It shows how the day is going.

Day to day:

- Managers and admins see a **Business Overview** and how the team is doing, plus **Quick Actions** that jump to the common jobs.
- Agents see their own queue and their own activity.

Works with: All Inbox, Contacts, Campaigns, Templates and Team, which it links to.

5.1.2 Monitoring

What it is for: To watch live chats without taking part. Chats open in read-only mode.

Day to day:

- Filter by status: **All Status**, **Assigned**, **Waiting** or **Resolved**.
- Open **Unassigned Chats** to see chats that nobody owns yet.
- Leave a note for the agent. The agent sees it in the chat timeline.

Works with: All Inbox (the chats), Team (the agents).

5.1.3 Activity Log

What it is for: A record of what your team did today and this week: messages sent, chats closed or transferred, contacts added, templates created, members added or removed.

Day to day: Filter by **All Members**, **All Categories** or **All Actions**. The charts show the most active people and the busiest categories for the last 7 days.

Works with: Team and every module whose actions it records. It is not the **Audit Log**, which keeps sensitive company changes such as roles and plans.

5.2 Messaging

5.2.1 All Inbox

What it is for: The one list where your whole team reads and answers customers. WhatsApp, Instagram, Messenger and website chats are all here.

Day to day:

- Use the tabs at the top to see **All** chats or one channel. A channel that is not in your plan shows a padlock.
- Search by name or number. Filter by status (**All Chats**, **Open**, **Assigned**, **Resolved**, **Unassigned / closed**), by person, by list, and by follow-up.
- Open a chat and reply. Use quick replies, templates, files, notes and buttons from the toolbar next to the text box.
- Give a chat to a colleague, or close it when it is done.
- Put a coloured **list** on a chat, set one **follow-up** reminder, or schedule a template to go out later.
- A note shown in yellow is **Internal Note**. It is never sent to the customer. Check the colour before you press Send.
- On Instagram and Messenger, **Take over** pauses the bot so you can reply, and **Hand back to bot** returns the chat to it.
- The link **WhatsApp tools** opens the WhatsApp inbox page, where you start a new chat to someone.

Works with: Templates and Quick Replies (what you send), Media Manager (files), Bot Builder and AI Agents (they answer first), Lead Management (a chat can open a lead), Contacts (suggested when you start a chat), Calls (the call button in a chat).

> **The 24-hour rule**
>
> On WhatsApp you can send normal messages only for 24 hours after the customer's last message. After that, only an approved template. Instagram and Messenger also allow a reply only within 24 hours.

5.2.2 Website Inbox

What it is for: Answering visitors who chat with the bubble on your website. Their chat starts with your bot or Sahayak.

Day to day: Open a conversation, press **Take over** to pause the bot, reply, then press **Return to AI** when you are done. Always take over before you reply.

Works with: Bot Builder (the bubble runs a bot), AI Agents, Lead Management (visitors are saved as leads).

If your plan has the Inbox, website chats are in the **Website** tab of All Inbox, and this item is hidden from the menu. It shows in the menu on a plan that does not have the Inbox.

5.2.3 Instagram Comments

What it is for: Connecting your Instagram account and replying to comments on your posts by rule. Your Instagram messages are in All Inbox.

Day to day:

- Connect the account once (Chapter 2).
- Add comment rules: keywords, a public reply under the comment, a private message to the commenter, or both.
- Check that a bot is active for Instagram, or answer chats yourself.

Works with: All Inbox (the messages), Bot Builder and AI Agents (the replies), Settings, tab Chat Settings (assignment and welcome messages for Instagram).

5.2.4 Instagram Posts

COMING SOON Not on sale yet.

What it is for: Planning and scheduling Instagram posts, with a caption and a picture drafted for you each day to review.

Works with: Instagram Comments (the same account) and the AI wallet.

5.2.5 Website Builder

What it is for: A simple website for your business, made from a template. It goes live on a free address, works well on a phone and is ready for Google.

Day to day:

- Pick a look. Karyagrah fills in your name, phone and address.
- Add your words and pictures, or press **Write it for me** to let AI draft the text.
- Use the tabs: **Content**, **Look & pages**, **Products**, **Google ranking**, **Domain** and **Enquiries**.
- Publish. A change shows on the live site only after you publish it again.

- Read the messages sent from your website's form on the **Enquiries** tab.

Works with: Catalog (the products on your site).

5.2.6 Google Business

COMING SOON Not on sale yet.

What it is for: Reading and answering your Google reviews, posting updates and offers, and seeing how many people call, visit or ask for directions.

5.2.7 Messenger Setup

What it is for: Connecting your Facebook Page. Your Messenger chats arrive in All Inbox.

Day to day: Connect the Page once (Chapter 2). After that, answer from All Inbox, or let a bot or Sahayak answer. Automatic replies to comments on Page posts are coming soon.

Works with: All Inbox, Bot Builder, AI Agents, Settings.

5.2.8 Email

What it is for: One team mailbox, such as support@ or sales@, answered by the whole team.

Day to day:

- An admin connects the mailbox once. A company has one shared mailbox.
- New mail is handed to the teammate with the fewest open conversations, or left for the team to pick. Admins see all mail.
- Reply from here with canned replies, signatures and attachments. Add internal notes, labels and rules, or snooze a conversation.

Works with: Team (mail is shared out to people).

5.2.9 Calls

What it is for: Voice calls on your WhatsApp number, answered by your team or by Sahayak. The page shows the call history.

Day to day:

- Karyagrah support switches calling on for your number. Until then the page says so.
- Choose who answers when a customer calls: only your team, your team first and then Sahayak, or Sahayak first.
- To call a customer, click **Call** in their chat. The customer must first allow calls. Ask for permission from the chat if they have not.
- You can switch recording on, and read a transcript of a call.

Works with: All Inbox (the call button and the call entry in the chat), AI Agents and the AI wallet (Sahayak's minutes use your tokens). Calls do not work on a number in Coexistence Mode.

5.2.10 Templates

What it is for: Messages that Meta approves once. After approval you can send them to customers who agreed to hear from you, even after the 24-hour window.

Day to day:

- Write a template with a header, body, footer and buttons. A phone preview shows how it will look.
- Click **Submit for Approval**. The status moves from draft to pending to approved, or rejected. Meta usually answers within a day, but do not promise a time.
- If it is rejected, edit it and submit it again.
- Use approved templates in the inbox, in campaigns, in drip campaigns and in bots.

Works with: All Inbox, Campaigns, Drip Campaigns, Bot Builder, Catalog (product buttons).

> **Meta's rules for templates**
>
> Only approved templates can be sent. Once reviewed, a template's name and language cannot be changed. Do not delete an approved template to rebuild it, because Meta then blocks that name for 30 days. Edit it, or make a new one with a new name. Karyagrah does not show the quality rating: check it in Meta's WhatsApp Manager.

5.2.11 Contacts

What it is for: Your customer address book for the branch: phone, name, email and tags. It sits in Messaging, just above Campaigns, because it is the list your messages and campaigns go to.

Day to day:

- Click **Add Contact**, or import a CSV or Excel file. You see a preview first, and the file can have up to 10,000 rows. Duplicates are found by phone number.
- Always write the phone number with the country code, for example 919876543210.
- Add **tags**, such as "customer" or "marketing-ok", to build groups of people. Pick a tag later when you make a campaign.
- Export the list as a file when you need a copy.
- When a customer asks to stop marketing messages, mark the contact as not wanting them. Campaigns and drip campaigns then skip that person.
- When a customer asks you to delete their data, erase everything held about them.

Works with: Campaigns and Drip Campaigns (who gets the message), All Inbox (**Start new chat** suggests contacts), Lead Management.

The default Agent role cannot open Contacts. Give it to an agent through a role (Chapter 3).

5.2.12 Campaigns

What it is for: Sending one approved template to many people, then seeing who received and read it.

Day to day:

- Choose the template and the people: from your contacts, a pasted list, or a file.
- Fill in the blanks of the template, such as the name, for each person.
- Send it now, schedule it for a time, or set it to repeat weekly or monthly.
- Open the report. It shows Pending, Sent, Delivered, Read and Failed, and you can download it.
- Replies come into All Inbox.

Works with: Templates (only approved ones), Contacts (who to send to), All Inbox (the replies).

> **Meta's rules for campaigns**
>
> Message only people who agreed to hear from you. Meta limits how many new people a business may start a chat with in 24 hours, and a new business starts low. Meta charges for each template message that is delivered, and bills it to your own WhatsApp account. A person who is listed twice gets two messages, so remove duplicates first.

5.2.13 Interactive

What it is for: Messages the customer can tap, instead of typing: reply buttons, lists, link buttons, products and Flows. They need no approval from Meta.

Day to day: Build a message, check the phone preview, save it. In a chat, an agent clicks **Send Interactive Message**. The customer's tap comes back into the chat. Bots can send them too.

Works with: All Inbox, Bot Builder, Flows, Catalog (product messages).

These messages work only inside the 24-hour window. For a broadcast, use a template with quick-reply buttons instead.

5.2.14 Flows

What it is for: A small form inside WhatsApp that the customer fills in by tapping, with text boxes, drop-downs and date pickers. For example a booking or an enquiry form.

Day to day:

- Build the screens. Karyagrah checks your work as you go.
- Press **Save Flow**, then **Publish to Meta**. When the status is **Active** and the button says **Re-publish**, it is live.
- An agent sends it from a chat, or a bot sends it with a **Send Flow** step. The customer's answers show in the chat as one tidy card.

Works with: All Inbox, Bot Builder, Drip Campaigns, Interactive.

A published Flow cannot be changed on Meta. If you need a different form, build a new Flow and switch your bots to it.

5.2.15 Quick Replies

What it is for: Saved answers to questions you get again and again, such as timings, address or fees.

Day to day: Save a reply with a shortcut such as `/timing`. In a chat, type `/` and pick it from the list. Use **Insert** when you want to edit the words before sending.

Works with: All Inbox. Quick replies are plain text, so use Interactive messages or Media Manager when you need buttons or files.

5.3 CRM

5.3.1 Lead Management

What it is for: Collecting every enquiry in one place, giving each lead an owner, and moving it from **new** to **won** or **lost**.

Day to day:

- Leads arrive from forms, webhooks, a file import, a bot, Sahayak, or by hand. Visitors of your website chat are saved as leads too.
- A lead **campaign** is a bucket for one source or one drive. It is not a WhatsApp broadcast.
- Each lead gets an owner by rule, in turn, or by hand. A duplicate check stops the same person from being added twice.
- Move the lead through its stages: **new**, **contacted**, **qualified**, **proposal**, **won**, **lost**.
- Write notes and set the next follow-up date. Every call, note and change is kept in the lead's history.

Works with: Follow-ups (the dates), All Inbox (open the chat of a lead), Bot Builder and AI Agents (they create leads), Drip Campaigns (they can start from a lead), Quotations, Templates.

5.3.2 Follow-ups

What it is for: Showing each person whom to call today, which lead is hottest, and how the team is doing.

Day to day:

- Open the month calendar. Today's follow-ups and the late ones come first.
- A lead's score and a time badge show which one to call first. A lead that nobody has touched for some days is marked **stale**.
- Managers read the dashboard with totals, charts and a team table.

Works with: Lead Management (the follow-up dates come from there).

This page is for leads. The reminder you set on a chat in All Inbox is a separate tool.

5.3.3 Quotations

What it is for: Making a GST quotation, sending it, and seeing when the customer opened and accepted it.

Day to day:

- Click **New quotation**. Pick items from your catalog or type your own, and add GST.
- Send it on WhatsApp or by email. The customer opens it on a link and can accept it there.
- Quotations that Sahayak makes in chats appear here too.
- Set your number prefix, validity, terms, bank details and colour in the quotation settings.
- Turn an accepted quotation into an order.

Works with: Catalog (items and prices), Orders (an accepted quotation becomes an order), AI Agents.

5.3.4 Drip Campaigns

What it is for: Sending a timed series of messages to each person over days, to follow up automatically.

Day to day:

- Create a drip, add its steps and the wait before each one, then activate it.
- People are added by hand, or automatically from Lead Management when a lead arrives or changes status.
- A drip stops by itself when the customer replies, or when a person takes over the chat.
- Use approved templates for steps that may go out after the 24-hour window.

Works with: Lead Management, Templates, Contacts.

Do not add or remove steps in a drip that is running. People may skip or repeat a message.

5.4 Commerce

5.4.1 Catalog

What it is for: Your product list in one place. Customers see it as tappable product cards in WhatsApp.

Day to day:

- Add products with a name, photo, price, category, stock, and sizes or colours.
- To show native product cards, paste the Meta Catalog ID in the Catalog settings and click **Sync to WhatsApp**.
- Without a Meta catalog, bots still send products as photo messages with a caption.
- A branch has one catalog. Products are not shared between branches.

Works with: Orders, Inventory, Quotations, Website Builder, AI Agents and Bot Builder (they read the same prices), Interactive messages (product messages), and the Shopify, WooCommerce and Google Sheets connections in Integrations.

A number in Coexistence Mode cannot sync a catalog with Meta.

5.4.2 Orders

What it is for: One page where you see every customer order and move it forward. The customer gets a WhatsApp message at each step.

Day to day:

- Orders arrive from chats, from your website, or you type them in.
- Move each order along: **Placed**, **Confirmed**, **Packed**, **Out for delivery**, **Delivered**. It can be **Cancelled** at any open step.
- Record money received: advance, part payment and balance, each with a receipt number.
- Print a one-page bill.
- Open **Store rules** to set how you handle cash on delivery, delivery, tax and returns.
- Use the other tabs: **Returns & exchanges** for customers who send something back, **Credit** for business customers who pay later, and **Automations** for cart reminders and cash-on-delivery confirmation. Automations are off until you switch them on.

Works with: Catalog (the items), Inventory (stock comes off when an order is placed, and goes back if it is cancelled), Quotations, and the payment gateway and courier you connect in Integrations.

5.4.3 Inventory

What it is for: Your stock book. It shows how much of each item you have, and where.

Day to day:

- Record stock arriving, stock used and stock sold. Each change is a line with a reason and a person, and nothing is erased.
- Stock never goes below zero. Karyagrah refuses and tells you how much there is.
- Keep several places, such as a store room and a counter. Track batches and expiry dates.
- Do a stock-take to count the shelf. You get alerts when stock is low or about to expire.

Works with: Catalog (products become items), Orders (stock comes off), Tasks (materials used on a job), Employees (staff can record stock on WhatsApp).

5.5 Operations

5.5.1 Appointments

What it is for: The booking diary of your business: doctor slots, salon chairs, classes, site visits or tables.

Day to day:

- Set up your services, the people who give them, and working hours.
- Add a booking for a free slot. Two customers can never take the same slot.
- The customer gets a WhatsApp reminder a day before and two hours before, and the staff member is alerted.
- Take a deposit through your own payment gateway, and record cash and refunds.

- Sahayak can take bookings on WhatsApp and on your website chat. There is no public booking page link.

Works with: AI Agents (booking in chat), Attendance (shifts and approved leave close slots), Employees, Google Calendar sync (Settings), and the payment gateway.

5.5.2 Tasks

What it is for: Giving each job to a person, with a place, a time and proof of work.

Day to day:

- Create a task and assign it. Ask for a photo, a location at the site, or both, as proof.
- Follow the board: **Open**, **Assigned**, **In progress**, **Overdue**, **Done today**, **To verify**.
- Repeat jobs can come back every day, week or month.
- The manager verifies finished work. The task keeps a timeline of who did what, when and where.
- Staff without a login get their tasks on WhatsApp. Staff with a login use the phone app.

Works with: Employees (every task goes to an employee), Inventory (materials used), Attendance (a task started at the site can count as IN), Team Performance.

5.6 People

5.6.1 Employees

What it is for: One list of everyone who works for you, with or without a login. An employee record is not a login. A shop can have forty staff records and three logins.

Day to day:

- Add a person with phone, role, department, joining date and who they report to.
- Invite them on WhatsApp. They reply **YES** once on your business number. After that, short words such as `IN`, `OUT` and `LEAVE` work for free.
- Admins also keep pay and ID details here. Payroll reads them.

Works with: Attendance, Payroll, Tasks, Inventory, Team Performance. Staff messages never appear in your customer inbox.

5.6.2 Attendance

What it is for: One register where staff mark IN and OUT, with shifts, leave and overtime, ready for salary at month end.

Day to day:

- Staff punch from WhatsApp, the staff portal, the phone app, a kiosk tablet, a biometric device file, or a manager marks it by hand.
- Karyagrah works out each day: present, half day, absent, leave, late, early leave, overtime.
- Staff ask for leave and for corrections. Managers approve.

- At month end, check the register, then **Lock month**. Locking freezes it for payroll.

Works with: Employees, Payroll (it reads the locked month), Appointments, Tasks, Members (kiosk check-in).

5.6.3 Payroll

What it is for: Working out each person's monthly pay from the locked attendance, with a payslip and a bank file.

Day to day: After the month is locked, compute, check the warnings, approve and publish. Staff read their own payslip. You download the bank file and pay from your own net-banking. Karyagrah does not move money.

Works with: Attendance (locked days and approved overtime), Employees (wages and bank details). By default only the admin can open it.

5.6.4 Members

What it is for: The register of students or members, their guardians, classes, attendance and fees. It suits schools, coaching classes, gyms and clinics.

Day to day:

- Add a student, put them in a class and a fee plan.
- Invite the guardian on WhatsApp. They reply **YES** once, and one reply covers every child on that number.
- Teachers mark attendance. The family is told when a child is absent.
- Raise fees by month, quarter, year or one time. Record part payments and print numbered receipts.
- Families see a simple web page, so they need no app.

Works with: Employees (class teachers), Attendance (kiosk check-in at the door), Appointments, and the payment gateway for fee links.

5.6.5 Team Performance

What it is for: Seeing how each person did this month, from their tasks, attendance, leads and more, or from the manager's own score, weighted the way you decide.

Day to day:

- In **Setup**, choose the categories and their weightage for each job role or department.
- In **Performance**, read each person's result for the month.
- When the month is over, press **Finalise month** to freeze the figures. You can then show the result to the employees.

Works with: Tasks, Attendance, Lead Management, Quotations and Employees, which supply the numbers.

5.7 Automation

5.7.1 Integrations

What it is for: Connecting Karyagrah to the other tools your business uses. For tools such as Google and Zoho you sign in on the other tool's own page, and Karyagrah never sees your password. For a payment gateway or a courier you add your own account keys.

Day to day:

- Connect your own payment gateway, such as Razorpay or Cashfree, to send payment links. The money goes straight to your account.
- Connect your own courier, such as Shiprocket, Delhivery, NimbusPost or Shipway, to book parcels and track them from Orders.
- Connect Google Sheets, Zoho CRM, Zapier, Shopify or WooCommerce.
- In the AI Agent section, see the balance of your AI credits wallet and add more. Every Sahayak reply uses tokens from it.

Works with: Orders (payments and couriers), Catalog (Shopify, WooCommerce, Sheets), Bot Builder (the steps that send to Zapier or Zoho), AI Agents.

Most tools need their own add-on. Each connection belongs to the branch you have selected.

5.7.2 AI Agents

What it is for: An AI helper called Sahayak. It understands what customers write and answers from your own Knowledge Base, in Hindi, English or Hinglish.

Day to day:

- Create an agent. Choose what it may do: collect lead details, book appointments, send a quotation, take orders, send payment links.
- Set when it must hand over to a person, for example on a keyword or when it is unsure.
- Attach it to a bot with the **Sahayak AI Agent** step, and choose its channels.
- Press **Save changes** after every edit. Test chat messages are real replies and use tokens.
- Check **Outcomes** every day for tickets and requests that need a person.

Works with: Knowledge Base (its facts), Bot Builder, Catalog, Appointments, Orders, Quotations, Lead Management, and the AI wallet in Integrations.

Needs: The AI Agent add-on, and tokens in the AI credits wallet. When the wallet is empty, Sahayak stops answering. Do not let Sahayak ask for card numbers or ID numbers.

5.7.3 Bot Builder

What it is for: Drawing a conversation as boxes and arrows, so a bot answers customers by itself. A bot can ask questions, show buttons, save a lead, and hand over to a person.

Day to day:

- Build the bot and choose its channel: WhatsApp, Instagram, Messenger or Website. A bot can run on several.

- Press **Save**, and set the bot to **Active**. A draft bot does not answer.
- For your website, copy the bot's embed code and paste it into your site. A chat bubble appears.
- When a person replies in a chat, the bot stays quiet for the time you set in Settings, tab Chat Settings.
- Test on a real phone, not only in the test panel.

Works with: Templates, Interactive, Flows, Catalog, Orders, Lead Management (it creates leads), AI Agents, Knowledge Base, Integrations, All Inbox (where the handover happens).

5.7.4 Webhooks

What it is for: For your developer. It lets Karyagrah send a message to your own server whenever something happens, such as a new message or a delivery tick.

Day to day: Your developer adds the server address and chooses the events. Most businesses never need this page.

Works with: API Keys and API Docs, All Inbox (the events come from chats).

5.8 Library

5.8.1 Media Manager

What it is for: Storing your pictures, PDFs, videos and audio files, so the team can send them fast.

Day to day: Upload files. Karyagrah checks WhatsApp's type and size rules before the upload starts, and a bar shows how much storage you have used. In a chat, click **Send from Media Library**.

Works with: All Inbox, Templates and carousels (their pictures come from here).

Deleting a file is permanent. A template that uses it will fail the next time it is sent.

5.8.2 Knowledge Base

What it is for: Short articles with your business facts: timings, fees, services, policies. Sahayak reads them before it answers a customer.

Day to day:

- Write one topic per article, with the answer first. You can also import a website address or a document.
- Staff can search the articles and send one to a customer from the inbox.
- Keep it up to date. Old articles are the most common reason for a wrong answer.

Works with: AI Agents, Bot Builder (the AI step), All Inbox.

Never store passwords, card numbers, ID numbers or customer data in it. Sahayak can quote what it finds.

5.9 Team & Access

5.9.1 Team

What it is for: Your people: who they are, their role, who they report to, and whether they are active.

Day to day: Add a member, edit a role, set someone **Inactive**, or **Remove** them. See Chapter 3.

Works with: Roles & Permissions, Branches, All Inbox (who owns a chat).

5.9.2 Roles & Permissions

What it is for: Deciding which modules each role sees, and what it may do inside each one.

Day to day: Click **New Role**, name it, choose its level, and tick what it may do. See Chapter 3.

Works with: Team, and every module in the menu.

5.9.3 WhatsApp Numbers

What it is for: Connecting, testing and removing the WhatsApp numbers of the branch. Only the admin sees the connect button.

Day to day: Connect your number once (Chapter 2). After that, use **Test** when you want to check it, and **Reconnect WhatsApp** if the card asks you to.

Works with: Plans & Billing (a plan must be active), All Inbox, Templates and Campaigns (they send through the number), Branches (one number per branch).

5.9.4 Branches

What it is for: Adding a branch for each shop or office. Each branch has its own plan, number, team and chats.

Day to day: Add a branch, switch between branches from the top of the screen, and **Suspend** a branch you stop using. See Chapter 1.

Works with: Team, WhatsApp Numbers, Plans & Billing.

5.10 Billing & Settings

5.10.1 Plans & Billing

What it is for: Your plan, the free trial, add-ons and payments.

Day to day: Choose a plan and billing cycle, subscribe, add or remove add-ons, and see your payments on the **Transactions** tab. See Chapter 1.

Works with: Billing History, Settings (Billing Details), WhatsApp Numbers (a plan must be active to connect).

5.10.2 Billing History

What it is for: All your invoices and payments, with downloads.

Works with: Plans & Billing.

5.10.3 Settings

What it is for: Chat rules, business hours, branch details, billing details, notifications, security and calendar sync. See Chapter 4.

Works with: All Inbox, Bot Builder, Templates, Team.

5.10.4 Audit Log

What it is for: A security diary of sensitive changes for the whole company: plan changes, role changes, API keys, numbers and billing edits. It is only for people whose role includes it.

Works with: Roles & Permissions. The **Activity Log** in Overview is the everyday work log of one branch.

5.10.5 API Keys

What it is for: For your developer. A key is a long secret that lets your own software send messages and read chats through Karyagrah.

Day to day: The admin creates a key and gives it to the developer. Treat it like a password.

Works with: API Docs, Webhooks, Contacts and All Inbox (messages sent by API appear there).

The API does not check whether a person agreed to be messaged. Getting their permission is your job.

5.10.6 API Docs

What it is for: The instructions your developer needs to use the API, with examples.

Works with: API Keys.

5.10.7 Active Sessions

What it is for: Showing the devices where you are signed in. The device you are using is marked **This device**.

Day to day: If you see a device you do not know, sign it out, and change your password.

Works with: Sign-in History, Settings (Security tab).

5.10.8 Sign-in History

What it is for: Your last sign-in attempts, successful and failed.

Works with: Active Sessions.

5.10.9 Data Export

What it is for: A copy of your company's data for backup, moving to another system, or compliance.

Day to day: Click **Request a new export**, then **Generate export bundle**. Wait until it shows **Ready**, and download it within 7 days. Passwords and secrets are blanked out.

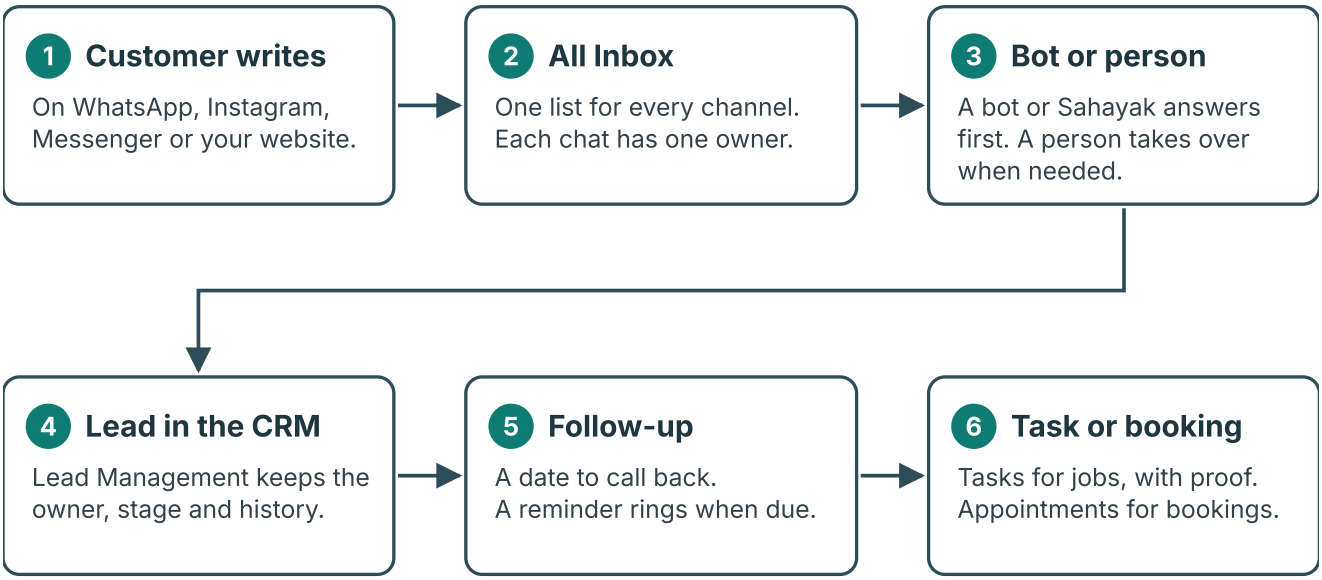
Works with: Settings. The export does not hold everything. For orders, students, payroll, tasks and appointments, use each module's own export.

CHAPTER 6

How it all links

Karyagrah is not a pile of separate tools. What you do in one module shows up in another. This chapter draws the main paths, then lists "if you do this here, that appears there".

6.1 The path of a customer message



From the lead you can also send a quotation and take an order: see the next figure.

Figure 2. A customer message becomes a chat in All Inbox, is answered by a bot or a person, can become a lead, then a follow-up, then a task or a booking.

1. A customer writes on WhatsApp, Instagram, Messenger or your website chat.
2. The chat appears in **All Inbox**, on the tab of its channel. The menu item shows a count of unread chats. The chat has one owner: the agent it is assigned to.
3. A **bot** or the **Sahayak** AI agent answers first, if one is switched on for that channel. When a person replies, the bot goes quiet for the time you set in **Settings**, tab **Chat Settings**.
4. If the customer is a possible buyer, a bot step, Sahayak or your team creates a **lead** in **Lead Management**.
5. The lead gets a follow-up date. It shows on the **Follow-ups** calendar, and the reminders ring.
6. The work for the customer becomes a **task** (a job with proof of work) or a **booking** in **Appointments**.

6.2 Reaching customers, and selling to them

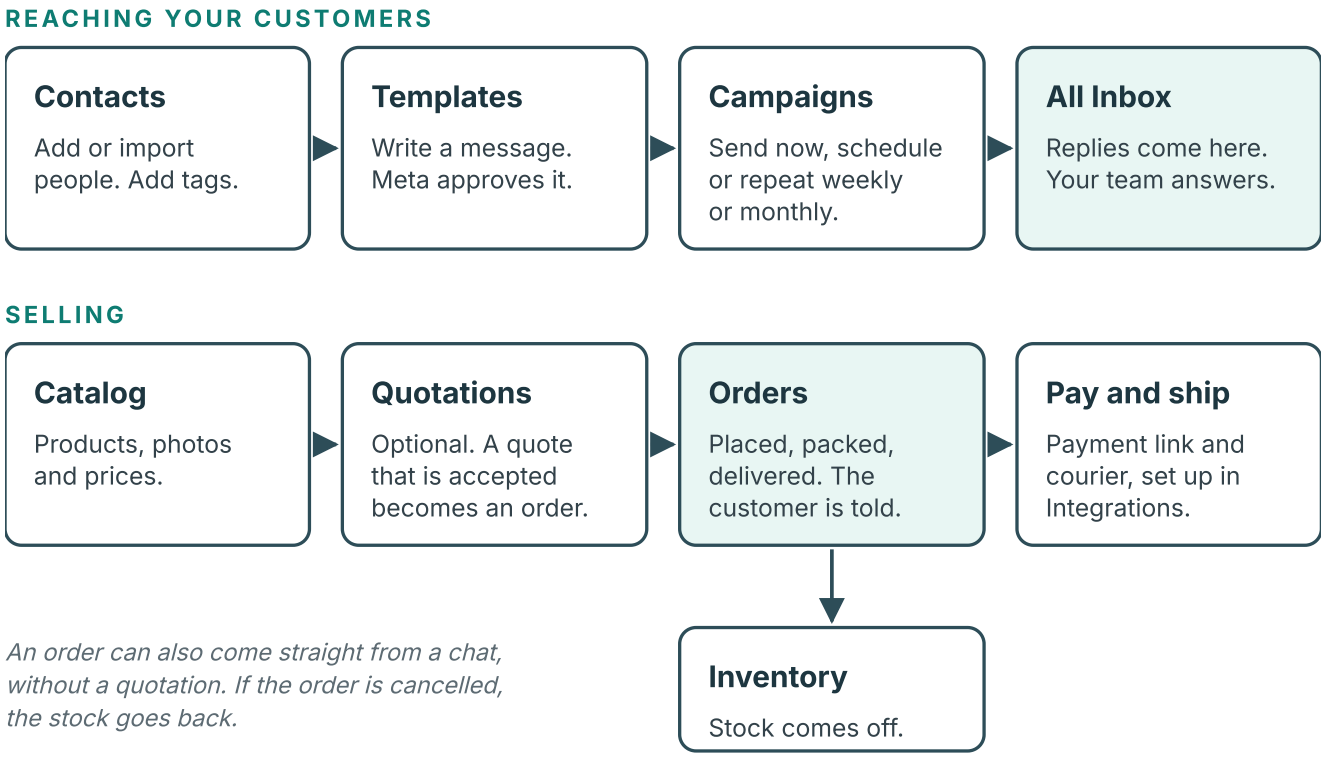


Figure 3. Two paths: Contacts to Templates to Campaigns to replies in All Inbox; and Catalog to Quotations to Orders to payment and courier, with Inventory.

Reaching customers. Keep your people in **Contacts**, with tags. Write a **template** and wait for Meta to approve it. Make a **campaign** from the template and a tag. The replies come back into **All Inbox**, where your team answers them.

Selling. Put your products in the **Catalog**. Customers see them as product cards in WhatsApp, and bots and Sahayak quote the same prices. A **quotation** or a chat becomes an **order** in **Orders**. The customer gets a WhatsApp message at each step. **Inventory** takes the stock off. Payment links and courier booking use the accounts you connect in **Integrations**.

6.3 Your people

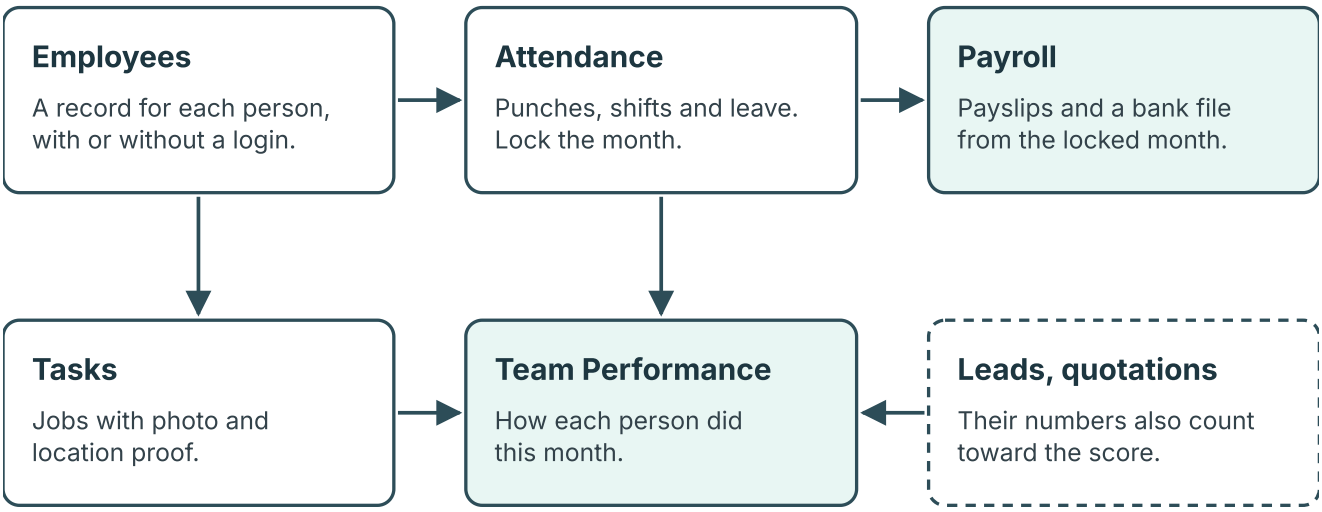


Figure 4. Employees feed Attendance and Tasks; locked Attendance feeds Payroll; Tasks, Attendance, leads and quotations feed Team Performance.

An **employee** record comes first. It is the one list of your people, and it is separate from a login. Attendance and tasks use it. After you **lock the month** in **Attendance**, **Payroll** reads it. **Team Performance** reads tasks, attendance, leads and quotations to score the month.

6.4 If you do this here, that appears there

If you do this	Here	This happens	There
A customer writes	WhatsApp, Instagram, Messenger or the website	A chat opens, with a count on the menu	**All Inbox**
Switch a bot to **Active** for a channel	**Bot Builder**	The bot answers first messages on that channel	**All Inbox**
A person replies in a chat	**All Inbox**	The bot stays quiet for the time you chose	**Settings**, tab **Chat Settings**
Turn **Agents see only their own chats** off	**Settings**, tab **Chat Settings**	Every agent sees every chat of the branch	**All Inbox**
A bot, Sahayak or your team creates a lead	**Bot Builder**, **AI Agents**, **Lead Management**	A lead with an owner and a history	**Lead Management**
Set a follow-up date on a lead	**Lead Management**	The lead shows on the calendar	**Follow-ups**
Set a follow-up on a chat	**All Inbox**	A reminder rings for you and the assigned agent	The bell at the top of the screen
Import people and add tags	**Contacts**	The tag can be picked for a campaign	**Campaigns**, **Drip Campaigns**

If you do this	Here	This happens	There
Mark a contact as not wanting marketing messages	**Contacts**	Campaigns and drips skip that person	**Campaigns**, **Drip Campaigns**
Submit a template and Meta approves it	**Templates**	It can be used in chats, campaigns, drips and bots	**All Inbox**, **Campaigns**, **Drip Campaigns**, **Bot Builder**
Send a campaign	**Campaigns**	The report shows Sent, Delivered, Read and Failed. Replies arrive in the inbox.	**Campaigns**, **All Inbox**
Add a product and press **Sync to WhatsApp**	**Catalog**	Customers see product cards. Bots, Sahayak and quotations use the same price.	WhatsApp, **Bot Builder**, **Quotations**
Accept a quotation, then convert it	**Quotations**	An order with the quoted prices	**Orders**
Place an order	**Orders**	Stock comes off. The customer gets a WhatsApp message at each step.	**Inventory**, the customer's WhatsApp
Cancel an order	**Orders**	The stock goes back	**Inventory**
Connect a payment gateway or a courier	**Integrations**	You can send payment links and book parcels	**Orders**
Write articles	**Knowledge Base**	Sahayak and the website chat answer from them	**AI Agents**, **Bot Builder**
Sahayak sends a reply	**AI Agents**	Tokens are taken from your AI wallet	**Integrations**, AI Agent section
Add an employee and invite them on WhatsApp	**Employees**	The person can punch IN and OUT and ask for leave	**Attendance**, **Tasks**, **Payroll**
Lock the month	**Attendance**	Payroll can work out the pay	**Payroll**
Finish a task with a photo	**Tasks**	The manager can verify it. It counts toward the month's score.	**Tasks**, **Team Performance**
Add a booking	**Appointments**	The customer gets WhatsApp reminders. The slot is taken.	**Appointments**, the customer's WhatsApp
Upload a file	**Media Manager**	Agents can send it from any chat	**All Inbox**
Change a role	**Roles & Permissions**	The people with that role see a different menu after they reload	The left menu
Remove a team member	**Team**	They are signed out everywhere. Their chats go back to the queue.	**All Inbox**

If you do this	Here	This happens	There
Disconnect Instagram or Messenger	The channel's own page	New messages stop. Old chats stay readable.	**All Inbox**
Connect Google Calendar	**Settings**, tab **Calendar sync**	Your follow-ups, bookings and tasks also show in Google Calendar	Google Calendar

CHAPTER 7

When something goes wrong

Most problems have a short cause. Find your problem below, try the fix, and write to support if it stays. Before you write to support, see the last section.

7.1 Signing in

What you see or what happens	Likely cause	What to do
The password is not accepted	Wrong password, or you still use the temporary one	Click **Forgot password?** on the sign-in page. A code comes to your email.
"You were signed out because your account was used on another device."	A login works on one device at a time. Someone signed in with it somewhere else.	Sign in again. If you did not do it, change your password and look at **Active Sessions**. Give every person their own login.
"This account is suspended. Please contact your admin."	The account or the branch was suspended	Ask your admin.
The captcha is unreadable	The picture is hard to read	Click the refresh icon to get a new one.
A menu item is missing	Your role does not include it	Ask your admin to change your role (Chapter 3).
A menu item has a padlock	It is not in your plan	Click it to see how to add it.

7.2 WhatsApp

What you see or what happens	Likely cause	What to do
Messages to your number do not arrive in All Inbox	The number is not **Connected**, or the plan has ended	Open **WhatsApp Numbers**, check the card, click **Test**. Check **Plans & Billing**.
The card says **Reconnect needed**	Meta no longer lets Karyagrah reach the number	The admin clicks **Reconnect WhatsApp** and allows every permission Meta asks for.
The card says **Setup Failed**	A setup row did not finish	Click **Retry Setup**. If it fails again, send the red message to support.
Setup is waiting, or **Phone link expired**	A Coexistence Mode number needs its steps on the phone	Do the four phone steps within 24 hours, then click **Check now** (Chapter 2).
You cannot send a normal message to a customer	The customer's last message was more than 24 hours ago	Send an approved template (Meta's rule).

What you see or what happens	Likely cause	What to do
Template messages are failing to send	No payment method with Meta	Add one in Meta Business Suite, WhatsApp Manager, Payment settings.
A template was rejected	Meta did not accept its wording	Edit it using Meta's reason, and submit it again. Do not delete it and make the same name again.
Customers see your number, not your name	Your display name is not approved yet	Check the name in Meta's WhatsApp Manager, and follow Meta's display name rules (Chapter 2).
A campaign did not reach everyone	Numbers without country codes, numbers not on WhatsApp, or Meta's limits for a new business	Check the report for **Failed**, fix the numbers and send those again. Split a big list over days.

7.3 Instagram and Messenger

What you see or what happens	Likely cause	What to do
The connection shows a red message	Facebook did not give every permission, or the access ended	Click **Reconnect**. Allow everything Facebook asks for.
Instagram messages do not arrive	Message access is off in Instagram, or the account is not a Professional account	In Instagram turn on "Allow access to messages" under Connected tools. Check the account type (Chapter 2).
"No bot is answering Instagram messages yet" (or Messenger)	No active bot is set to that channel	Open **Bot Builder**, set a bot's channel, make it **Active**. Or answer the chats yourself.
A Facebook Page cannot be chosen	Your role on the Page cannot reply to messages	Ask the Page owner for a higher role.
An agent cannot see Instagram or Messenger chats	The agent's role does not include the channel, or the chat is not assigned to them	Add the module to the role (Chapter 3), and check who the chat is assigned to.

7.4 Bots and Sahayak

What you see or what happens	Likely cause	What to do
The bot does not answer	It is a draft, not saved, or set to another channel	Open the bot, press **Save**, set it **Active**, and check its channel.
The bot went quiet in one chat	A person replied there recently	The bot returns after the time set in **Settings**, tab **Chat Settings**. In the chat you can start the bot again.
Sahayak stopped answering	The AI wallet has no tokens left	Open **Integrations**, AI Agent section, and add credits.

What you see or what happens	Likely cause	What to do
Sahayak gives a wrong answer	The Knowledge Base is missing the fact, or has an old one	Fix or add the article in **Knowledge Base**.

7.5 Chats, team and billing

What you see or what happens	Likely cause	What to do
An agent says a chat is missing	Agents see only the chats assigned to them	Assign the chat, or switch off **Agents see only their own chats** in **Settings** (Chapter 3).
A new chat is not given to anyone	**Auto Assignment** is off, or nobody who can answer is online	Check **Settings**, tab **Chat Settings**. Check that the agents' roles include the channel.
A person left the company	Their login is still open	In **Team**, click **Remove**. They are signed out everywhere and their chats go back to the queue.
Payment was taken but the plan is not active	The payment is still being confirmed	Do not pay again. Your plan or add-on switches on within a few minutes. If it does not, write to support with the payment id.
Sending stopped	The plan has ended	Renew in **Plans & Billing**. Sending resumes. Renew before the reminder emails run out, or your channels are disconnected (Chapter 1).
The phone app says it signed out	The same login was used on another phone, or the app is not part of your plan	Sign in again. If it says the app is not in your plan, ask support.

7.6 Before you write to support

Send these, in one message to **support@karyagrah.com**, or call **+91 93106 93650**:

- Your company name and branch name.
- What you were trying to do, and what happened instead.
- The exact words of any red message. A photo of the screen is best.
- The time it happened, and the phone number or customer concerned.

Never send your password or a one-time code to anyone, including Karyagrah staff.

Glossary

The words used in this guide, in alphabetical order.

Word	What it means
24-hour window	The time after a customer's last message when you may reply with a normal message. After 24 hours only an approved template can be sent. It is Meta's rule.
Add-on	An extra feature or extra capacity that you add to your plan.
Admin	The top level of access. The owner of the company is the admin.
Agent	The level of access for a person who answers customers.
All Inbox	The one list where chats from WhatsApp, Instagram, Messenger and your website come together.
API	A way for your own software to talk to Karyagrah without a person clicking. For developers.
Approved	A template that Meta has accepted. Only approved templates can be sent.
Assign	Give a chat to one person. That person is its owner.
Auto Assignment	A setting that gives new chats to online agents in turn.
Billing cycle	How often a plan is paid for, for example monthly or yearly.
Bot	A set of automatic replies that you draw in Bot Builder. It answers customers by itself and can hand over to a person.
Branch	A shop, office or team inside your company. It has its own plan, number, team and chats.
Broadcast	One message sent to many people. In Karyagrah it is made in **Campaigns**.
Campaign	In **Campaigns**, a broadcast of one template to many people. In **Lead Management**, a bucket for the leads of one source.
Captcha	The small picture of letters you type to prove you are a person.
Catalog	Your list of products. It can be shown to customers as cards in WhatsApp.
Channel	A place where customers write to you: WhatsApp, Instagram, Messenger or your website.
Chat	The conversation between one customer and one channel of a branch.
Coexistence Mode	A way to connect a number so that it keeps working in the WhatsApp Business app as well as in Karyagrah.
Company	Your business as a whole. It holds your branches, people and billing details.
Contact	A customer saved in your address book.
Display name	The business name WhatsApp can show to your customers. Meta reviews it.
Drip campaign	A timed series of messages sent to a person over days.

Word	What it means
Embedded Signup	Meta's guided sign-up that connects a WhatsApp number to Karyagrah through a Facebook login.
Flow	A small form inside WhatsApp that a customer fills in. Not the same as the boxes and arrows of a bot.
Follow-up	A reminder to get back to a chat or a lead on a date.
Free trial	A short period to try a plan without paying. A company has it once.
Inventory	Your stock book: what you have and where.
Knowledge Base	The articles of facts about your business that Sahayak and your bots answer from.
Lead	A person who may buy from you, saved in Lead Management with an owner and a stage.
List	A coloured label you put on a chat, such as "Hot lead".
Meta	The company that owns WhatsApp, Instagram and Messenger. It makes the rules for them.
Meta Business account	Your business's account at Meta. Meta also calls it a business portfolio. Your WhatsApp account lives inside it.
Module	One part of Karyagrah with its own menu item, such as Templates or Orders.
OTP	A one-time code sent to your email or phone to prove it is yours.
Padlock	The lock on a menu item that is not in your plan.
Payment gateway	A service such as Razorpay that takes payments from your customers into your own account.
Plan	What a branch has bought: which modules it can open and how much of each thing it gets.
Quick reply	A saved answer that you send with one click or a `/` shortcut.
Role	A named set of permissions given to a team member.
Round Robin	Giving new chats to people in turn, so each gets about the same number.
Sahayak	Karyagrah's AI agent. It answers customers from your Knowledge Base.
Stale lead	A lead that nobody has touched for some days.
Starter Pack	A ready set of templates, bots and replies for your kind of business.
Tag	A word you add to contacts to group them, such as "customer".
Take over	When a person pauses the bot in a chat to reply by hand.
Template	A message that Meta approves once, so you can send it to customers outside the 24-hour window.
Token (AI)	The unit in which your AI wallet is used. Each Sahayak reply uses tokens.
Webhook	A message that Karyagrah sends to your own server when something happens. For developers.

Word	What it means
WhatsApp Business account (WABA)	The account at Meta that holds your WhatsApp numbers and templates.
WhatsApp Business app	The green business app on a phone. It is not the same as the WhatsApp Business Platform that Karyagrah uses.

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