



# How to Set Up a **WhatsApp Business** Account



## **Step 1: Download and Install WhatsApp Business**

Go to the Google Play Store or Apple App Store on your mobile device and download the WhatsApp Business app

## Step 2: Register and Verify Your Business Phone Number



Launch the App: Open WhatsApp Business after installation



Agree to Terms: Accept the WhatsApp Business Terms of Service



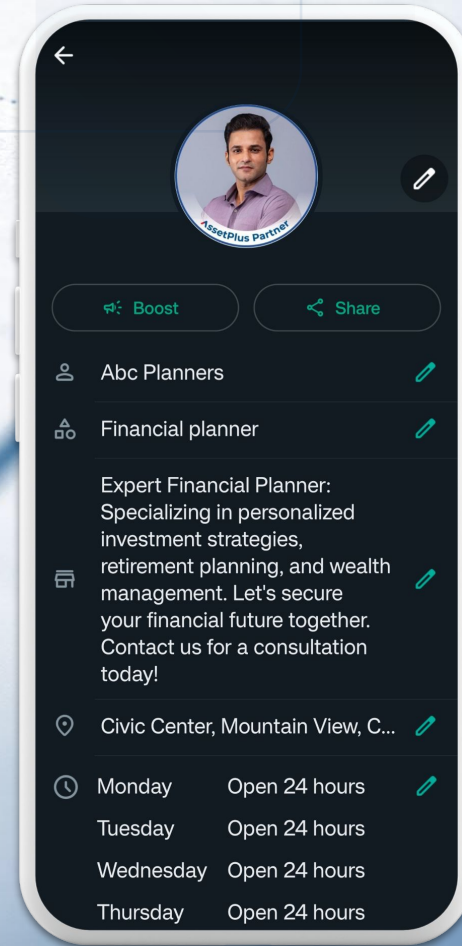
Phone Number: Enter a dedicated business phone number



Verify: Complete the verification process through the SMS or call option

## Step 3: Create Your Business Profile

- Open Settings: Tap the three dots in the top right corner and go to 'Settings'
- Select Business Settings: Choose 'Business settings' then 'Profile'
- Enter Business Information
  - Business Name: Use your official mutual fund distributor name
  - Category: Select a category that best fits your business, like "Finance" or "Investment"
  - Description: Provide a brief description of your services, focusing on mutual funds
  - Address: Include your office or business address
  - Contact Details: Add your email and website, if available
- Profile Picture: Use your business logo or a professional image



## Step 4: Customize Communication Tools



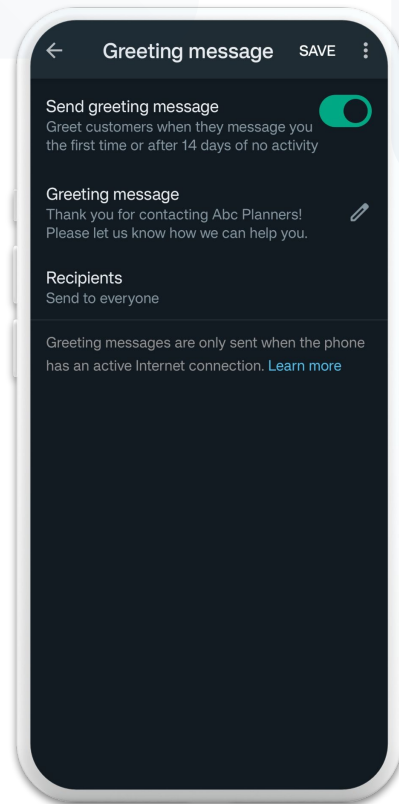
**Set Up Greeting Message:** Create a welcoming message for new or potential clients



**Away Message:** Implement an automated message for when you're unavailable

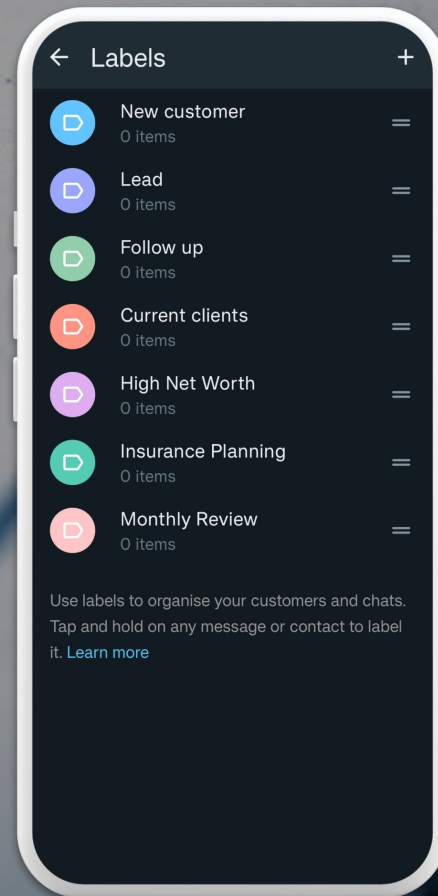


**Quick Replies:** Prepare responses for common inquiries like fund options, investment process, and fees



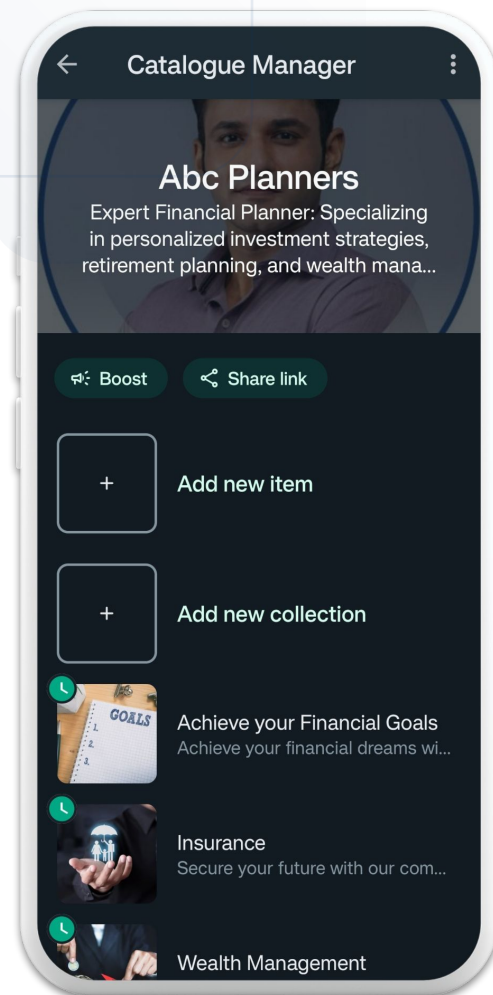
## Step 5: Utilize Labels and Broadcast Lists

- Organize Contacts: Use labels to categorize clients, such as "Prospects," "Active Investors," or "Queries."
- Broadcast Lists: Create lists for sending updates like market news, mutual fund performances, or new fund launches



## Step 6: Implement Catalog and Product Features

- Create a Catalog: If you offer a variety of funds or investment options, showcase them in a catalog
- Product Listings: Detail different mutual funds with descriptions, performance history, etc





## Step 7: Adhere to Compliance and Privacy



**Client Consent:** Ensure you have clients' consent to communicate via WhatsApp



**Privacy Compliance:** Be mindful of privacy laws and regulations in your communications



## Step 8: Promote Your WhatsApp Business

- **Share Your Number:** Publicize your WhatsApp Business number on your website, business cards, and social media
- **Inform Clients:** Notify existing clients about your new WhatsApp Business service