

# WhatsApp



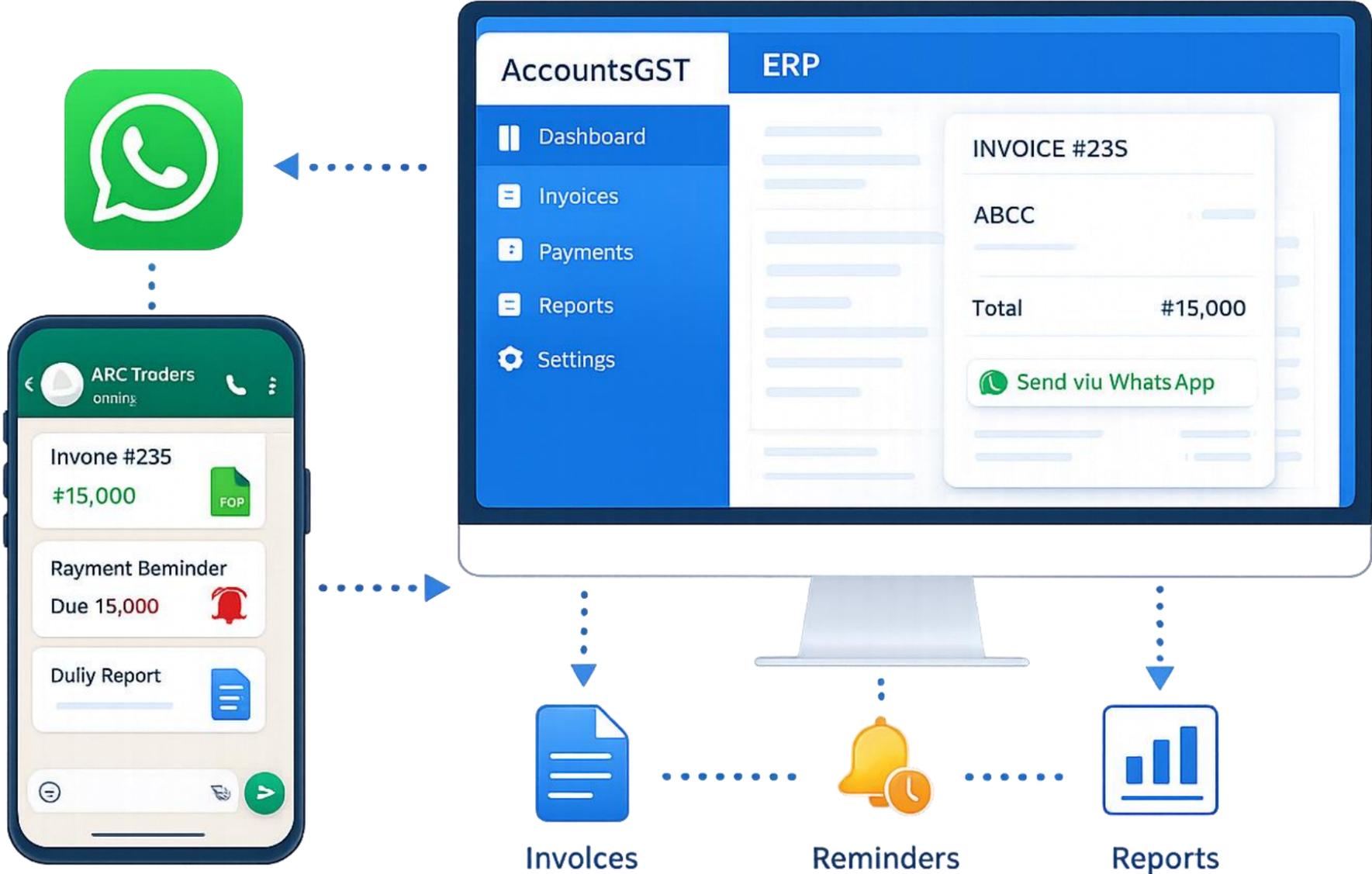
**Communication Go Paperless**



# Overview

WhatsApp Integration with AccountGST ERP enables 100% paperless and automatic communication by sending invoices, payment receipt, overdue reminders, outstanding, ledgers, product promotions and many reports directly to customers.

No manual work or human interaction is required, reduce human cost, making business communication faster, more organized, dispute free and professional.



# Business Benefits

## Key Benefits

- Instant customer communication
- Go 100% Paper Less
- Perfect Business Communication tool
- Reduced manual follow-ups
- Auto-sharing of bills, ledgers, and reminders
- Improved payment recovery
- Faster sales and service workflow
- Professional brand presentation
- Supports images, PDFs & QR codes

## Auto WhatsApp Messages

### Sales & Billing:

- Owner Daily Work Report
- Enquiry
- RMA
- New Customer Registration Form
- New Supplier Registration Form
- Bill Created Notification
- Material Dispatch Alert
- Quotation Sent
- Sales Order Confirmation
- Purchase Order, Delivery Challan, Credit Note
- POS Invoice Sharing
- Send Promotional messages to inactive customers

### Payments & Finance:

- Payment & Receipt Acknowledgment
- Outstanding Reminder
- Early Payment Reminder
- Late Payment Reminder
- PDC Cheque Reminder
- PDC Balance Reminder
- Customer Payment Receipt
- Customer Cheque Deposit Alert
- Customer Cheque Bounce Alert
- Supplier Payment Paid Notification

### Monthly Automated Reports:

- Monthly Customer Ledger
- Monthly Outstanding Reminder

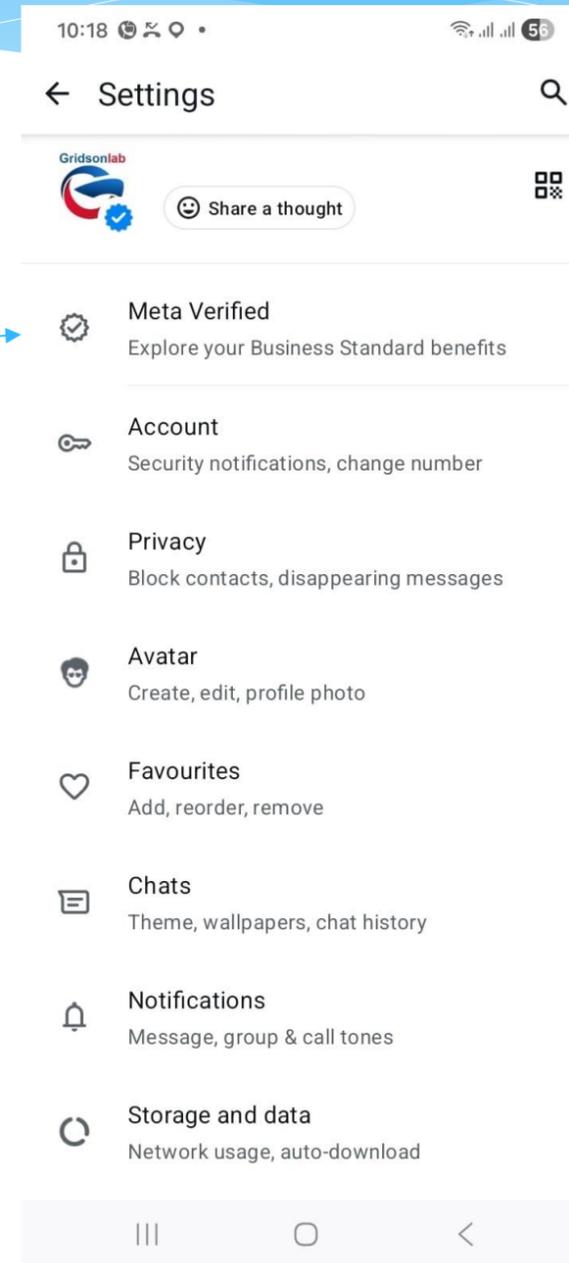
### Send Attachments Automatically

- UPI QR Code
- Quotation Copy
- Invoice Copy
- Sales Order Copy
- Payment Receipt
- LR / Transport Copy
- Ledger Copy
- Outstanding Copy
- Product Images
- Product PDF / Brochure

# Prerequisites & Compatibility

## WhatsApp Integration with AccountGST ERP

1. Use one mobile number to register WhatsApp Business.
2. Install - WhatsApp Business Account
3. Complete all Business details in the WhatsApp Business Mobile App
3. Upgrade - Meta Verified Approval



# Commercial

WhatsApp	Essential Per Year Plan INR	Business Per Year Plan INR	Ultimate Per Year Plan INR	Ultimate Pro Per Year Plan INR	Enterprise Per Year Plan INR	Corporate Per Year Plan INR
With Tag	2000	2000	2000	2000	6000	12000
Without Tag	4000	4000	4000	4000	12000	19000

## Terms & Conditions

- Prices mentioned above are exclusive of all taxes. Applicable taxes will be charged extra.
- Plugin pricing may differ based on the software variant, as higher variants consume more cloud bandwidth and user I/O resources.
- Renewal charges for plugins, wherever applicable, are subject to change in future depending on cloud infrastructure and maintenance cost.
- All disputes shall be subject to Indore jurisdiction only.
- In case the customer is using more than one software link, plugin purchase will be required separately for each link.
- Plugins will remain active for all companies created under the same software link.

# TAG & UNTAG API

## TAG API:

The system will display the text "**ERP Software provided by AccountGST.com**" at the bottom of every message, print, or output generated through the ERP software.

## UNTAG API:

The above text will not be displayed in any message, print, or output generated through the ERP software.

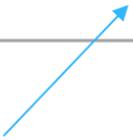
### TAG WhatsApp Message

Dear GRIDSONLAB PRIVATE LIMITED,  
Payment Reminder  
Please be advised that your Invoice No. M2526-70 of date: 01-11-2025 with Amt: 1,01,875 is currently past due. Including this, your total outstanding is (Debit) 1,01,875  
Please remit payment as soon as possible.

You can also download the invoice copy sent with this message  
<https://ahmed.accountgst.com/l.php?l=748397381110021125>

Thanks  
MAHA AND CO.  
Admin, 9755020520ERP

ERP Software provided by : AccountGST.com



### UNTAG WhatsApp Message

Dear GRIDSONLAB PRIVATE LIMITED,  
Payment Reminder  
Please be advised that your Invoice No. M2526-70 of date: 01-11-2025 with Amt: 1,01,875 is currently past due. Including this, your total outstanding is (Debit) 1,01,875  
Please remit payment as soon as possible.

You can also download the invoice copy sent with this message  
<https://ahmed.accountgst.com/l.php?l=748397381110021125>

Thanks  
MAHA AND CO.  
Admin, 9755020520ERP

# Configuration & Integration

To configure WhatsApp, go to the Dashboard and click on the WhatsApp icon. A new window will open for configuration.

The screenshot shows the ERP dashboard for 'DC, New Demo Company (F.Y.:2025-28)'. The top navigation bar includes 'Voucher', 'Programs', 'Banking', 'Report', 'GSTR', 'Business Analysis', 'Masters', 'Tool', 'Switch Year & Company', 'Ledger Finder (press Ctrl+f)', 'Free My Renewal', 'Refer & Earn', 'My Profile', and 'Log-Off'. A WhatsApp icon is located in the top right corner, with an arrow pointing to it from the text above. The main content area is divided into sections: 'Customer' (with buttons for Sale, Receipt, Credit Note, Delivery Challan, Quotation, Sales Order, POS, and Broadcasting), 'Notification' (with a warning: 'WhatsApp is Disconnected. Please reconnect your WhatsApp account to resume message sending.'), 'CRM' (with four cards: Enquiry (0), Complaint (1), Feedback (1), and Customer Lost (7)), and 'Business Health'.

Category	Count	View Report
Enquiry	0	View Report
Complaint	1	View Report
Feedback	1	View Report
Customer Lost	7	View Report

# Configuration & Integration

Click on the **"Connect WhatsApp"** button. A setup window will open to connect your WhatsApp account.

The screenshot shows a web application interface for WhatsApp Setup. At the top, there is a navigation bar with a 'Menu' dropdown, the user's name 'DC, New Demo Company (F.Y.:2025-26)', a 'Support' button with a user icon, and a 'Welcome: Admin' message. On the right side of the page, there is an 'Exit' button. The main content area is titled 'WhatsApp Setup' and contains a 'WhatsApp License Summary' box with the following details: Allotted : 1, Activated : 0, and Inactive : 1. Below this summary is a green 'Connect WhatsApp' button, which is highlighted by a black arrow. Underneath the button, there is a form labeled 'Select WhatsApp Number' with an input field and the text 'for New Demo Company', followed by an 'Update' button. At the bottom of the page, there is a table with the following columns: S/N, Status, WhatsApp Number, Connected Companies, and Action.

S/N	Status	WhatsApp Number	Connected Companies	Action
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# Configuration & Integration

Open WhatsApp on your phone. Go to **Settings / Menu** and tap on **Linked Devices**, then select **Link a Device**. Scan the QR code shown in the setup window as displayed in the picture. After scanning and successfully connecting your WhatsApp account, click on the **"Verify QR Code"** button.



**Add New WhatsApp Number**

**Important Notice Regarding WhatsApp Messaging**  
Please be aware that WhatsApp may block or restrict your number if it detects messaging activity that violates their policies. Common reasons include:

- If recipients mark your messages as Spam or Block your number.
- Sending the same message to a large number of users at once (bulk/broadcasting).
- Sending messages related to promotions, marketing, offers, schemes, or greetings to a large number of users at once.

**Recommendations**

- Avoid using your personal WhatsApp number for automated messaging.
- Use a dedicated number that can be easily replaced if blocked.
- Ensure your Profile Picture visibility is set to "Everyone".
- Prefer using WhatsApp Business application.
- For better reliability, we strongly recommend purchasing the [official WhatsApp Meta Tag](#).

**To connect WhatsApp in ERP**

- Open WhatsApp on your phone.
- On Android tap Menu, On iPhone tap Setting.
- Tap Linked devices, then Link Device.

**Next step**  
[Get New QR Code](#) Then point your phone to this screen and Scan QR Code below



**Final step**  
Scan above QR Code by your phone, then click 'Verify QR Code'.

[Verify QR Code](#)

[Cancel](#)

# Configuration & Integration

After WhatsApp is connected successfully with the ERP software, the status will show **Active**.

The screenshot shows the 'WhatsApp Setup' page in an ERP system. At the top, it displays 'Menu', 'DC, New Demo Company (F.Y.:2025-26)', 'Support', and 'Welcome: Admin'. The main content area includes a 'WhatsApp License Summary' box with the following details:

- Allotted : 1
- Activated : 1
- Inactive : 0

Below the summary is a 'Connect WhatsApp' button. Further down, there is a form to 'Select WhatsApp Number' for 'New Demo Company' with an 'Update' button.

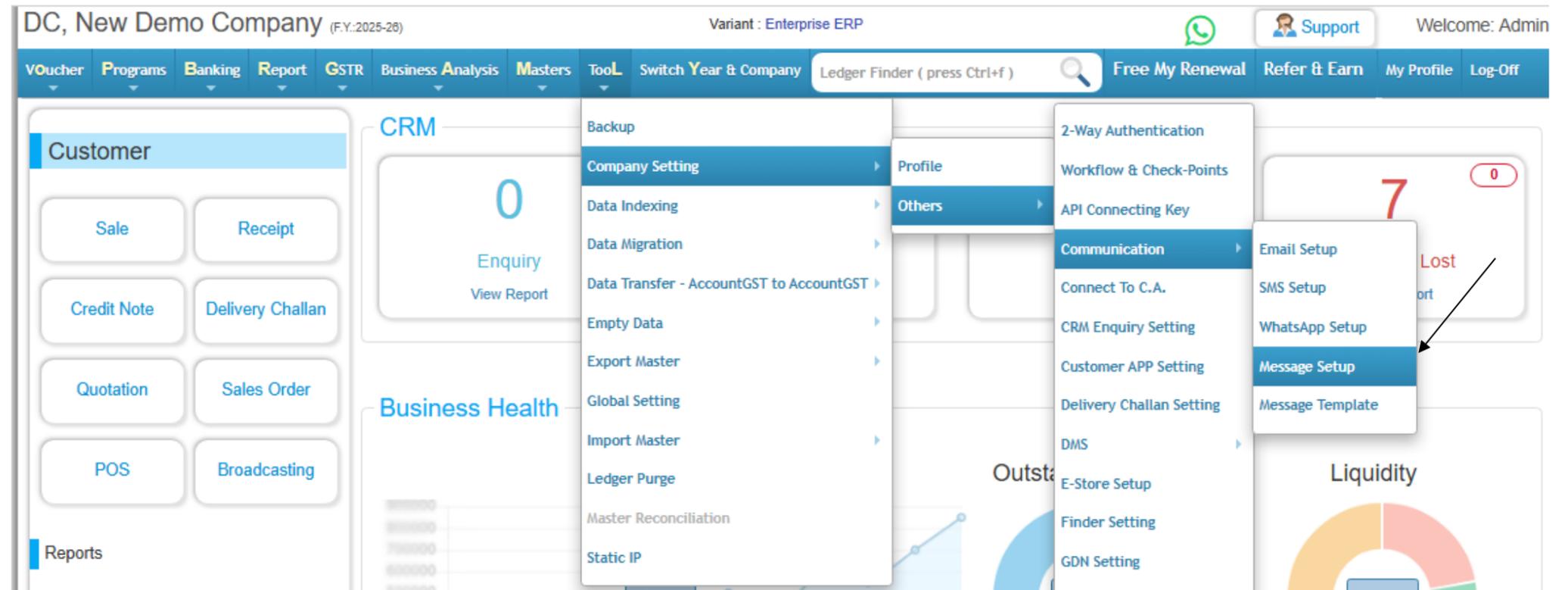
At the bottom, a table lists the connected companies. An arrow points to the 'Active' status in the first row.

S/N	Status	WhatsApp Number	Connected Companies	Action
1)	Active	919893422136 Token Key a97a39f5-7fc4-4ebb- b236-58bcb15b79cc	• New Demo Company, (remove)	Re-Login / Change WhatsApp Number

# Configuration & Integration

You can configure WhatsApp messages by setting the **message body** and selecting which **transactions** you want to send to your customers.

To set the WhatsApp message:  
Go to **Dashboard** → **Tools** → **Company Setting** → **Others** → **Communication** → **Message Setup**.



## Q & A

Question 1: Can I use a single WhatsApp number for multiple companies?

Answer: Yes, you can use a single WhatsApp number for multiple companies.

Question 2: If I have two software links, can I use the same license on both links?

Answer: No. One WhatsApp license supports only one software link.

Question 3: Can my number be blocked by WhatsApp?

Answer: No, as long as you install WhatsApp Business and activate Meta Verified.

Question 4: Can I use this API for bulk messaging?

Answer: No.

Question 5: How can I use the WhatsApp API?

Answer: It can be used for business transactions such as sending sales invoices, purchase details, payment receipts, outstanding reminders, daily alerts, and product promotions.

# THANKS!

## Any questions?

You can find me at:

Email: [support@gridsonlab.com](mailto:support@gridsonlab.com)

Tel: 8349995484, 98983422136

Website: [www.gridsonlab.com](http://www.gridsonlab.com)



GRIDSONLAB PRIVATE LIMITED

26 Jasmine Park, Treasure town road, Indore (M.P.) -  
452012