Message template category guidelines

WhatsApp

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Template category guidelines

Marketing, utility and authentication conversations can only be opened with message templates. To send messages with a template, businesses must first create the template, select its category and submit it for approval.

> Our template category guidelines are how
> we define the category of message templates.

Conversations are categorized as one of these 3 categories, per the category of the template used to open the conversation:

- **Marketing** – Enable businesses to achieve a wide range of goals, from generating awareness to driving sales and retargeting customers. Examples can include new product/service/feature announcements; targeted promotions/offers; and cart abandonment reminders.

- **Utility** – Enable businesses to follow up on user actions or requests, since these messages are typically triggered. Examples can include opt-in confirmation; order/delivery management (e.g., delivery update); account updates or alerts (e.g., payment reminder); or feedback surveys.

- **Authentication** – Enable businesses to authenticate users with one-time passcodes, potentially at multiple steps in the login process (e.g., account verification, account recovery, integrity challenges).

→ Businesses can only send template messages to users who have subscribed to receive messages from them on WhatsApp.

Template category guidelines for **marketing templates**

Marketing templates are our most flexible. They can help businesses achieve a wide range of goals, from generating awareness to driving sales and more.

Message objective	Business goal is to…	Example templates
AWARENESS	Generate awareness of your business, products or services among customers who have subscribed to receive messages from your business on WhatsApp	• Did you know? We installed a new tower in your area so you can enjoy a better network experience. To learn more, visit our site {{1}}. • Diwali is around the corner! Join us at {{1}} on October 24 to celebrate with friends and family. For more details about our event, click {{2}}. • Looking for a getaway this fall? Our newest resort just opened in {{1}}: the perfect place to relax and unwind. Learn more here: {{2}}
SALES	Send general promotional offers to customers related to sales events, coupons or other content intended to drive sales	• As a thank you for your last order, please enjoy 15% off your next order. Use code LOYAL15 at checkout. Visit our site here {{1}}. • Refer → save! Use code FRIEND so you both earn $10 off your next order. • Upgrade to our Premium cabin to enjoy more benefits, like additional legroom and priority boarding. Click {{1}} or log into our app to upgrade. • You have been pre-approved for our credit card! Enjoy an introductory offer of {{1}} if you apply via your personalized link: {{2}}. • Don't forget! Today only, get double points on your purchases. Visit your nearest store and use your phone number at check-out.
RETARGETING	Promote relevant offers or other calls to action to customers who may have visited your website, used your app or engaged with your products and services	• Don't miss out on your favorite shows! Re-subscribe now: {{1}} • You left items in your cart! Don't worry, we saved them for you. Click here to checkout now: {{1}}. • Thank you for visiting our site. You can secure your health insurance in a few easy clicks – continue here: {{1}}. • You didn't finish your application! Please log into your profile here to pick up where you left off: {{1}}. • We miss you! Join us for an afternoon or evening of fun with your family. Click here to book with a special rate: {{1}}.
APP PROMOTION	Request customers to install or take a specific action with your app	• Did you know? You can now checkout in our app. Download it here {{1}} to check out our streamlined experience. • Thank you for using our app. We noticed you have not used our latest feature, {{1}}. Click here {{2}} to learn more about how this benefits you! • In-app only: 20% off this week! Use code SUMMER20 to save on select styles. To download our app, click here: {{1}}. • Hi {{1}}, your friend {{2}} recently joined our community. Send them a welcome message today: {{1}}
BUILD CUSTOMER RELATIONSHIPS	Strengthen customer relationships through personalized messages or by prompting new conversations	• {{1}}, did you think we'd forget? No way! Happy birthday! We wish you the best in the year ahead. • As we approach the end of the year, we reflect on what drives us: You. Thank you for being a valued customer. We look forward to continuing to serve you. • Hello, I am the new virtual assistant. I can help you discover products or provide support. Please reach out if I can help!

Templates with **mixed content** (both utility and marketing, e.g., order update with a promo/offer) are categorized as marketing.

Templates where **contents are unclear** (e.g., contents are only "{{1}}" or "Congratulations!") are categorized as marketing.

Note: Examples are illustrative only; templates containing similar content or content including this example text may be categorized differently based on their exact content.

Template category guidelines for **utility templates**

Utility templates enable businesses to follow up on user actions or requests, since these messages are typically triggered. They must include specificity about the active or ongoing transaction, account, subscription or interaction to which they relate. For example, an order confirmation must contain an order number.

Message objective	Business goal is to…	Example templates
OPT-IN MANAGEMENT ON WHATSAPP	Confirm opt-in to receive messages on WhatsApp as a follow up to opt-in collected via other channels (e.g., website, email) or confirm opt-out	• Thanks for confirming opt-in! You're in. You'll now receive notifications via WhatsApp. • Thank you for confirming your opt-out preference. You will no longer receive messages from us on WhatsApp.
ORDER MANAGEMENT	Confirm, update or cancel an order or transaction with a customer, using specific order or transaction details in the body of your message	• Thank you! Your order {{1}} is confirmed. We will let you know once your package is on its way. • Hooray! Your package from order {{1}} is on its way. Your tracking number is {{2}} and expected delivery date is {{3}}. • Unfortunately, one item from your order {{1}} is backordered. We will follow up with an estimated ship date. If you wish to cancel and receive a refund, please click here: {{2}} • We have received your item from order {{1}}. Your refund for {{2}} has been processed. Thank you for your business.
ACCOUNT ALERTS OR UPDATES	Send important account updates, including time-sensitive alerts, safety information, payment reminders, and other information relevant to already-purchased or subscribed products and services. *These messages should not intend to upsell or cross-sell new products or services.*	• Daily update for account ending in {{1}}: Your balance is {{2}}. • Reminder: Your monthly payment for your subscription to {{1}} will be billed on {{2}} to the card you have saved on file. • To finish setting up your profile, you need to upload a photo. Please click here to upload: {{1}}. • The product you ordered {{1}} on {{2}} has been recalled. Please click here {{3}} to learn more. • There is a tornado alert in your area. We recommend you remain indoors until {{1}} o'clock today.
FEEDBACK SURVEYS	Collect feedback on previous orders, interactions or ongoing relationships with customers. *These messages should not be requesting feedback related to potential upsell or cross-sell opportunities.*	• We have delivered your order {{1}}! Please let us know if there was any issue by reaching out here: {{2}}. • Your feedback ensures we continually improve. Please click here {{1}} to share your thoughts on your recent visit at our {{2}} location. Thank you in advance! • You chatted with us online recently about order {{1}}. How was your experience? Click to fill out a short survey: {{2}}.
CONTINUE A CONVERSATION ON WHATSAPP	Send a message to begin an interaction on WhatsApp that began in another channel. *These messages should not be initiated without a user having requested the conversation to be moved to WhatsApp.*	• Hi! I see you requested support via our online chat. I am the virtual assistant on WhatsApp. How can I help? • Hi {{1}}, we are following up on your call with customer service on {{2}}. Your case has progressed to the next step. Please log into your account to continue: {{3}}.

Note: Examples are illustrative only; templates containing similar content or content including this example text may be categorized differently based on their exact content.

Template category guidelines
for **authentication templates**

enable businesses to authenticate users with one-time passcodes (usually 4-8 digit alphanumeric codes), potentially at multiple steps in the login process (e.g., account verification, account recovery, integrity challenges).

→ **Note**

Businesses can only send template messages to users who have subscribed to receive messages from them on WhatsApp.

Authentication templates are our most restricted. For a template to be classified as authentication, a business **must**:

- Use WhatsApp's preset authentication message templates, which include optional add-ons like security disclaimers and expiry warnings.
- Configure a one-time password button (copy-code or one-tap).
- Follow content restrictions: URLs, media, and emojis are not allowed for authentication template content or parameters. Additional length restrictions of 15 characters also apply to parameters.

Message objective	Business goal is to…	Example templates
AUTHENTICATION	Authenticate users with one-time passcodes	• {{1}} is your verification code. • {{1}} is your verification code. For your security, do not share this code. • {{1}} is your verification code. This code expires in 15 minutes.
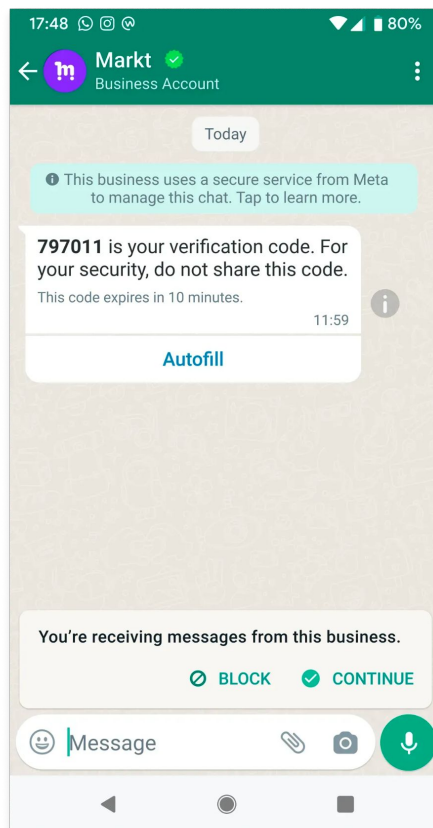
AUTOFILL
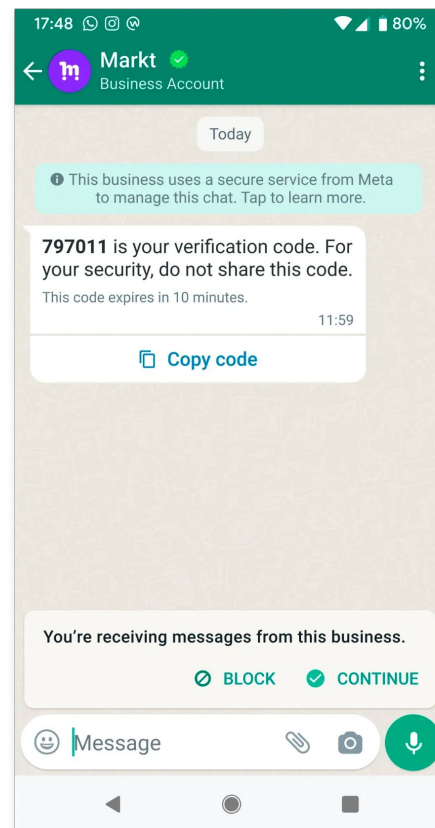
COPY CODE

More detail on our authentication templates and requirements are outlined here.

How template category guidelines are applied in template creation and approval

In WhatsApp Manager

When businesses create a new template in WhatsApp Manager, they select the category they believe applies based on the template contents and our template category guidelines.

We then **determine the category of the template** based on the template contents and our [template category guidelines](#).

If the business' category selection matches the category we determined, the template is **approved**.

If the business' category selection does not match the category we determined, we prompt the business to update their category selection. If the business updates their category selection, the template is **approved**.
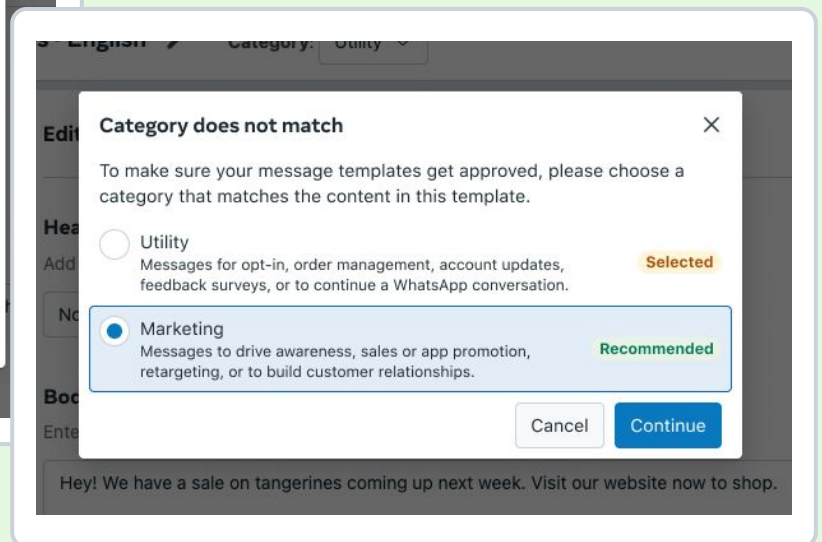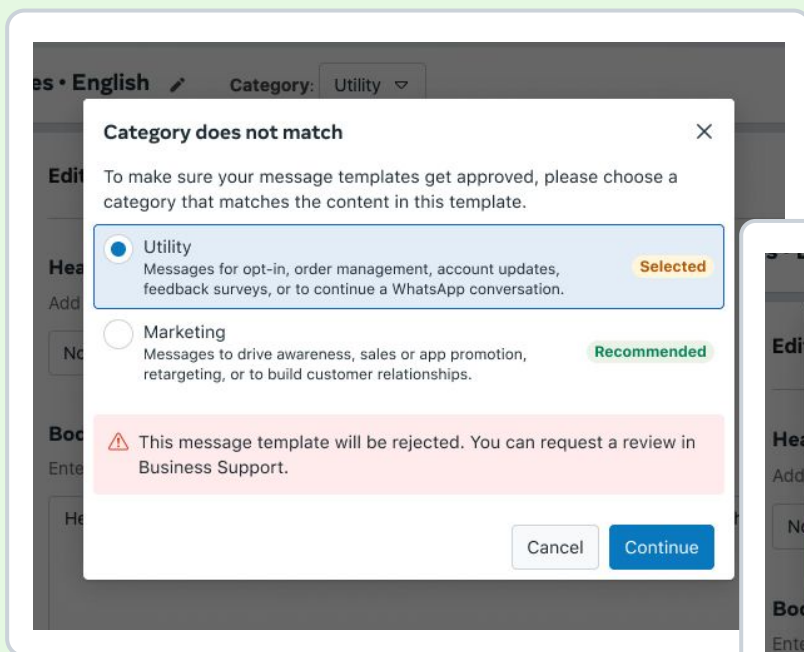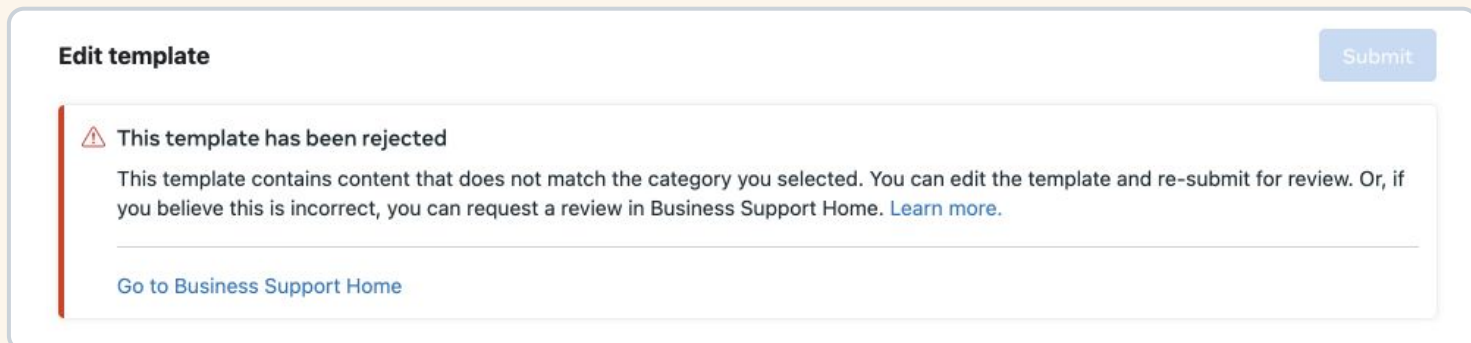
If the business category selection does not match our category, and the business maintains their category selection, the template is **rejected**.

If the business believes the category we have determined for the template is **not consistent with our template category guidelines**, they may request a review via Business Support.
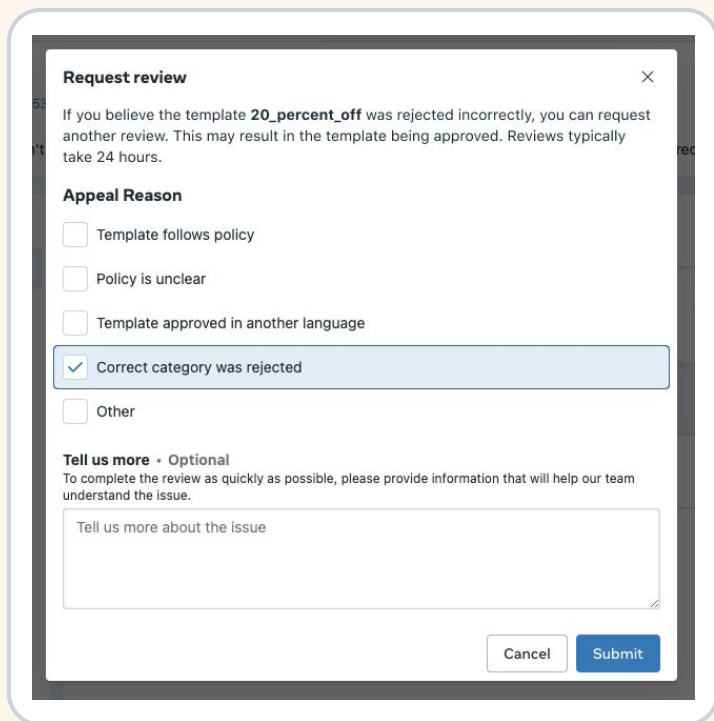
Once there, the business selects the rejected template and clicks '**Request Review.**'

On the 'Request Review' pane, the business should select '**Correct category was rejected**' as the reason.

The template status is then updated to **In Review.**

Businesses are notified within 24 hours of the outcome via an alert in WhatsApp Manager and via email to the business admin for the WhatsApp Business Account (WABA).

If the review is *approved*, the template status is updated to **approved**.

If the review is *not approved*, the template status remains **rejected**.

For reference

→ [Conversation-based pricing](#) on the WhatsApp Business Platform

→ [Template category guidelines](#) on the WhatsApp Business Platform

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