Message template category guidelines

WhatsApp

Template category guidelines

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

Message templates can be categorized as:

- 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; or cart abandonment reminders.

- Utility – Enable businesses to send non-promotional messages that are either specific to and requested by the user or essential or critical to the user. Examples can include order-related updates, payment reminders, or fraud awareness messages.

- Authentication – Enable businesses to verify a user's identity, potentially at various steps of the customer journey.

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

Template category guidelines for **marketing** message templates

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

Message objective	Business goal is to…	Example marketing message 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. • {{Diwali}} is around the corner! Join us at {{location}} on {{date}} to celebrate with friends and family. For more details about our event, click below. • Looking for a getaway this fall? Our newest resort just opened in {{location}}: the perfect place to relax and unwind.
SALES	Send promotional offers to customers related to sales events, coupons or other content intended to drive sales or renewals	• As a thank you for your last order, please enjoy {{15}}% off your next order. Use code {{loyal15}} at checkout. Visit our site here below. • We are actively seeking {{donations}} to meet our fundraising goal of {{amount}}. Support our cause and contribute now! • Upgrade to our {{premium_cabin}} to enjoy new benefits, like {{more_legroom}} and {{priority_boarding}}. Click below or log into our app to upgrade. • You have been {{pre_approved}} for our {{credit_card}}! Enjoy an introductory {{apr_rate}} if you apply via your personalized link below.
RETARGETING / RE-ENGAGEMENT	Promote or recommend offers, products or services or other calls to action to users who may have visited your website, used your app or engaged with you. These are marketing even if requested by users.	• Your subscription will expire on {{date}}! Renew today to save {{discount}}. • You left {{items}} in your cart! Don't worry, we saved them. Checkout now below. • Your loan application is {{pending_approval}}! Please log in to pick up where you left off. • We found a {{car}} that meets your saved search. Log in to our app to view. • We apologize for the delay in your {{package}} delivery. We have deposited a {{credit}} to your account, available immediately.
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 below to use our streamlined experience. • Thank you for using our app. We noticed you have not used our {{latest_feature}}. Click below to learn more about how this benefits you! • In-app only: {{20}}% off this week! Use code {{summer_promo}} to save on select styles. • Hi {{name}}, your friend {{name}} recently joined our community. Send them a welcome message in our app today today: {{URL}}
BUILD CUSTOMER RELATIONSHIPS	Strengthen customer relationships through personalized messages or by prompting new conversations	• {{Name}}, 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: {{Name}}. 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** message templates

→ **Note**

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

[Utility templates](#) *must* be **non-promotional**, not containing any promotional or persuasive intent. They must also be either **specific to or requested by the user** (clearly related to their order, account, services or transactions) OR **essential or critical to the user** (for example, to ensure user safety).

Message objective	Business goal is to...	Example utility 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'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 *These messages should not promote, recommend, upsell or cross-sell products; include offers; or attempt to secure renewals.*	• Thank you! Your order {{order_number}} is confirmed. We will let you know once your package is on its way. • Hooray! Your package from order {{order_number}} is on its way. Your tracking number is {{tracking_ID}} and expected delivery date is {{date}}. • Unfortunately, one item from your order {{number}} is backordered. We will follow up with an estimated ship date. If you wish to cancel and receive a refund, please click below. • We have received your item from order {{order_number}}. Your refund for ${{amount}} has been processed. Thank you for your business.
ACCOUNT ALERTS OR UPDATES	Send important or time-sensitive updates or alerts or other information specific to purchased or subscribed products/services. *These messages should not promote, recommend, upsell or cross-sell products; include offers; or attempt to secure renewals.*	• Daily update for account ending in {{four_digit_number}}: Your available balance is {{amount}}. • Reminder: Your monthly payment for {{service}} will be billed on {{date}} to the {{card}} you have saved on file. • You only have {{number}} minutes remaining in your plan. Remember to top up your account by {{date}} to avoid disruptions. • To finish setting up your {{new_profile}}, you need to upload a {{photo}}. Please click below to upload. • Please note, we have updated our {{customer_service}} phone number to {{number}}. Please save this and call if we can be of support.
FEEDBACK SURVEYS	Collect feedback on previous orders, transactions or engagements with customers. *Specificity of the order or interaction to which these relate is necessary. A general/generic survey or request for feedback will not be approved as utility.*	• We have delivered your order {{order_number}}! Please let us know if there was any issue by reaching out below. • Your feedback ensures we continually {{improve}}. Please click below to share your thoughts on your {{recent visit}} at our {{store}} location. Thank you in advance! • You chatted with us {{online}} recently about order {{order_number}}. How was your experience? Click below to fill out a short survey.
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 {{name}}, we are following up on your call with customer service on {{issue}}. Your case has progressed to the next step. Please log into your account to continue.

Effective June 1, 2024, businesses on Cloud API can use approved utility templates from the [Template Library](#).

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** message templates (cont'd)

For a **utility template** to be deemed **essential or critical to the user**, it *must* reflect one of the use cases below and *must* also be non-promotional (not containing any promotional or persuasive intent).

Utility use case		Example template, meeting the definition of 'essential or critical to the user'
Public safety	**Severe weather**	• There is a {{tornado}} alert in your area. We recommend you remain indoors until {{time}} today.
	Crisis response	• We activated support services for the {{crisis}} in the {{zip code}} area. Live updates on our site, available below.
Public service	**Health emergency**	• The {{city}} has just declared a health emergency due to {{issue}}. We will follow up with more details once available.
	Health awareness	• Stay up-to-date with your health. Stop by {{location}} by {{time}} to get your free COVID-19 {{vaccine}}. Bring your {{vaccination_card}} and identification document.
	Voting registration	• To vote on {{date}}, please ensure your voter {{registration card}} is active. Please click the URL below to understand steps required to renew, if needed. Please disregard this message if your {{registration card}} will be active.
	Disbursements	• Your {{welfare}} disbursement balance is {{amount}}. Kindly note it will expire on {{date}}.
Public disruption	**System outages**	• We have detected a system outage that impacts zip code {{code}}. We expect to restore service by {{time_and_date}}. We apologize for the inconvenience.
	Operation disruption	• This is to notify you that {{trains}} at our {{location}} station are halted due to {{issue}}. Please avoid the area as we work to rectify.
Account or product protection	**Fraud awareness**	• We have detected an increase in {{ATM fraud}}. To protect your card ending in {{1234}}, please consider updating your PIN. Click below to see the step-by-step.
	Product recalls	• The {{product}} you ordered on {{date}} has been recalled. Please click below to let us know how you would like to proceed.
	Warranty alerts	• Thank you for your purchase of {{product}}. Your warranty is active as of {{date}}. Our {{product manuals}} are below, for your reference.
Legal / regulatory compliance	**Identity compliance**	• This is to notify you that you need to upgrade to a {{updated_identification_card}} by {{date}}. To avoid any inconveniences when travelling, please ensure you make an appointment at your local {{office}}.
	Privacy disclosures	• We updated our privacy policy on {{date}}. Please click the button below to learn more.

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** message templates

Authentication templates enable businesses to verify user's identity (usually with alphanumeric codes), potentially at various steps of the customer journey:

- New account creation
- Account integrity, access or recovery
- New or existing orders/transactions

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.

Effective October 1, 2024, businesses on Cloud API can use authentication templates from the Template Library.

Message objective	Business goal is to…	Example templates
IDENTITY VERIFICATION	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.
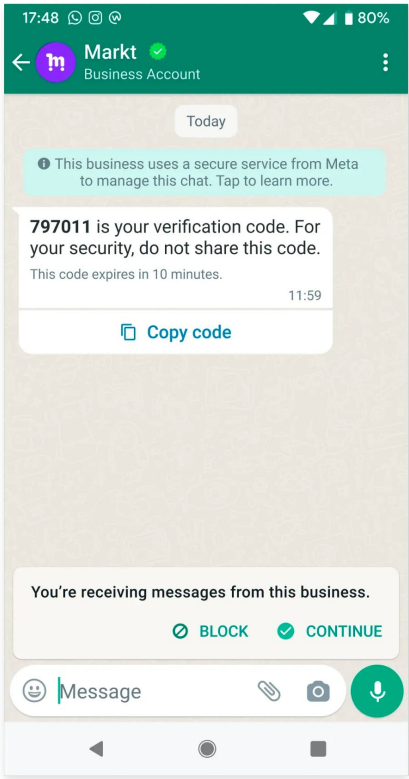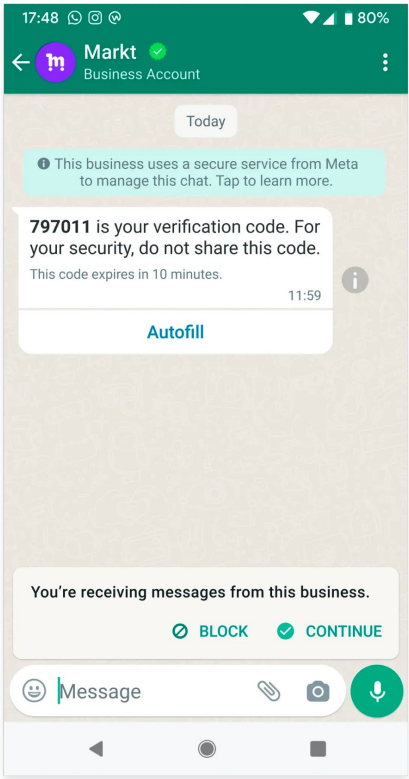
Only authentication templates can be used to send a one-time passcode for identity verification.

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

For Reference

→ [Pricing](#) on the WhatsApp Business Platform

→ [Rates and volume tiers](#) on the WhatsApp Business Platform

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

from

Meta