



AlMaghrib WhatsApp AI Pilot

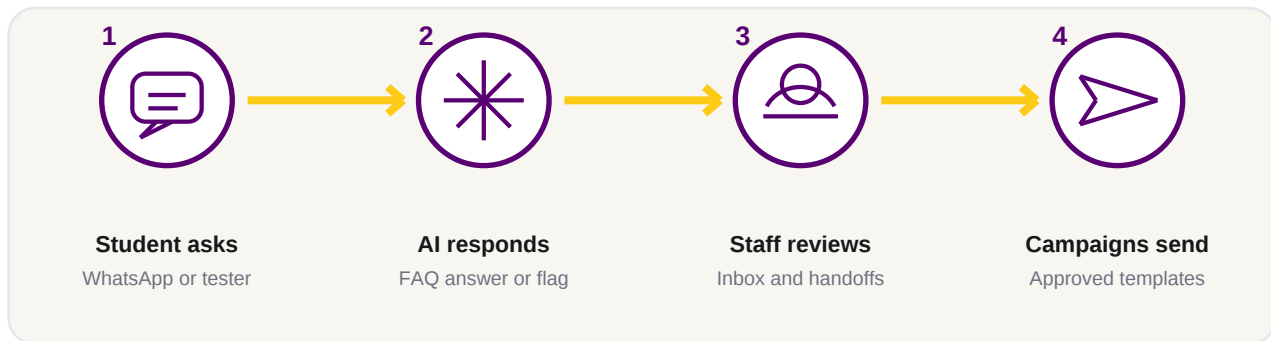
Client Admin Guide

A practical handover guide for staff using the WhatsApp AI backend, contact manager, inbox, handoffs, FAQs, campaign tools, and pilot preview.

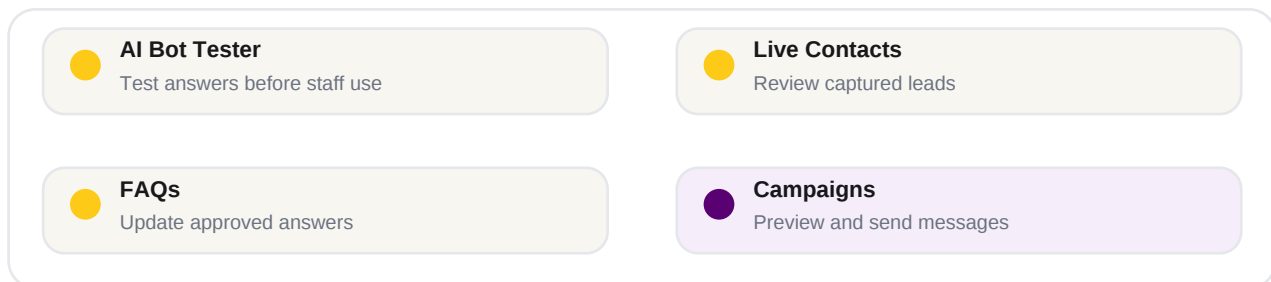
Use this guide for daily operation, campaign checks, and troubleshooting before client handover.

Staff dashboard	https://whatsapp-charity.vercel.app/admin.html
Admin passcode	Provided separately by the pilot owner

Pilot Workflow At A Glance



Where Staff Will Work



This guide is for AIMaghrib staff using the WhatsApp AI pilot admin dashboard. It explains what each part of the pilot does, how to manage contacts and conversations, and how to send a campaign safely.

Access

- Staff dashboard: <https://whatsapp-charity.vercel.app/admin.html>
- Admin passcode: provided separately by the pilot owner.

Do not share the admin passcode, Meta access tokens, Supabase keys, Vercel environment variables, or screenshots that show private keys.

Daily Quick Start

- 1 Open the staff dashboard.
 - 2 Enter the admin passcode.
 - 3 Check Inbox for new conversations.
 - 4 Check Handoffs for conversations that need staff attention.
 - 5 Review Live Contacts & Conversations on the overview.
 - 6 Use Contacts to add, import, export, or update contact consent.
 - 7 Use Campaigns only for contacts with clear WhatsApp opt-in.
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Dashboard Tabs

Overview

The overview is the daily working area.

- WhatsApp AI Bot Tester lets staff test student questions as the fixed Demo Student.
- Reset chat clears the current tester conversation.
- Previous chats keeps saved tester conversations after a reset.
- Live Contacts & Conversations shows the latest captured contacts, interests, consent, and handoff status.

When Reset chat is used, the current Demo Student conversation is saved under Previous chats before the visible chat is cleared.

Preview of Page

Preview of Page shows the mock AIMaghrib page experience and how a student may enter the WhatsApp chat from the page. Use this to demonstrate the pilot entry point to staff or stakeholders.

Growth Overview

Growth Overview shows contact growth, opt-ins, opt-outs, handoffs, and campaign activity over time.

Use the date filters to review a specific period. Hijri calendar selections automatically apply the full selected range, such as the full Ramadan date window.

Inbox

Inbox is where staff review full conversations and reply when needed.

Staff can:

- Search by student name, number, or message.
- Filter all conversations, handoffs, opted-in contacts, and opted-out contacts.
- Select a conversation to review the full message history.
- Send a staff reply when appropriate.

WhatsApp has a 24-hour customer service window. If that window is closed, follow-up may need an approved Meta template or a staff response outside the pilot.

Handoffs

Handoffs shows conversations the bot should not handle alone.

Common handoff reasons include:

- Refunds or money-back requests.
- Account or student portal access.
- Scholarship or financial aid requests.
- Complex registration issues.
- Sensitive personal situations.
- Religious rulings or questions that need human review.

To handle a handoff:

- 1 Open Handoffs.
- 2 Review the recent conversation.
- 3 Send a staff reply if appropriate.
- 4 Leave Resolve after reply checked if the issue is handled.
- 5 Use Resolve only if the issue was handled outside the pilot.

Campaigns

Campaigns is where staff create, preview, and send outbound WhatsApp messages.

Before sending:

- 1 Confirm the message is approved.
- 2 Confirm the audience has WhatsApp opt-in.
- 3 Choose the correct interest categories and location filter.
- 4 Click Preview audience.
- 5 Select or deselect eligible contacts.

- 6 Review the WhatsApp-style message preview.
- 7 Send a small test first when possible.

If sending through the real WhatsApp API:

- 1 Check Send through WhatsApp API using an approved Meta template.
- 2 Enter the approved Meta template name.
- 3 Enter the language code, such as en.
- 4 Enter the course link variable.
- 5 Add media only if the approved Meta template supports that media header.

Media rules:

- Image campaigns need an approved image-header template.
- Video campaigns need an approved video-header template.
- Document campaigns need an approved document-header template and a filename.
- Media URLs must be public HTTPS links.

After sending, review the sent campaign diagnostics. Useful fields include recipient number, Meta message ID, Meta accepted status, delivery status, failure reason, and status history.

FAQs

FAQs controls what the AI bot is allowed to answer.

Each FAQ includes:

- Label: internal staff name.
- Answer: approved response text.
- Keywords: phrases that help match student questions.
- Tags: internal categories added to contacts.
- URL: optional link.
- Send to human handoff: use this when staff should review the conversation.

Keep FAQ answers short, direct, and approved. Avoid guessing about pricing, eligibility, refunds, scholarships, or policies.

For refund or money-back questions, the bot should explain that requests are handled by AIMaghrib staff directly because they depend on the specific class, circumstance, and reason.

Contacts

Contacts is where staff manage who can receive campaign messages.

To add one contact:

- 1 Go to Contacts.
- 2 Enter the contact name.
- 3 Choose the country code.
- 4 Enter the WhatsApp number.

- 5 Add the location if available.
- 6 Select interest categories.
- 7 Check This contact gave WhatsApp opt-in only when consent is clear.
- 8 Click Save contact.

Canada and US numbers display in a readable format, such as (800) 342-9394.

To import contacts:

- 1 Go to Contacts.
- 2 Choose a CSV file or paste CSV rows.
- 3 Select import categories.
- 4 Add a default import location if needed.
- 5 Check These contacts gave WhatsApp opt-in only if every imported contact has consent.
- 6 Click Import contacts.

Supported CSV columns:

phone, name, location, tags

Example:

```
+16475551234,Aisha Khan,Toronto,course_interest  
+14165550123,Omar Ali,Mississauga,all_access_interest
```

Use Download CSV to export contacts for review or backup. Use Show all to expand hidden contacts.

Recommended Daily Routine

At the start of the day:

- 1 Check Inbox.
- 2 Check Handoffs.
- 3 Reply to urgent staff-needed conversations.
- 4 Review new opt-ins and opt-outs.
- 5 Test one question in WhatsApp AI Bot Tester if FAQ changes were made.

Before sending a campaign:

- 1 Confirm the message and template are approved.
- 2 Confirm the audience has consent.
- 3 Preview the audience.
- 4 Deselect anyone who should not receive the message.
- 5 Review the WhatsApp-style preview.
- 6 Send the campaign.
- 7 Review delivery diagnostics after sending.

Troubleshooting

Login does not work

- Confirm the admin passcode is correct.
- Ask the pilot owner to update ADMIN_PASSCODE in Vercel if needed.

Data is not saving

- Refresh the page and test again.
- Confirm the latest Vercel deployment is ready.
- Ask the pilot owner to confirm Supabase variables are configured.

A contact is missing from a campaign

- Confirm the contact opted in.
- Confirm the contact did not opt out.
- Confirm the selected interest category matches the contact.
- Confirm the location filter is not excluding the contact.

A WhatsApp campaign fails

- Open the sent campaign diagnostics.
- Check the failure reason.
- Confirm Meta payment setup is complete.
- Confirm the WhatsApp business number is active.
- Confirm the template is approved.
- Confirm the language code matches the approved template.

Media does not send

- Confirm the media URL is public HTTPS.
- Confirm the Meta template has the matching media header type.
- Confirm document sends include a filename.

Staff replies do not send

- Check whether the WhatsApp 24-hour reply window is closed.
 - Use the approved template follow-up path if configured.
 - If urgent, follow up outside the pilot.
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Handover Notes

This pilot is intended for controlled staff use. Before using it with larger audiences, confirm:

- Admin access works.
- Supabase storage is connected.
- WhatsApp/Meta credentials are current.
- Campaign templates are approved in Meta.
- Payment setup is complete in Meta.
- Staff understand opt-in and opt-out rules.
- FAQ answers have been reviewed by the client team.