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WhatsApp Business App

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Organising customers with labels in the WhatsApp Business app

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Labels are the only organising system the WhatsApp Business app has, and they are enough for one or two people answering. Each chat can carry one or more labels (*New customer*, *Pending payment*, *Delivered*), and you then filter the list by label. If today your order list is “scroll up and down until you find it”, this is ten minutes that change your day.

How to use them, step by step

1. **Open a chat** and, from the menu or by pressing on a message (it depends on the version), choose *Label*.
2. **Pick one of the labels that come with the app** (the defaults are sales ones: new customer, new order, pending payment, paid, order complete) or create your own, with a name and a colour.
3. **To see just one label**, open the labels tab and tap the one you want: you get the list of chats that carry it.
4. **Change the label as the order moves along**: from “Pending payment” to “Paid”, then “Delivered”. That habit is what gives the system its value.

A small set that works

Label	It means	Who changes it
New	Wrote for the first time and has not had a full reply yet.	Whoever answers, when they reply.
Waiting for reply	Said they would decide or send information.	Whoever answers.

Label	It means	Who changes it
Pending payment	Has an order, still to pay.	Whoever confirms payments.
Paid, preparing	Paid, still to ship or deliver.	Whoever prepares.
Done	Delivered and went well.	Whoever delivers.

Fewer than eight labels is ideal. Each extra one is one more decision at the moment of applying it, and the ones nobody uses only get in the way.

Labels are yours, not the customer's.
The customer never sees them. Write them for yourself and the team, but with no remarks about the person ("difficult", "does not pay"): if that conversation is ever requested by the person in it, or shown by mistake, what you wrote is in plain view. Data in chats is personal data: **consent for WhatsApp messages**.

Labels do not become a sending list without care.
The app lets you message everyone with a label, but it suffers the same rule as broadcast lists: only people who have your number saved in their contacts receive it. See **broadcast lists, groups and channels** before counting on it.

With several people, labels stop being enough.
The app was designed for one phone and a few linked devices. When "whose chat is this?" and "who answered?" start to be missing, it is time to look at a shared inbox: **Chatwoot on a VPS** or the **Cloud API**.

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