



Your learning route

Start in the separate practice area. Then apply the checked system to your business. This edition teaches manual organisation on your iPhone.

Eight original explanatory diagrams, not app screenshots. Official iPhone help checked on 4 October 2026. No practical test was performed on a reference account.

Goal and preparation	3
Understand lists and labels	5
A safe practice area	8
A small stage model	10
Names colours and rules	13
Prepare the test lists	15
Assign a chat	19
Find chats and content	21
Change name colour and members	23
Remove an assignment	25
Delete a test list carefully	27
A complete customer case	29
Multiple enquiries and special cases	32
Useful customer segments	34
Work with limited data	36
Your maintenance routine	38
Troubleshooting	41
Completion test and answers	44
Worksheets and quick reference	47
Sources and scope	53



P2-02 / ORGANISE CUSTOMERS

Start safely and protect existing work

Before making changes

Open your existing categories and read them carefully. If several people use them, first agree which names they already rely on and who can approve changes. Do not rename an existing category just because our example uses a different name.

Record the categories and their meaning on your private worksheet. Do not copy customer names, phone numbers or conversation contents for this exercise. Categories such as Waiting for a reply and Appointment agreed are enough for the overview.



An important boundary around automatic events

Tools or Lists may offer automatically created lists. The feature may be called Auto-create lists or Auto-created lists. Do not enable it for this guide. Our exercise deliberately uses assignments you maintain yourself.

WhatsApp describes automatic events as an optional way to label orders and leads automatically. Enabling it has wider consequences: chats are managed through Meta's secure service and existing linked devices are disconnected. The iOS help also lists possible effects on greeting and away messages, and on editing and deleting messages. Most devices can be linked again after setup; WhatsApp for Windows and WearOS are exceptions in that help text. Review this feature separately before considering it for your business. [\[Q6\]](#)

If automatic events are already enabled

Do not switch them off blindly as part of tidying up. First check with the person responsible for your account which workflows depend on them. This guide does not reverse an existing automation setup. You can work through the plan on paper until the account configuration is clear.

Separate your practice area

Use three unmistakable practice lists: TEST Organise, TEST 01 Review and TEST 02 Waiting. You need only one suitable test chat. [P2-05](#) explicitly prepares both practice stages; real customer categories remain untouched. Do not create real contacts using the fictional names in this book.



If you do not have a practice chat, start with the case cards on paper. Record the device exercise as outstanding rather than marking it as passed.

Stop signs

Stop if an action asks you to send something, pay, link another device, share data or change how chats are managed. None of those extra actions belongs to the manual organisation described here. Read what object a deletion confirmation applies to before confirming it.



P2-05 / ORGANISE CUSTOMERS

Create your first list

Your goal for this lesson

Create a clearly named test list containing the intended practice chat. Then find that exact list again.

Prepare

Read [P2-02](#). Choose the name TEST Organise. Check that you can identify the intended participant from the existing chat. Do not add real customers or a group just to practise.

The currently documented iPhone route

1. Open Tools in WhatsApp Business.
2. Open Lists and choose New list.
3. Enter TEST Organise. If you want a colour, choose one you can recognise easily.
4. Select the intended test participant. Check the selection before continuing.
5. Finish creating the list with Done. [\[Q1\]](#)



Create the test list step by step

1 Tools

Open the business tools.

2 Lists

Open the organisation area.

3 New list

Enter the name TEST Organise.

4 Test participant

Select only the intended practice chat.

5 Done

Finish and check the members.

Original explanatory diagram based on [Q1]; not an app screenshot. Text route based on the official iPhone help. No app interface is being depicted.

What to check

Open the list overview again. Can you see TEST Organise? Open it. Is the correct test chat included, with no unrelated person? Do the name and purpose match? Only then is this task complete.



If the intended selection is missing

Do not add an arbitrary customer instead. Go back and check that you are in the correct account and the intended test chat exists. If the app requires a participant selection, you need a suitable practice chat. A paper exercise remains possible but does not replace the practical check.

If many lists already exist

The official help documents up to 20 Business lists. This is a limit, not a target. Do not delete a category in use just to make space for practice. First check with the responsible person whether an unused test category can be removed.

[Q1]

Prepare two practice stages

The next lessons need a clear starting point, so now prepare TEST 01 Review and TEST 02 Waiting. These are additional test lists, not real customer categories. Assigning the chat to both initially is a short setup state that you will then clear.

1. Create TEST 01 Review using the same route as TEST Organise. Select only your intended test chat and confirm with Done.
2. Create TEST 02 Waiting in the same way, using the same test chat.
3. Open TEST 01 Review, choose Edit and remove the test participant from its members. Finish editing. Repeat this for TEST 02 Waiting. Remove only the membership, not the chat. [Q1]



4. Open both practice stages again. The expected test state is that both lists still exist and no longer contain the test chat. It is still present in TEST Organise. If your app will not let you remove the final person, or a test list disappears afterwards, mark this preparation as outstanding. Do not continue using an assumed state; check what is visible and consult the current help.

Why this small extra step

The official creation instructions include selecting people. We therefore do not assume an unverified way to create a list empty from the start. This preparation lets you practise a genuinely new assignment in [P2-06](#). If your interface does not clearly support removing the membership, stop here and check the help.

Real customer categories come later

Complete the entire practice workflow first. Create the working stages for real enquiries only after [P2-17](#). Choose appropriate cases when doing so; immediately assigning all contacts would make the views unreliable.

Your record

Note the date, test-list name and result of checking its members. Correct test participant, no additional people is sufficient. You do not need a screenshot containing customer information.