CLICK-TO-MESSAGE AD WELCOME: TURN THE CHAT INTO A SALE

Greet people who tap your ad within seconds, ask what they came for, show the product that fits and see in Analytics what the ad sold.

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A click-to-message ad does something no website ad can: the person who taps it opens a chat with you and writes first. That is a warm lead with an open conversation, and most of them get a generic "Hi! How can we help?" or a reply an hour later, by which time they have scrolled on. A welcome flow for ad clicks answers within seconds, tags the person with where they came from, asks one question to understand what they want, shows the product that fits and answers the follow-up questions, all inside the 24-hour window the ad opened. This guide sets it up step by step and shows how to see what the ad sold.

Key points

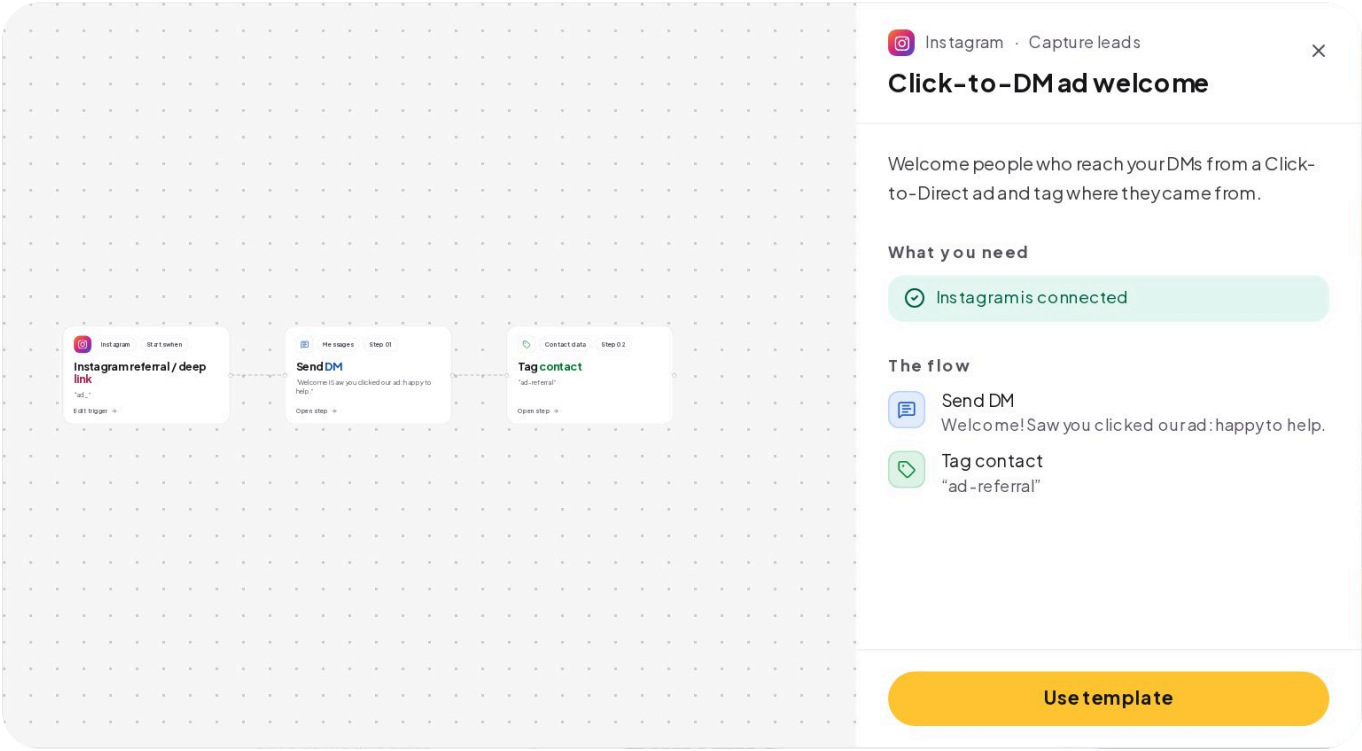
- The Click-to-DM ad welcome template starts when someone reaches your Instagram DMs from a Click-to-Direct ad, welcomes them and tags them as ad-referral.
- One quick question with buttons narrows down what they came for, and the product that fits comes next as a card with a button.
- The chat stays open for 24 hours after their last message, and each reply they send opens it again.
- Follow-up questions can be answered by the AI agent from your sources, on a paid plan and your own AI key.
- Sales the chat leads to are credited to the last message the buyer got, and with the Meta Conversions API connected, they go back to your own Meta dataset.

HOW THE FLOW WORKS

Step	What happens	Built with
1. The tap	The person taps Send message on your ad	Your Meta ad
2. The welcome	A greeting within seconds, and a tag for the source	The Click-to-DM ad welcome template
3. The question	What they are looking for, as buttons	Ask a question
4. The product	A card with a photo, a price line and a button	Send card carousel
5. The follow-up	Size, delivery, price questions	Keyword replies, the AI agent
6. The sale	A Buy button or the product page	Buy button, store orders

STEP 1: START FROM THE TEMPLATE

Open **Automations** and search the gallery for "ad". **Click-to-DM ad welcome** welcomes people who reach your DMs from a Click-to-Direct ad and tags where they came from.



Click-to-DM ad welcome: a greeting and a tag for where they came from.

Its trigger listens for people who arrive from an ad, and its two steps send a welcome and tag the contact as ad-referral. Press **Use template**, then build the rest of the conversation after the welcome.

Step 2: Match the welcome to the ad

The person tapped an ad about something specific, and the first message should show you know it. If you run several ads at once, write a welcome that fits all of them, and let the first question sort people by what they came for:

> "Hi {first name}! Thanks for tapping our linen collection ad. Shopping for yourself or a gift?"

A welcome that repeats the ad's promise in its first line keeps people in the chat; a generic one makes them wonder why they tapped.

Step 3: Ask one question

One question with two or three buttons turns a vague tap into a specific need:

- **For a store.** "For yourself or a gift?" or "Which size do you usually wear?"
- **For a service.** "Is this for this week or later?"
- **For a course.** "Beginner or already practicing?"

The **Ask a question** step saves the answer on the contact, so the next message, and every later broadcast, can fit. A tap is also a new message from them, so the 24-hour window starts again.

Step 4: Show the product that fits

After the answer, show what fits it, not everything you sell. A **card carousel** holds up to 10 cards, each with an image, a title, a short subtitle such as the price and up to 3 buttons, but two or three cards convert better than ten.

- **View** opens the product page.
- **Buy** opens a Stripe or PayPal checkout through a Buy button, with the money going straight to your account.
- **Ask a question** starts a short flow for sizes, delivery or materials.

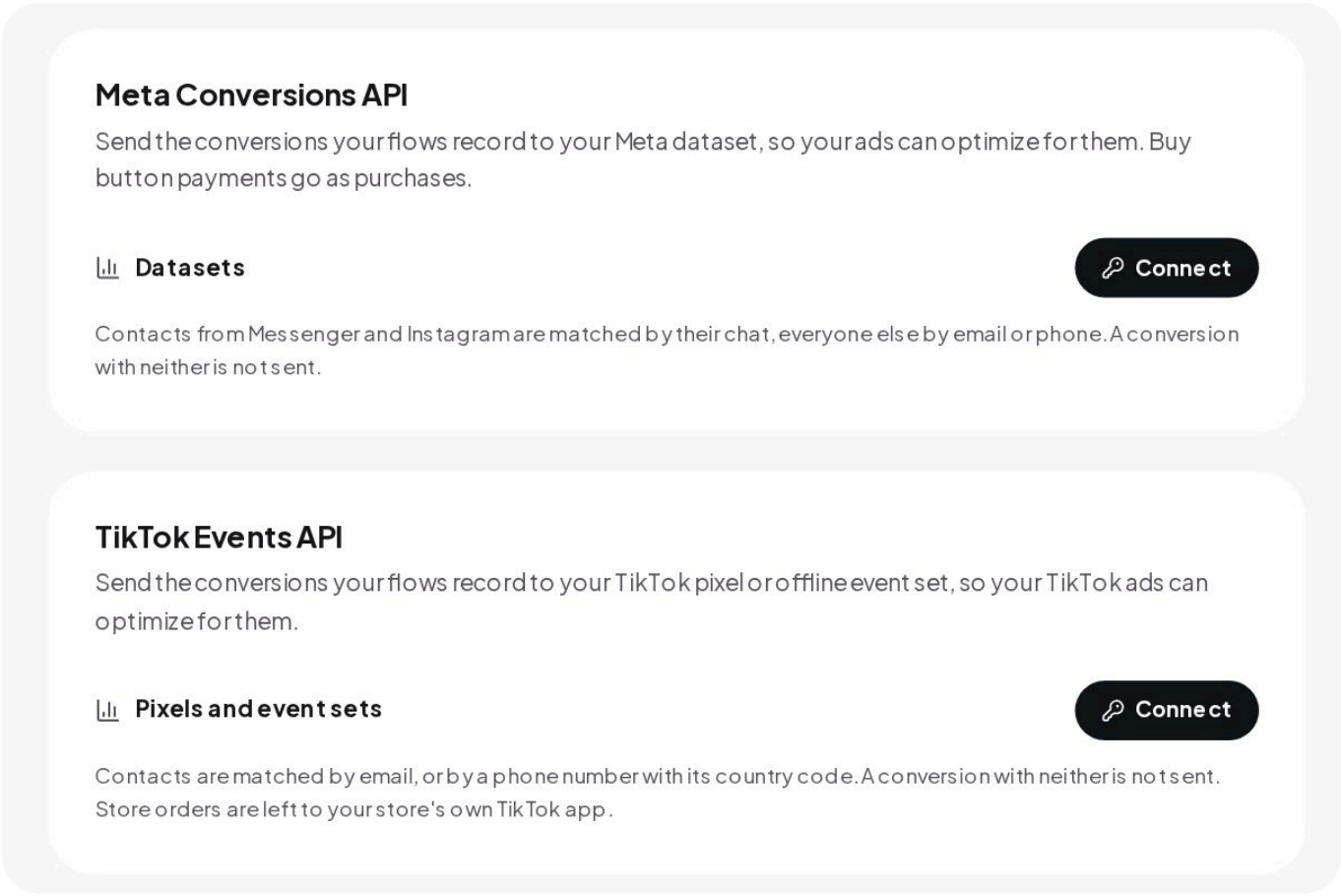
Step 5: Answer the follow-up questions

Ad clicks ask the same handful of questions: does it come in my size, how long is delivery, can I return it. Keyword replies answer the common ones exactly. For the rest, an **AI agent** step on a paid plan answers from your sources, such as your shipping and returns pages, on your own OpenAI, Anthropic, Google Gemini or Azure OpenAI key. When the answer is not in your sources, the agent hands the chat to your team.

Keep the conversation inside the window: answer within minutes, and keep each message ending with something easy to reply to.

STEP 6: SEND SALES BACK TO META

Your ads learn faster when Meta knows which chats ended in a sale. Open **Settings, Integrations** and connect the **Meta Conversions API** with your own Meta dataset and key.

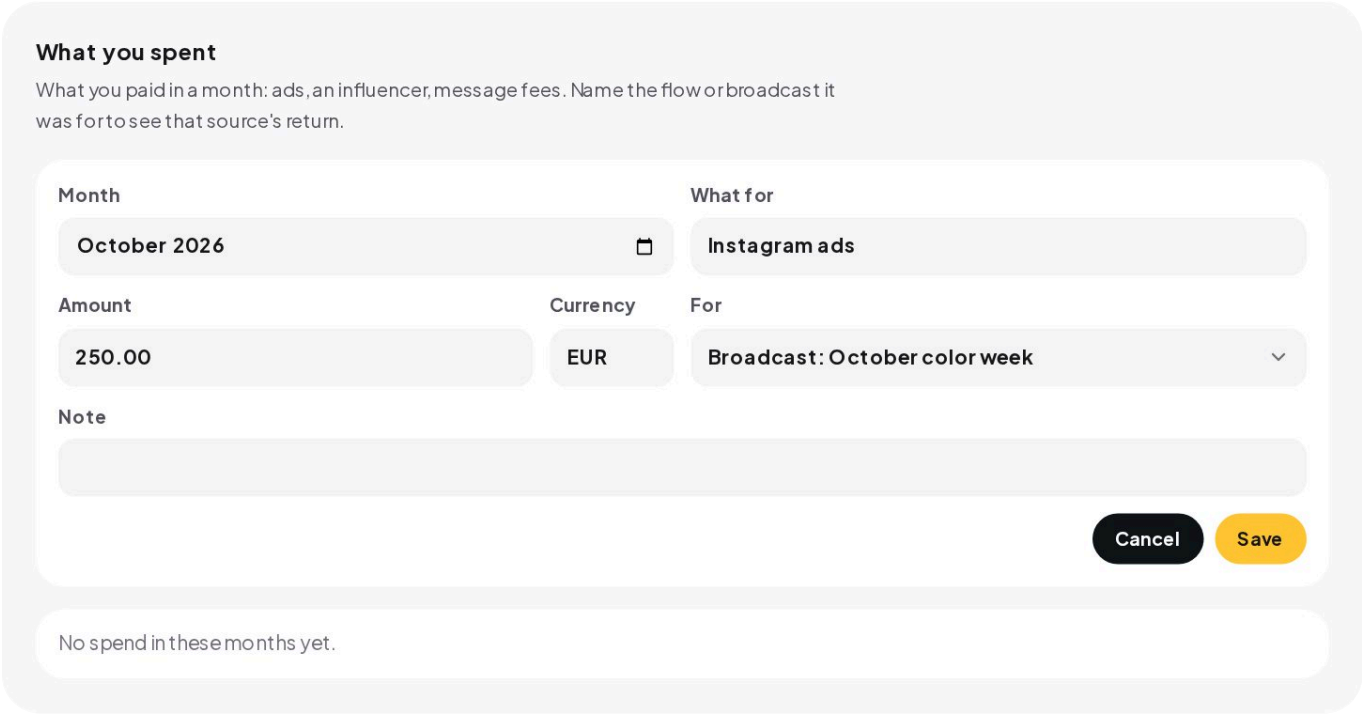


Each conversion your flows record goes to your Meta dataset and your TikTok pixel or event set.

Conversions your flows record go to that dataset, and Buy button payments go as purchases. Contacts from Instagram and Messenger are matched by their chat. Store orders are left to your store's own Meta app, so an order is never counted twice.

STEP 7: SEE WHAT THE AD SOLD

Every message the flow sends is a touch on the contact. When a sale happens, the last touch in the 30 days before it gets the credit, and the **Results** tab of Analytics shows the sales next to the flow that made them. Add what you spent on the ad for the month, and the return appears next to those sales.



Spend for one month, linked to the broadcast it paid for.

Enter spend per month, even rough numbers. A return that is wrong by a little still tells you which of two ads to keep.

PLAN THE CONVERSATION BEFORE THE AD GOES LIVE

Build and test the chat before you spend a cent on the ad. A simple plan on paper saves money:

1. **The promise of the ad**, in one sentence.
2. **The first question**, with two or three answers.
3. **The answer to each choice**, as one message with a card or a link.
4. **The three most likely follow-up questions**, as keyword replies or sources for the AI agent.
5. **The hand-over**, for anything else, with a teammate on the inbox during the first days.

Then press **Try it** on the canvas and play the conversation as someone who tapped the ad. Every dead end you find there is a paid click you will not lose later.

Ad ideas and their first question

Ad	The first question	What follows each answer
A seasonal collection	For you or a gift?	Three pieces, or three gift sets
A free consultation	This week or later?	The free times, or a reminder to book
An online course	Beginner or advanced?	The right module and its price
A restaurant's set menu	Lunch or dinner?	The menu and the booking times
A service with a quote	Which size of project?	Two quick questions, then a person

The best first question is one the person can answer without thinking, and whose answer changes what you show next.

When to hand over to a person

Some taps are worth a person straight away: a large order, a business enquiry, a complaint about a past order. Add a button such as **Talk to the team**, and connect it to **Notify the team** and **Assign the conversation**. When a teammate replies, the automation in that chat stops and the bot stays quiet, so the customer never hears two voices. Watch the **Unanswered conversations** alert during a campaign: an ad that brings questions faster than your team answers them needs a quicker hand-over or a smaller budget.

Reading the results

After the first week, compare three numbers for each ad: the people tagged ad-referral, the ones who answered the first question, and the sales credited in the Results tab. Many taps and few answers point to the welcome; many answers and few sales point to the product cards or the price. Change one thing at a time, and give it a few days before you judge it.

A worked example: a candle shop's autumn ad

A candle shop runs an Instagram ad for its autumn scents with Send message as the button.

1. **The tap** starts the Click-to-DM ad welcome automation: "Hi! Thanks for tapping our autumn scents ad. Is this for you or a gift?" and the ad-referral tag.
2. **The person taps Gift.** The answer is saved, and the next message shows three gift sets as cards with View and Buy buttons.
3. **They ask "how long is delivery to Leeds?"** The AI agent answers from the shipping page in the sources.
4. **They tap Buy.** The Buy button opens a Stripe checkout; the thank-you lands back in the chat.
5. **The sale** is credited to the welcome flow, and with the Conversions API connected, it goes to the shop's Meta dataset as a purchase.

The shop sees in the Results tab what the autumn ad sold through the chat, and Meta learns which taps turned into buyers.

WRITING AN AD THAT STARTS GOOD CHATS

- **Promise one thing.** "Find your autumn scent in 30 seconds" sets up the question in the welcome and tells people what the chat is for.
- **Say what happens after the tap.** "Tap Send message and we'll help you choose."
- **Keep the welcome in the ad's voice.** The chat should feel like the next frame of the ad.
- **Have someone on the inbox at launch.** The first hours bring the questions you did not expect, and each one is a keyword reply to add.

COMMON MISTAKES

- **A generic welcome.** "How can we help?" wastes the reason they tapped.
- **A long first message.** One line and one question, then the product.
- **Everything at once.** Two or three cards, not your whole catalog.
- **No hand-over.** A buyer with a real question should reach a person while they are still in the chat.
- **No spend entered.** Without it, Analytics shows sales but not the return.

TERMS IN THIS GUIDE

- **Click-to-message ad.** A Meta ad whose button opens a chat with you instead of a website.
- **Click-to-Direct ad.** The Instagram version, which opens your Instagram DMs.
- **Referral.** The information that a chat came from an ad, which the template's trigger listens for.
- **Card carousel.** A row of up to 10 cards, each with up to 3 buttons.
- **Conversions API.** Meta's way to receive sales from a server, sent to your own Meta dataset.
- **Touch.** A message a contact received, recorded so a later sale can be credited to it.

QUICK ANSWERS

Can different ads get different paths?

Yes, through the first question. One welcome asks what the person came for, and each answer sends them down its own path, with its own tag.

What if they write after the window closes?

Their new message opens the window again, and the flow can answer as usual.

Does it work with Messenger ads too?

The template is for Instagram ads. For a Page, an m.me link with a ref and the m.me link welcome template greet people who arrive from a Messenger link.

Can I see which ad a contact came from?

The template tags everyone who arrives from an ad as ad-referral, and the answer to the first question shows what each person came for. Tag each answer, such as gift or self, to filter Audience by it.

Is it allowed to message people who tapped an ad?

Yes. They opened the chat themselves by tapping Send message, so the normal 24-hour window applies from their first message.

SOURCES

- **Messenger Platform and IG Messaging API policy**, Meta for Developers, on the 24-hour window.
- **Conversions API**, Meta for Developers, on sending conversions from a server.

DO IT IN SECONDS, FREE

chatinflow.com/flows/click-to-dm-ad-welcome