

THE BROKER TIMES

SETUP

Data stores

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The scenario uses two Make Data Stores. **Create them first**, with these exact field names, or the imported blueprint will have unmapped fields.

In Make: left sidebar → **Data stores** → **Add data store**. Each one needs a Data structure, which you create in the same dialog (**Add** next to Data structure).

Field names are case-sensitive and must match exactly.

Data store 1: `wa_contacts`

One record per person who has ever messaged you. The record key is their WhatsApp number, so it upserts — one record per contact, always current.

FIELD NAME	TYPE	REQUIRED
<code>wa_id</code>	Text	yes
<code>profile_name</code>	Text	no
<code>first_name</code>	Text	no
<code>opted_out</code>	Boolean	no
<code>stage</code>	Text	no
<code>last_seen</code>	Date	no
<code>notes</code>	Text	no

Suggested size: 1 MB is generous for thousands of contacts.

What each field does

- `wa_id` — their number in international format without the plus, e.g. `61412345678`. Also used as the record key.
- `profile_name` — the name on their WhatsApp profile. Free, but often a business name, a handle or blank, which is why it is not what the agent greets people with.
- `first_name` — the name they actually told you when the agent asked. This is the one used in conversation.
- `opted_out` — the kill switch. When true, the agent will not reply to them again.
- `stage` — where the contact is up to. `AWAITING_NAME` and `AWAITING_TYPE` are the two onboarding steps the scenario handles itself; after that the model sets it to HOT / WARM / LATER / STOP on

every turn. The routing depends on this field, so do not edit it by hand.

- `notes` — the model's running summary of what it knows about this person. This is the field you'll actually read.

Data store 2: `wa_messages`

One record per message, in both directions. This is the agent's memory.

FIELD NAME	TYPE	REQUIRED
<code>wa_id</code>	Text	yes
<code>role</code>	Text	yes
<code>content</code>	Text	yes
<code>msg_id</code>	Text	no
<code>created_at</code>	Date	yes

Suggested size: start at 5 MB and watch it.

What each field does

- `role` — `customer` or `agent`. The transcript sent to the model is built from this.
- `content` — the message text.
- `msg_id` — WhatsApp's own message ID. Useful for tracing a specific message.
- `created_at` — the sort key. The scenario pulls the most recent 15 records for a contact using this field, so it must be a Date, not Text.

Housekeeping

`wa_messages` grows forever. Two options:

1. **Leave it.** At single-broker volumes it will be years before you notice.
2. **Prune it.** Add a second scenario on a weekly schedule: search `wa_messages` where `created_at` is earlier than 90 days ago, delete those records. Six modules, ten minutes.

If the data store hits its size limit the scenario will start erroring on the AddRecord modules. That's the symptom to recognise.

Privacy note

These two stores now contain client conversations, names, and whatever people volunteered about their finances. That is personal information under the Privacy Act and it lives on Make's servers.

Read [compliance/compliance-pack.pdf](#) before you put real client data in here. At minimum your privacy policy needs to cover it, and you need a deletion path for someone who asks.