WhatsApp
Integration

USER GUIDE
WhatsApp Integration

WhatsApp Integration

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1. WhatsApp Integration

Integrating WhatsApp into our omnichannel app opens up a world of possibilities for seamless customer communication. By incorporating WhatsApp, we can tap into one of the most popular messaging platforms globally, enabling us to engage with customers on their preferred channels.

This integration not only enhances accessibility but also streamlines our communication efforts, allowing us to provide timely support and send notifications all within the familiar WhatsApp interface. With WhatsApp integration, we're poised to deliver an omnichannel experience, meeting customers wherever they are and ensuring a smooth, consistent journey across all touchpoints.

System Requirements

Before proceeding with the integration of WhatsApp into the Omnichannel setup, ensure that your system meets the following requirements:

1. **PBXware System:** You must have the PBXware system with Contact Center Edition version 7.2 or higher installed. This version is necessary to ensure compatibility with the WhatsApp integration features.

2. **gloCOM Client:** Ensure that gloCOM, the unified communications client for the PBXware system, is installed on your system with a version of 7.2 or higher. gloCOM provides essential functionalities required for seamless communication across channels.

3. **License Requirements:** To support WhatsApp integration, make sure you have enough agent licenses, enable supervisor licenses if needed (optional but recommended), and activate the OmniChannel module in your license.

4. **CMP Service:** The COMMSware Messaging Platform (CMP) is a custom solution that connects your omnichannel system with messaging platforms, helping to manage interactions and handle related data efficiently. It is a key requirement for integrating WhatsApp into your system.

By ensuring that your system meets these requirements, you'll be ready to proceed with the integration process smoothly and effectively. If you have any questions or need assistance with verifying your system's compatibility, please reach out to our support team for further guidance.

WhatsApp Integration Requirements

This table outlines the preconditions and requirements for integrating WhatsApp with PBXware. It distinguishes between requirements for partners and end-user companies.

Preconditions for channels setup on PBXware	WhatsApp (for partner)	WhatsApp (for end user company)
CMP deployment (VPS installation..) until 7.4	+	
CMP configuration (from 7.4)	+	
Personal Facebook account	Will be needed only in case of direct integration through Meta Cloud API (feature support has not yet been decided)	+
Facebook business page		
Meta business portfolio		+
Number without private WhatsApp already installed		+
Partner hub on Dialog 360	+	
Meta developer account	Will be needed only in case of direct integration through Meta Cloud API (feature support has not yet been decided)	
Meta app		
Verified business (completed Business verification)		
Channel setup on Meta app		
Meta app review (added permissions, data handling questions)		
Verified business as Tech provider (access verification)		

Figure 1. WhatsApp Integration Requirements

Partners: Responsible for technical setup, including CMP deployment and configuration, managing the Partner Hub on Dialog 360, and configuring Meta developer tools for WhatsApp channel functionality.

End Users: Responsible for providing required accounts (e.g., Facebook and Meta Business Portfolio) and a phone number without private WhatsApp installed for integration.

2. Partner Hub on 360 Dialog

Creating a Partner Hub involves the following steps:

- Enter your company name, country, contact name, and confirmation email.
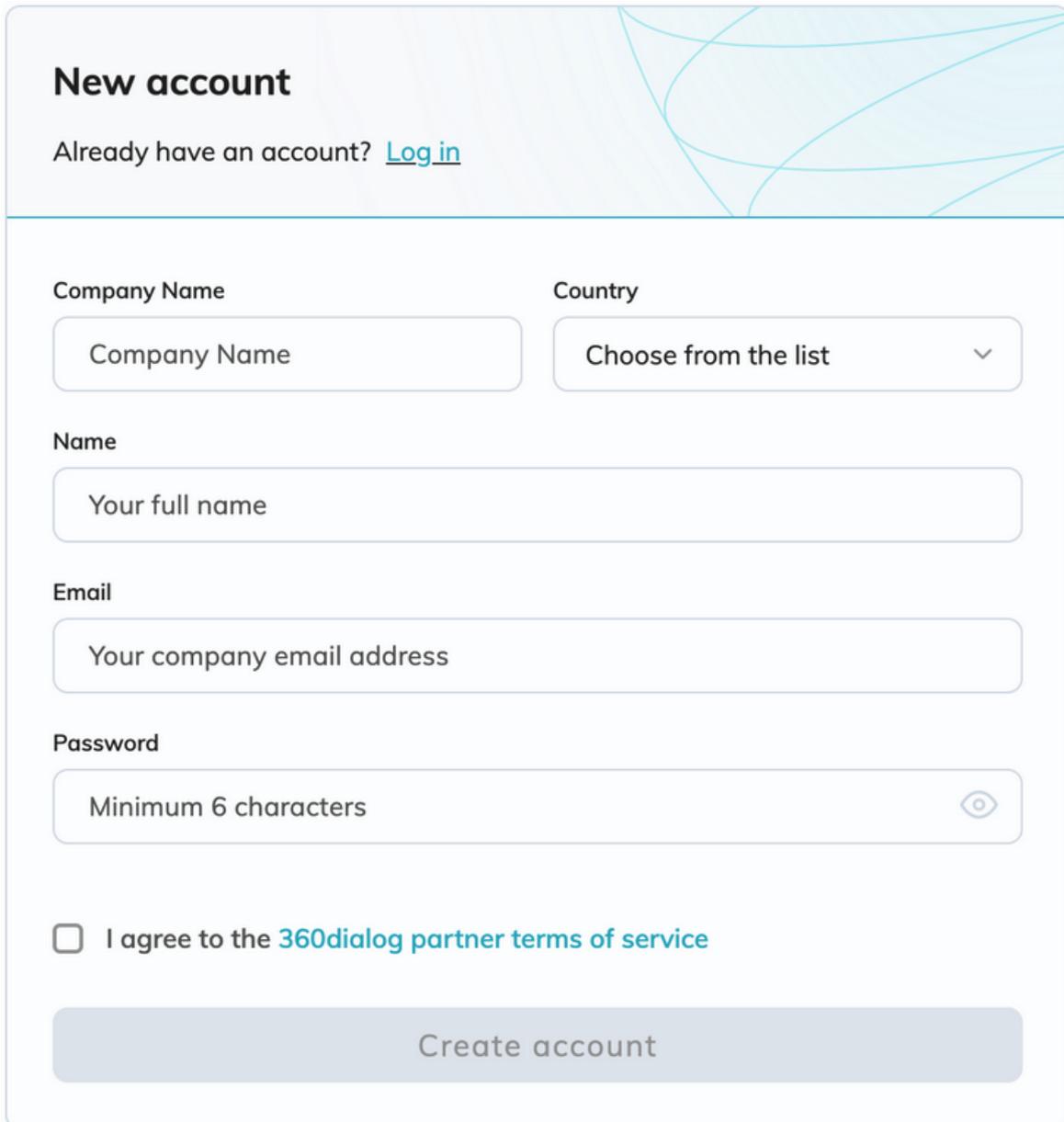
Figure 2. Partner Hub on 360 Dialog

- Choose a payment method: Client Payment or Partner Payment.

Figure 3. Partner Hub on 360 Dialog

- If you select Partner Payment, provide your credit card details.
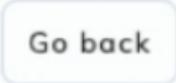
Figure 4. Partner Hub on 360 Dialog

- Select your preferred billing currency: USD or EUR.

Figure 5. Partner Hub on 360 Dialog

3. Meta Business Portfolio

To create a Business portfolio in Business Manager, follow these steps:

- **Visit Business Manager:** Go to the Business Manager website at _**https://business.facebook.com**_ and login with your Facebook or Instagram account.
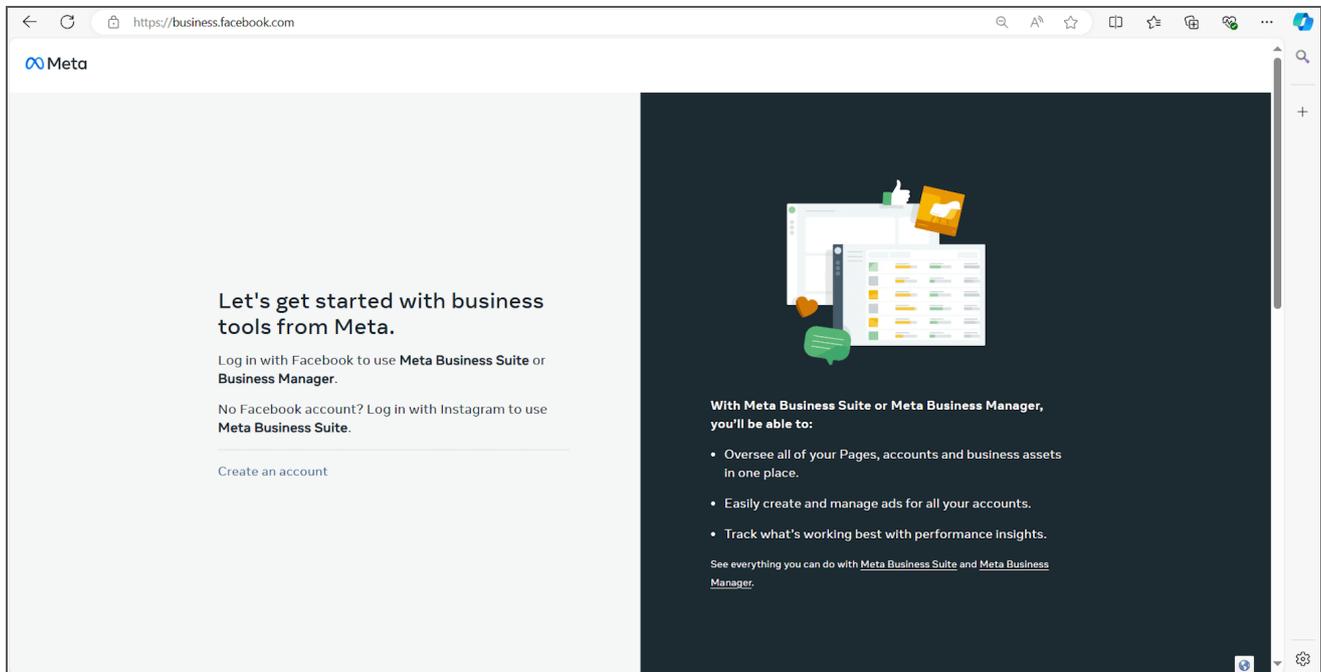
Figure 6. Create An Account

- **Create an Account:** Click on "Create an Account" to initiate the process. Enter all the required information into the respective fields. Click the "Submit" button.
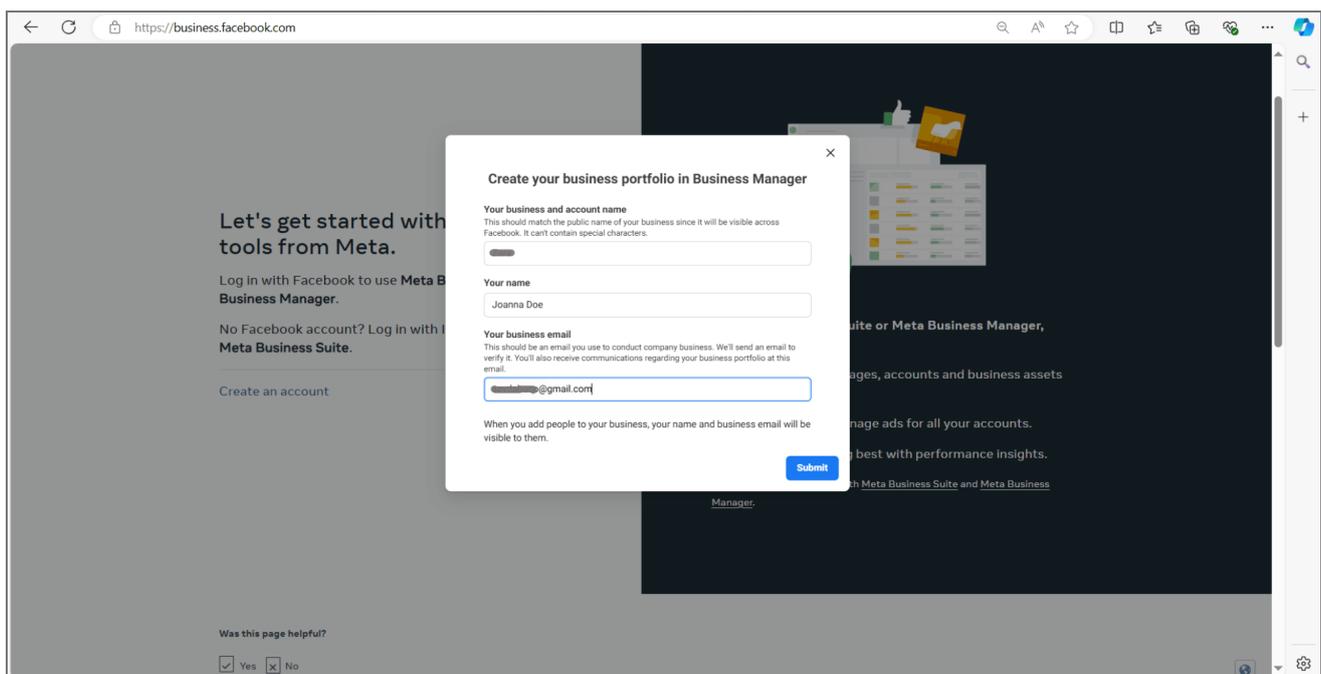
Figure 7. Business Info

- **Email Verification:** Please check your email for the verification message and verify the creation

of the Bussines portfolio.
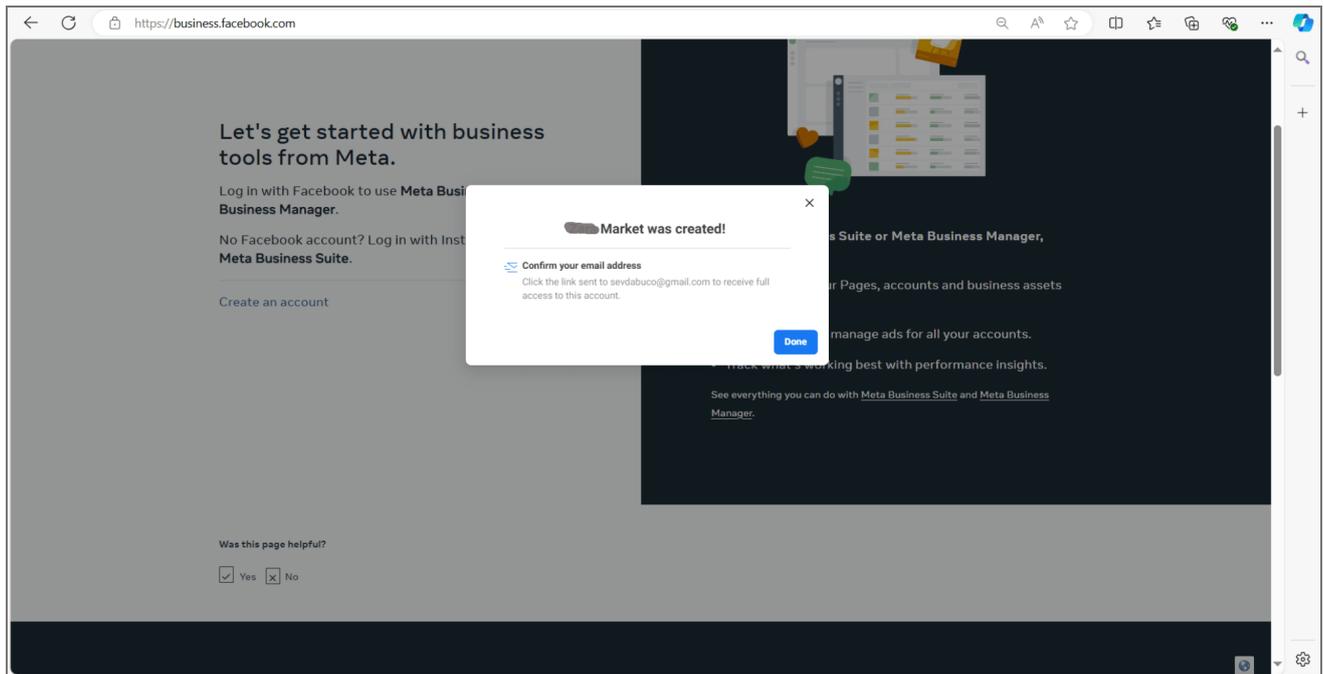
Figure 8. Email Verification

You will be taken to the homepage of your business account.

4. Phone Number

To be eligible for registration, business phone numbers must meet the following criteria:

- Owned by you

- Have a country and area code (shortcodes are not supported)

- Able to receive voice calls or SMS (You will receive an SMS message or a call to verify the registration of the number.)

> If you have a phone number registered with a WhatsApp account, you can disconnect that number from WhatsApp and use it for other purposes. Instructions on how to do this can be found in the WhatsApp developers documentation under the "Phone Numbers" section.

5. Configure CMP Settings within the PBXware System

Go to the Contact Center homepage and select "Settings" from the Messaging section in the left navigation menu.
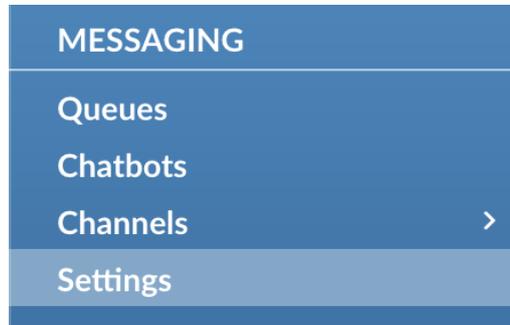
Figure 9. Pbxware Settings

Scroll down to the bottom of the page to locate the CMP section to connect your PBXware system with your CMP service. After providing the mode for running CMP, the public domain name of your service, and the API key, click the "Save" button.

> ℹ️   For more information about CMP running modes, refer to the CMP user guide.
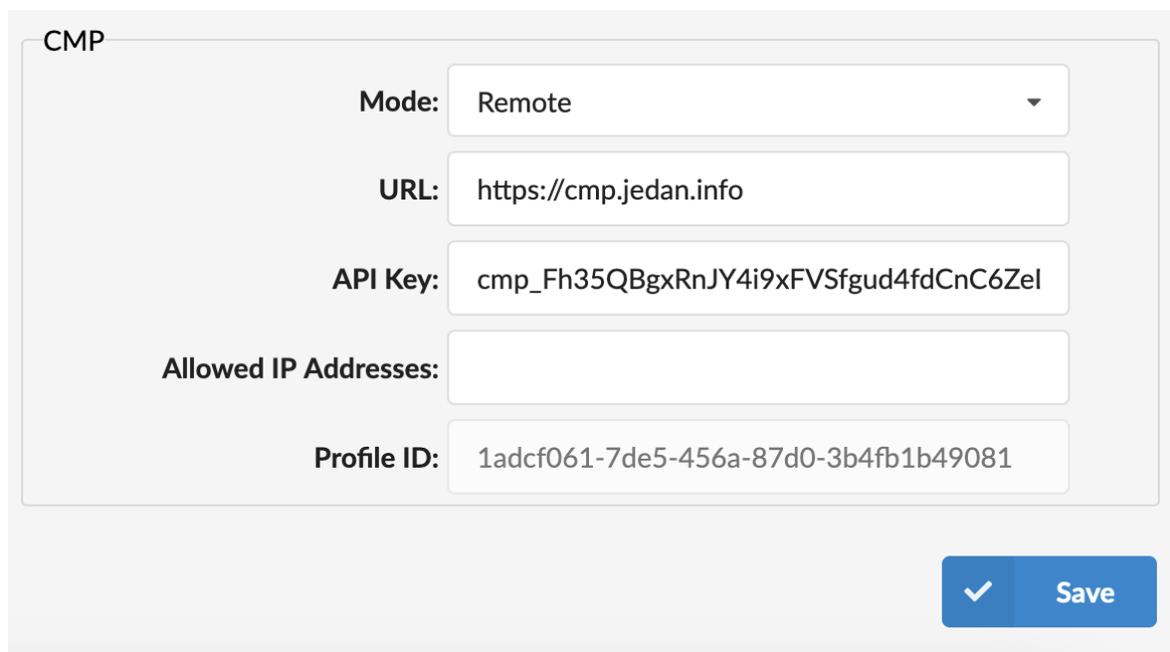
Figure 10. Omnichannel CMP Settings

6. Adding the WhatsApp Channel within the PBXware

Getting Started

Locate the Channels Section

To access the Channels section, navigate to the **MESSAGING** section within the Contact Centre Module. Clicking on **"Channels"** will lead you to a page where you can view a list of available channels.

Initiate Channel Creation

To initiate channel creation, simply click on the **"Add Channel"** button, which will prompt the channel creation dialog to appear.

Channel Options

When the dialog is open, you'll find options for creating a channel for Live Chat, SMS, Email, Facebook, or WhatsApp.

Figure 11. Channel Type

Channel Type

To begin the process of creating a WhatsApp channel, select the WhatsApp channel type.
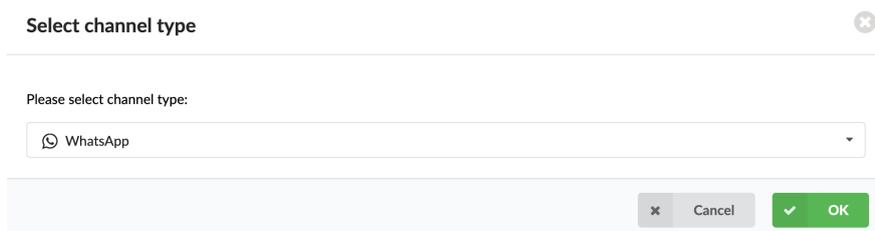
Figure 12. WhatsApp Channel Type

Confirm your selection by clicking **"OK"** to finalize it and proceed with the setup of the channel.

Setting Up Your WhatsApp Channel

After confirming the creation of your WhatsApp channel, you'll be directed to the next window.
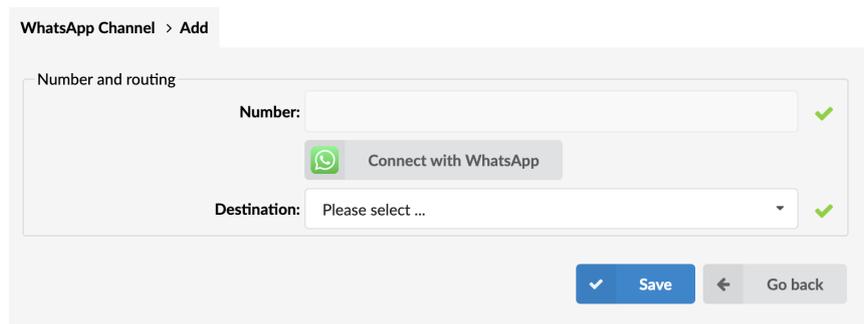
Figure 13. Setting Up WhatsApp Channel

- The first option (Number) cannot be edited; it will be automatically populate once you connect your WhatsApp account.
- The "Connect with WhatsApp" button allows you to link your WhatsApp account with the system, enabling integration of the WhatsApp channel.
- The Destination field enables you to select a messaging queue to handle queries received via the WhatsApp channel.

The next step is to click the Connect with WhatsApp button, which will prompt you to the CMP window.

Setting Up CMP and Connect With WhatsApp

When you click the "Connect with WhatsApp" button, a new CMP window will appear.

Figure 14. Setting Up CMP

Simply continue by clicking the "Connect with WhatsApp" button on this window.
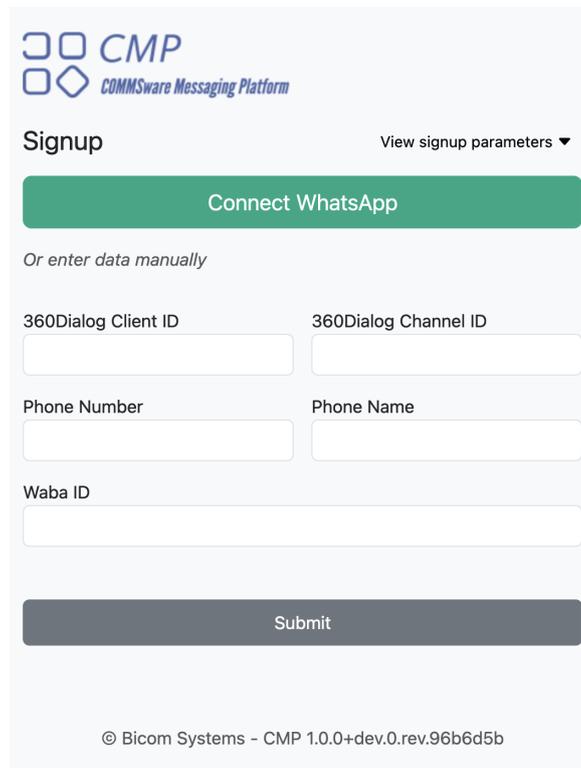
> There's no need to manually add information such as '360Dialog Client ID', '360Dialog Channel ID', 'Phone Number', etc., as these fields will be automatically populated once you connect with your WhatsApp account.

Next, you will be redirected to the 360 dialog page, where you need to create your account or log in if you already have a 360 dialog account.

Sign Up for 360Dialog Account

You can begin by indicating whether your organization is classified as a company or a government agency.
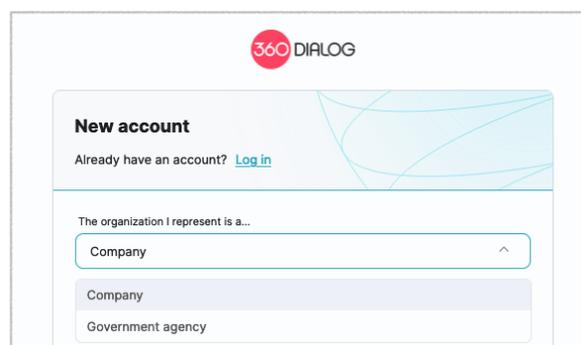
Figure 15. Sign Up for 360Dialog

Enter your company's name and choose your country from the provided options. Add your company's email address and provide a secure password for your account. This will serve as your login credentials for accessing the 360 Dialog platform.

Figure 16. Sign Up for 360Dialog

Next, you can select Capture Verification to confirm you are not a robot.

Before proceeding, take a moment to read through the Terms of Service. It's essential to understand the terms and conditions governing the usage of the 360 Dialog platform.

After reviewing the Terms of Service, click the option to create your account.

> ⓘ Due to Meta's policies regarding the creation of Governmental Agency accounts, we will not cover that use case since Governmental Agency companies must get approval before creating WhatsApp Business accounts.

On the next window, you will be asked to verify your email via a one-time passcode.
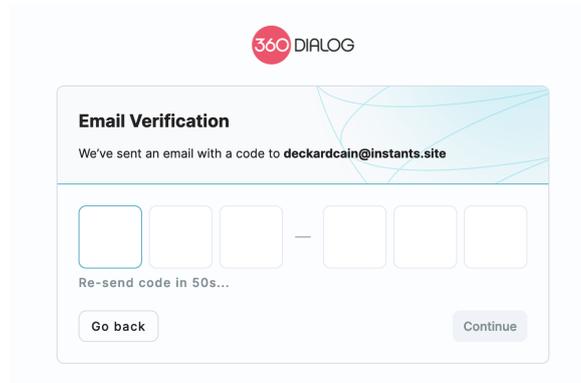
Figure 17. Verify Your Email

Completing the account creation process will send a verification code to your email address.

Check your email for the code, enter it into the provided field, and when you're ready, click the "Continue" button.
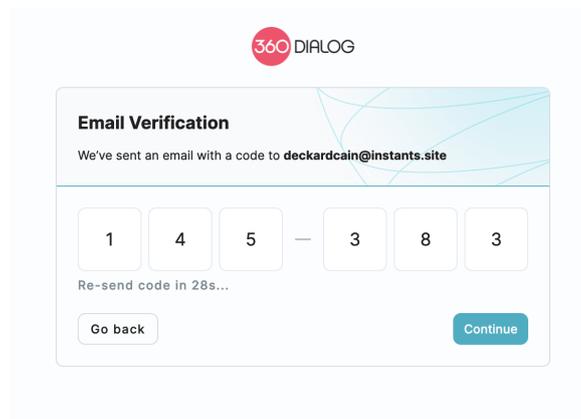
Figure 18. Verify Your Email

> ℹ️ Please note that you have 60 seconds to enter the code before it expires.

Once you've successfully submitted your code and your email is verified, you can proceed to start the WhatsApp registration process on the next window.

On the window presented, you'll need to confirm the status of your phone number.
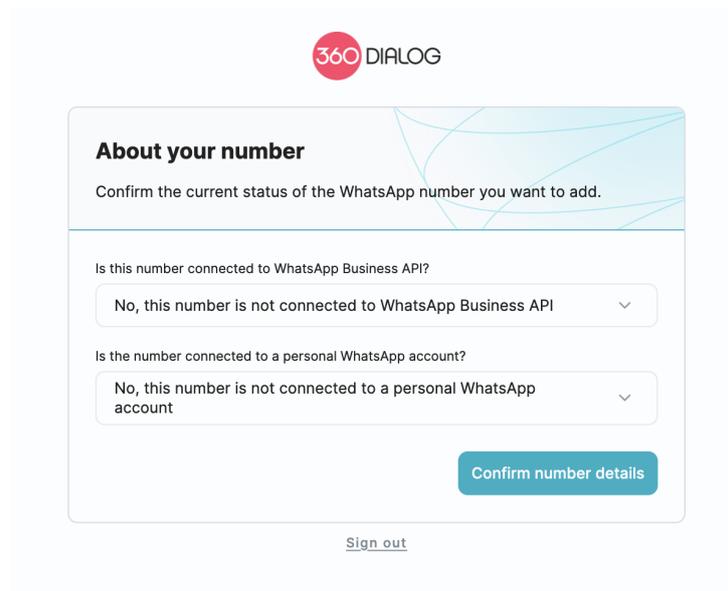
Figure 19. Information About Your Number

Indicate whether your number is connected to the WhatsApp Business API or if it is associated with a personal WhatsApp account.

Click the Confirm number details button, to proceed with the integration process. This action will confirm the status of your phone number and allow you to continue with the setup.

As we proceed, we'll now initiate the embedded signing process. This involves accessing your Meta account, selecting or creating a new WhatsApp business account, and assigning a phone number to your account.
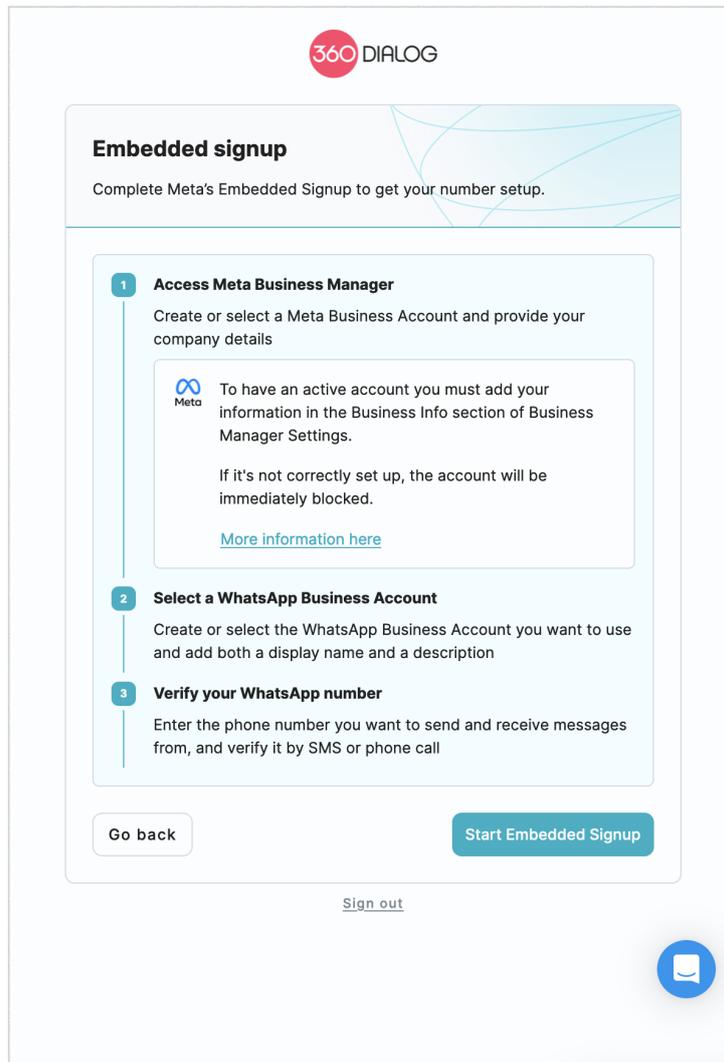
Figure 20. Embeded Signup

Proceed by clicking on the Start Embedded Signing button.

Next, you will be asked to log in with Facebook, or if you are already logged in, simply continue as a Facebook user.
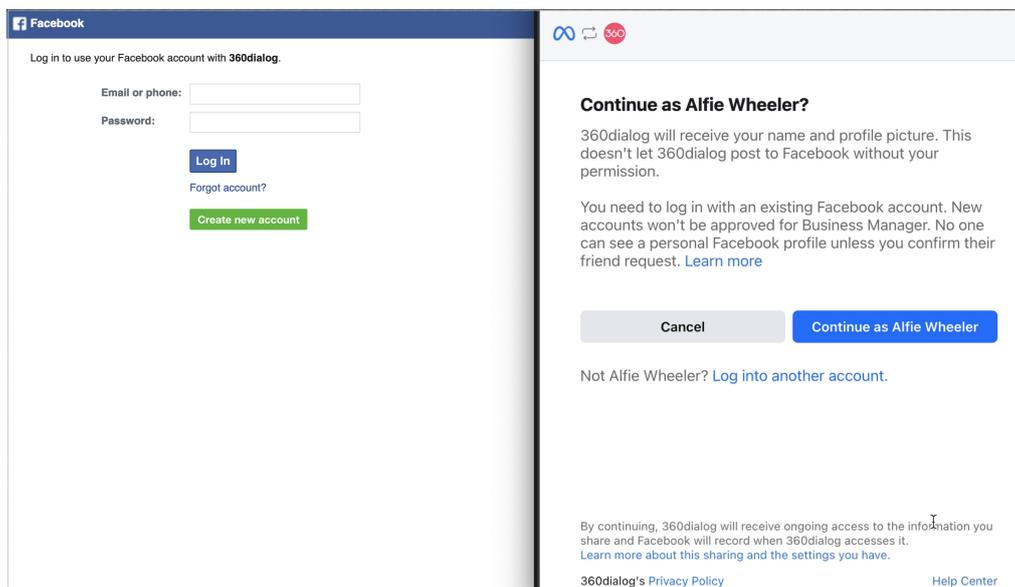
Figure 21. Continue With Facebook

To proceed with the setup, click the Get Started button.
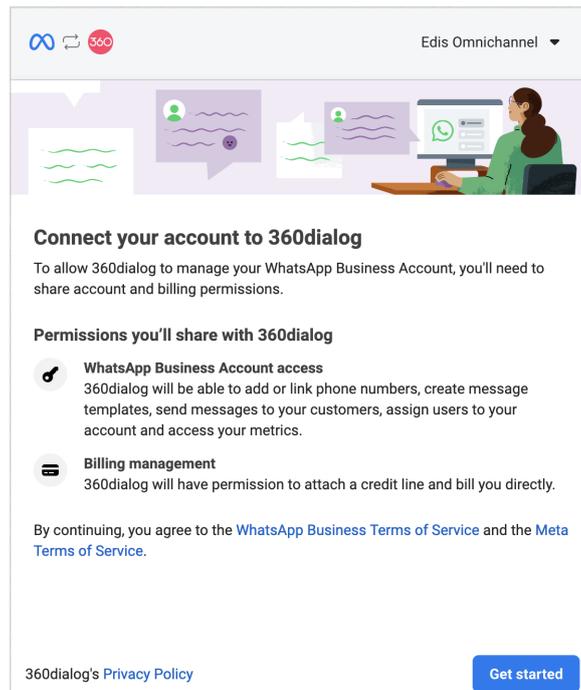
Figure 22. Get Started

In this step, you'll need to provide your business information so you can set up your WhatsApp business profile.

Figure 23. Business Info

You can add your business name, business email, and company's public website here. Please ensure that the website is accessible to the public.

Finally, select your country and click Next.

In the following window, you will be prompted to create a new business account or select an existing one.

Figure 24. Business Account and Profile

Additionally, you have the option to select an existing business profile or create a new one.

To proceed with the setup click the Next button.

In this step, you'll create your WhatsApp business profile, which will display information about your business to people on WhatsApp.

Figure 25. Create Business Profile

Add a Business Account name and WhatsApp Business display name, and select the category that best describes your business.

To proceed with the setup click the Next button.

In the next window, you will be required to add a phone number. Please ensure that the number you provide is unique, meaning it has not previously been used on WhatsApp.

Figure 26. Add Phone Number

If you enter a phone number that is already associated with WhatsApp, you will receive a notification.
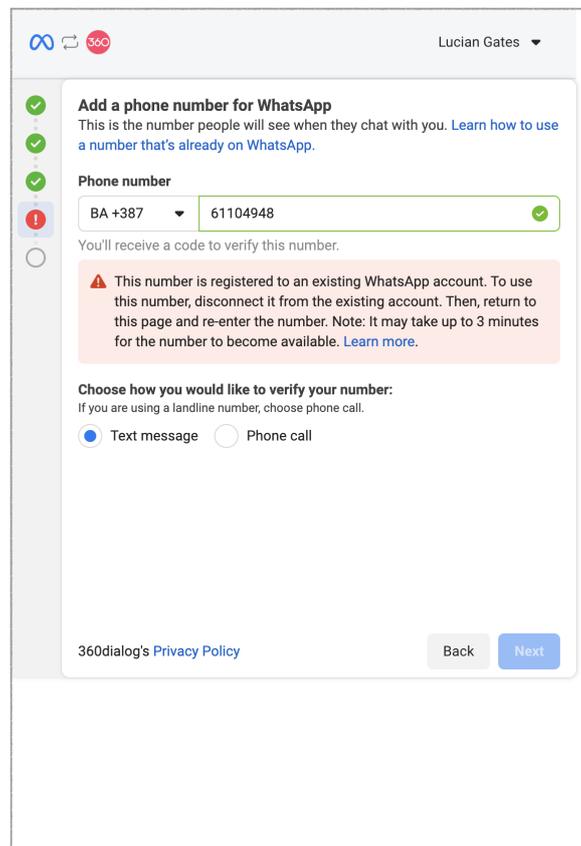
Figure 27. Failed to Add Phone Number

You can choose how to verify your number (via SMS or phone call) and click the next button.

> If you already have your number connected to your WhatsApp account and you want to register that same number to your WhatsApp Business Account, please follow the instructions explained on this link.

Figure 28. Instructions

This window displays the SMS verification code, and once received, enter the code and proceed with the process.

Figure 29. Verification Code

> Please keep in mind that you have 60 seconds to enter the code or you will have to repeat the process.

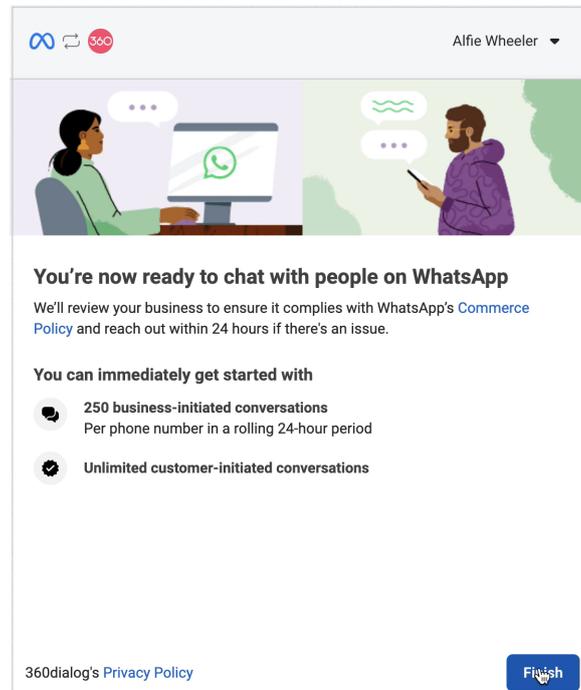Next, you will click Finish and wait a few minutes to set up your account.

Figure 30. Finish the Setup

You will need to wait for some time at this stage while everything is being set up. If there are too many requests at that moment, you will receive a corresponding notification.

After the setup is completed, you will need to select the numbers you will grant permission to the partner to access WhatsApp Business API.
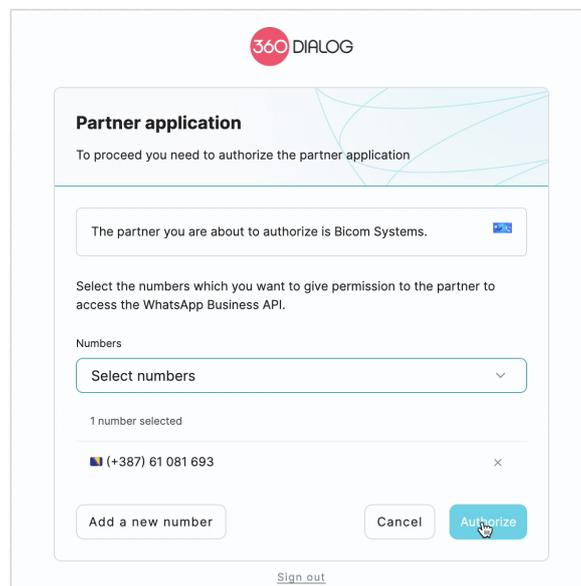

Figure 31. Grant Permission for Number

When you select a desired number or numbers, click the Authorize button. Then you'll be automatically redirected to the CMP window.

Figure 32. CMP Window Polulated

As you follow the integration process from the beginning, you don't have to add any data manually within this window.

All the necessary data required for integration will be automatically filled in.

You can simply proceed by clicking the submit button. After submitting the data, you'll be redirected to the PBXware system.


Figure 33. Successfully Completed Process

Here, you can select the destination queue for your WhatsApp channel.

Once you've selected the destination queue, click the Save button to save the configuration. This will finalize the setup and ensure incoming messages from the WhatsApp channel are routed to the designated queue within PBXware.
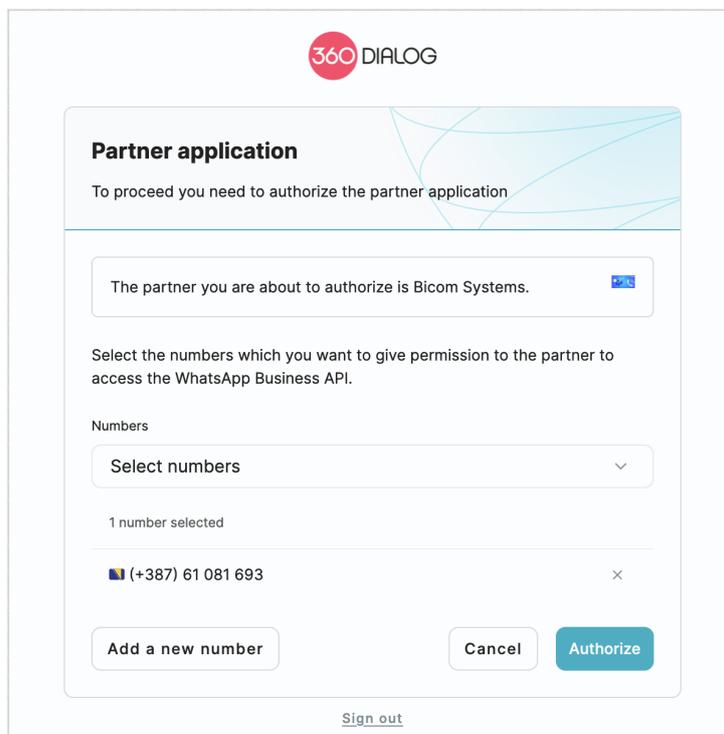
Login with 360 Dialog Account:

If you already have a 360Dialog account set up for WhatsApp integration, you can proceed by logging into your existing account.
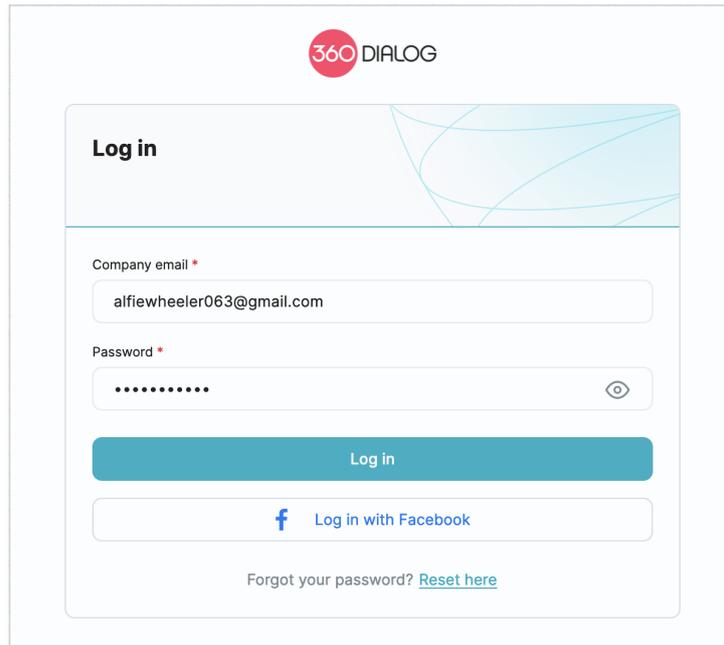
Figure 34. Login with 360 Dialog Account

Logging in with your 360dialog account is straightforward: enter your email and password, then click the login button. You'll be prompted to select a number you want to give permission to the partner to access the WhatsApp Business API.

Figure 35. Select Number

After clicking 'Authorize,' you will be directed back to the CMP window, where all data will be populated accordingly.

Figure 36. CMP Window Polulated

After clicking the "Submit" button, you'll be redirected back to the PBX GUI. From there, you'll need to select the destination queue for WhatsApp channel.

Figure 37. Successfully Completed Process

To confirm the creation of the WhatsApp channel, select destination queue and click on the "Save" button.

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