

Giosg Whatsapp integration - Meta account setup

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1. Integration overview

With Giosg Whatsapp integration you can send messages from Giosg to Whatsapp and receive messages from customers using Whatsapp.

This setup process should be completed in an implementation meeting together with a Giosg Customer Success team member and someone with access to the Meta Business manager and can create Meta apps. The final section on Templates is optional and can be completed after the initial setup is completed and tested.

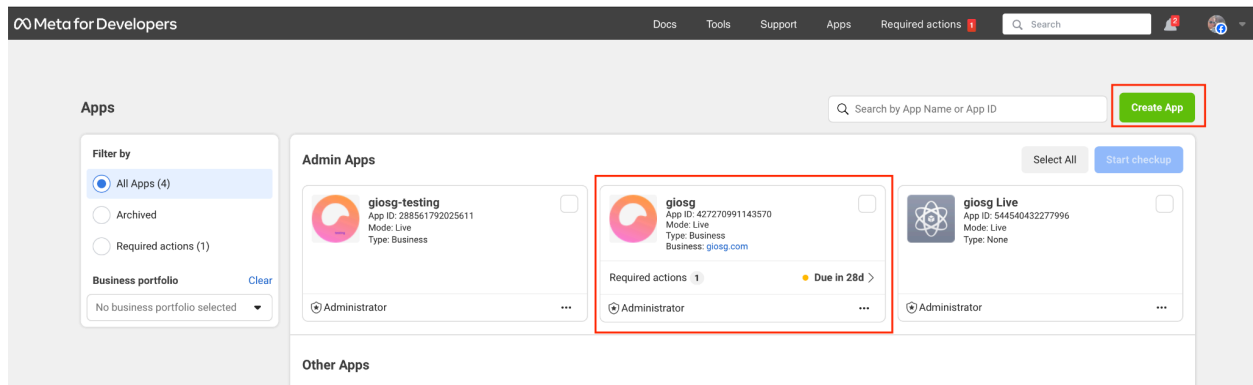
2. Prerequisites

- Facebook/Meta account with Meta Business Manager permissions.
 - Meta requires extensive permissions to be able to set up Whatsapp. Access is needed to <https://developers.facebook.com/apps/> and <https://business.facebook.com/>
 - Your business needs a Meta Business portfolio. Read about creating one: <https://www.facebook.com/business/help/1710077379203657>
 - Read about Business portfolio access: <https://www.facebook.com/business/help/442345745885606>
- Phone number (and device) capable of receiving SMS messages, and which is not already connected to a WhatsApp account.
- A callback url and token for connecting Meta to giosg, provided by giosg.

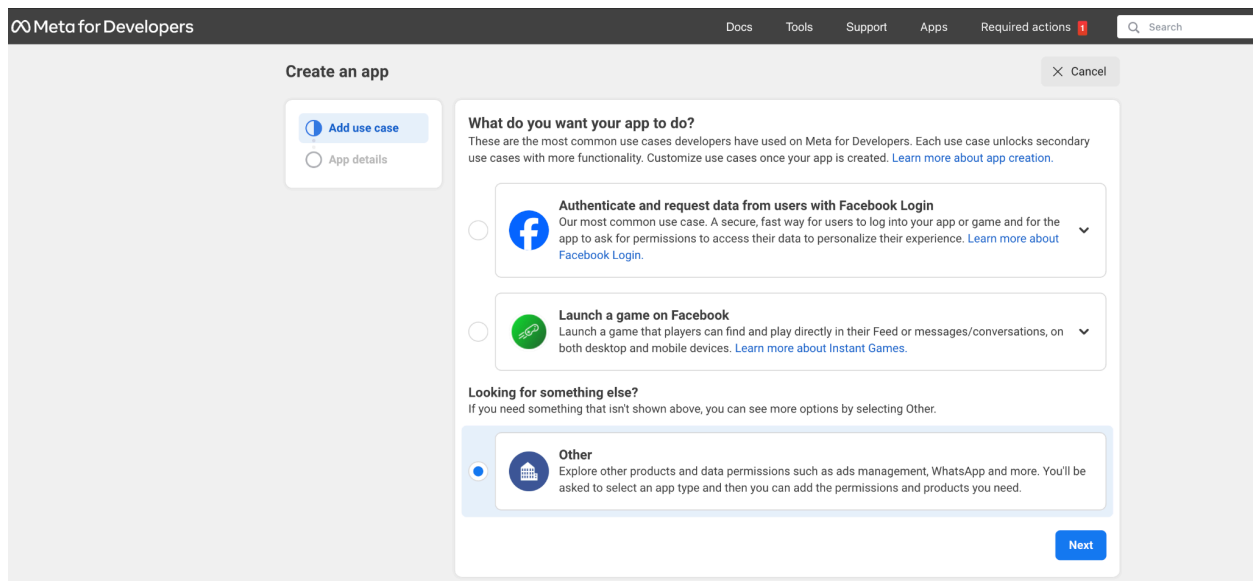
3. Creating a Meta app for Whatsapp on the Meta Developer console

Start by navigating to the Meta for Developers site and to Apps listing page at <https://developers.facebook.com/apps/>.

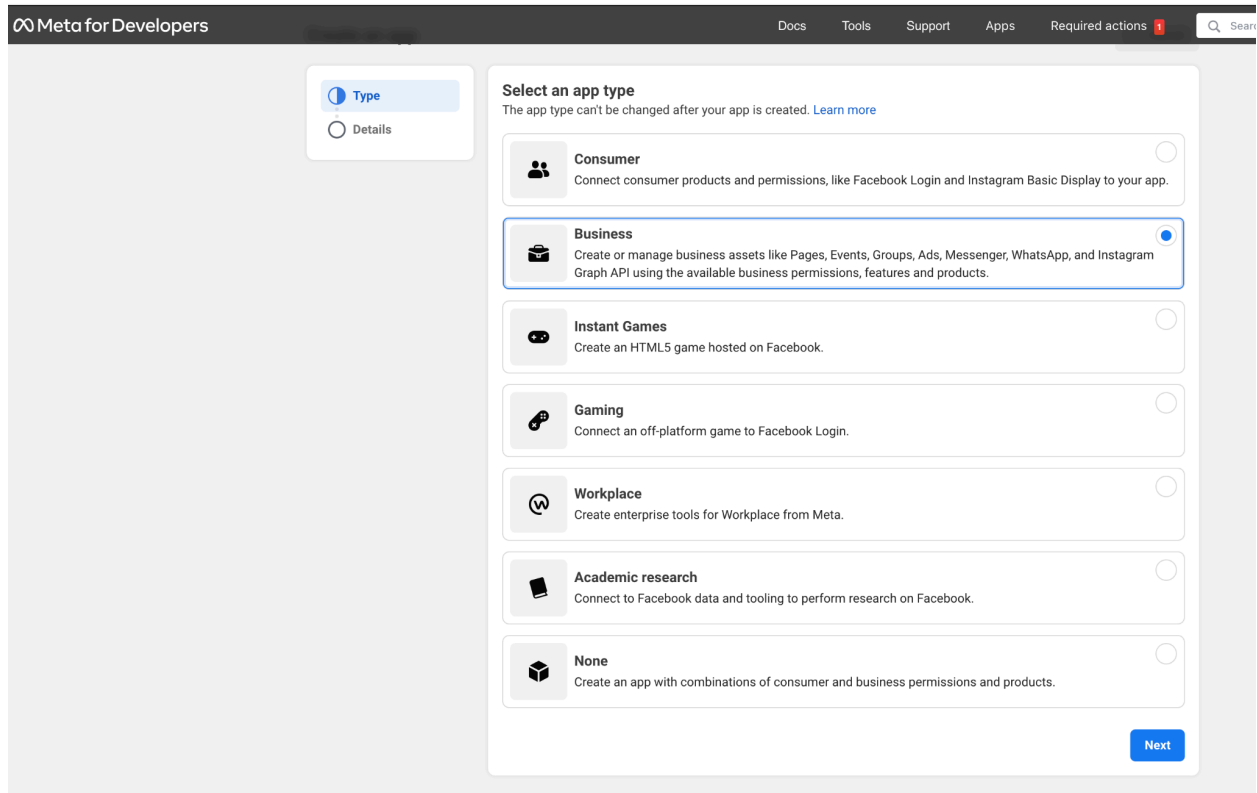
3.1 Click “Create App” to create a new app:



3.2 Select “Other” under “What do you want your app to do?” and click “Next”

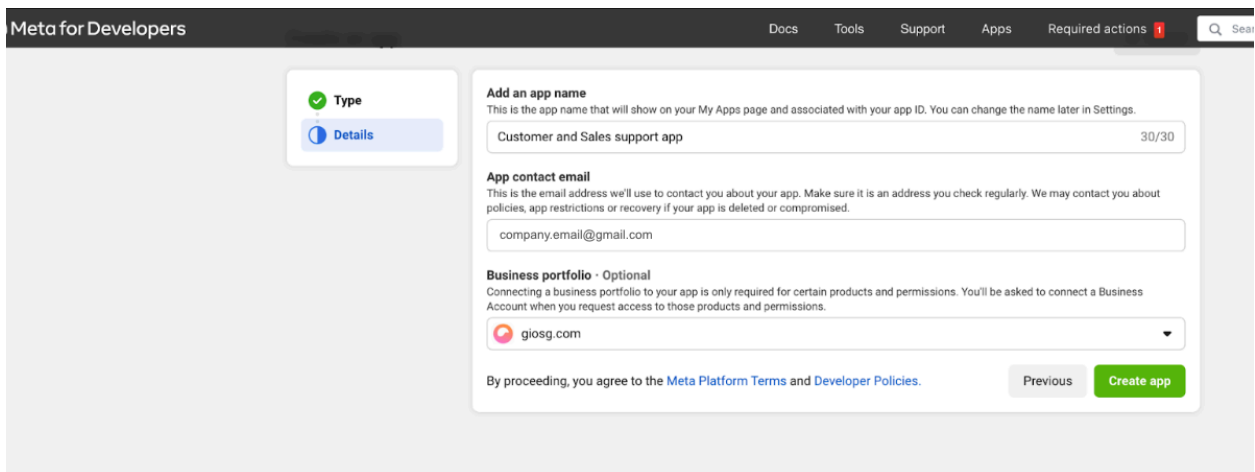


3.3 On the next page select “Business” for the app type, then click “Next”.



3.4 On the final screen of the app creation wizard, give a name and contact email for your app. Note that the name cannot contain Meta trademarks like “Whatsapp”. Select your business from the “Business portfolio” dropdown and click “Create app”

Important: The “Business portfolio” - is required for Whatsapp use cases. If you don't have one created yet, it can be left empty at this stage but needs to be created through [app settings](#) before being able to use Whatsapp features. This is one reason why your meta account needs sufficient permissions to access the selected Business.

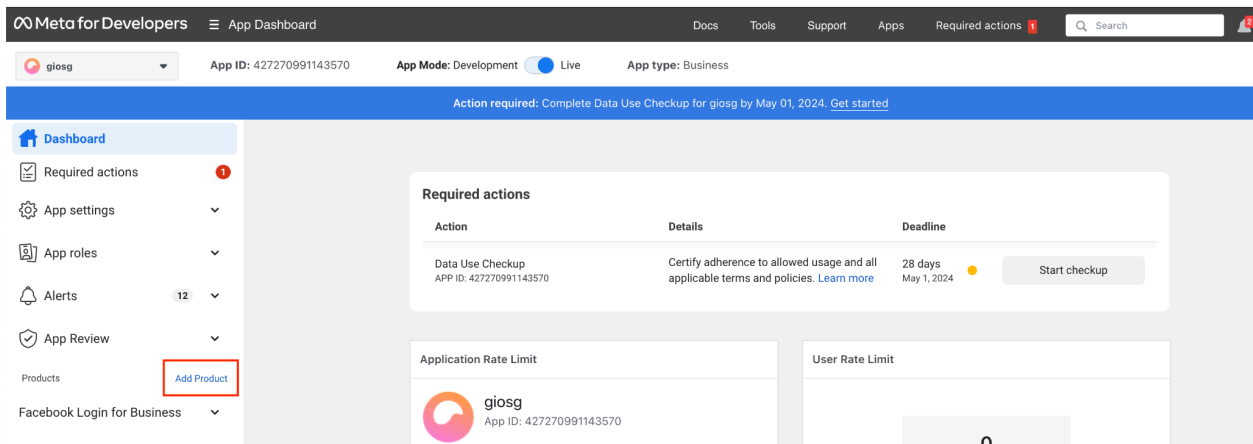


The screenshot shows the 'Meta for Developers' interface for creating an app. The top navigation bar includes 'Docs', 'Tools', 'Support', 'Apps', and 'Required actions' with a red notification icon. A search bar is on the right. On the left, a sidebar shows 'Type' (selected with a green checkmark) and 'Details'. The main content area is a form with three sections: 'Add an app name' with a text input containing 'Customer and Sales support app' and a character count '30/30'; 'App contact email' with a text input containing 'company.email@gmail.com'; and 'Business portfolio - Optional' with a dropdown menu showing 'giosg.com'. At the bottom, there is a disclaimer: 'By proceeding, you agree to the [Meta Platform Terms](#) and [Developer Policies](#).' and two buttons: 'Previous' and 'Create app'.

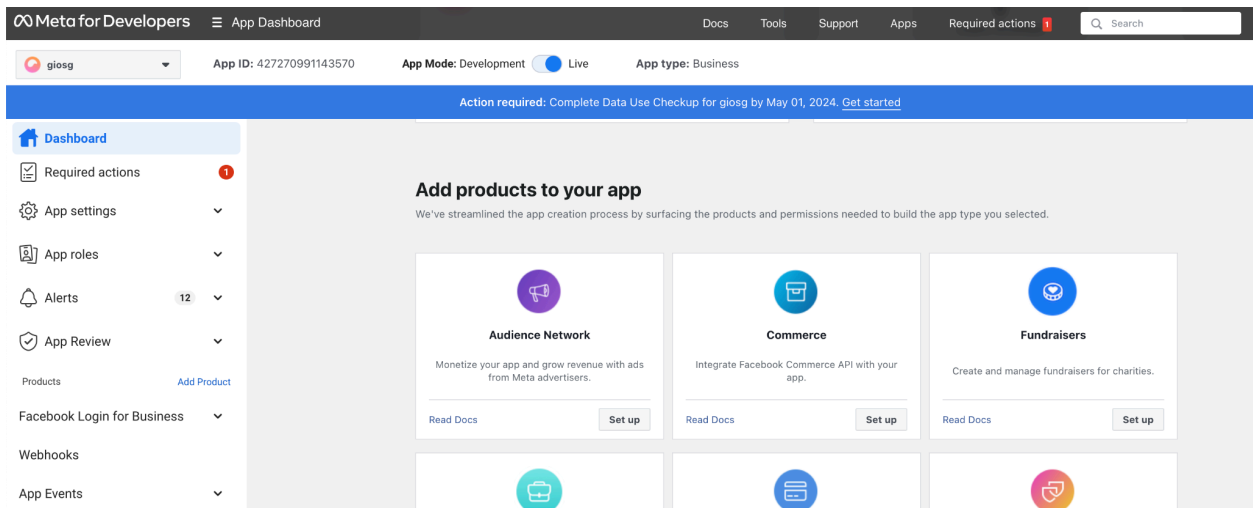
4. Configuring the Meta app for Whatsapp

After you clicked “Create app”, you should land on the view below. Here we need to add the Whatsapp product to our app and configure it.

4.1 From the left side panel, click “Add product”.



4.2 Find the “Whatsapp for Business” app from the list and click “Set up”.



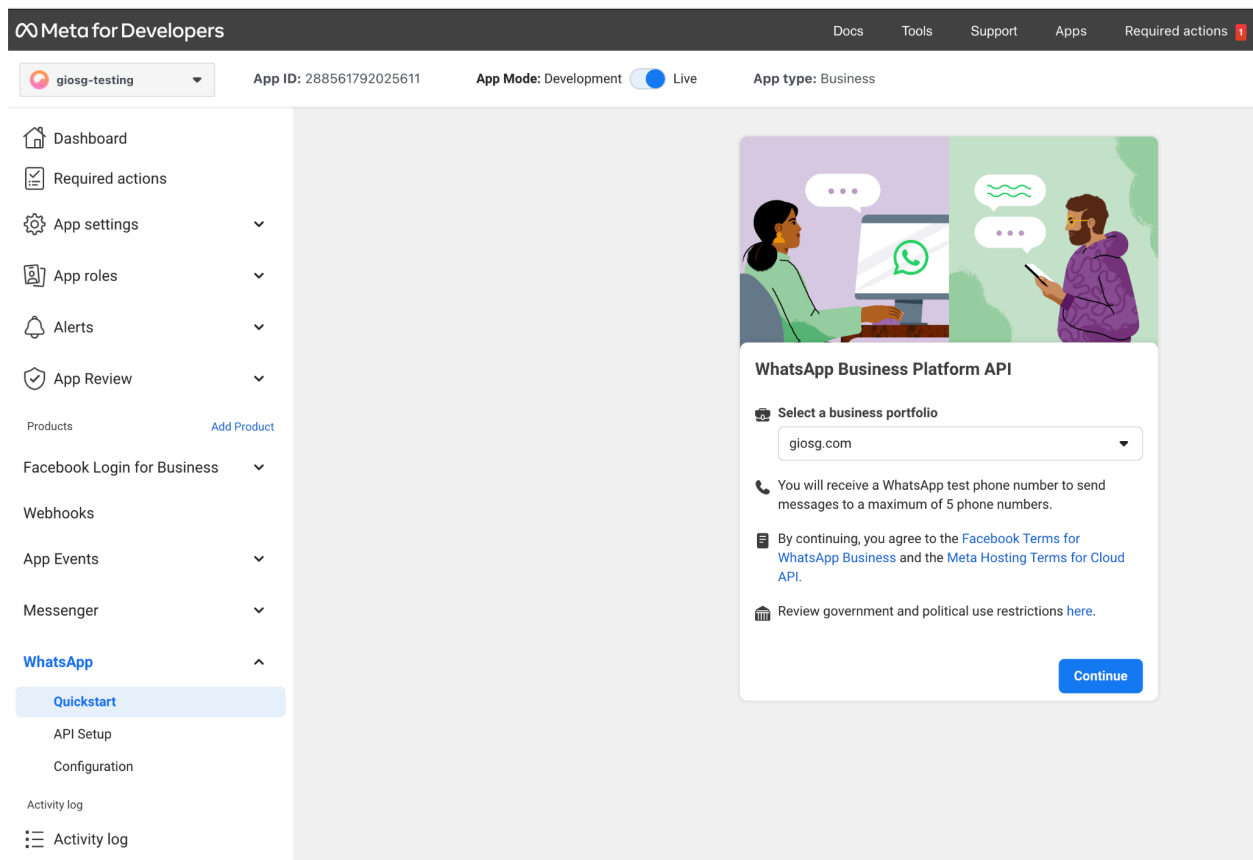
4.3 After clicking “setup”, you will end up on the Whatsapp Quickstart page. If you did not select a Business Portfolio earlier on the process, now you need to select or create one. If you selected it earlier, this step should not be shown.

Facebook Terms for Whatsapp Business:

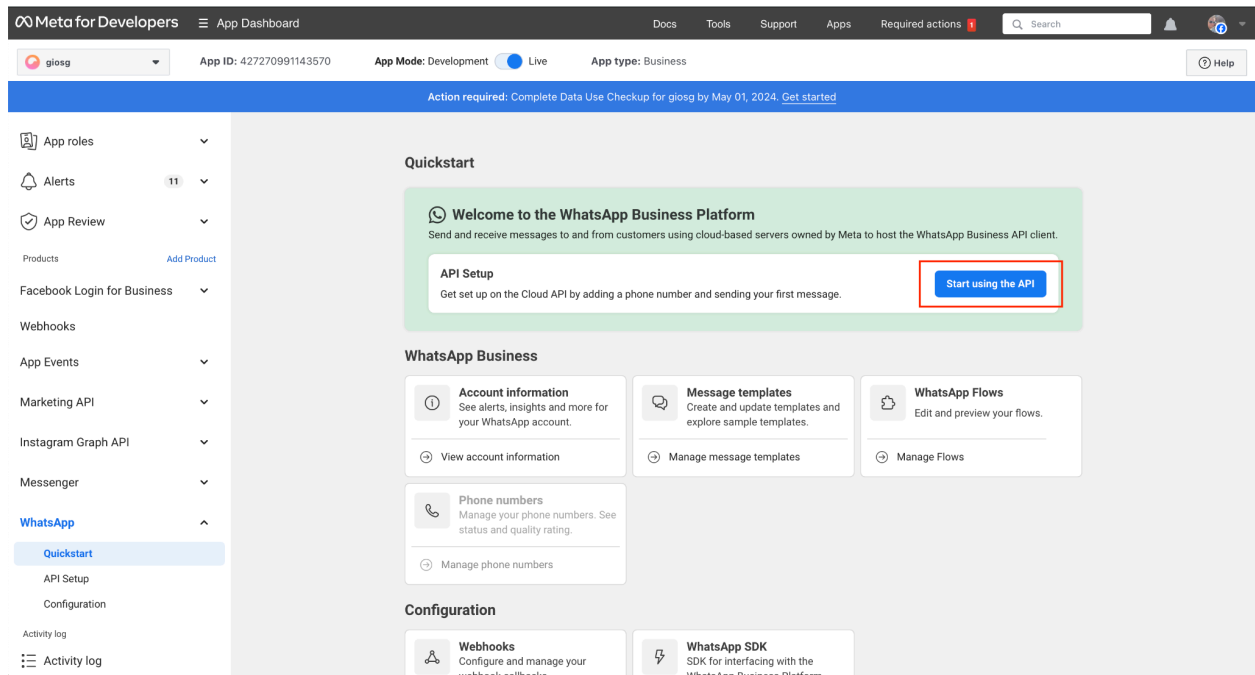
<https://www.whatsapp.com/legal/meta-terms-whatsapp-business>

Meta hosting Terms for Cloud API:

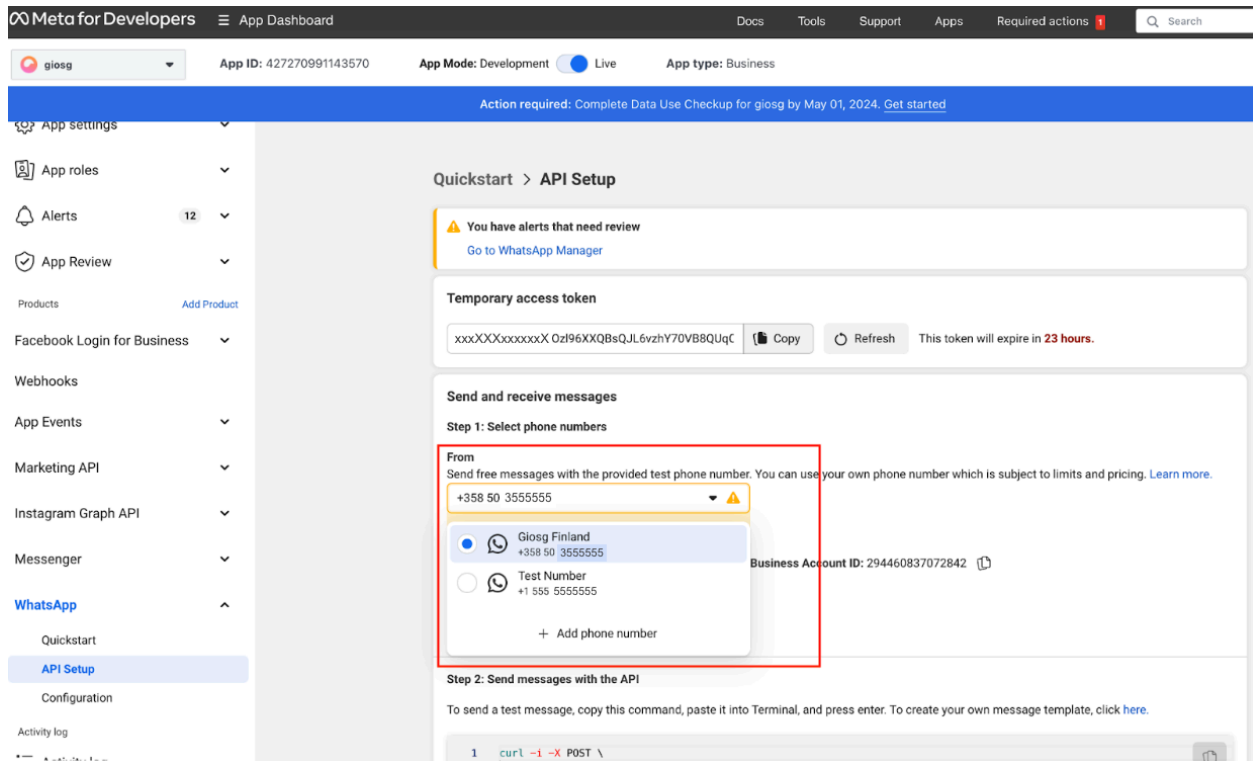
<https://www.facebook.com/legal/Meta-Hosting-Terms-Cloud-API>



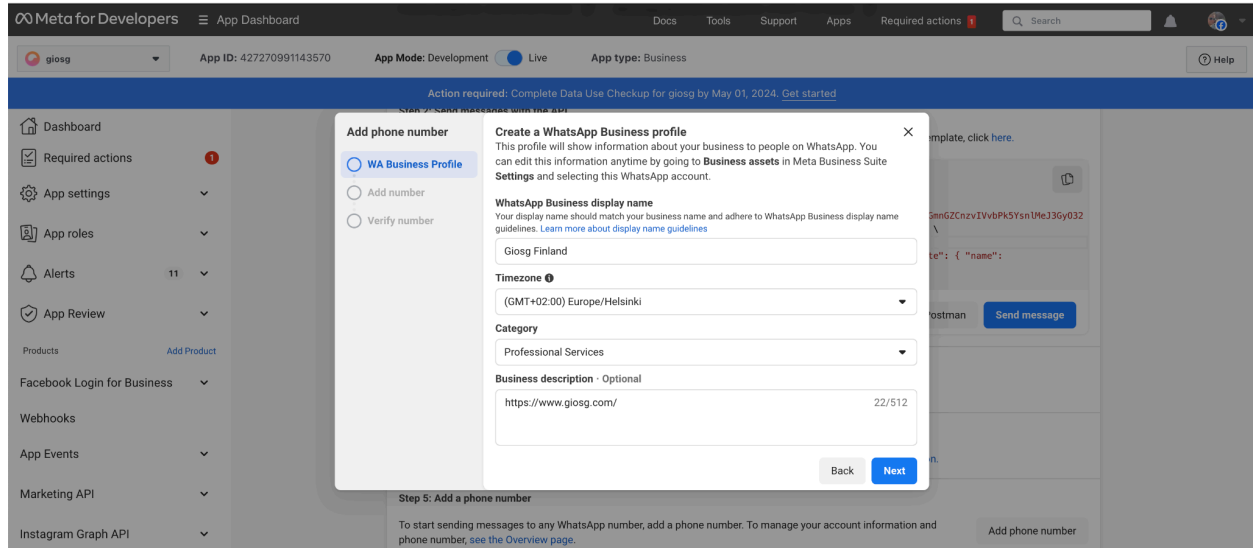
4.4 After selecting “Continue”, or if you had already selected a business portfolio, you should access the Quickstart view below. Click the “Start using the API” button there to get started:



4.5 First you need to add a phone number on the screen below. Click the “From” dropdown and select “add test number” - you need to do this first before you can add a real number. After adding the test number, click the dropdown again and select “Add phone number”.

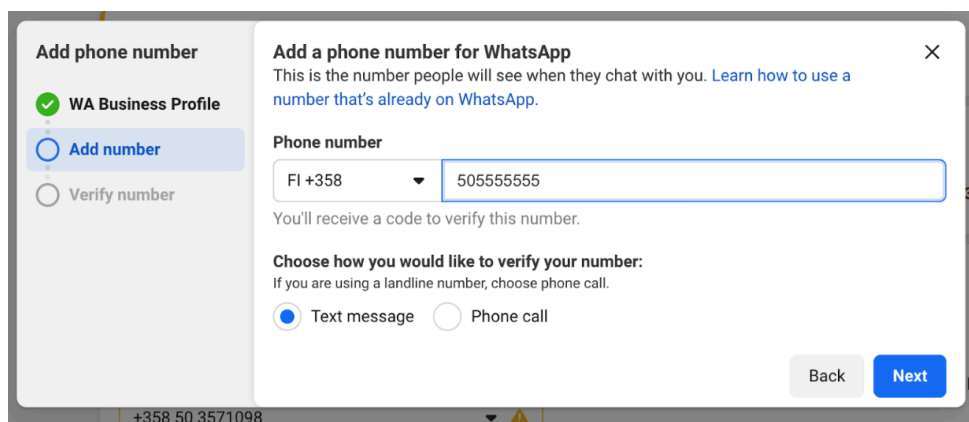


4.6 A wizard will open where you will need to first give a name for your number - as the “WhatsApp Business display name” and some other information.



4.7 On the next “Add number” screen, input the phone number and select a number verification method. SMS is recommended. Click “Next” and insert the verification code you receive.

Important: If you mistype the code or you cannot receive it with SMS, the verification cannot be retried instantly again and can take multiple hours before you can try again so make sure you can receive SMS.



After confirming the SMS code, the following API call needs to be made to

register the number to account with the certificate which can be found from whatsapp manager:

```
curl -X POST \  
  'https://graph.facebook.com/v21.0/<phone number id>/register' \  
  -H 'Authorization: Bearer <access token >' \  
  -H 'Content-Type: application/json' \  
  -d '{"messaging_product": "whatsapp", "certificate": "<certificate>", "pin": \  
  "<sms pin code>"}
```

4.8 Create a test message on the “API Setup” page by writing your own (personal) Whatsapp number in the “To” field and run the curl command in a terminal, or use Postman. You should receive a “Hello world” message.

Send and receive messages

Step 1: Select phone numbers

From
Send free messages with the provided test phone number. You can use your own phone number which is subject to limits and pricing. [Learn more.](#)

+358 50 3555555

Messaging may be unavailable. [Review issue](#)

Phone number ID: 27788883000000 WhatsApp Business Account ID: 29988883000000

To

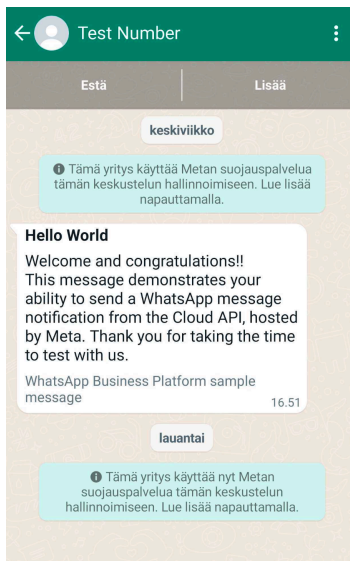
FI +3... 5055555555

Step 2: Send messages with the API

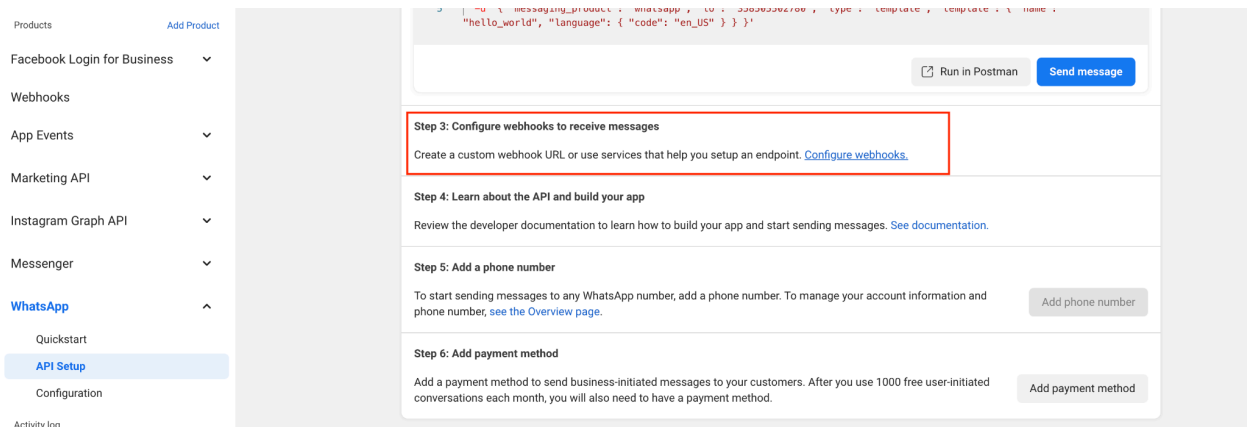
To send a test message, copy this command, paste it into Terminal, and press enter. To create your own message template, click [here](#).

```
1 curl -i -X POST \  
2   https://graph.facebook.com/v18.0/274553265739120/messages \  
3   -H 'Authorization: Bearer  
EAAGEmcemyPIB0zL96XXQBsqJL6vzhY70VB8QU0mjUn1pJdDiZC4M5GcUjSYKq03pvN0AC3kBzjBZBfpRt8BY5C5gIvFw6267LUVt6iT02Hwk10W8dA90  
1LxSDQq7TFzbMNbnQYL3dvGMi2onfWkKsantmrE1rodyxspcEJsC0gSqJM4FcnNHEZCN0STaxZAAA0ZBGD' \  
4   -H 'Content-Type: application/json' \  
5   -d '{"messaging_product": "whatsapp", "to": "3585055555555", "type": "template", "template": { "name":  
"hello_world", "language": { "code": "en_US" } } }'
```

Run in Postman Send message



4.9 Next we need to configure the app to send webhooks to giosg Workflow Builder when Whatsapp messages are received. Click the “Configure webhooks” link on the “API Setup” page.



4.10 On the configuration page, first add your giosg callback url and verification token by clicking the “Edit” button. Then, click “Manage” to pick which webhooks you want to receive.

Important: These settings are not saved if you don't have at least one configured and verified phone number.

The screenshot displays the 'Quickstart > Configuration' page in the Giosg interface. On the left is a navigation sidebar with items like 'Required actions', 'App settings', 'App roles', 'Alerts', 'App Review', 'Products', 'Facebook Login for Business', 'Webhooks', 'App Events', 'Marketing API', 'Instagram Graph API', 'Messenger', 'WhatsApp', and 'Quickstart'. The main content area is titled 'Quickstart > Configuration' and contains several sections:

- Webhook:** Includes a description, a 'Callback URL' field with the value 'https://api.giosg.com/workflow_builder/public/webhook/87b0e28...', a 'Verify token' field with a masked value, and an 'Edit' button.
- Webhook fields:** Shows 'messages' and a 'Manage' button.
- Permanent token:** Includes a link to 'Learn how to create a permanent token'.
- Phone numbers:** States 'You have 1 production number and 1 test number.' and has a 'Manage phone numbers' button.
- Test account:** Includes a 'Delete your business' section with a 'Delete' button.

4.11 In the Webhook fields selection popup select at least “Messages” and the highest API version, then click “Done”.

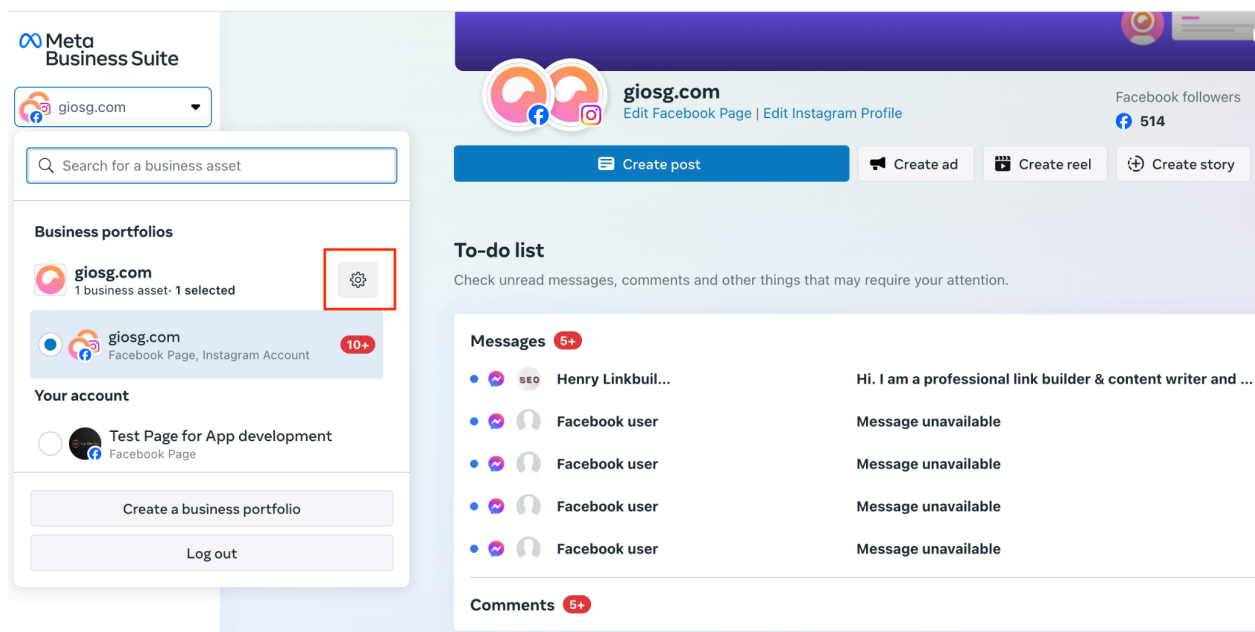
Name	Test version	Test	Subscription version	Subscribe
flows	v13.0	Test	v13.0	<input type="checkbox"/>
message_echoes	v13.0	Test	v13.0	<input type="checkbox"/>
message_template_quality_update	v13.0	Test	v13.0	<input type="checkbox"/>
message_template_status_update	v13.0	Test	v13.0	<input type="checkbox"/>
messages	v13.0	Test	v13.0	<input checked="" type="checkbox"/>
messaging_handovers	v13.0	Test	v13.0	<input type="checkbox"/>
phone_number_name_update	v13.0	Test	v13.0	<input type="checkbox"/>
phone_number_quality_update	v13.0	Test	v13.0	<input type="checkbox"/>
security	v13.0	Test	v13.0	<input type="checkbox"/>
template_category_update	v13.0	Test	v13.0	<input type="checkbox"/>

Done

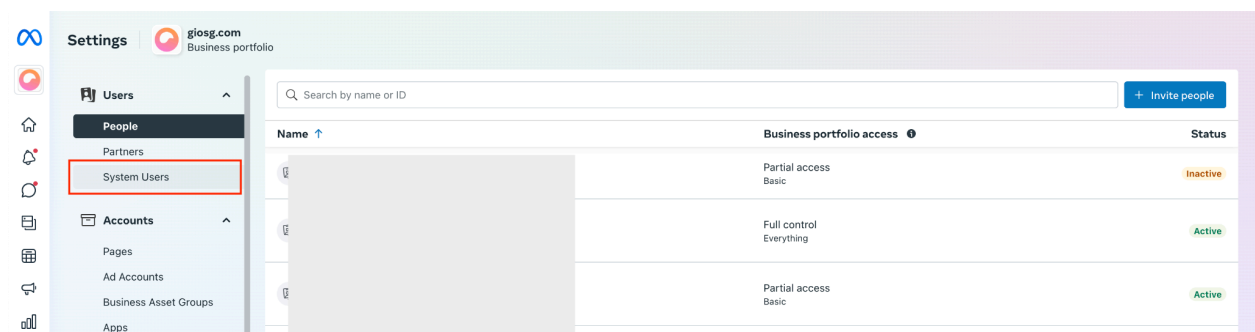
5. Create a permanent Meta app token for sending messages from giosg Workflow Builder

To be able to send messages from the Giosg platform back to Whatsapp we will need a Meta authorization token.

5.1 Go to the Meta Business Suite frontpage at <https://business.facebook.com/> and click the Settings icon on the top left corner of the page, where you can see your business accounts.

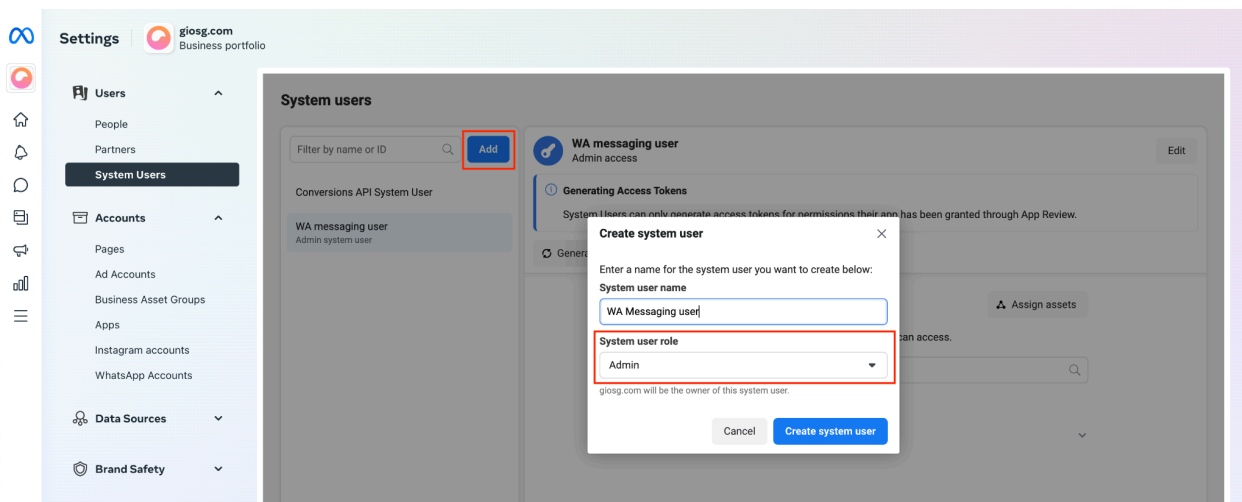


5.2 On the settings page, click the “System users” link on the left menu.

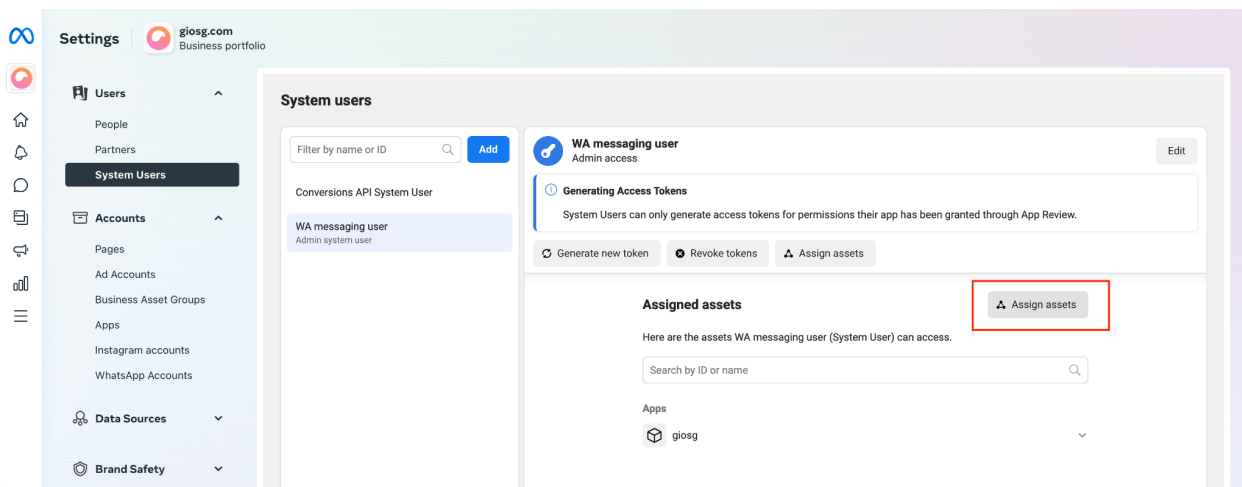


5.3 Next, either create a new system user or assign a new token for an existing system user. In this documentation we create a new user by using the “Add” button. Give a descriptive name for the user and make sure the role is “Admin”.

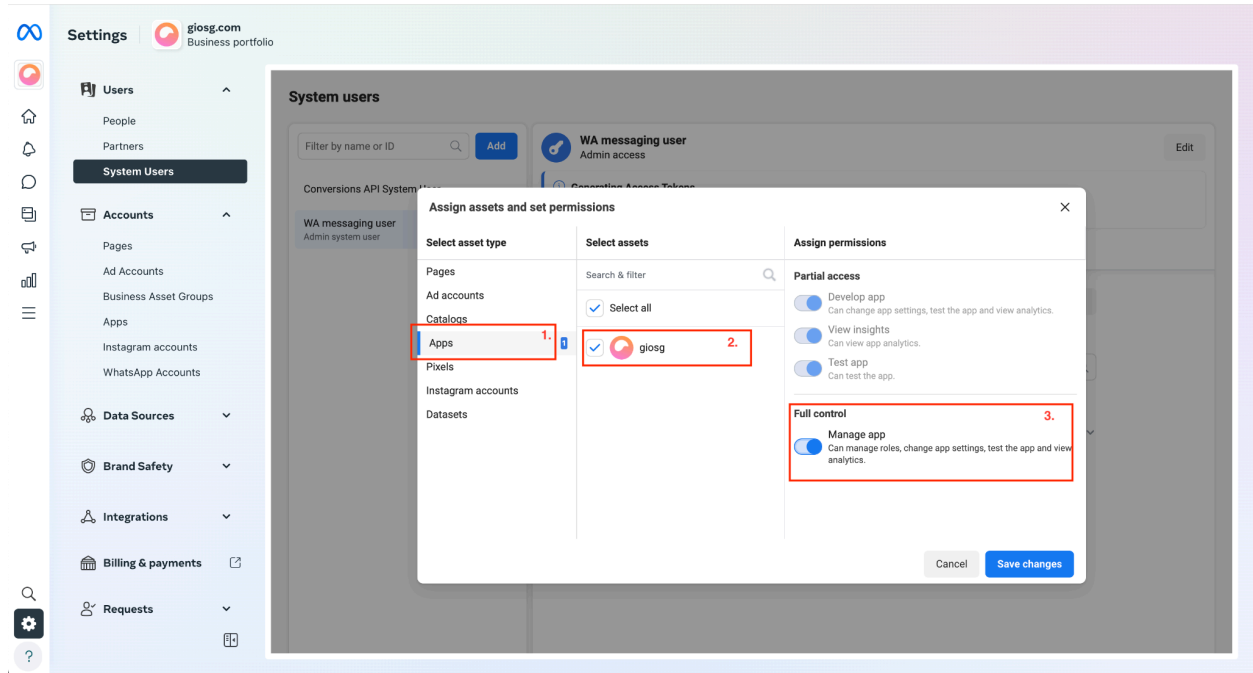
Important!: You need to have enough permissions to be able to create the user. Also you need to have Two-Factor authentication enabled for your Facebook/Meta account or you won't be able to create the user. You will receive an error message “You have been temporarily blocked from performing this action” in that case.



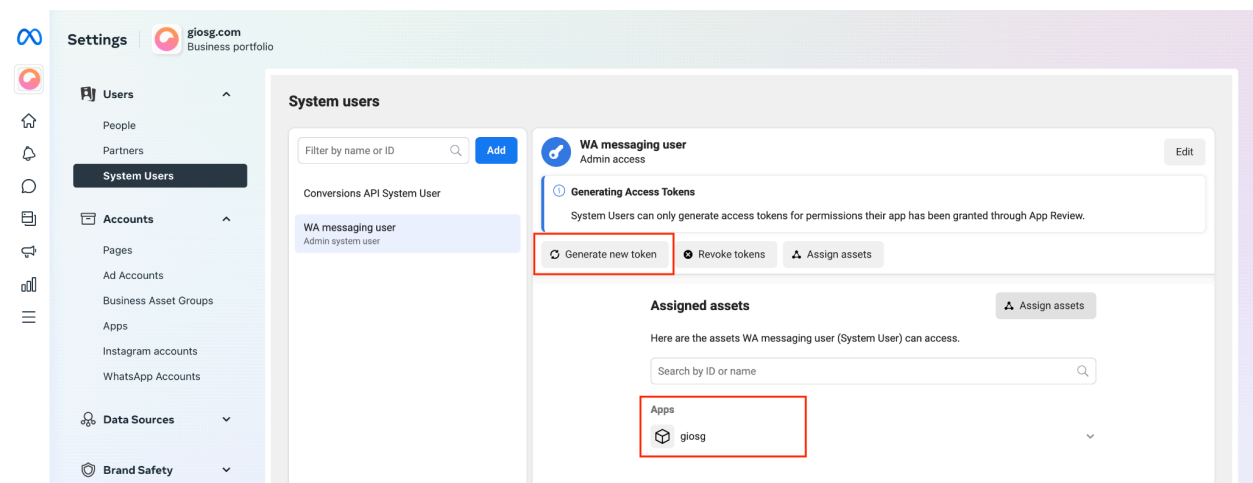
5.4 After you have created the system user, you need to assign access to the app or this user. Click the “Assign assets” button.



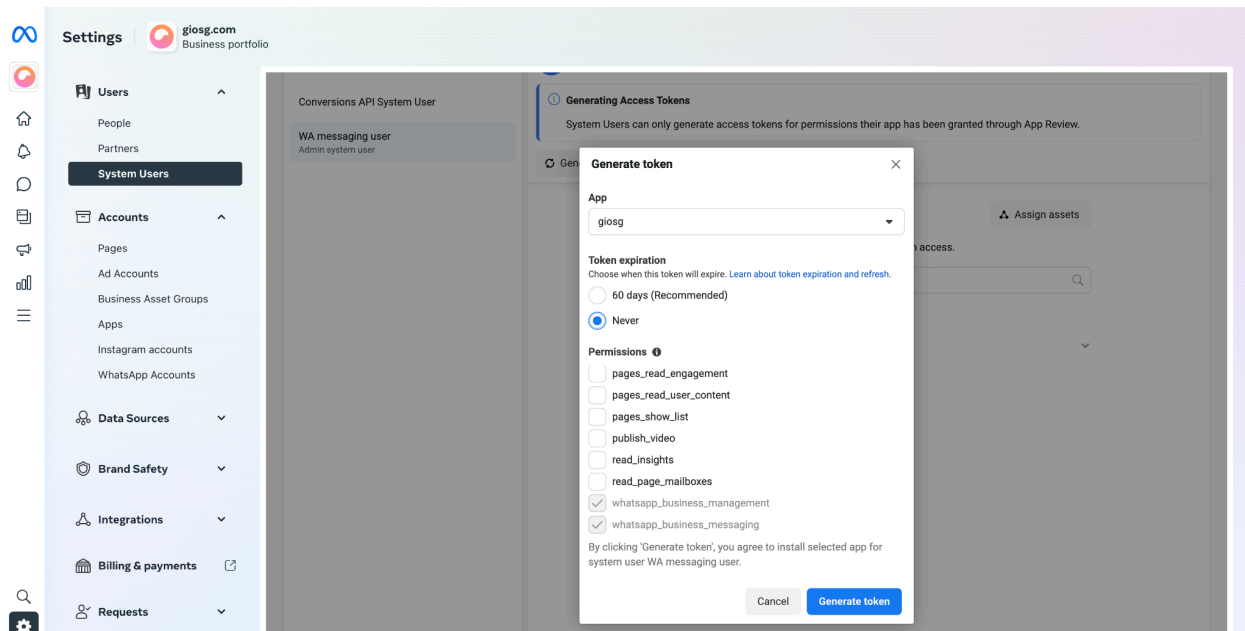
5.5 In the opened modal, click “Apps”, select your app and then assign “Manage app” permission to the user.



5.6 Click “Generate new token”. Note that the app needs to be assigned to this user before this step or the token won't work.



5.7 In the opened modal window, select your new app and choose “Never” for the token expiration. Under permissions select at least “whatsapp_business_management” and “whatsapp_business_messaging”.

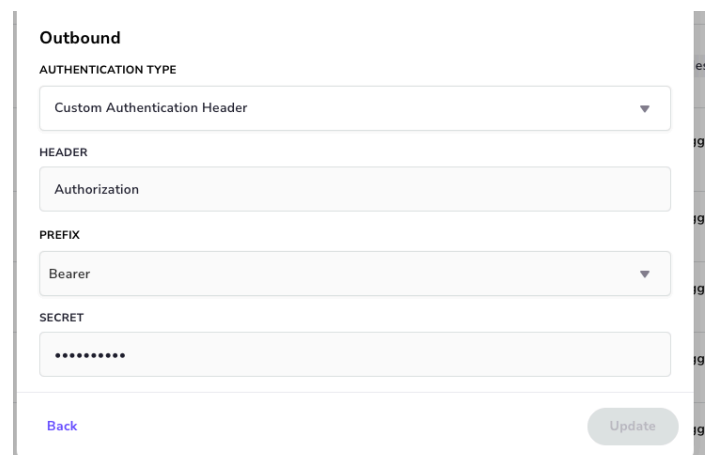


5.8 Click the “Generate token” button and copy the generated token.

Important!: Note that you cannot recover the token anymore after generating, so keep it safe.

5.9 Navigate to the giosg accounts page where you retrieved the Callback URL and Verification token earlier: <https://workflowbuilder.giosg.com/accounts> and select the “WhatsApp” account.

Configure the Outbound section of the account as in the image below. Paste your generated Meta app token in the “secret” field. (Note that another admin might need to approve the request)



6. Provide information to giosg

After this point giosg will finalize the integration. Please provide the **Phone number** as well as **Phone number ID** and **WhatsApp Business Account ID** to giosg. Both can be found from the WhatsApp API Setup page:

