

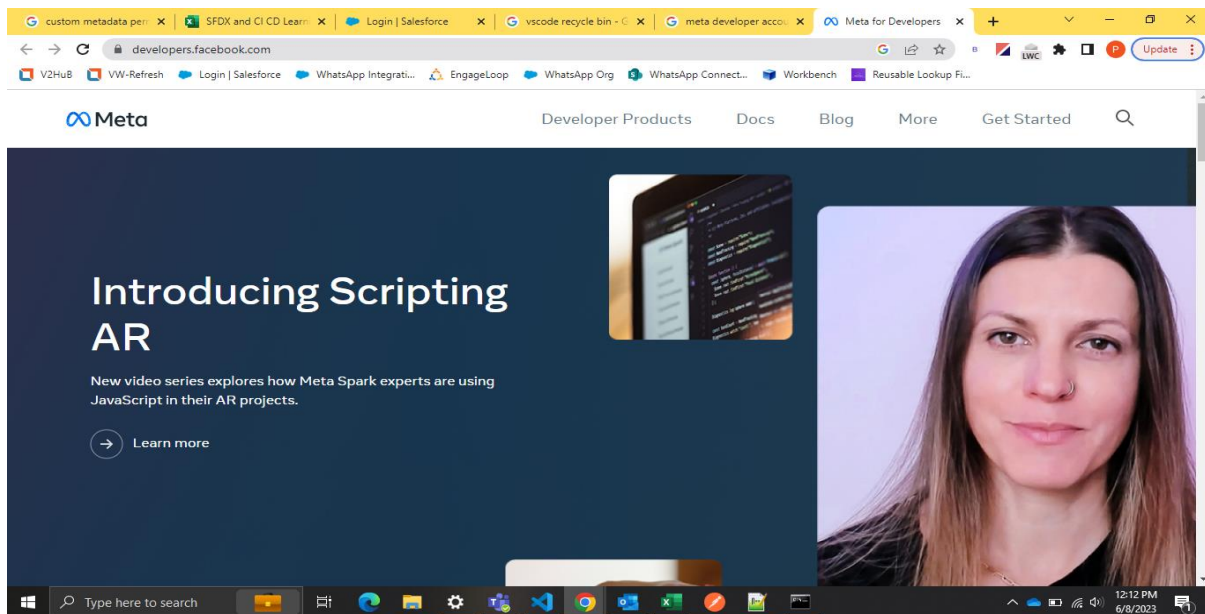
WhatsApp Integration

Admin Guide

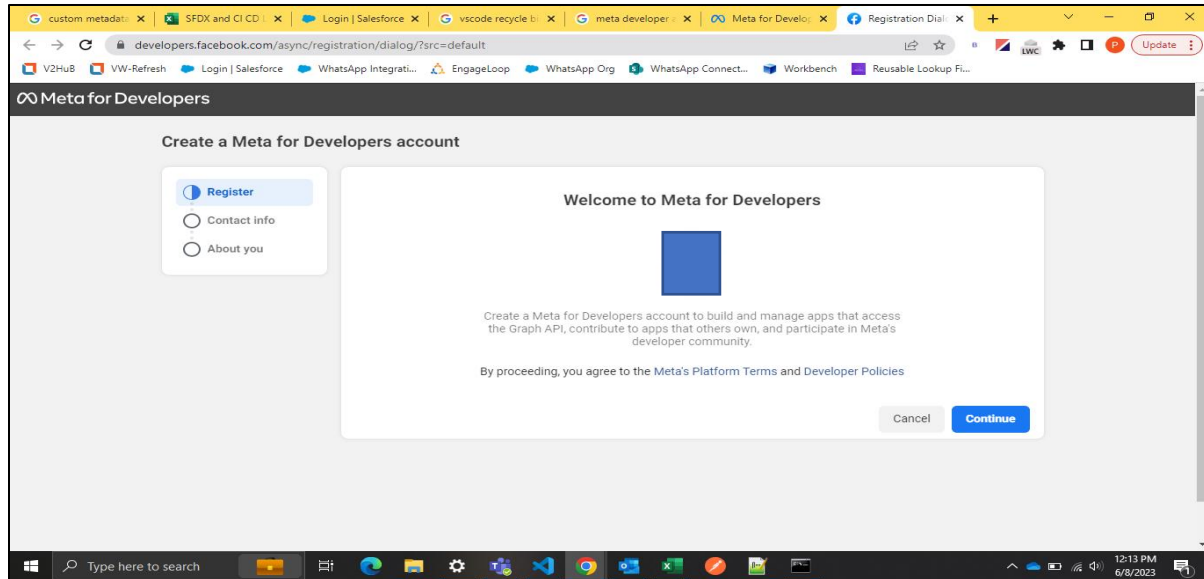
Prerequisite for the app

Admin should have a developer account. If it already exists, skip the to step 7, else you can create one with the following link. If you don't have an account, you can create one by clicking 'Log In' at top right on the screen and then click 'Create new account' on the next screen.

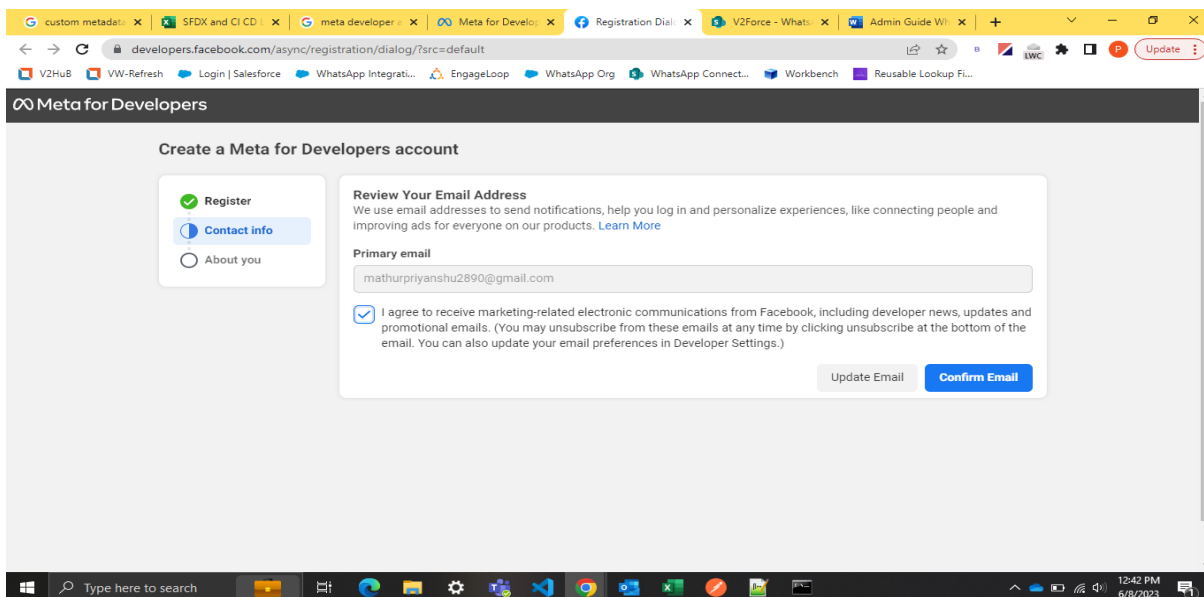
1. Create developer account from <https://developers.facebook.com/>



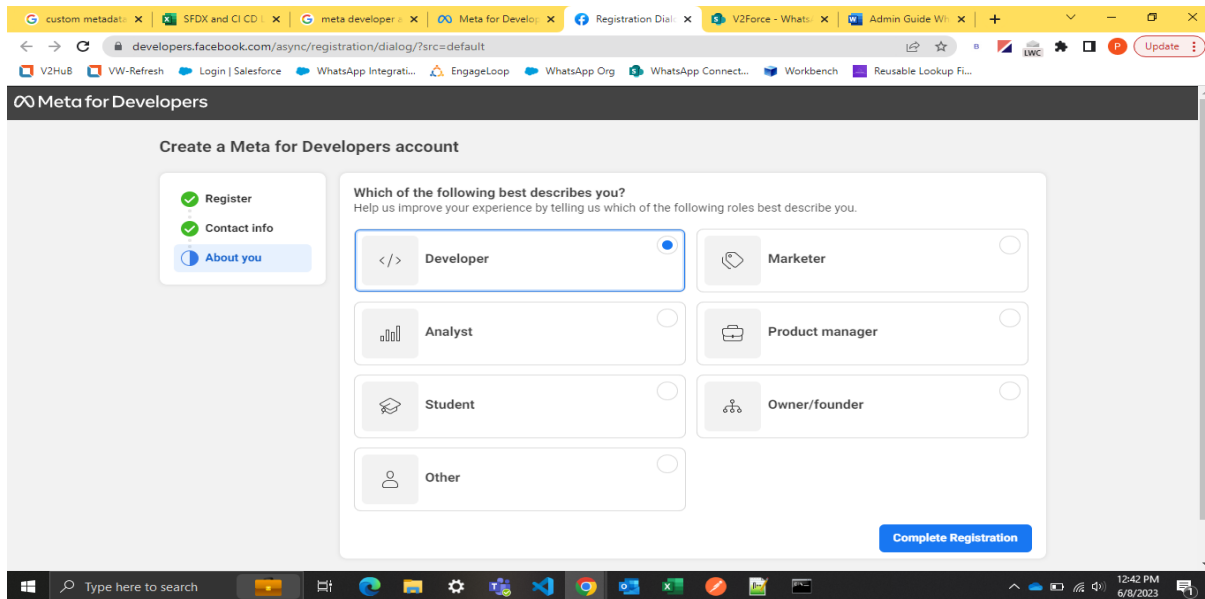
2. Click on 'Get Started' in the above window.



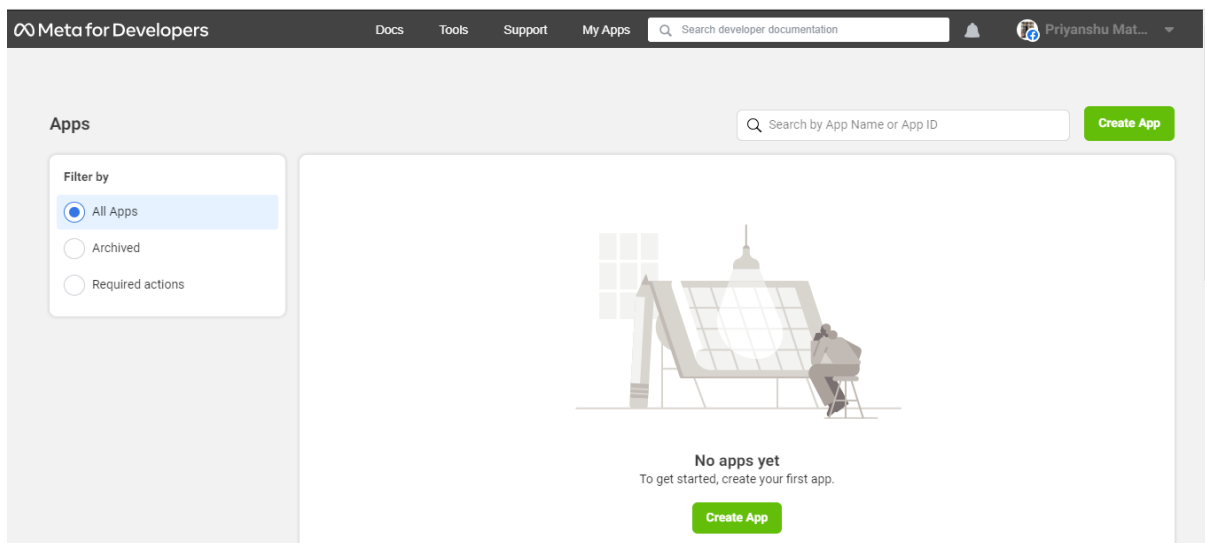
3. Click on 'Continue' in the above screen.



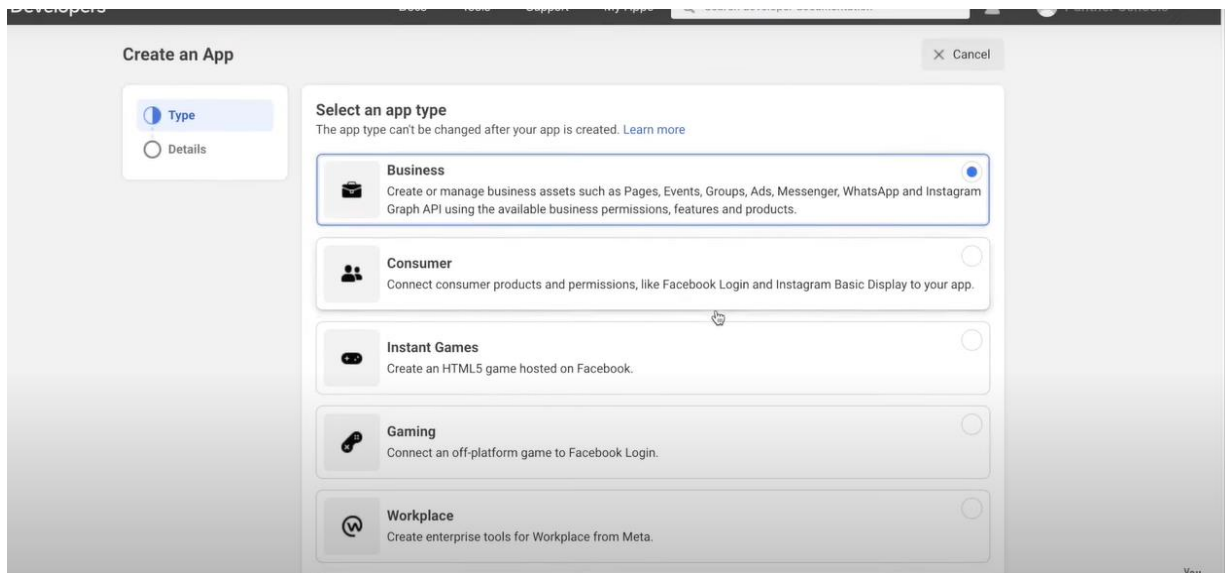
4. Enter your email address if required and check the checkbox below and click on 'Confirm Email' button.



5. Select the 'Developer' option and click on 'Complete Registration' button.
6. After creating the account, admin needs to perform the following steps.
7. Click on 'My Apps' in the above screen.
8. Click on create app.

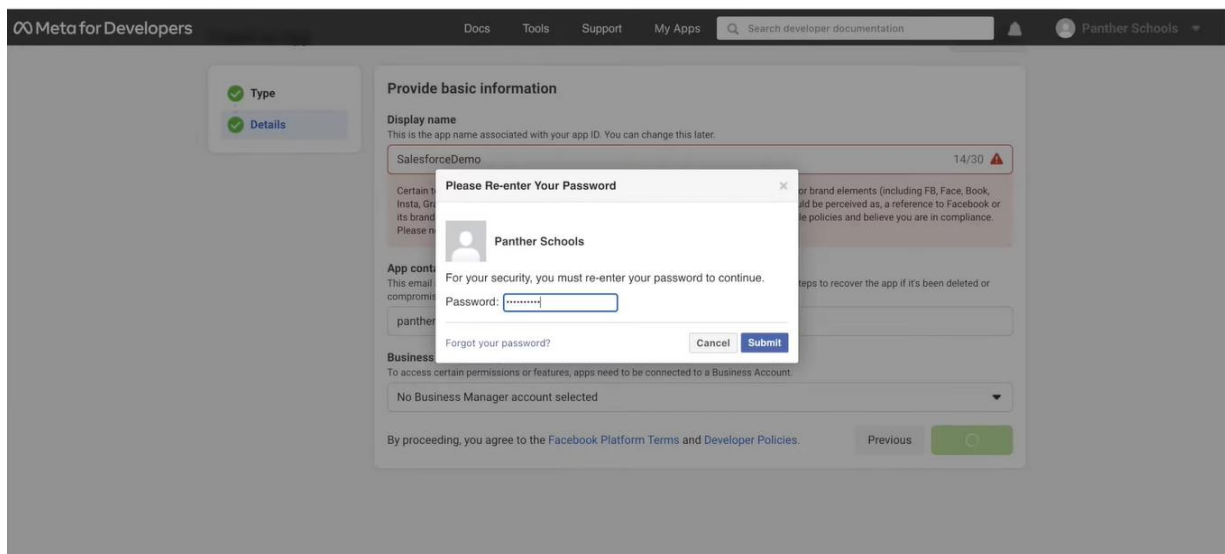


9. Select business account and click on next.



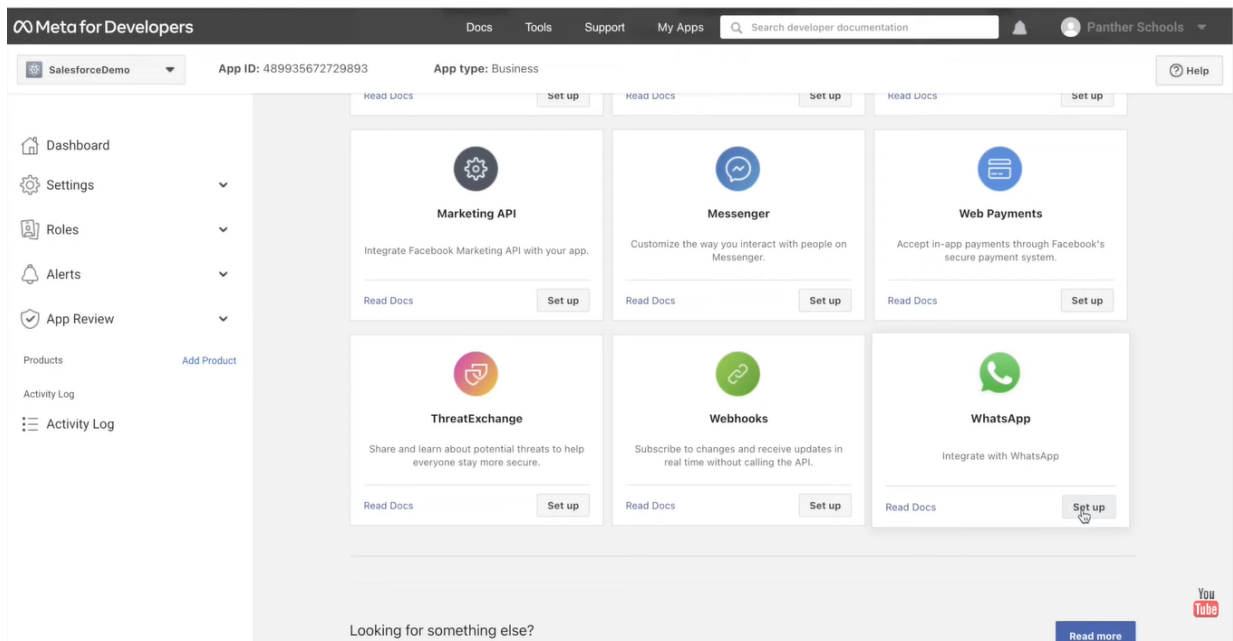
10. Give the name of your app and click on create app.

11. Enter your developer account password.

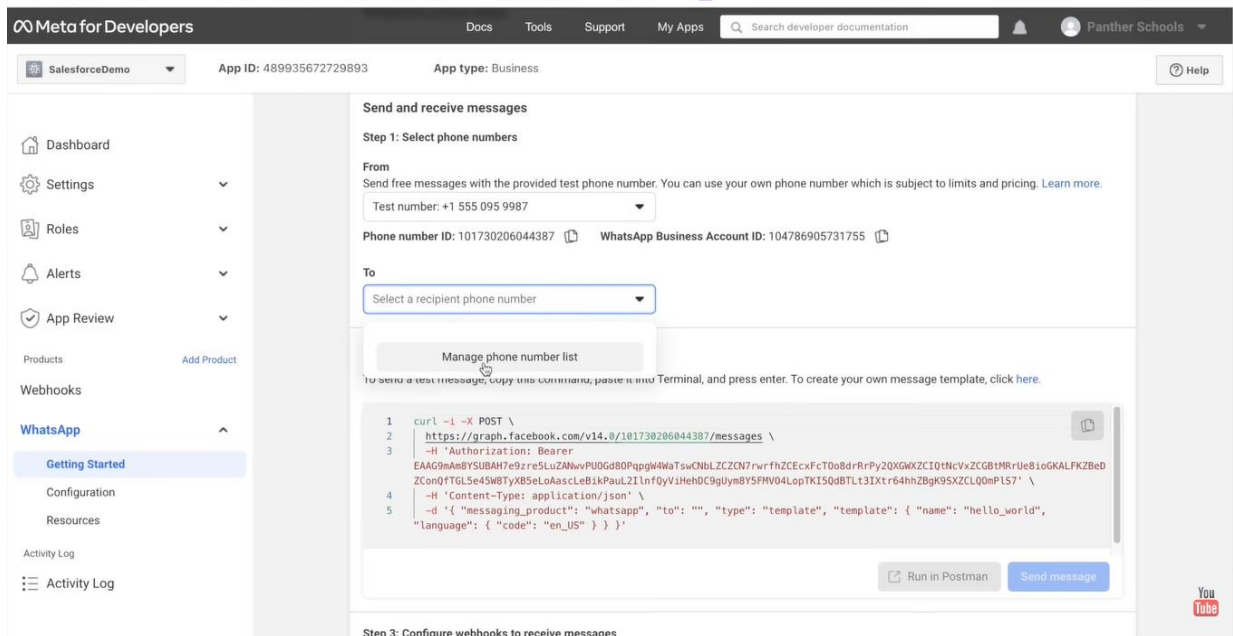


12. You will be directed to the application page.

13. From add product, find WhatsApp and click on setup. Click on continue.



14. Add the number to which you want to send the message.

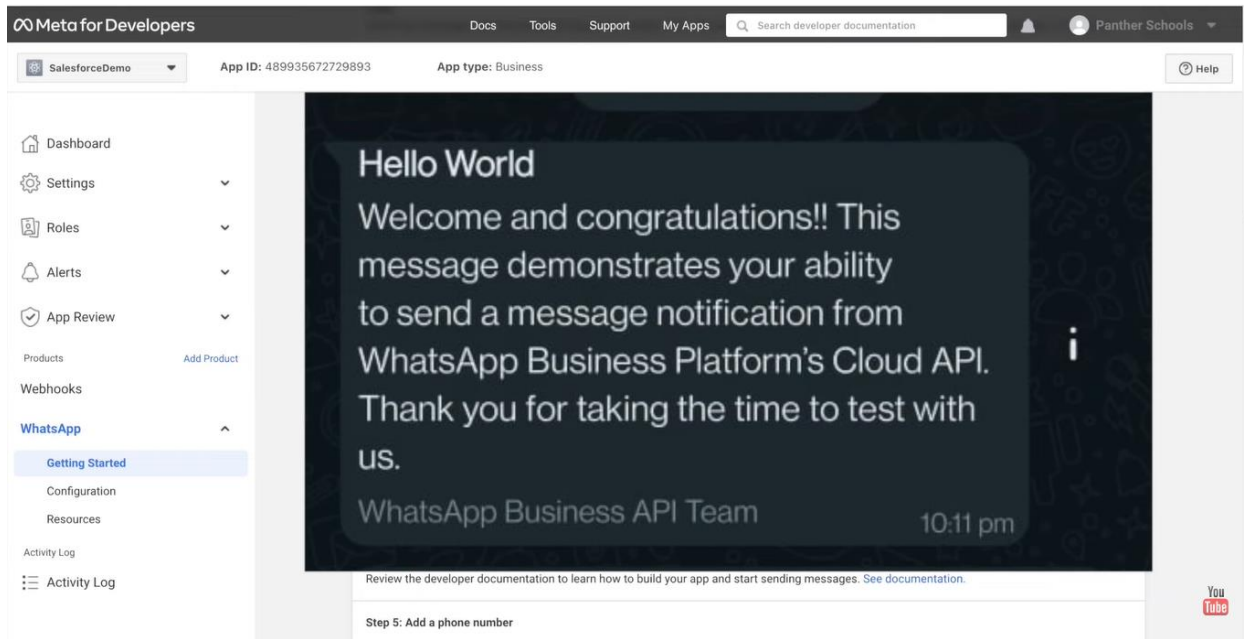


15. Provide the phone number and click on send.

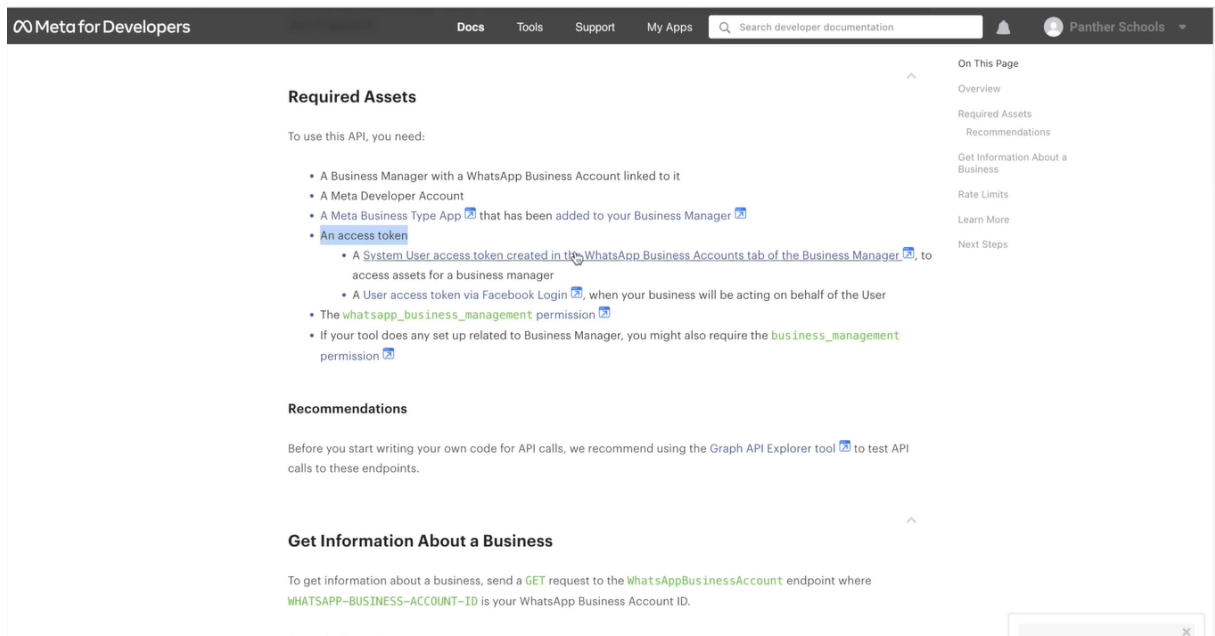
16. Recipient will receive a verification code, enter it.

17. Click on the send message button.

18. You will receive a message like this.



19. Reply with any message to the same number to enable sending and receiving message from WhatsApp.
20. To generate Permanent Access Token, click on configuration under WhatsApp
21. Click on the link about how to create permanent access token.
22. You will be redirected to the document page of Facebook developer.
23. Click on the access token link.



24. Go to the business setting and select a business account.

Add system users to your Business Manager

Steps to add a new system user:

1. [Go to Business Settings](#).
2. Below **Users**, click **System Users**.
3. Click **Add New System User**.
4. Give a name to the system user and click **Create System User**.
5. Assign assets such as your Pages, ad accounts and catalogs.
6. Click **Generate New Token**.
7. Select your app and your permissions, then click **Generate Token**.
8. Copy and save your token.

Remember, you can only share a token once. Each new system user requires a new generated token.

Learn more

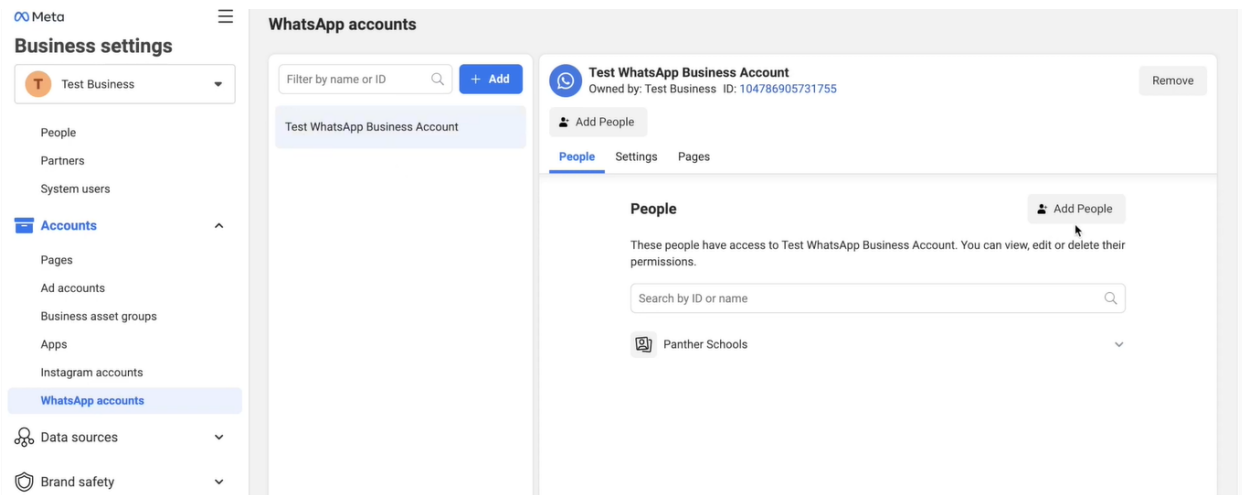
- [About System Users in Business Manager](#)
- [Developer Documentation: System Users for Business Manager](#)

Suggested for you

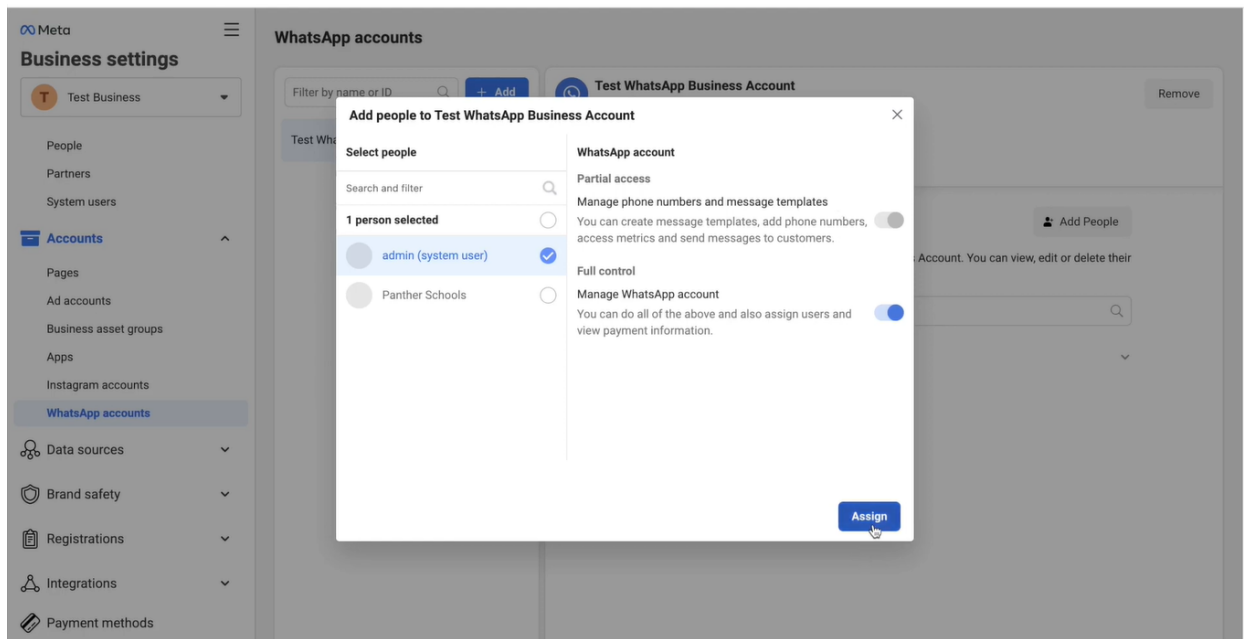
- [Increase traffic to your website](#) →
- [Increase website conversions](#) →
- [Get more messages](#) →
- [Retarget your customers to increase website conversions](#) →

25. Select system user and add an admin system user with role as admin and click create user.

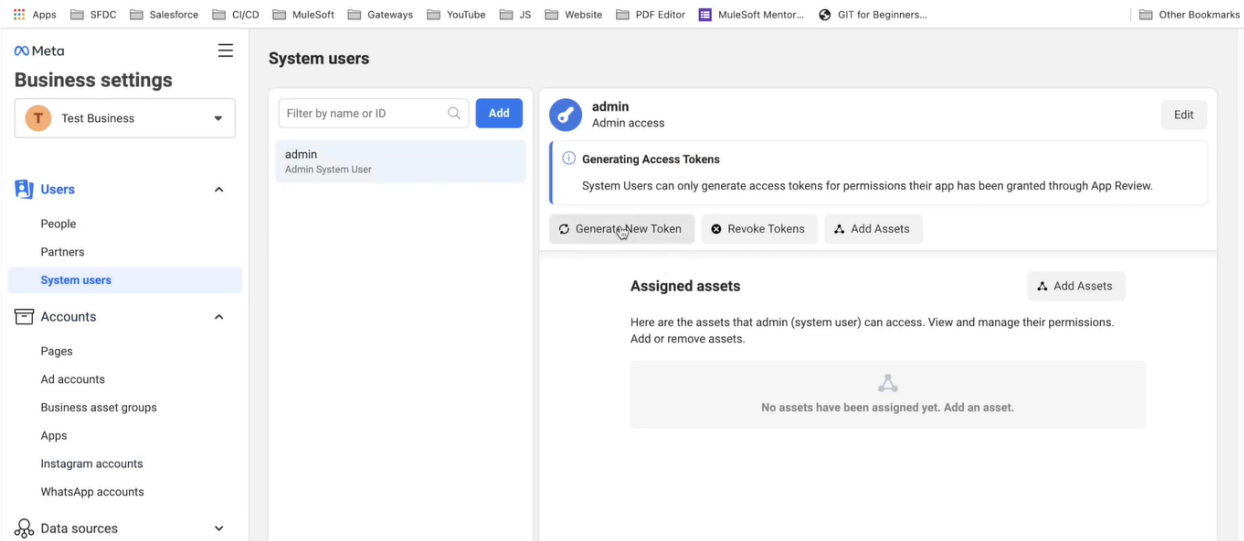
26. Under accounts, go to the WhatsApp accounts.



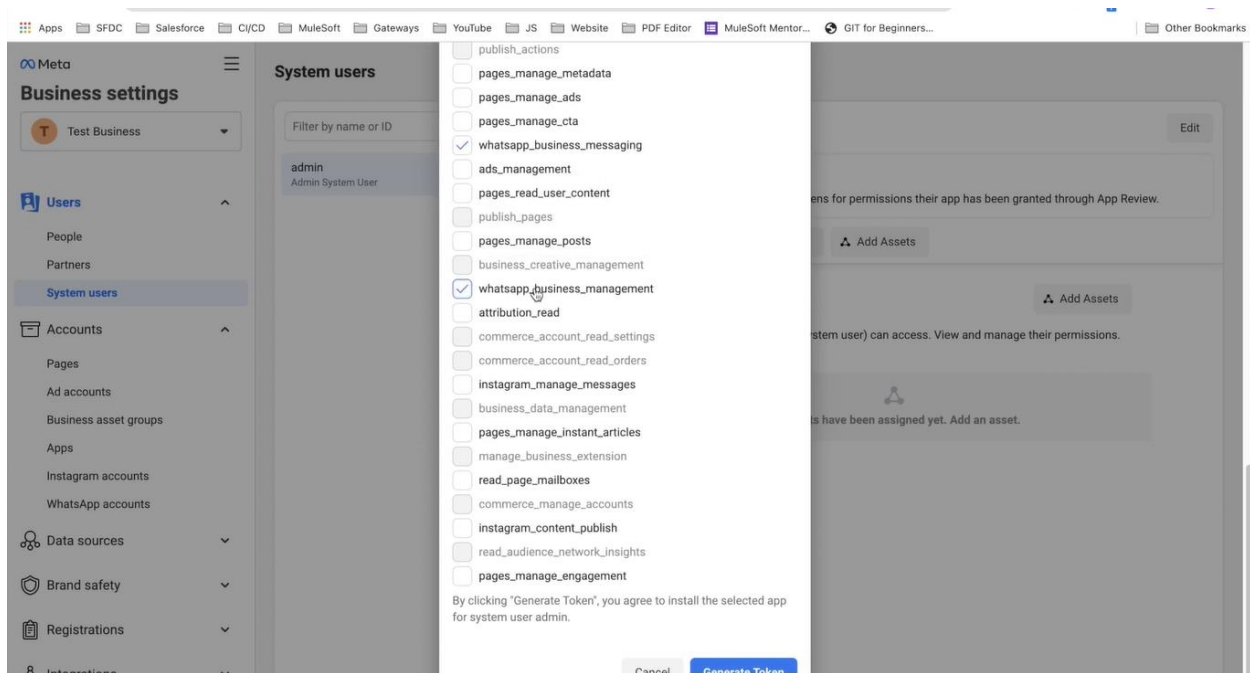
27. Click on add people, select admin user, and give both permission and assign it. Click done.



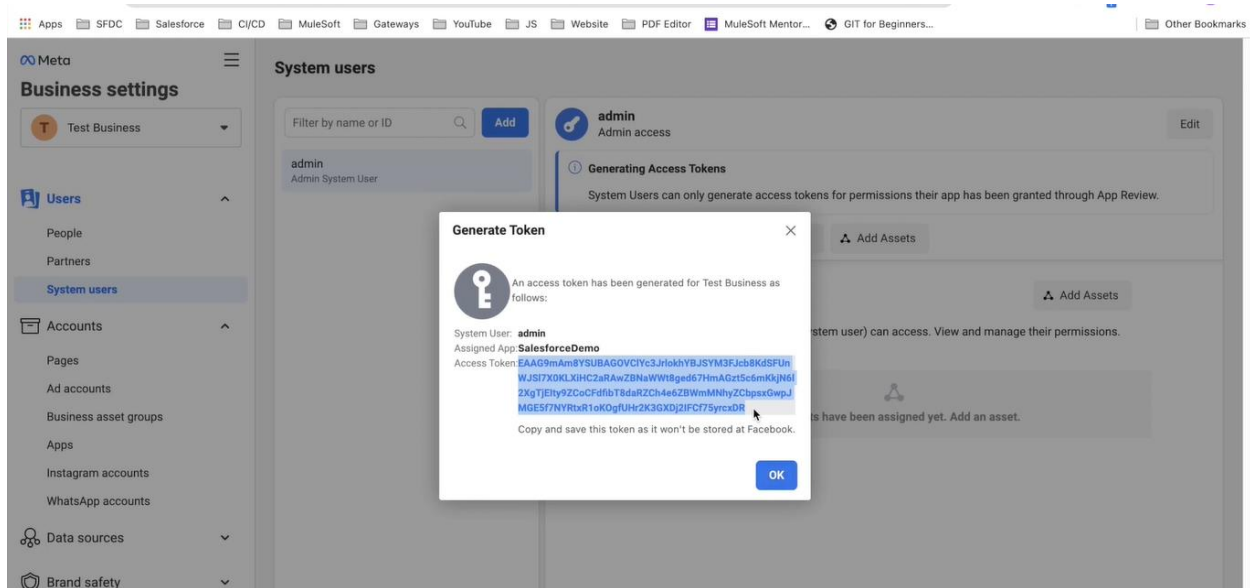
28. Come to system user and select user and click on generate new token.



29. Select the app you created and enable following permission and click on generate token.



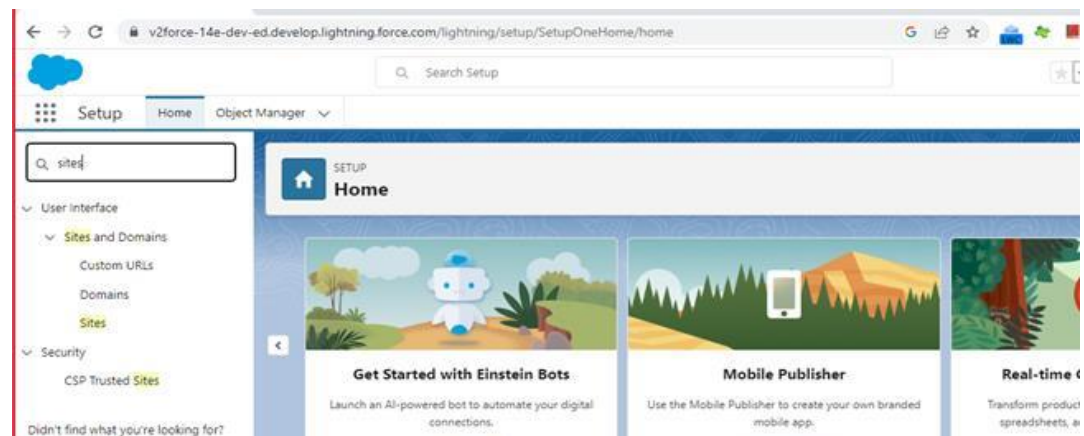
30. Copy the token and click on OK.



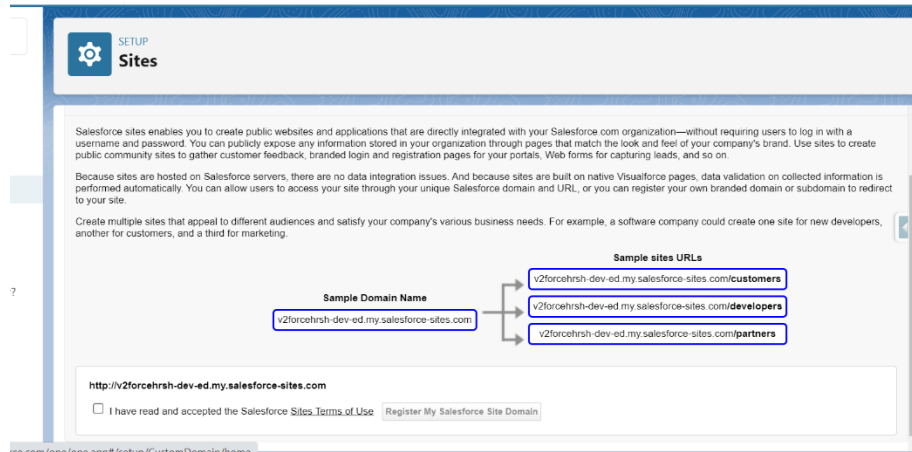
31. Now go to WhatsApp Setting Page and paste the token in WhatsApp Access Token.
32. Go to Meta App Settings and from there copy WhatsApp Business Account ID and WhatsApp secret and paste it in the WhatsApp Setting Page.
33. Click on the save button to save the settings.

34. Steps to link Webhook

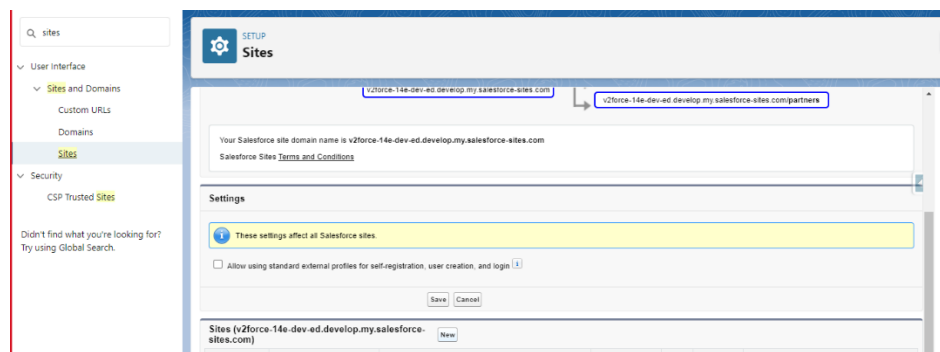
- a. Go to setup of your org and type 'sites' in Quick Find Box.



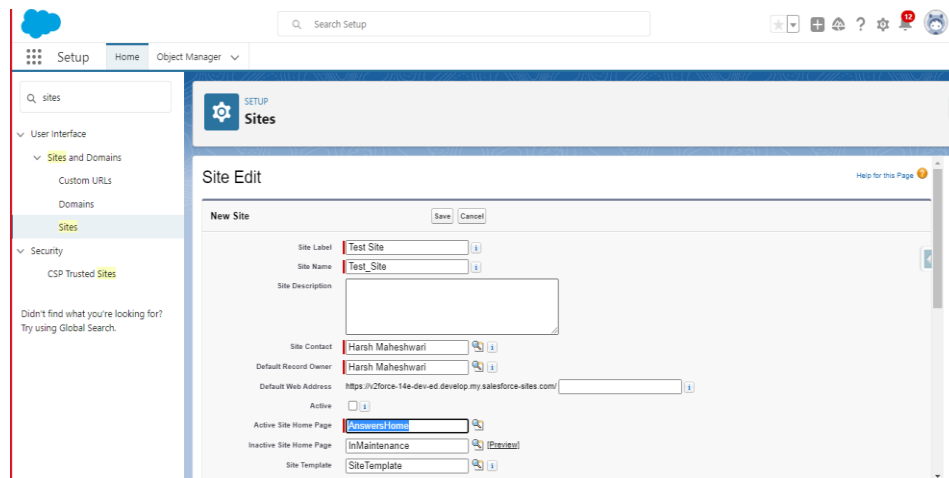
- b. Enable the Salesforce Site Domain Checkbox.



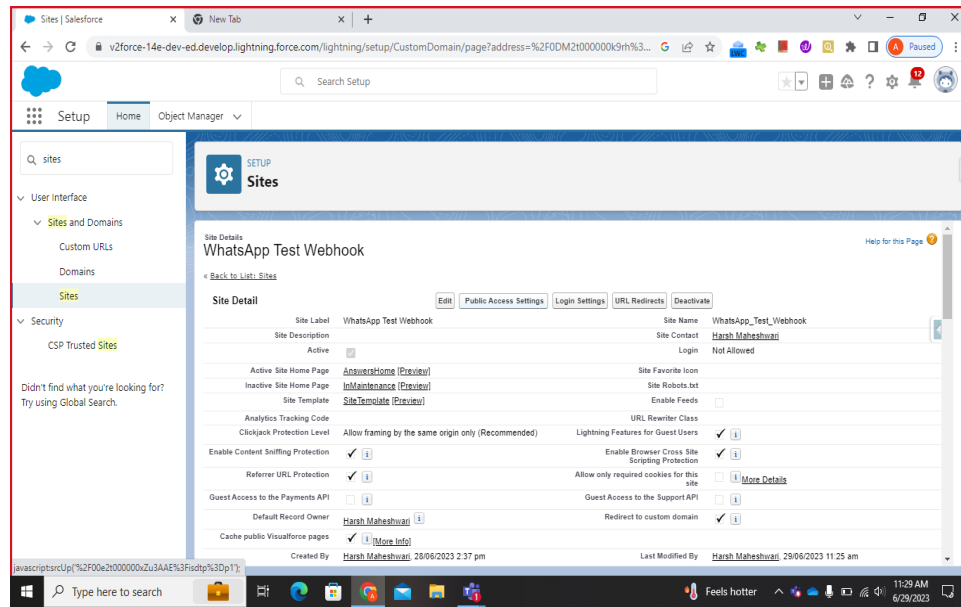
c. Click on new button.



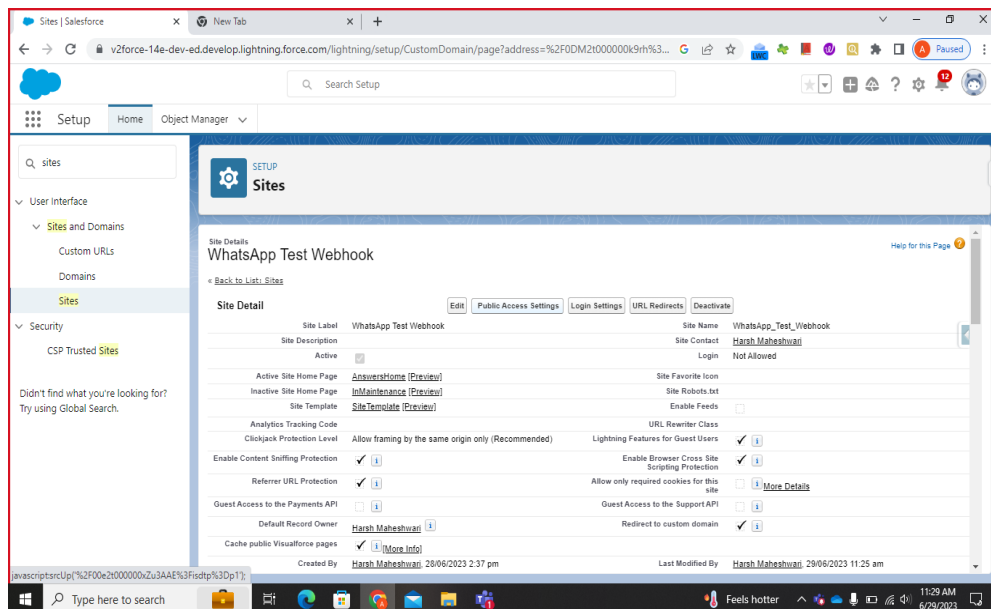
d. Fill All the Details and Select AnswersHome in Active Site Home Page



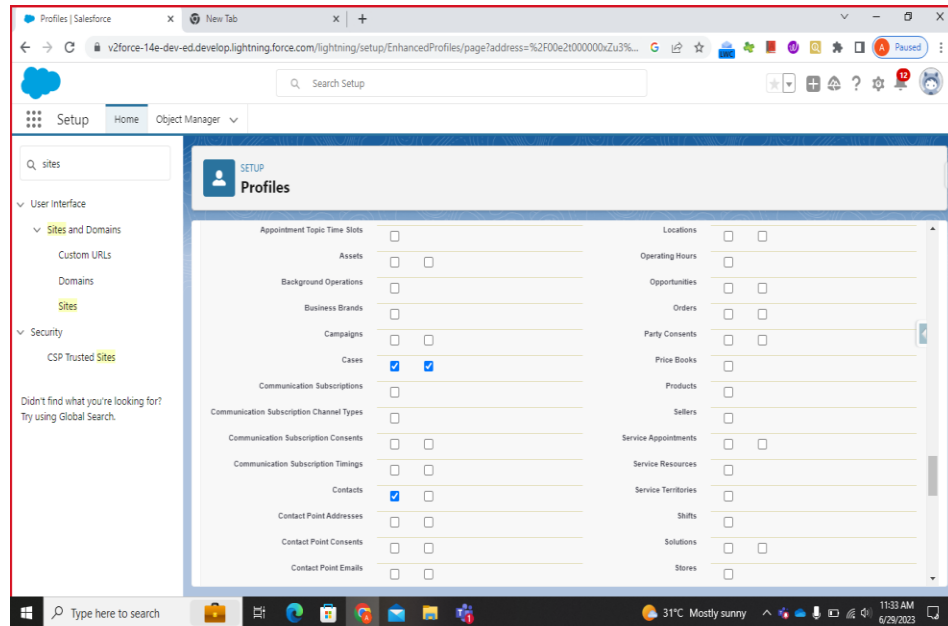
e. After save you will get the page like this-



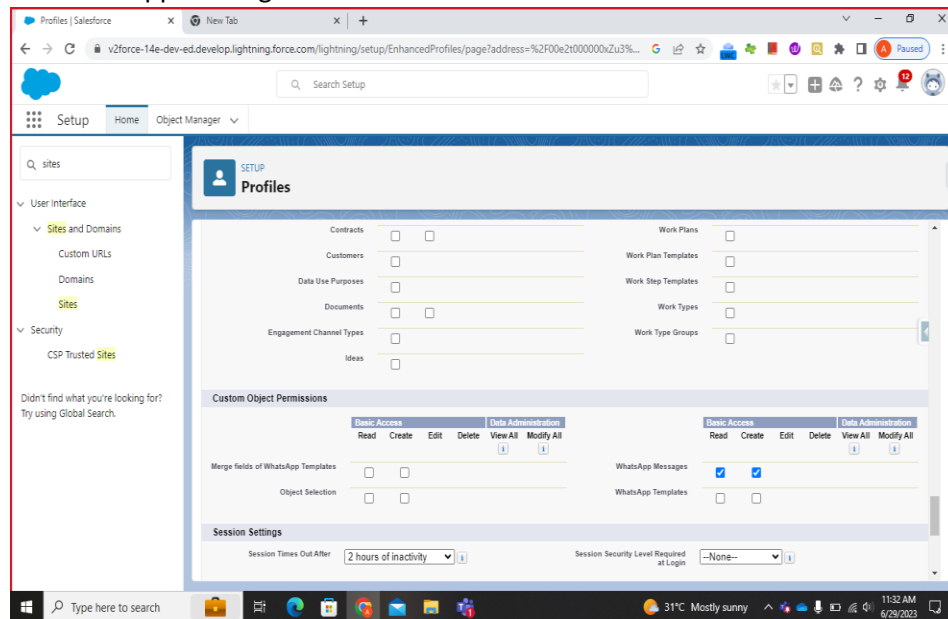
- f. Click Public Access Settings
- g. Go to the view users button.
- h. Click on the Site Guest User
- i. Go to Permission Set Assignment.
- j. Give Guest Site User Permission.
- k. Save it.
- l. Click Edit



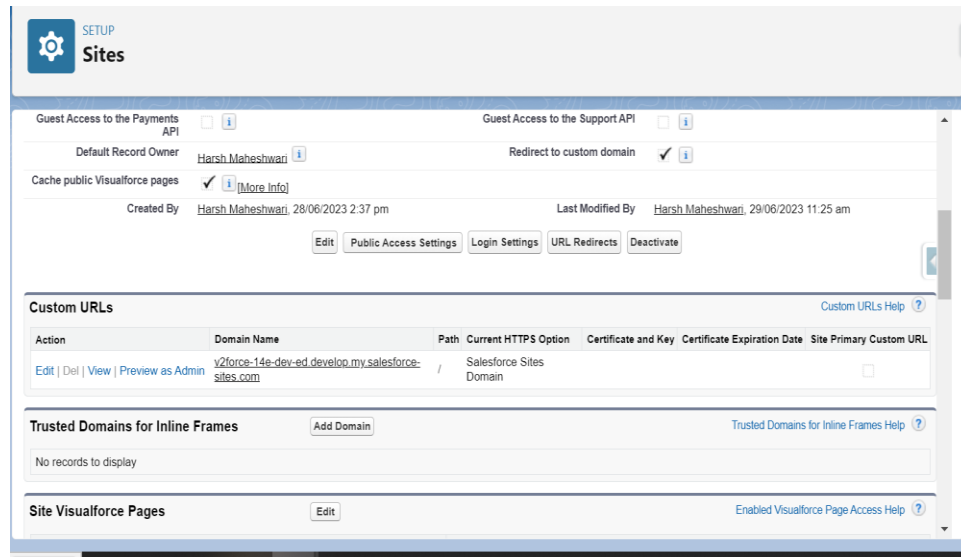
- m. Scroll down to Standard Object Permission and there Enable the checkbox of Read for Contacts and Read and Create for Cases.
- n. Also enable read and edit permission for ContactId , Description, Subject, SuppliedPhone of Case Field and phone field of Contact object.



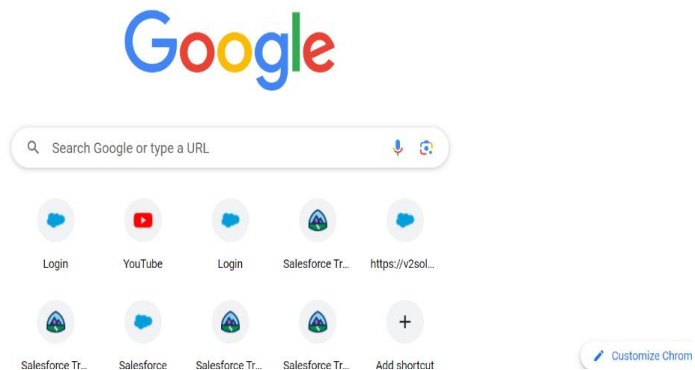
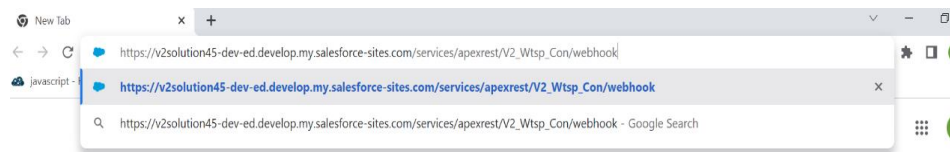
- o. Scroll down to Custom Object Permission and Enable the checkbox of Read and Create for WhatsApp Messages



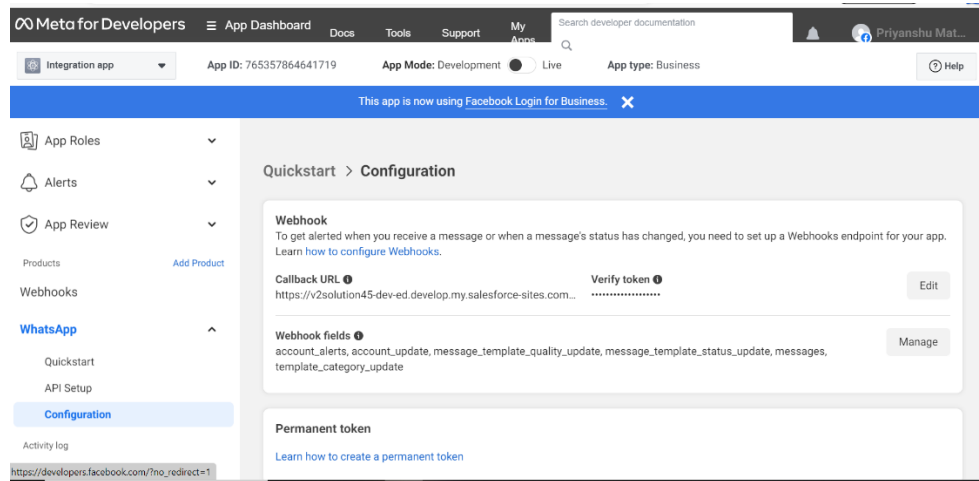
- p. Copy the Domain Name of the Site you created from Custom URLs



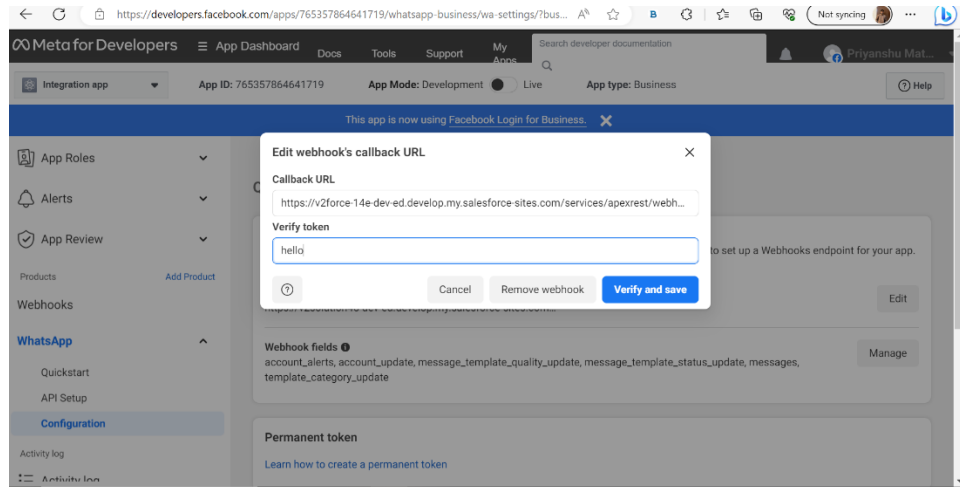
- q. Paste the Domain Name in the New Tab and append it with '/services/apexrest/V2_Wtsp_Con/webhook'. This is an Example Domain Name should be of your org only.



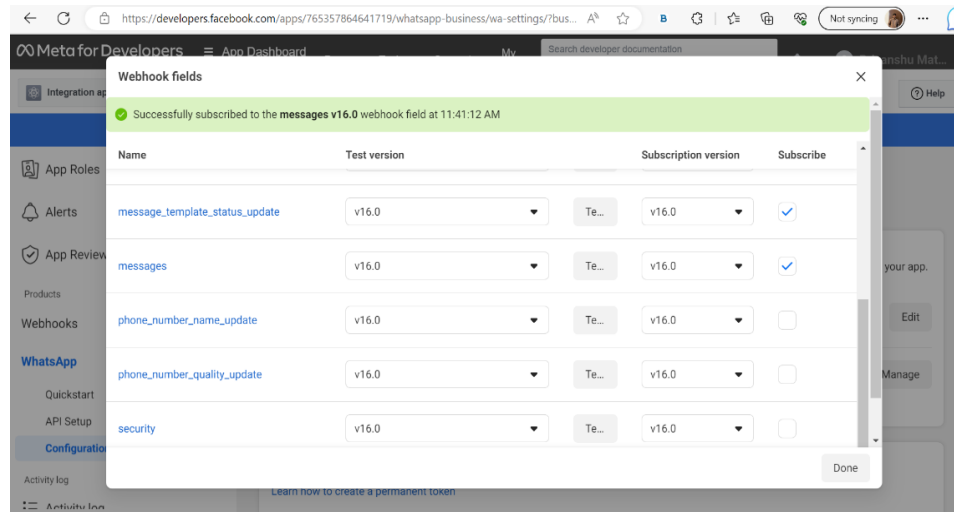
- r. Go to configuration and under webhook click edit.



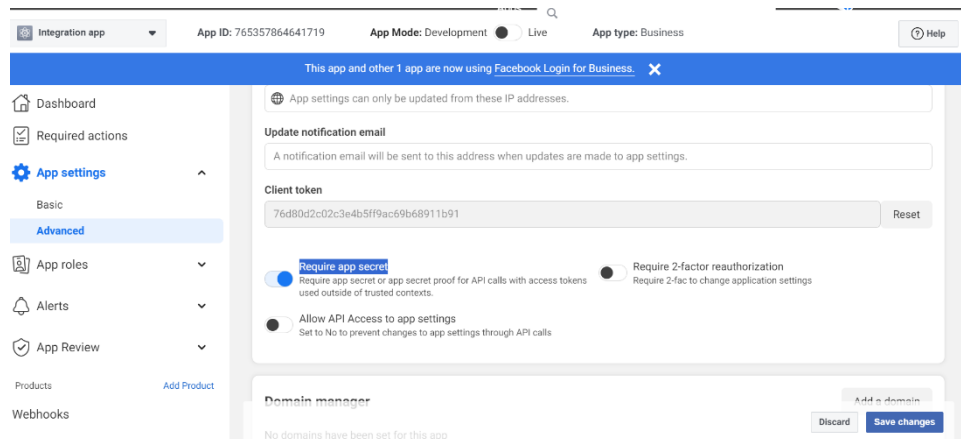
- s. Place the URL which created and the verify token which will be used in connector setting.



- t. Open Webhook field and subscribe to messages.



- u. Your webhook is connected to the salesforce.
- v. After this go to App Settings and then Select Advanced.
- w. Enable Require App Secret Toggle button.



- x. Click on Save Changes.

V2WhatsApp Setting Page

1. Steps for Basic Settings
 - a. Enter WhatsApp Business Account ID
 - b. Enter Verify Token
 - c. Enter Version of WhatsApp Business Account

- d. Enter WhatsApp Secret
- e. Enter WhatsApp Access Token
- f. Click on Save Button

The screenshot shows the 'WhatsApp Settings' interface with the 'Basic Settings' tab selected. The settings are as follows:

Field	Value
WhatsApp Business Account ID	116982851316889
Verify Token	hello
Version of WhatsApp Business Account	v15.0
WhatsApp Secret	7d4acec0f718a817b212e4fab50e29b
WhatsApp Access Token	EAAK4FsOI5LcBAM6G45b8Wpy6EasLOvENMiEYChcDU1N

Buttons: Cancel, Save

2. Steps for Template Settings

- a. Enable Fetch WhatsApp Message Templates Button for getting templates of WhatsApp.
- b. Select the default category value for creating the template.
- c. Select the default language value for creating the template.
- d. Enable Delete Rejected Templates Button to delete message templates which have been rejected.
- e. Enter No. Of Days for which Admin wants to store Rejected Template after enabling Delete Rejected Templates Button.

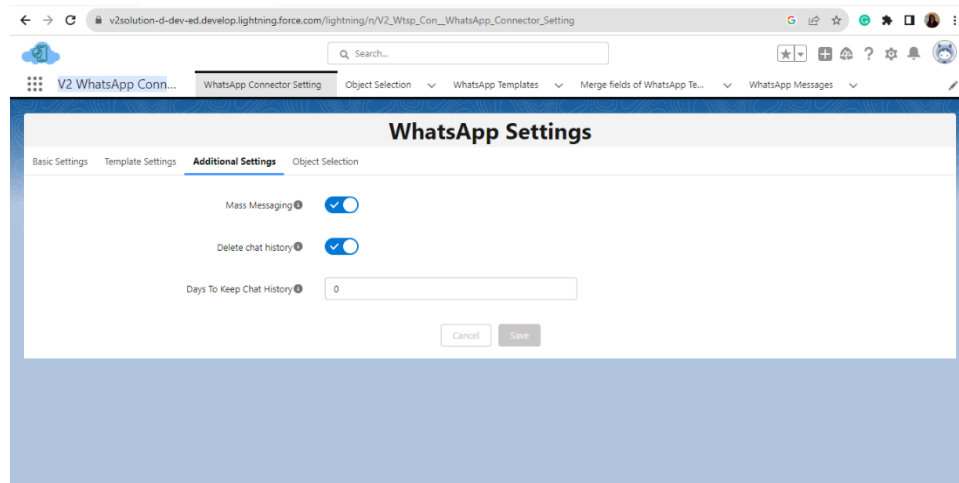
The screenshot shows the 'WhatsApp Settings' interface with the 'Template Settings' tab selected. The settings are as follows:

Field	Value
Fetch Whatsapp Message Templates	☒
Category	MARKETING
Language	English (US)
Delete Rejected Templates	☒
No. Of Days To Store Rejected Template	45

Buttons: Cancel, Save

3. Steps for Additional Settings

- Enable Mass Messaging toggle button to allow user to mass message.
- Enable Delete Chat History button to delete the chats stored in case object.
- Enter Days to Keep Chat History for which Admin wants to store Chat History present in case object.



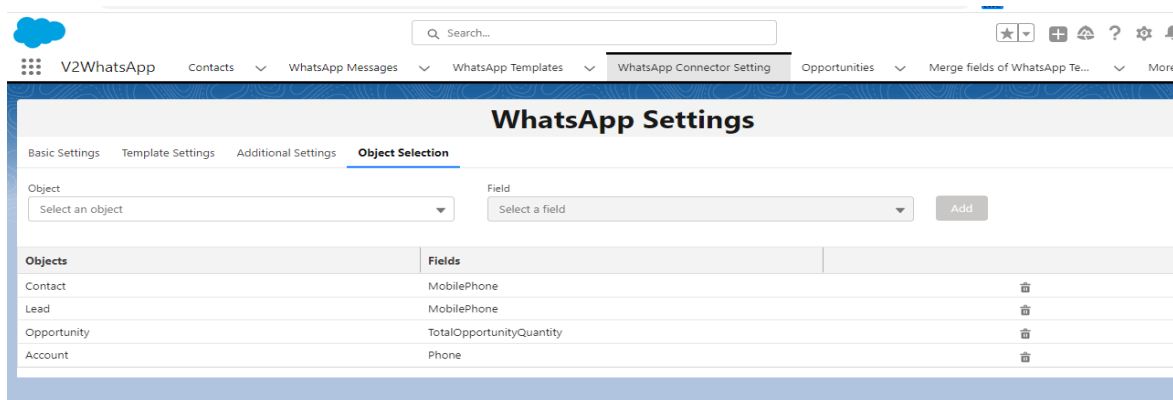
The screenshot shows the 'WhatsApp Settings' interface with the 'Additional Settings' tab selected. The settings are as follows:

Setting	Value
Mass Messaging	Enabled (Toggle On)
Delete chat history	Enabled (Toggle On)
Days To Keep Chat History	0

Buttons: Cancel, Save

4. Steps for Object Selection

- Select the object on which Admin wants to enable the create and send templates functionality.
- Select the field related to the object selected in which admin can store the customer's WhatsApp number.



The screenshot shows the 'WhatsApp Settings' interface with the 'Object Selection' tab selected. The settings are as follows:

Object	Field
Select an object	Select a field

Buttons: Add

Objects	Fields
Contact	MobilePhone
Lead	MobilePhone
Opportunity	TotalOpportunityQuantity
Account	Phone

- c. Click on the add button. The record of the object and its related field will be created in the data table below. These records will be stored in custom metadata.

WhatsApp Settings

Basic Settings | Template Settings | Additional Settings | **Object Selection**

Object: Employee

Field: Select a field

Add

Objects	Fields	
Contact	MobilePhone	
Lead	MobilePhone	
Opportunity	TotalOpportunityQuantity	
Account	Phone	

- d. You can also delete the object record from the data table by clicking on the delete button present corresponding to each record.

WhatsApp Settings

Basic Settings | Template Settings | Additional Settings | **Object Selection**

Object: Employee

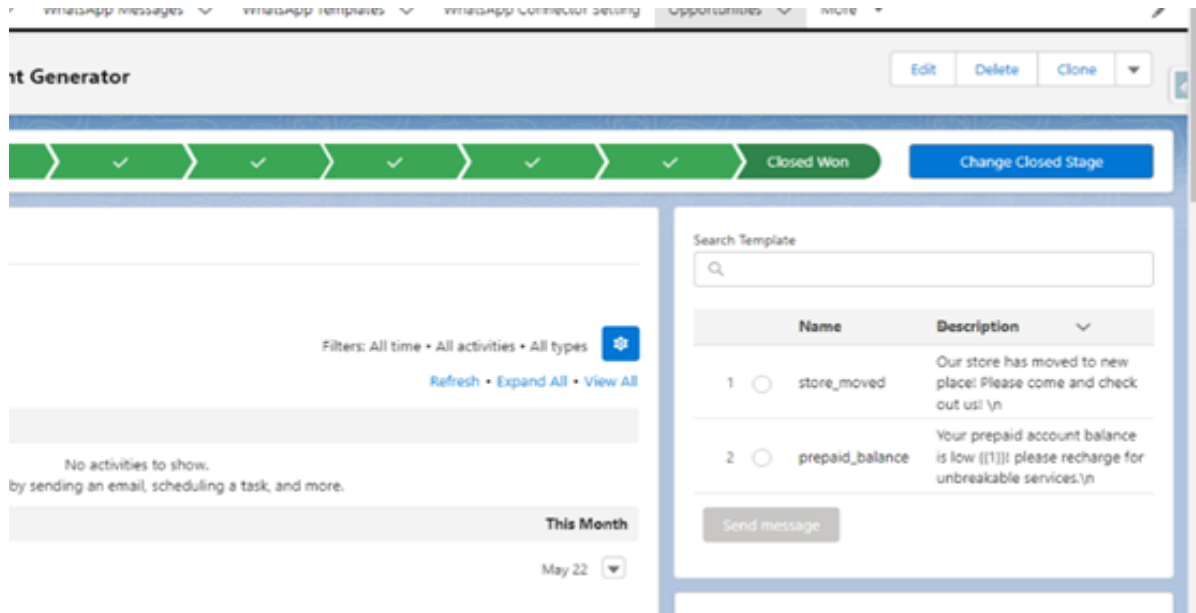
Field: Select a field

Add

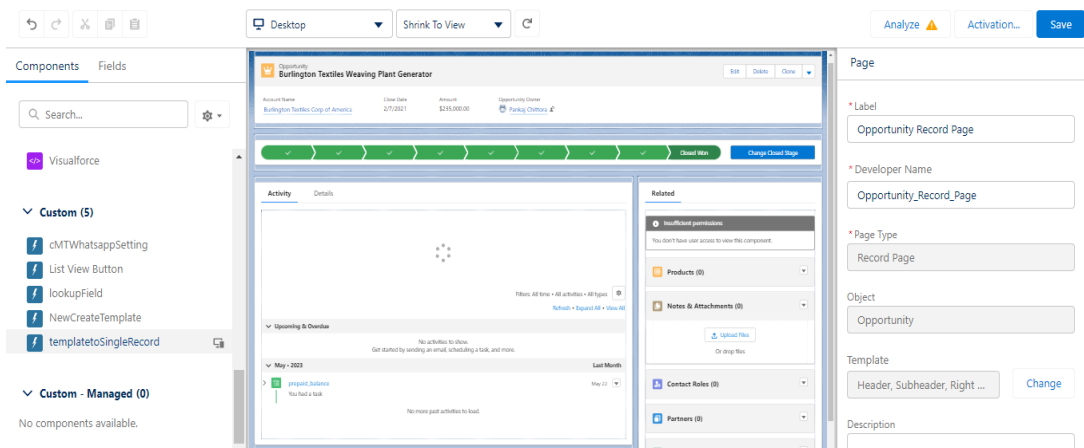
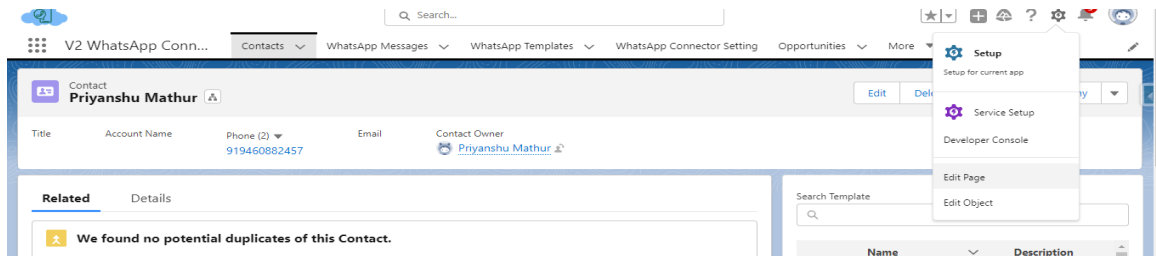
Objects	Fields	
Contact	MobilePhone	
Lead	MobilePhone	
Opportunity	TotalOpportunityQuantity	
Account	Phone	

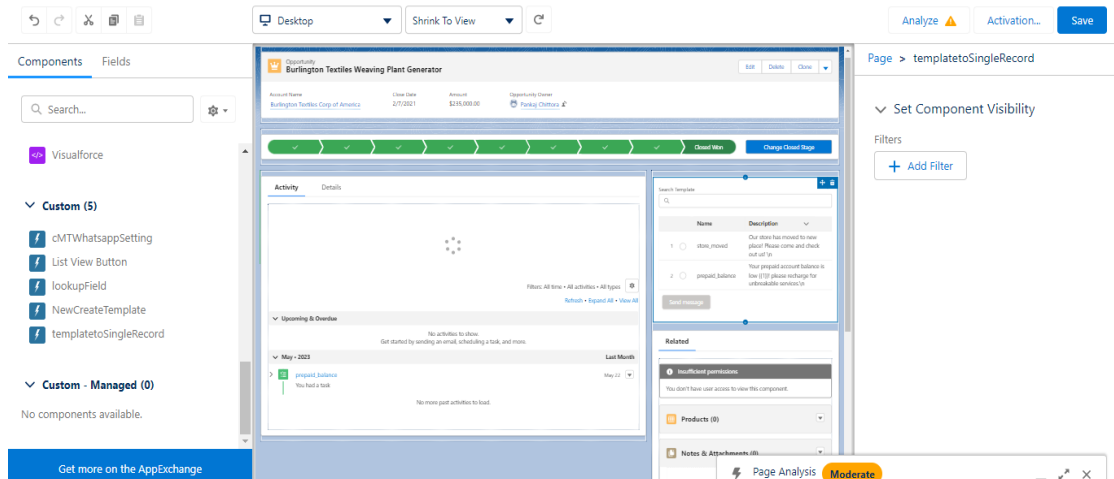
For Sending WhatsApp Messages to a single user

1. To send a message to any record, go to the record and open it. On Its record page send message component will be visible on the right side of the screen.

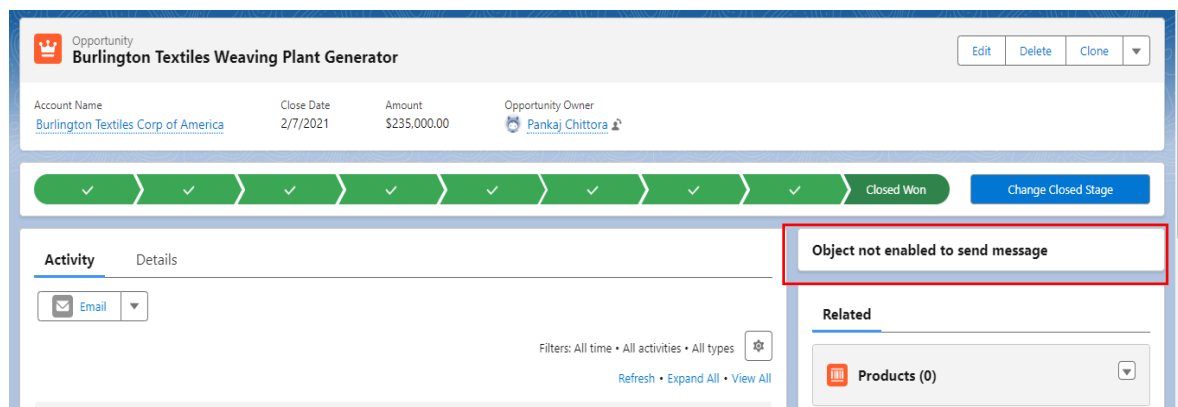


2. If the component is not visible, add this component on the record page of that object.
3. For adding it to the record page, go to setup and select edit page option.





4. If the following appears on the component instead of the templates, enable the object from the 'object selection' tab on the WhatsApp settings page.



Steps to add the 'Send Template' button for sending messages to multiple records: -

1. From setup, go to 'Object Manager' and then select the desired object.
2. Then click on 'Buttons, Links, and Actions' from the list of options on the left and click on 'New Button or Link' on the top right side.

- Details - Fields & Relationships - Page Layouts - Lightning Record Pages Buttons, Links, and Actions - Compact Layouts - Field Sets - Object Limits - Record Types - Related Lookup Filters - Search Layouts	Buttons, Links, and Actions					
	13 Items, Sorted by Label					
	LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
	Add to Campaign	AddInfluence			Standard page	
	Clone	Clone			Standard page	
	Clone with Related	DeepClone			Standard page	
	Delete	Delete			Standard page	
	Delivery Status	DeliveryStatus		Detail Page Link	URL	
	Edit	Edit			Standard page	
	Link a Slack Channel	CreateSalesChannel			Standard page	

3. Fill the details as given below: -

- Label – Send Template
- Name – Send Template (It will auto-populate after entering label)
- Display type – List Button and check the checkbox for ‘Display Check boxes’.
- Behavior – Display in existing window with sidebar
- Content source – URL
- Add ‘/flow/V2_Wtsp_Con__List_View_Button_Flow’ in the below blank as the URL source.
- Click on ‘Save’ button.

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions**
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Custom Button or Link Edit

Label

Send Template

Name

Send_Template

Description

Display Type

☐ Detail Page Link [View example](#)
☐ Detail Page Button [View example](#)
☒ List Button [View example](#)
☒ Display Checkboxes (for Multi-Record Selection)

Behavior

Display in existing window with sidebar

[View Behavior Options](#)

Content Source

URL

Select Field Type

Account

Insert Field

-- Insert Merge Field --

Insert Operator

Functions

-- All Function Categories --

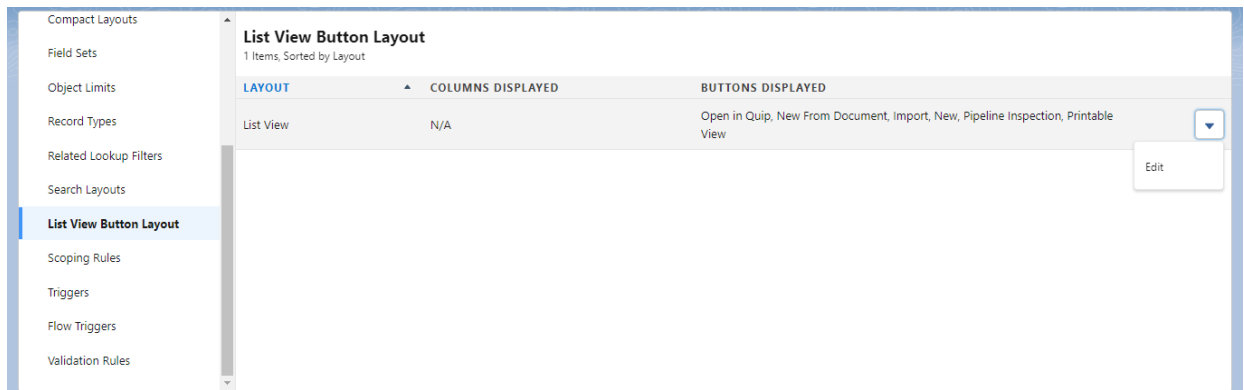
ABS
ACOS
ADDMONTHS
AGE
AGEON

/flow/List View Button Flow

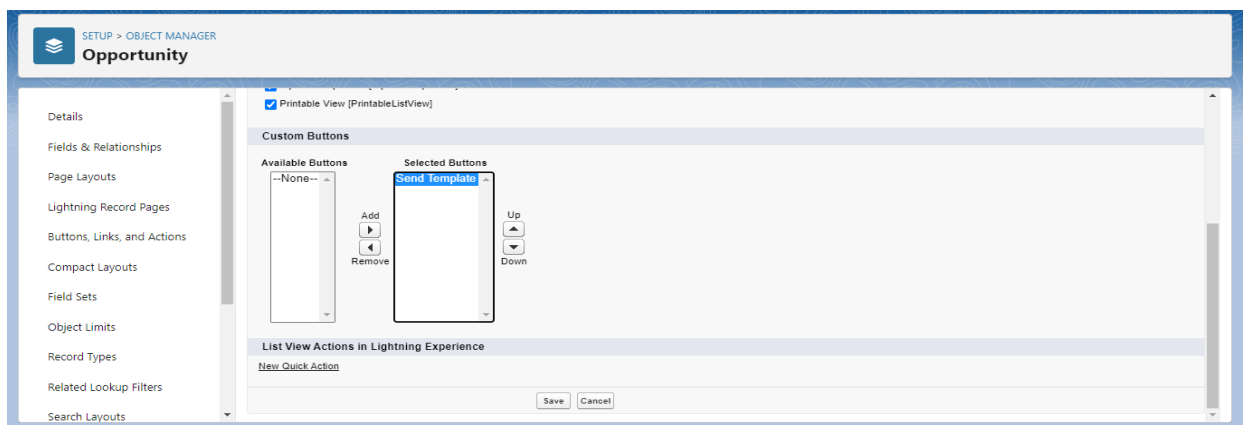
Quick Tips

- [Getting Started](#)
- [Sample Buttons & Links](#)
- [Operators & Functions](#)

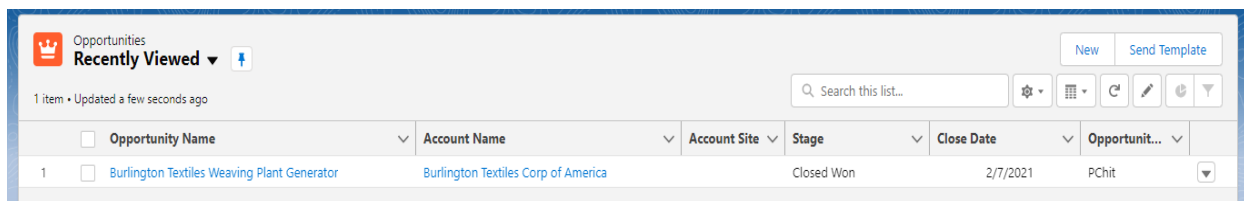
4. Click on ‘List View Button Layout’ from the options in the left then click on ‘Edit’ option from the dropdown in the List View layout row.



5. In the next window, add 'Send Template' from 'Available Buttons' list to the 'Selected Buttons' list and click on 'Save'



6. Now, the 'Send Template' button will appear beside the 'New' button on the desired object's list view.



Note: This functionality is only for desktop and is not available in Mobile.

Steps to give permission to WhatsApp Connector User

1. Go to the users and select the user you want to give access to WhatsApp Connector Application.
2. Go to Permission Set Assignment.
3. Give WhatsApp Connector User permission.
4. Enable Flow User Checkbox.
5. Save it.

Steps to Schedule and Update the status of WhatsApp Templates

1. Type Apex Classes in Quick Find box in setup.

Apex Classes

Apex Code is an object oriented programming language that allows developers to develop on-demand business applications on the Lightning Platform.

Percent of Apex Used: 1.17%
You are currently using 70,277 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.

Estimate your organization's code coverage [i](#)
[Compile all classes](#) [i](#)
View: [All](#) [Create New View](#)

Action	Name	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Del Security	ChangePasswordController	V2_Wtsp_Con	57.0	Active	376	Priyanshu Mathur, 3/13/2023, 4:14 AM	☐
Edit Del	ChangePasswordControllerTest	V2_Wtsp_Con	57.0	Active	480	Priyanshu Mathur, 3/13/2023, 4:14 AM	☐
Edit Del Security	ForgotPasswordController	V2_Wtsp_Con	57.0	Active	379	Priyanshu Mathur, 3/13/2023, 4:14 AM	☐

2. Click on Schedule Apex.
3. Select the class "GetWhatsAppTemplate_Schedulable".

Job Name:

Apex Class:

Schedule Apex Execution

Frequency: ☒ Weekly ☐ Monthly

Recurr every week on

☐ Sunday
☒ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday

Start: [7/10/2023]
End: [7/10/2023]
Preferred Start Time:

To Schedule it Daily Select checkbox of each day.

4. Select the desired date and time as per user's preference.

Steps to Delete Rejected WhatsApp Template

1. Type Apex Classes in Quick Find box in setup.
2. Click on Schedule Apex.
3. Select the class "BatchToDeleteWhatsAppTemplates_Schedule".
4. To Schedule it Daily Select checkbox of each day.
5. **Select** the desired date and time as per user's preference.

Steps to Delete Chat History

1. Type Apex Classes in Quick Find box in setup.
2. Click on Schedule Apex.
3. Select the class "BatchToDeleteChatHistory_Schedulable".
4. To Schedule it Daily Select checkbox of each day.
5. **Select** the desired date and time as per user's preference.