



# How to Integrate WhatsApp with Zoho Voice?

Zoho Voice offers a robust WhatsApp integration, allowing businesses to create and manage WhatsApp Business accounts, send and receive messages, utilize message templates, and share media files.

## Prerequisites

The following are the prerequisites for integrating WhatsApp with your Zoho Voice account:

1. A **Facebook Business Manager** account
2. A verified business
3. A **WhatsApp Business Account(WABA)**
4. A prepaid line of credit for your WhatsApp Business Account
5. A valid business phone number capable of receiving or making calls and SMS to access the WhatsApp Business API.

**Info:** Numbers from countries that do not support WhatsApp within their geographical boundaries cannot be used to access the WhatsApp Business API.

### Notes:

1. After verifying your business, it will be reviewed for compliance with the **WhatsApp Terms of Service** and **WhatsApp Commerce Policy**.
2. You cannot use WhatsApp phone numbers being used on other products. Only unused and registered phone numbers can be used for the integration.
3. **BSP Migration** is now supported.

## Steps to set up a WhatsApp channel on Zoho Voice

1. Log in to your **Zoho Voice** account with **Superadmin or Admin** privileges.
2. Select **Integrations** from the left menu bar.
3. Switch to **Instant Messaging** tab.
4. Navigate to **WhatsApp** and click on the **Configure** button.
5. To get started, Click on the **Add Number** button at the top right corner.
6. On clicking the **Add Number** button, Please ensure to agree to the **WhatsApp Business Terms of Service** pop-up prompt by selecting the **Agree** button to proceed with the onboarding process. If you choose not to agree, selecting the **Cancel** button will prevent access to WhatsApp via Zoho Voice.
7. **Connect your Facebook Business Manager account :**

A Facebook authentication window powered by Zoho Social pops-up.

**Info:** Zoho Voice implements WhatsApp's embedded signup flow powered by Zoho Social, enabling seamless onboarding for businesses to the WhatsApp Business Platform Cloud API directly from Zoho Voice. This is the entry point that enables you to link your **Facebook Business Manager account** and **WhatsApp Business Account** with Zoho Voice to chat with WhatsApp users via **WhatsApp Business API**.

- a. Login to Facebook using your personal Facebook account to access your **Facebook Business Manager** account.

**Note:** Your personal account involved in the signup flow must have admin privileges for your Facebook Business Manager account in order to set up and link your WhatsApp Business Accounts.

**Warning:** Do not keep the embedded Signup pop-up open for more than 1 hour, as the session will expire. Please ensure that you have all the above mentioned prerequisites ready before proceeding.

- b. Enter your login credentials in the provided fields and click **Continue** to confirm your identity.
- c. Once your identity is confirmed, Zoho Social will fetch and display your Facebook Business Manager accounts created using your personal Facebook account.

**Note:** Facebook allows only a maximum of two Business Manager accounts per Facebook account.

- d. Select the Facebook business manager account of your choice and click **Continue**.

## 8. Link your WhatsApp Business Account:

On the following window, select the **WhatsApp Business Account(WABA)** within your Selected Facebook Business Manager account, then click **Continue**.

## 9. Create your WhatsApp Business Profile:

Create your **WhatsApp Business profile** by following the steps below:

- a. Create a new **WhatsApp Business** profile by adding the essential details of your business, like your **WhatsApp Business Display Name** that you will use to message your customers, and click **Continue**.

**Note:** Make sure the display name meets the guidelines mentioned [here](#).

- b. Next, select your **Business Category** from the drop-down menu.

- c. Enter a brief **Description** of your business.

**Note:** The Category and business Description will both be visible to customers messaging your business.

## 10. Verify your WhatsApp Business Number:

- a. Select an existing WhatsApp business number or enter a new number to register.

**Note:** You cannot register a number that is currently registered on either WhatsApp Messenger or the WhatsApp Business App.

**Info:** Here, you can enter an active virtual number of your choice that you have purchased from Zoho Voice or ported into Zoho Voice.

- b. Select a verification method of your choice. You can choose between **Text Message** or **Voice Call**.

- c. Click **Send Code**.

- d. On the following window, enter the 6-digit verification code received on your WhatsApp business phone number.

- e. Click **Verify**.

- f. Once your WhatsApp Business phone number has been successfully verified, you will receive a prompt confirming the completion of the sign-up process.

- g. You will be asked to provide your approval, indicating that you are ready to begin your WhatsApp trial through Zoho Voice. Click **OK**.

## 11. Configure your WhatsApp Channel:

- a. Now you can get back on **Instant Messaging > WhatsApp** page, click on the **Add Channel** button on the top right corner.  
**Note:** The Add Channel button appears only when you successfully link your **Facebook Business Manager account** and **WhatsApp Business Account**.
- b. On the **Add Channel** window, Enter a name for the channel.
- c. Navigate to the field **WhatsApp Number** and click on the **View available numbers** button right next to it.
- d. Select the WhatsApp Business number added in the **Step 9.a.** from the list of available numbers.

### **Configuring Welcome Message**

- e. For the **Welcome Message** field, select the message of your choice from the dropdown that displays the list of already configured **Auto response** messages.
- f. In case you haven't configured any **Auto Response** message already, click on the **Configure** button on the right. This takes you to **Settings > Instant Messaging page**.
- g. Switch to the tab **Auto Response Messages**.
- h. Click on the **Add** button on the top right corner. The **New Auto Response** window opens.
  - i. Give a name for the new message in the **Name** Field.
  - j. Assign a suitable **Tag** for the new message.  
**Note:** Tags constitute custom categories that aid in quick classification and retrieval of messages from a list of multiple canned messages. An auto response message can possess multiple tags.
- k. Enter the text content for the new Canned Message in the **Message** field and click **Save**.  
**Note:** You can also include appropriate placeholders holding customized values within the **Message** field as you keep entering your message in the text box.

### **Configuring End Chat Message**

- l. For the **End Chat Message** field, select the message of your choice from the dropdown that displays the list of already configured **Canned messages**.
- m. In case you haven't configured any Canned messages already, click on the **Configure** button on the right. This takes you to **Settings > Instant Messaging page**. Switch to the tab **Canned Messages**.
- n. Click on the **Add** button on the top right corner. The **New Canned Message** window opens.
- o. Give a name to identify the new message in the **Name** Field.
- p. Assign a suitable **Tag** for the new message.  
**Note:** Tags constitute custom categories that help in quick classification and retrieval of canned messages from a list of multiple canned messages. A Canned Message can possess multiple tags.
- q. Enter the text content of the Canned Message in the **Message** field and click **Save**.  
**Note:** You can also include appropriate placeholders holding customized values within the **Message** field as you keep entering your message in the text box.
- r. Once the message is saved, the new Canned Message can be searched and selected from the dropdown available near the Welcome Message field as mentioned in the **Step 9.1**
- s. Provide the names of the specific agents who will have access to the newly created WhatsApp channel.  
**Note:** Super Admins and Admins are automatically associated with all channels by default.
- t. Click **Save** to create a new WhatsApp channel successfully.  
**Note:** Once the channel is created, all the agents associated with the channel will be notified of the association.