

ONBOARDING GUIDE

WhatsApp Business



CONTENTS

BEFORE WE START	3
1. Do you have a Facebook Business Account?.....	3
2. Is your Facebook Business Account Verified?.....	5
3. Important Links for WhatsApp Business	7
GETTING STARTED	8
4. Prerequisites.....	8
5. Onboarding Journey with CM.com.....	8
6. Creating a new WhatsApp Business Profile in Facebook Business Manager for a Customer	10
7. Creating a WhatsApp Business Channel with CM.com.....	11
8. Granting CM.com permission to send WhatsApp Business messages on behalf of the Customers.....	11
9. Facebook Business Verification – complete and confirm Verified	12
10. The WhatsApp Business Display Name and Account Approval	12
11. Telephone Number to use for the WhatsApp Business Profile	13
12. Facebook Verifies the Telephone number with a One Time Pin.....	13
13. Adding Users to the Customers profile on the CM.com Platform	14
14. Subscribe to CM.com STATUS Pages	15

BEFORE WE START

There are a few essential requirements to take into consideration when initially engaging with the Customer about WhatsApp Business.

Understanding the status of your **Facebook Business Account** and if the account has been successfully **Verified** by Facebook. This will ensure a seamless start to onboarding the Customer onto the CM.com WhatsApp Business platform.

Facebook is particular about which verticals they will consider granting permission to, for a WhatsApp Business Account. Familiarise yourself with the Commerce and Business Policies.

1. Do you have a Facebook Business Account?

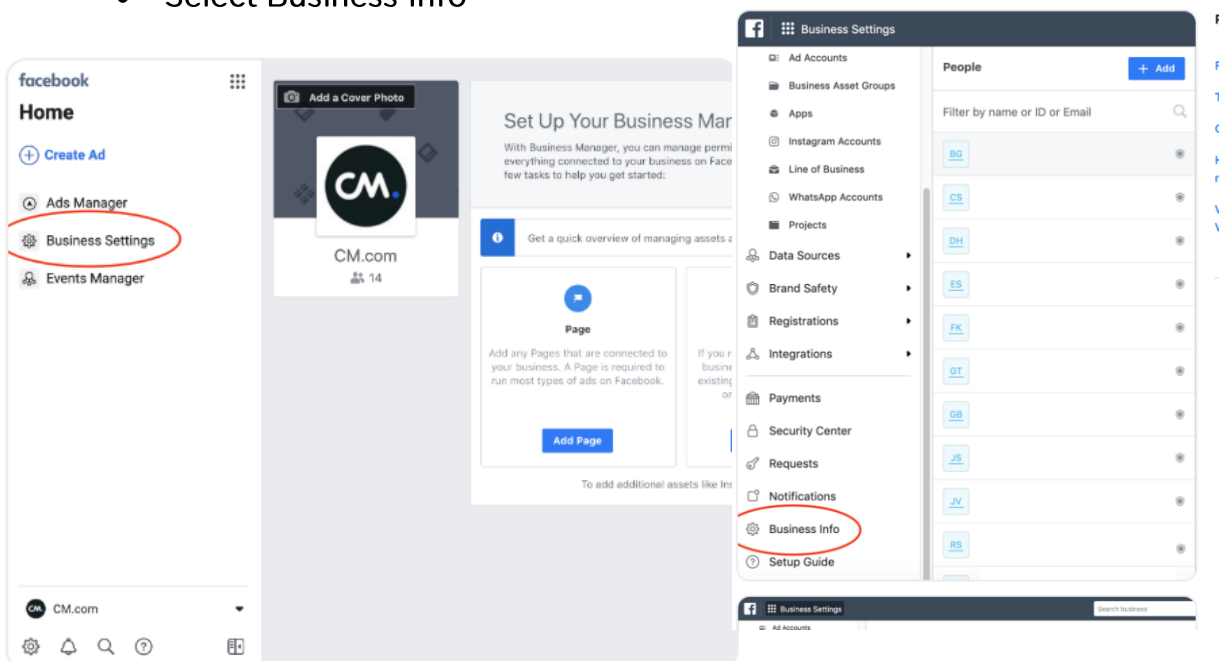
Who is responsible: The Customer

How do I know if we have one? If your company already manages advertisements, events or has an official Facebook page or Instagram account, then possibly you already have a FB Business Manager account. Make sure to check with different departments within your company, before making a new one.

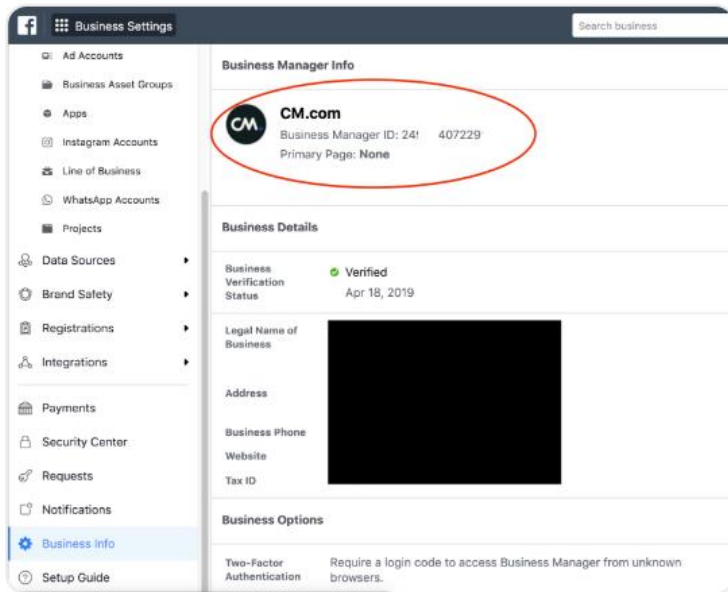
YES Great News, you will be able to provide your Facebook Business Manager ID when required.

Please provide your **Facebook Business Manager ID** – this is how and where you can find it

- <https://www.cm.com/help/4605/where-is-my-facebook-business-manager-id/>
- Log into your **Facebook Business Manager**
- Select **Business Settings**
- Select **Business Info**

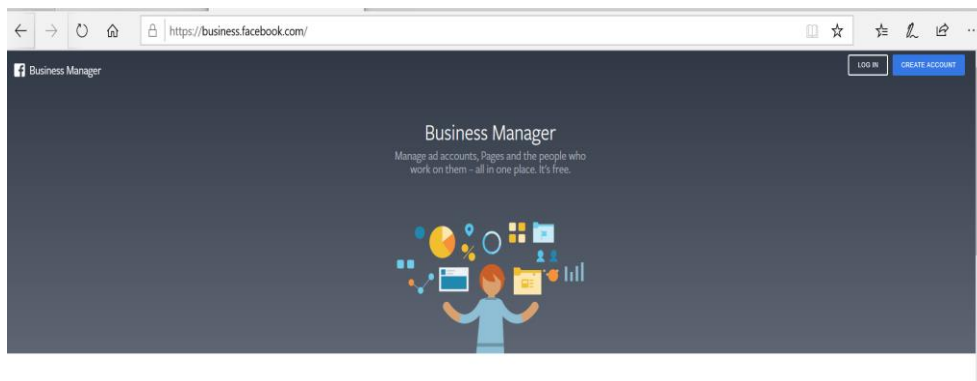


- Below the **Business Manager Info** and **Company Name**, you will find your **Business Manager ID**



NO What do I do? Easy, go to Facebook Business Manager to get started.

- <https://www.facebook.com/business/news/Business-Manager>



- Select **Create Account**
- Ensure you use the correct and valid Business details when creating the Account in Facebook Business Manager

2. Is your Facebook Business Account Verified?

Who is responsible: The Customer

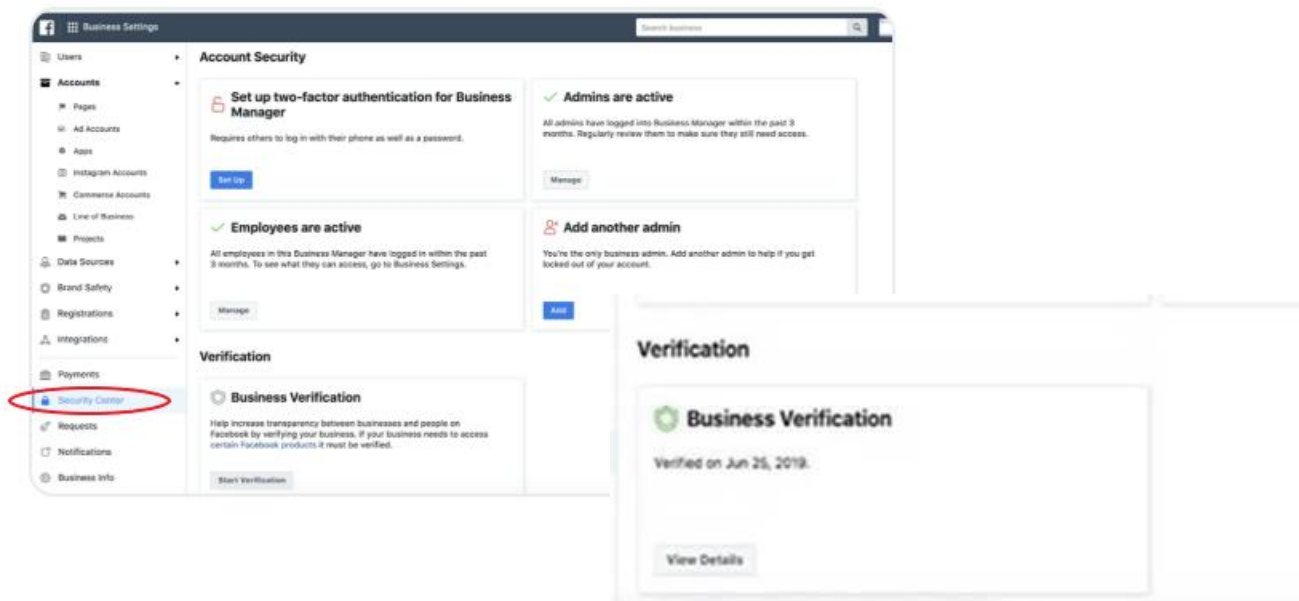
All WhatsApp accounts require a **Verified Facebook Business account** in order to be able to use WhatsApp Business messaging. Why you need to complete this?

- To make sure a company really exists.
- To confirm that all your Facebook resources like Facebook pages, Instagram and WhatsApp accounts and Facebook ads can be linked to your business.
- To ensure at least 2 employees, have access to the business accounts with their business emails registered, not personal emails. Should one person leave, your company, someone else will still has access.
- The business must initiate the verification process themselves as it requires company specific documentation.
- A Business verified account does not entitle you to: An [Official WhatsApp Business](#) account (a green checkmark in the WhatsApp app) or a verified Facebook page (blue checkmark next to your Facebook page)

YES Great News, let us continue with the journey.

NO I do not know, where do I check?

- In your Facebook Business Manager account, select **Business Settings** and then **Security Center**
- You will see the below image confirming **Business Verification** and a date



NO Business Verification is not complete

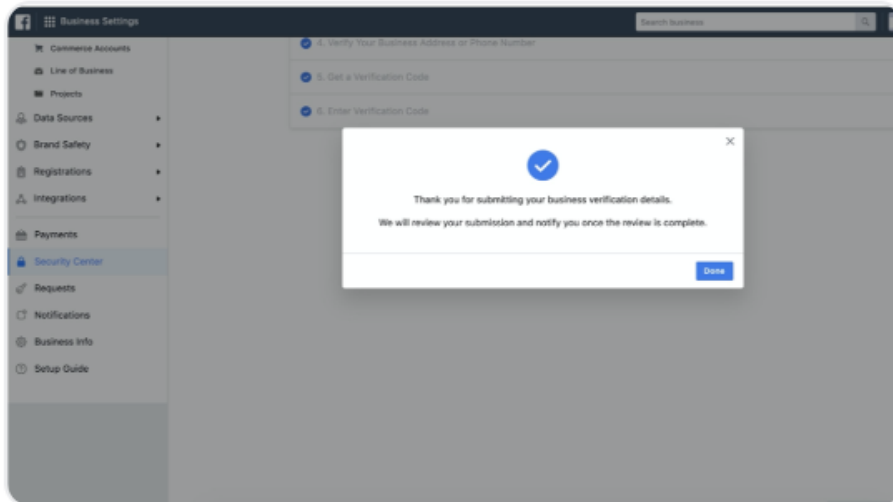
- If the below screen is available for you to complete, you can proceed and initiate the process, enter the information about your business (as per image below) and attach the correct documents when prompted. This information is only for Facebook, consumers will not see it. To see which types of documents are accepted, the following link is important.
- <https://www.facebook.com/business/help/2058515294227817?id=180505742745347>
- If the below screen is not available, you will need CM.com to apply for a WhatsApp Business Account first and then proceed with completing the above.

The screenshot shows the Facebook Business Settings interface. On the left is a sidebar menu with options: Users, Accounts (Pages, Ad Accounts, Apps, Instagram Accounts, Commerce Accounts, Live of Business), Projects, Data Sources, Brand Safety, Registrations, Integrations, Payments, Security Center (highlighted), Requests, Notifications, and Business Info. The main content area is titled 'Security Center' and shows a progress bar with three steps: '1. Enter Your Business Details' (active), '2. Select Your Businesses', and '3. Confirm Your Business Details'. Under step 1, it says 'Please provide the following business details. These details will be used to verify your business.' and 'Enter the business name as shown on official documents'. The form fields include: 'Legal Name of Business' (text input), 'Country' (dropdown menu showing 'United States'), 'Street Address' (text input with placeholder '1 Hacker Way'), 'Street Address 2/Locality' (text input), 'City' (text input with placeholder 'Menlo Park') and 'State/Province/Region' (text input with placeholder 'California'), 'ZIP/Postal Code' (text input with placeholder '94025') and 'Business Phone Number' (text input with placeholder '(510) 800-8017'), and 'Website' (text input with placeholder 'http://facebook.com/'). A 'Next' button is at the bottom of the form.

- You will need to verify your **contact information** via **phone** or **business email**.
- Once completed, you will receive a message confirming the submission of the business information.

The screenshot shows the Facebook Business Settings interface. On the left is the same sidebar menu as in the previous image. The main content area is titled 'Security Center' and shows a progress bar with three steps: '1. Set up two-factor authentication for Business Manager' (active), '2. Select Your Businesses', and '3. Confirm Your Business Details'. Under step 1, it says 'Set up two-factor authentication for Business Manager' and 'Requires others to log in with their phone as well as a password.' There is a 'Get It' button. Below this, it says 'Admins are active' and 'All admins have logged into Business Manager within the past 3 months. Regularly review them to make sure.' There is a 'Manage' button. Below this, it says 'Employees are active' and 'All employees in this Business Manager have logged in within the past 3 months. To see what they can access, go to Business Settings.' There is a 'Manage' button. Below this, it says 'Add another admin' and 'You're the only business admin. Add another a locked out of your account.' There is a 'Add' button. Below this, it says 'Business Verification' and 'Verified on Jun 28, 2018.' There is a 'View Details' button. On the right side, there is a 'Notifications' panel with a list of notifications: 'Verification status: Verified' (with a 'See' link), 'ABC Solution Provider invited you to message on behalf of a WhatsApp account: Fresh Problem' (with a 'See' link), and 'Mark All as Read' and 'See All' buttons at the bottom.

- The submission status will be reflected in **Business Verification** card located in **Security Center**. When the Facebook team completes verification, you will receive a notification and the status will change to “Verified.”



3. Important Links for WhatsApp Business

[Who is responsible:](#) The Partner, the Customer and CM.com

WhatsApp has rules and regulations that you as the Partner, need to be familiar with to keep the Customer informed, when building products and services around the WhatsApp Business products.

- WHATSAPP BUSINESS COMMERCE POLICY
<https://www.whatsapp.com/legal/commerce-policy>
- WHATSAPP BUSINESS POLICY
<https://www.whatsapp.com/legal/business-policy>
- BUSINESS SOLUTION TERMS
<https://www.whatsapp.com/legal/business-solution-terms>
- BUSINESS TERMS AND POLICIES
<https://www.whatsapp.com/legal/business-terms>
- DATA PROCESSING TERMS
<https://www.whatsapp.com/legal/business-data-processing-terms>
- BRAND GUIDELINES
<https://whatsappbrand.com>

GETTING STARTED

Once the Commercials are discussed, Contracts signed and Effective billing dates agreed with your Business Development Manager / Account Manager, the successful onboarding of the CM.com WhatsApp Business Account can begin.

It is best to provide all the correct information to create the WhatsApp Account and Profile to avoid any delays.

4. Prerequisites

- Do not create a new Facebook Business Account if your company already has one (to manage Facebook ads or Facebook pages).
- The account must belong to the company on whose behalf you want to send the messages. If you are a software integrator, you cannot use your own Facebook Business account.
- If an Agency manages the Facebook Business account, the Agency Facebook Business Account details can not be used. A new stand-alone account must be created only for the WhatsApp Profile. No billing or other features must be associated with the stand-alone Profile.

- **OPT IN Requirement**

If a communication is to be sent, outside the customer care window, an opt-in is required. Once you have obtained the opt-in, you can send the customer one of the templates you have had approved by WhatsApp.

<https://developers.facebook.com/docs/whatsapp/guides/opt-in/>

5. Onboarding Journey with CM.com

Who is responsible: The Customer, the Partner, your CM.com Customer Success Manager & Business Development Manager| Account Manager

STEPS to be completed to ensure an efficient and successful onboarding of the CM.com WhatsApp Business Account.

- **Communication:** Identify the key stakeholders, that we will communicate with during the onboarding process. Regular updates will be shared during the process.
- **Timelines:** We can have the WhatsApp Business account approved and ACTIVE with in 7- 10 working days, only if all the information provided is correct before we start the onboarding. This will avoid any rejections from Facebook.

- How will you connect to the CM.com Platform? Via API and or via CM.com Customer Contact.
- Onboarding overview: Each STEP, associated activity and who is responsible to complete the activities is provided upfront post receiving all the documents.

Example of the WhatsApp Business Onboarding Overview

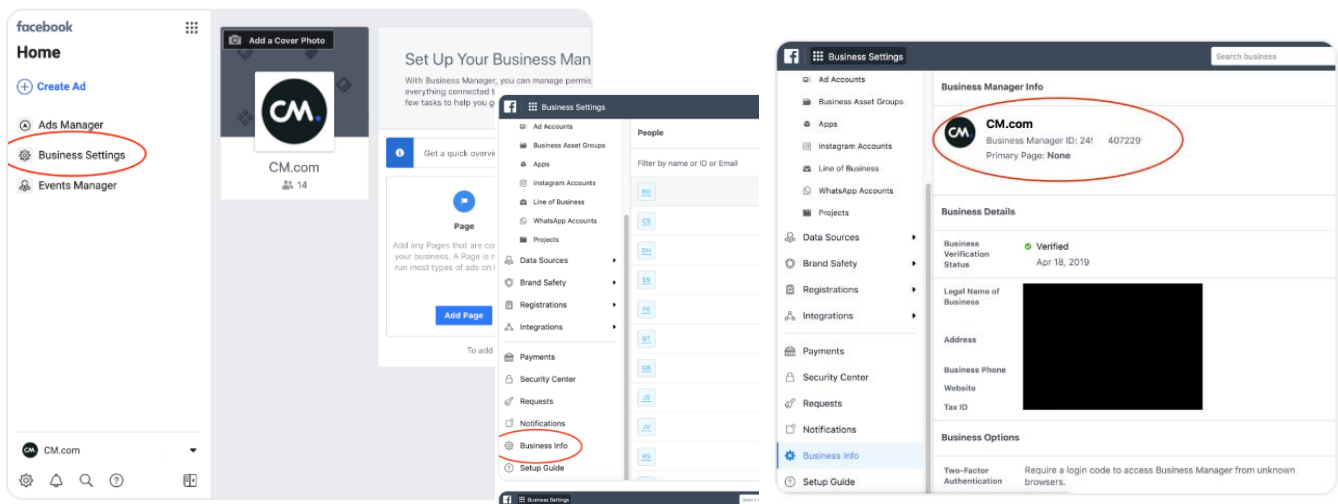
CUSTOMER WhatsApp_ 'PACKAGE SELECTED' Effective Date (Billing): Example 1 January 2020		Status Onboarding	BUSINESS USE CASE: To be shared
	<u>ACTION</u>	<u>RESPONSIBLE</u>	<u>DETAIL</u>
			-
STEP 1	Load Contract & create WhatsApp Profile & Account in CM.com Systems for CUSTOMER	CM.com	COMPLETE Creating WhatsApp profile & COMPLETE setting up Contracts
STEP 2	Create WhatsApp profile in Facebook Manager	CUSTOMER CM.com	COMPLETE - Facebook Manager has accepted the Facebook Manager ID provided
STEP 3	Accept CM.com can send on your behalf	CUSTOMER	READY Click here https://www.cm.com/help/4906/approving-messaging-on-behalf-of-request
	Complete Facebook Verification	CUSTOMER	READY Click here https://www.cm.com/help/4927/completing-facebook-business-verification
STEP 4	Assign +27XXXXXXXX to the Facebook Business Account & Name (FB 2- 4 days)	CM.com	NOT STARTED Facebook Rules to consider for the Display name: https://developers.facebook.com/docs/whatsapp/guides/display-name
STEP 5	Number Verification with One Time Pin (OTP)	CUSTOMER CM.com	NOT STARTED An OTP will be sent to +27XXXXXXXX by Facebook. IF the number is provided by the Customer , CM.com can assist with completing this step. IF the number is provided by CM.com we will complete this step.
STEP 6	How are you Connecting - API or with the CM.com Customer Contact	CUSTOMER PARTNER CM.com	NOT STARTED Partner developing an API and workflow or Connecting to our Customer Contact

6. Creating a new WhatsApp Business Profile in Facebook Business Manager for a Customer

Who is responsible: The Customer to provide the correct information and CM.com to create the Profile.

A new **WhatsApp** profile is created in Facebook Business Manager by CM.com for the Customer.

- Facebook Business Manager ID – A reminder where I can find this?
- <https://www.cm.com/help/4605/where-is-my-facebook-business-manager-id/>
- Log into your Facebook Business Manager
- Select Business Settings
- Select Business Info
- Below the Business Manager Info and Company Name, you will find your Business Manager ID
-



- **WhatsApp information Form 100% Correct and Complete** – provided to you by your Business Development Manager/ Account Manager @ Commercial discussion phase. Information we need to initiate the set-up of the account is provided in this form.
- Company Information
- WhatsApp Channel Information
- Profile Image: 640x640 resolution | jpeg

7. Creating a WhatsApp Business Channel with CM.com

Who is responsible: The Customer to provide the information and CM.com to create profile in Channels.

The correct information in the **WhatsApp information Form** and CM.com to create the Business Channel Account on the CM.com platform.

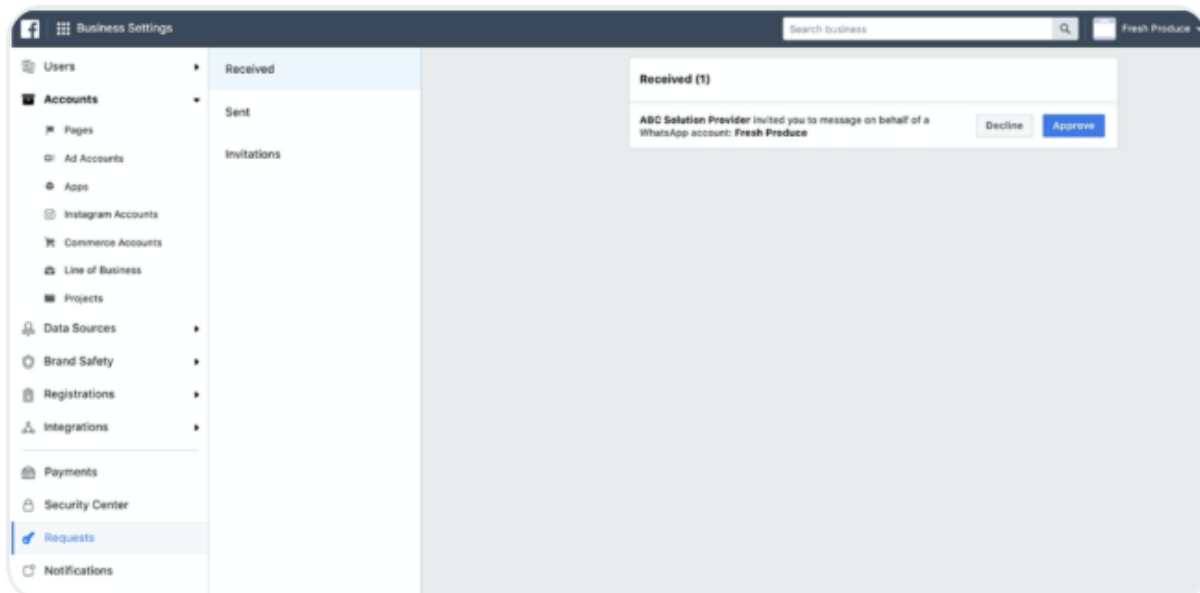
8. Granting CM.com permission to send WhatsApp Business messages on behalf of the Customers

Who is responsible: The Customer

After CM.com has requested a WhatsApp Business account for the Customer from Facebook, a notification to grant CM.com permission to send messages on your behalf, will need to be approved.

Where do I do this?

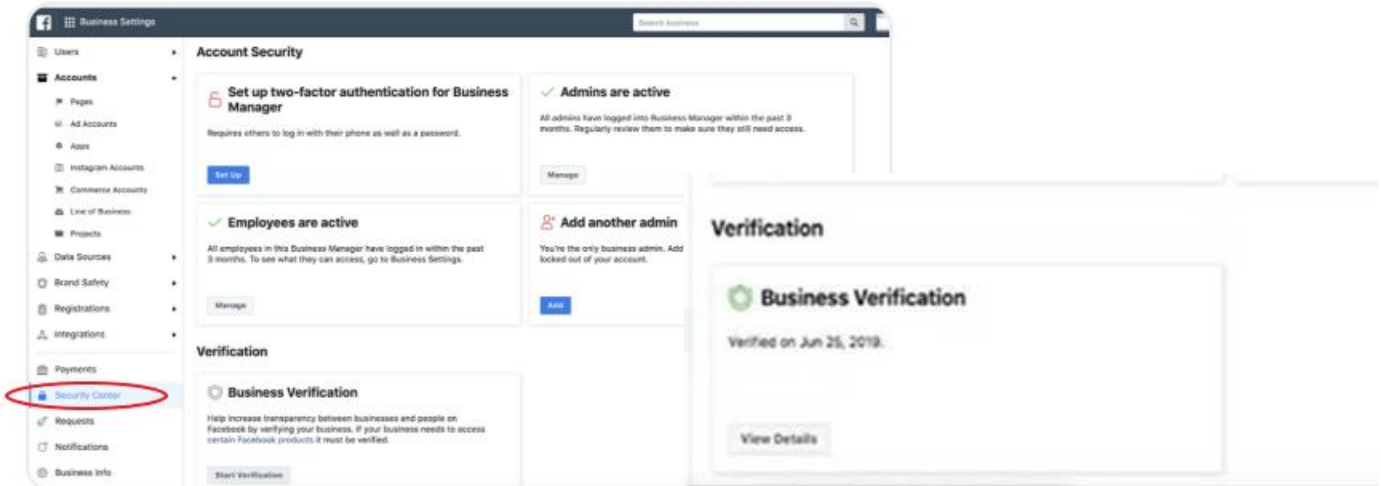
- Go to your Facebook **Business Manager**
- Select **Business Settings**
- Click the option **Requests**
- Select the section **Received** and **Approve the request**



9. Facebook Business Verification – complete and confirm Verified

Who is responsible: The Customer

- As detailed in Point 2 this can be confirmed by checking in your Facebook Business Manager under Business Settings and then Security Center



10. The WhatsApp Business Display Name and Account Approval

Who is responsible: The Customer

All Display Names for the WhatsApp Business Profile must have a relationship with the Business applying for the account and comply with the Facebook [Commerce](#) and [Business](#) policies

- Please orientate the Customer with the guidelines set out by Facebook. See link below:
- <https://developers.facebook.com/docs/whatsapp/guides/display-name#display-name-guidelines>

11. Telephone Number to use for the WhatsApp Business Profile

Who is responsible: The Customer

A Telephone number can be provided by the Customer or CM.com can provide a number for the Customer.

The number must be a valid phone number. Short codes are not allowed on the WhatsApp platform. The number must include a country and area code. Landline and cell phone numbers are acceptable phone numbers to use. This phone number must be able to receive voice calls or SMS in order to complete the number verification with a One Time Pin (OTP) generated by Facebook.

- If a number is provided by CM.com we will require **RICA** documentation.
- **NB:** Once a phone number is registered on the WhatsApp Business API, it cannot be used for WhatsApp Business or the WhatsApp consumer app

12. Facebook Verifies the Telephone number with a One Time Pin

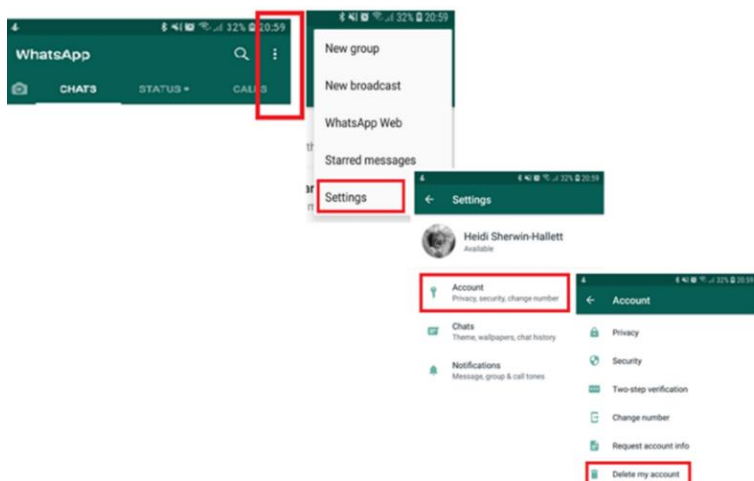
Who is responsible: The Customer| The Partner when they provide their own number for the WhatsApp Account with the assistance of CM.com

OR

When CM.com provides the number, we will complete this step on behalf of the Customer / Partner.

Some points that need to be considered to ensure this is completed successfully.

- To prepare for the generation of the One Time Pin from Facebook, we request a certificate from the Facebook Business Manager Platform.
- If the **certificate** will not generate it confirms there is a WhatsApp Account **active** on the number. Please ensure the following steps are followed to **delete** the WhatsApp Account.



- If there is an **active IVR** on the number provided by the Customer, this will need to be disabled to allow the number to **receive a voice activated call** with the **One Time Pin**. This will be coordinated with the Partner.
- To complete this step, you will need to allow at least **20 minutes**
- The request for the **One Time Pin** is generated from within the Customer Profile on the CM.com platform, but the Pin is generated by the Facebook platform.
- Once the pin is requested the number will receive a call. A Pin will be read out. This Pin is entered into the Customer Profile on the CM.com Platform.
- Once we submit and receive confirmation, the Customers **WhatsApp Business Account** is **ACTIVE**

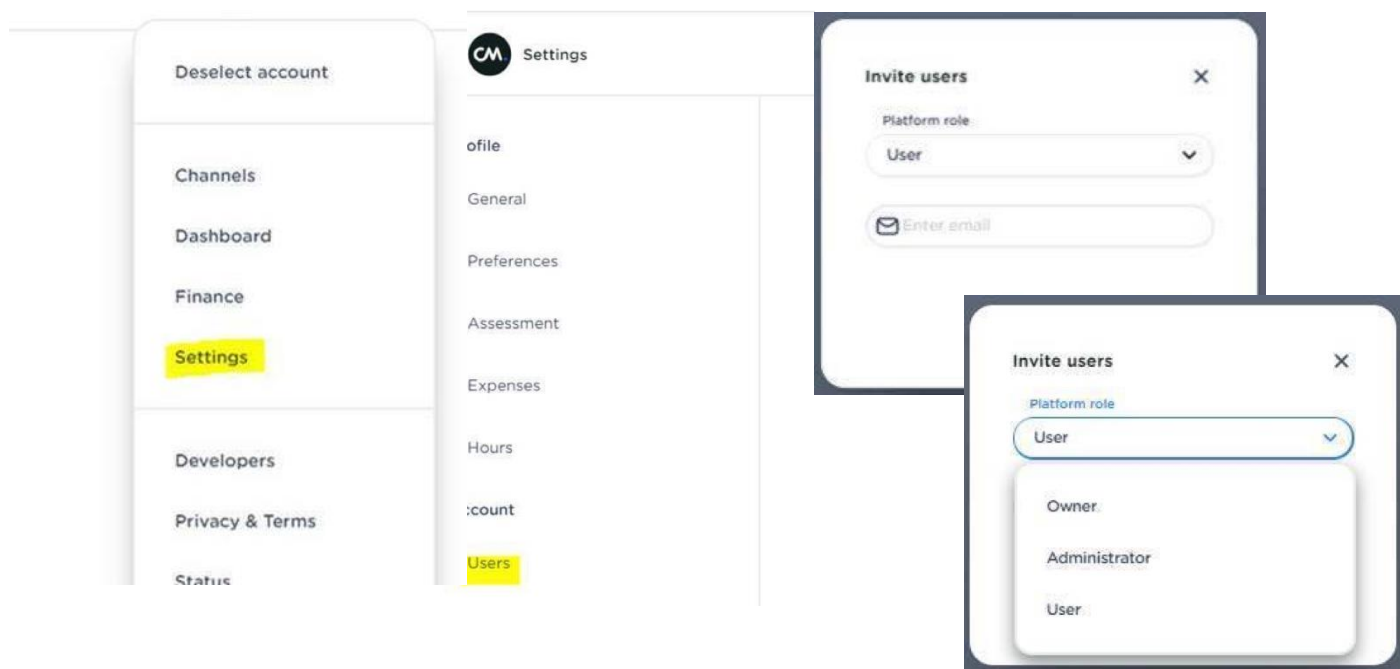
13. Adding Users to the Customers profile on the CM.com Platform

Who is responsible: The Partner and CM.com

- Whoever is detailed as the Contact for the WhatsApp Business Account is automatically the **owner** under the Customer Profile on the CM.com platform
- This person will be able to **add users** to the account profile

How to do this?

- Log into the Customer profile and click on your profile at the Top Right
- A drop down will display and select **Settings**
- On the left side you will see another drop down Select Users. A list of users and their platform role is displayed
- Click on the **+** and you will be able to invite additional user | **Owner** or **Administrator** by adding their **email address** and **platform role**
- An email is sent to the invitee from the CM.com platform. They will need to follow the steps to be granted access.
- The invite must be accepted within 24 hours or it will expire



14. Subscribe to CM.com STATUS Pages

Who is responsible: The Partner

You will be proactively notified of all maintenance and any service disruptions. We encourage you to subscribe and receive notifications via email and SMS updates:

<https://status.cm.com>