

facebook



USER GUIDE

Facebook and WhatsApp Integration

Release Version 7.2

Facebook & WhatsApp Integration

TABLE OF CONTENTS

1. SYSTEM DIAGRAM OVERVIEW	3
2. CMP (COMMSWARE MESSAGING PLATFORM)	4
INTRODUCTION	4
KEY COMPONENTS	4
3. DEPLOYING CMP ON SERVERWARE	5
REQUIREMENTS	5
INSTRUCTIONS	5
INSTALLING THE VPS	5
INSTALL OFFICIAL CMP OCI TEMPLATE	5
CREATE A NEW VPS	6
RUNNING THE VPS	8
MENAGING THE VPS	8
CONFIGURING CHANNEL SETTINGS	9
4. FACEBOOK INTEGRATION	11
PREREQUISITES	11
SYSTEM REQUIREMENTS	11
CMP SERVICE	12
FACEBOOK INTEGRATION REQUIREMENTS	13
FACEBOOK ACCOUNT	13
FACEBOOK BUSINESS ACCOUNT	13
META DEVELOPER ACCOUNT	13
CREATE META APP	13
FACEBOOK INTEGRATION WORKING LOGIC	14
5. WHATSAPP INTEGRATION	15
PREREQUISITES	15
SYSTEM REQUIREMENTS	15
CMP SERVICE	16
WHATSAPP INTEGRATION REQUIREMENTS	17
PHONE NUMBER	17
FACEBOOK ACCOUNT WITH A BUSINESS MANAGER	17
360DIALOG WHATSAPP PARTNER ACCOUNT	17
WHATSAPP INTEGRATION WORKING LOGIC	18
6. FACEBOOK BUSINESS ACCOUNT	19
7. META DEVELOPER ACCOUNT	22
8. CREATE FACEBOOK APP	25
9. CONNECT CMP SERVICE WITH FACEBOOK AND WHATSAPP	29
CONFIGURE CMP SETTINGS FOR FACEBOOK APP	29
CONFIGURE CMP SETTINGS FOR WHATSAPP	30

10. CONFIGURE CMP SETTINGS WITHIN THE PBXWARE SYSTEM	31
11. ADDING THE FACEBOOK CHANNEL WITHIN THE PBXWARE	32
GETTING STARTED	32
LOCATE THE CHANNELS SECTION	32
INITIATE CHANNEL CREATION	32
CHANNEL OPTIONS	32
CHANNEL TYPE	32
SETTING UP YOUR FACEBOOK CHANNEL	33
SETTING UP CMP AND CONNECT WITH FACEBOOK	33
12. ADDING THE WHATSAPP CHANNEL WITHIN THE PBXWARE	40
GETTING STARTED	40
LOCATE THE CHANNELS SECTION	40
INITIATE CHANNEL CREATION	40
CHANNEL OPTIONS	40
CHANNEL TYPE	40
SETTING UP YOUR WHATSAPP CHANNEL	41
SETTING UP CMP AND CONNECT WITH WHATSAPP	41
SIGN UP FOR 360DIALOG ACCOUNT	42
LOGIN WITH 360 DIALOG ACCOUNT:	53

1. System Diagram Overview

This diagram is designed to provide a visual guide for understanding the integration requirements and setup process for Facebook and WhatsApp channels within your PBXware systems. Each element represents a crucial aspect of the integration, outlining what is needed to establish and maintain effective communication channels with customers using these platforms.

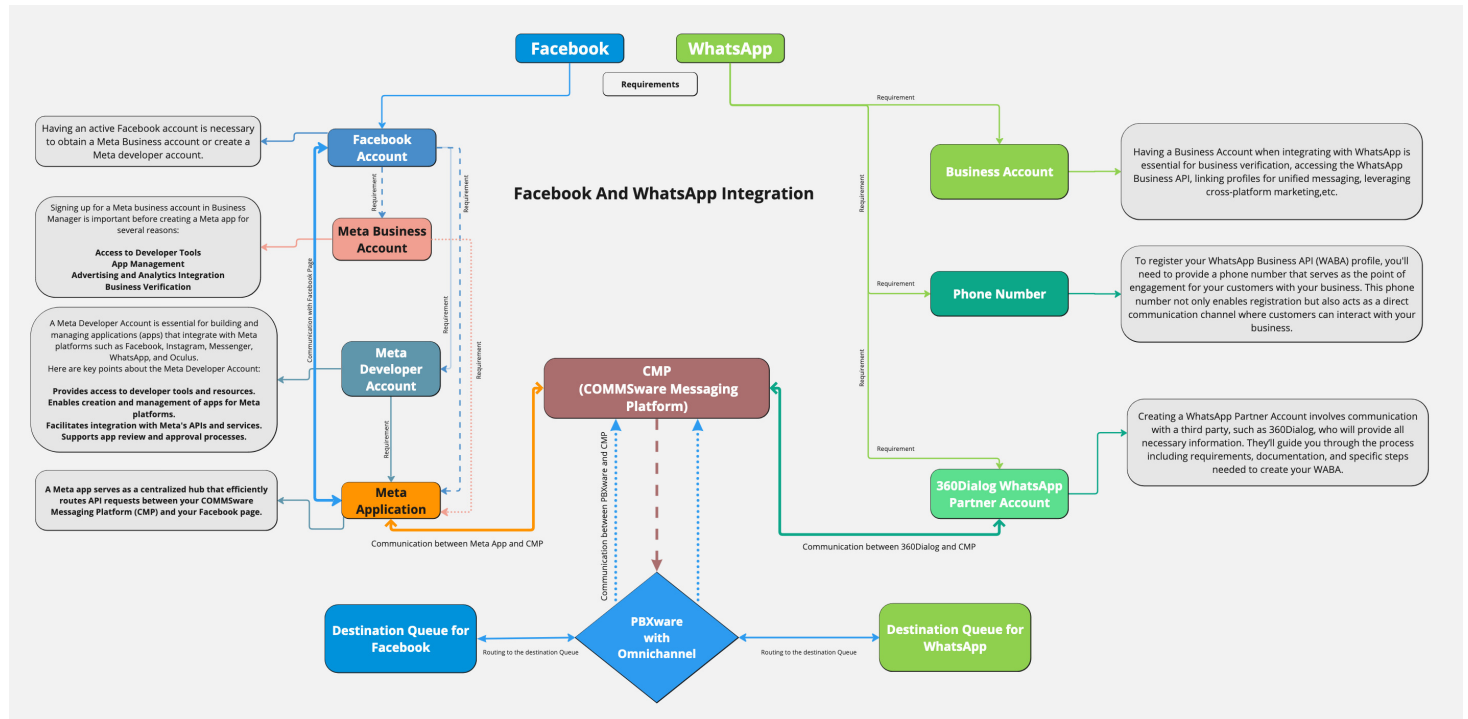


Figure 1. Diagram Overview

2. CMP (COMMSware Messaging Platform)

Introduction

The COMMSware Messaging Platform (CMP) service is a bespoke solution designed to function as a proxy between your omnichannel system and meta-information related to messaging interactions.

The CMP service is a vital intermediary component within your omnichannel architecture, facilitating communication and data exchange between the omnichannel system and various messaging platforms. It acts as a bridge, allowing your omnichannel system to efficiently manage and process messaging interactions while abstracting the complexities of handling meta-information associated with these interactions.

Key Components

Main Services: The core of the platform consists of three primary services:

- **core:** This component comprises the webhook handler and static file server, which are indispensable for the system's functioning. It's crucial to have at least one instance of this service running.
- **worker:** Responsible for processing inbound messages. Running multiple instances of this service can enhance throughput and efficiency.
- **sender:** Dedicated to sending outbound messages. Unlike the worker service, the sender service is restricted to a single instance.

Channel Adapters: Tailored to integrate with popular communication channels such as Facebook and WhatsApp. They likely provide a unified interface for interacting with these platforms, simplifying integration efforts.

Web Application (Angular): A modern, front-end web application built using Angular.

JavaScript SDK: A toolkit to facilitate easy Signup integration.

3. Deploying CMP on SERVERware

Let's explore a step-by-step guide on setting up the COMMSware Messaging Platform (CMP) on a SERVERware VPS using the official OCI template and registry.

Requirements

Before beginning, please ensure you have the following prerequisites:

- SERVERware 4.5 with KVM support installed.
- A registered domain and public IP address, such as example.domain.org
- SSL certificate is required, but one will be automatically installed (from Let's Encrypt)

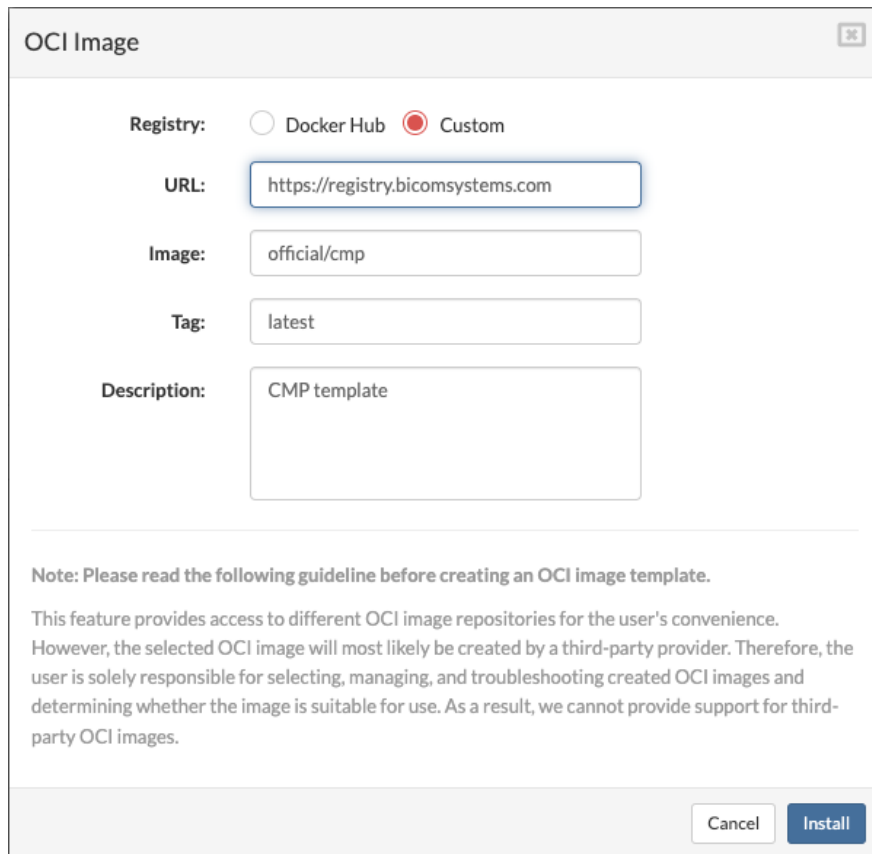
Instructions

Installing the VPS

Here's how you can set up the COMMSware Messaging Platform (CMP) on your SERVERware

Install Official CMP OCI Template

1. Go to System settings, then Templates, and select OCI Image.
 2. Check if "official/cmp" is available and enabled. If not, click on Install New Template.
 3. Choose Custom as your registry option, and enter registry.bicomsystems.com.
 4. For the image name, input official/cmp, and for the tag, type in latest.
 5. Optionally, you can add a description if you wish, then click Install.
-



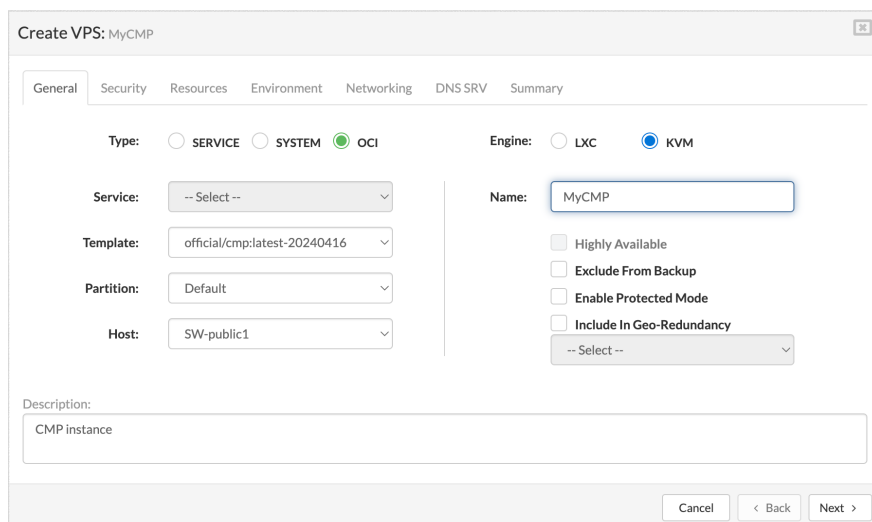
The image shows a window titled "OCI Image" with a close button in the top right corner. It contains several input fields and a note. The "Registry" section has two radio buttons: "Docker Hub" (unselected) and "Custom" (selected). The "URL" field contains "https://registry.bicomsystems.com". The "Image" field contains "official/cmp". The "Tag" field contains "latest". The "Description" field contains "CMP template". Below these fields is a note that reads: "Note: Please read the following guideline before creating an OCI image template. This feature provides access to different OCI image repositories for the user's convenience. However, the selected OCI image will most likely be created by a third-party provider. Therefore, the user is solely responsible for selecting, managing, and troubleshooting created OCI images and determining whether the image is suitable for use. As a result, we cannot provide support for third-party OCI images." At the bottom right are "Cancel" and "Install" buttons.

Figure 2. Official CMP OCI Template

Create a New VPS

Once you've confirmed that the CMP OCI template is available, follow these steps:

- Navigate to VPSs and click on Create VPS.
- Choose the OCI type and select the official/cmp installation option.
- Select KVM as the engine for virtualization.



The image shows a window titled "Create VPS: MyCMP" with a close button in the top right corner. It has a tabbed interface with "General" selected. The "Type" section has three radio buttons: "SERVICE" (unselected), "SYSTEM" (unselected), and "OCI" (selected). The "Engine" section has two radio buttons: "LXC" (unselected) and "KVM" (selected). The "Service" dropdown is set to "-- Select --". The "Template" dropdown is set to "official/cmp:latest-20240416". The "Partition" dropdown is set to "Default". The "Host" dropdown is set to "SW-public1". The "Name" field contains "MyCMP". There are four checkboxes: "Highly Available" (unchecked), "Exclude From Backup" (unchecked), "Enable Protected Mode" (unchecked), and "Include In Geo-Redundancy" (unchecked). Below these is a dropdown set to "-- Select --". The "Description" field contains "CMP instance". At the bottom right are "Cancel", "< Back", and "Next >" buttons.

Figure 3. Create a VPS

- After selecting the virtualization, click on the "Next" button. Then, proceed to generate a secure password for your VPS.

- When selecting the instance size, it's recommended to choose the 'Large instance flavor' for the best performance.

The screenshot shows the 'Create VPS: MyCmp' window with the 'Resources' tab selected. The 'Instance Flavor' dropdown is set to '-- Select --'. Below it, the 'Mount points' section shows 'Size of temporary directory' at 256 MB (with a warning 'Mount point exceeds 50% of VPS RAM') and 'Size of run directory' at 128 MB (with a warning 'Mount point exceeds 25% of VPS RAM'). The 'Flavor Details' sidebar on the right shows 'CPU Priority: N/A', 'Memory Limit: 0', 'Volume Size: 0', and 'Partition Quotas' for VPSs (10/10 Available), Memory (29696 MB/110592 MB Available), and Storage (175 GB/530 GB Available). Navigation buttons at the bottom include 'Cancel', '< Back', and 'Next >'.

Figure 4. Instance Size

- In the "Environment" tab, customize the values to suit your instance needs and add them as environment variables. Below are examples of configuration parameters for the CMP service:

The screenshot shows the 'Create VPS: MyCmp' window with the 'Environment' tab selected. It features a form to 'Enter custom environment variables for the VPS:' with 'Name' and 'Value' input fields and an 'Add' button. Below this is a table of existing environment variables:

Name	Value	
CMP_DOMAIN	cmp.example.org	✖
LETS_ENCRYPT_EMAIL	info@example.org	✖
CMP_ADMIN_USER	admin	✖
CMP_ADMIN_PASSWORD	pa55w0rd!	✖

Navigation buttons at the bottom include 'Cancel', '< Back', and 'Next >'.

Figure 5. Enviroment Variables

List of available variables:

- CMP_DOMAIN: your domain, e.g. cmp.example.org - REQUIRED
- LETS_ENCRYPT_EMAIL: email for LE certificate (for automatic SSL certificate) - REQUIRED
- CMP_ADMIN_USER: username for administration - REQUIRED
- CMP_ADMIN_PASSWORD: password for administration - REQUIRED
- CMP_HTTP_PORT: on which port should CMP run (default: 80)
- CMP_CHANNELS: comma-separated list, optional (default: facebook, whatsapp)
- CMP_PUBLIC_BASE_URL: base endpoint for webhooks, (default: <https://{CMP DOMAIN}>)
- NATS_TOKEN: authentication token for NATS clients (defaults to no authentication)

- `CMP_FALLBACK_AVATAR_URL`: facebook only, default avatar for agents (example: `/assets/profile.png`), defaults to no avatar

Running the VPS

Start the VPS and allow a minute for it to download and initiate all the services. Please note that the initial start may take longer, but subsequent launches will be quicker, with CMP becoming ready as soon as the VPS is running.

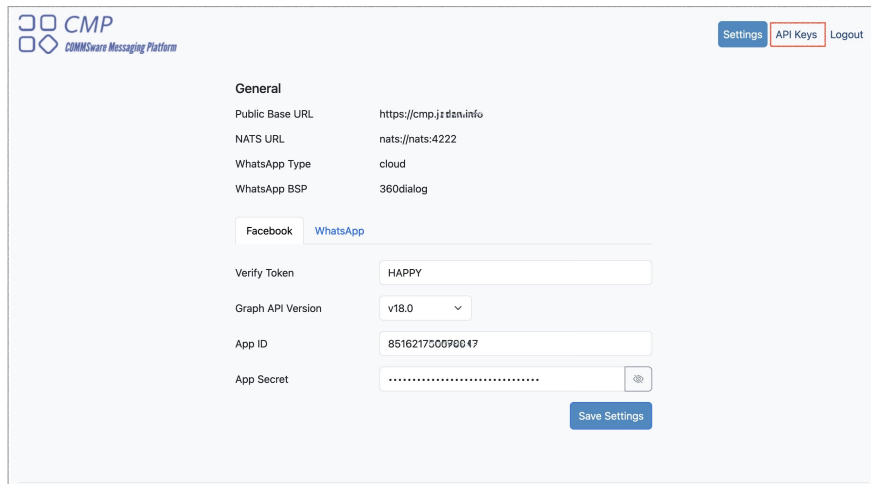


Figure 6. Running VPS

Managing the VPS

SSH access is essential for managing CMP services, performing updates, checking logs, and more.

CMP service

CMP is installed as a systemd service, which means it operates like any other service on your system. You can start, stop, restart, enable, disable, and check the status of the CMP service using standard systemd commands.

`systemctl status cmp.service`

```
● cmp.service - CMP Service with Docker Compose
   Loaded: loaded (/etc/systemd/system/cmp.service; enabled; vendor preset: enabled)
   Active: active (exited) since Tue 2024-04-16 10:49:48 UTC; 15s ago
     Process: 800 ExecStart=/usr/bin/docker compose -f compose.yaml -f compose.prod.yaml up -d --remove-orphans (code=exited, status=0/SUCCESS)
    Main PID: 800 (code=exited, status=0/SUCCESS)
      CPU: 380ms

Apr 16 10:49:39 localhost.localdomain docker[815]: Container cmp-nats-1 Started
Apr 16 10:49:39 localhost.localdomain docker[815]: Container cmp-sender-1 Starting
Apr 16 10:49:39 localhost.localdomain docker[815]: Container cmp-worker-1 Starting
Apr 16 10:49:39 localhost.localdomain docker[815]: Container cmp-core-1 Starting
Apr 16 10:49:42 localhost.localdomain docker[815]: Container cmp-sender-1 Started
Apr 16 10:49:45 localhost.localdomain docker[815]: Container cmp-core-1 Started
Apr 16 10:49:45 localhost.localdomain docker[815]: Container cmp-reverse-proxy-1 Starting
Apr 16 10:49:45 localhost.localdomain docker[815]: Container cmp-worker-1 Started
Apr 16 10:49:47 localhost.localdomain docker[815]: Container cmp-reverse-proxy-1 Started
Apr 16 10:49:48 localhost.localdomain systemd[1]: Finished CMP Service with Docker Compose.
```

Figure 7. CMP Service

Update

To manually update any or all CMP services, follow these steps:

1. Stop the service or all services.
2. Pull the image(s) containing the updates.
3. Start the service(s) again.

```
1 cd /cmp
2 docker compose -f compose.yaml -f compose.prod.yaml down
3 docker pull registry.bicomsystems.com/internal/cmp-core
4 docker pull registry.bicomsystems.com/internal/cmp-worker
5 docker pull registry.bicomsystems.com/internal/cmp-sender
6 docker compose -f compose.yaml -f compose.prod.yaml up -d
```

Figure 8. Manual Update

By following these steps, you can ensure that your CMP services are up to date with the latest changes and improvements.

Logs

To view logs for all CMP services, specify the same compose files and use the "logs" command. This command will display the logs for each service, allowing you to monitor their activity and troubleshoot any issues.

docker compose -f compose.yaml -f compose.prod.yaml logs

Additionally, you can access logs for a single service by specifying the service name along with the "logs" command.

docker compose -f compose.yaml -f compose.prod.yaml logs core

As all Docker Compose logs are directed to the journald on the host machine (configured in compose.prod.yaml), you can access these logs using the journalctl tool, just like any other journald logs. Simply specify the container name to retrieve the logs you need.

journalctl CONTAINER_NAME=cmp-worker-1 --since "1 hour ago" --no-pager

Configuring Channel Settings

To configure the settings for each channel, follow these steps using the provided web interface:

- Ensure your system is running with at least the core service active.
- Open a web browser and go to the settings page of your domain. The URL should be in the format: <http://yourdomain/settings>.
- You can enter and adjust the configuration data for each enabled channel on the settings page. Below are instructions for configuring Facebook and WhatsApp channels:

Facebook Integration

- Meta/Facebook Developer Account: You'll need a developer account with Meta/Facebook. Create one if you don't have it already.
- Meta/Facebook App and Page: Set up a Meta/Facebook app and associate it with a Facebook page.

WhatsApp Integration

- Choose API Implementation: Decide between two API implementations for WhatsApp, cloud, and on-premise before starting the services. Note that you can't change this without restarting.
- Meta Cloud API: For the Meta Cloud API, set up your Meta app following the instructions provided in the official documentation.

By following these steps, you'll be able to configure the settings for each channel using the web interface provided by the system.

4. Facebook Integration

In today's digital landscape, where consumers are more connected and empowered than ever before, businesses must adopt a holistic approach to engage with their audience across multiple channels seamlessly. One such channel that holds immense potential is Facebook, a platform that boasts billions of active users worldwide.

Integrating Facebook into an omni-channel strategy can be a game-changer for businesses looking to deepen their customer relationships and drive sustainable growth.

Prerequisites

System Requirements

Before proceeding with the integration of Facebook 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 Facebook 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:** Make sure that your PBXware system license includes the following components:
 1. **Agent Edition:** Ensure that a sufficient number of agent licenses are enabled to accommodate the expected workload for handling Facebook interactions.
 2. **Supervisors Edition:** Enable supervisor licenses to oversee and manage Facebook interactions within the omnichannel setup.
 3. **OmniChannel Module:** The OmniChannel module must be enabled within your license to support the integration of Facebook as a communication channel.



When agents or supervisors log in for the first time, they'll occupy a slot in the omnichannel module. Ensure you have the correct number of omnichannel modules to accommodate your team.

CMP Service

The COMMSware Messaging Platform (CMP) service is a bespoke solution designed to function as a proxy between your omnichannel system and meta-information related to messaging interactions.

The CMP service is a vital intermediary component within your omnichannel architecture, facilitating seamless communication and data exchange between the omnichannel system and various messaging platforms. It acts as a bridge, allowing your omnichannel system to efficiently manage and process messaging interactions while abstracting the complexities of handling meta-information associated with these interactions.

Integration with Omnichannel:

Integrating the CMP service into your omnichannel architecture enhances the interoperability and versatility of your messaging capabilities. By acting as a dedicated proxy for managing meta-information, the CMP service enables your omnichannel system to focus on core functionalities, such as message processing, routing, and orchestration, without the overhead of dealing with intricate messaging details.



One of the main prerequisites for integrating Facebook into your omnichannel system is the COMMSware Messaging Platform (CMP) service.

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.

Facebook Integration Requirements

Facebook Account

To create a Facebook account, visit the Facebook website (<https://facebook.com>) and follow the account creation process.

Access to an active Facebook account is essential alongside obtaining or creating a Meta developer account when integrating Facebook into the omnichannel system.



Please note that due to Facebook policies targeting fake profiles with false information and images, newly created accounts are at risk of being banned. This may affect your ability to integrate Facebook with Omnichannel services. We recommend using real information when setting up your Facebook account to avoid any issues with integration.

Facebook Business Account

Before you can create a Meta app, it's necessary to sign up for a Facebook Business account in Business Manager. To create a Facebook business account go to the Business Manager website at <https://business.facebook.com>.

Please be aware that your Facebook Business account needs to be verified. For more detailed information on how to verify your Facebook Business account, please visit their official website. (<https://www.facebook.com/business/help/1095661473946872?id=180505742745347>)

Meta Developer Account

Similarly, access to a Meta developer account is necessary to manage the technical aspects of integrating Facebook into the omnichannel.

To begin the process of setting up your Meta developer account go to the facebook developer website (<https://developer.facebook.com>) and log in with your active facebook account credentials.

Create Meta App

Since you have already created a business account and registered on Meta for developers, you can create a Meta application within the Meta platform. Please visit (<https://developers.facebook.com/docs/development>) and follow the instructions.



Please note that to engage with all users on Facebook and ensure a fully functional application, it's necessary to request additional permissions and undergo an application review.

Facebook Integration Working Logic

This diagram illustrates the flow of logic for Facebook integration, depicting the path from customer requests (shown by red lines) to agent responses (shown by blue lines).

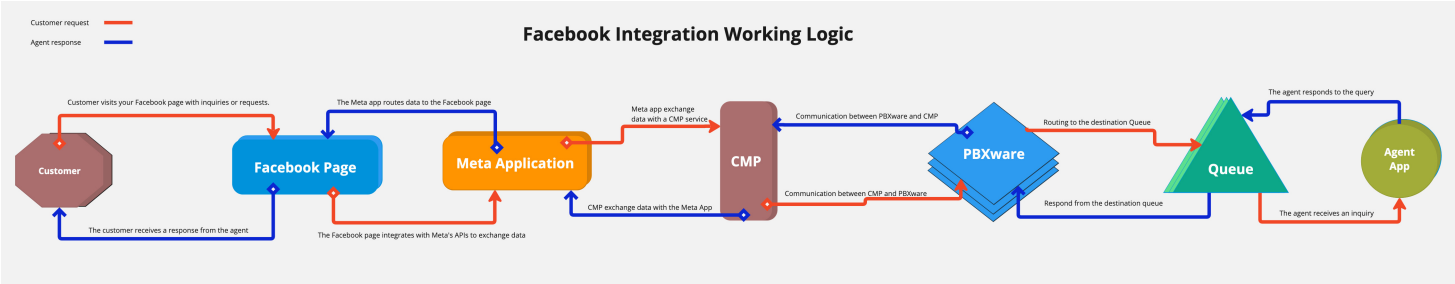


Figure 9. Facebook Integration Working Logic

5. 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.

Prerequisites

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 Facebook 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:** Make sure that your PBXware system license includes the following components:
 1. **Agent Edition:** Ensure that a sufficient number of agent licenses are enabled to accommodate the expected workload for handling Facebook interactions.(For example: 5)
 2. **Supervisors Edition:** Enable supervisor licenses to oversee and manage Facebook interactions within the omnichannel setup.(For Example: 3)
 3. **OmniChannel Module:** The OmniChannel module must be enabled within your license to support the integration of Facebook as a communication channel. (You'll need eight omnichannel modules, comprising 5 for the agent edition and 3 for the supervisor edition.)



When agents or supervisors log in for the first time, they'll occupy a slot in the omnichannel module. Ensure you have the correct number of omnichannel modules to accommodate your team.

CMP Service

The COMMSware Messaging Platform (CMP) service is a bespoke solution designed to function as a proxy between your omnichannel system and meta-information related to messaging interactions.

The CMP service is a vital intermediary component within your omnichannel architecture, facilitating seamless communication and data exchange between the omnichannel system and various messaging platforms. It acts as a bridge, allowing your omnichannel system to efficiently manage and process messaging interactions while abstracting the complexities of handling meta-information associated with these interactions.

Integration with Omnichannel:

Integrating the CMP service into your omnichannel architecture enhances the interoperability and versatility of your messaging capabilities. By acting as a dedicated proxy for managing meta-information, the CMP service enables your omnichannel system to focus on core functionalities, such as message processing, routing, and orchestration, without the overhead of dealing with intricate messaging details.



One of the main prerequisites for integrating WhatsApp into your omnichannel system is the COMMSware Messaging Platform (CMP) service.

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

To successfully integrate WhatsApp into your omnichannel strategy, you'll need to ensure you have the following prerequisites:

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 Facebook Developers documentation under the "Phone Numbers" section.

Facebook Account with a Business Manager

To create a new business page or manage an existing one, please visit (https://www.facebook.com/help/104002523024878/?helpref=popular_articles) for more instructions.

An active Facebook account with a business manager is essential for WhatsApp integration. By fulfilling the requirements of having access to your Facebook and Business Facebook Page, you'll be well-equipped to integrate WhatsApp into the omnichannel and enhance customer engagement across channels.

360Dialog WhatsApp Partner Account

Creating a WhatsApp Partner Account involves communication with a third party, such as 360Dialog. The first step in acquiring the 360Dialog Partner Account is to contact our Bicomsystems Account Managers, who will guide you through the process, including the requirements and specific steps needed to create your 360Dialog WhatsApp Partner Account. Afterward, you will receive all necessary information regarding the partner account, payment method, and CMP settings.



For further details on accessing your 360Dialog account, please contact our Bicomsystems Account Managers.

WhatsApp Integration Working Logic

This diagram illustrates the flow of logic for WhatsApp integration, depicting the path from customer requests (shown by red lines) to agent responses (shown by blue lines).

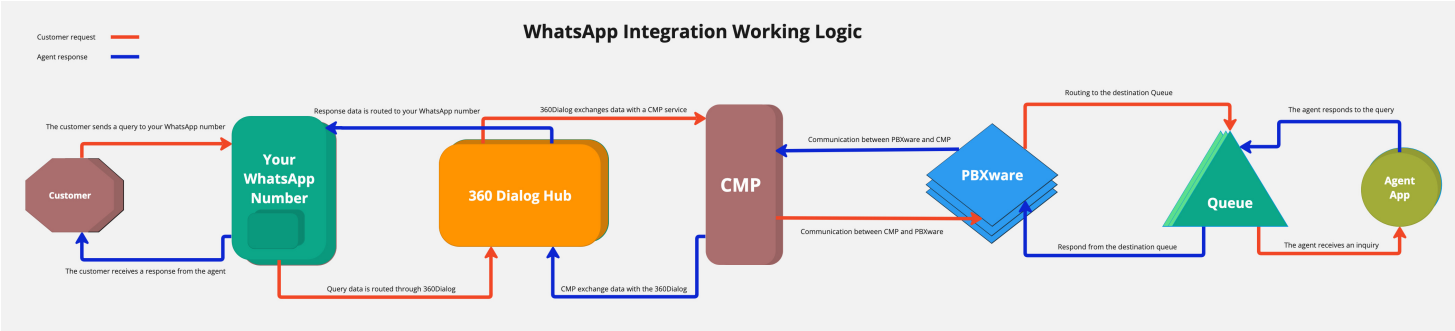


Figure 10. WhatsApp Integration Working Logic

6. Facebook Business Account

Before you can create a Facebook app, it's necessary to sign up for a Facebook Business Account in Business Manager.

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

- **Visit Business Manager:** Go to the Business Manager website at <https://business.facebook.com>
- **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.

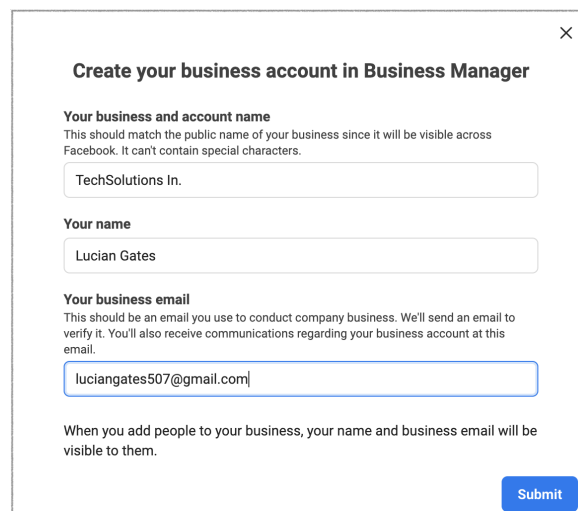
A screenshot of a web form titled "Create your business account in Business Manager". The form has a close button (X) in the top right corner. It contains three main sections: "Your business and account name" with a text input field containing "TechSolutions In.", "Your name" with a text input field containing "Lucian Gates", and "Your business email" with a text input field containing "luciangates507@gmail.com". Below the email field is a note: "When you add people to your business, your name and business email will be visible to them." At the bottom right is a blue "Submit" button.

Figure 11. Create An Account

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

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

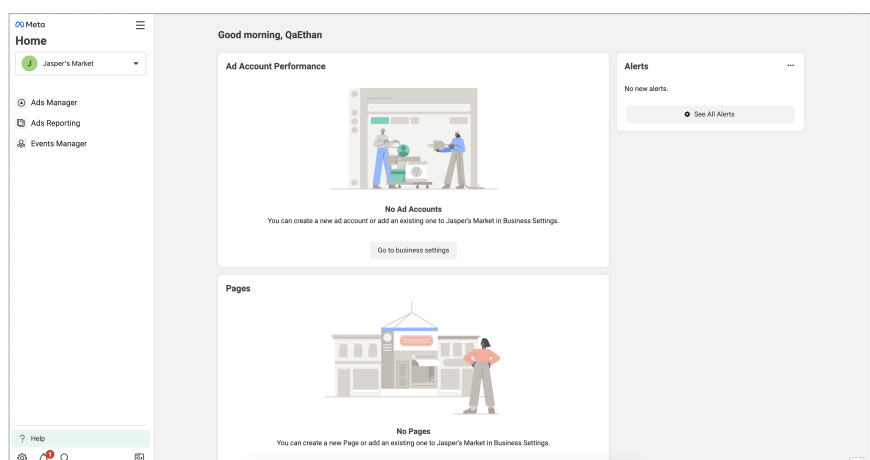


Figure 12. Business Account Home Page

Now, it's time to create a Facebook page for your business account.

Navigate to the Settings >> Accounts and locate the option to add pages.

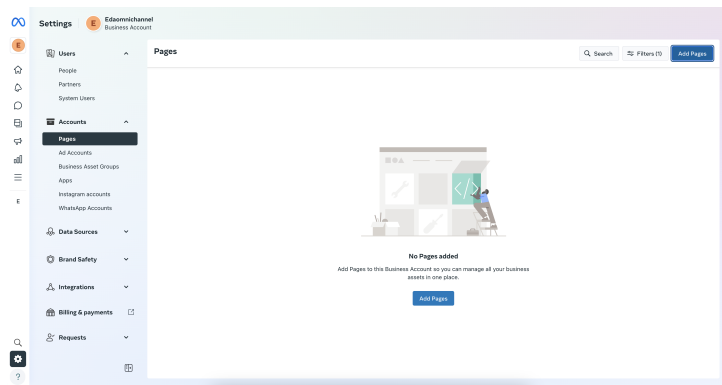


Figure 13. Add Facebook Page

In the following window, choose the option "Create a new Facebook page."

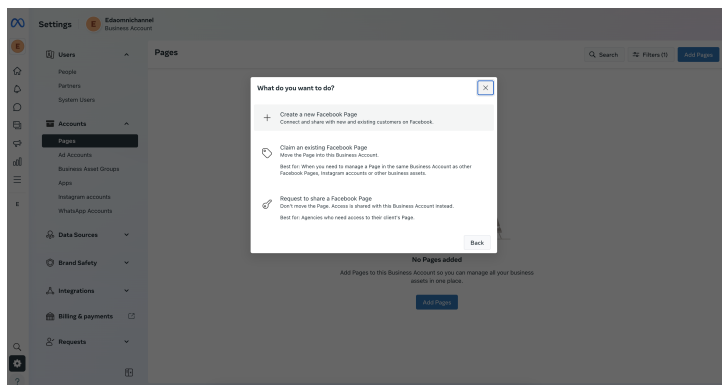


Figure 14. Add Facebook Page

In the subsequent window, input your page information and then proceed by clicking on "Next."

Create Facebook Page

Details

Confirm

Done

How do you want to describe the Page?
Connect and share with new and existing customers on Facebook.

Page name
Use the name of your business, brand or organization, or a name that explains what the Page is about. [Learn More](#)

TechSolution Corp.

Category
Choose a category that describes what type of business, organization or topic the Page represents. You can add up to 3.

Information Technology Company

Bio - Optional
Write about what your business does, the services you provide, or the purpose of the Page.

TechSolution Corp. is a cutting-edge technology company specializing in innovative solutions. 93/100

Cancel Next

Figure 15. Facebook Page Info

Read and agree to Meta's terms of service and the policies regarding Pages, groups, and events on behalf of your Business Account.

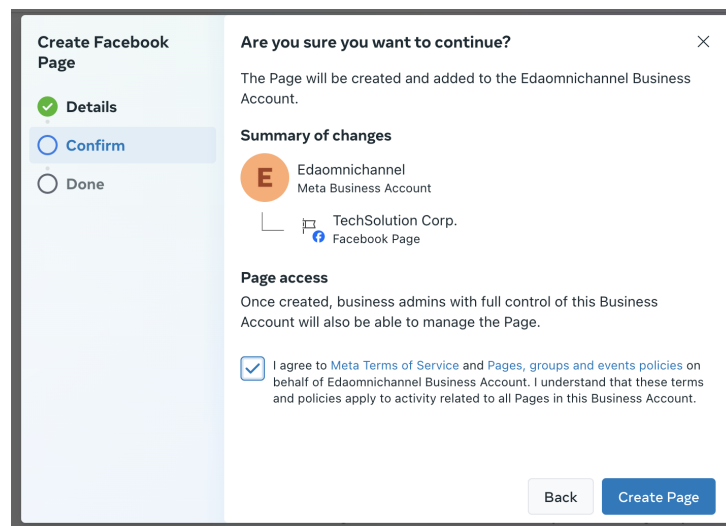


Figure 16. Meta Terms

Click on the "Create Page" button, and then on the next slide, click on the "Done" button to complete the Facebook page creation process.

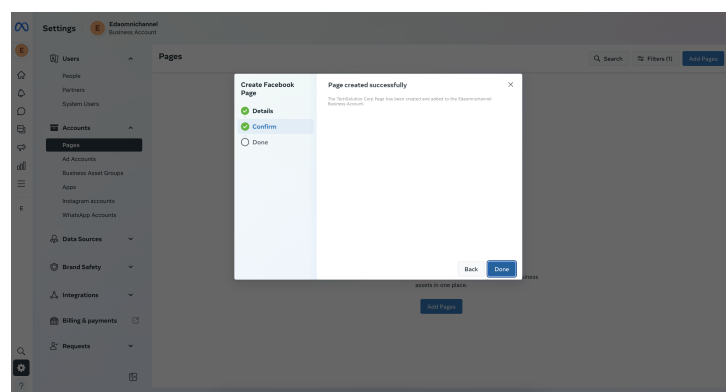


Figure 17. Completed Process

It's important to note that your Facebook Business account requires verification. Verifying your Facebook Business account establishes trust, unlocks additional features, and safeguards your online presence, all of which contribute to the overall success and reputation of your business. For detailed instructions on verifying your Facebook Business account, please refer to their official website. (<https://www.facebook.com/business/help/1095661473946872?id=180505742745347>)

7. Meta Developer Account

Access to a Facebook Developer Account is necessary to manage the technical aspects of integrating Facebook into the omnichannel.

To begin the process of setting up your Facebook Developer Account, follow these steps:

Visit Facebook Developer Page

Go to the Facebook Developer website (<https://developer.facebook.com>) and log in with your active Facebook account credentials.

Locate the 'Get Started' button on the top of the page, and click on this button to initiate the registration process.

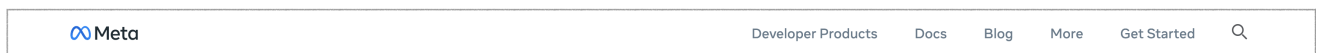


Figure 18. Meta Get Started

Register with Facebook Meta for Development

After clicking 'Get Started,' you will be directed to register with Facebook Meta for development purposes. Select the 'Continue' option to proceed.

Provide Email Address

You will be prompted to provide an email address. Enter your email account and click on the checkbox to read and agree to the terms. Then, click on the 'Continue' button to proceed with the registration process.

A composite image showing two steps of the Facebook Developer account creation process. Step 1, titled 'Create a Meta for Developers account', shows a 'Welcome to Meta for Developers' screen with a 'Continue' button. Step 2, also titled 'Create a Meta for Developers account', shows the 'Enter Your Preferred Contact Email' screen with a text input field for the email, a checkbox for agreeing to terms, and a 'Send Verification Email' button.

Figure 19. Email Address

Verification Email

Upon completing the previous step, click on the "Send verification email" button. This will trigger an email containing a verification code to be sent to the provided email address.

Enter Verification Code

Check your email inbox for the verification email. It should contain a code similar to the one depicted in the image below:

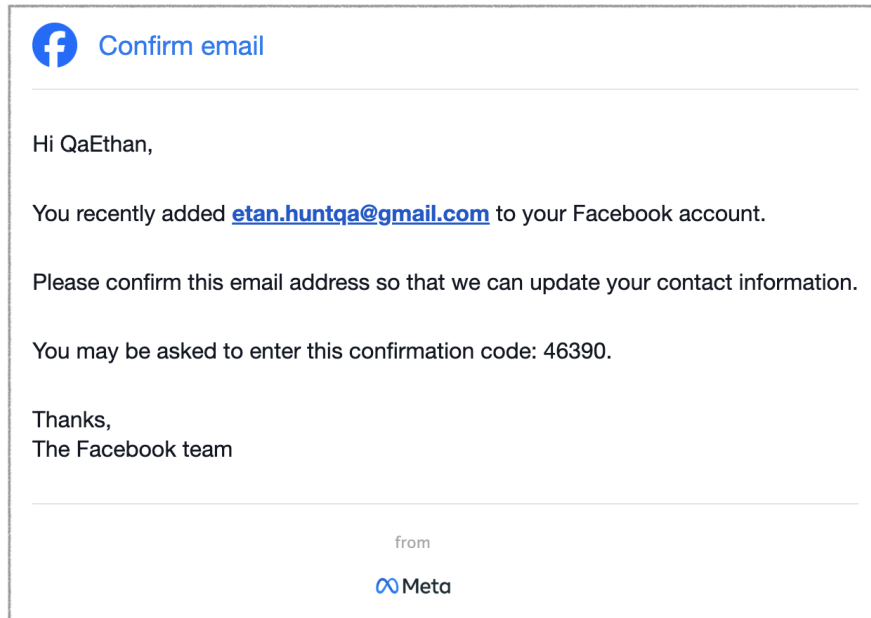


Figure 20. Email Address Verification

Enter Verification Code: Enter the verification code from the email into the corresponding field on the Facebook Developer website and click on the 'Continue' button to complete the verification process.

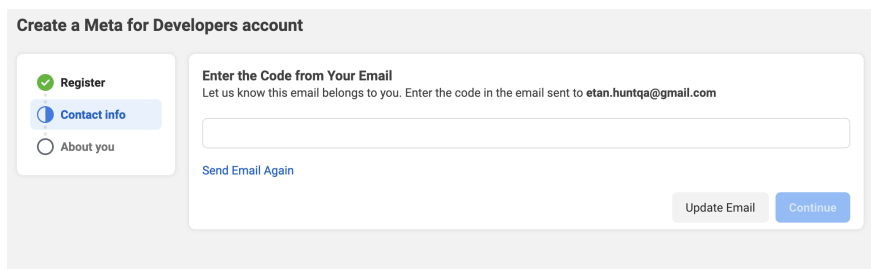


Figure 21. Email Address Verification

After entering the verification code, you'll need to provide additional information about yourself and click the "Complete Registration" button to finalize the registration process.

The screenshot shows the 'Create a Meta for Developers account' registration page. On the left, there are three steps: 'Register' (checked), 'Contact info' (checked), and 'About you' (active). The main section is titled 'Which of the following best describes you?' with the subtext 'Help us improve your experience by telling us which of the following roles best describe you.' Below this, there are seven role options, each with an icon and a radio button: Developer (code icon), Marketer (megaphone icon), Analyst (bar chart icon), Product manager (briefcase icon), Student (graduation cap icon), Owner/founder (group of people icon), and Other (person icon). A 'Complete Registration' button is at the bottom right.

Figure 22. Additional Info

Once registration is complete, you'll be redirected to the main page of the Facebook Developer site, and from there you can create a new facebook app. The creation process for the new Facebook app will be outlined in subsequent sections of the document.

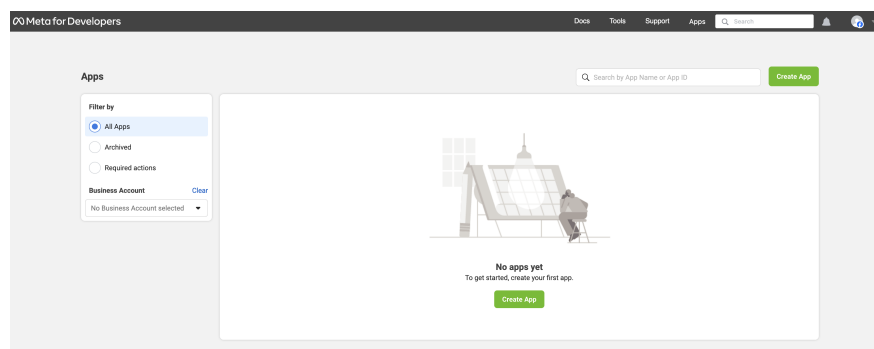


Figure 23. Meta Landing Page

Alternatively, there is an option to join an existing Meta project. An administrator will send you a notification requesting confirmation of your participation, and upon confirmation, you will be able to join the existing Meta project.

8. Create Facebook App

Since you have already created a business account and registered on Meta for developers, you can create a Facebook application within the Meta platform.

Login to your personal Facebook account, then navigate to <https://developers.facebook.com/> and click on the "My Apps" item in the top menu.



Figure 24. Meta My Apps

To begin creating your app on the Facebook developer panel, start by clicking on "Create App". In the subsequent window, opt for the "Other" option as the other two choices are not suitable. Next, select the "Business" type in the creation screen, then click "Next".

Fill in the required fields for "Display name" and "App contact email", and proceed by clicking "Create app". Finally, complete the process by submitting your Facebook password when prompted.

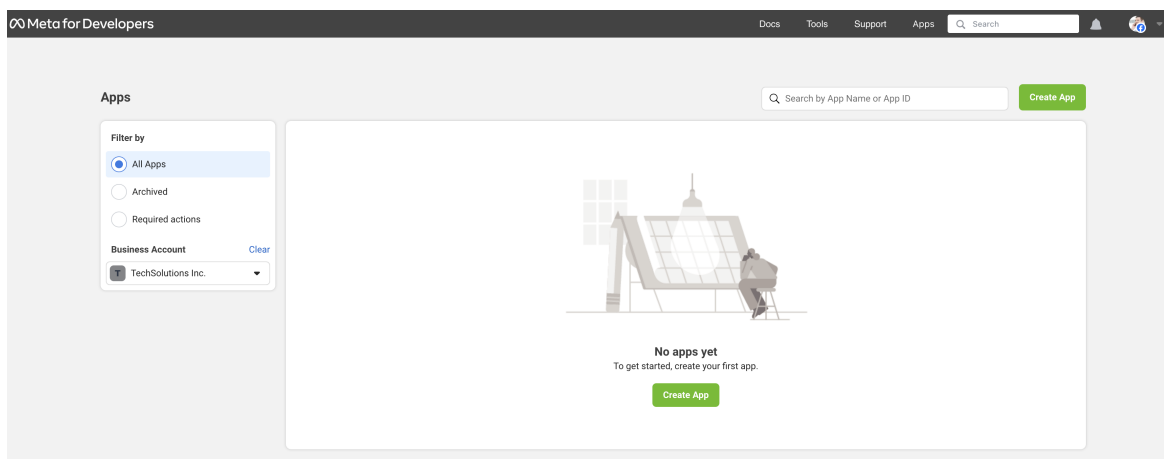


Figure 25. Create New App

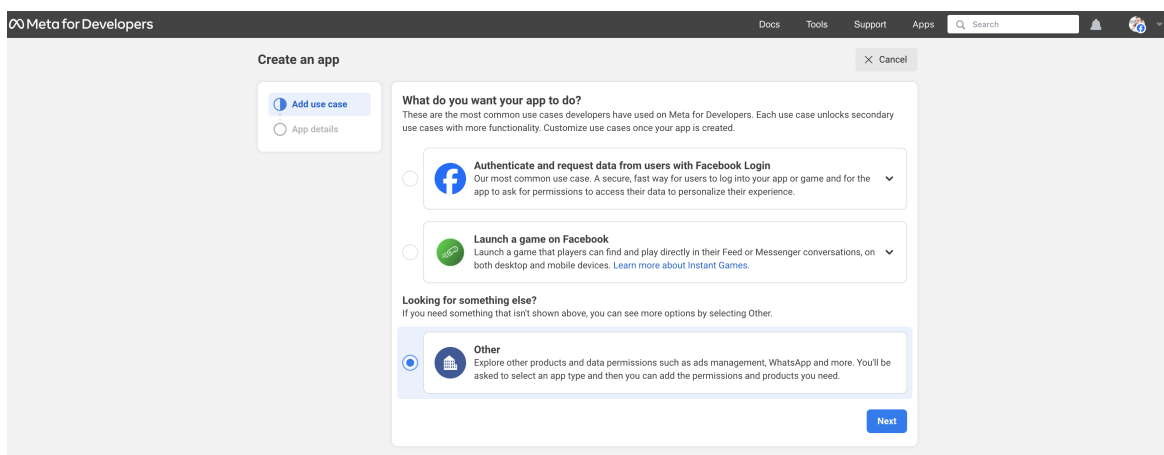


Figure 26. Select Other

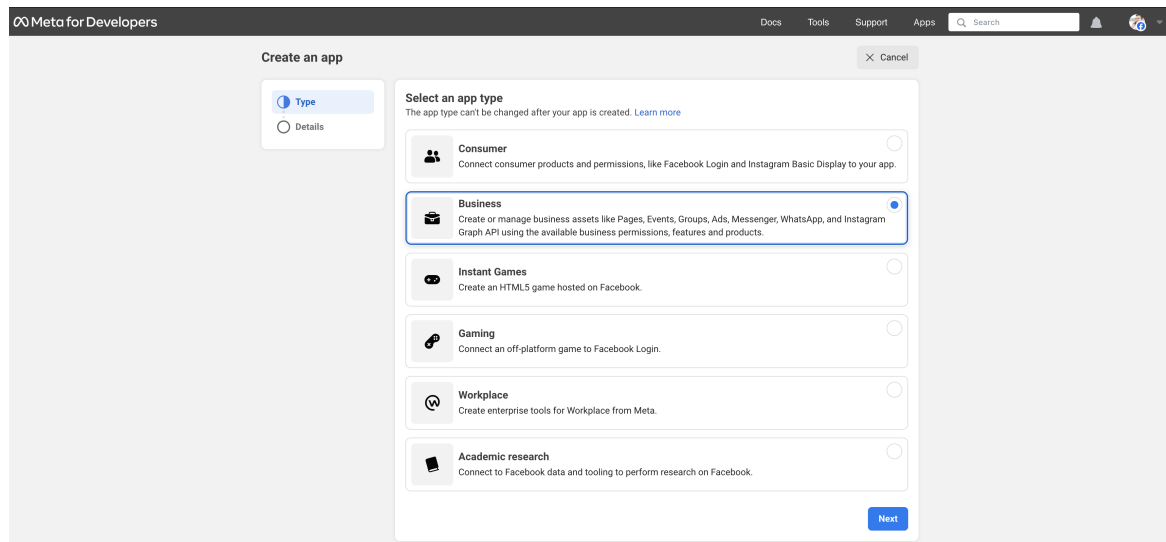


Figure 27. Select Application Type

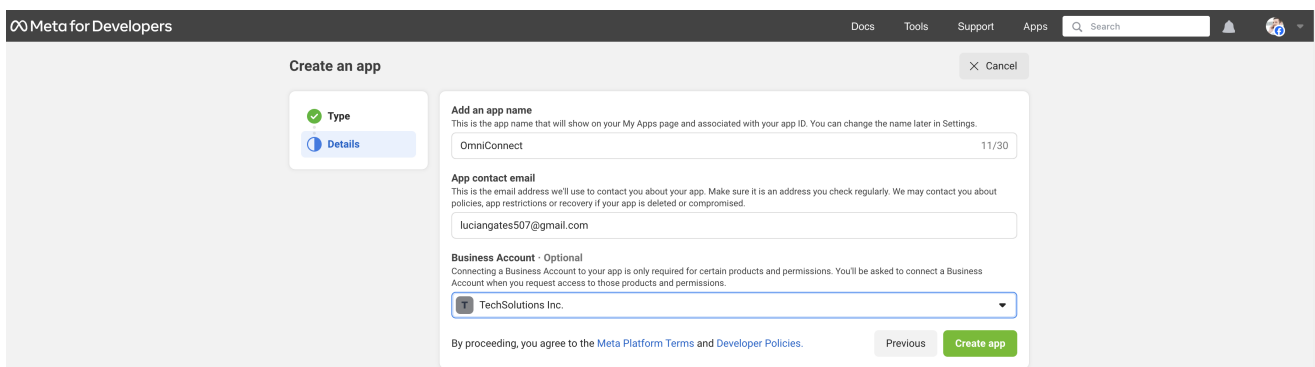


Figure 28. Enter App Info

Once you've entered the data, you can click on the "Create App" button.

Now, you should be redirected to your app's dashboard.

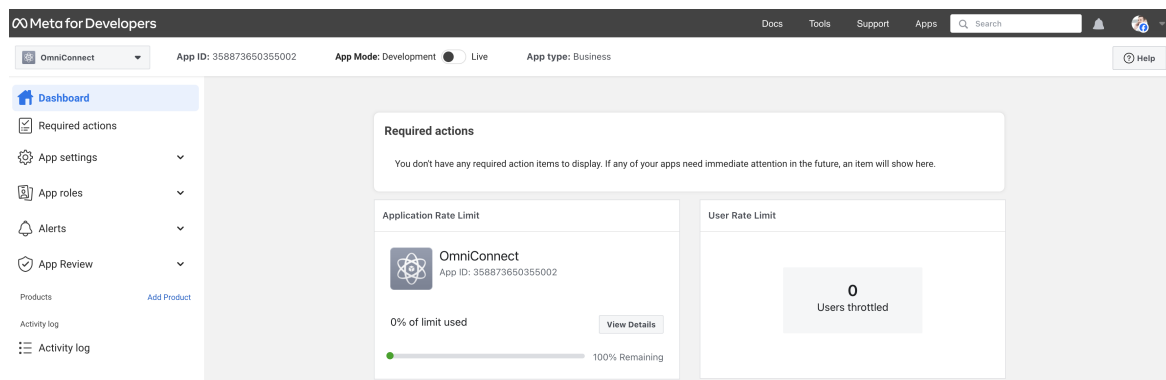


Figure 29. App Dashboard

Adding Products - Messenger

On the dashboard, scroll down to the 'Add products' section. Find the 'Messenger' product and click on 'Set up'.

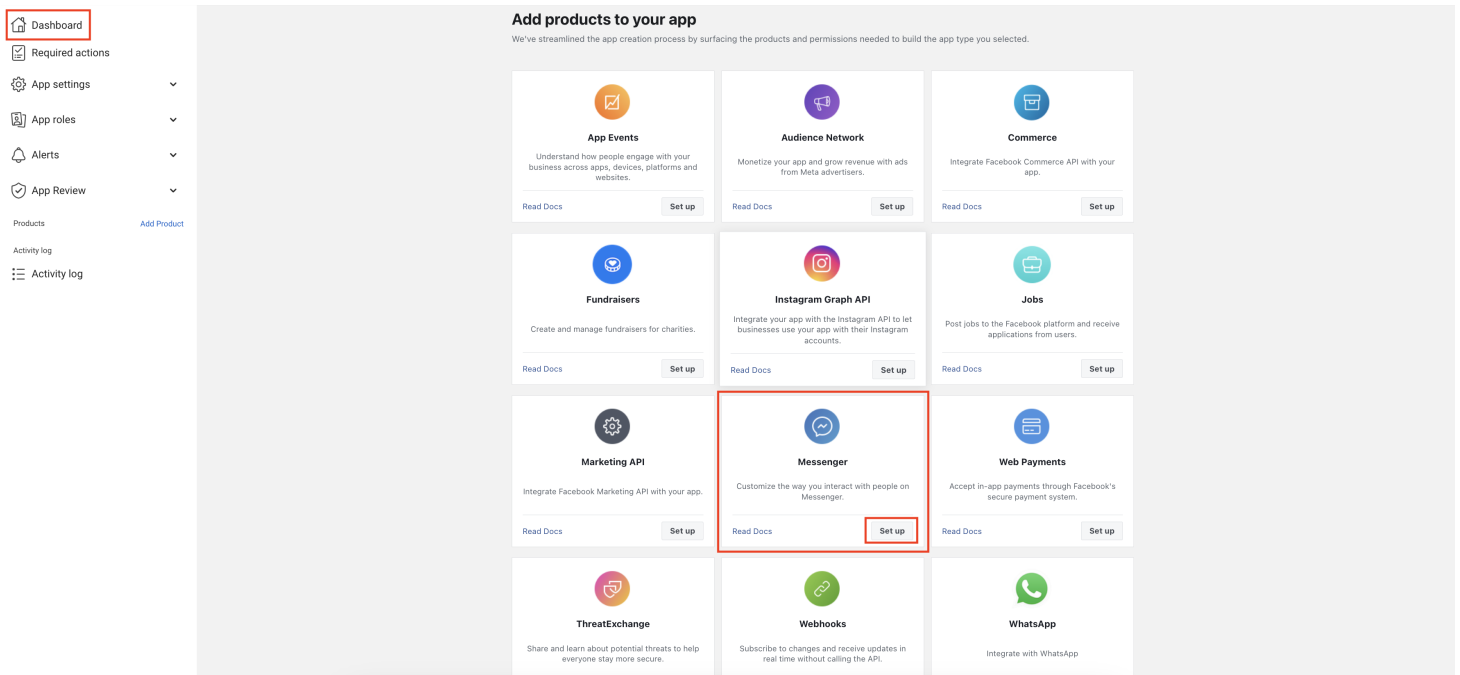


Figure 30. Adding Products

By doing this, you are adding the Messenger product to your app. There is no need to configure webhooks, as the CMP service will handle this automatically. The next step is to add the Facebook Login for Business product.

Adding Products - Facebook Login for Business

To add the "Facebook Login for Business" product to your Facebook app, go to your app dashboard, find "Facebook Login for Business," and click "Set Up."

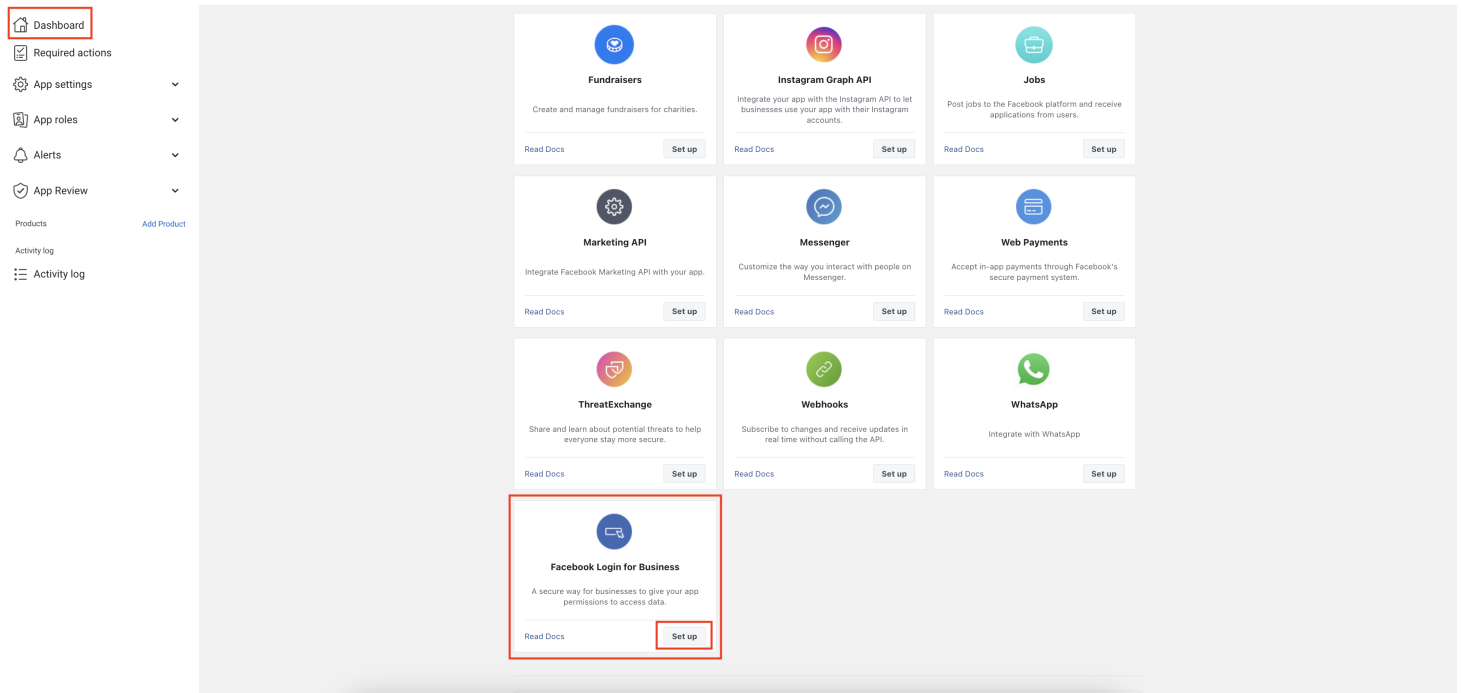


Figure 31. Adding Products

The following step is to go to Facebook Login for Business and choose the Settings tab. In this window, make sure to activate the options for 'Web OAuth login', 'Enforce HTTPS', 'Embedded Browser OAuth Login', 'Use strict mode for redirect URLs', and 'Login with JavaScript SDK' (please consult the image).

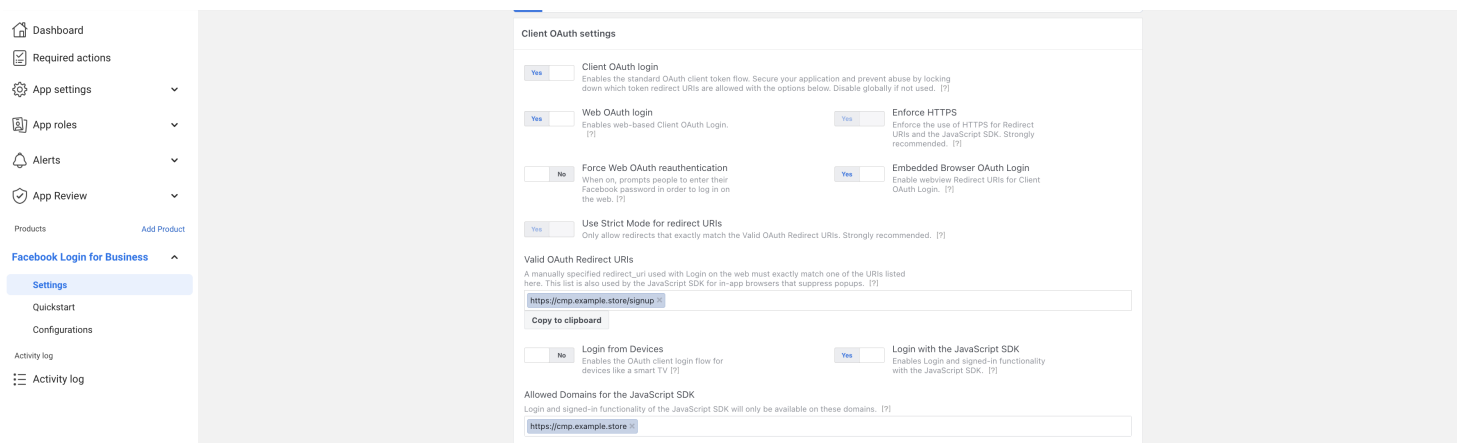


Figure 32. Facebook Login Settings

Insert the URL of your CMP service into the fields for 'Valid OAuth Redirect URLs'(i.e <https://cmp.example.store/signup>) and 'Allowed Domains for the JavaScript SDK'. Once configuring these fields, click the 'Save Changes' button.

Ensure to replace "cmp.example.store" with the actual URL of your CMP installation. Failure to update this URL will result in a Facebook error when attempting to connect pages with your CMP. The error message will state: "Can't load URL: The domain of this URL isn't included in the app's domains. To be able to load this URL, add all domains and sub-domains of your app to the App Domains field in your app settings."

There is also no need to configure access tokens for the Messenger, as the CMP service will handle this automatically.



Once you've successfully configured your application, you can attempt to send a message to your Facebook page. At this point, you can only interact with users who have permission to manage your page. If you wish to interact with all other users and have a fully functional application, you'll need to request additional permissions and undergo an application review, as outlined here. (https://developers.facebook.com/apps/1478928062704338/app-review/submissions/?business_id=1057272931003686)

9. Connect CMP Service with Facebook and WhatsApp

Configuring specific options within our CMP service is crucial before setting up configurations between the CMP service and the PBXware system. These settings are essential for Facebook and WhatsApp integration and are necessary for everything to work correctly and for the integration to be successful.

Configure CMP Settings for Facebook App

Setting up integration with Facebook is quite straightforward if you've completed creating a Facebook account, a Meta account, and a Facebook application.

The first step is to navigate to your Facebook App Settings, choose the Basic tab, and retrieve the App ID and App Secret information.

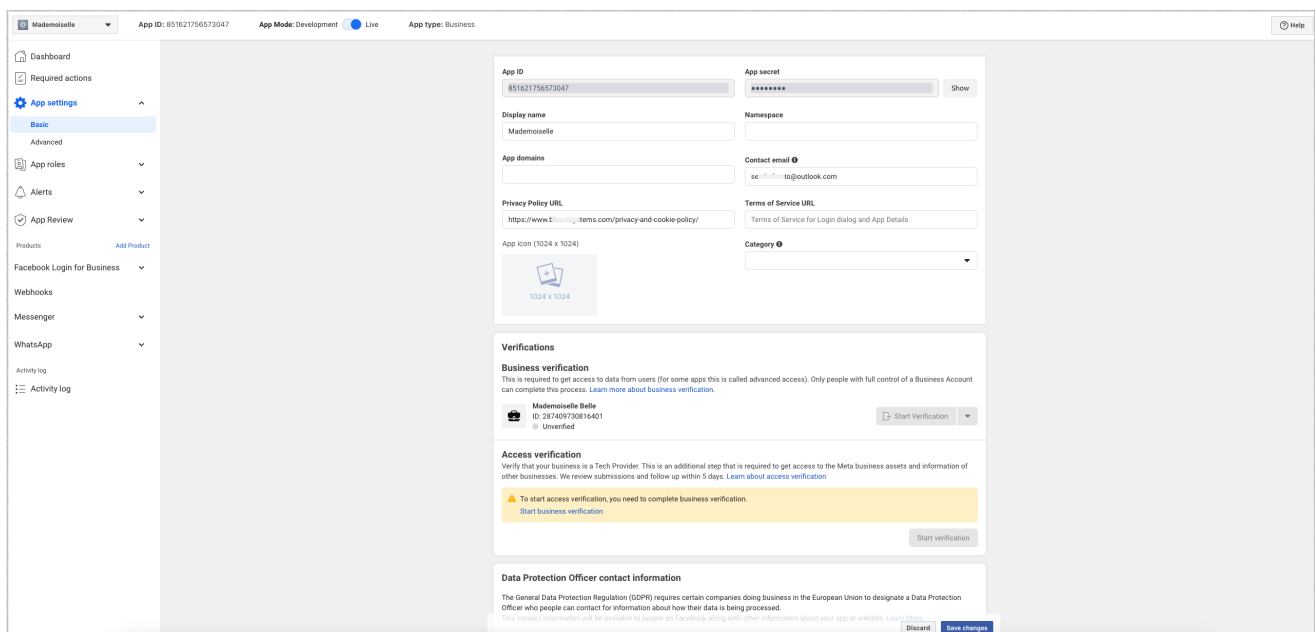


Figure 33. Facebook App Settings

Now, paste the App ID and App Secret from your Facebook application to your CMP service.

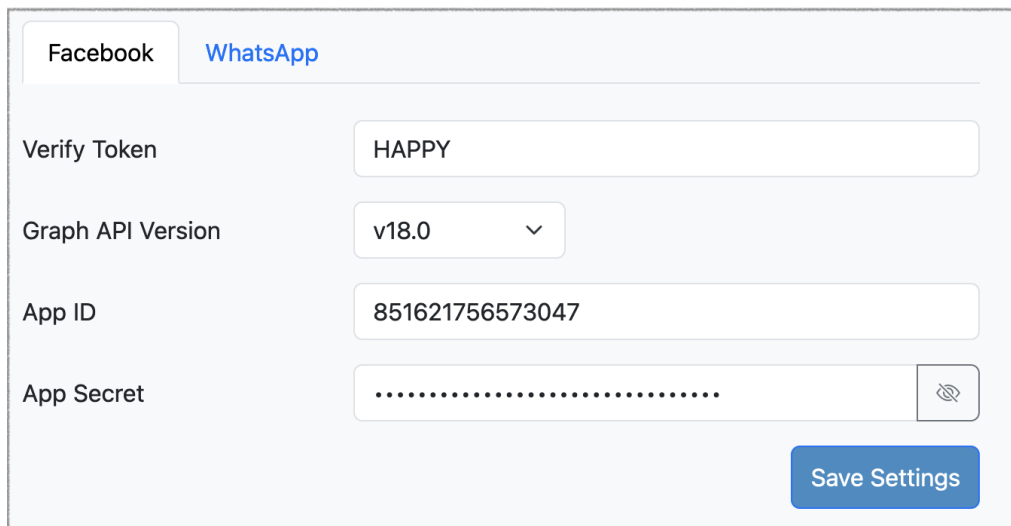
The screenshot shows the 'Facebook' tab selected in the settings interface. It contains four input fields: 'Verify Token' with the value 'HAPPY', 'Graph API Version' with a dropdown menu showing 'v18.0', 'App ID' with the value '851621756573047', and 'App Secret' with a masked password. A 'Save Settings' button is located at the bottom right.

Figure 34. CMP Facebook Settings

Additionally, include a verification token of your choice for setting up the webhook on Facebook. After filling in these details, click the "Save Settings" button.



The verification token will be automatically generated, but you can edit it if you choose.

Configure CMP Settings for WhatsApp

If you have followed the steps to create a 360Dialog partner account, you should have received all the necessary information to enter into the CMP settings for WhatsApp integration.

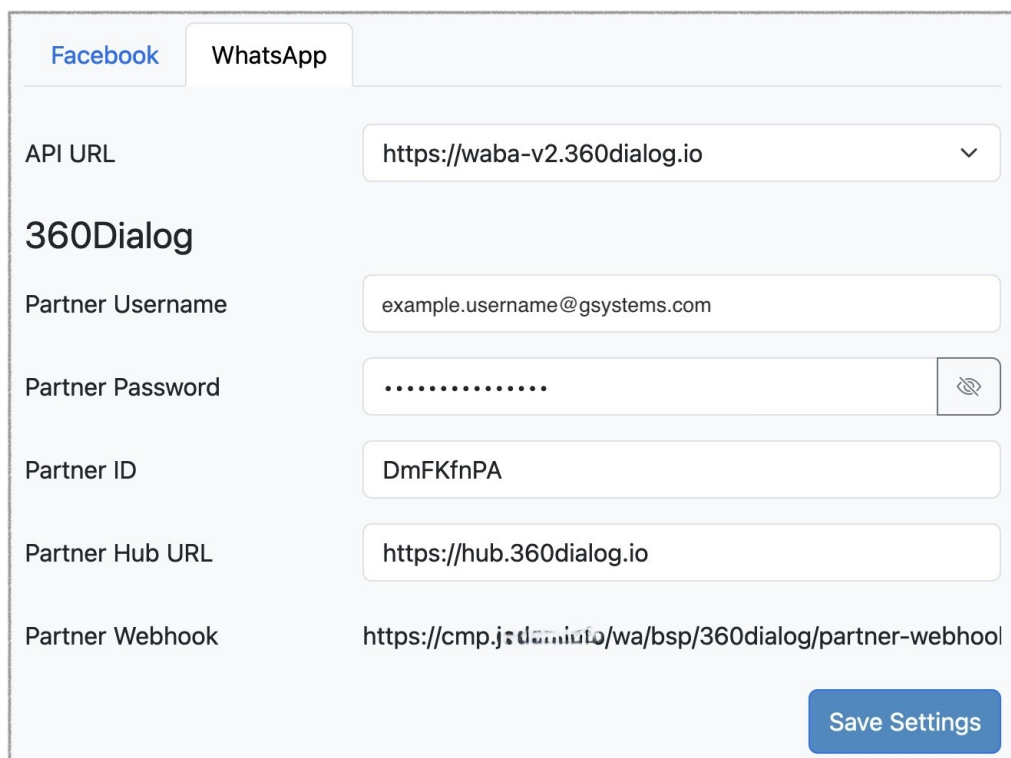
The screenshot shows the 'WhatsApp' tab selected in the settings interface. It contains six input fields: 'API URL' with a dropdown menu showing 'https://waba-v2.360dialog.io', '360Dialog' as a section header, 'Partner Username' with the value 'example.username@gsystems.com', 'Partner Password' with a masked password, 'Partner ID' with the value 'DmFKfnPA', 'Partner Hub URL' with the value 'https://hub.360dialog.io', and 'Partner Webhook' with the value 'https://cmp.jsdemo.io/wa/bsp/360dialog/partner-webhook'. A 'Save Settings' button is located at the bottom right.

Figure 35. CMP WhatsApp Settings

You must input four fields: partner username, password, partner ID, and Hub URL. The first and last

options (API URL and Partner Webhook) are generated automatically.

10. 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.

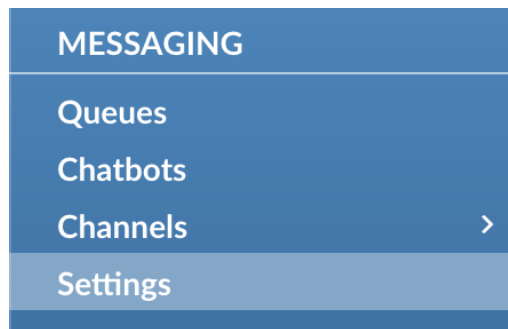


Figure 36. Pbxware Settings

Scroll down to the bottom of the page to locate the CMP section to connect your PBXware system with your CMP service. Provide the domain of your service, add the API key, and click the "Save" button.

A screenshot of a form titled "CMP" in a light gray box. The form contains four fields: "URL:" with the value "https://cmp.jasas.info", "API Key:" with the value "cmp_fBevTTlgp6yePZer9Q4UBZMEDhZ9Fu8nSbMOyKn0FpnfxSYD1A", "Allowed IP Addresses:" which is empty, and "Profile ID:" with the value "42f6679e-9763-4c0c-8186-652490a0dcce".

Figure 37. Omnichannel CMP Settings

11. Adding the Facebook 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.

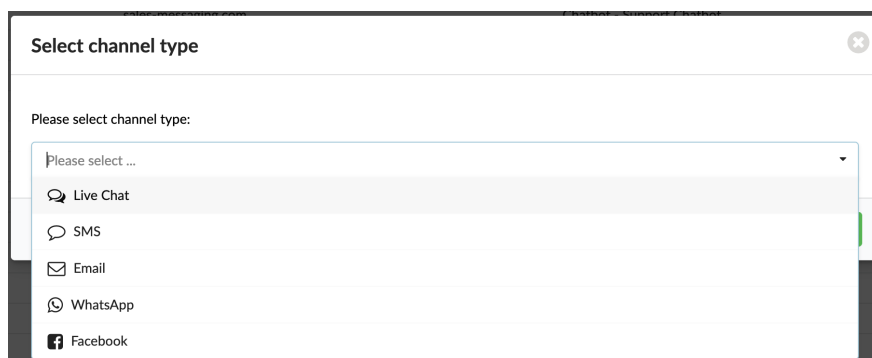


Figure 38. Channel Type

Channel Type

To begin the process of creating a Facebook channel, select the Facebook channel type.

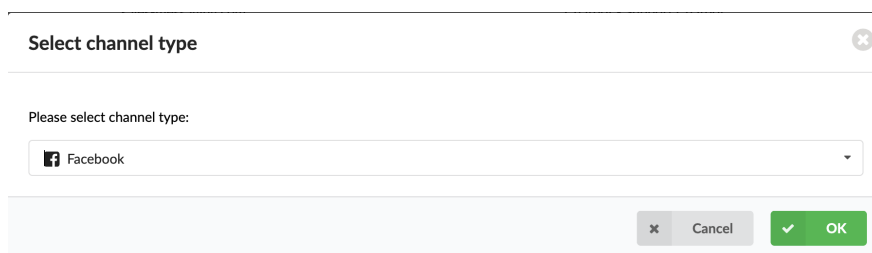


Figure 39. Facebook Channel Type

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

Setting Up Your Facebook Channel

After confirming the creation of your facebook channel, you'll be directed to the next window.

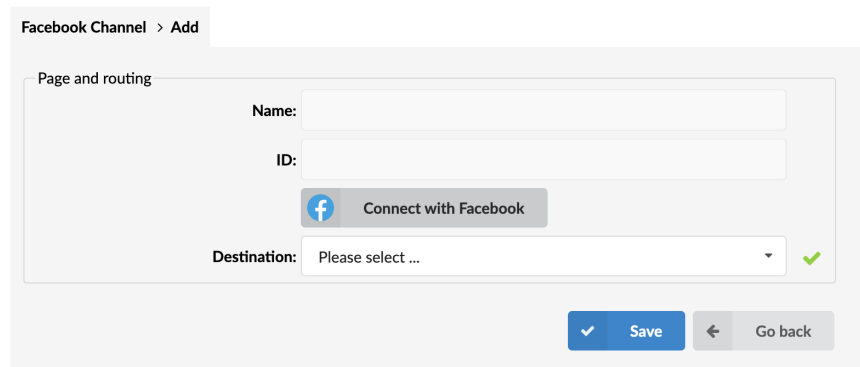
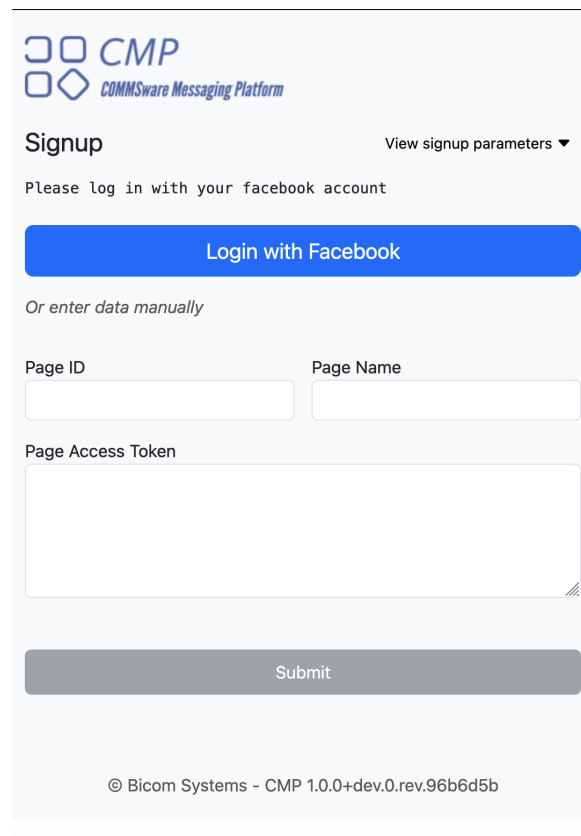
The screenshot shows a web form titled "Facebook Channel > Add". Inside the form, there is a section labeled "Page and routing". This section contains three input fields: "Name:" and "ID:" are text boxes, and "Destination:" is a dropdown menu with the text "Please select ...". To the right of the "Destination:" dropdown is a green checkmark icon. Below the "Name:" and "ID:" fields is a button with a Facebook logo and the text "Connect with Facebook". At the bottom right of the form are two buttons: a blue "Save" button with a checkmark icon and a grey "Go back" button with a left arrow icon.

Figure 40. Setting Up Facebook Channel

- The first two options (Name and ID) cannot be edited; they will automatically populate once you connect your Facebook account.
- The "Connect with Facebook" button allows you to link your Facebook account with the system, enabling integration of the Facebook channel.
- The Destination field enables you to select a messaging queue to handle queries received via the Facebook channel.

Setting Up CMP and Connect With Facebook

When you click the "Connect with Facebook" button, a new CMP window will appear, prompting you to connect via your Facebook account.

The image shows a web form titled "CMP COMMSware Messaging Platform" with a "Signup" header. It includes a "View signup parameters" link, a prompt to log in with a Facebook account, a blue "Login with Facebook" button, and an option to "Or enter data manually". Below this are input fields for "Page ID", "Page Name", and "Page Access Token", followed by a grey "Submit" button. The footer contains the copyright notice "© Bicom Systems - CMP 1.0.0+dev.0.rev.96b6d5b".

Signup [View signup parameters ▼](#)

Please log in with your facebook account

Login with Facebook

Or enter data manually

Page ID

Page Name

Page Access Token

Submit

© Bicom Systems - CMP 1.0.0+dev.0.rev.96b6d5b

Figure 41. Setting Up CMP

Simply continue by clicking the "Login with Facebook" button on this window.



There's no need to manually add information such as 'Page ID', 'Page Name', or 'Page Access Token', as these fields will be automatically populated once you connect with your Facebook account.

You'll encounter a new window where you'll need to log in with your Facebook account.

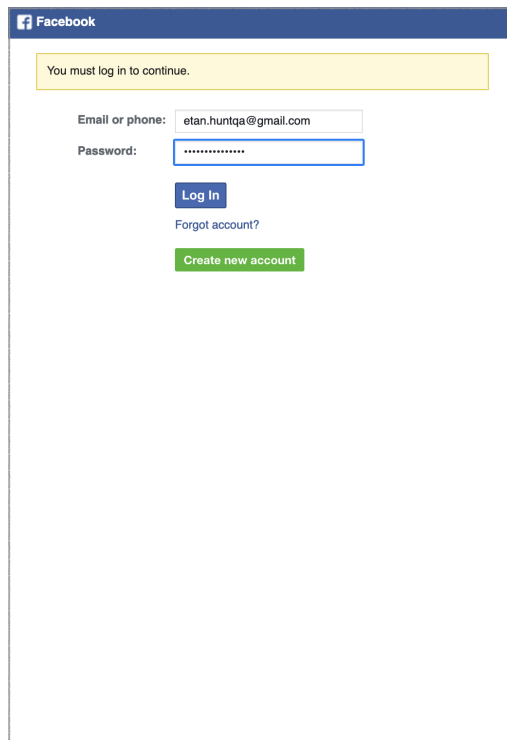
The image shows the Facebook login interface. At the top, there's a blue header with the Facebook logo and the word "Facebook". Below this, a yellow box contains the text "You must log in to continue." The main area has two input fields: "Email or phone:" with the value "etan.huntqa@gmail.com" and "Password:" with a masked password "*****". Below these fields are three buttons: a blue "Log In" button, a blue link "Forgot account?", and a green "Create new account" button.

Figure 42. Login with Facebook

Once logged in, the next window will prompt you to link your Facebook account with the Meta project you were previously added to. Click on "Continue" to proceed:

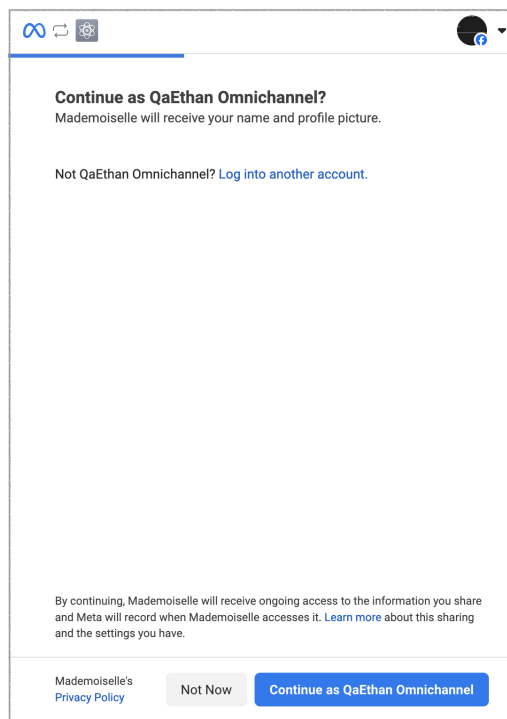
The image shows a Facebook authorization screen. At the top, there's a blue header with the Facebook logo and the word "Facebook". Below this, the text "Continue as QaEthan Omnichannel?" is displayed, followed by "Mademoiselle will receive your name and profile picture." Below this, there's a link "Not QaEthan Omnichannel? Log into another account." At the bottom, there's a section with the text "By continuing, Mademoiselle will receive ongoing access to the information you share and Meta will record when Mademoiselle accesses it. Learn more about this sharing and the settings you have." Below this text are three buttons: a link "Mademoiselle's Privacy Policy", a grey "Not Now" button, and a blue "Continue as QaEthan Omnichannel" button.

Figure 43. Login with Facebook

Next, you'll be asked to add the page or pages that the Meta project will have access to. Select the relevant pages and click on "Continue" to proceed:

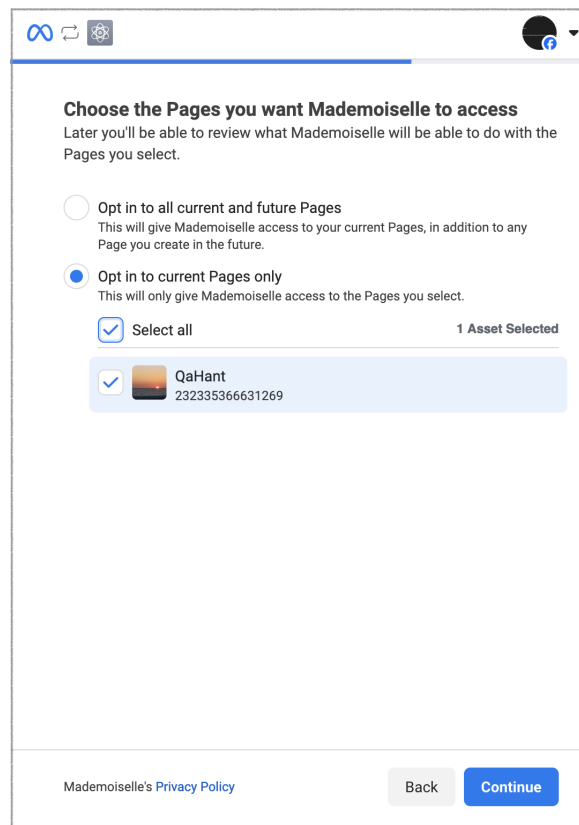


Figure 44. Meta Access

After adding the pages, you'll be presented with a brief review of the Meta access. Review the information carefully and ensure it aligns with your intentions:

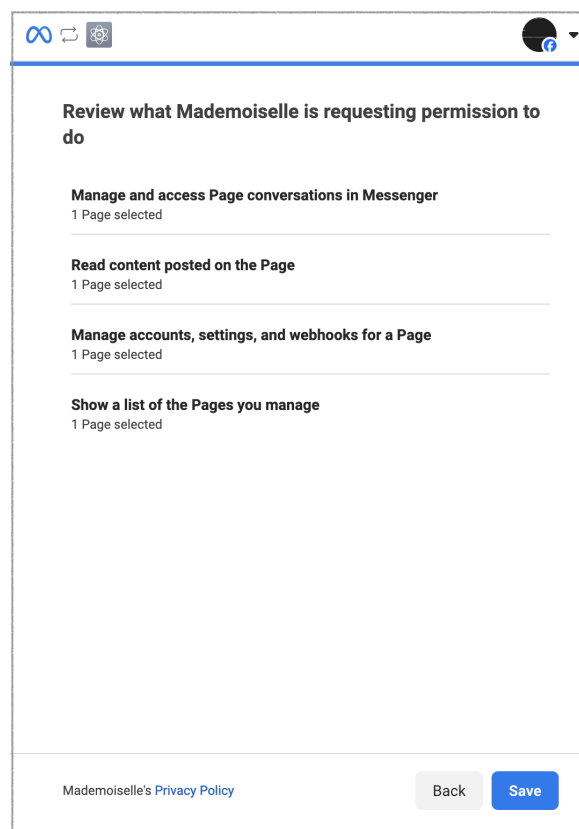


Figure 45. Meta Review

Once you've confirmed the details, proceed to confirm and proceed to the CMP window to continue with the setup process.

Once you successfully connect via your Facebook account, the fields within the new window will be automatically populated. At the end of the setup, the CMP window should resemble the following image:

Signup View signup parameters ▼

You are logged in, Omnichannel!

[Logout from Facebook](#)

Omnichannel ▼

Or enter data manually

Page ID: 185124521350972 ✓

Page Name: Omnichannel ✓

Page Access Token: EAAMGi6RIIXcBO1T391291i4CGUCZBI4YFNC6vBMZBFhNuiD7YcBd9AXNZ ✓
 Aklw7Duq9rFqK4vtCETHjHPCGmPCsyUEnMGqWgVZBZCGmvbfBUhrLPL
 GLmNk2E3VZAkENBbmyXLz0OZAKNeU7n3c01jObCYvCuhf04qQQn36tTrl
 OWqNnuQ50K9pHI0IUC58B8MG2djODSUZD

[Submit](#)

© Bicom Systems - CMP 1.0.0+dev.0.rev.96b6d5b

Figure 46. Populated CMP



Page access tokens, which we save and use for communication with Facebook, generally never expire. However, they can be invalidated by certain security-related events, such as the user manually removing app access or changing their Facebook password. When this happens, we cannot send messages to Facebook for that page anymore, and "ERROR CMP: Failed to send message" will appear. The solution for this error is to remove and then re-add the channel.

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 Facebook channel.

Facebook Channel > Add

Page and routing

Name: Omnichannel

ID: 185124521350972

[Connect with Facebook](#)

Destination: Queue - TechnicalAssistance ✓

[Save](#) [Go back](#)

Figure 47. Submit The CMP

The first two fields will be automatically filled in (required). To confirm the creation of the Facebook channel, click on the "Save" button.

Can't Load URL Error

The error message *"Can't load URL: The domain of this URL isn't included in the app's domains"* typically occurs when attempting to access a URL within an app that has been configured to allow connections only to specific domains.

This security measure is implemented to enhance app security and protect against unauthorized access to external websites that may pose risks to the app or the user's device.

To troubleshoot and resolve the "Can't load URL: The domain of this URL isn't included in the app's domains" error, follow these detailed steps:

- Log in to the Facebook Developers website.
- Navigate to the "My Apps" section located in the upper-right corner, and select the specific app you previously created.
- Click on "Settings" and then select "Basic".
- Locate the field labeled "App Domains" and ensure that it includes the domain(s) you are trying to access from your app.

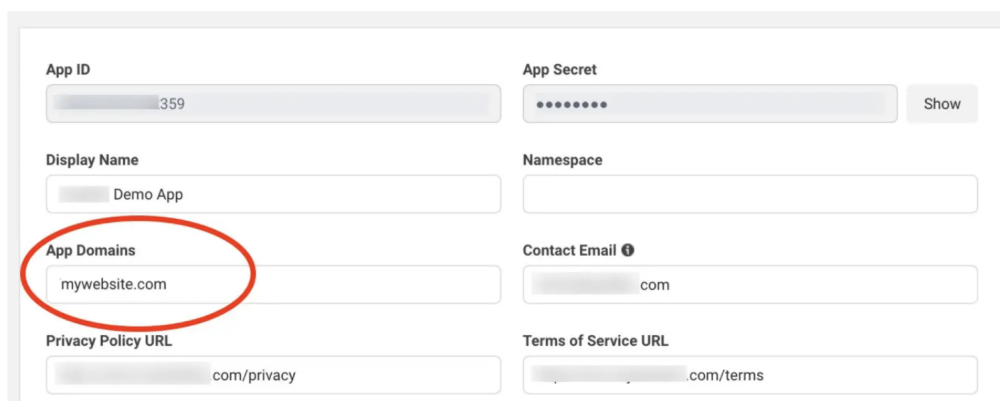
A screenshot of the Facebook App Settings page, specifically the 'Basic' tab. The page contains several input fields for app configuration. The 'App Domains' field, which contains the text 'mywebsite.com', is highlighted with a red circle. Other visible fields include 'App ID' (with a value of 1359), 'App Secret' (masked with dots and a 'Show' button), 'Display Name' (with a value of 'Demo App'), 'Namespace', 'Contact Email' (with a value of 'com'), 'Privacy Policy URL' (with a value of 'com/privacy'), and 'Terms of Service URL' (with a value of 'com/terms').

Figure 48. App Domains

The domain you add to the Add Domains field must not contain 'https', 'www', or 'subdomain'.

- For custom domain: the domain must be example.com
- For sharetribe subdomain: the domain will be example.sharetribe.com

Double-check the spelling and format of the domain you're adding to the "App Domains" field. After adding the domain, remember to save your changes.

If the error persists:

You will need to adjust OAuth Settings:

1. Go to "Client OAuth Settings" in your app settings.
2. Enable 'Embedded Browser OAuth Login' and disable 'Use Strict Mode for Redirect URIs'.
3. Enter the correct redirect URI if required.
4. Save the changes.

OmniChannelIntegration App ID: 13860 App type: Business

Dashboard Settings Roles Alerts App Review Products Add Product Facebook Login Settings Quickstart Messenger Activity Log Activity Log

Easily add Facebook Login to your app with our Quickstart

Client OAuth settings

☒ Client OAuth login Enables the standard OAuth client token flow. Secure your application and prevent abuse by locking down which token redirect URIs are allowed with the options below. Disable globally if not used. [?]

☒ Web OAuth login Enables web-based Client OAuth Login. [?]

☒ Enforce HTTPS Enforce the use of HTTPS for Redirect URIs and the JavaScript SDK. Strongly recommended. [?]

☐ Force Web OAuth reauthentication When on, prompts people to enter their Facebook password in order to log in on the web. [?]

☒ Embedded Browser OAuth Login Enable webview Redirect URIs for Client OAuth Login. [?]

☐ Use Strict Mode for redirect URIs Only allow redirects that exactly match the Valid OAuth Redirect URIs. Strongly recommended. [?]

Valid OAuth Redirect URIs

A manually specified redirect_uri used with Login on the web must exactly match one of the URIs listed here. This list is also used by the JavaScript SDK for in-app browsers that suppress popups. [?]

Copy to clipboard

☐ Login from Devices Enables the OAuth client login flow for devices like a smart TV [?]

☐ Login with the JavaScript SDK Enables Login and signed-in functionality with the JavaScript SDK. [?]

Allowed Domains for the JavaScript SDK

Login and signed-in functionality of the JavaScript SDK will only be available on these domains. [?]

Discard Save changes

Figure 49. Client OAuth Settings



Ensure to replace "example.mycompany.com" with the actual URL of your CMP installation. Failure to update this URL will result in a Facebook error when attempting to connect pages with your CMP. The error message will state: "Can't load URL: The domain of this URL isn't included in the app's domains. To be able to load this URL, add all domains and sub-domains of your app to the App Domains field in your app settings."

By following these steps, you can address the domain-related error and ensure smooth functionality of your app's integration with Facebook's services.

12. 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, WhatsApp, or WhatsApp.

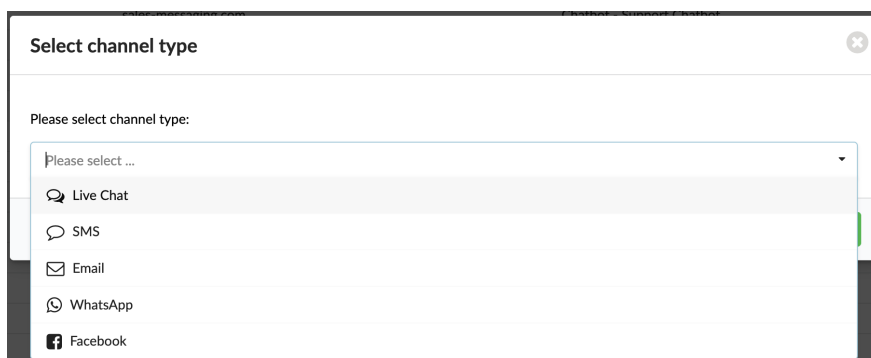


Figure 50. Channel Type

Channel Type

To begin the process of creating a WhatsApp channel, select the WhatsApp channel type.

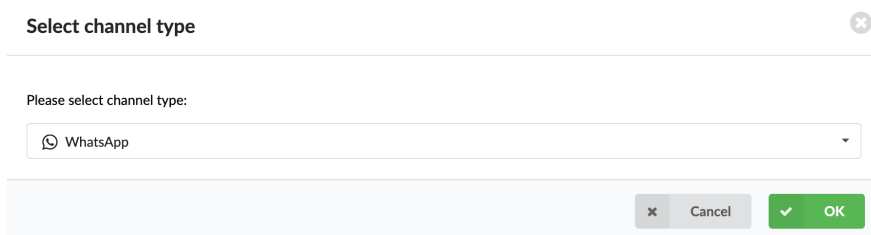


Figure 51. WhatsApp Channel Type

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.

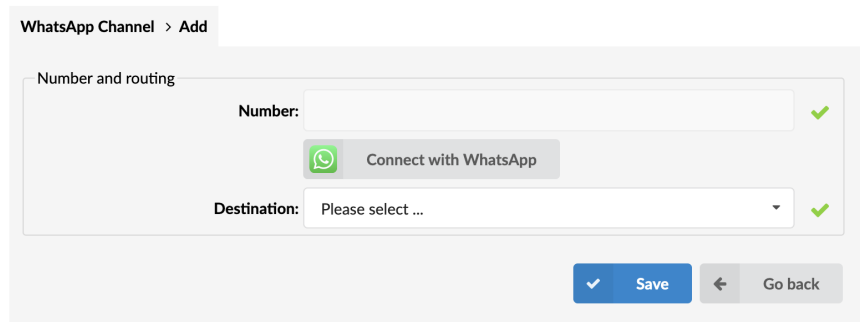
The screenshot shows a web interface for setting up a WhatsApp channel. At the top, there's a breadcrumb trail: "WhatsApp Channel > Add". Below this is a section titled "Number and routing". Inside this section, there are two main fields. The first is labeled "Number:" and has a text input field with a green checkmark to its right. Below the "Number:" field is a button with the WhatsApp logo and the text "Connect with WhatsApp". The second field is labeled "Destination:" and has a dropdown menu with the text "Please select ..." and a green checkmark to its right. At the bottom right of the form, there are two buttons: a blue "Save" button with a checkmark icon, and a grey "Go back" button with a left arrow icon.

Figure 52. 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.

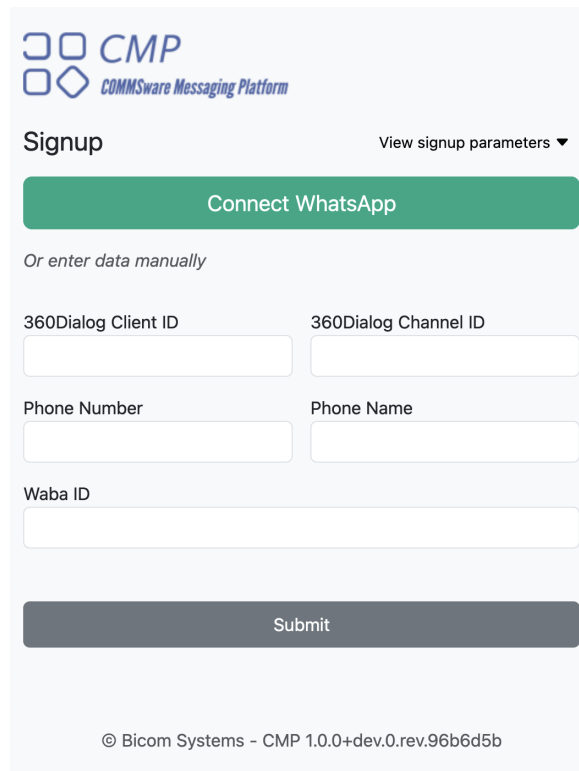
The image shows a web form for the CMP (COMMSware Messaging Platform) signup. At the top left is the CMP logo with the text 'COMMSware Messaging Platform'. To the right of the logo is the word 'Signup' and a link 'View signup parameters' with a dropdown arrow. Below this is a large green button labeled 'Connect WhatsApp'. Underneath the button is the text 'Or enter data manually'. This is followed by four input fields: '360Dialog Client ID', '360Dialog Channel ID', 'Phone Number', and 'Phone Name'. Below these is a single input field for 'Waba ID'. At the bottom of the form is a dark grey button labeled 'Submit'. At the very bottom, there is a copyright notice: '© Bicom Systems - CMP 1.0.0+dev.0.rev.96b6d5b'.

Figure 53. 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.

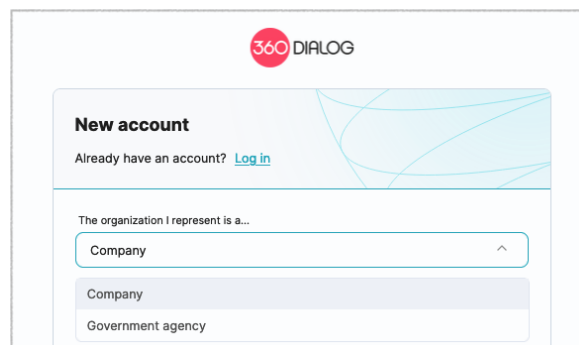

The image shows the 'New account' section of the 360Dialog sign-up page. At the top is the 360Dialog logo. Below it, the text 'New account' is displayed. Underneath is a link 'Already have an account? Log in'. The main part of the form is a dropdown menu titled 'The organization I represent is a...'. The dropdown is currently open, showing two options: 'Company' and 'Government agency'. The 'Company' option is highlighted.

Figure 54. 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.



New account

Already have an account? [Log in](#)

The organization I represent is a...

Company

Company Name * Tech Solutions Corp.

Country * Canada

Company email * deckardcain@instants.site

Password *

☒ I'm not a robot

reCAPTCHA
Privacy · Terms

Create account

By creating an account, you agree to our [terms of service](#)

Figure 55. 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.

The screenshot shows the 'Email Verification' screen from 360 DIALOG. At the top, the 360 DIALOG logo is displayed. Below it, the title 'Email Verification' is followed by the message: 'We've sent an email with a code to **deckardcain@instants.site**'. The verification code input area consists of six boxes: the first three are empty, followed by a hyphen, and the last three are also empty. Below the input boxes, a timer indicates 'Re-send code in 50s...'. At the bottom, there are two buttons: 'Go back' on the left and 'Continue' on the right.

Figure 56. 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.

This screenshot shows the 'Email Verification' screen after the code has been entered. The 360 DIALOG logo is at the top. The title 'Email Verification' is followed by the message: 'We've sent an email with a code to **deckardcain@instants.site**'. The verification code input area now shows the digits '1', '4', '5', a hyphen, '3', '8', and '3'. Below the input boxes, a timer indicates 'Re-send code in 28s...'. At the bottom, there are two buttons: 'Go back' on the left and 'Continue' on the right.

Figure 57. Verify Your Email



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.

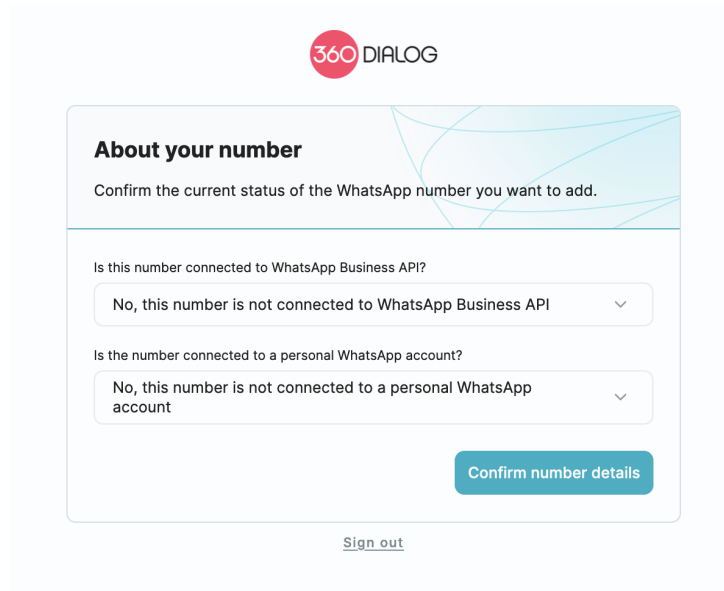
The screenshot shows a web interface for '360 DIALOG'. At the top, there's a red circular logo with '360' and the word 'DIALOG' in blue. Below this is a section titled 'About your number' in bold. Underneath the title is a subtitle: 'Confirm the current status of the WhatsApp number you want to add.' The main form area contains two questions, each with a dropdown menu. The first question is 'Is this number connected to WhatsApp Business API?' and the selected option is 'No, this number is not connected to WhatsApp Business API'. The second question is 'Is the number connected to a personal WhatsApp account?' and the selected option is 'No, this number is not connected to a personal WhatsApp account'. At the bottom right of the form is a blue button labeled 'Confirm number details'. Below the form, centered, is a link that says 'Sign out'.

Figure 58. 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.

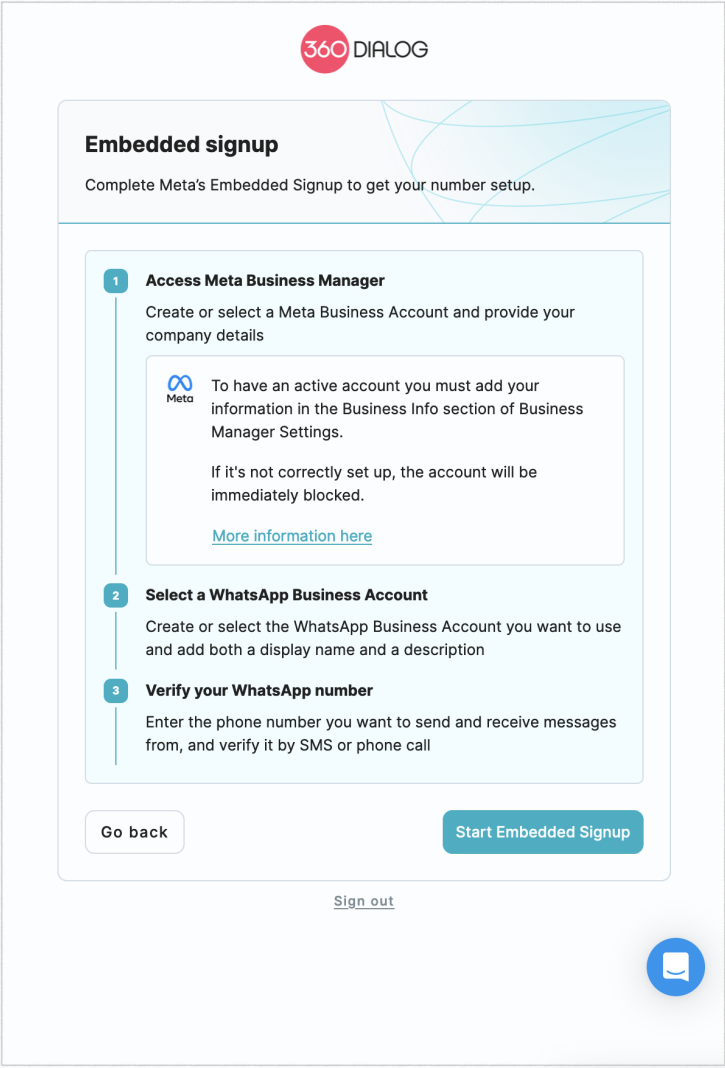


Figure 59. Embeded Signup

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.

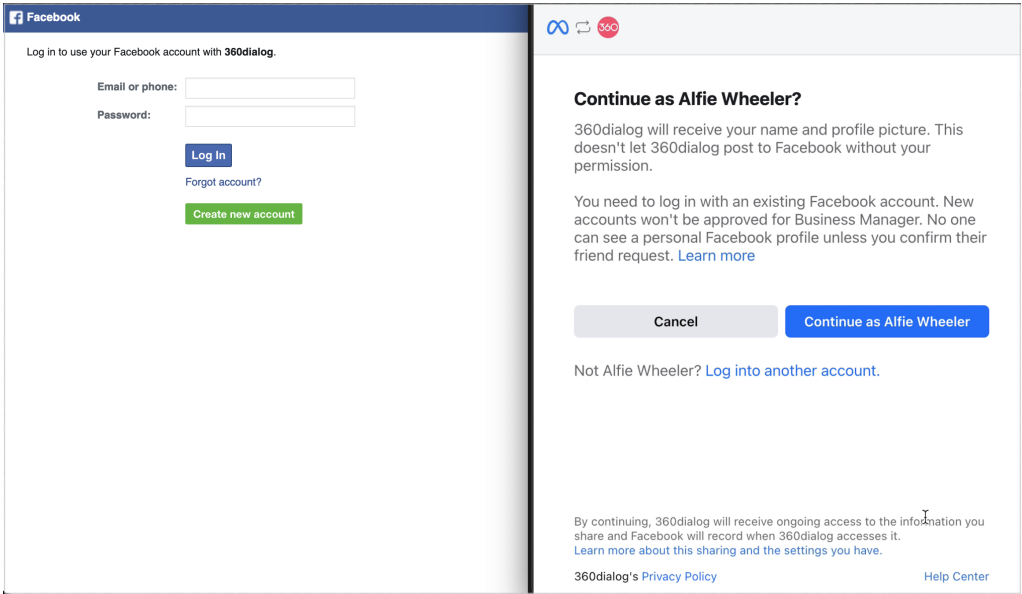


Figure 60. Continue With Facebook

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

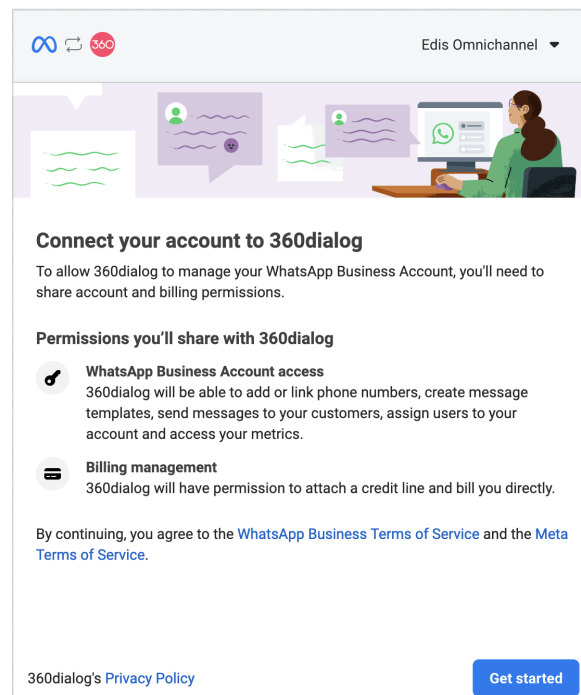


Figure 61. Get Started

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

The screenshot shows a web interface for filling in business information. At the top, there are logos for Facebook, WhatsApp, and 360dialog, along with the text 'Alfie Wheeler'. On the left is a vertical sidebar with five radio buttons, the first of which is selected. The main heading is 'Fill in your business information'. A sub-heading states: 'Select an existing or create a new business portfolio to add your phone number. Your audience will not see this information on your WhatsApp profile.' Below this are several form fields: 'Business name' (a text input field with a character count '0/100'), 'Business Email' (a text input field with a sub-note 'You'll receive an email to verify it.'), 'Business website or profile page' (a text input field with a sub-note 'If you don't have a business website, you can use a URL from any of your social media profile pages. This should be a website/social media page for your business.'), and 'Country' (a dropdown menu with the text 'Select a Country'). Below the country dropdown is a button that says '+ Add Address (optional)'. At the bottom left is a link to '360dialog's Privacy Policy' and at the bottom right are 'Back' and 'Next' buttons.

Figure 62. 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.

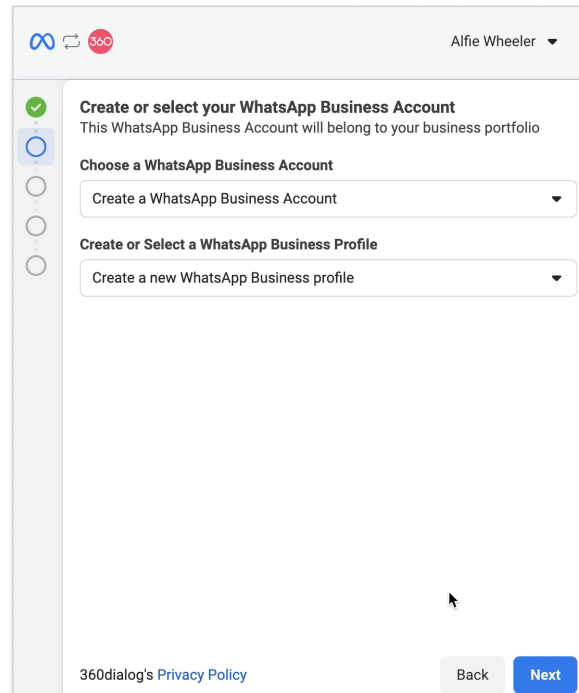


Figure 63. Business Account and Profile

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.

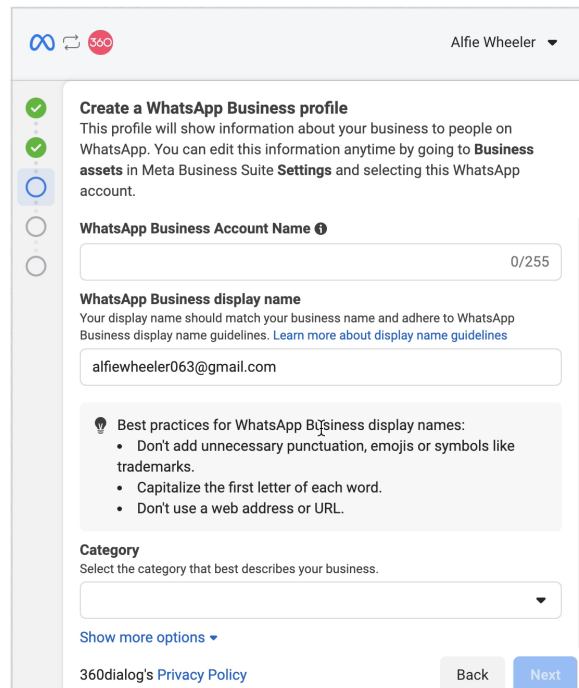


Figure 64. Create Business Profile

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.

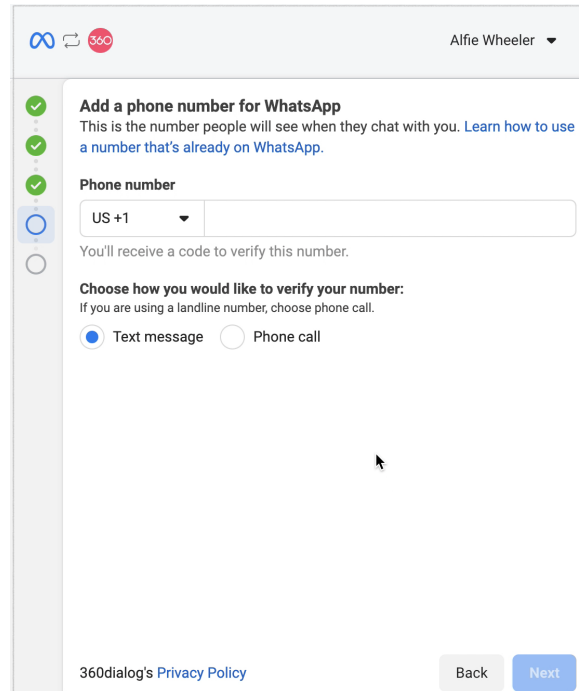


Figure 65. Add Phone Number

If you enter a phone number that is already associated with WhatsApp, you will receive a notification.

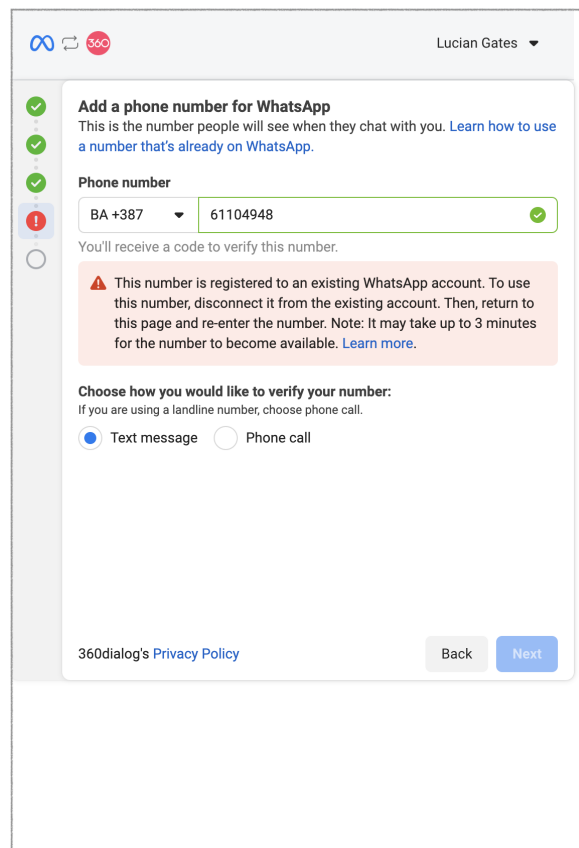


Figure 66. Failed to Add Phone Number

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 67. Instructions

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

Figure 68. 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.

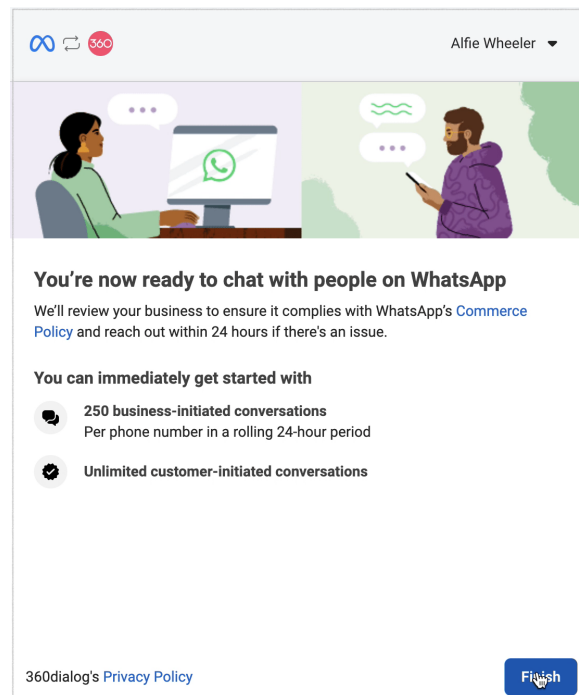


Figure 69. Finish the Setup

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.

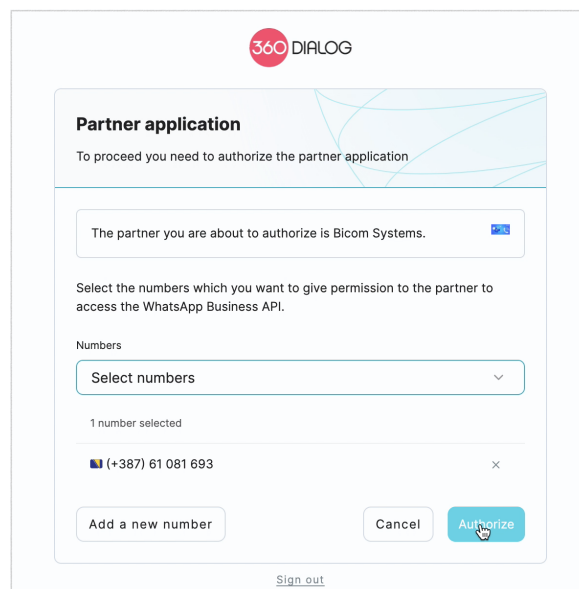
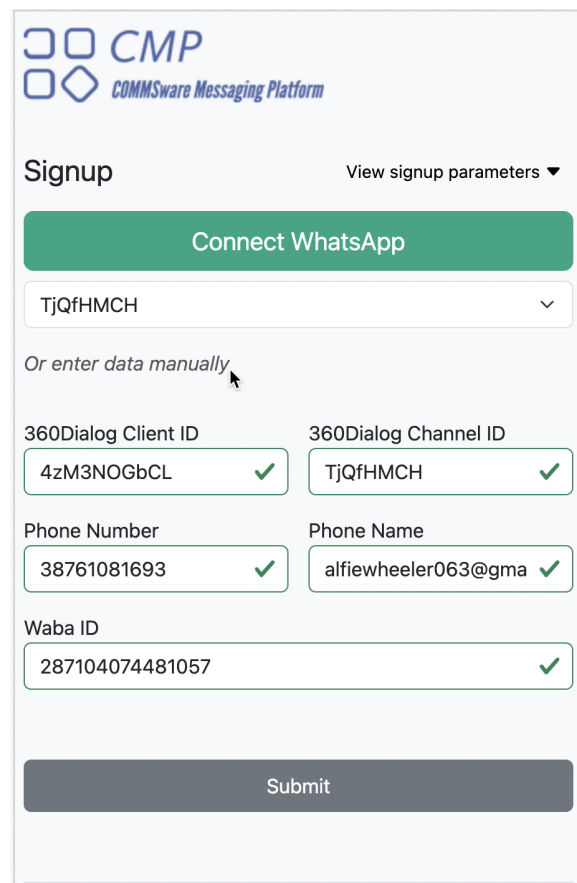


Figure 70. Grant Permission for Number

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



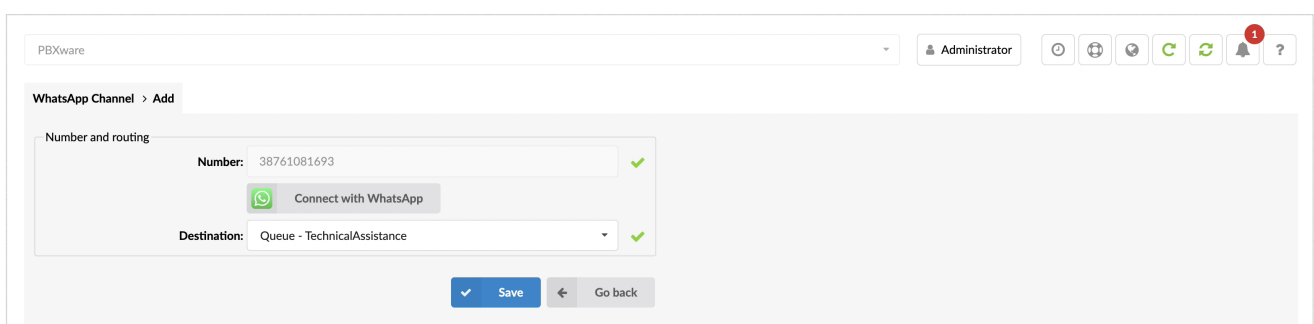
The image shows the 'CMP' (COMMSware Messaging Platform) 'Signup' window. At the top, there's a logo and the text 'CMP COMMSware Messaging Platform'. Below it, the word 'Signup' is displayed next to a 'View signup parameters' link. A prominent green button labeled 'Connect WhatsApp' is centered. Underneath is a dropdown menu showing 'TjQfHMCH'. A link 'Or enter data manually' is present. Below this, several input fields are shown, each with a green checkmark indicating successful validation: '360Dialog Client ID' (4zM3NOGbCL), '360Dialog Channel ID' (TjQfHMCH), 'Phone Number' (38761081693), 'Phone Name' (alfiewheeler063@gma), and 'Waba ID' (287104074481057). A dark grey 'Submit' button is at the bottom.

Figure 71. 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.



The image shows the 'PBXware' interface. At the top, there's a dropdown menu set to 'PBXware' and a user profile 'Administrator' with various icons. Below this, the 'WhatsApp Channel > Add' section is active. It contains a 'Number and routing' box with 'Number' set to '38761081693' and 'Destination' set to 'Queue - TechnicalAssistance', both with green checkmarks. A 'Connect with WhatsApp' button is visible. At the bottom of the section are 'Save' and 'Go back' buttons.

Figure 72. 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.

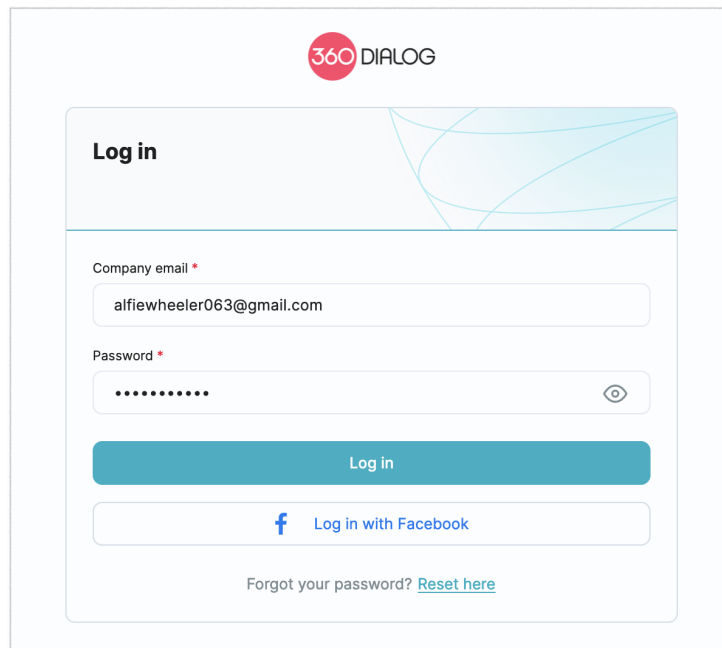
The image shows the 360 Dialog login interface. At the top is the 360 DIALOG logo. Below it is a 'Log in' header. The form contains two input fields: 'Company email *' with the value 'alfiewheeler063@gmail.com' and 'Password *' with masked characters. There is a 'Log in' button and a 'Log in with Facebook' button. At the bottom, there is a link for 'Forgot your password? Reset here'.

Figure 73. 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.

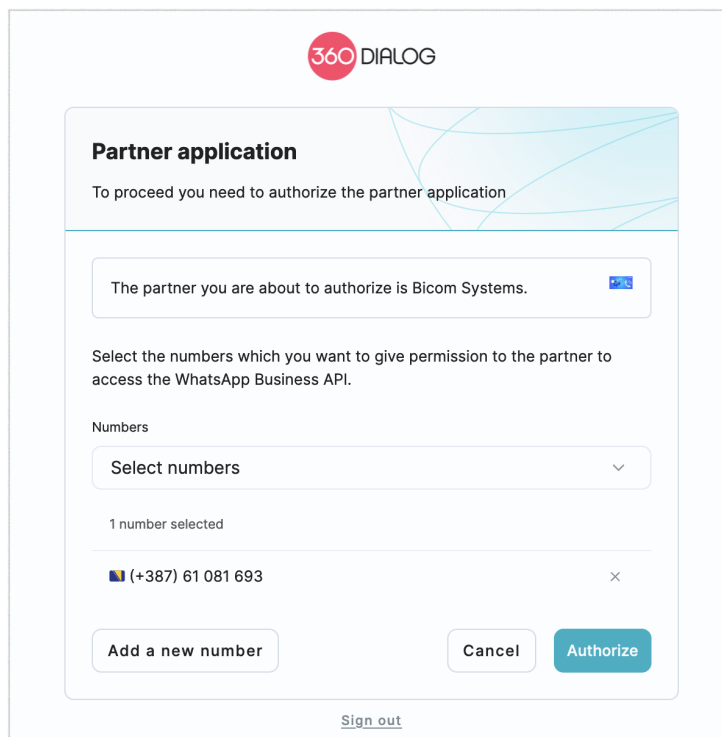
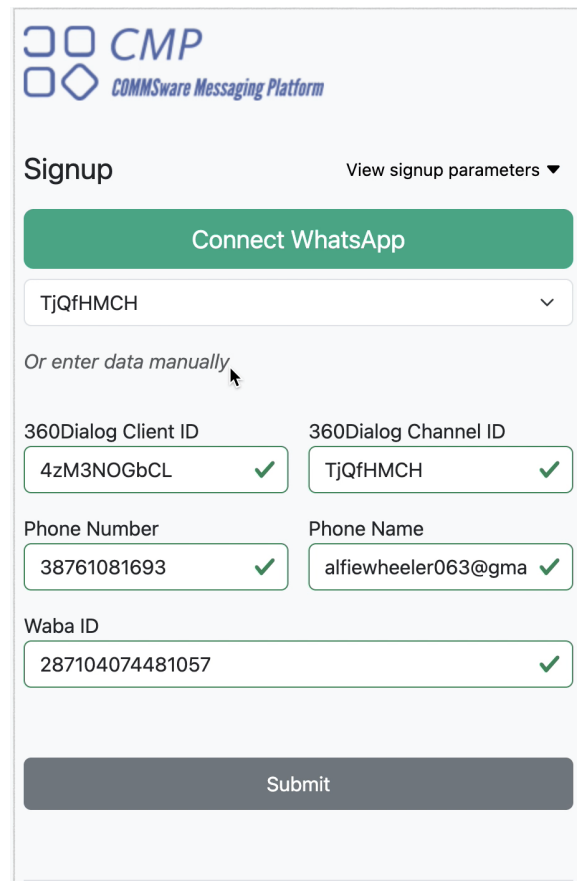
The image shows the 360 Dialog 'Partner application' form. It starts with the 360 DIALOG logo and a header 'Partner application'. Below the header, it says 'To proceed you need to authorize the partner application'. The form displays 'The partner you are about to authorize is Bicom Systems.' with a small profile icon. It then asks the user to 'Select the numbers which you want to give permission to the partner to access the WhatsApp Business API.' There is a 'Numbers' section with a 'Select numbers' dropdown menu. Below this, it shows '1 number selected' and a list of numbers: '+387) 61 081 693'. At the bottom, there are three buttons: 'Add a new number', 'Cancel', and 'Authorize'. A 'Sign out' link is at the very bottom.

Figure 74. Select Number

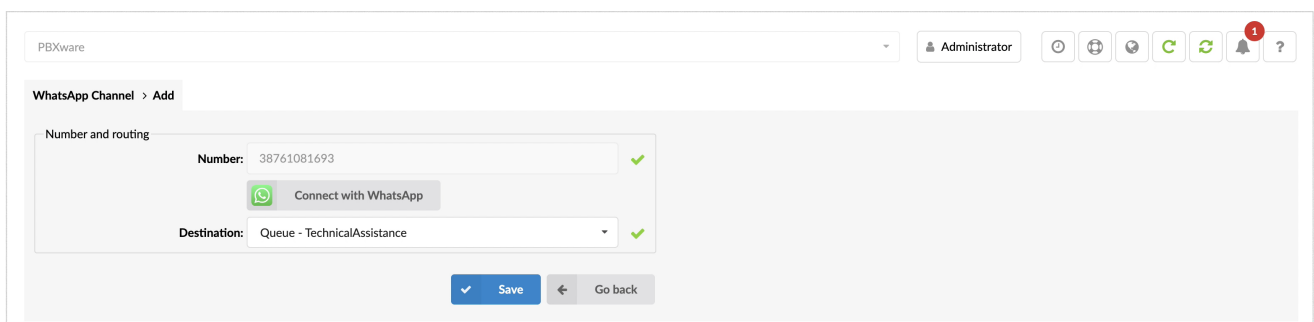
After clicking 'Authorize,' you will be directed back to the CMP window, where all data will be populated accordingly.



The image shows the 'CMP' (COMMSware Messaging Platform) 'Signup' window. At the top, there's a logo and the text 'CMP COMMSware Messaging Platform'. Below it, the word 'Signup' is displayed next to a 'View signup parameters' link. A prominent green button labeled 'Connect WhatsApp' is present. Underneath, a dropdown menu shows 'TjQfHMCH'. A link 'Or enter data manually' is available. The form contains several input fields, each with a green checkmark indicating successful validation: '360Dialog Client ID' (4zM3NOGbCL), '360Dialog Channel ID' (TjQfHMCH), 'Phone Number' (38761081693), 'Phone Name' (alfiewheeler063@gma), and 'Waba ID' (287104074481057). A dark grey 'Submit' button is at the bottom.

Figure 75. 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.



The image shows the 'PBXware' interface. At the top, there's a navigation bar with 'PBXware' on the left, 'Administrator' in the center, and a series of icons on the right, including a notification bell with a red '1'. Below the navigation bar, the main content area is titled 'WhatsApp Channel > Add'. Under this title, there's a section 'Number and routing'. It contains a 'Number' field with the value '38761081693' and a green checkmark. Below the number field is a 'Connect with WhatsApp' button with a WhatsApp logo. Below that is a 'Destination' dropdown menu with the value 'Queue - TechnicalAssistance' and a green checkmark. At the bottom of the form, there are two buttons: a blue 'Save' button with a checkmark icon and a grey 'Go back' button with a left arrow icon.

Figure 76. Successfully Completed Process

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

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