facebook WhatsApp

USER GUIDE

Facebook and WhatsApp Integration

Release Version 7.2

Facebook & WhatsApp Integration

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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.

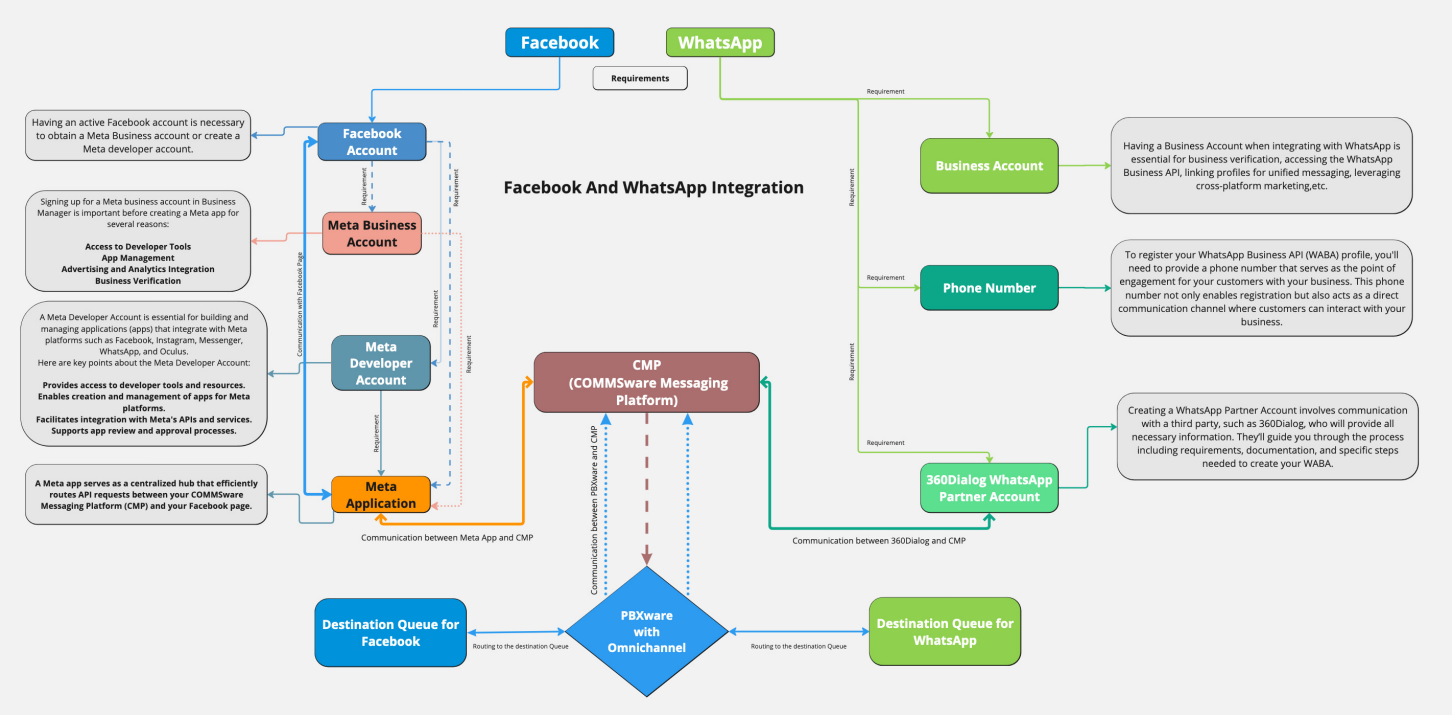

Figure 1. Diagram Overview

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.

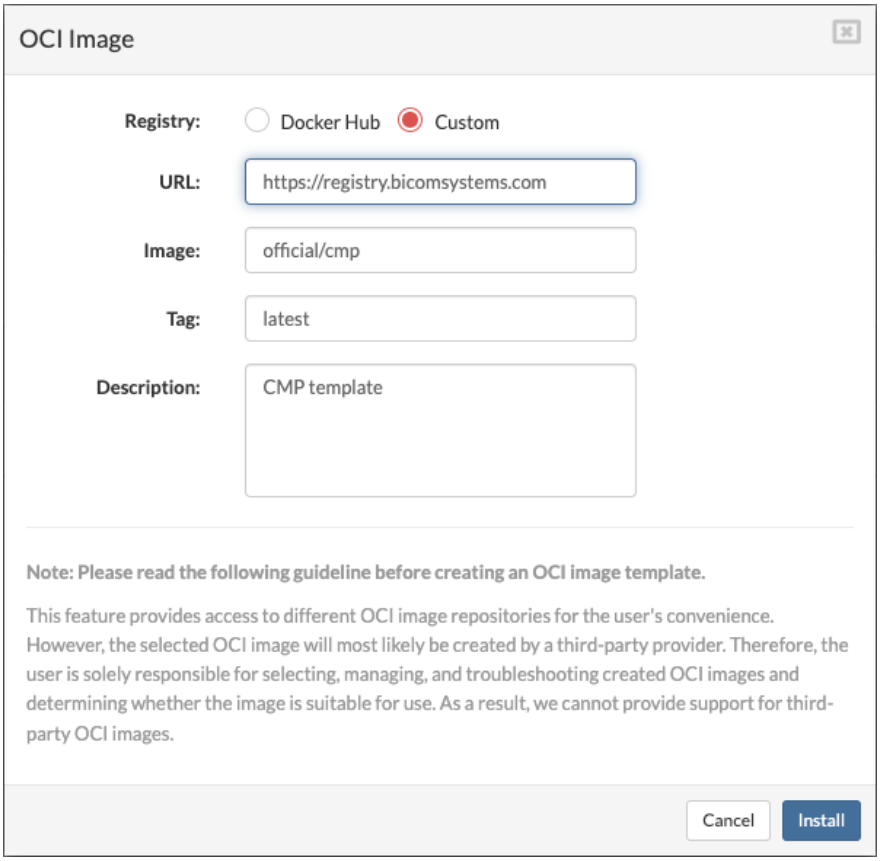

Figure 2. Official CMP OCI Template

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.

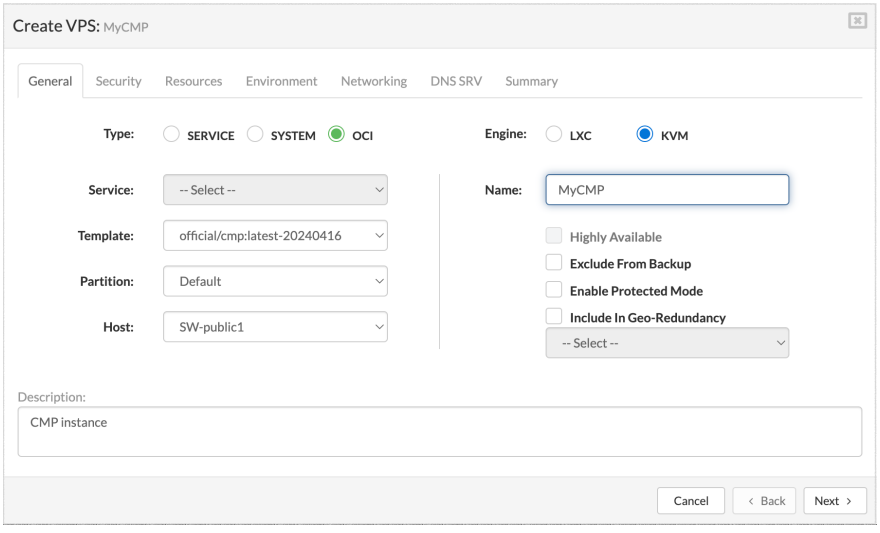

Figure 3. Create a VPS

- 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.

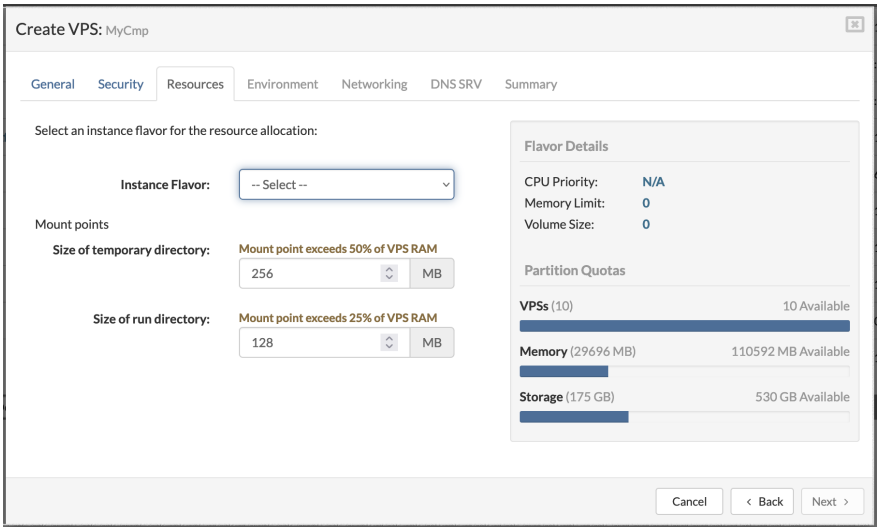

Figure 4. Instance Size

- 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:

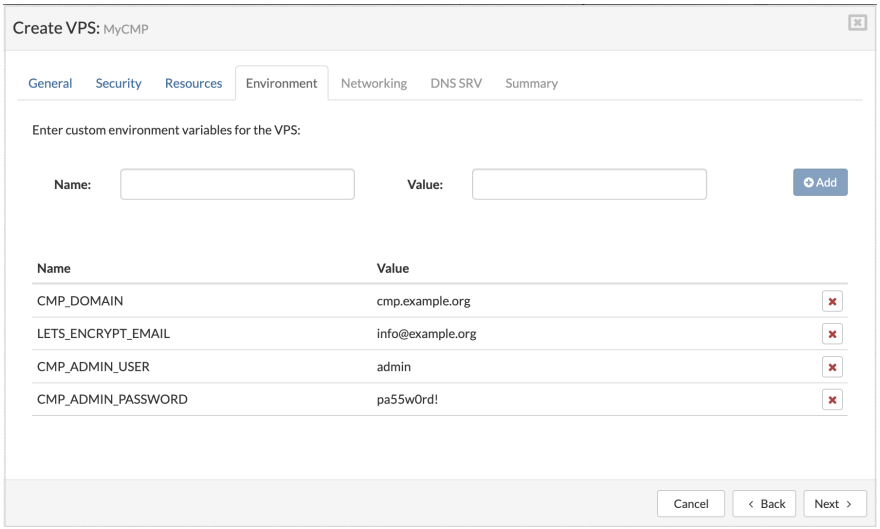

Figure 5. Enviroment Variables

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.

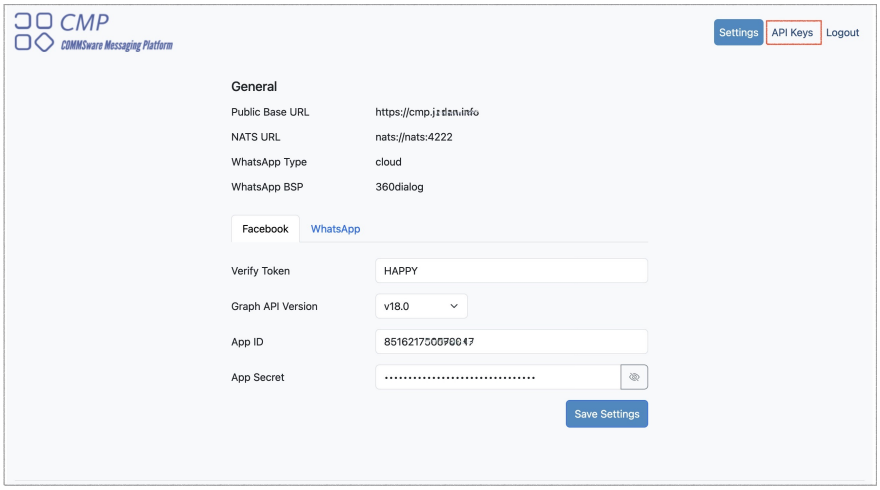

Figure 6. Running VPS

Menaging 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

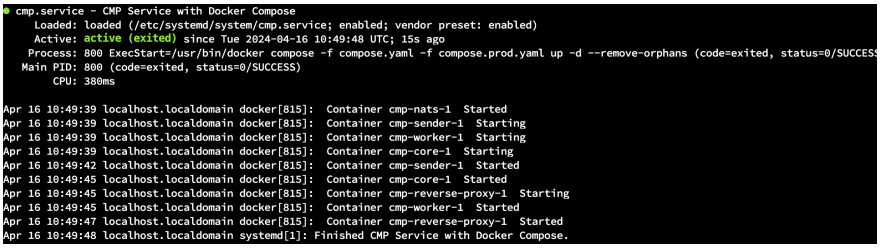

Figure 7. CMP Service

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.

```
cd /cmp
docker compose -f compose.yaml -f compose.prod.yaml down
docker pull registry.bicomsystems.com/internal/cmp-core
docker pull registry.bicomsystems.com/internal/cmp-worker
docker pull registry.bicomsystems.com/internal/cmp-sender
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. Plase 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).

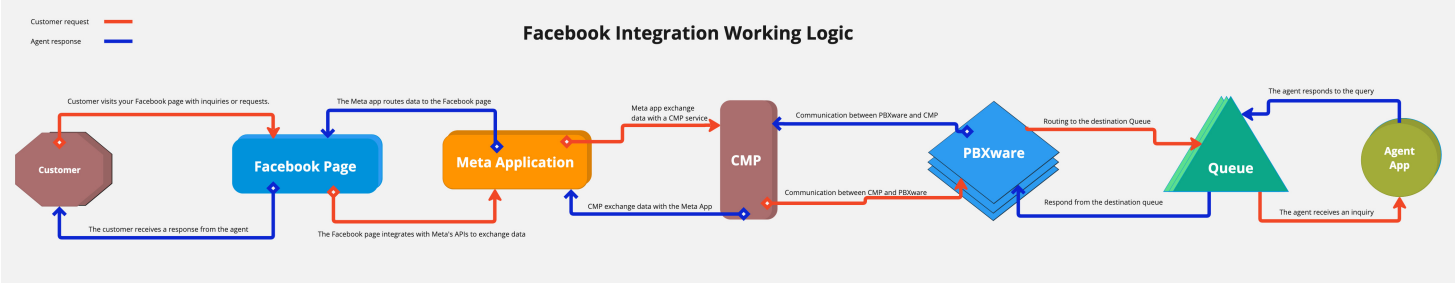

Figure 9. Facebook Integration Working Logic

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).

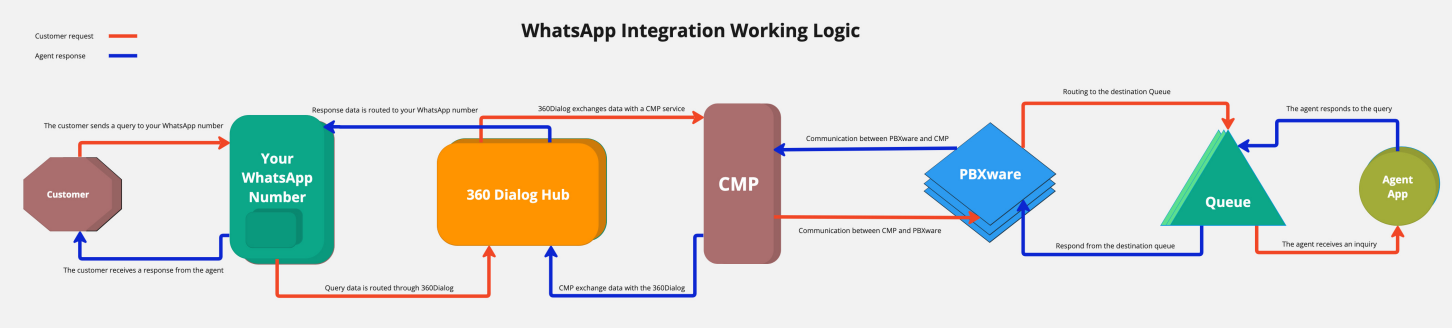

Figure 10. WhatsApp Integration Working Logic

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.

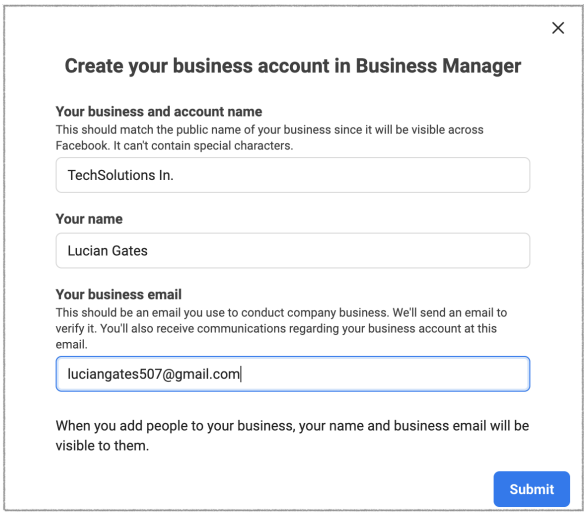

Figure 11. Create An Account

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

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

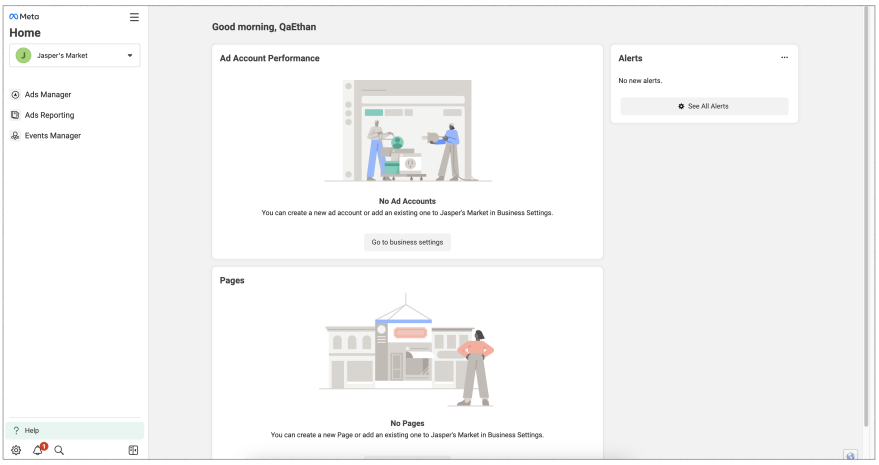

Figure 12. Business Account Home Page

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

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

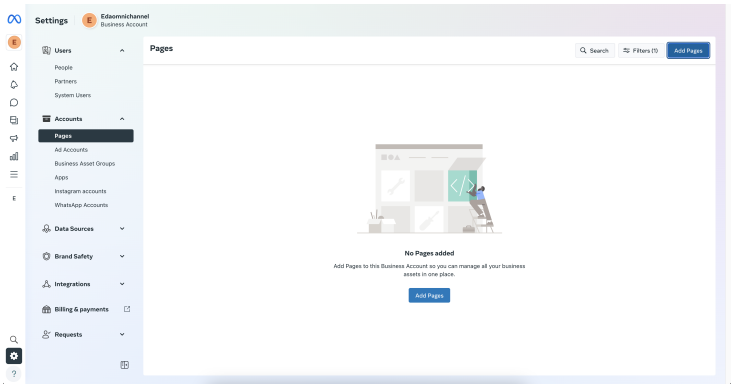

Figure 13. Add Facebook Page

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

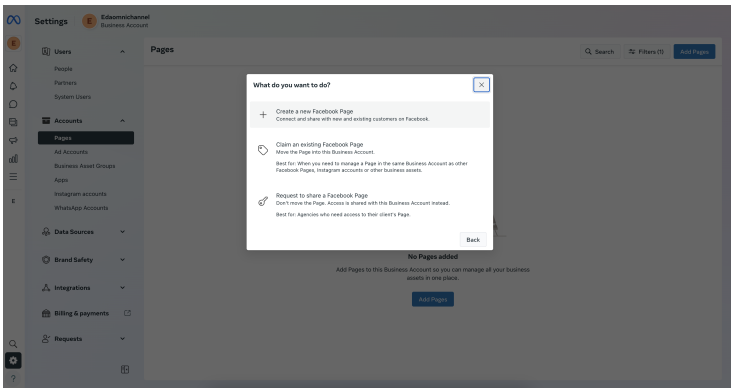

Figure 14. Add Facebook Page

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

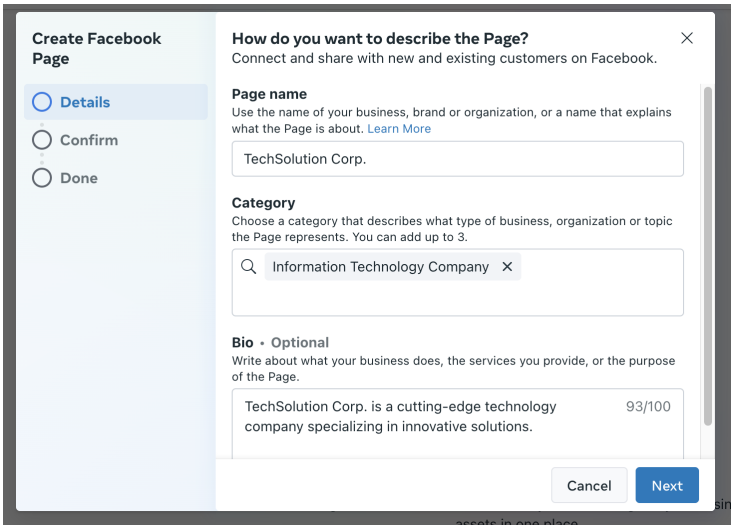

Figure 15. Facebook Page Info

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

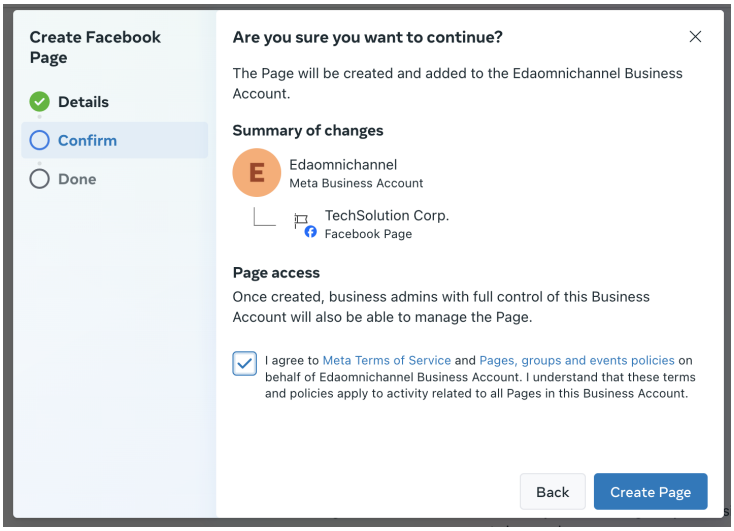

Figure 16. Meta Terms

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

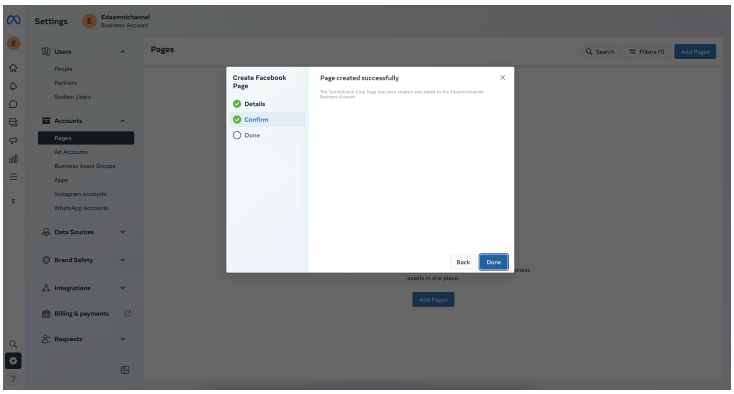

Figure 17. Completed Process

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.

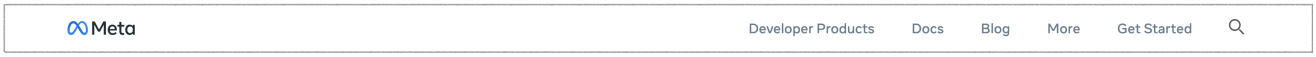

Figure 18. Meta Get Started

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.

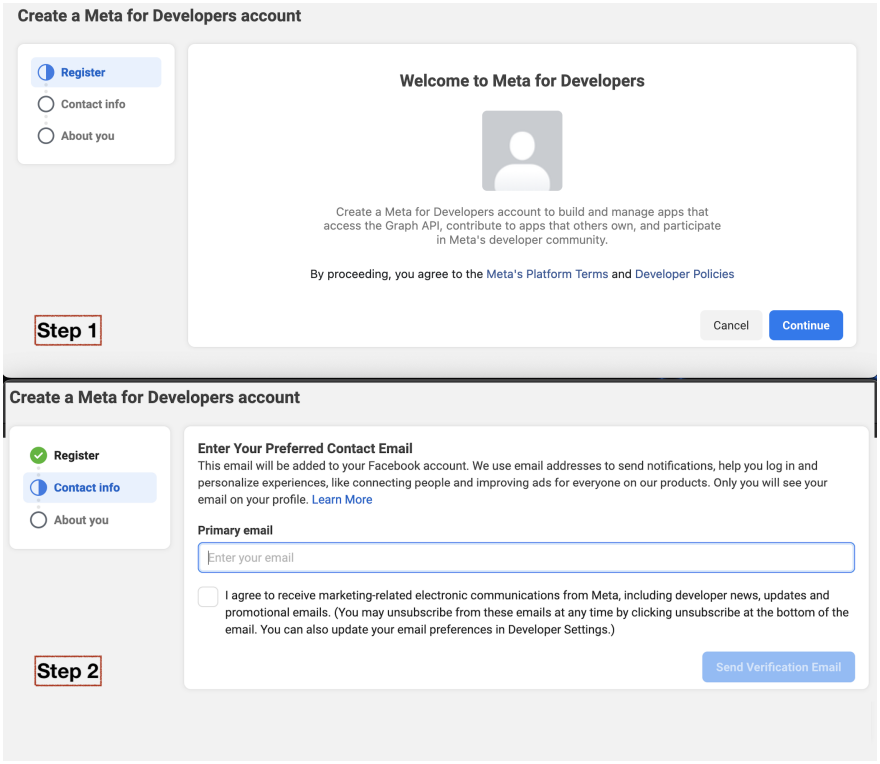

Figure 19. Email Address

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:

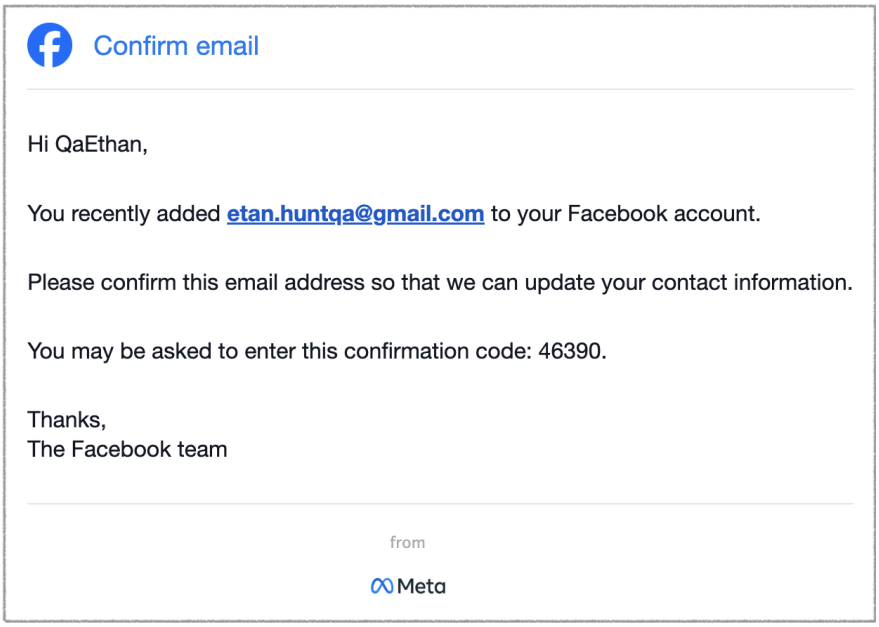

Figure 20. Email Address Verification

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.

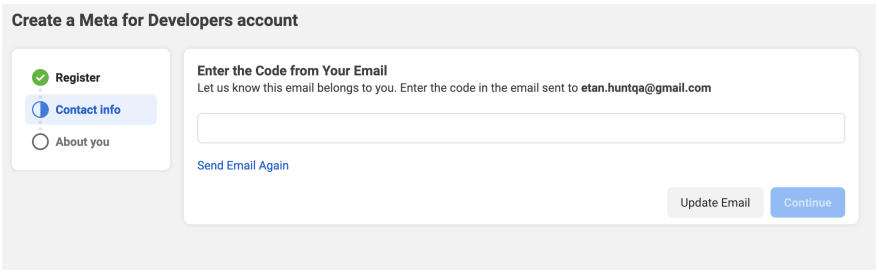

Figure 21. Email Address Verification

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.

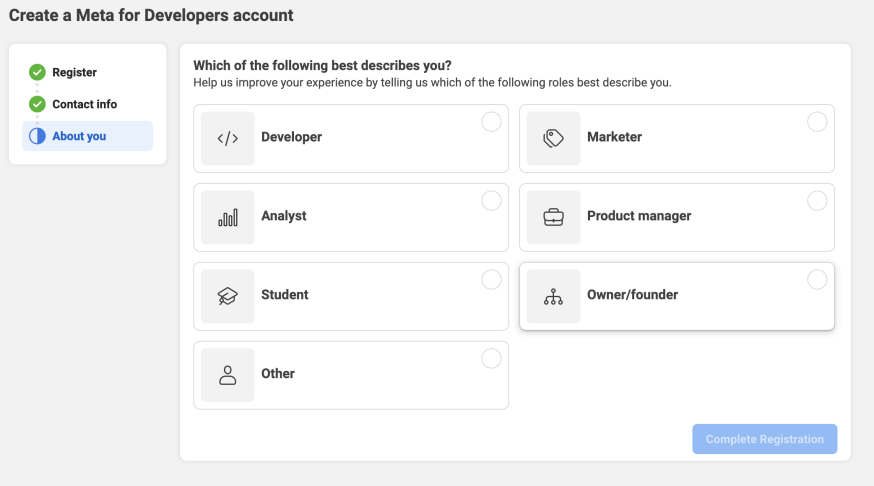

Figure 22. Additional Info

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.

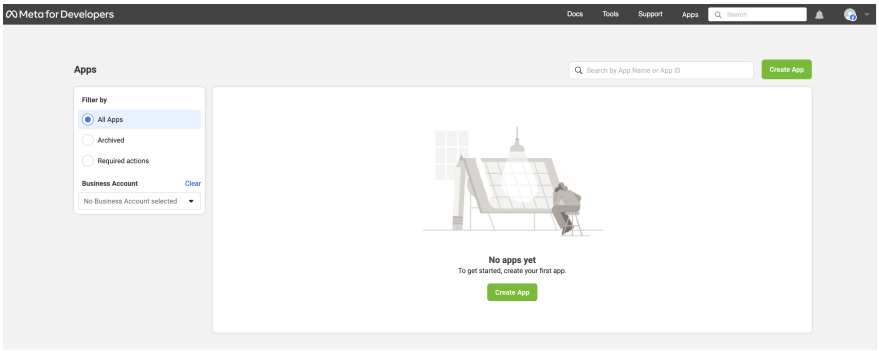

Figure 23. Meta Landing Page

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.

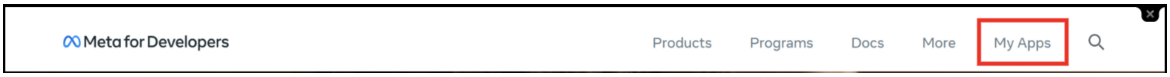

Figure 24. Meta My Apps

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.

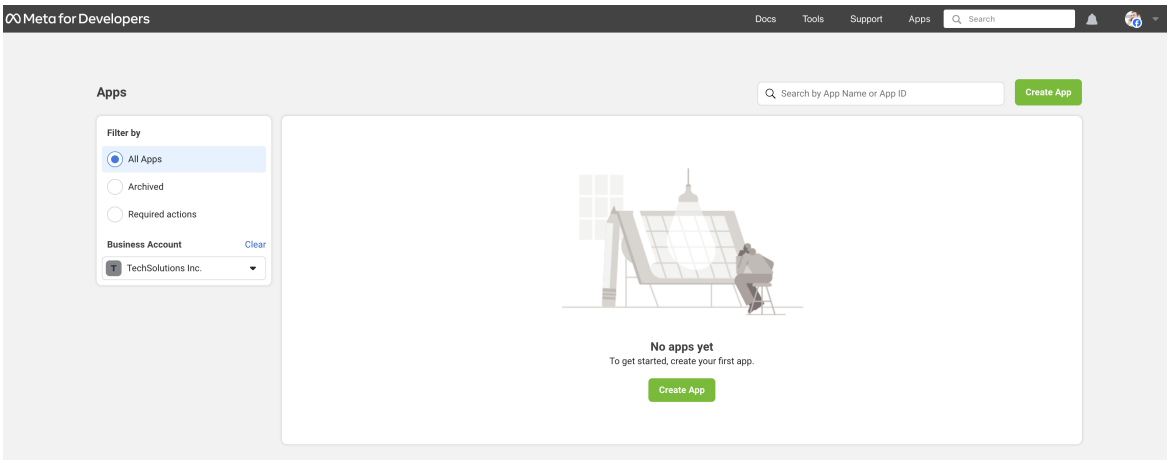

Figure 25. Create New App

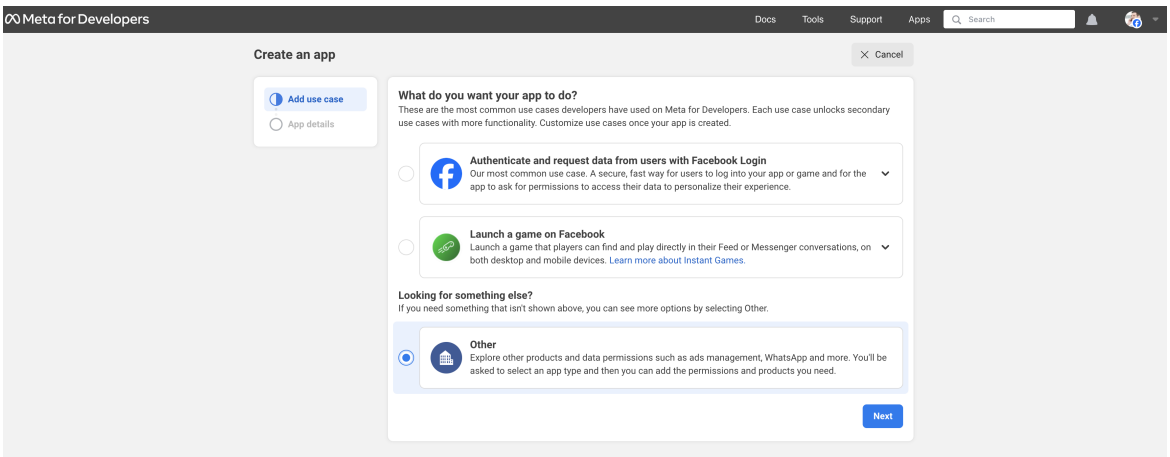

Figure 26. Select Other

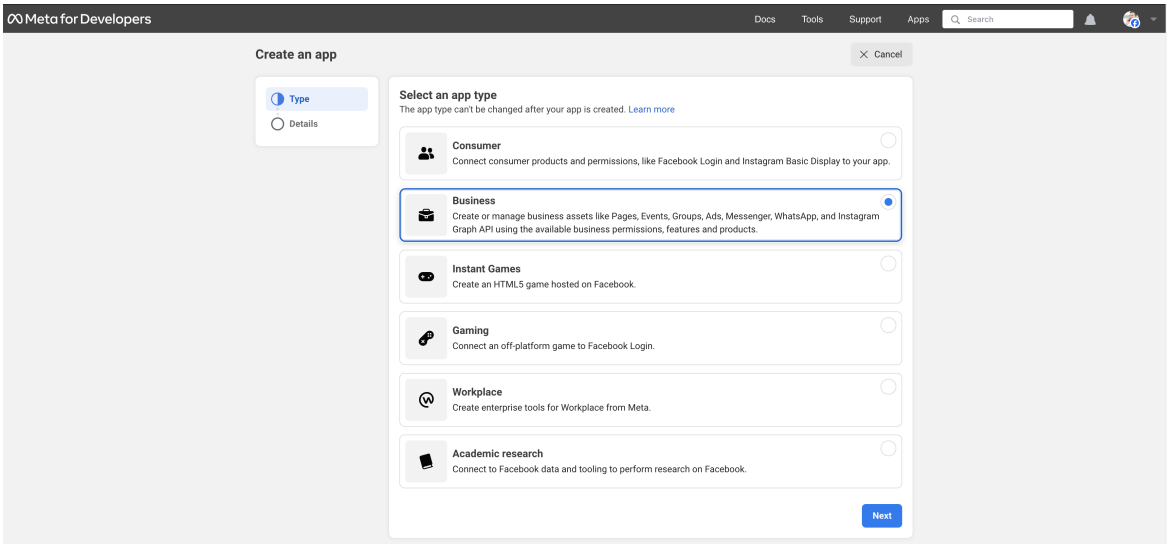

Figure 27. Select Application Type

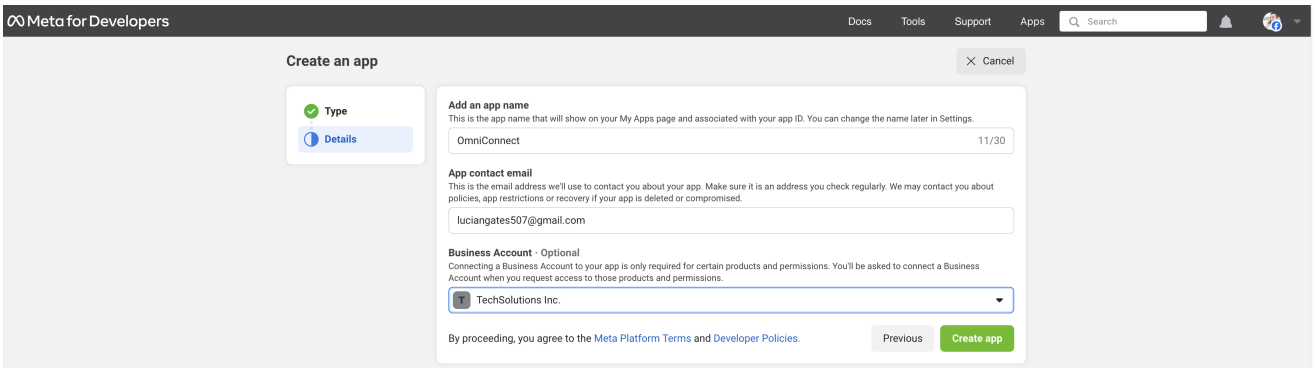

Figure 28. Enter App Info

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

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

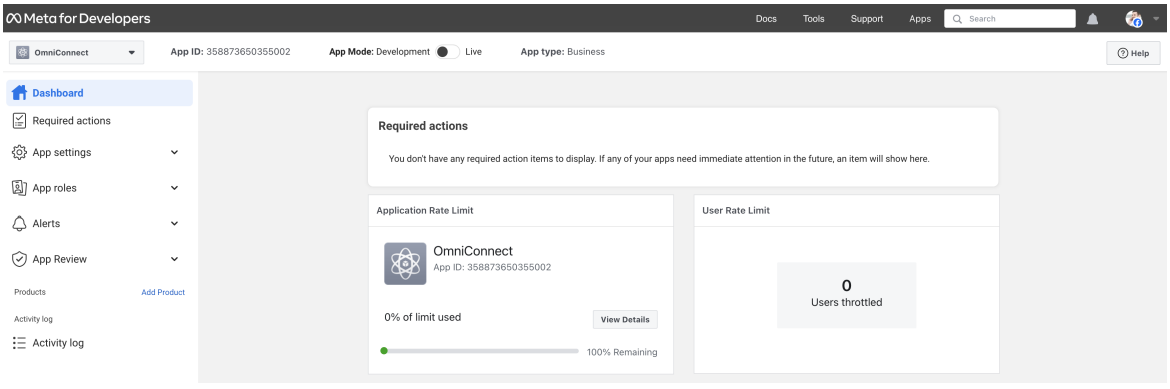

Figure 29. App Dashboard

Adding Products - Messenger

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

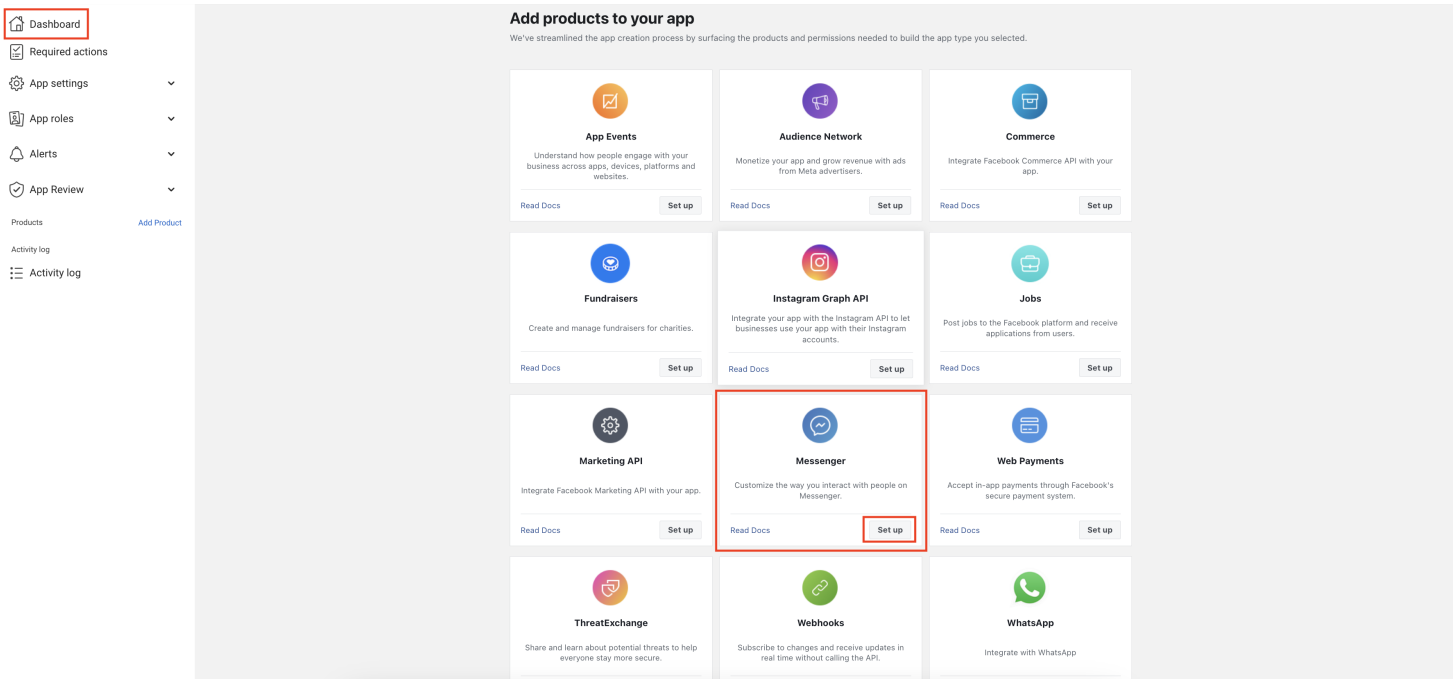

Figure 30. Adding Products

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."

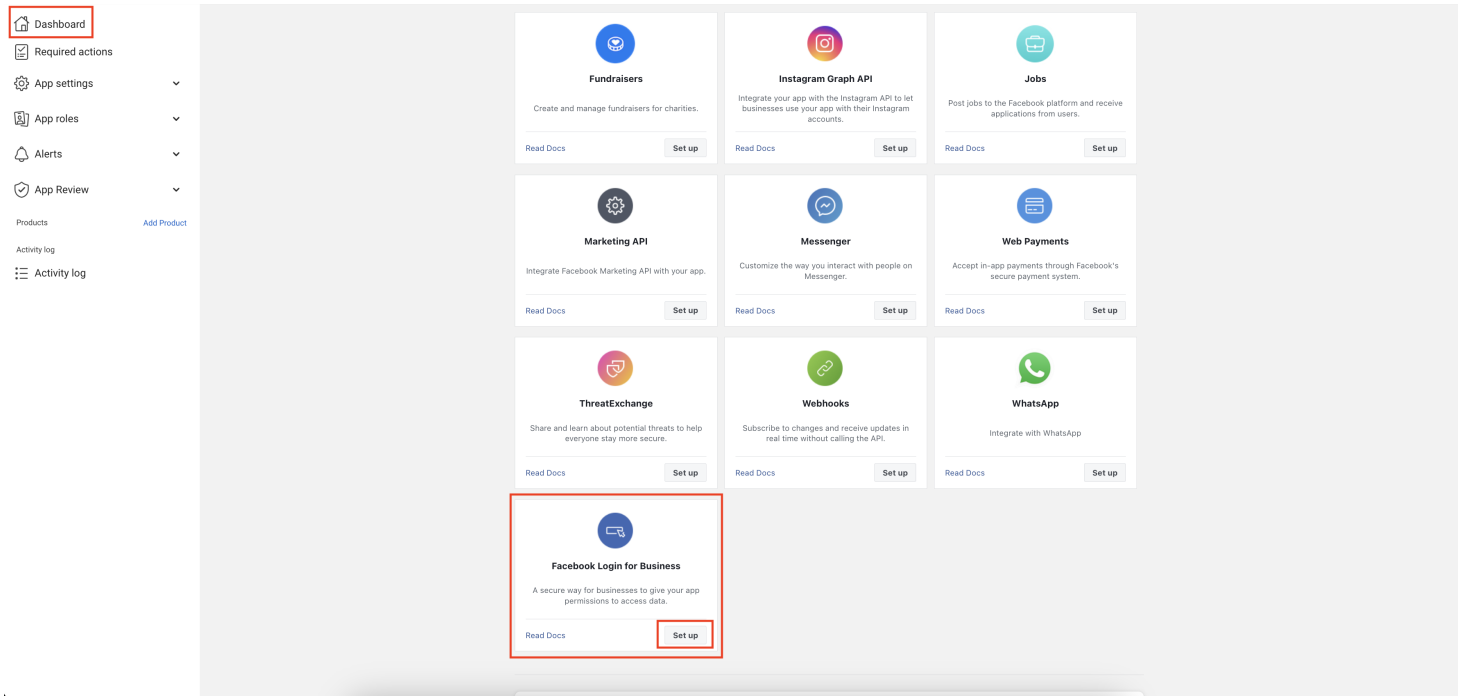

Figure 31. Adding Products

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).

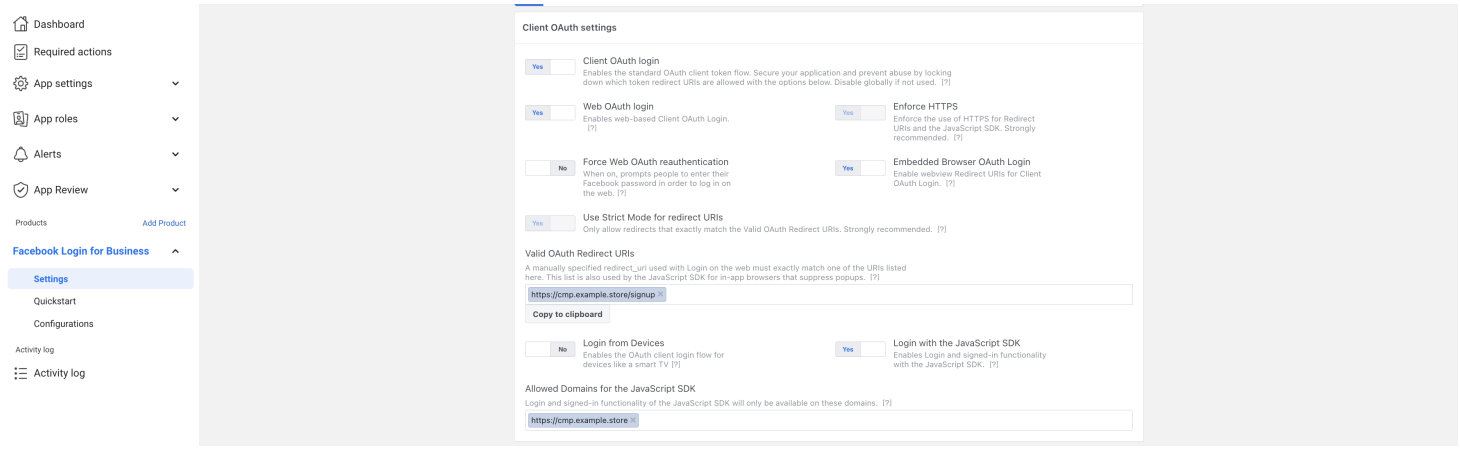

Figure 32. Faceboook Login Settings

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.

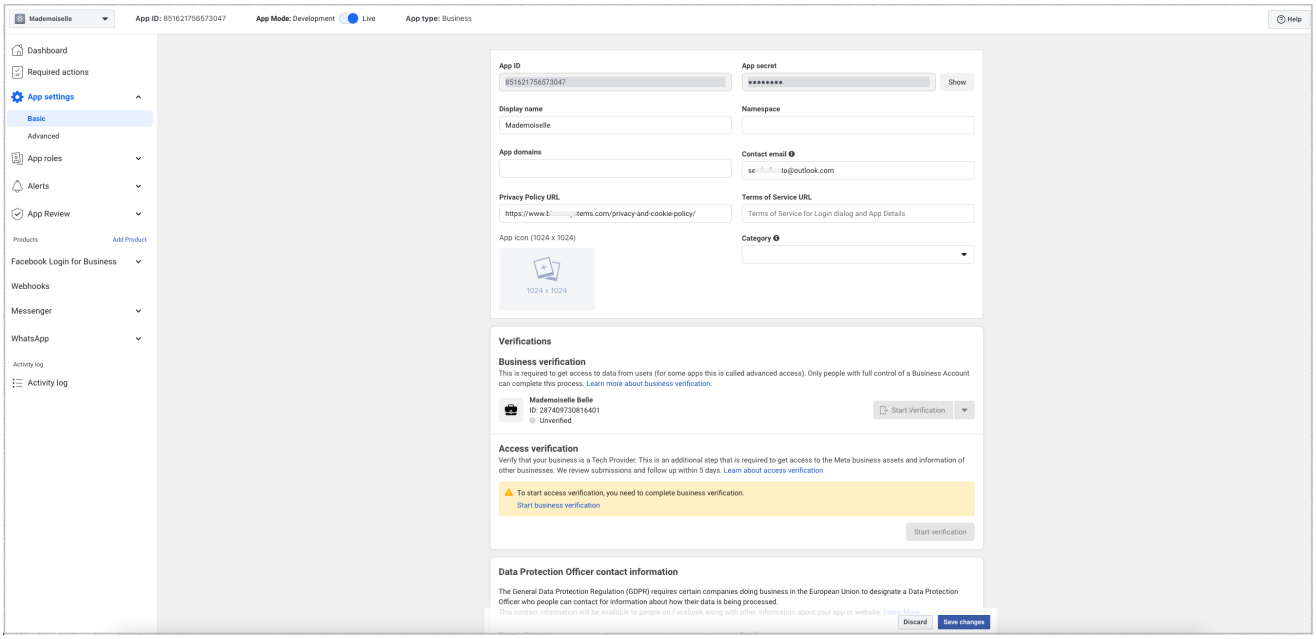

Figure 33. Facebook App Settings

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

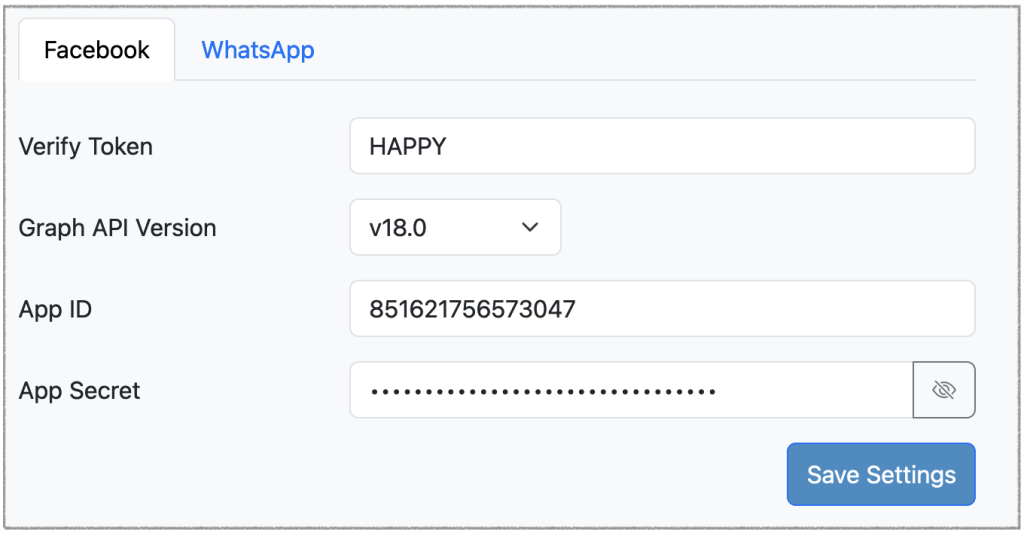

Figure 34. CMP Facebook Settings

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.

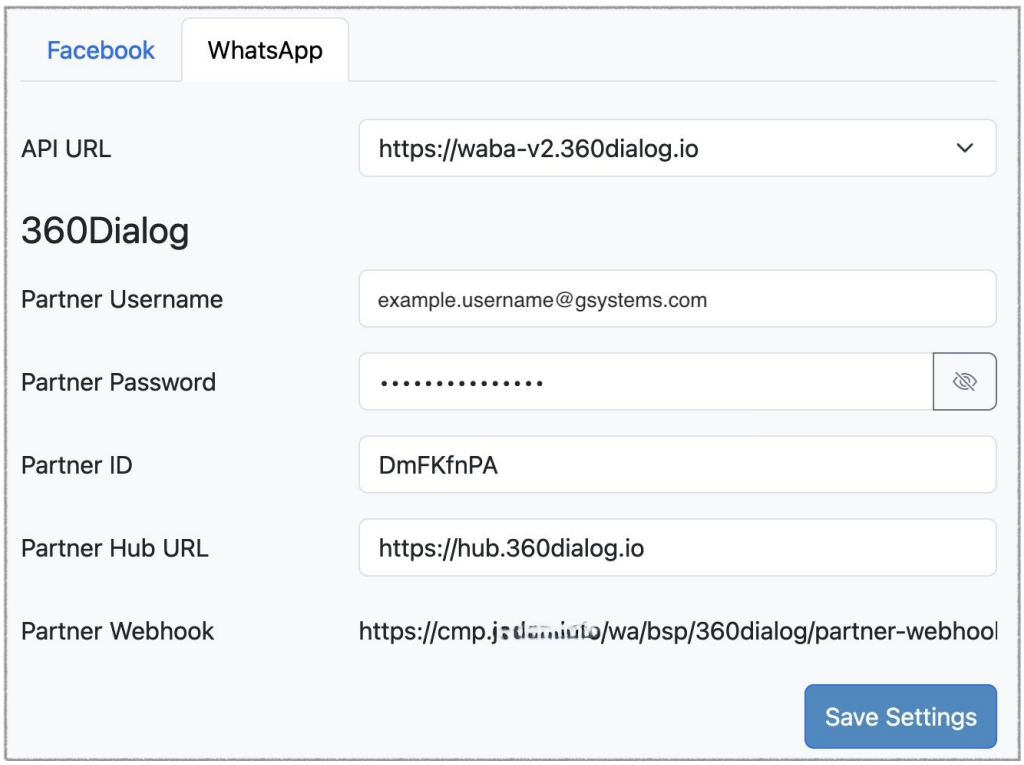

Figure 35. CMP WhatsApp Settings

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.

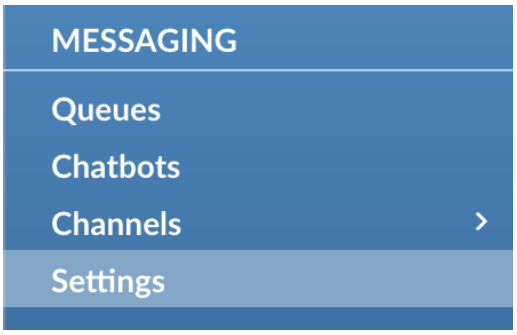

Figure 36. Pbxware Settings

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.

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.

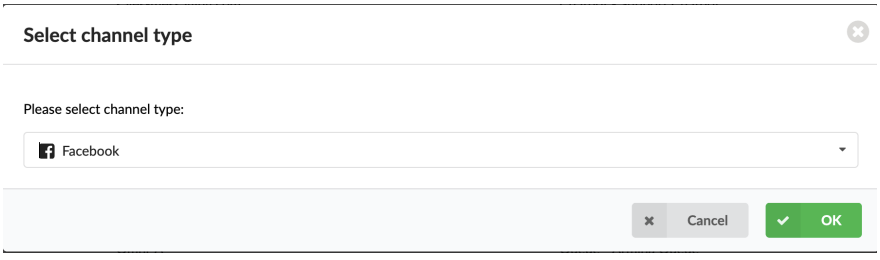

Figure 39. Facebook Channel Type

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.

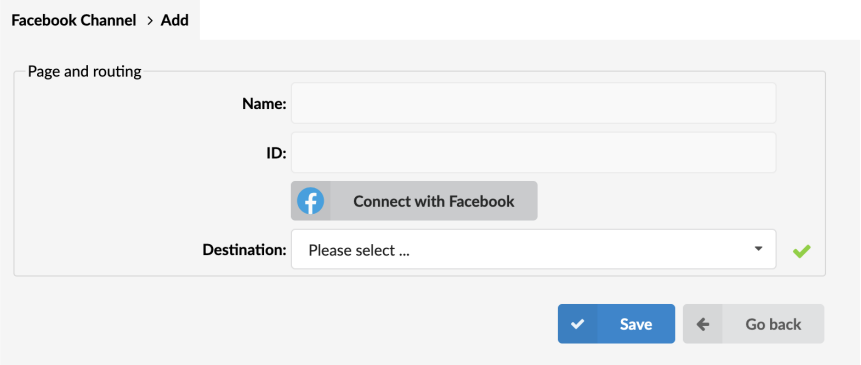

Figure 40. Setting Up Facebook Channel

- 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.

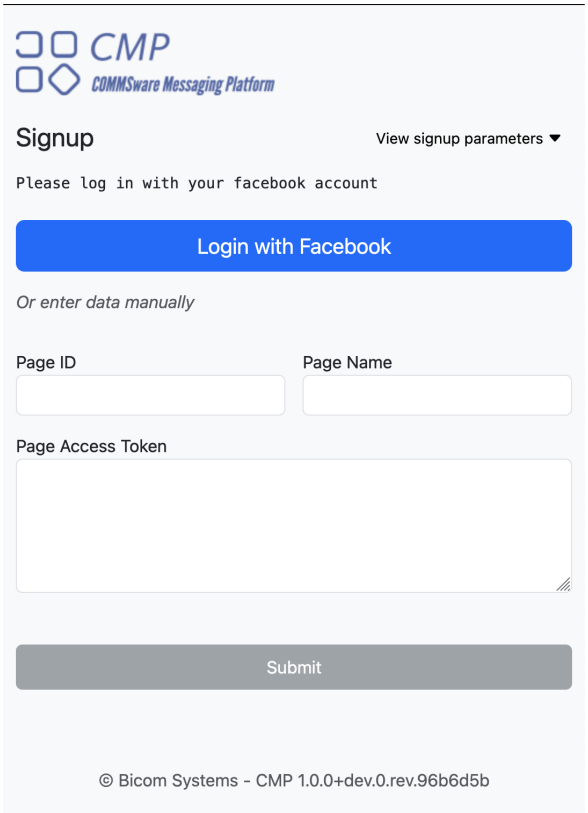

Figure 41. Setting Up CMP

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.

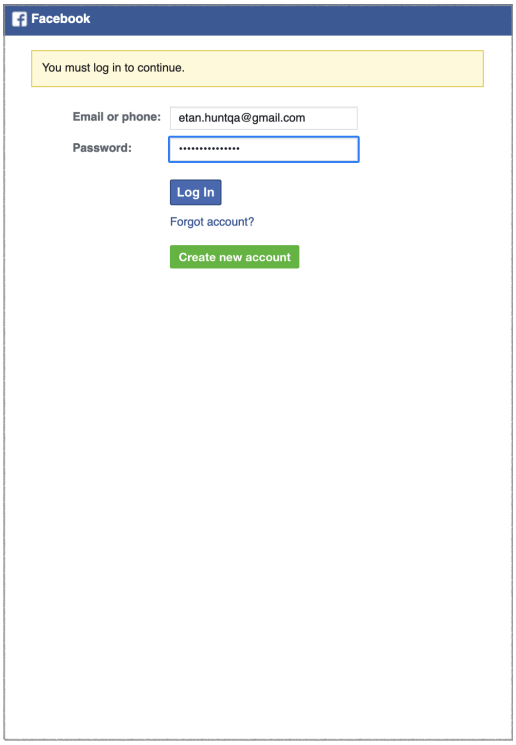

Figure 42. Login with Facebook

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:

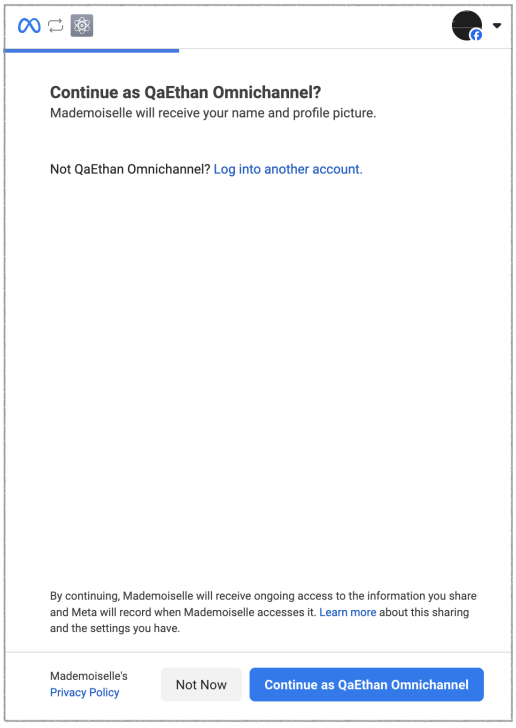

Figure 43. Login with Facebook

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:

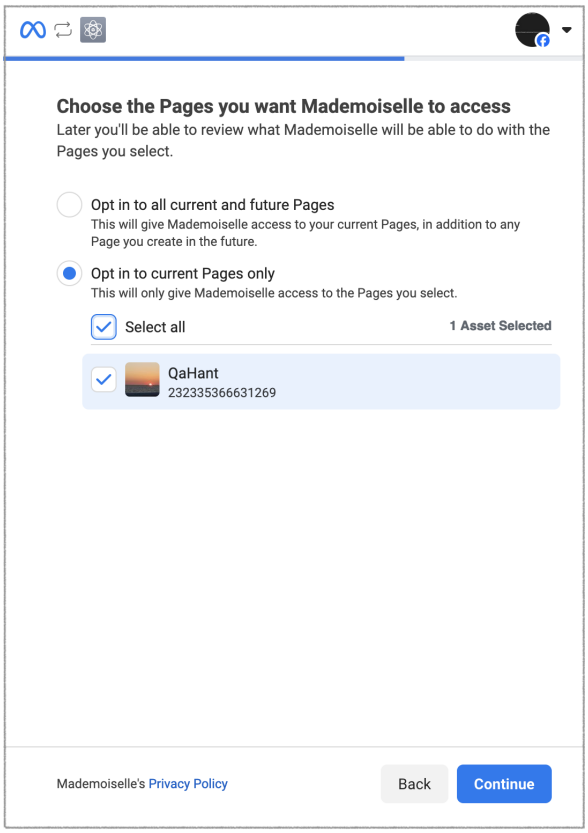

Figure 44. Meta Access

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:

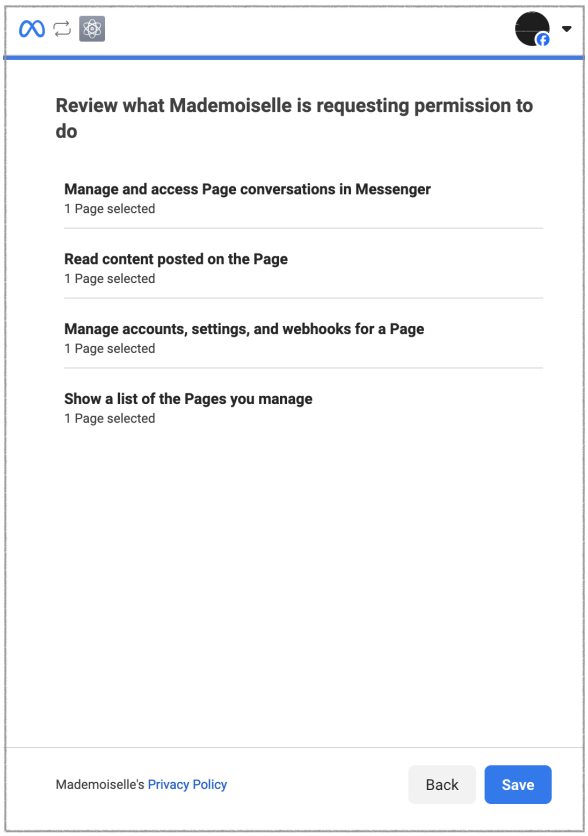

Figure 45. Meta Review

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:

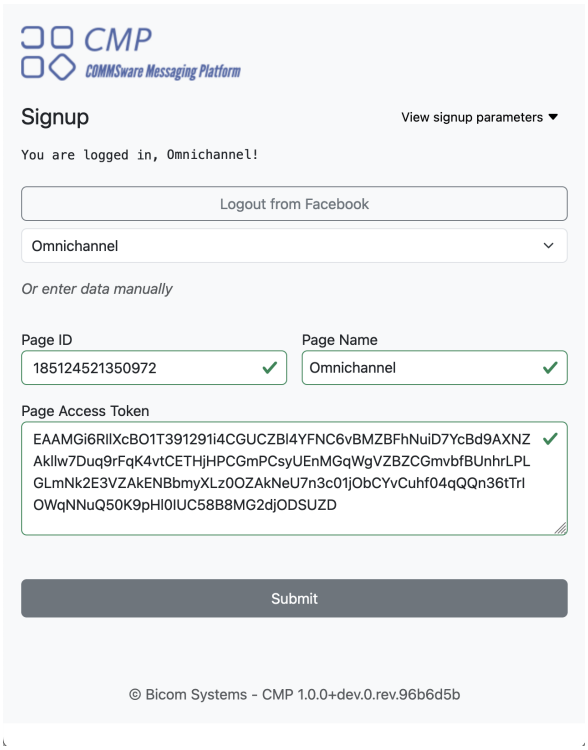

Figure 46. Populated CMP

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.

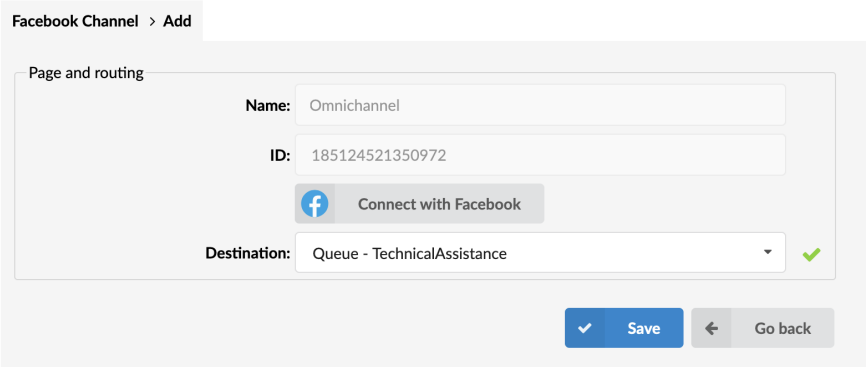

Figure 47. Sumbit The CMP

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.

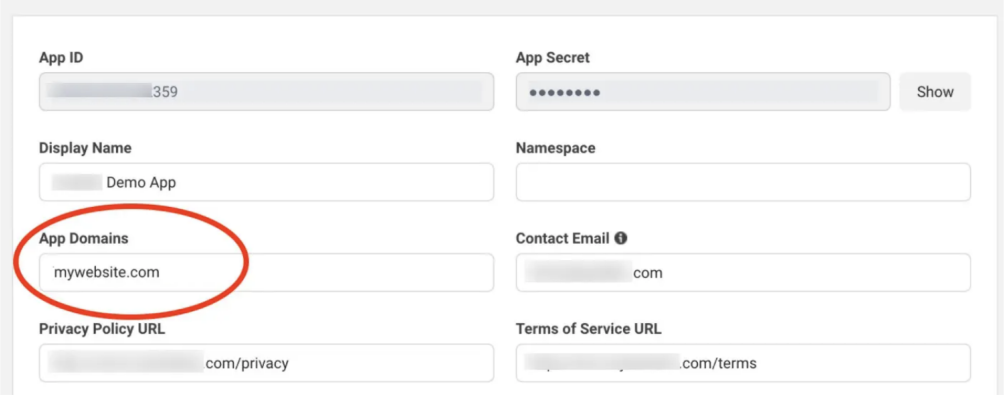

Figure 48. App Domains

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.

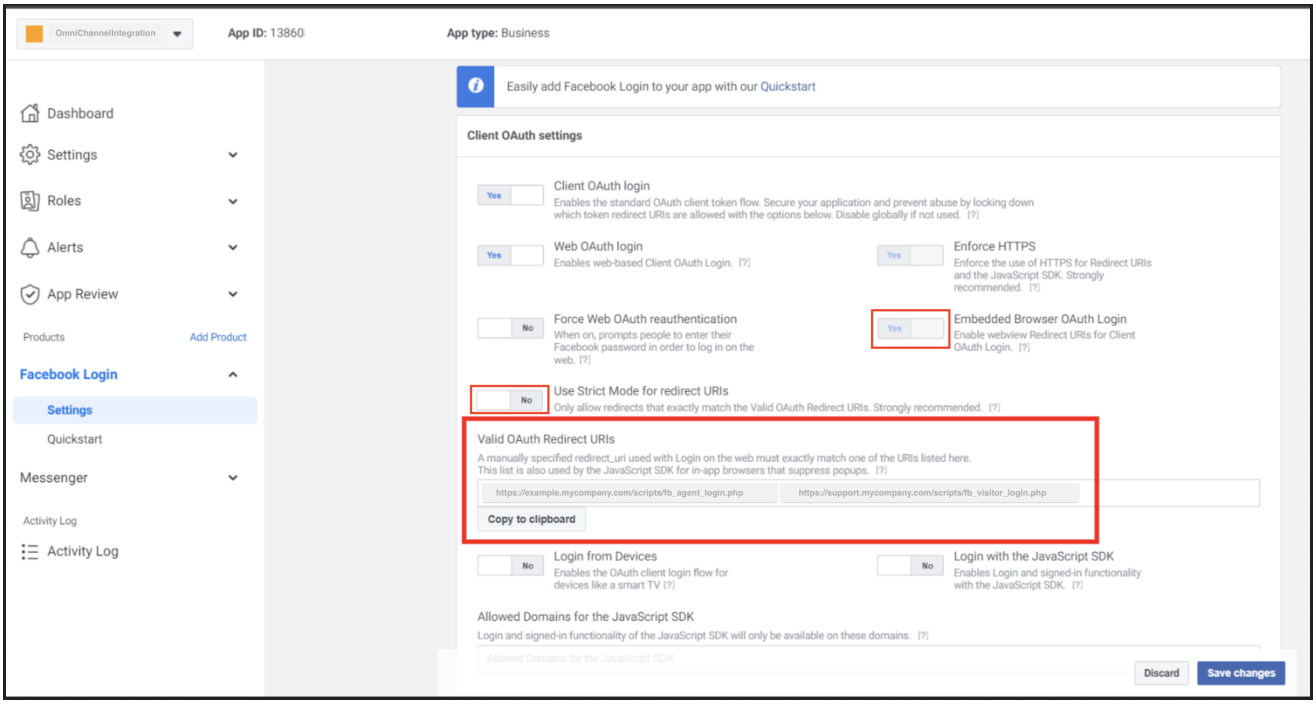

Figure 49. Client OAuth Settings

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.

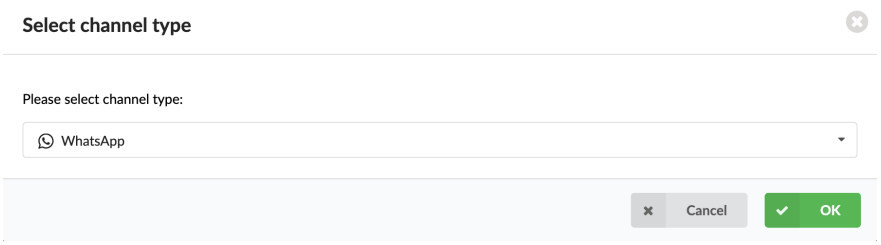

Figure 51. WhatsApp Channel Type

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.

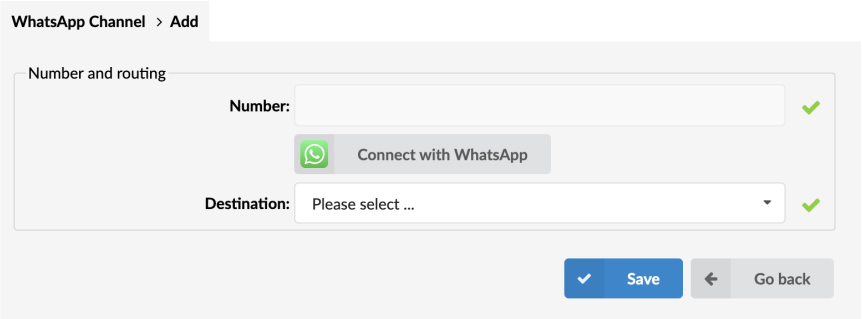

Figure 52. Setting Up WhatsApp Channel

- 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.

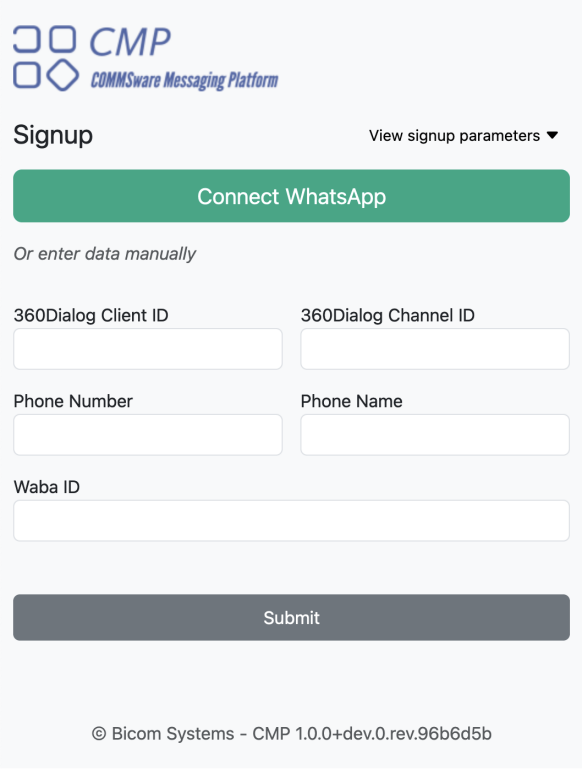

Figure 53. Setting Up CMP

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.

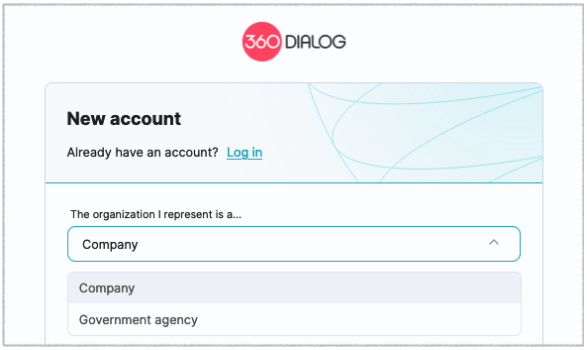

Figure 54. Sign Up for 360Dialog

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.

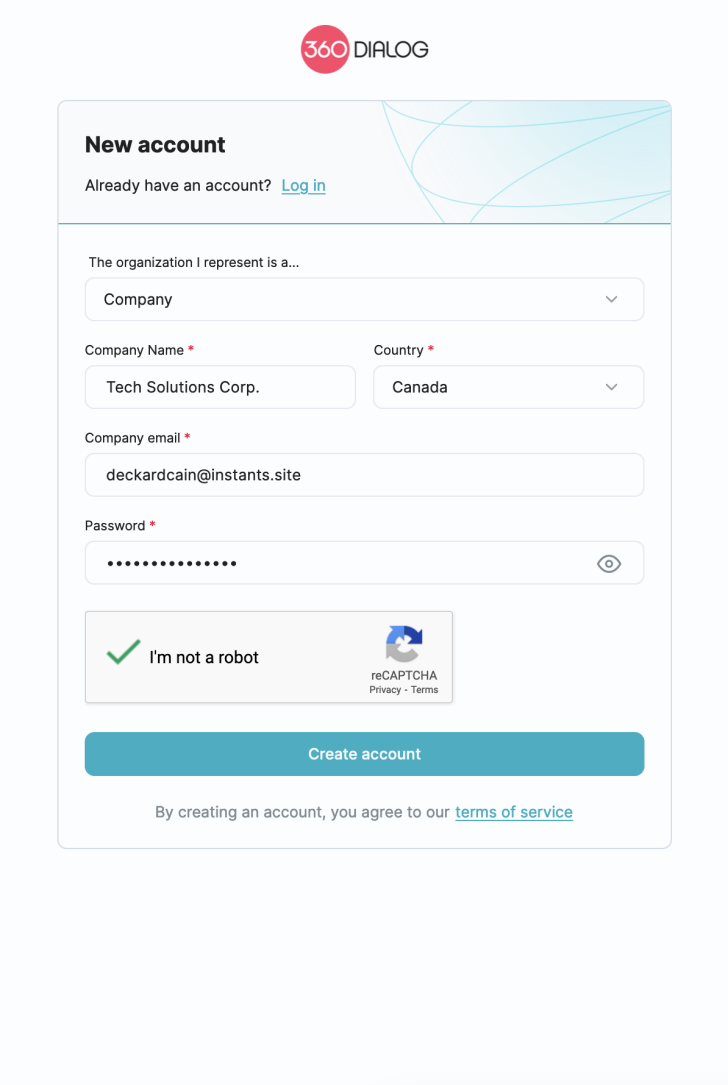

Figure 55. Sign Up for 360Dialog

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.

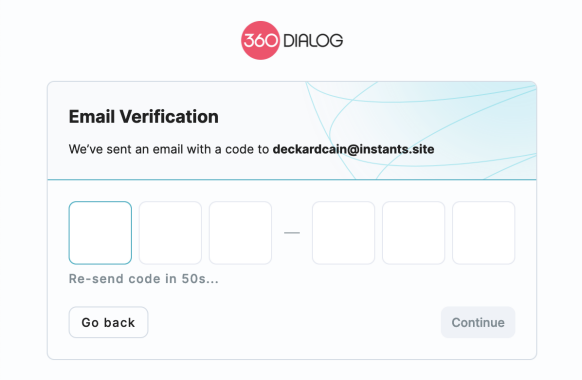

Figure 56. Verify Your Email

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.

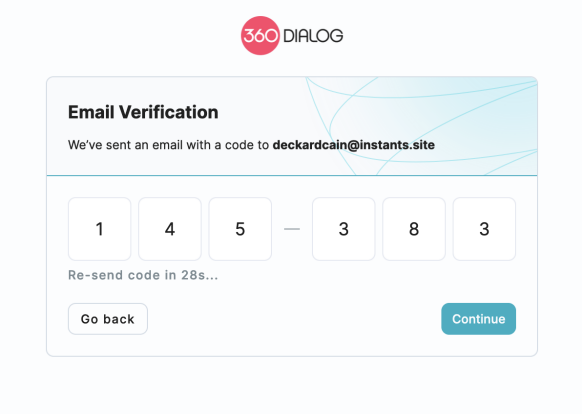

Figure 57. Verify Your Email

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.

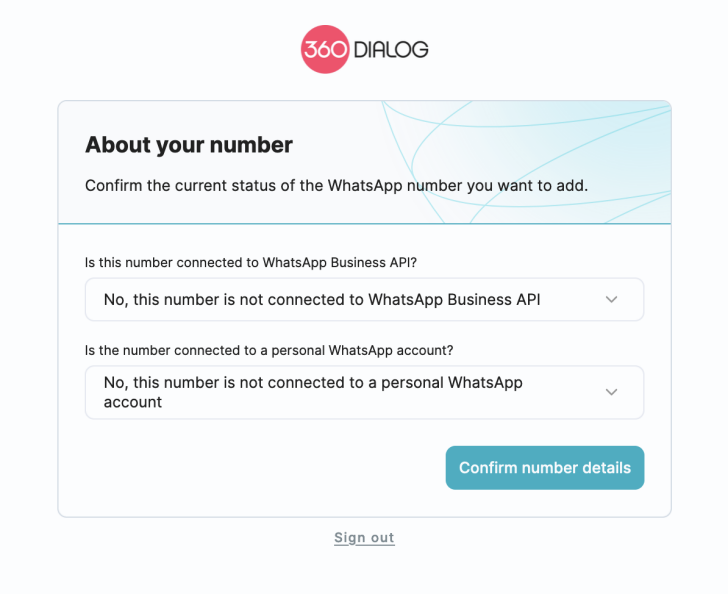

Figure 58. Information About Your Number

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.

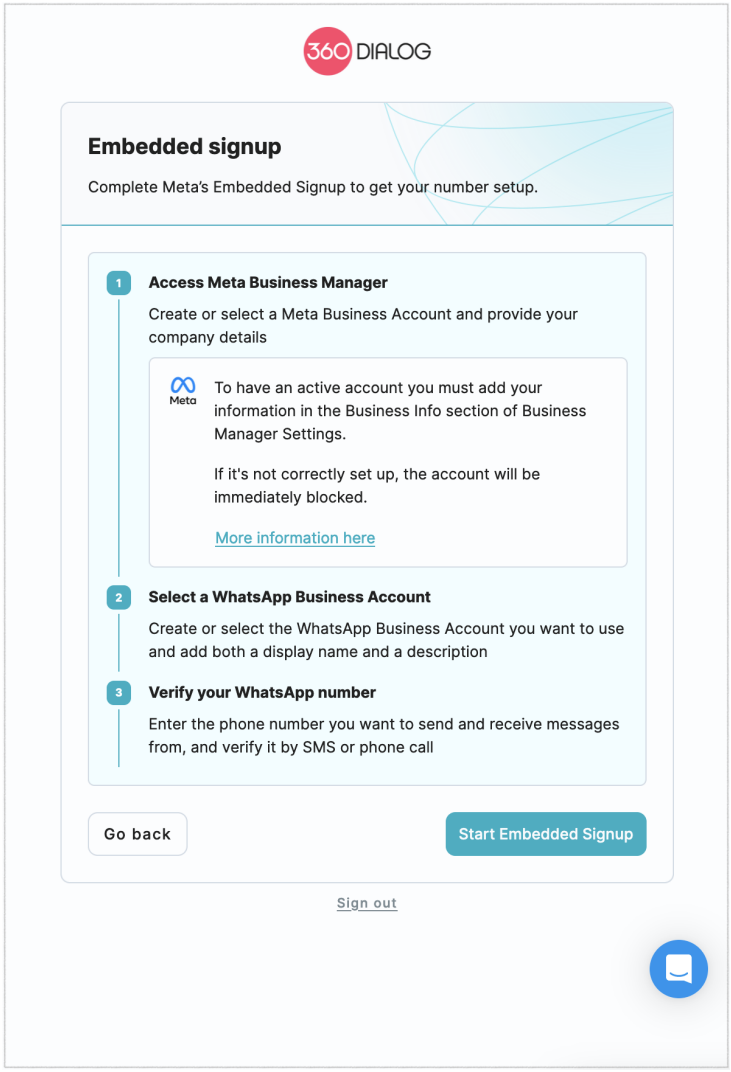

Figure 59. Embeded Signup

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.

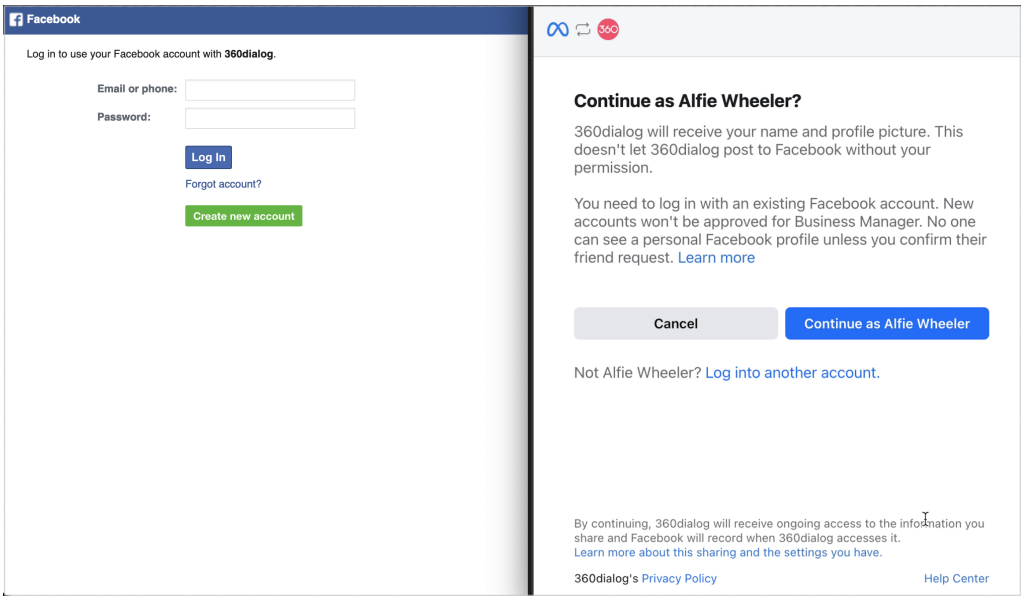

Figure 60. Continue With Facebook

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

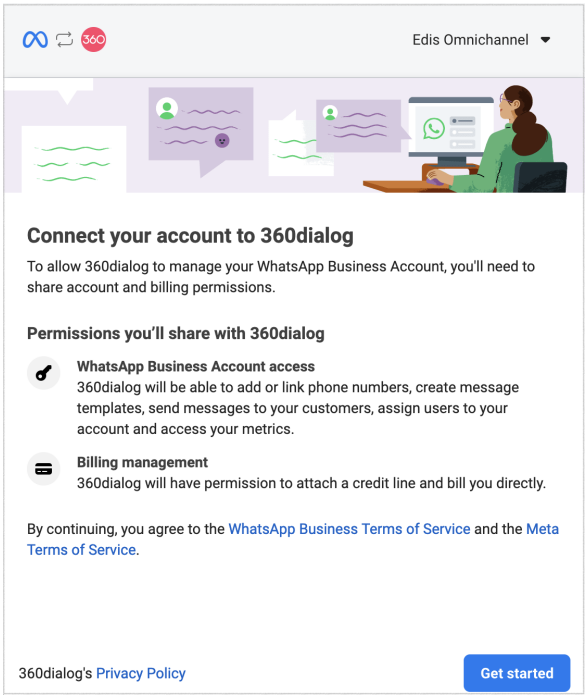

Figure 61. Get Started

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

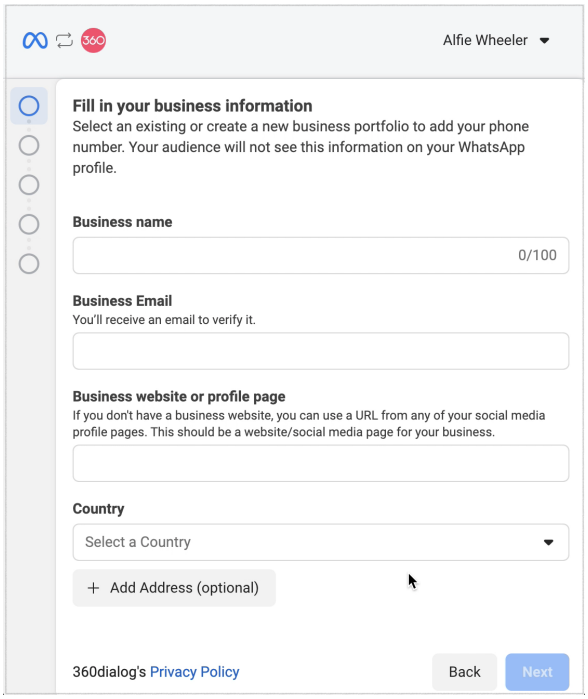

Figure 62. Business Info

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.

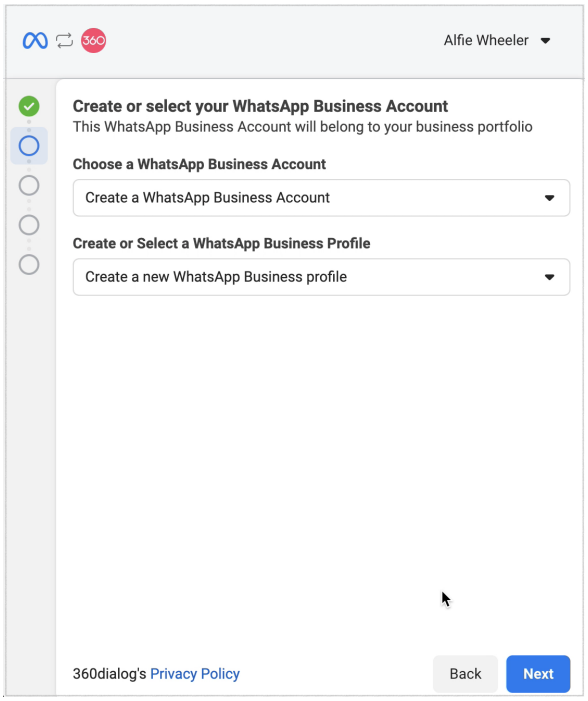

Figure 63. Business Account and Profile

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.

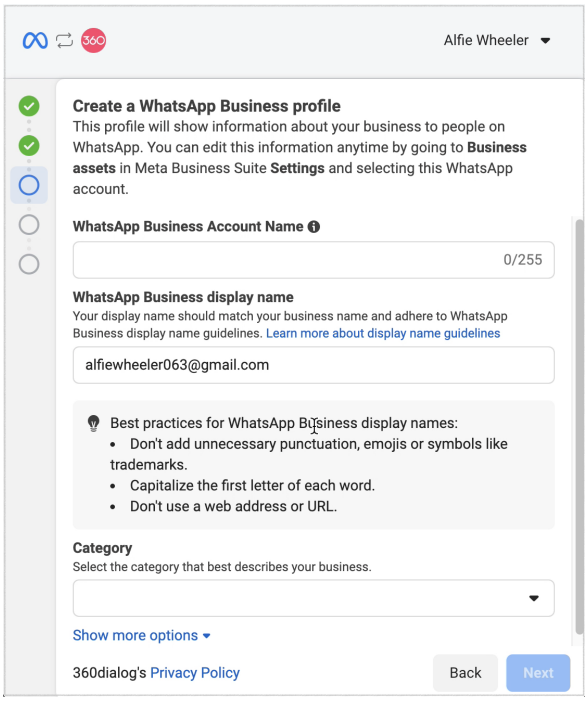

Figure 64. Create Business Profile

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.

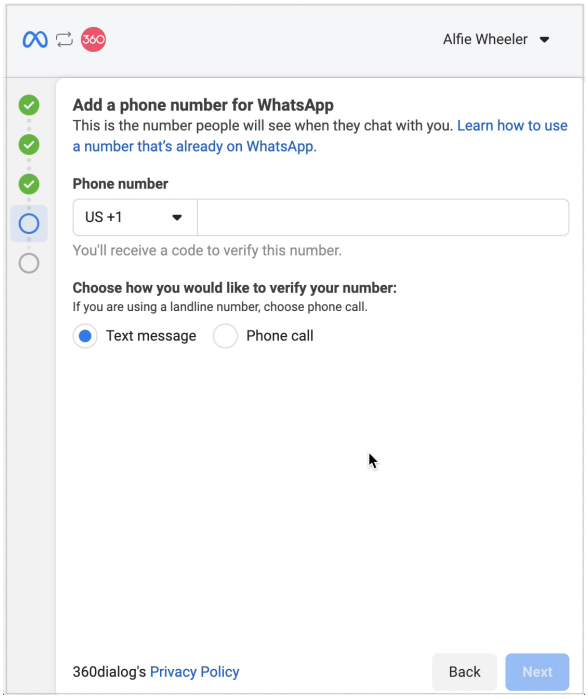

Figure 65. Add Phone Number

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

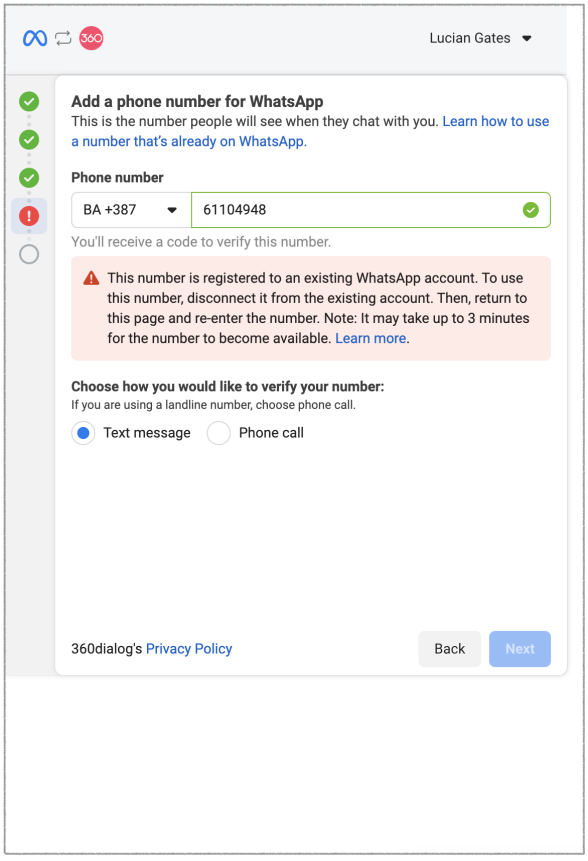

Figure 66. Failed to Add Phone Number

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.

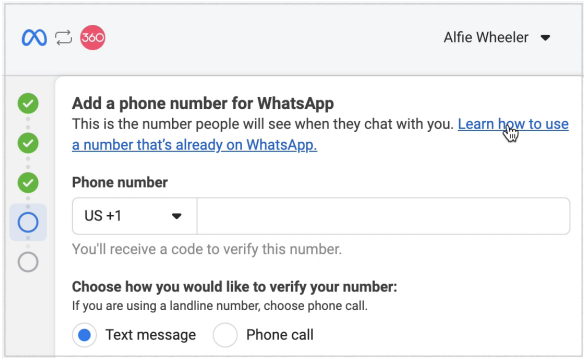

Figure 67. Instructions

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

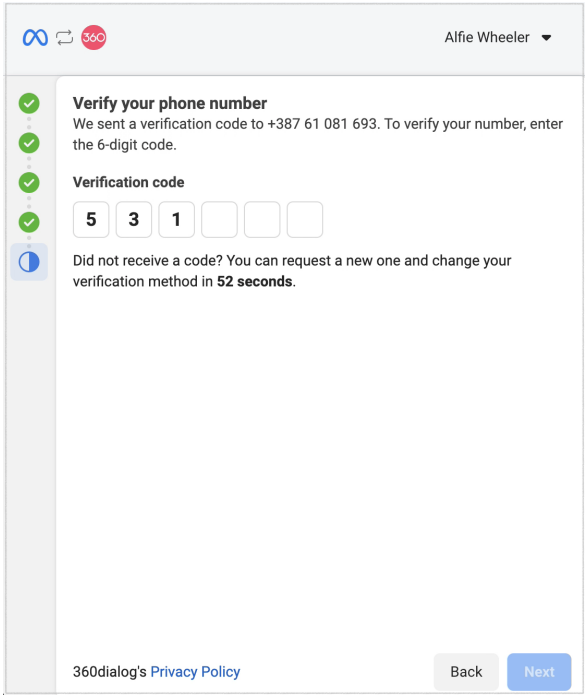

Figure 68. Verification Code

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.

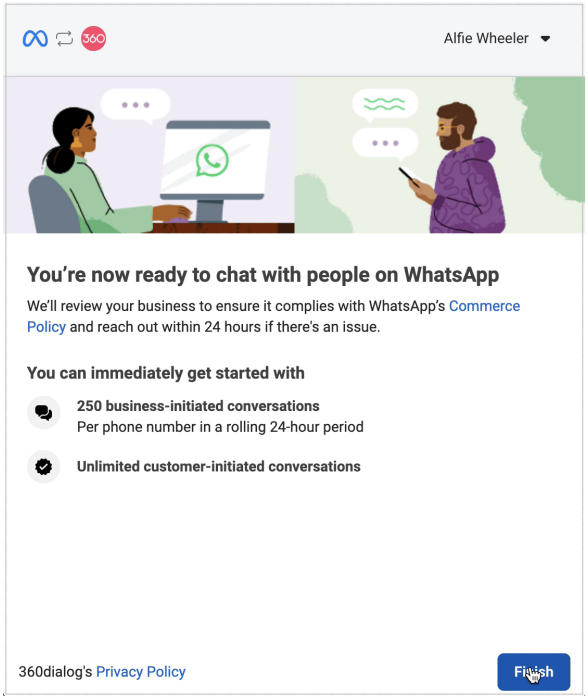

Figure 69. Finish the Setup

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.

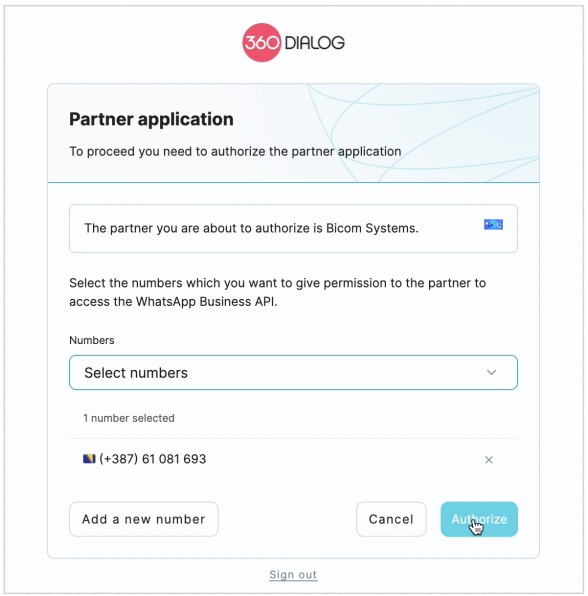

Figure 70. Grant Permission for Number

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

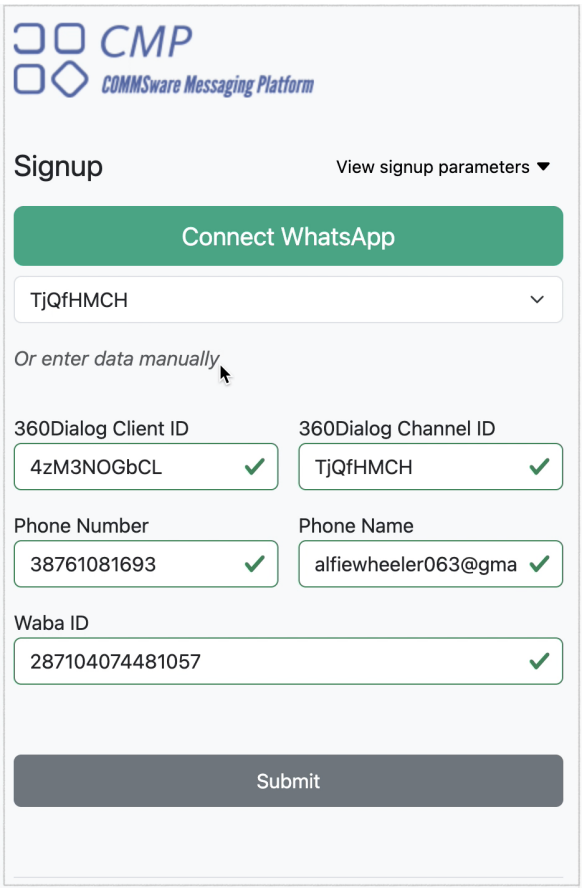

Figure 71. CMP Window Polulated

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.

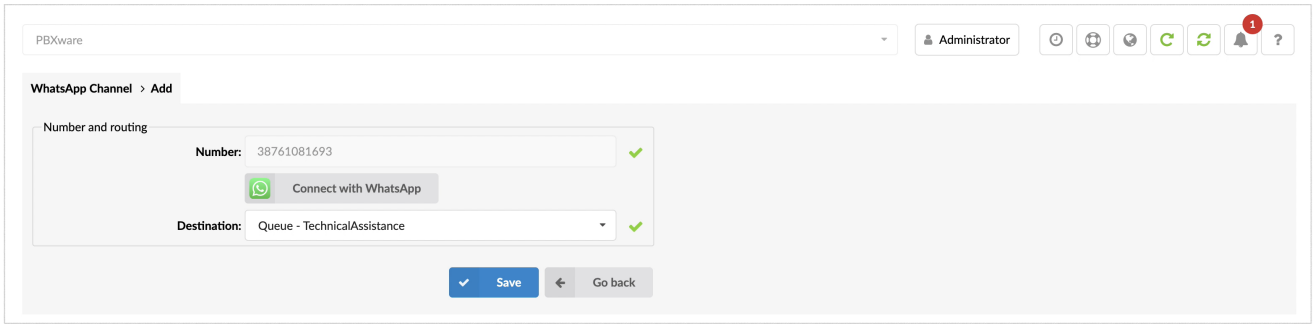

Figure 72. Successfully Completed Process

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.

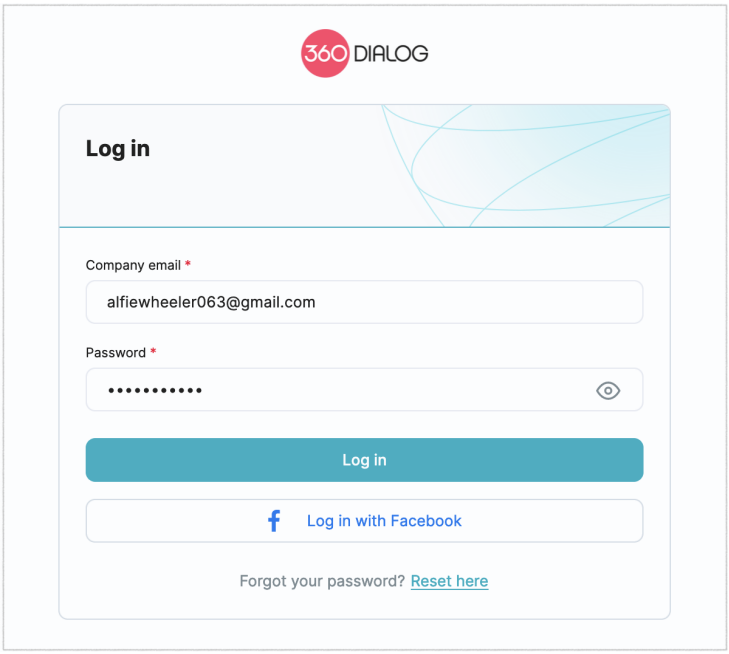

Figure 73. Login with 360 Dialog Account

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.

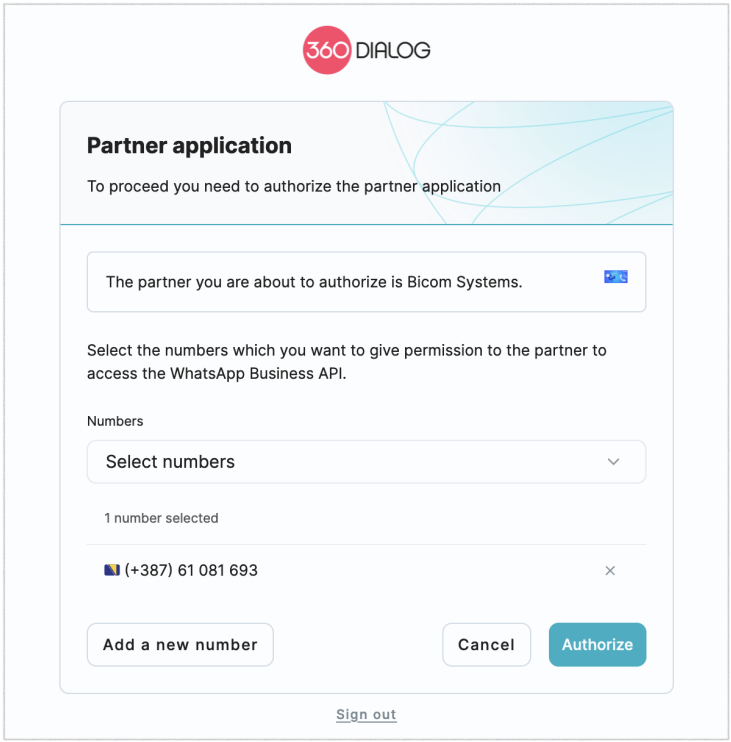

Figure 74. Select Number

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

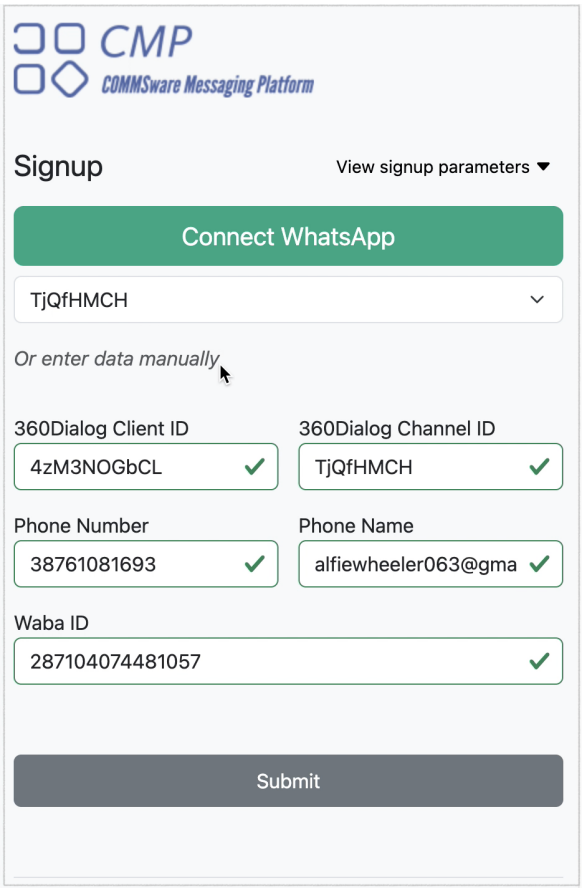

Figure 75. CMP Window Polulated

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.

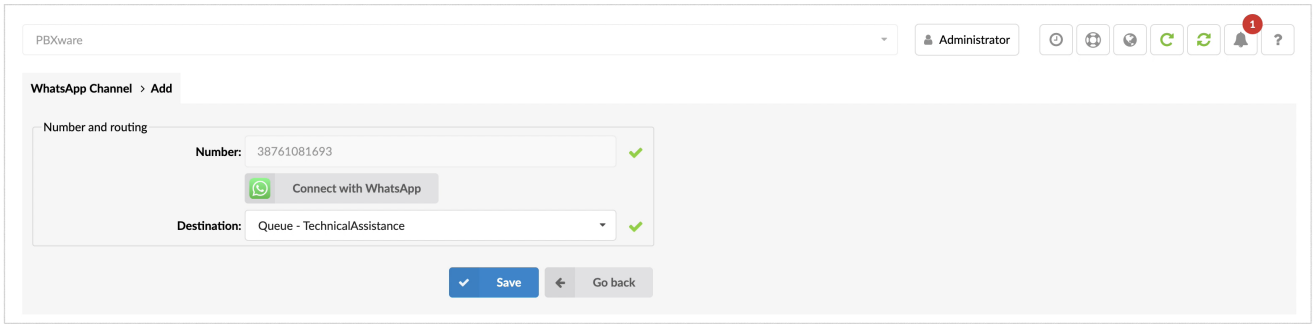

Figure 76. Successfully Completed Process

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

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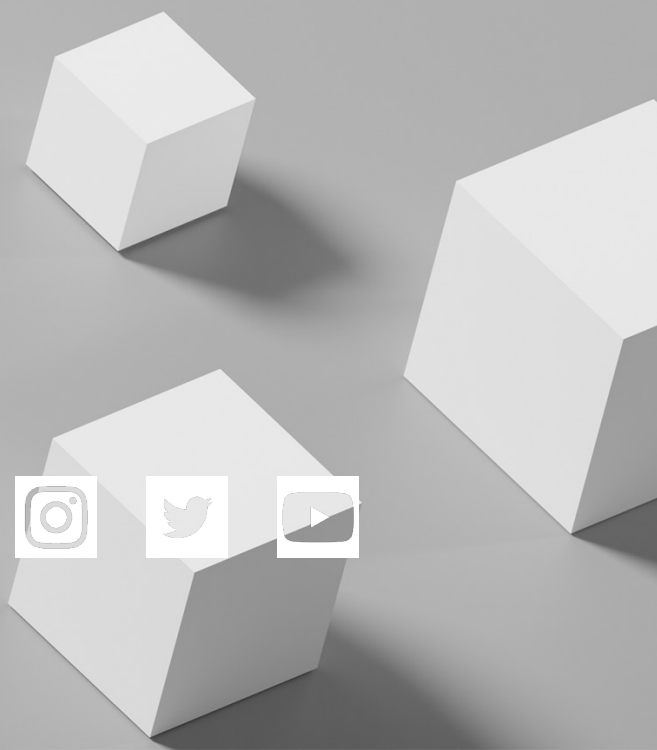

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