

BGLOBAL WhatsApp Add-on

Enhance Customer Engagement and Boost Productivity with our WhatsApp-Creatio Integration.

Revolutionize your customer communication strategy with this seamless integration between Whatsapp and Creatio. This powerful add-on streamlines communication on the world's most popular messaging platform, WhatsApp, enabling you to effortlessly connect with your customers while leveraging the full potential of your Creatio environment.

Effortless Communication:

- With WhatsApp-BGlobal integration, sending and receiving messages on WhatsApp becomes a breeze directly from your Creatio interface.
- Say goodbye to complex setups and technical hurdles; our simple setup process requires no coding or technical expertise, ensuring a smooth integration experience.
- Easily convert WhatsApp messages into cases within Creatio, facilitating efficient management of customer inquiries and issues.
- Ensure consistency in messaging with synchronized message templates, allowing for uniform communication across all customer interactions.
- Utilize the new element process "BGlobal: Send WhatsApp Template" to send pre-defined WhatsApp templates directly from your business processes, streamlining communication workflows.

Seamless Chat Capabilities:

- Empower your service agents with seamless chat capabilities, enabling them to engage with customers in real-time directly through WhatsApp.
- Enjoy direct integration with META APIs, enhancing the flexibility and functionality of your communication processes.
- Take advantage of the capability to create chatbots using Meta templates and business processes, allowing for automated responses and streamlined customer interactions.
- Benefit from the flexibility of multiple (telephone) numbers, allowing for efficient management of communication channels and enhancing accessibility for customers.
- Transform your customer engagement strategy and elevate productivity with WhatsApp Add-on. Experience the power of simplified communication and seamless interaction, driving superior customer experiences and organizational success.

Installation Step by Step:

1. Request the corresponding licenses.
2. Install the BGlobal WhatsApp package.

3. Request support to enable anonymous authentication then follow the instructions in Additional Resources ([See step by step WS.pdf](#)).
4. Go to Studio Workplace.
5. Go to the BGlobal WhatsApp Chat Settings section.
6. Click on + Bglobal WhatsApp Chat channel.
7. Complete the following information:

a- Name = Reference name for the channel.

b- API Token = token provided by Meta.

c- API Phone Number Id = value provided by Meta.

d- Whatsapp Account Id = value provided by Meta.

e- Enable logs: you should check it if you want to enable logging.

f- Verification URL and Verification Token: Copy and paste this information into Meta after saving the channel.

-Once the channel is created, you can click on it and change the Chat queue associated with it. Ensure that the agents are in the corresponding queue.

-You can copy the channel to use the same Meta App but using different phone numbers.

-Message templates: Upon approval from Meta, the endorsed templates are seamlessly integrated into Creatio, becoming readily accessible for utilization either through the chat communication panel or via the business process.

-Use the New element process “BGlobal: Send WhatsApp Template” to send Whatsapp templates from Business processes.

Notes

- A Meta developer account
- A business app

Additional Resources

- <https://developers.facebook.com/docs/whatsapp/cloud-api/get-started/>
- [Enable HTTP/S support for a custom web service that uses anonymous authentication](#)