Install Cooby WhatsApp integration for Creatio

Enhance customer communication and streamline workflows with the Cooby WhatsApp integration for Creatio, powered by the Cooby platform.

This app allows you to:
- **Capture essential conversations:** Gain valuable insights into how your team interacts with customers on WhatsApp.
- **Evaluate team performance:** Track activities and ensure alignment with business goals.
- **Boost productivity:** Simplify workflows and save time by integrating WhatsApp with Creatio's CRM functionalities.
- **Automate processes:** Easily sync conversations' history using webhooks and trigger automated actions within Creatio.

Install the app

To install the app, follow the instructions in Creatio documentation: [Install apps from the Marketplace.](#)

Set up the app

Before you begin, ensure you have the following in place:

Customer360 App: This app must be [installed](#) on your Creatio site.

Webhook URL: Obtain a Webhook URL by following the instructions found here:
[https://academy.creatio.com/docs/8.x/no-code-customization/base-integrations/webhook-service-integration/overview](#)[EV3]

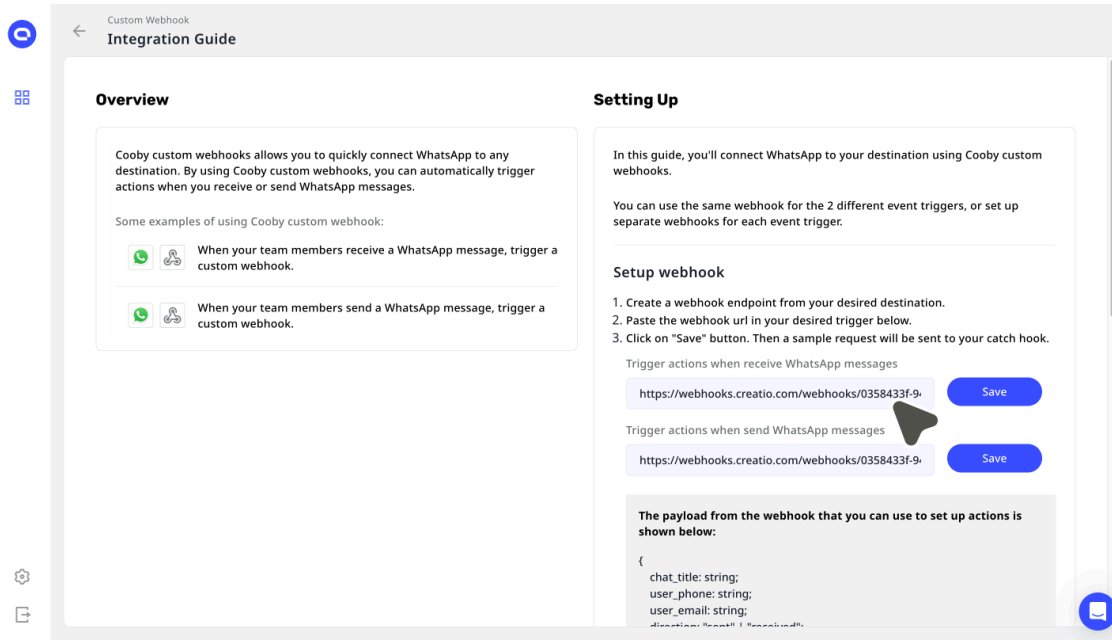Here's how to configure the Cooby extension:
1. Access the Cooby extension.
2. Go to your Workspace: Click the "Go to Workspace" button in the right-hand zone.
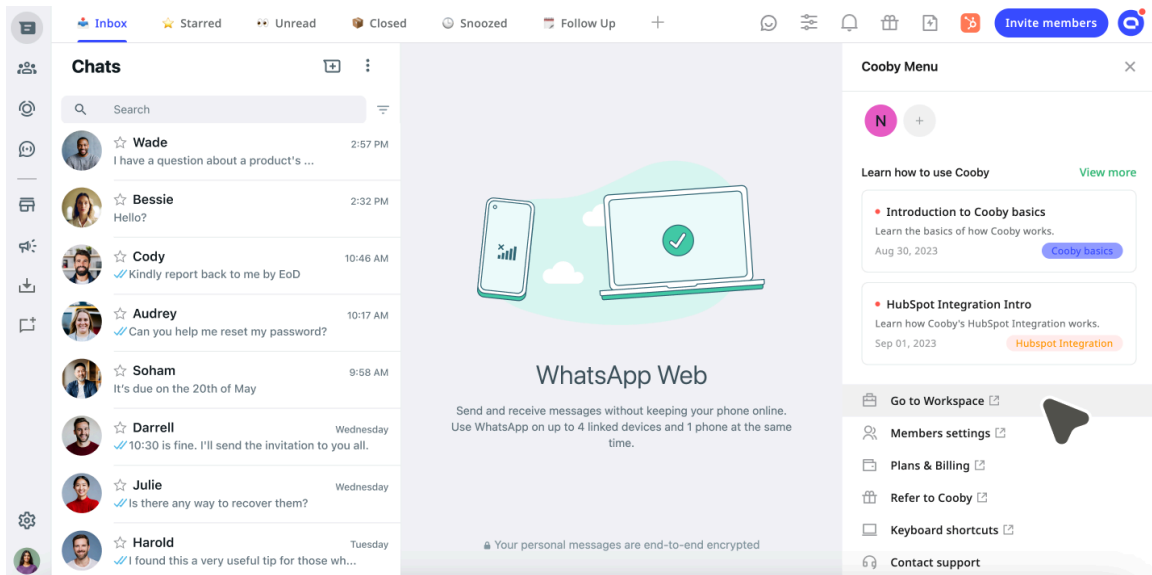
3. Configure Webhook:
   3. In the "Custom Webhook" block, select "Integration guide."
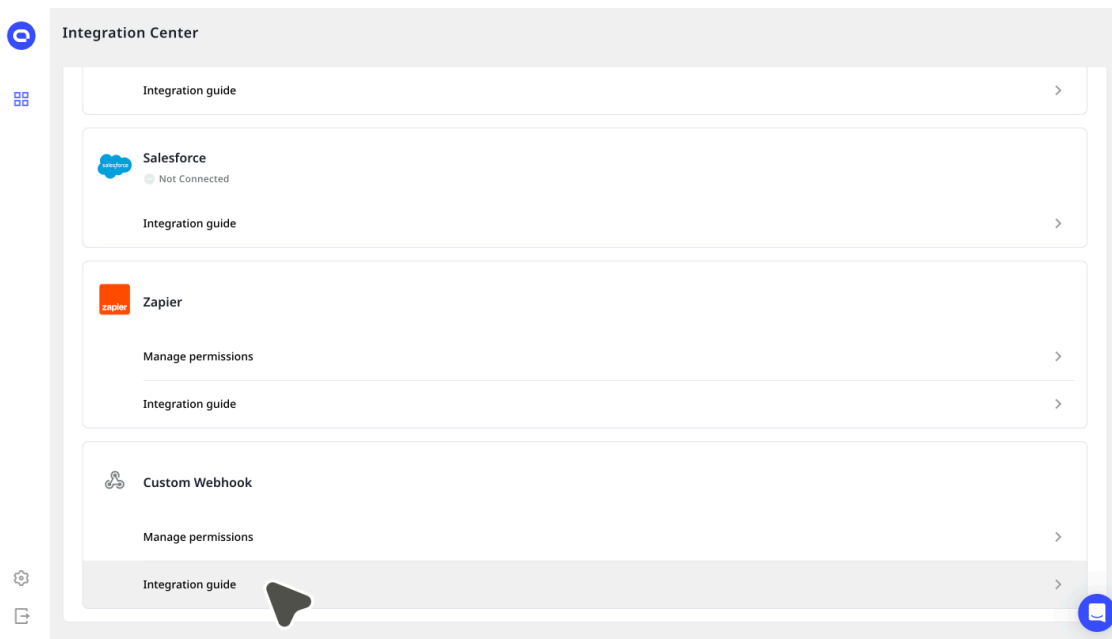
4. Navigate to point 3 under "Setup Webhook" and enter the Webhook URL you obtained from Creatio.

4. Save Changes: Click "Save" for both steps.

Testing the Integration

After completing the setup, you should receive two test webhooks in Creatio's Webhook service. These will trigger test processes within Creatio to confirm the successful integration.

Attention. After installing this app, the " Start process to create object records based on incoming webhooks" process version it provides will become the only active version. If you were previously using a custom process or another app that handled this functionality, you'll need to ensure your custom logic remains active.

Merge your custom process logic with the app's process logic. By creating a new version of the process, you can combine the functionalities of both for a seamless workflow.

Managing WhatsApp chats

Once Creatio and Cooby are connected, your WhatsApp conversations will automatically synchronize into Creatio. You can access and manage them within the

dedicated "WhatsApp chat" section.

Here's how Creatio handles incoming messages:
1. **New Chat Records**: For new conversations, Creatio will create a new chat record based on the phone number of the contact and the email address associated with the Cooby employee account – chat owner.
2. **Existing Chat Records**: If a chat record already exists for a contact, new messages will be linked to it using the same criteria (phone number and Cooby user's email). However, if a new message arrives from the same phone number but a different Cooby user's email, a new chat record will be created.
3. **Contact Management**: Creatio will attempt to find an existing contact record based on the phone number. If a match is found, it will be linked to the chat record. Otherwise, a new contact record will be created.
4. **Chat Ownership**: Creatio assigns ownership of the chat record to the user associated with the Cooby email address in the database, provided the user has an active account. An empty "Owner" field indicates that Creatio couldn't find a matching user.
5. **Manual Adjustments**: You can manually modify the assigned Contact or Owner for a chat record. Saving these changes will update all linked messages accordingly.

By leveraging the Cooby connector, you can gain valuable insights from your WhatsApp interactions and streamline your customer communication workflows within Creatio.