Psiog WhatsApp Connector Documentation

Contents

1. Document Info

Software Release:	V1.0
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2. Revision History

S No	Date of Modification	Change Made
1	18-07-2025	Document V1 Created

3. Purpose

The document is intended to provide functional and technical information about the connector to help users and admin understand the functionality and configure settings.

4. Connector Information

Integrating the WhatsApp Connector with Creatio enables seamless communication by allowing users to send messages directly from Creatio to a recipient's WhatsApp number.
The WhatsApp Connector serves as a bridge between Creatio and WhatsApp, facilitating real-time, automated messaging. This integration Enables targeted messaging for promotions, reminders, and follow-ups.

5. Build Information

S No	Particular	Details
1	Version	1.0
2	Creatio Version Compatibility	8.0 and up
3	Creatio Product	Across all products
4	Database	Postgres, MS SQL
5	Operating System	Windows
6	Platform	.NET Framework 4.7
7	Dependent Packages	CrtCore, CrtCustomer360App
8	Environments supported	On-Premise,Cloud

6. Features

- The WhatsApp Connector seamlessly integrates WhatsApp messaging into Creatio, enabling automated, real-time communication directly from the platform.

- This connector is powered by a business process element, allowing users to configure workflows, automate messaging, and enhance customer interactions without manual intervention.
- It supports sending messages individually or as a bulk campaign to multiple recipients.
- It supports sending text messages and links to images and videos (except plain text links) using predefined templates, as well as plain text messages, both with a character limit of 1600.
- Every WhatsApp interaction is recorded and accessible in the WhatsApp History section.
- Each recipient's messaging history is individually recorded under the WhatsApp History tab in their contact profile.
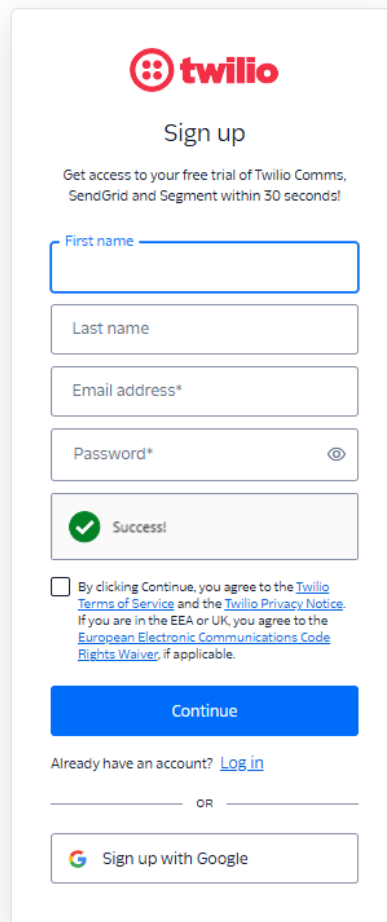
7. Control Points

- A message can be sent to only one contact at a time, and the contact ID should be mapped exclusively to the recipient.
- The connector supports text messages and message templates exclusively.

8. Overview

8.1 Twilio Setup

- Create a Twilio Account: If a Twilio account is not available, sign up using the link Twilio.Please note that the purchase of this connector does not include any additional Twilio licenses. To learn more about Twilio licensing or to upgrade your account, visit Twilio Licenses
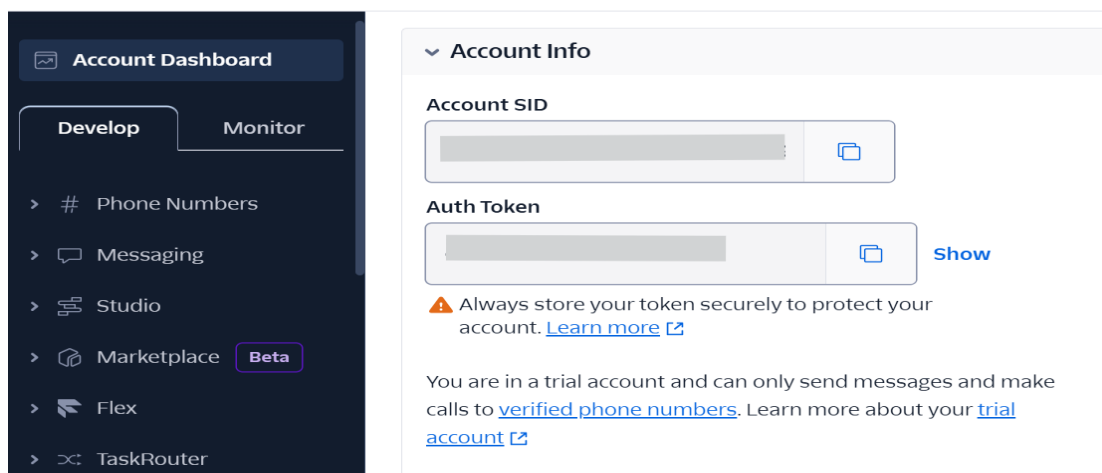
- Once a Twilio account is set up, the Account SID, Auth Token, and WhatsApp Sender Number will be generated
- Navigate to Action Dashboard > Develop > Account info to access the messaging feature.
- Use those credentials to configure the system settings as outlined below.

8.2 Configuring System Setting Values

A system settings folder titled 'WhatsApp connector' contains all the necessary system settings to be configured for the functioning of the connector.

| System Setting Name	Code	Purpose
Twilio account SId	PsgTwilioAccountSId	Stores the Twilio Account SID credential.
Twilio auth token	PsgTwilioAuthToken	Stores the Twilio Auth Token credential.
Twilio phone number	PsgTwilioPhoneNumber	Used to store the Twilio WhatsApp sender number in the system settings, if required. This allows the sender number to be configured and referenced in process elements through the system setting.
WhatsApp max retry	PsgWhatsAppMaxRetry	Defines the maximum number of retry attempts if message sending fails. Note:It is recommended to set this to a maximum of 5 retries.
WhatsApp session timeout	PsgWhatsAppSessionTimeout	Specifies the waiting period before attempting to resend a message.Note: It is recommended to set this to a maximum of 10 seconds.

8.3 Walk-Through

- Navigate to the "Contacts" section in Creatio, open the communication options, and choose WhatsApp from the available phone communication types. Enter a number registered on WhatsApp.
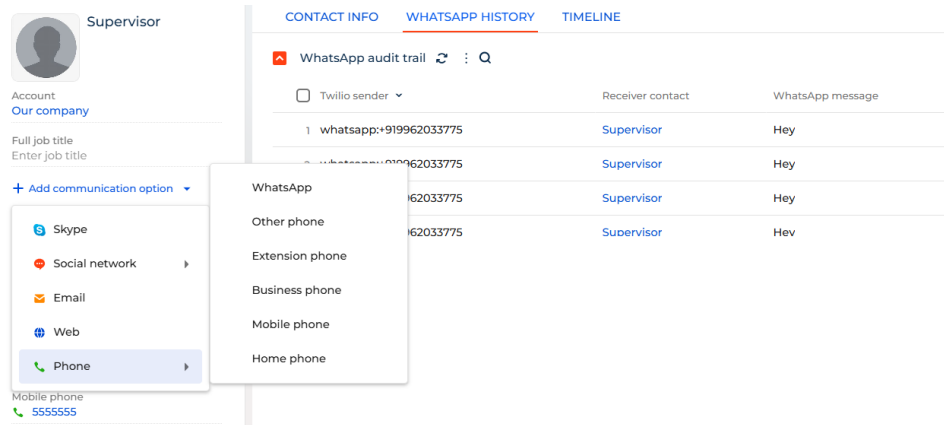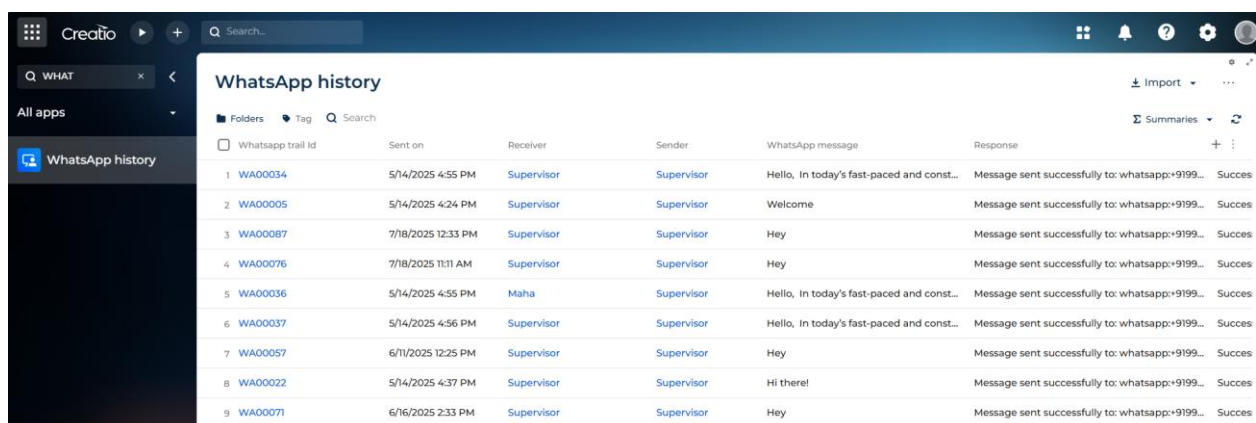
- A new 'User Action' named 'Send WhatsApp Message' will become available for use in business processes.
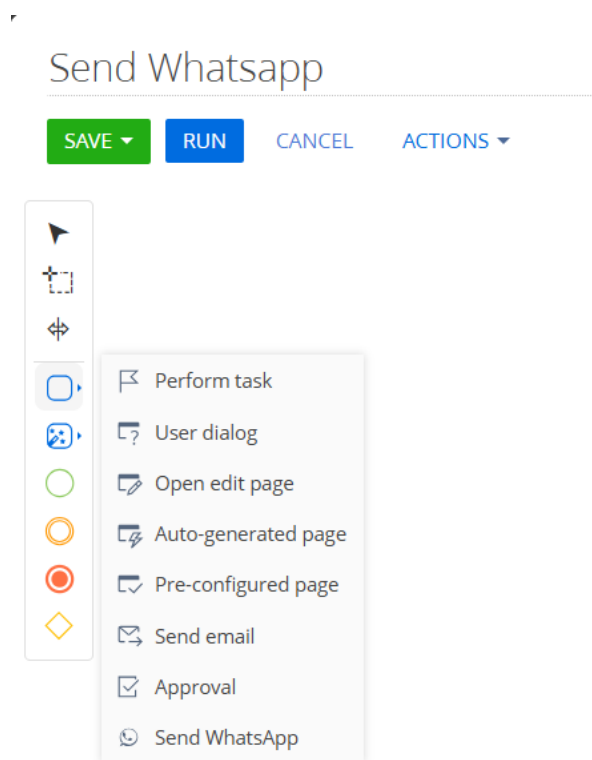
- Within the Business Process, fill all the required fields. The "From" field represents the sender which is a common Sender number which is registered with Twilio , and the "To" field specifies the recipient
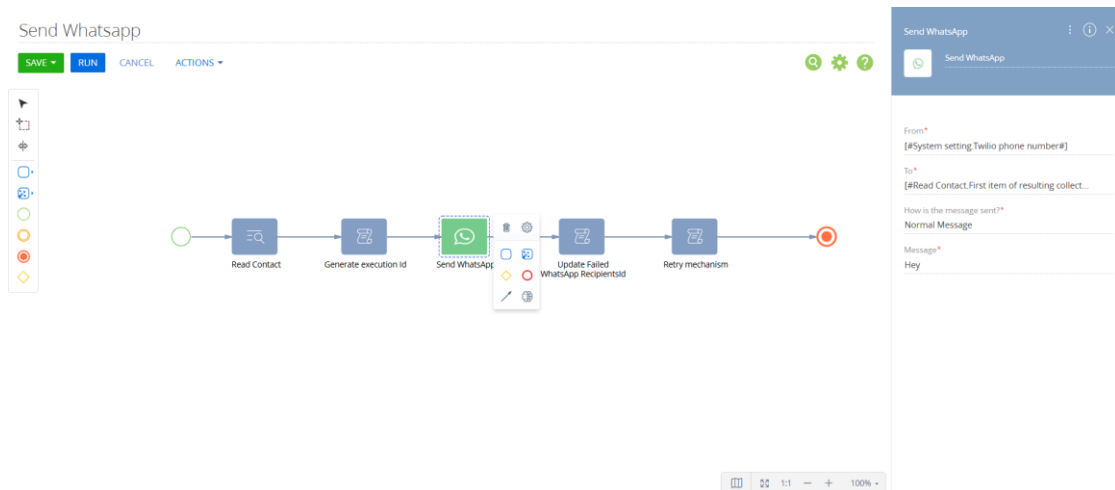
- The "How is the Message Sent?" field offers two options: "Normal Message" and "Template Message."
- Choosing "Normal Message" displays a text input field, allowing users to enter a custom message manually.
- Choosing "Template Message" enables the "Message Template" dropdown, allowing users to select a predefined template.
- Once the business process is executed, the system will display a system notification within the notifications panel.
- If a message fails to send due to a server-side error, the system will attempt to resend it based on the max retries and session timeout settings defined in the system configuration.
- The message, along with its status, response, and number of attempts, will be logged in the WhatsApp History section.

- The WhatsApp message status and response will also be displayed in the recipient's contact details under the WhatsApp Audit Trail detail, within the WhatsApp History tab.

CONTACT INFO   WHATSAPP HISTORY   TIMELINE

WhatsApp audit trail

	Twilio sender	Receiver contact	WhatsApp message	Response
28	whatsapp:+14155238886	Supervisor	Hello, In today's fast-paced and c...	Failed to send message.Please
29	whatsapp:+14155238886	Supervisor	Welcome	Please enter valid Twilio creade
30	whatsapp:+14155238886	Supervisor	Hey	Non-retryable error: Please cont
	whatsapp:+14155238886	Supervisor	Welcome	Please enter a valid WhatsApp