USER GUIDE
Whatsapp Add-On for
Creatio

Index

Introduction

Welcome to the user guide for our groundbreaking product: the WhatsApp-Creatio Integration. This innovative tool is designed to revolutionize your customer communication strategy by seamlessly merging WhatsApp, the world's most popular messaging platform, with Creatio. With this integration, you can enhance customer engagement, boost productivity, and unlock the full potential of both platforms. This user guide will provide you with comprehensive instructions on how to leverage the features and capabilities of this integration to streamline communication and drive success in your business endeavors.

Functionality

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.
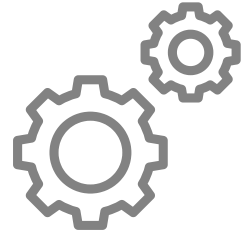
Introduction

- 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.

1. Install the BGlobal WhatsApp package.

1. Request support to enable anonymous authentication then follow the instructions in Additional Resources (See step_by_step_WS.pdf).

1. Go to Studio Workplace.

1. Go to the BGlobal WhatsApp Chat Settings section.

1. Click on + Bglobal WhatsApp Chat channel.

1. 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.

Also:

- 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.

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Terms & Conditions

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Terms & Conditions

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