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Social Media Solution Guide

Creating a WhatsApp Channel

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Creating a WhatsApp Channel

Genesys Hub supports WhatsApp Business and includes an API connector for WhatsApp. The WhatsApp channel allows consumers to connect with brands and brands to connect with consumers from the WhatsApp Messenger app on their smartphone. This document describes how to create and activate a WhatsApp channel in Genesys Hub.

This topic contains the following sub-topics:

- [Prerequisites](#)
- [Creating a Hub account](#)
- [Creating a WhatsApp channel](#)
- [Registering a WhatsApp channel](#)
- [Activating a WhatsApp channel](#)
- [Migrating your existing phone number from other CSP to Genesys](#)
- [Adding a business profile](#)

[Link to video](#)

Prerequisites

Important

Brands must obtain the required approvals from WhatsApp to use WhatsApp Business. Purchasing a Genesys Engage product from Genesys does not constitute an approval by WhatsApp to use the software. For more information on WhatsApp policies, refer to <https://www.whatsapp.com/legal/commerce-policy/>.

- You must have a designated business number that complies with the WhatsApp requirements and is able to receive voice calls and text messages (SMS). For information on the requirements, refer to <https://developers.facebook.com/docs/whatsapp/guides/phone-number>.
- You must have a valid GARN code to complete the WhatsApp on-boarding setup. When you buy a Genesys product, you receive a GARN code which is used for billing purposes.

Creating a Hub account

The first step of deploying a WhatsApp channel is to create an account within the Hub component of Social Engagement. Refer to the [Create an Account](#) section for instructions on how to set up an account. You can also log in with your existing account if you are already a registered Hub user.

Creating a WhatsApp channel

1. Log on to your Hub account via <https://socialanalytics.genesyscloud.com> .

Important

We recommend that you always use <https://socialanalytics.genesyscloud.com> to access Hub. But if you prefer a static URL, you can alternatively use <https://static.socialanalytics.genesyscloud.com> .

2. Click **Add Channel**. The **New Channel** page is displayed.
3. Select **WhatsApp: Service** from the **Channel Type** drop-down list.
4. Choose **Genesys Engage Premise** from the **Platform** drop-down list.
5. Enter your business phone number in the **Business Phone Number** field.

Important

- If you want to create more than one WhatsApp channel, you must use a unique phone number for each channel.
- If your phone number is registered with other CSP (Content Service Provider) and you want to migrate to Genesys, you can select the **Migrate a phone number** option. For more information, see [Migrating your existing phone number from other CSP to Genesys](#).

6. Enter a channel name and description.

Important

Channel name is used as the phone display name in WhatsApp and it is visible to consumers interacting with the brand in WhatsApp Messenger. You must ensure that the name complies with WhatsApp policies. For more information on WhatsApp policies, see <https://developers.facebook.com/docs/whatsapp/guides/vname> .

Creating a WhatsApp Channel

The screenshot shows the 'New Channel' form. At the top left is a back arrow and the text 'New Channel'. The form contains the following fields:

- Channel Type ***: A dropdown menu with 'WhatsApp : Service' selected.
- Platform ***: A dropdown menu with 'PureEngage Premise' selected.
- Business Phone Number ***: A field with a country code dropdown (showing '+1') and a text input area.
- Channel Name ***: A text input field containing 'WhatsApp Doc'.
- Description**: A text area containing 'Doc channel for WhatsApp'.

At the bottom of the form is a blue button labeled 'Create'.

7. Click **Create**. The channel is now in the CREATED stage.

The screenshot shows the 'Update "WhatsApp Doc" Channel' form. At the top left is a back arrow and the text 'Update "WhatsApp Doc" Channel'. The form contains the following fields:

- Channel Type ***: A dropdown menu with 'WhatsApp' selected.
- Channel Name ***: A text input field containing 'WhatsApp Doc'.
- Production mode**: A toggle switch that is currently turned off.
- Channel status**: A toggle switch labeled 'Active' that is currently turned on.
- Channel ID**: A text input field containing '5c9b1e725aa1e90021e257b2'.
- Description**: A text area containing 'Doc channel for WhatsApp'.
- Platform**: A dropdown menu with 'PureEngage Premise' selected.
- Business Phone Number ***: A field with a country code dropdown (showing '+1') and a text input area.
- Current Stage**: A dropdown menu with 'CREATED' selected. This field is highlighted with a red rectangular border.

At the bottom of the form are two blue buttons: 'Update' and 'Initiate'.

The channel goes through the following stages in the activation process:

1. **CREATED** - The first stage after channel creation.
2. **INITIATED** - The channel is under review by Genesys.
3. **VERIFIED** - The channel information was reviewed and is correct.
4. **REGISTERED or REJECTED** - The channel can be registered or rejected by Genesys team based on the provided channel data.

5. **ACTIVATED** - The channel is activated and is enabled for WhatsApp Business.

Important

The **Production mode** toggle becomes visible only when the channel reaches the **ACTIVATED** stage .

Registering a WhatsApp channel

You must request Genesys to register your channel before proceeding with activation. After you initiate this request, the Genesys team starts verifying, provisioning, and configuring all the required infrastructure for your business contact number to function and service your consumers.

1. Log on to your Hub account via <https://socialanalytics.genesyscloud.com> .
2. Access **My Channels** and click on your channel name. The **Update Channel** page is displayed.
3. Enter email addresses of the contacts who must be notified on events related to the channel in the **Notify emails** field.
4. Click **WABA Details**. A form to enter your WhatsApp Business Account details is displayed.

Company Contact Details

* Kindly ensure the given details are accurate. Once the channel is initiated, these fields can't be changed.

Legal Business Name * Apex Solutions Company

Address (including Suite#) * 4056 Bell Street
New York
10014

GARN Code * 123456789

Company's Facebook business ID https://www.facebook.com/Ultra-Allied-Bank-1712176139013041/

Company Representative

First Name * Thomas K

Last Name * Edwards

Email Address * 0thnpu01is8r@olaimab.com

Phone Number * +1 9175906385

We purchased Genesys Messaging for WhatsApp from a partner ☒

Partner Contact Details

Legal Business Name * New Apex Solutions

Address (including Suite#) * 2377 Heliport Loop
Campbellsburg
Indiana

GARN Code * 987654321

Cancel Update Update and Close

5. Fill in your WhatsApp Business Account details along with your company representative's contact information and click **Update WABA**.

Tip

- If your Hub account has another WhatsApp channel with WABA details already filled in, select the channel from which you want to import the details in the **Populate Details from another channel** drop-down list.
- If you have purchased Genesys WhatsApp Messaging Solution from a partner, select **We purchased Genesys Messaging for WhatsApp from a partner** and enter the partner contact details in the **Partner Contact Details** section.

6. Click **Initiate** to request Genesys for a review. A confirmation message is displayed indicating that the request to review and register the channel has been received by Genesys. The channel is now in INITIATED stage.

Current Stage

INITIATED

You may be contacted by your Genesys representative to verify your WhatsApp channel, so make sure that all email addresses for the users registered in your account are valid. Once the initial validity has been checked, Genesys will set the channel state to VERIFIED. After Genesys completes the full review, you will receive an email indicating whether your request was approved. Your channel will now have one of the following states and your next step can be:

- REGISTERED - Activate the channel using the **Activate** button.
- REJECTED - Update the channel data such as phone number and channel name, and initiate the review again using the **Initiate** button.

Important

- You cannot edit the business phone number and channel name when your channel is in INITIATED stage. If you want to update these details, contact your Genesys representative.
- If your channel is rejected, contact your Genesys Representative to understand the reason for rejection.
- When your WhatsApp channel reaches the REGISTERED stage, the channel remains as REGISTERED for a maximum of two weeks until activated or rejected. After this period, you must initiate the channel registering process again.

Activating a WhatsApp channel

You can proceed with activation as soon as you have received an email from Genesys confirming that your channel is registered.

1. Log on to your Hub account via <https://socialanalytics.genesyscloud.com>.
2. Access **My Channels** and click on your channel name. The **Update Channel** page is displayed.
3. Ensure that the current stage is shown as REGISTERED and click **Activate**. A window is displayed for a PIN activation process.

Tip

If you have selected the **Migrate a phone number** option during channel creation, the **Activate** button is not displayed. Additionally, the channel is automatically activated after the migration process is completed.

← Update "WhatsApp Doc" Channel

Channel Type * WhatsApp

Channel Name * WhatsApp Doc

Production mode ☐

Channel status ☒ Active

Channel ID 5c9b1e725aa1e90021e257b2

Description Doc channel for WhatsApp

Platform PureEngage Premise

Business Phone Number * +1 2025550135

Current Stage REGISTERED

Update Activate

4. Click **Request PIN**.

×

Activate Channel

In order to verify your identity we will send you a registration code. Select "Have PIN" if you already have one or "Request PIN" otherwise.

Have PIN Request PIN

5. Select a mode of communication to receive the PIN and click **Next**.

×

How would you like to receive your PIN?

☒ SMS

☐ Voice Call

Next

6. After receiving the PIN, enter the PIN and click **Activate**. Your channel is activated.

Migrating your existing phone number from other CSP to Genesys

You can migrate a phone number from other content service provider to Genesys.

1. Create a WhatsApp channel. Enable the **Migrate a phone number** option and enter the existing phone number while creating the channel. See [Creating a WhatsApp channel](#).

New Channel

Channel Type * WhatsApp : Service

Platform * PureEngage Premise

Migrate a phone number ☒

Business Phone Number *

Channel Name *

Description Short des

Create

The phone number you want to migrate

- Must be currently registered with the source WABA.
- If two-factor authentication was ever enabled for this number, it needs to be disabled. This means the source WABA owner needs to disable the two-factor 6-digit pin that was previously set.

The phone number's owner is responsible for reaching out to the source WABA's owner.

2. Register the WhatsApp channel. While registering, you must enter your Facebook Business ID in the WhatsApp Business Account form. See [Registering a WhatsApp channel](#).

Tip

To find your Facebook Business ID, see [Find your business ID in Business Manager](#).

3. After your channel is approved and registered by Genesys, navigate to the **Update Channel** page, and click **Migrate Phone Number**. The **Migrate phone number** pop-up window is displayed.

[←](#) Update "Channel Name" Channel


Channel Type *

WhatsApp

Channel Name *

Channel Name

Channel ID



617ab 


Description

Platform

PureEngage Premise

Business Phone Number *

 +1 





Migrate Phone Number

RPC cache timeout

90

Notifications emails





Current Stage

REGISTERED

Update

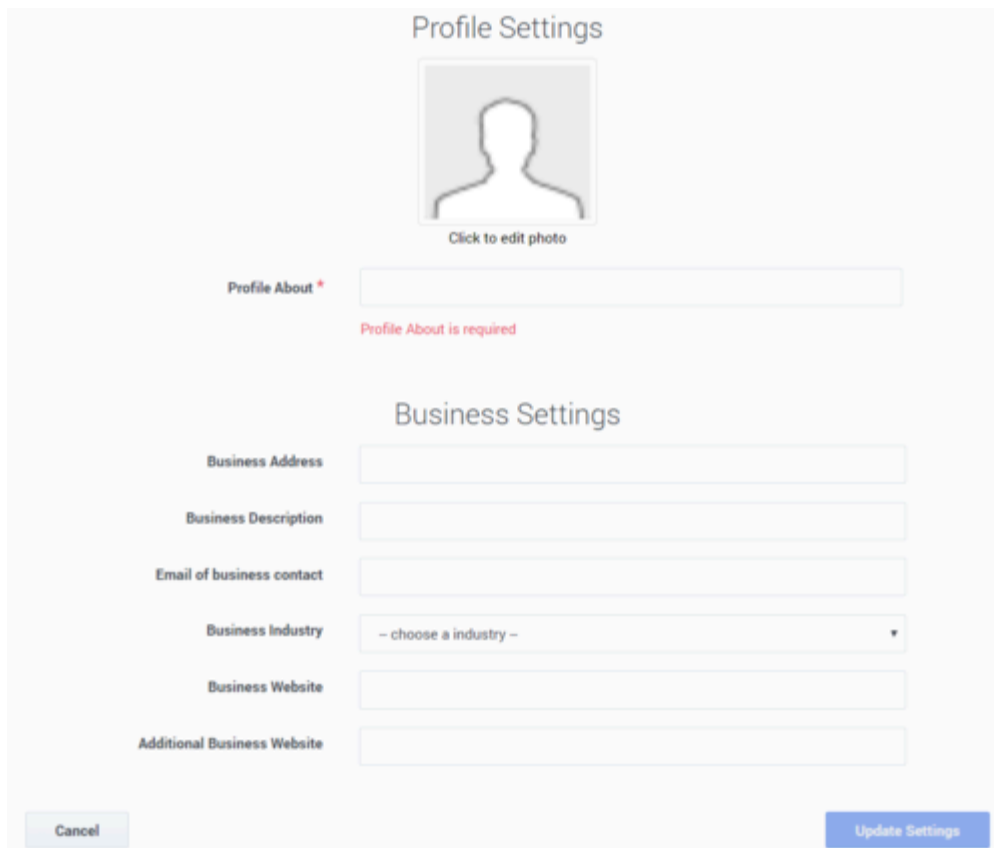
WABA Details

4. Click **Initiate migration** and follow the activation process. See [Activating a WhatsApp channel](#)
5. After entering your PIN and clicking **Submit**, your phone number is migrated and the channel is activated.

Adding a business profile

After your channel activation, you can add a business profile to the channel.

1. Click **Business Settings** on the **Update Channel** page. The **Profile Settings** screen displays.



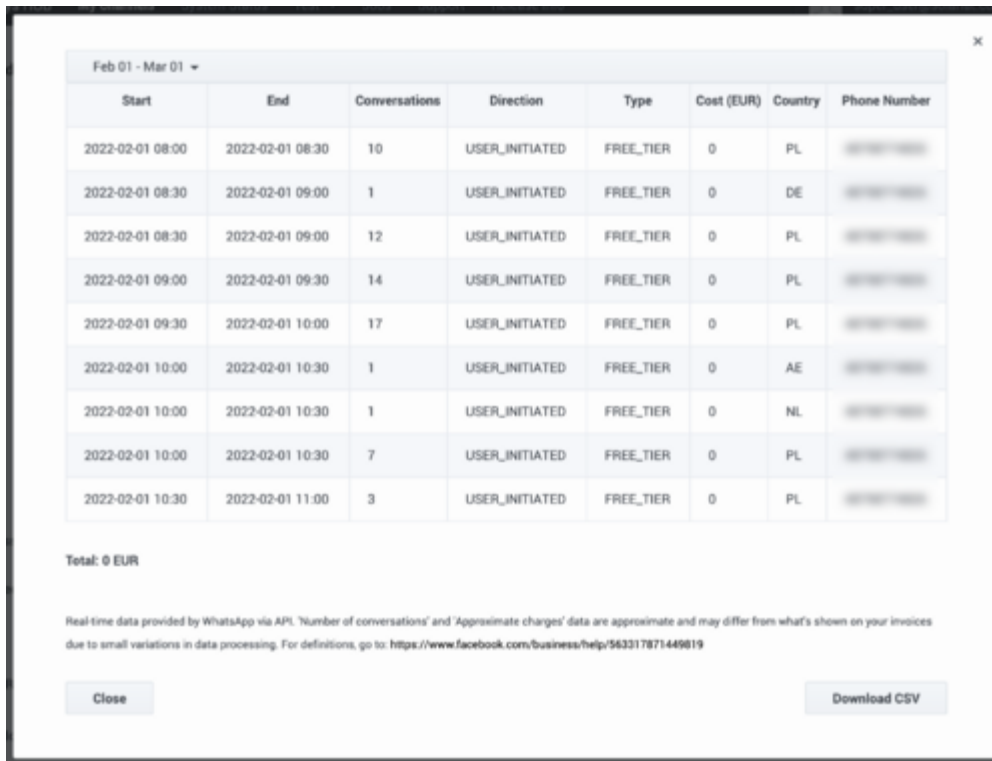
The screenshot shows the 'Profile Settings' interface for a WhatsApp Business account. At the top, there is a placeholder for a profile picture with the text 'Click to edit photo' below it. Below this is the 'Profile About' field, which is marked with a red asterisk and has a red error message 'Profile About is required' underneath it. The 'Business Settings' section follows, containing several input fields: 'Business Address', 'Business Description', 'Email of business contact', 'Business Industry' (a dropdown menu currently showing '- choose a industry -'), 'Business Website', and 'Additional Business Website'. At the bottom left is a 'Cancel' button, and at the bottom right is an 'Update Settings' button.

2. You can upload or edit your business profile picture using the **Click to edit photo** option.
3. Enter a profile description in the **Profile About** field. This field is mandatory.
4. Provide information about your business such as address, email, industry, and website. For more information on the WhatsApp business verticals that are displayed in the **Business Industry** drop-down field, see <https://developers.facebook.com/docs/whatsapp/api/settings/business-profile#verticals>.
5. Click **Update Settings** to save the business profile.

Viewing WABA Billing

WhatsApp billing analytics is available for customers with WhatsApp Business Accounts (WABA) managed by or shared with Genesys. Follow these steps to view the detailed conversation analytics for the configured WABA:

1. Access the WhatsApp channel page and click **WABA Billing**. A pop-up window is displayed.
2. Select a date range. The billing analytics pertaining to the selected period are displayed.



The screenshot displays a WhatsApp analytics window with a table of conversation data. The table has columns for Start, End, Conversations, Direction, Type, Cost (EUR), Country, and Phone Number. The data shows several conversations initiated by users, all at zero cost. At the bottom, there is a 'Total: 0 EUR' summary, a disclaimer about real-time data, and a 'Download CSV' button.

Feb 01 - Mar 01 ▾							
Start	End	Conversations	Direction	Type	Cost (EUR)	Country	Phone Number
2022-02-01 08:00	2022-02-01 08:30	10	USER_INITIATED	FREE_TIER	0	PL	0015111555
2022-02-01 08:30	2022-02-01 09:00	1	USER_INITIATED	FREE_TIER	0	DE	0015111555
2022-02-01 08:30	2022-02-01 09:00	12	USER_INITIATED	FREE_TIER	0	PL	0015111555
2022-02-01 09:00	2022-02-01 09:30	14	USER_INITIATED	FREE_TIER	0	PL	0015111555
2022-02-01 09:30	2022-02-01 10:00	17	USER_INITIATED	FREE_TIER	0	PL	0015111555
2022-02-01 10:00	2022-02-01 10:30	1	USER_INITIATED	FREE_TIER	0	AE	0015111555
2022-02-01 10:00	2022-02-01 10:30	1	USER_INITIATED	FREE_TIER	0	NL	0015111555
2022-02-01 10:00	2022-02-01 10:30	7	USER_INITIATED	FREE_TIER	0	PL	0015111555
2022-02-01 10:30	2022-02-01 11:00	3	USER_INITIATED	FREE_TIER	0	PL	0015111555

Total: 0 EUR

Real-time data provided by WhatsApp via API. 'Number of conversations' and 'Approximate charges' data are approximate and may differ from what's shown on your invoices due to small variations in data processing. For definitions, go to: <https://www.facebook.com/business/help/563317871449819>

Close Download CSV

3. Click **Download CSV** to export the analytics to a CSV file.