



WhatsApp Integration with ServiceOps

Using Facebook or Twilio



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1. Overview

What is WhatsApp Integration?

WhatsApp is a chat application to communicate on the go. Using WhatsApp for incident creation and management will become easier if you integrate the ServiceOps with WhatsApp. Once combined, you can generate or review requests from WhatsApp without signing in to the Support Portal or accessing the chat agent from the portal.

You can integrate WhatsApp with ServiceOps in two ways:

- **As a Virtual Agent**: A virtual agent is a bot that works based on the chat flows configured in ServiceOps. Using this, you can create and manage both incident and service requests. In this case, WhatsApp Business Account is used for integrating WhatsApp with ServiceOps.
- **As a Messaging App**: A messaging app is an intermediary between the ServiceOps and WhatsApp application. It provides the users with a pre-defined list of incidents request management actions and responds accordingly over the WhatsApp application. In this case, Twilio is used as a messaging app.

Such integrations provide programmable communication tools for sending and receiving messages, and performing other communication functions using its web service APIs.



2. WhatsApp for Business Integration

Using Facebook

Prerequisites

- ServiceOps hosted on a public URL
- SSL Certificate enabled
- The Base URL in ServiceOps should be the same as the portal URL
- Chat support should be enabled in the ServiceOps Portal
- Requester created in the ServiceOps Portal
- WhatsApp account created with the same requester contact number as configured in the above point.
- Valid Facebook account
- Valid WhatsApp business number

Applicable Version

This functionality is applicable from version 7.9 and above.

Create App

To create a WhatsApp Virtual Agent using Facebook, follow the below steps:

Step 1: Install WhatsApp from the Google Play Store and create an **account**.

Step 2: Login to [Meta for Developers](#) using the existing Facebook account.

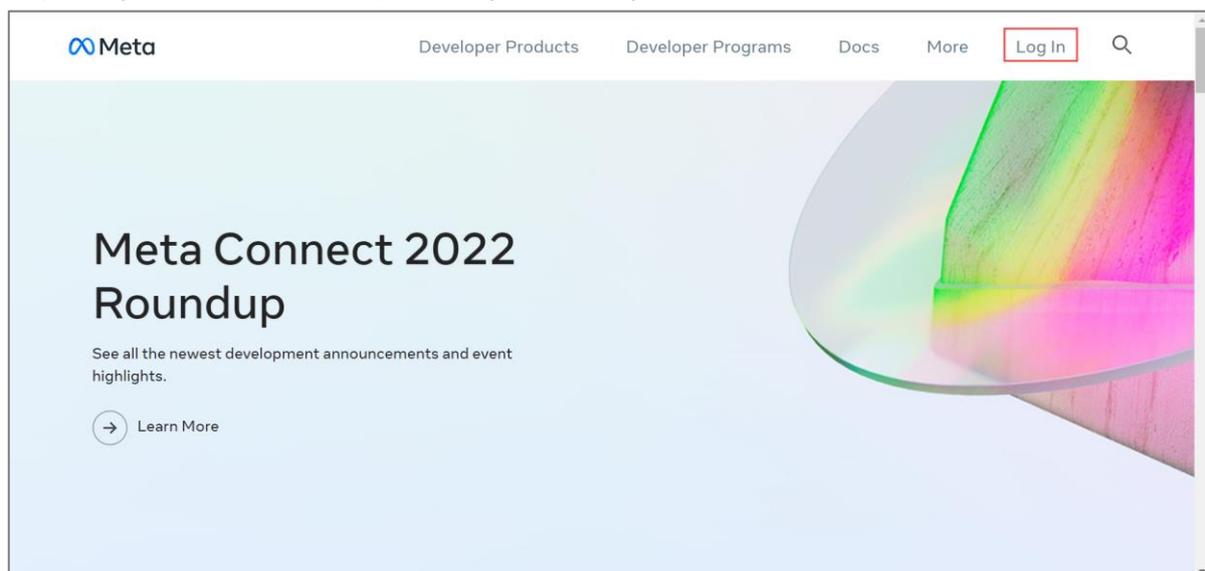


Fig 1: Login Meta for Developers

Step 3: Click My Apps > Create App.

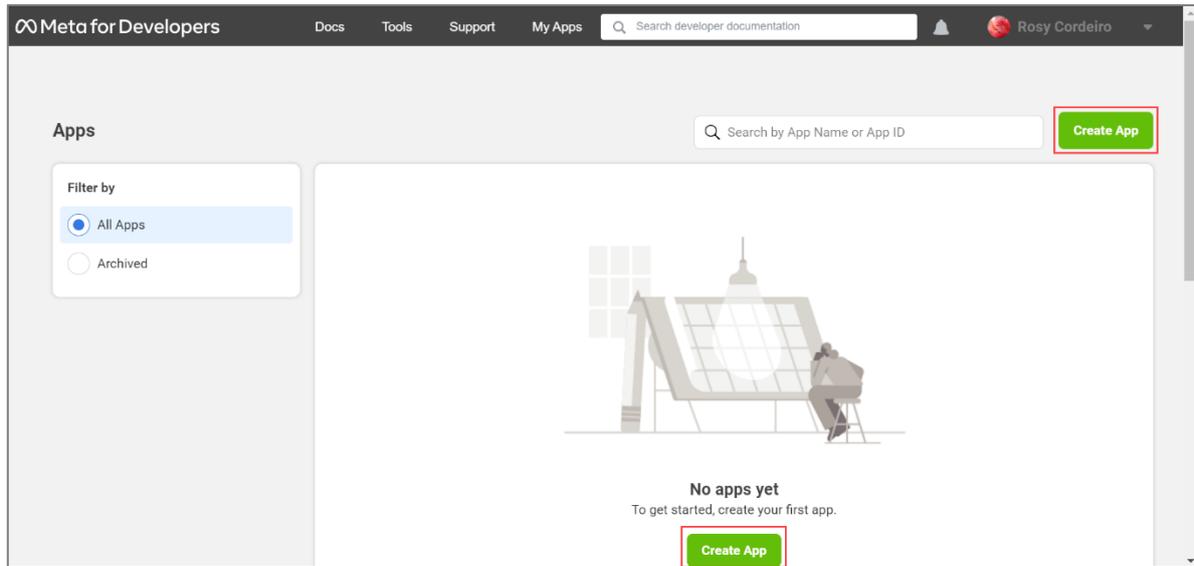


Fig 2: My Apps > Create App

Step 4: Select an app type as "Business" and click Next.

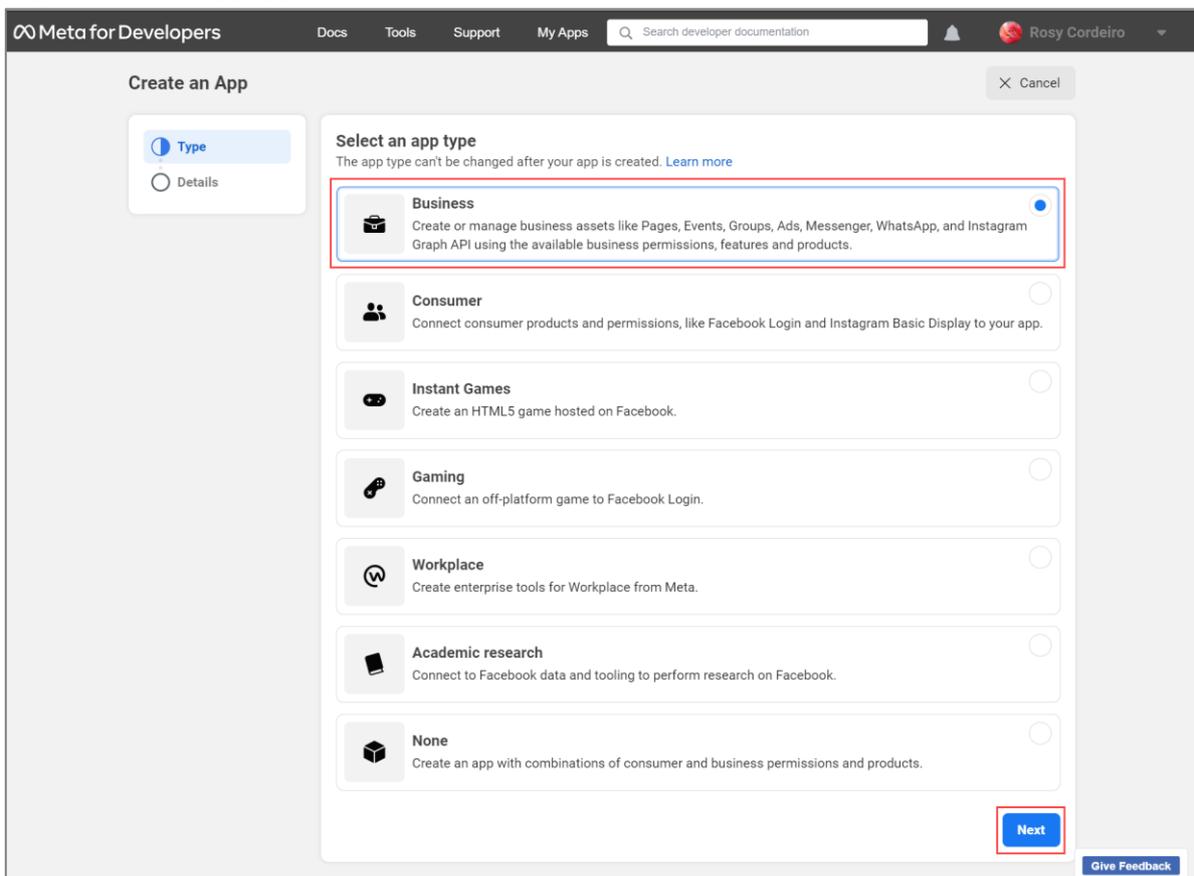


Fig 3: Select Business App Type



Step 5: Enter the basic details like the **app name**, **App contact email**, and click **Create app**.

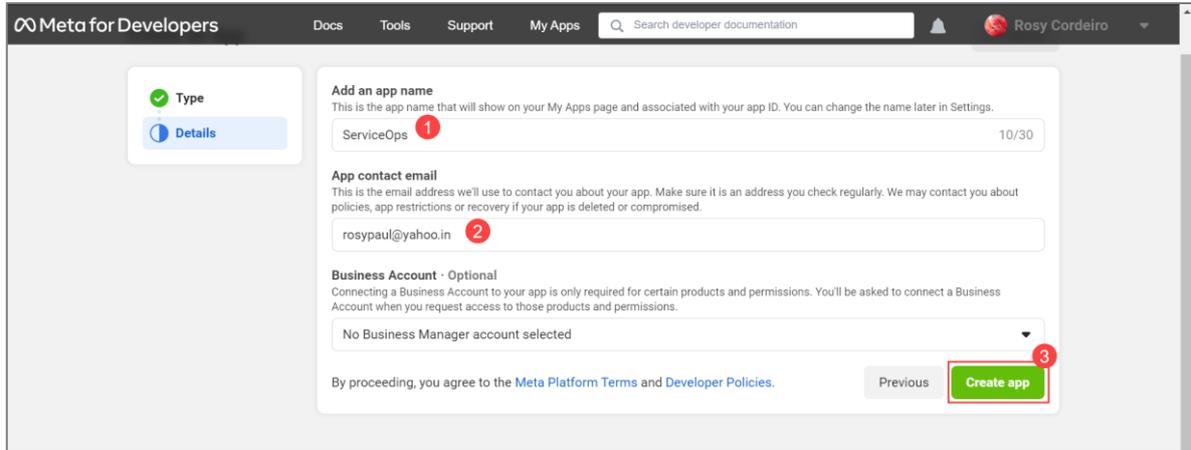


Fig 4: Enter the Basic Details

Step 6: Re-enter the password of your account and click **Submit**.

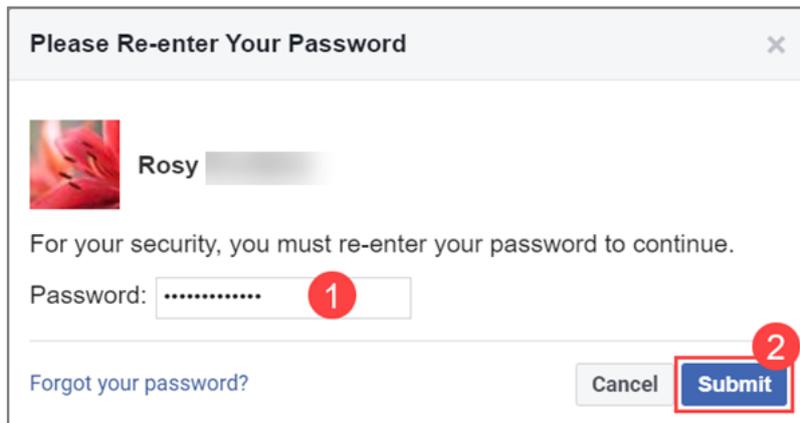


Fig 5: Re-enter Password

The app gets created, and its details page appears.

Add Phone number

Step 7: On the left-side menu, click the **Add Product** link, search for **WhatsApp** on the right-hand side, and click **Setup**.

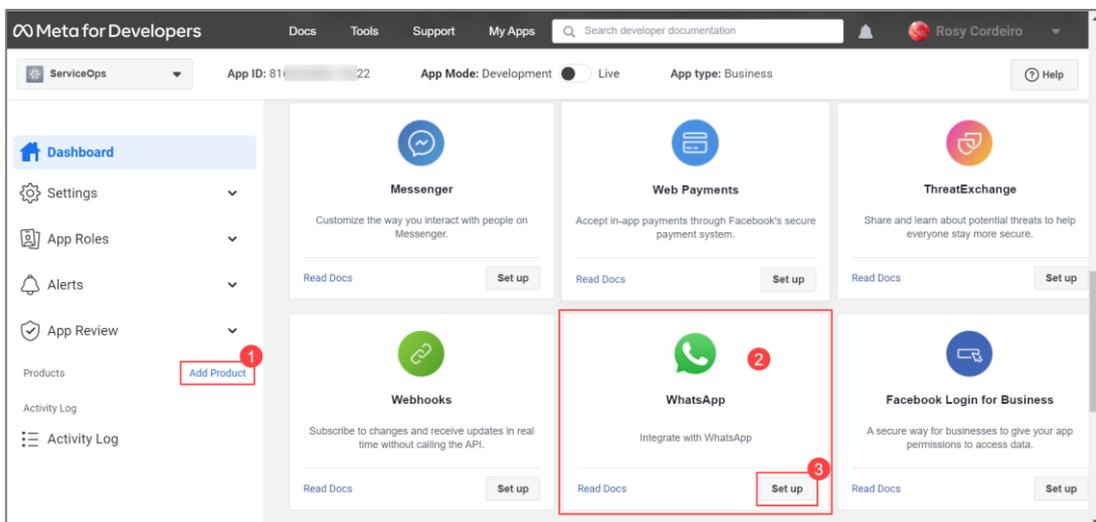


Fig 6: Setup WhatsApp



The following **Quickstart** page appears. Create or select a Meta Business Account from the dropdown and click **Continue**.

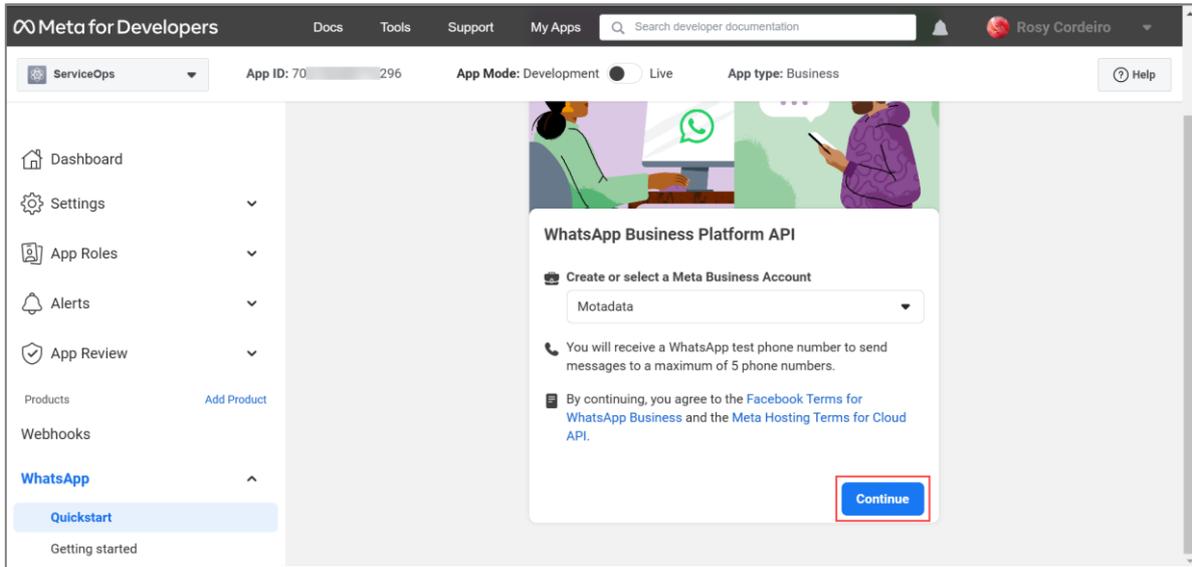


Fig 7: Select a Meta Business Account

Step 8: Next, on the left panel, navigate to **WhatsApp > Getting Started** page, scroll down to step 5, and add a phone number using the **Add phone number** button. For more details, refer to the [Phone Numbers](#) page.

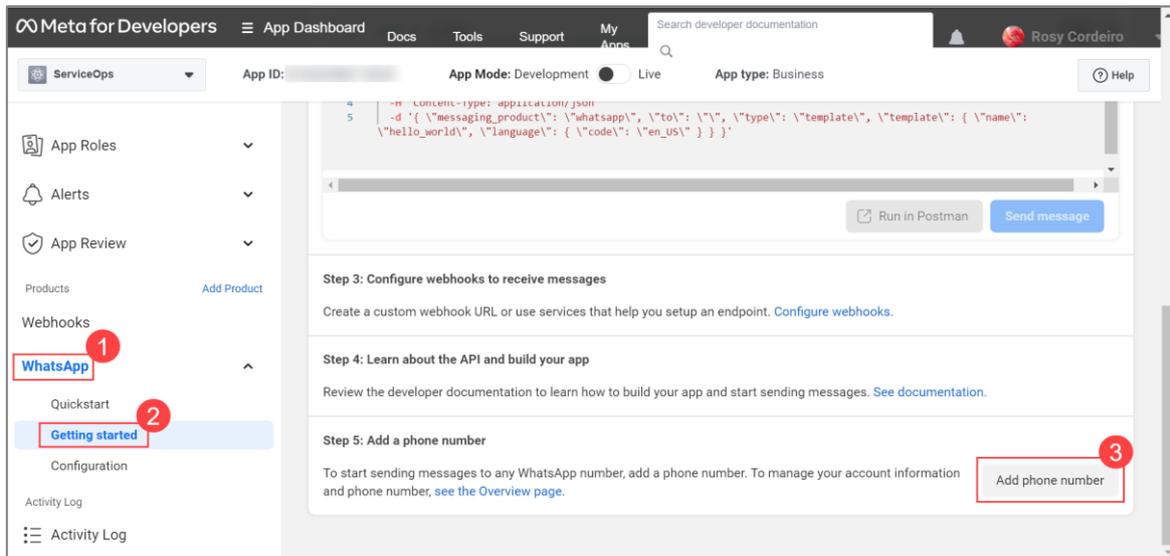


Fig 8: Add Phone number

The following popup appears.



Step 9: Fill in the below details.

Fill in your business information

Complete your business information to add your phone number.

Your business information
This information is required for your Meta Business Account. It will not be shown on your WhatsApp Business profile unless you add it on the next step or later in **Settings**.

Business name
Motadata 8/100

Business Email
You'll receive an email to verify it.
rosy@motadata.com

Business website or profile page
If you don't have a business website, you can use a URL from any of your social media profile pages.
https://www.motadata.com/

Country
India

+ Add Address (optional)

Back **Next**

Fig 9: Fill in the details

- **Business Name:** Enter the name of your business.
- **Business Email:** Enter the email address on which email will be sent for verification.
- **Business website or profile page:** Enter the URL of your website.
- **Country:** Select the country.

Once done, click **Next**.

Step 10: Create a WhatsApp business profile by entering the below details and click **Next**.

Create a WhatsApp Business profile

Your profile information will be visible to people on WhatsApp.

WhatsApp Business Profile Display Name
Motadata

Timezone ⓘ
(GMT+05:30) Asia/Kolkata

Category
Professional Services

Business Description · Optional
Tell people about your business 0/512

Back **Next**

Fig 10: Create a WhatsApp Business profile



Step 11: Add a phone number for WhatsApp that is not registered and select the method for verification. You can verify your number either via a **text message** or **phone call**. Once done, click **Next**, and the code will be sent on this number for verification.

Note: If the number is registered to an existing WhatsApp account, stay on this page, delete the account associated with this number, and re-verify it after 3 minutes.

Fig 11: Add Phone number

Step 12: Verify the phone number using the code sent and click **Next**. The phone number gets added.

Step 13: Next, move to step 1, and select the phone number which will be used for sending messages. The dropdown displays the number added in the above steps. Once the number is selected, its phone number ID appears as shown below.

Fig 12: Select Phone number



Step 14: Copy the **Phone number ID** and paste it to ServiceOps as shown below.

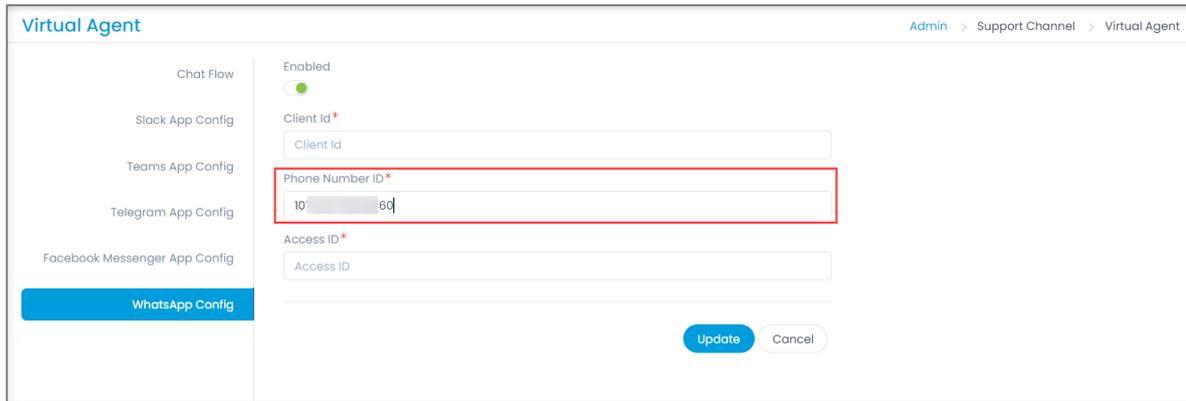


Fig 13: Paste the Copied Phone number ID

Generate Token

Step 15: To generate token, navigate to **WhatsApp > Configuration > Permanent Token** section, and refer to the link, [Learn how to create a permanent token](#). Here, you can create a token in two ways:

- **System User access token** created in the WhatsApp Business Accounts tab of the Business Manager
- A **User Access token** via Facebook Login.

Once the token is generated, copy and paste it into the **Client ID** field of ServiceOps.

Configure WhatsApp in ServiceOps

Step 16: In the ServiceOps Portal, navigate to the **Admin > Support Channel > Virtual Agent > WhatsApp Config** tab.

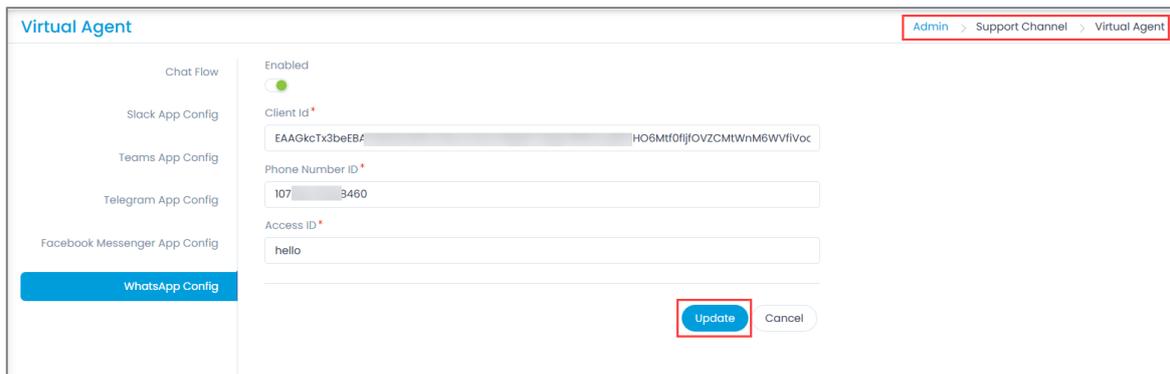


Fig 14: WhatsApp Config page

1. **Enable** the functionality.
2. **Paste the Client ID** (permanent token) copied from the Meta for Developers page in **Step 15**.
3. **Paste the Phone number ID** copied from **Step 13**.
4. Enter the **Access ID** using which a connection will be established between the Facebook and ServiceOps. The ID can be any text or combination of text and numbers. For example: Hello. Use this same Access ID in the **Verify token** field while editing the **Webhook Callback URL**.
5. Once done, click **Update**.



Configure Webhook

Step 17: In the Meta for Developers page, navigate to **WhatsApp > Configuration** menu, and click **Edit**.

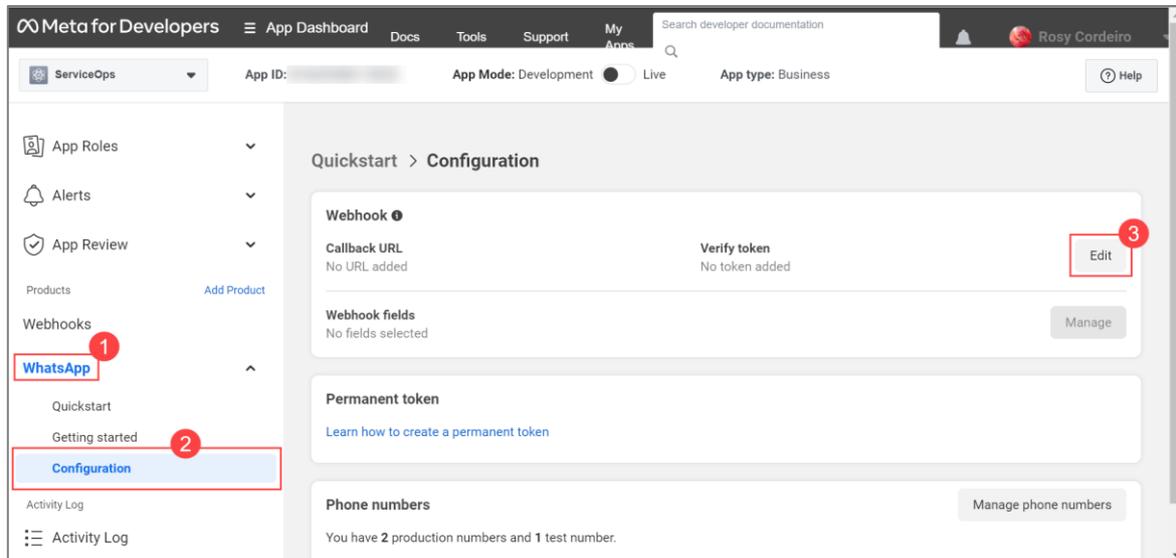


Fig 15: Configuration page

The **Edit webhook's callback URL** popup appears. Enter the following:

- **Callback URL:** Enter the URL of the ServiceOps Portal. Use the below URL format:
{server URL}/api/public/whatsapp
- **Verify token.** Use the token entered in the **Access ID** field of ServiceOps (Step 16).

Once done, click **Verify and Save**.

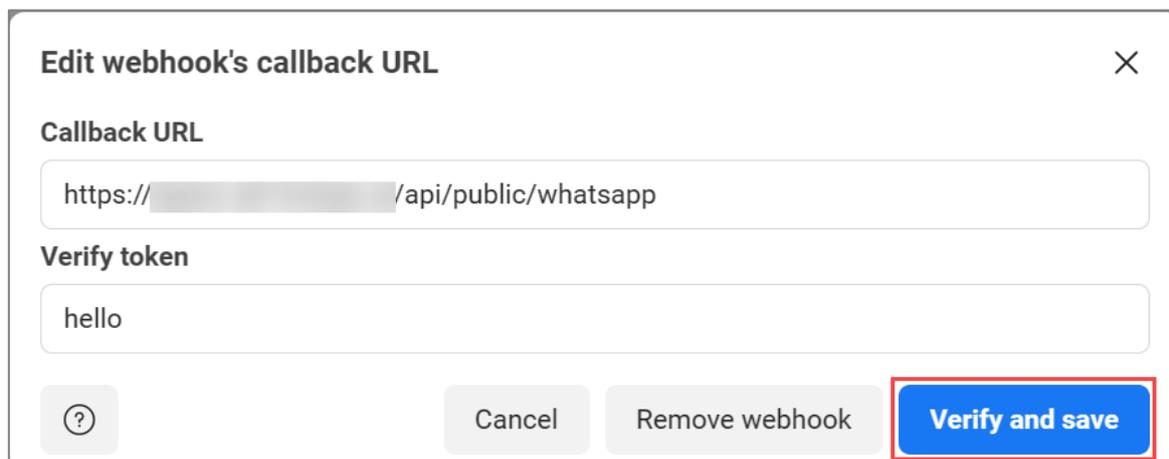


Fig 16: Edit Callback URL

Step 18: Next, click the **Manage** button to add Webhook fields.

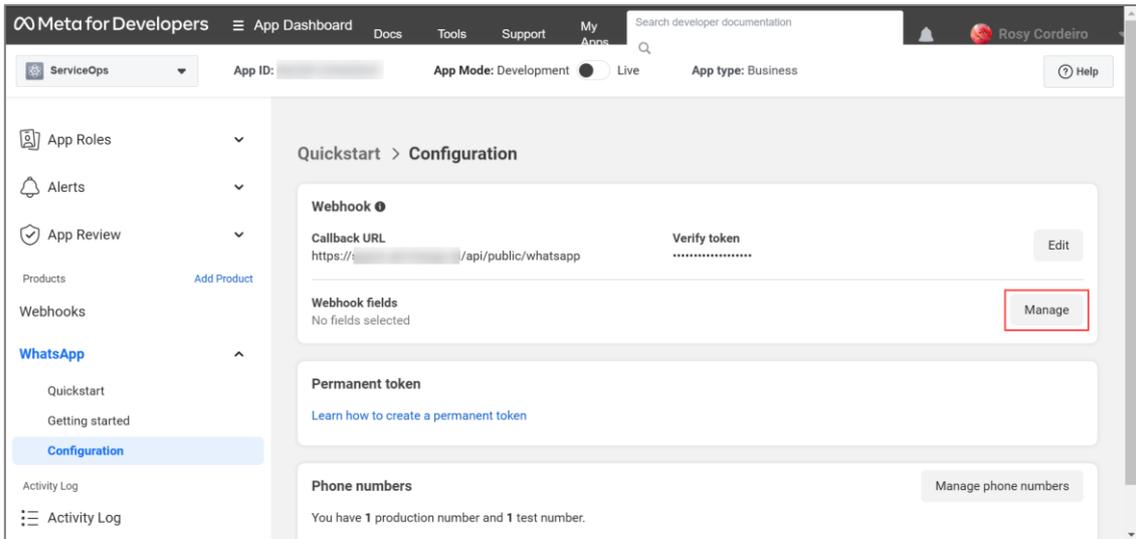


Fig 17: Manage Webhook fields

The following popup appears. Select the **messages** field, **Subscribe**, and click **Done**.

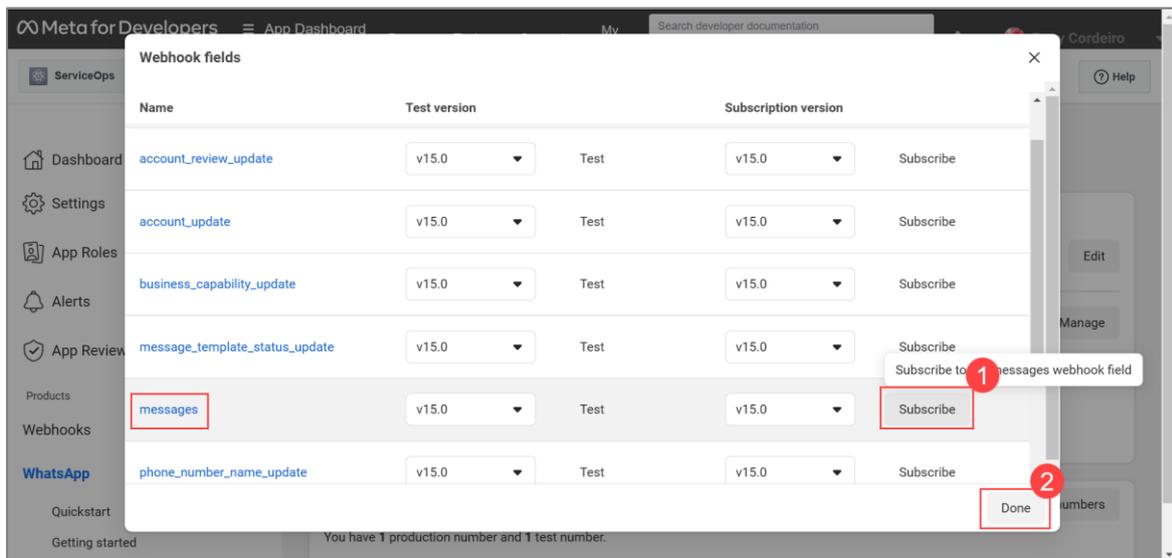


Fig 18: Subscribe messages field



Step 19: In the WhatsApp, search for the phone number added, type Hi, and a welcome message appears. You can then start your conversation with the bot as shown below.

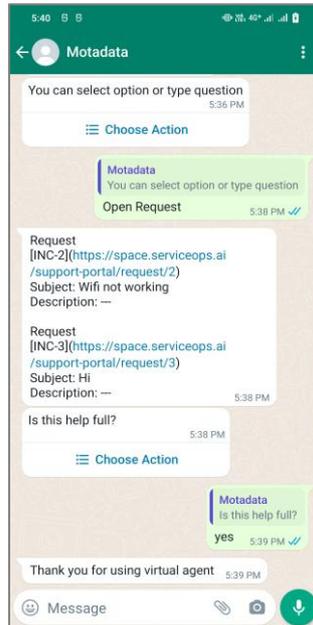


Fig 19: WhatsApp Conversation

3. Twilio WhatsApp Integration

Prerequisites

- ServiceOps hosted on a public URL
- SSL Certificate enabled
- Chat support should be enabled in the ServiceOps Portal
- The Base URL in ServiceOps should be the same as the portal URL
- Valid WhatsApp account

Applicable Version

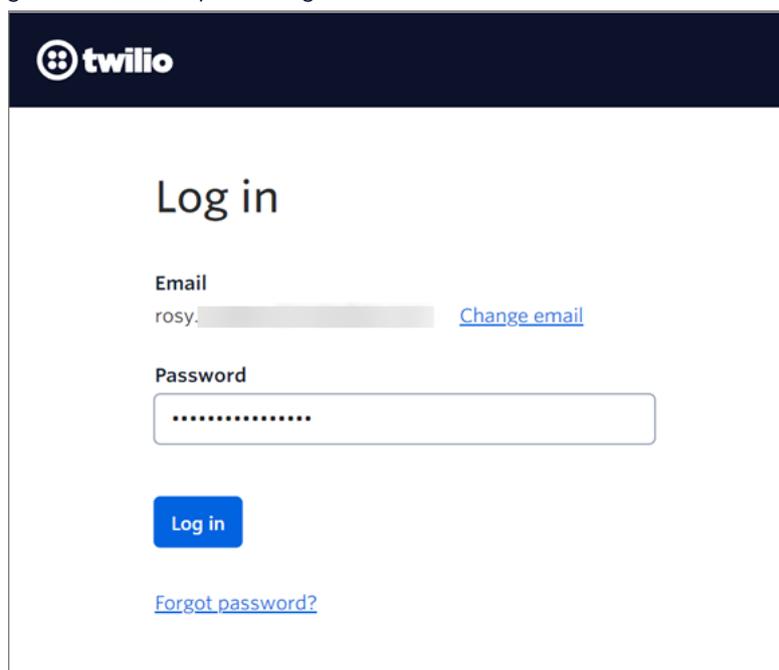
This functionality is applicable from version 7.8 and above.

Create App

To create a WhatsApp Messaging App using Twilio, follow the below steps:

Step 1: Install WhatsApp from the Google Play Store and create an **account**.

Step 2: Login or register to **Twilio** by entering the Email Address and Password.



The screenshot shows the Twilio login page. At the top left is the Twilio logo. The main heading is "Log in". Below it, there are two input fields: "Email" with the text "rosy." and a "Change email" link, and "Password" with a masked input field. A blue "Log in" button is positioned below the password field. At the bottom, there is a "Forgot password?" link.

Fig 20: Login Page

Step 3: Click the **account link** at the top-left corner of the screen. For first-time users, click the link **My first Twilio account** below.

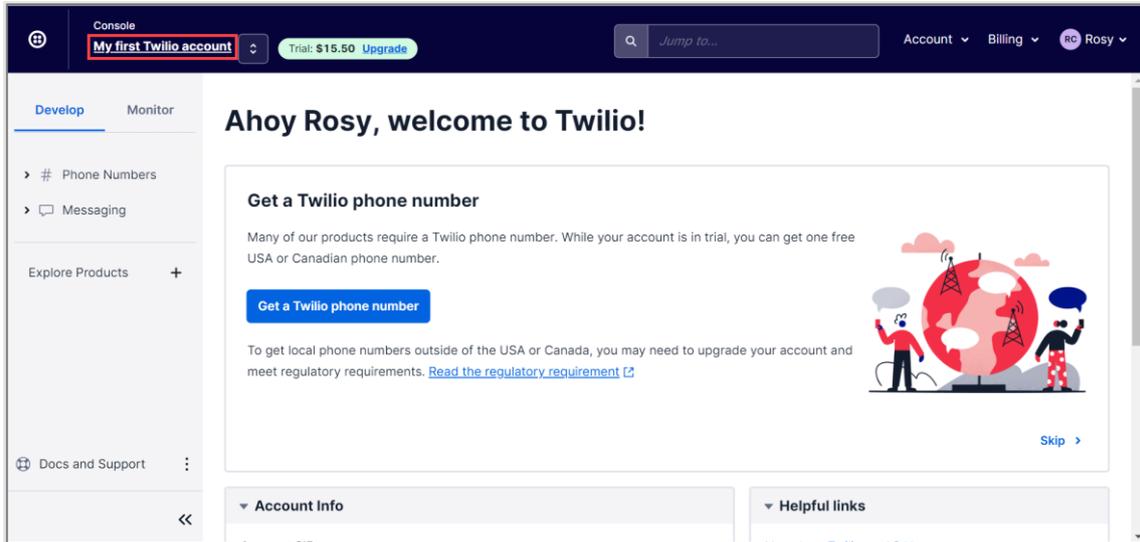


Fig 21: Click the link

Step 4: In the **Account Info** section, copy the **Account SID** (Client ID) and **Auth Token** (Password).

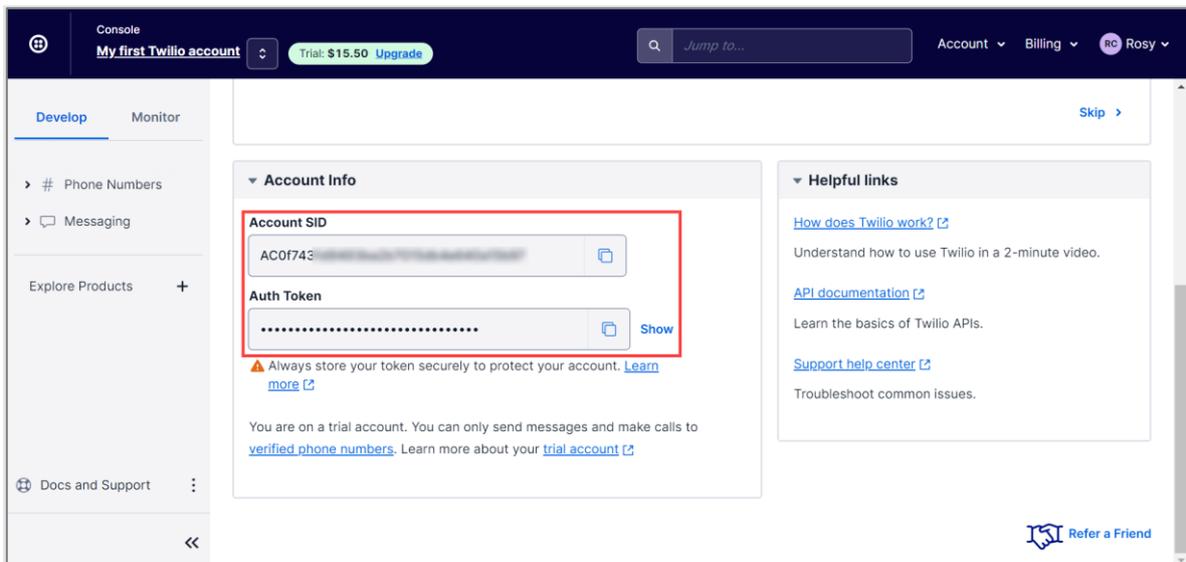


Fig 22: Account Info



Step 5: In ServiceOps,

1. Navigate to **Admin > Support Channels > Messaging App > WhatsApp** page.
2. **Enable the WhatsApp functionality**
3. **Paste the copied Client ID and Password** from the above point.

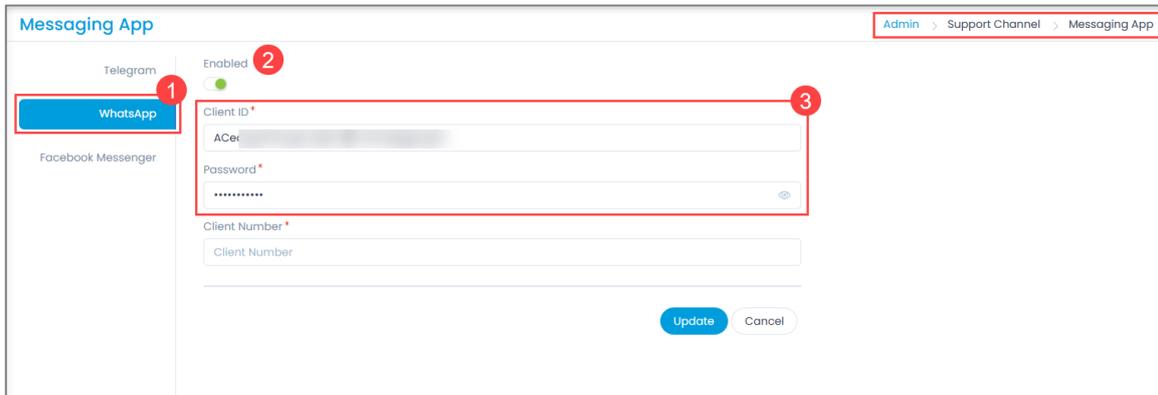


Fig 23: Paste the copied Client ID and Password

Step 6: In Twilio, navigate to **Messaging > Try It Out > Send a WhatsApp message** page. Then, activate your sandbox by **agreeing** and clicking **Confirm**, as shown below.

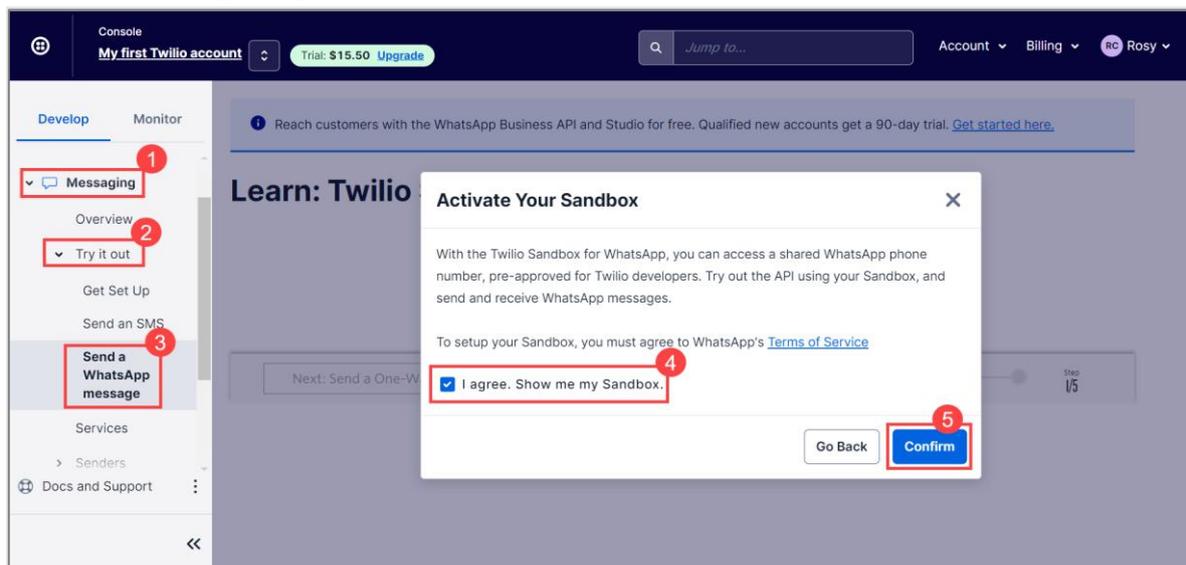


Fig 24: Activate your Sandbox

The following screen appears.

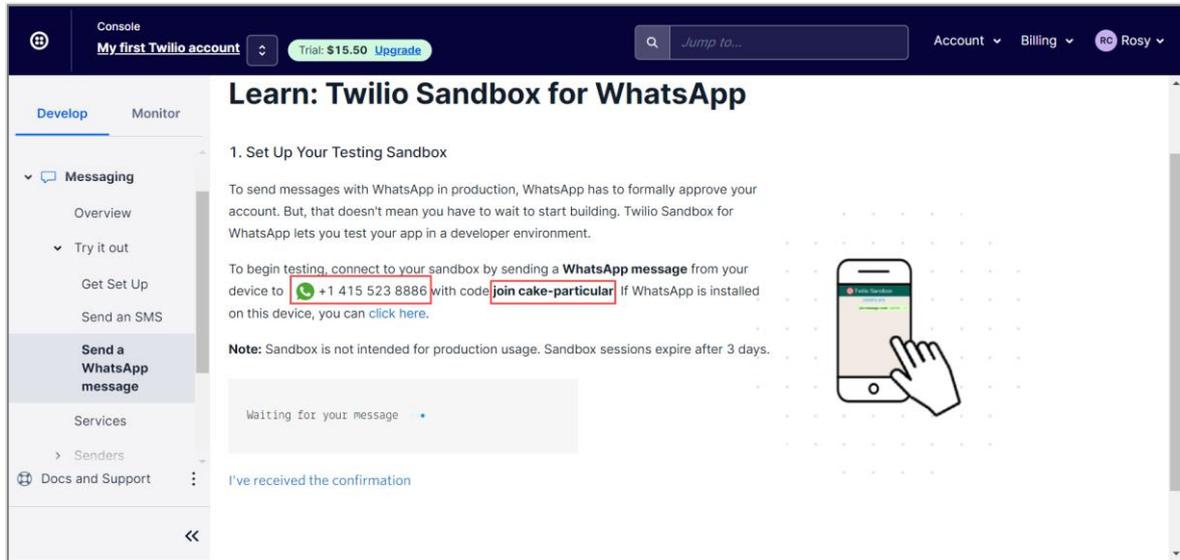


Fig 25: Client Number and Code

Step 7: Save the above-provided number and send the code via WhatsApp, as shown below.



Fig 26: Send the Code

Once the code is sent and received in Twilio, your phone number gets linked to the sandbox, and a confirmation message appears.



Step 8: Copy the Twilio phone number and paste it into the ServiceOps Client Number field.

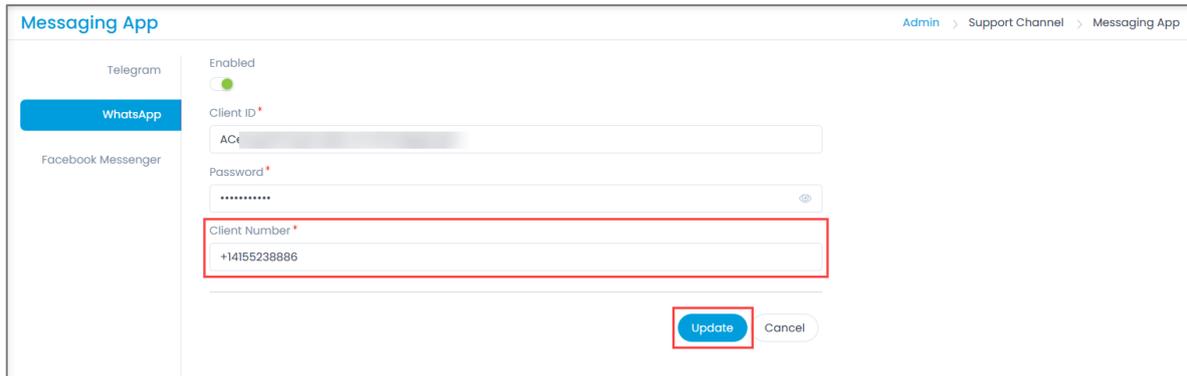


Fig 27: Copy Client Number

Once done, click **Update**, and a confirmation message appears.

Step 9: In Twilio, navigate to **Messaging > Settings > WhatsApp Sandbox Settings** page. Change the base URL link in the “When a Message Comes In” field (4).

Syntax of URL: `https://{server URL}/api/public/whatsapp/readMessage`

Sample URL: `https://dummy.com/api/public/whatsapp/readMessage`

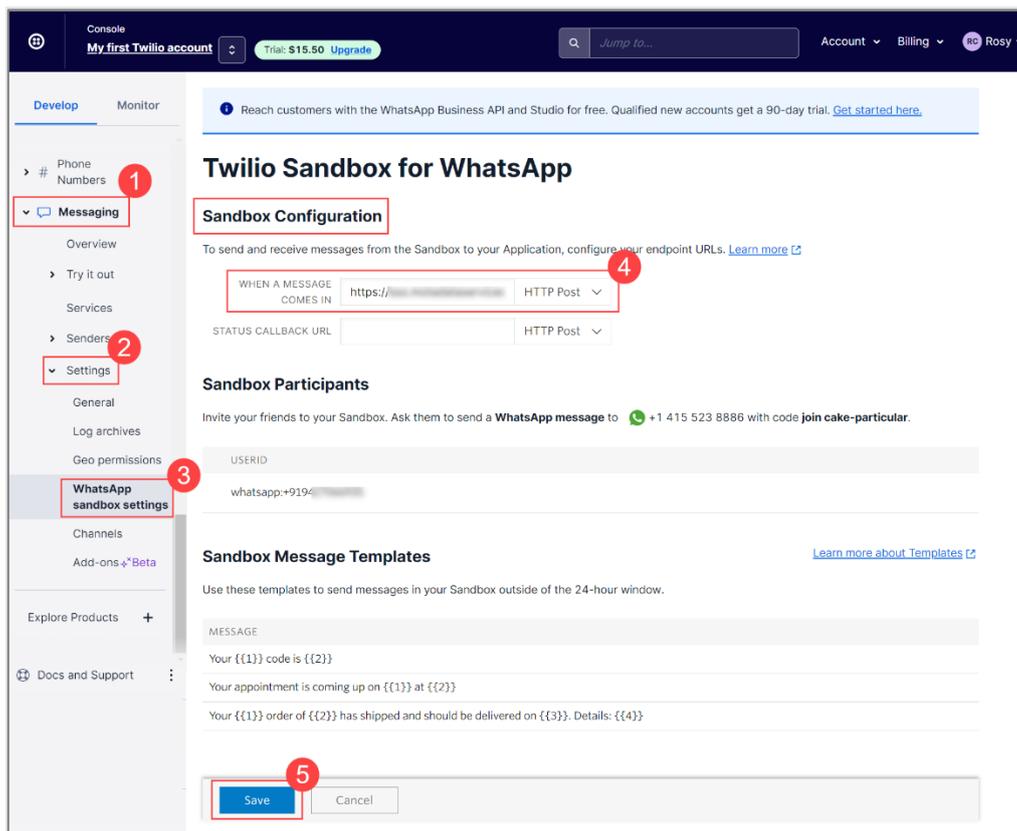


Fig 28: Change the Base URL

Once done, click **Save** (5), and the app gets created.



Step 10: In the WhatsApp Twilio chat, type Hi, and a welcome message appears, as shown below.

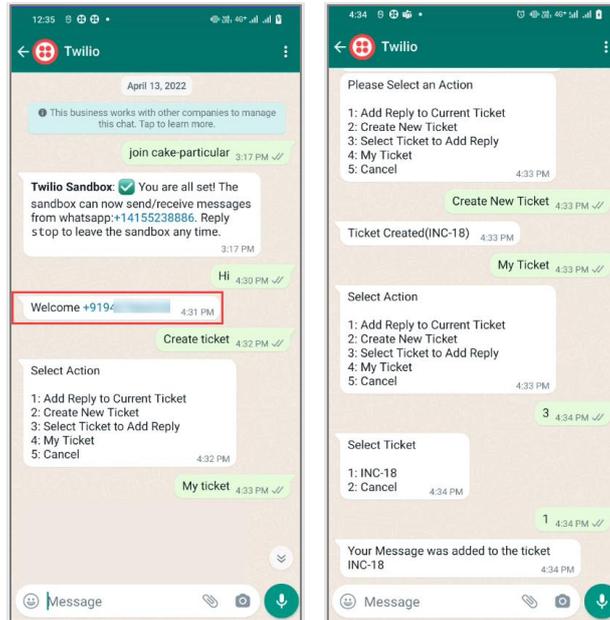


Fig 29: WhatsApp Conversation

You can now reply with the necessary action and get the desired response.



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