



WhatsApp

Technical Document | Feb 11, 2020
Partners Only

1 Foreword

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3 Feature Context

Due to a decision made by Facebook in July 2020, no new Whatsapp integrations will be allowed until the end of August. Facebook is revising the general terms to apply to all new onboardings from September 2020 on. We are hoping whatsapp integrations will resume from September on.

3.1 What is WhatsApp about?

For medium and large businesses, the **WhatsApp Business API** powers your communication with consumers all over the world, so you can connect with them on WhatsApp in a fast, simple, secure, and reliable way. It allows you as a marketer to start a direct conversation and send personalized messages.

The development of the WhatsApp connector is in the hands of the Services Team and is currently built to be compatible with **CM.com** only. CM.com is an official WhatsApp Business Solution Provider with global coverage.

What is currently possible with this connector?



In CAMPAIGN, 1:1 communication for personalized & transactional messages (e.g. order confirmation, delivery information). For this you can use **template messages** that have been created in CM.com, are approved by WhatsApp and require an opt-in for the consumer.

It is also possible to send **Session messages**, which are created on the fly, do not need approval from WhatsApp but can only be sent as a response to an incoming WhatsApp message from a consumer. No opt-in is required for session messages, but they can only be sent as a reply to an incoming message and this within 24hours.



For SMC, we are working on SMC implementation to include WhatsApp as a standard channel. It is **Not available yet** and not immediately on the planning either. => One of the reasons why this is not possible yet is that CM.com needs to support the API that allows us to build these templates in SMC and get them validated by CM.com by sending them through an API. Also, WhatsApp for SMC is not on the current prio list.

3.2 WhatsApp in Selligent

To use WhatsApp as a channel in Selligent, there are **2 plugins**, created by the Services team.

- CM.WhatsApp.TemplateMessage plugin allows to send **Template messages** after an active opt-in (more on this further in the doc) from the consumer.
- CM.WhatsApp.DirectMessage plugin allows to send **Session messages**, which are sent only as a reply on an incoming WhatsApp message and this within 24 hours (If the reply is not sent within 24 hours, it won't be sent anymore). To capture the incoming WhatsApp messages, we currently use the SMSInbound Middleware. CM.com sends the incoming WhatsApp message to a specific

endpoint and whenever a message comes in, a dedicated journey in Campaign is triggered where the message arrives in an Input component. (This dedicated journey is automatically created when Services installs the SMSInbound middleware on an environment). Once a message arrives in that journey, it can be acted upon.

So, WhatsApp is not a native solution in Selligent, but supported through plugins, created by the Services team.

There are 2 steps in the use of WhatsApp in Selligent.

1. Create the **interface** in Campaign, one for each supported plugin.
2. Create the **journey** using the WhatsApp interface to send out the messages.

3.2.1 Create the interface in Campaign

1. To configure the connector interface for the Template/Session message, go to Process/ Interfaces section and **create a new interface**.

2. Define a name for the interface and select the plugin CM.WhatsApp.TemplateMessage for Template messages and CM.WhatsApp.DirectMessage for Session messages.

3. Click the **Configure** button next to the plugin field to fill out the properties for this interface.

4. Enter the **phone number** used to send the messages and the **Product token**. These settings are the same for both plugins. The **product token** can be retrieved from your WhatsApp interface, after completing the creation of

the Business account. (See further in this document).

5. When done, save the interface. It will be available from the Journey chapter, when adding the interface component.

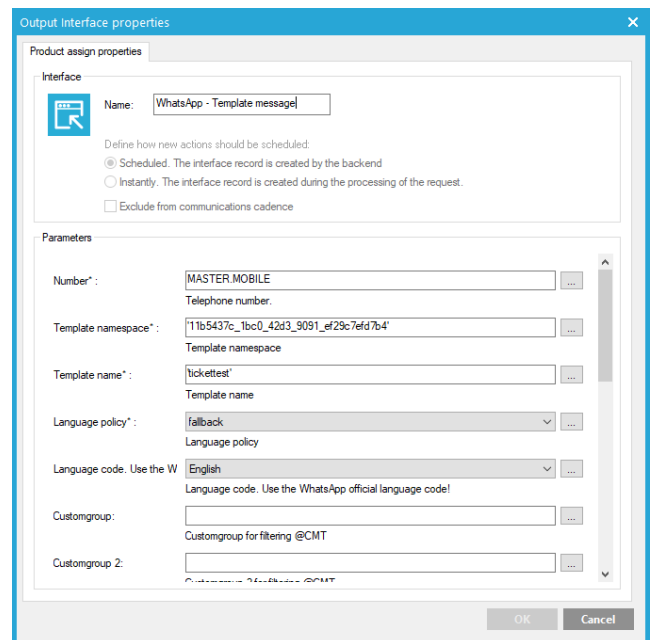
3.2.2 Use the WhatsApp channel in a journey in Campaign

When you want to send out WhatsApp messages, you need to create a journey and add the interface to the journey canvas. The properties of the interface are different depending on the type of message.

3.2.2.1 Template messages

Drop the WhatsApp interface component in the journey and set its properties.

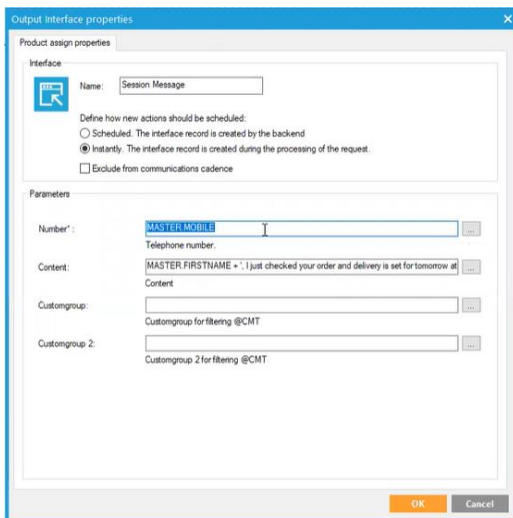
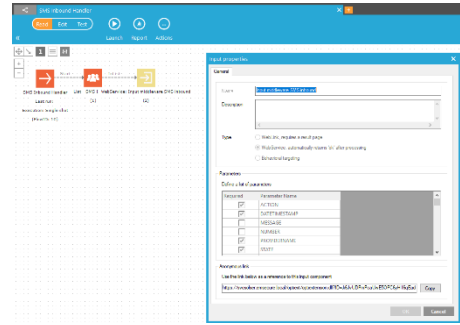
- **Number** — The phone number to whom to send the message. This is a personalization field from the master list
- **Template namespace** — This information comes from the Template details when the template is created in CM.com (See further in this document)
- **Template name** — The template name, as created in the CM.com templates section (See further in this document)
- **Language policy** — You can choose from **fallback** and **deterministic**. Fallback means we will try to match the message to the language of the WhatsApp recipient and if there is no match, the language indicated in the Language code field will be used to send the message. Deterministic means we will send the WhatsApp message in the language selected in the Language code field, regardless the language of the WhatsApp recipient.
- **Language code** — The fallback language or deterministic language to use for the WhatsApp message
- The 2 other fields **CustomGroup** and **CustomGroup 2** are CM.com related and do not required any additional information.
- **Amount of template fields** — The number of custom fields in the template that will be used and filled with data. If your template is created with 2 customization fields, then you need to set 2 here. (See below on how to create the templates in CM.com)
- **Parameter to replace 1 to 10** — Set here the personalization field or value that needs to replace the parameters in the template.



3.2.2.2 Session messages

Session messages can only be sent as a response to an incoming message from the consumer, and this within 24 hours. The incoming WhatsApp messages arrive in a dedicated journey where the marketer can prepare a response to the incoming message.

This dedicated journey is created automatically on the environment when the SMSInbound Middleware is installed by the services team. This middleware is used to capture the incoming WhatsApp messages that are sent by CM.com to this endpoint. Once the messages arrive in the Input Component in this journey, the marketer can complete this dedicated journey for example with a split to filter out the WhatsApp messages and then an interface component for the Session Message to be sent as a reply.



Set the following properties for the Session message:

- **Number** — The number to whom the message must be sent
- **Content** — The content of the message. This content can contain personalization fields from the master list and 1:1 related lists.
- The 2 other fields **CustomGroup** and **CustomGroup 2** are CM.com related and do not required any additional information.

3.3 Use Cases

Below are only a few of the many situations in which WhatsApp communications with the customers can be used:

- Customer care and shipping notifications. (For example, the customer orders a product on the website and indicates he wants to be alerted through WhatsApp when the package has been shipped.)
- Reminders (appointment bookings, payment due dates). (For example, a patient makes an appointment at the doctor and will be reminded by a WhatsApp message a few hours before the appointment)
- Alerts (package delivery etc.) (For example, a credit card is about to expire and the client can pick up his new one and is alerted of this through a WhatsApp message)
- Time – bound notifications (Example: gate changes, airline departure time)
- Contest participation (Example: the consumer gets an email from his mobile provider in which he is informed about a contest where he needs to send a WhatsApp message with the code 'Yes' to participate in the contest and as a result the first 100 consumers who send the message get a WhatsApp message with a code that gives them a reduction on their purchases.)

4 Restrictions and Limitations

Prior to be able to use the channel Clients need to contract with WhatsApp authorized partners/re-sellers. WhatsApp only works with **selected partners/re-sellers**. Please, find the list of them [here](#)

WhatsApp only works with **pre-defined templates**. They need to be set up in the environment of the client. Once they are set up, they will be visible in Selligent. (The number of templates that you can create depends on your contract. Essentials allows 10 templates, Business allows 100 templates and Enterprise allows an unlimited number of templates)

The templates need to be **approved by WhatsApp** before they can be used. This can take up to 3 days and is an automated process.

WhatsApp messages **cannot be used for advertising, marketing or as promotional messages**. This is one of the reasons why the templates need to be approved by WhatsApp.

Marketing **broad offers are NOT available** (it is not possible to broadcast messages)

An explicit **consent** from the Consumer is needed (opt-in) in order to initiate the conversation. This can be a page on your website for instance where the consumer clearly states he wants to receive your WhatsApp messages. It must be an active opt-in, where the consumer takes action to allow these messages, such as ticking a check box. Moreover, you must inform the consumer explicitly about the type of message they will receive (order confirmation, deliver times, etc) and the consumer must be able to edit the phone number for these messages. Note that if these rules are not respected, the WhatsApp account might be closed.

Currently we are only using **CM.com as a partner** in EU (CM.com offers global WhatsApp coverage. CM.com provides contracts in UR, USD, ZAR, CNY, JPY). We are working with Nexmo for the US market (geo-location is not important) . No other partners are currently considered

Recipients can flag or block the WhatsApp Business account. Too many flags will lead to status 'orange' and later 'red' in the CM.com management environment.

When you send templates/business initiated messages a score is kept track of (this is done using undisclosed algorithms). Depending on the responses by customers (reflected in this quality score), your rate limits go up or down (measured on a rolling 24 hour window).

When your quality of templates grows incredibly low, your account becomes restricted. That means you are banned from sending messages for up to 24 hours.

If this happens consistently, your account itself will be flagged internally at WhatsApp and WhatsApp will conduct an investigation. When there is reason for concern, your phonenumber can be blocked, or you can lose your business verification and even waba account.

Even if you do not send templates/business messages, but only responses to customer initiated messages, if enough users report your profile, your account can still be flagged for review by WhatsApp

WhatsApp wants to keep a personable and high quality network. If you are a 'good player' it is unlikely you will ever be blocked or not be able to send enough messages. If however you are a company with terrible business practices and/or send consumers messages with content that the customer has not signed up for, then WhatsApp will be strict and you can expect them to choose consumer interests over business interests.

5 Performance

The **speed** at which messages are sent out by CM.com is around 50 requests per second with bursts allowed up to 150 requests per second.

There are also limits for template messages: <https://developers.facebook.com/docs/whatsapp/api/rate-limits/#quality-rating-and-messaging-limits>

When messages are sent out from Selligent to CM.com, CM.com will queue the messages. It is recommended not to push more than **500 messages per second** to prevent huge queues and delays.

6 Reporting

CM.com also provides a few dashboards where you can check how your messages are doing. Status reports show

- 0 = accepted by the operator
- 1 = rejected by CM or operator
- 2 = delivered
- 3 = failed (message was not and will not be delivered)
- 4 = Read (Not for SMS, only other channels). Status 4 can be considered as interaction information

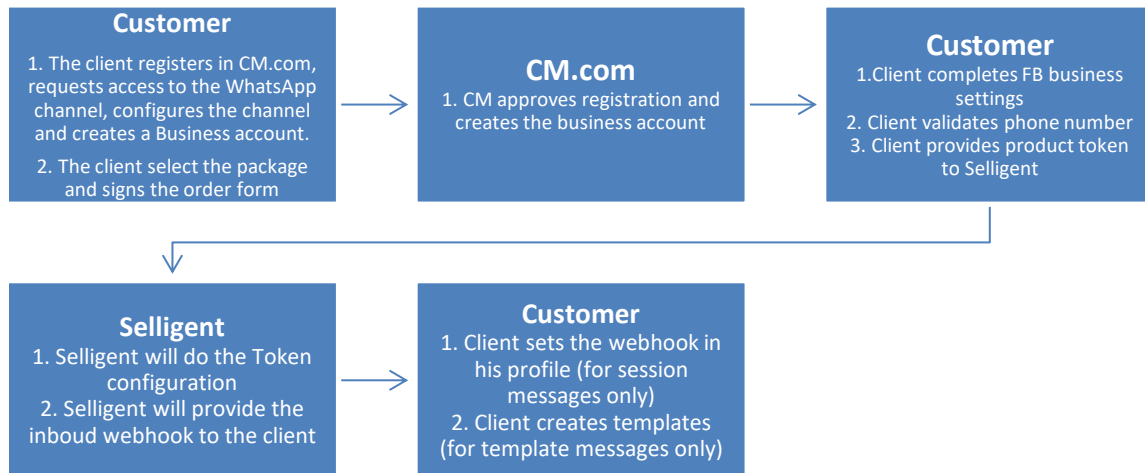
We don't receive information from WhatsApp about links being clicked.

7 Targeted Market and Verticals

Client	Vertical
Abbott	Healthcare
JBC	Fashion Retailer
Brussels airlines	Travel
Ifolor	Online Retailer
Burda	Media (Fashion)

8 Enabling WhatsApp

The whole process can take up to 2 weeks. After step 1, it can take up 3 business days to get the business account approved. Creating the templates and getting them approved can also take up 3 business days, but is most of the time faster. All the intermediate steps depend on the availability of resources at the client and at Selligent.



Step 1: These are taken by the client to activate, register and configure a profile for WhatsApp.

a. The client needs to **register** on <https://www.cm.com/register> and fill out name, first name, email and company name.

Discover the possibilities of the CM platform

Already have an account? [Sign in](#)

First name

Last name

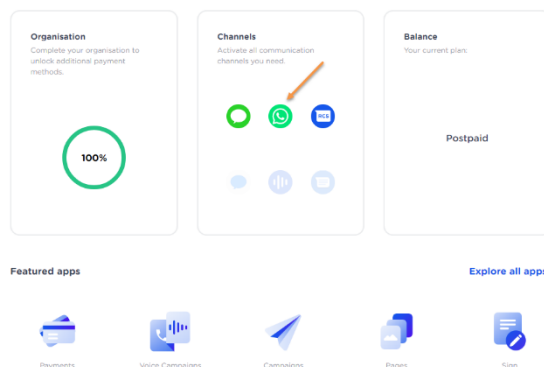
Email

Company

☐ I accept the [Terms and Conditions](#) and [Privacy Policy](#)

[Continue](#)

Hi Peggy!



b. Once registered, the **Channels** tile is visible on the Dashboard. Click the **WhatsApp icon** to configure the WhatsApp account.

c. In the Channels overview all available channels are listed.

Click the **WhatsApp Business** channel to request access and configure it.

Note: If you are already registered and have created templates before, you will see the number of templates that are currently there and how many are still pending.

Channels

Your channels

Here, you can view all your connected messaging channels, and the different accounts you have per channel. Want to use an additional communication channel, request it here.

SMS

WhatsApp Business
1/2 templates pending - 1 profile

Rich Communication Services (RCS)

Other channels

Apple Business Chat
Click to request access

Voice
Click to request access

Verified SMS
Click to request access

Request WhatsApp

Business Information

Here we request you to share information which will be used to create your WhatsApp account with CM.com and WhatsApp.

Legal Business Name*

Fancy Shoes Ltd.

Country of headquarters*

United Kingdom of Great Britain and Northern I...

Business Address*

40 Guild Street, EC3p 0UJ, London

Business Category*

Retail

Tax ID number*

764881191

Company Registration Number*

04084132

Facebook Business Manager ID

Used to link WhatsApp with your Facebook account

Contact person - WhatsApp related

This contact information will be used when there is a need to communication about WhatsApp related matters.

Name*

Rebecca Powell

Phone number*

+44 7773 776391

Email*

rebecca@fancyshoes.com

WhatsApp usage

We would like to understand how you will use WhatsApp within your organisation.

Use case

Customer care and shipping notifications

Where will you handle the conversations?*

Other

How/Where will you handle the conversations?*

BestRetailSoftware

How will customers opt -in for WhatsApp?

Via website registration page

Estimated messages per month*

20000

Cancel

Request

d. Next, to request access information needs to be entered regarding general business information, contact person details and the reason why WhatsApp will be used. Moreover, **Selligent** needs to be selected as the **software tool** to use. Also, ensure to provide the correct **Facebook Business Manager ID**. Please read the [instructions](#).

Click **Request** to launch the request process. An email will be sent.



Mail sent!

We have received your request and have sent you an email with further instructions. We suggest you already create a business profile?

[Not now](#)

[Create](#)

Create Business Profile



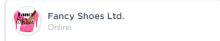
Business Profile

Here we are creating the input for what users will see in WhatsApp when they click on your profile, as well as what they see on top of a conversation.



Your company name*

Fancy Shoes Ltd.



WhatsApp phone number*



7411 122244

Your profile text*

Fancy Shoes make you feel great

Description about your company*

Fancy Shoes is the place to get yo...

Address*

40 Guild Street, EC3p 0UJ, London

Email*

contact@fancyshoes.com

Primary Website*

www.fancyshoes.com

Website 2

additional website

[Cancel](#)

[Create](#)

f. The Business profile is the information that customers will see when looking at your WhatsApp profile information. You can enter an image, company name, profile text, a description of your company, physical address, email and website.

Channels

Your channels

Here, you can view all your connected messaging channels, and the different accounts you have per channel. Want to use an additional communication channel, request it here.

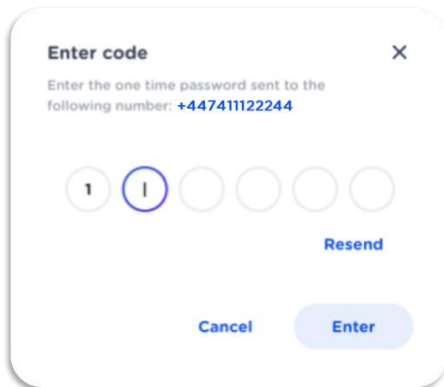


g. After registering and creating the business profile, the WhatsApp channel will have status "Pending". This status will remain until the Business account gets approved (This is most of the time within 3 working days)

h. CM.com will contact the client and offer a subscription (Essentials/Business/Enterprise/EnterprisePlus). These subscriptions impact for example the number of templates you can create. The client will sign the corresponding CM.com order form and send it back

Step 2. CM.com approves request and creates business account

- Once all information is complete, CM.com will create the WhatsApp Business account within 3 business days and the client will be informed by email.
- CM.com contacts the client to complete additional Facebook Business Manager settings



Step 3. Client validates phone number

- When the WhatsApp Business Account is created and the Facebook settings are completed, the client can trigger the One-Time-Password to validate the phone number.
- The OTP will be sent by SMS or by an automated phone call and the client needs to enter the code to finish the validation.

Outbound Messages

Here you can find your API key. You need this key for authentication, so you can send data to our gateway. If you want to receive status updates on the messages you have sent, you can configure that here too.

Product token / API key
BD1305E9-4CB8-4FF2-88E8-171D48069B5B

Status Reports
You haven't received any status reports yet.

[Edit](#)

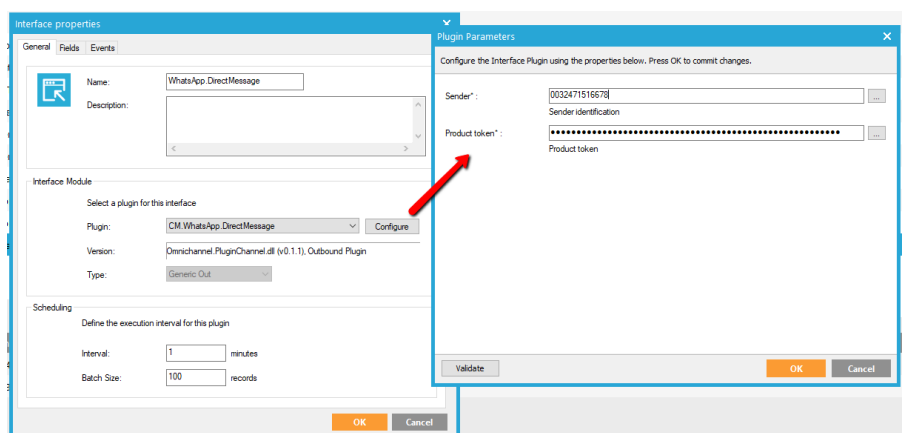
- Client will provide Selligent/Partner with the CM.com **product token** that identifies the client in the API used by the selected Selligent software. This

token can be retrieved from the WhatsApp profile in the section for outbound messages and will be used to configure the WhatsApp connector in Selligent.

Step 4. Selligent

- Selligent will configure the CM.com **product token** in the Selligent environment for the client, when configuring the WhatsApp interface for the WhatsApp connector. It also requires the phone number to use for sending out the WhatsApp messages.

- To configure the interface for the Template/Session message, go to Process/ Interfaces section and **create a new interface**.



a2. Define a name for the interface and select the plugin CM.WhatsApp.TemplateMessage for Template messages and CM.WhatsApp.DirectMessage for session messages.

a3. Click the **Configure** button to fill out the properties for this interface.

a4. Enter the **phone number** used to send the message and the Product ID. These settings are the same for both plugins. The **product token** can be retrieved from your WhatsApp interface, after completing the creation of the Business account. (See earlier in this document).

a5. When done, save the interface. It will be available from the Journey chapter, when adding the interface component.

b. The Selligent Service team will provide the **inbound webhook** to the client. This will allow CM.com to send inbound WhatsApp messages to the inbound webhook of the Selligent platform. (Session messages only).

Step 5. Client

a. The client will set the **webhook** in their CM.com WhatsApp channel settings.

Inbound Messages

Here you can define where you want incoming messages to be sent to. Via the "more information" button you can find how this solution works, and determine what is best for your situation.

☒ Messaging Log

CM application. Gives you real time insight on all sent and received messages. Includes status, content and channel information. Used for in-depth analysis of separate messages. [More Info](#)

☐ Email

Receive messages in your email. Used by users as alerts. When set-up, you can also reply to the messages per email. [More Info](#)

+ Enter an email address

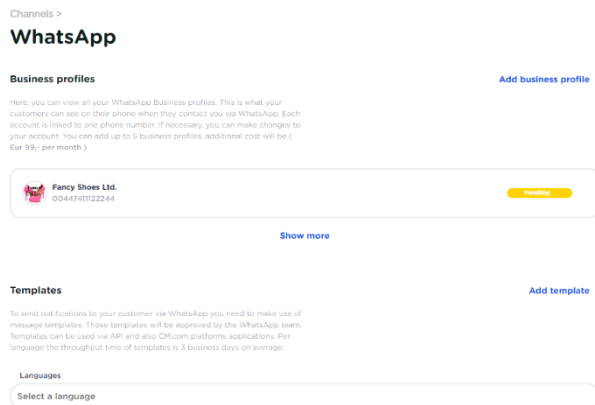
☐ Customer Contact

Activate to onboard and start using Customer Contact. [More Info](#)

☒ Webhook (contains custom callbacks)

Receive incoming messages in your own systems. [More Info](#)

Json - <https://svcsolser.slgnt.eu/Custom/...>



b. Client will create WhatsApp **templates** in CM.com. There are a series of default templates available, but the client can also create his own templates. These need to be approved by WhatsApp and this can take up to 3 business days (most of the time done in 1 or 2 days). This is an automated process and the client will see in the WhatsApp interface when the template has been approved.

Adding **languages** will allow the configuration of templates per language. A preview of each template is available.

b1. To create a template, click **Add template**.

b2. You can choose from the following categories /types to create a template. The reason for this is to restrict the WhatsApp messages to non-promotional messages. The category indicates the type of message you would like to send and when WhatsApp checks the template against the content, they will reject the template if it does not comply

- Account update
- Payment update
- Personal finance update
- Shipping update
- Reservation update
- Appointment update
- Transportation update
- Ticket update
- Issue resolution
- Alert

Add template

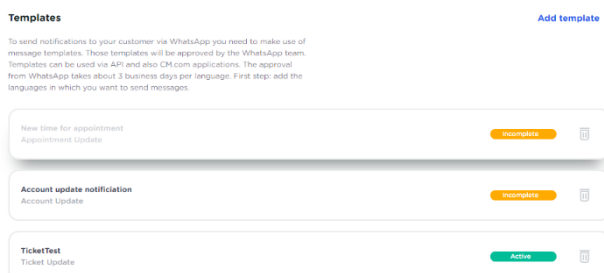
Category

Appointment Update

Name

New time for appointment

b3. Press **Save** to save this template. The template is added to the overview of templates, but is still incomplete:

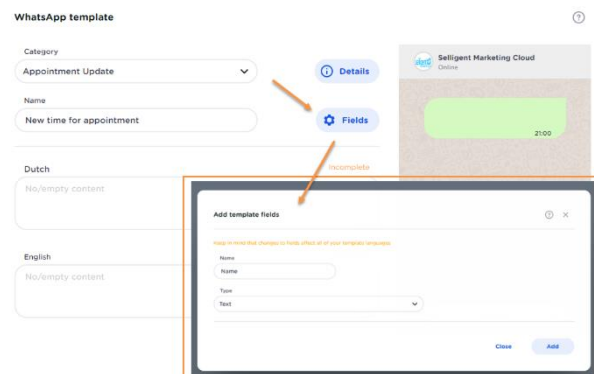


b4. Click the button **Incomplete** and access the properties of the template. In here you can define the content of the message in the different languages selected for the template.

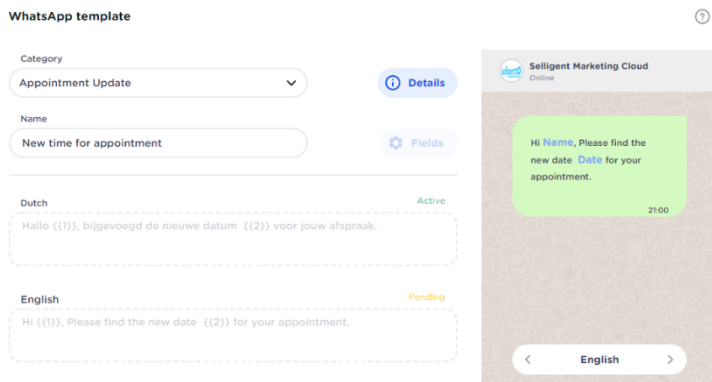
Merge tags can be added as placeholders and these tags will be filled out automatically based on the configuration when the interface is used in Selligent. To be able to use these merge tags, fields need to be configured for this template.

b5. To do so, click the **Fields** button and set the name and type of field in the 'Add Template fields' dialog.

Once this field is added to the template, you can use it in your message. You can add up to 10 fields.



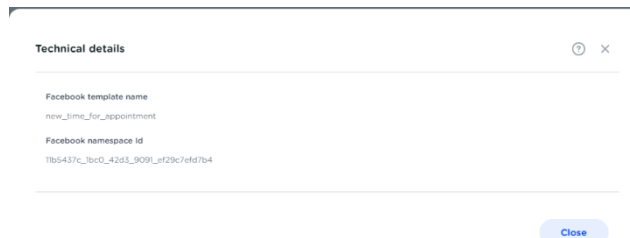
Example:



Hello {1}, please find the new date {2} for your appointment.

Where parameter 1 and 2 will be replaced with personalization fields when used in the Selligent journey.

Note: when creating a template, you can access the technical details of the template. Click the Details button to view the template name and namespace id. You will need this namespace id later on when using it in a journey.



c. After all is configured, the client can keep an eye on WhatsApp and the template settings through the Channels app at CM.com.

9 Troubleshooting

The WhatsApp feature in Campaign is supported through the use of a plugin interface. This means that the standard interface tables are used for storing the interfaces. You can also consult Campaign to have info on when the interface was executed, and in which journeys the interface is used.

SELECT * FROM interface => to check the plugin interface installed.

Interface record states

- 1= pickup
- 2= in progress
- 10= error
- 20= batch: file was created but not yet send
- 25= wait feedback
- 30= success (executed)
- 35= feedback error: successfully processed but a feedback error has occurred
- 40= feedback
- 50= canceled
- 60= no handler: no handler was found (incomplete dispatch logic)
- 61= blocked by rule

Also, information can be found in the Campaign agent logs.

10 Document Details

Document creation	Peggy Heyvaert	11/02/2020
Document review	Peggy Heyvaert	17/07/2020