Whatsapp Central Document

Overview

Whatsapp is an immensely popular chatting app used by 1.5 Billion people worldwide. It has an easy interface and can be used powerfully with Odoo.

This module is a Centralised solution and can have multiple use cases like, helpdesk, FAQ, promotions, Survey, Feedback etc.

This is like an IVR for whatsapp which can be called an interactive text response system.

A simple solution is the best solution and this application is the perfect example of this saying.

Features

- ❏ Automatic Chat Bot.
- ❏ Interactive.
- ❏ Reduced human errors.
- ❏ Quick Automated Response.
- ❏ Higher Customer Satisfaction.
- ❏ Easy onhand Solutions.

How does it work?

Configuration

It is difficult to get a signup for WhatsApp for business directly and get access to the API as the signup process takes too long. Hence, it is better to sign up for third party whatsapp API services such as ApiChat. Also selenium could be used for free but it is not robust and reliable and cannot handle large volumes of load.
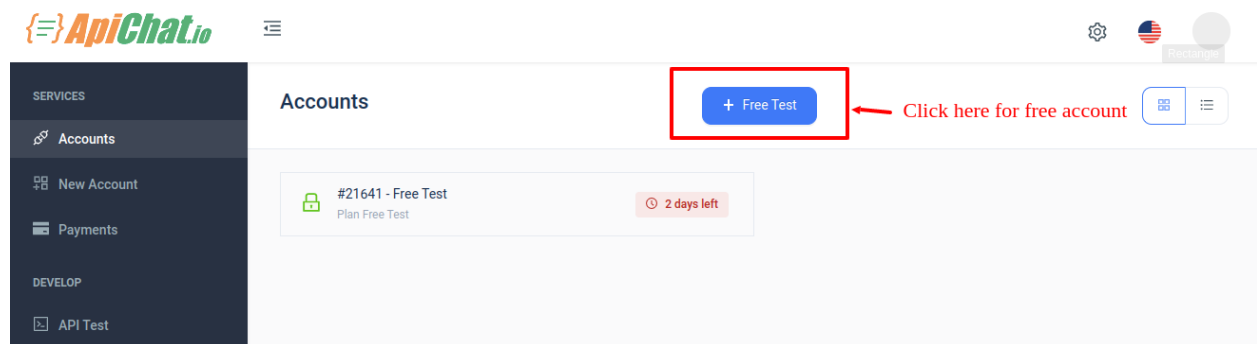
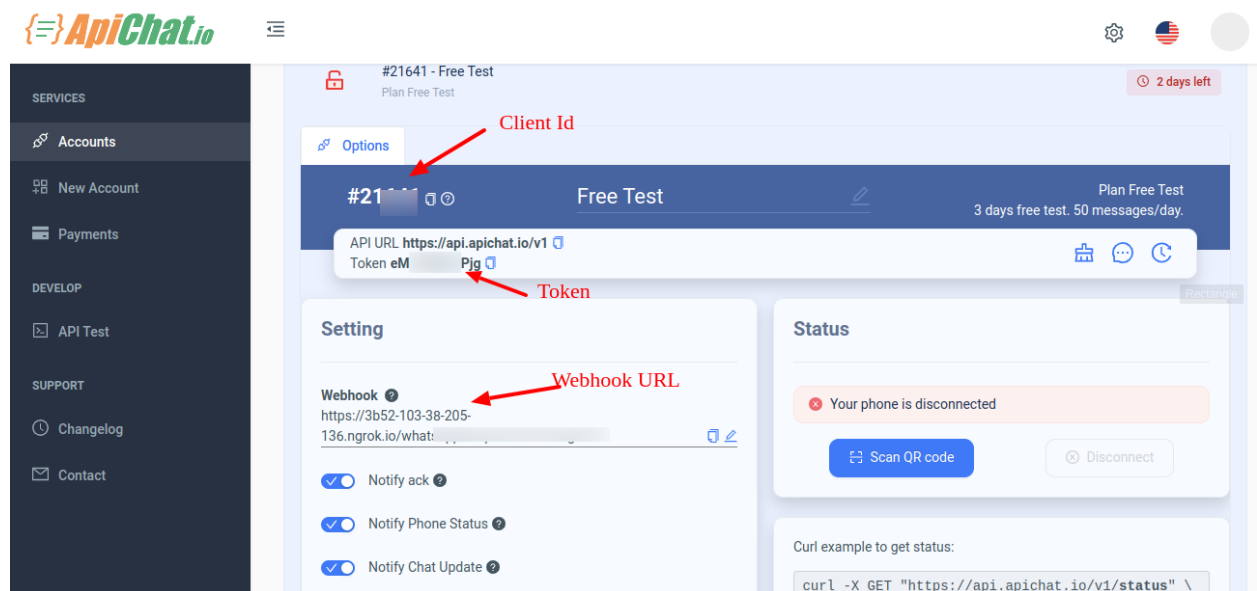You need to signup for a ApiChat account:

https://panel.apichat.io/auth/login

Click on "Add new Instance" to create an instance.
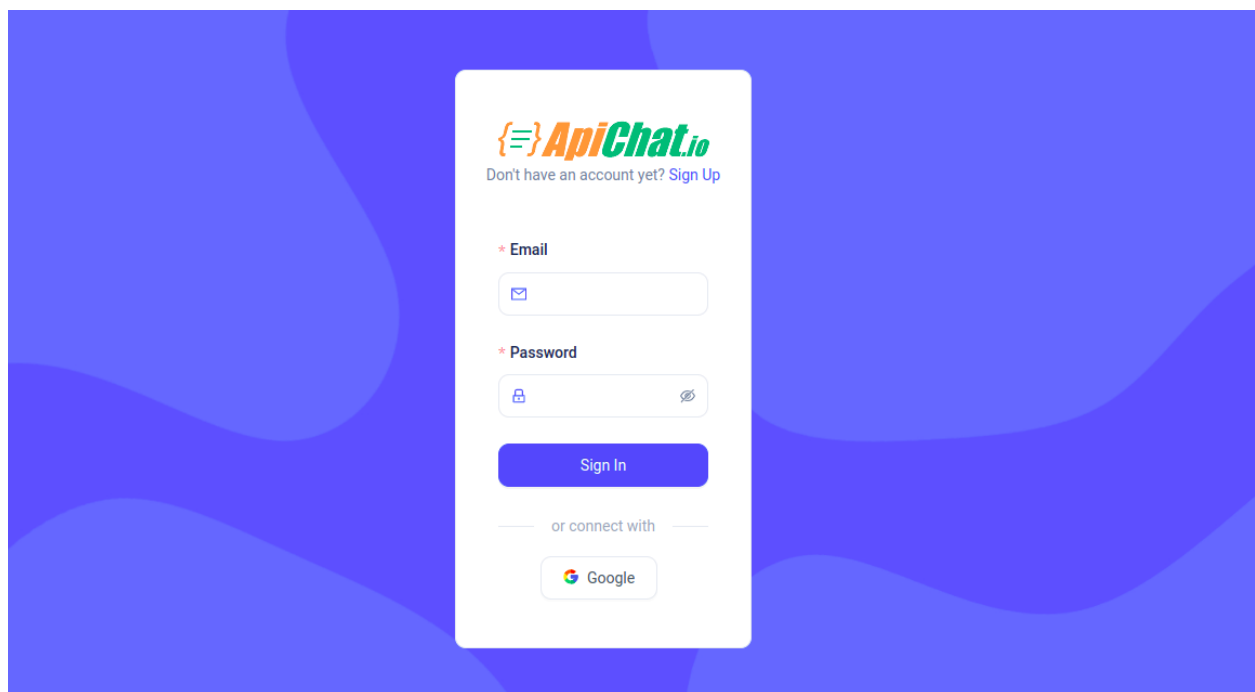
After login go to the Accounts and click on Free test if you want test or Pick plan for paid from New Account

After it you will see the Client, Token url etc…

You can also configure the Webhook URL and you can also scan the QR code from here as well from Odoo also.

Configure the webhook url to accept the messages from whatsapp into Odoo.

If you create a free account then your account will expire in 3 days after that you need to purchase a subscription

If you scan QR code from ApiChat no need to scan QR code from Odoo & vice versa.

In Odoo, go to Whatsapp Helpdesk Menu -> Settings and Paste the credentials for Whatsapp Instance Client and Whatsapp token copied from whatsapp ApiChat.

Here you can define the Client and Token from ApiChat.

Initial Message is used for when we enter any word from this it will give us the proper message first time here we have set the hello, hi, hey. It is the configuration part where we can change anything.

Main Menu Prefix here we have set the * for main menu when we enter * and sending it will give us the initial message response.

Previous Menu Prefix is used to go to the previous menu message list.

If you scan QR code from chat api no need to scan QR code from Odoo & vice versa.
If you want to scan the code then In Odoo, go to Whatsapp Helpdesk Menu -> Settings and click on the Get QR Code button and scan QR code from mobile Whatsapp Web.
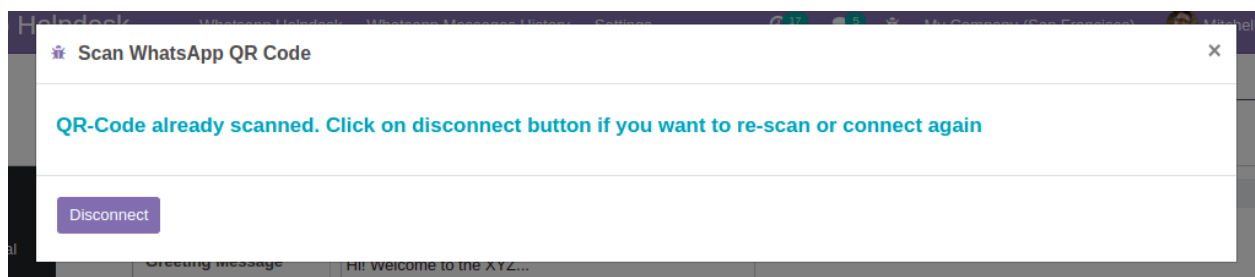
🐞 **Scan WhatsApp QR Code**

Close the window after few seconds, Once you get logged in signal from your mobile device.

After you scan, the QR code from your mobile is authenticated.

If you click again on the Get QR Code button then it will allow you to disconnect functionality from Odoo as well.

Following conditions need to rescan QR code:
1) If the QR code is not scanned within 45 seconds, the QR code will expire.
2) If whatsapp endpoint or whatsapp token is not added correctly & not getting QR code.
3) If the authentication fails/accidently wizard is closed then you need to click on the logout button after that click on Get QR code.

Configuration of bidirectional messages (send & receive messages from whatsapp in Odoo):

In Odoo activate developer mode Goto Technical → System Parameters → web.base.url → Copy Value

Chat API Configuration:-

In the webhook url you need to paste the value (copied from Odoo web.base.url) after that add **"/whatsapp_message_endpoint"**
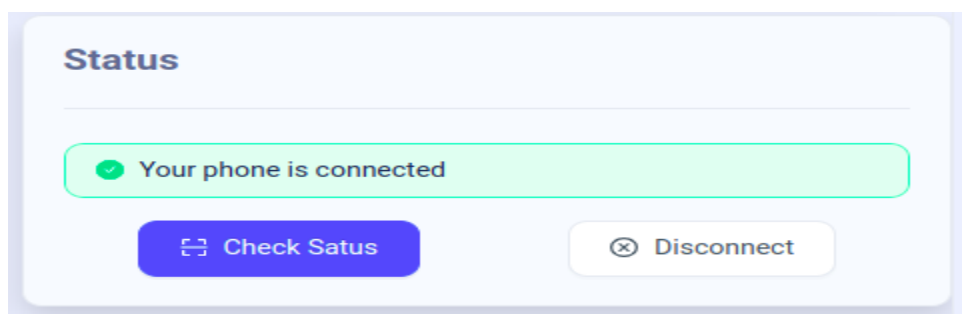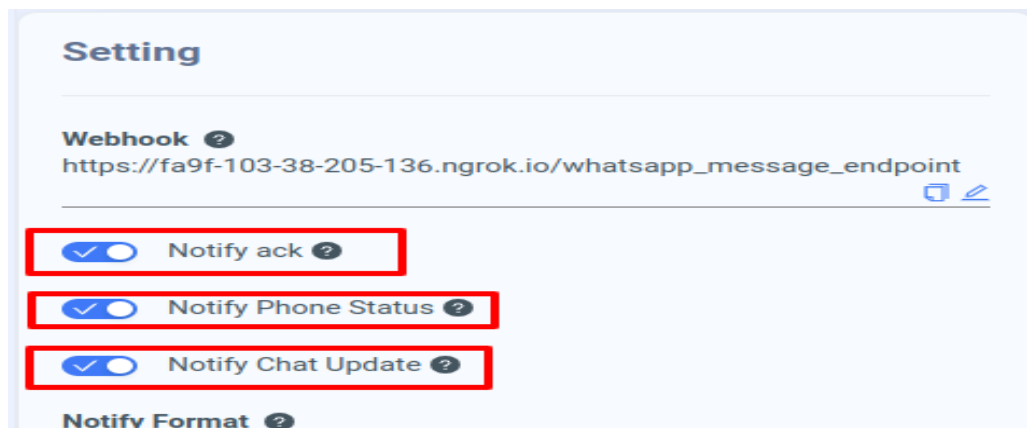
Webhook url : base url + /whatsapp_message_endpoint

Ex : https://staging.pragtech.co.in/whatsapp_message_endpoint

  Base url: https://staging.pragtech.co.in/

  Controller path : /whatsapp_message_endpoint

In the configuration of the APIChat refer to the below example & enable all fields **Notify ack, Notify Phone Status, Notify Chat Update**

Your phone must be connected when using this functionality.

Preconditions to send a WhatsApp message to any contact:

1) Check you have only one database(in case multiple databases are there then bidirectional functionality will not work).
2) Check you have an https Odoo url.
3) If the QR code is not scanned from Odoo or chat api:

   If the QR code is not scanned from Odoo or apichat then it will not work.

Setup & Functionality.

In Odoo, go to Whatsapp Central Menu -> Whatsapp Central
Here you can create the parent child records.

Hierarchy Level.

Organization Chart

- Man — M — 12
- Apperals — AP — 11
- Jackets — 1 — 8
  - Leather Jacket — LJ — 5
    - Gucci Jacket — L1
    - Image Testing — L2
    - Video Testing — L3
    - Audio Testing — L4
    - File Testing — L5
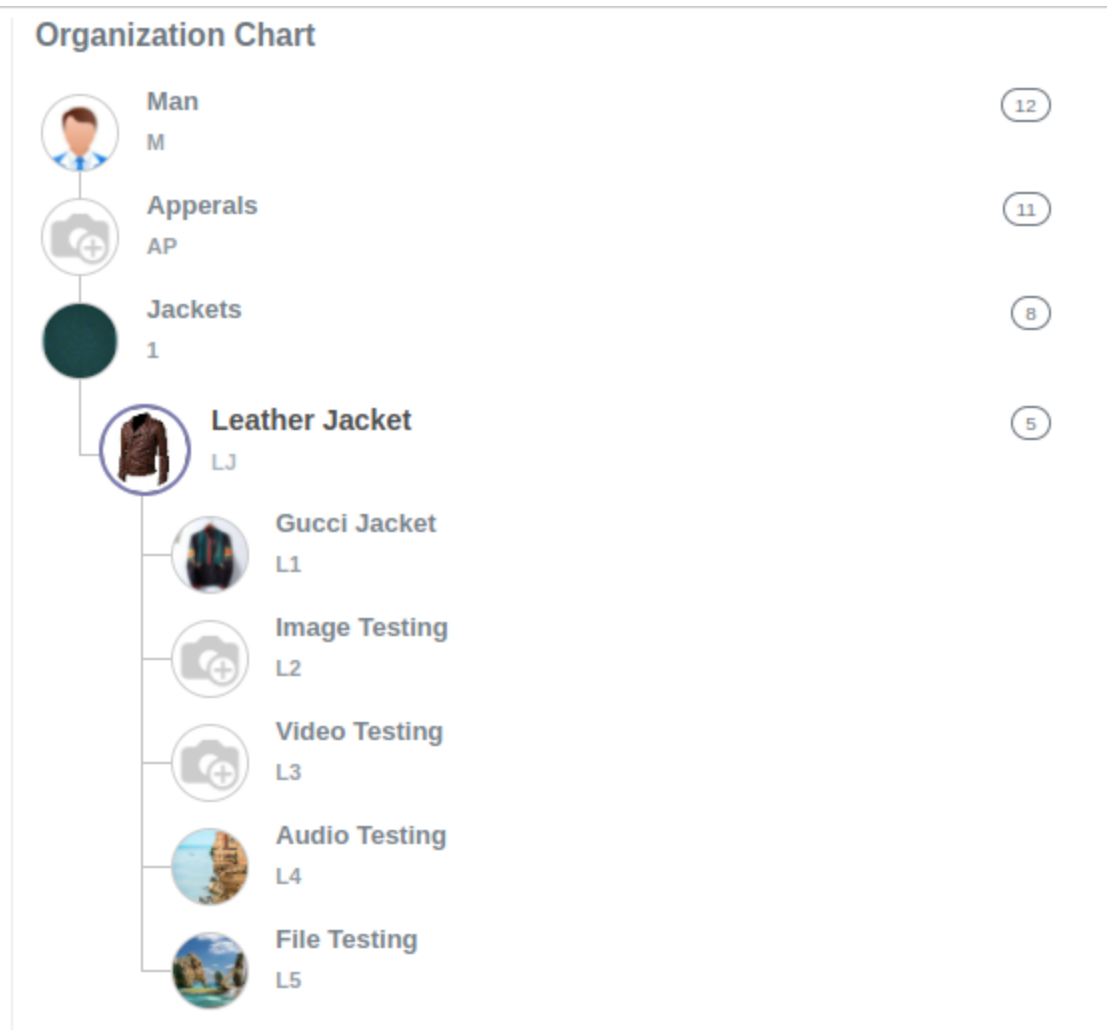
We have defined this above level hierarchy. Currently we have configured the different actions in particular records. for example in Gucci Jacket we have set the

Here we have defined the Action and we have also set the type. We have defined the following type in the action:

Send Text: You can send the text message whatever you have set in the URL as a text.

Send Image: It will send the image file you have set in the URL.

Send Video: It will send the Video file of the set URL.

Send Audio: It will send the Audio file of the set URL.

Send File: It will send the File of the set URL.

We can set as per our requirements and select the type and set the URL.

After setting up all the configuration of the action type. We just need to send the message on the scanned number. By default the initial message is the hello, hey or hi and it is the configuration which we have defined above.

When we send the message Hello, Hey or Hi. This is not case sensitive.

It will give the response based on what we have configured.
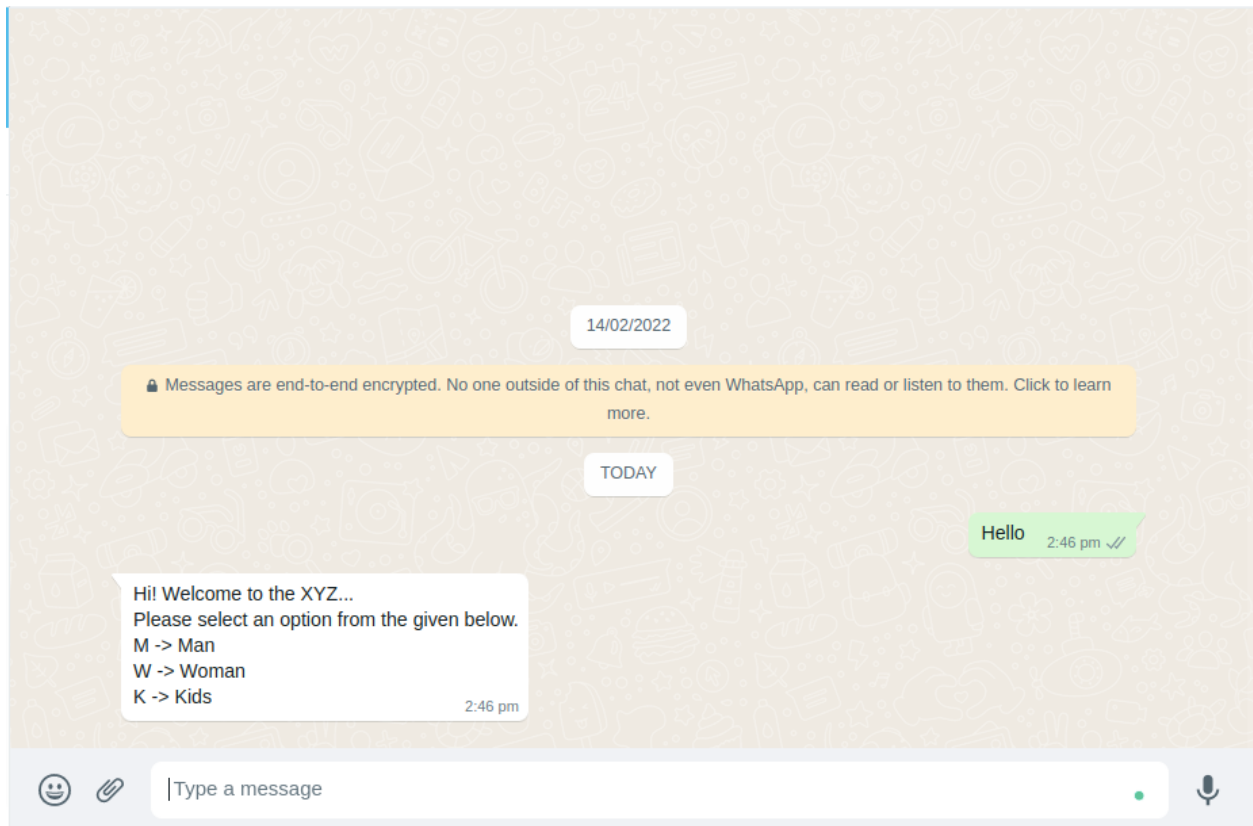
If we type M or m it will give another response based on what we have configured.
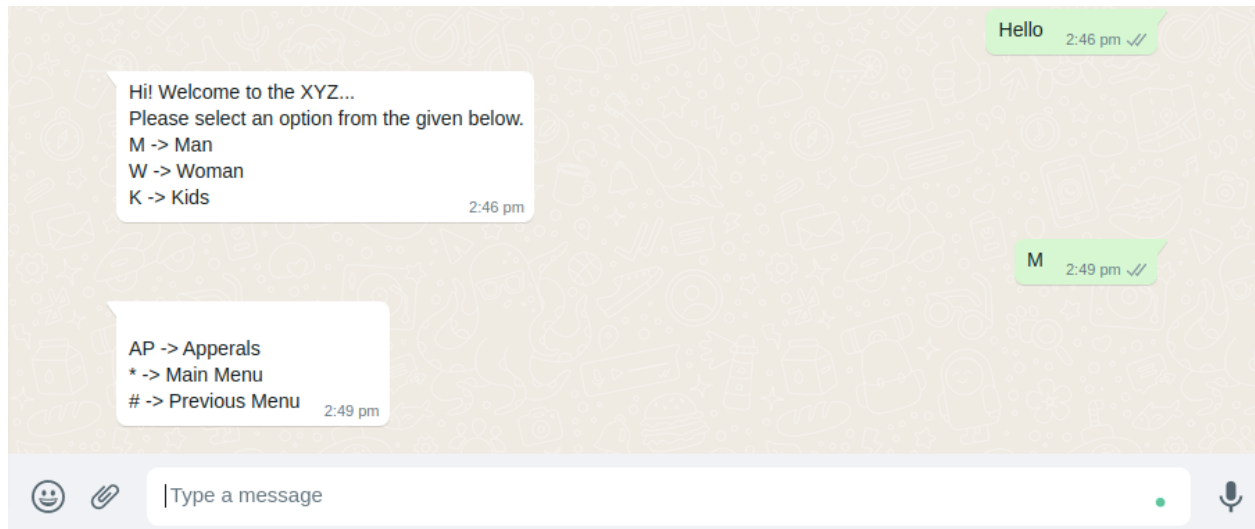
If we send the wrong code then it will give the below message.

If we send the proper code like AP or ap etc then it will give the below response.

```
AP -> Apperals
* -> Main Menu
# -> Previous Menu    2:49 pm
```

```
X    2:55 pm ✓✓
```

```
Please Enter the proper code from above code or enter Hello, Hi or Hey!
                                                              2:55 pm
```
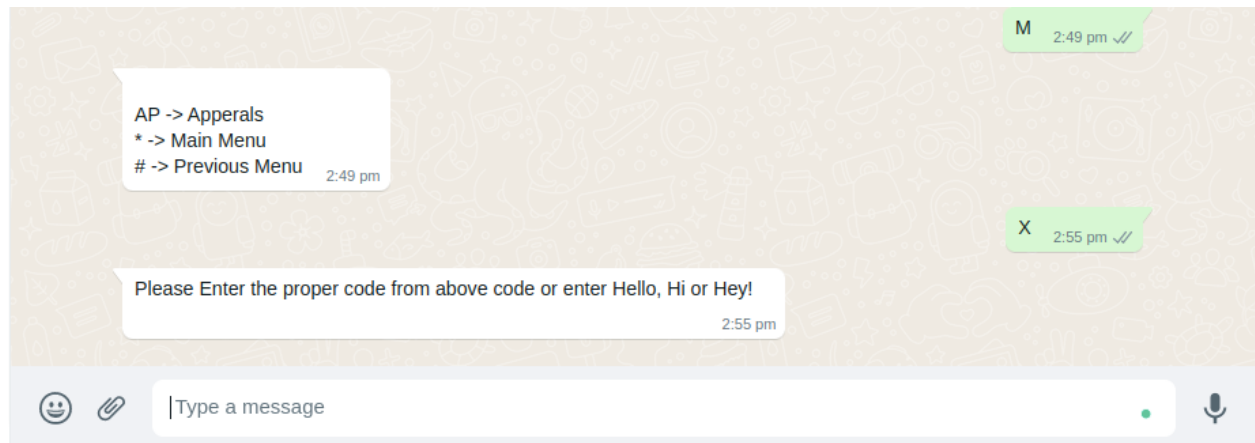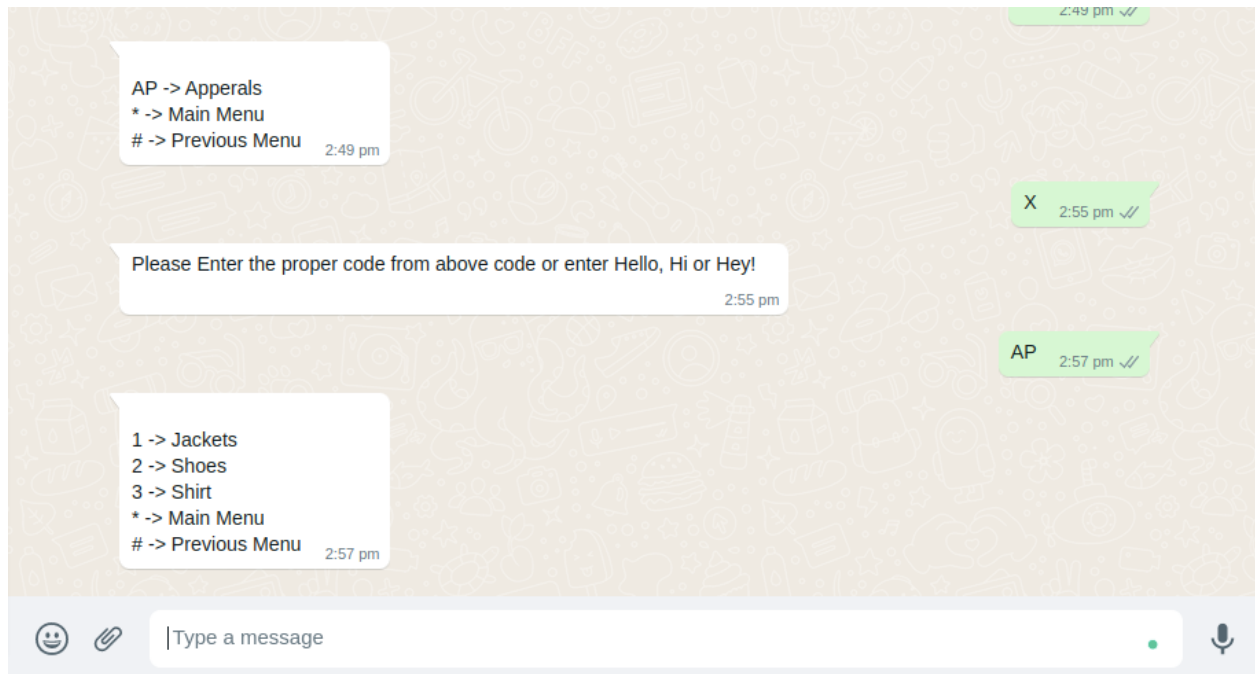
```
AP    2:57 pm ✓✓
```

```
1 -> Jackets
2 -> Shoes
3 -> Shirt
* -> Main Menu
# -> Previous Menu    2:57 pm
```

If we want to go to the Main Menu (We can send the *) or Previous Menu (We can send the #) then we can also send the code for that. This code is also dynamic for Main and Previous Menu. We can configure this depending on our requirements.

If we send the ***(Which we have set the Main Menu Code)** then it will give the Main Menu response.

```
                                                      AP   2:57 pm ✓✓

  1 -> Jackets
  2 -> Shoes
  3 -> Shirt
  * -> Main Menu
  # -> Previous Menu    2:57 pm

                                                      *    3:06 pm ✓✓

  Hi! Welcome to the XYZ...
  Please select an option from the given below.
  M -> Man
  W -> Woman
  K -> Kids
                          3:06 pm

  😊  📎   |Type a message                          •   🎤
```
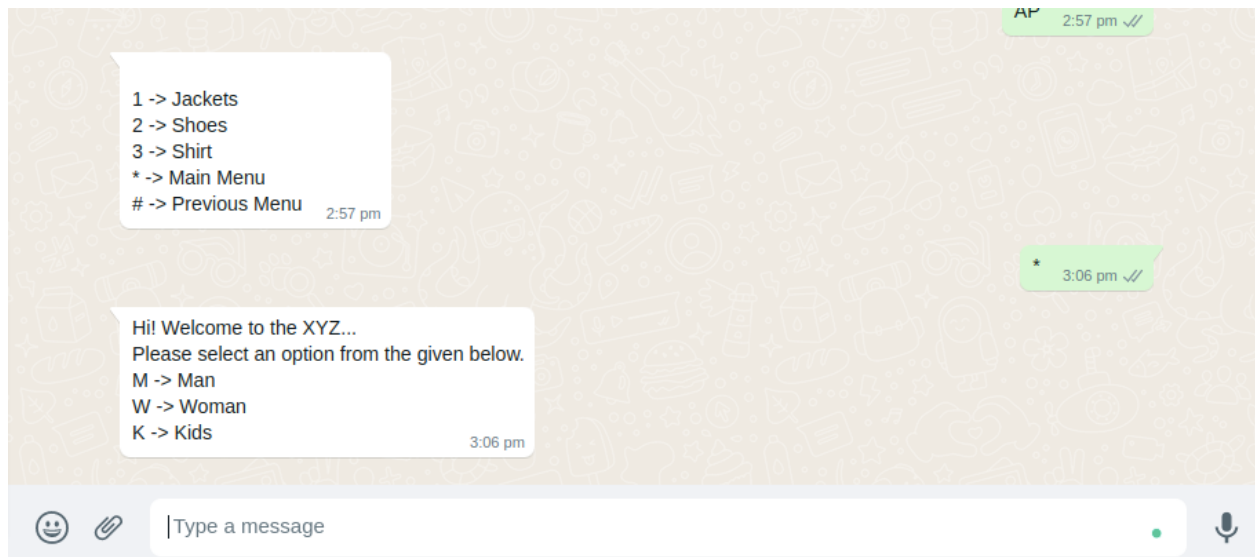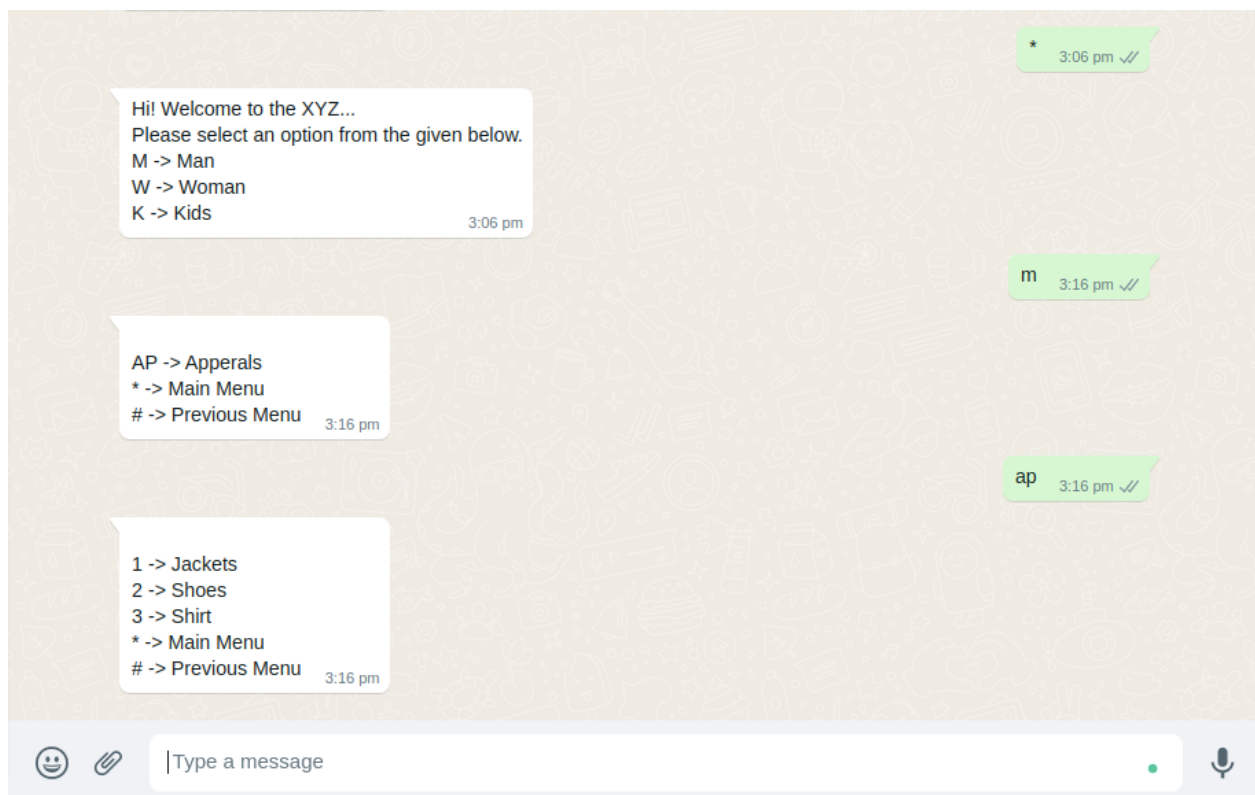
Again we send then **M** then send the **AP** so it will return the below Message.

```
                                                      *    3:06 pm ✓✓

  Hi! Welcome to the XYZ...
  Please select an option from the given below.
  M -> Man
  W -> Woman
  K -> Kids
                          3:06 pm

                                                      m    3:16 pm ✓✓

  AP -> Apperals
  * -> Main Menu
  # -> Previous Menu    3:16 pm

                                                      ap   3:16 pm ✓✓

  1 -> Jackets
  2 -> Shoes
  3 -> Shirt
  * -> Main Menu
  # -> Previous Menu    3:16 pm

  😊  📎   |Type a message                          •   🎤
```

In this Example we have added the 4 to 5 level Hierarchy.

If we type **1** and send then it will give us another list of the options and again if I type **lj or LJ** then it will give us another menu. This is the last one. It is based on the configuration.
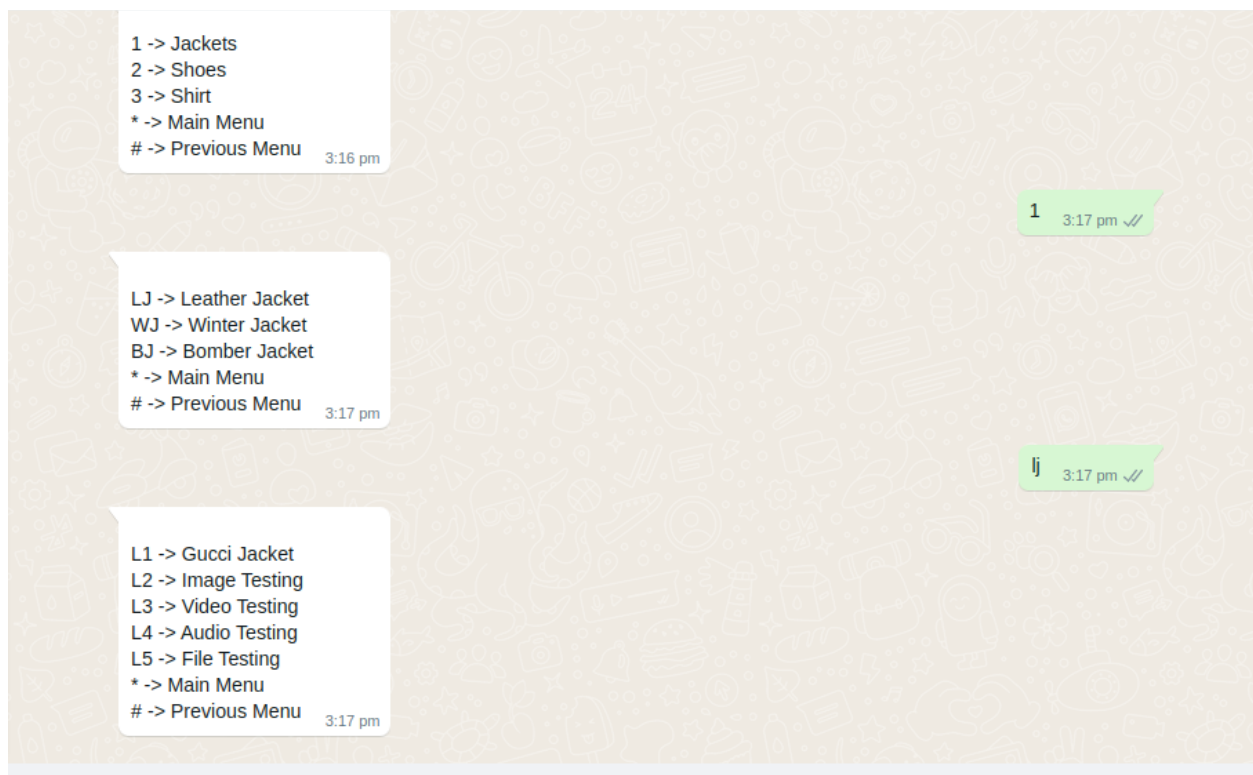

In the above last message we have configured a different action. This example is set for the testing purpose.

Now i Type the **L1** and send it. It will give the below response.
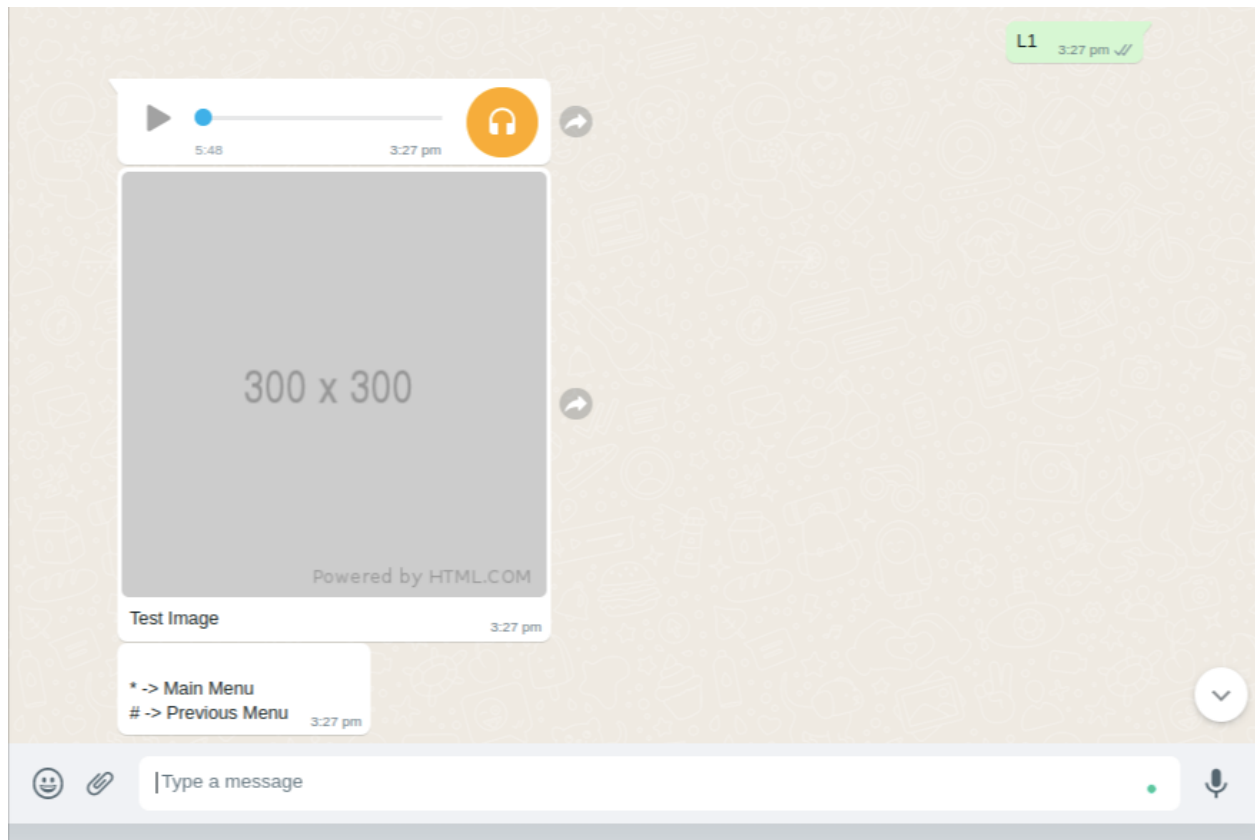
Here it gives the response the Audio File and the Image File because we have configured it in the action. Which we have already configured above.

If we Type the **L2** and send it. It will give the below response.
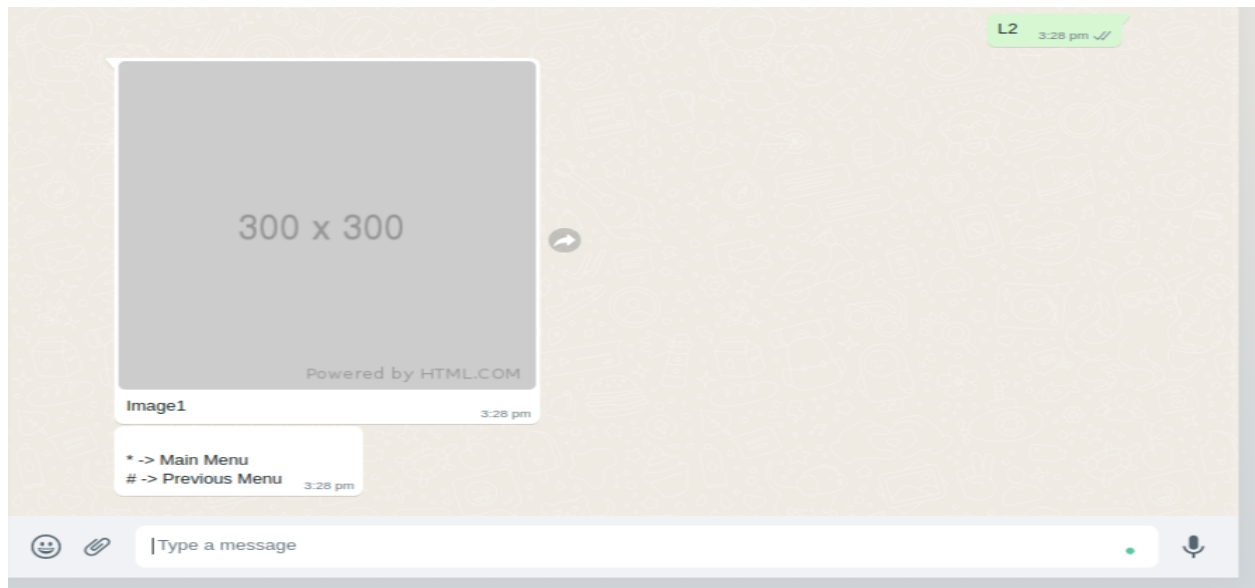
Above response comes because we have configured it below.

Edit   Create   ⚙ Action   8 / 15

	Apperals	
	AP	11
	Jackets	
	1	8
	Leather Jacket	
	LJ	5
	Image Testing	
	L2	

Action

Type	Name	URL
Send Image	Image1	https://_____0.png

If we Type the **L3** and send it. It will give the below response.

Above response comes because we have configured it below.

If we Type the **L5** and send it. It will give the below response.

Above response comes because we have configured it below.