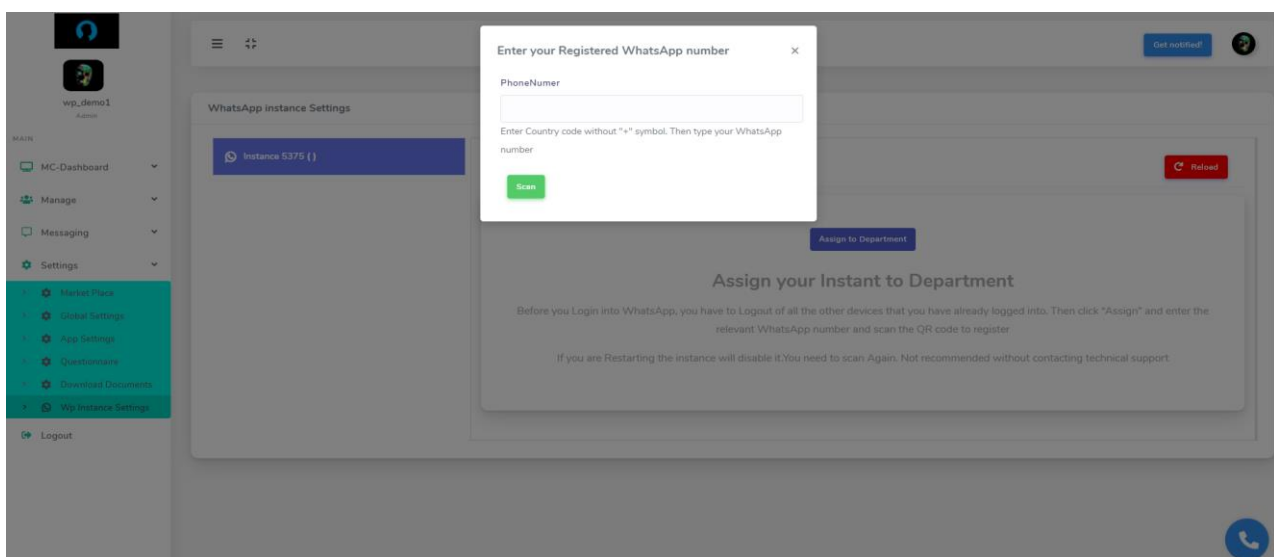


OmniChannel WhatsApp

How to Login to Omnichannel WhatsApp?

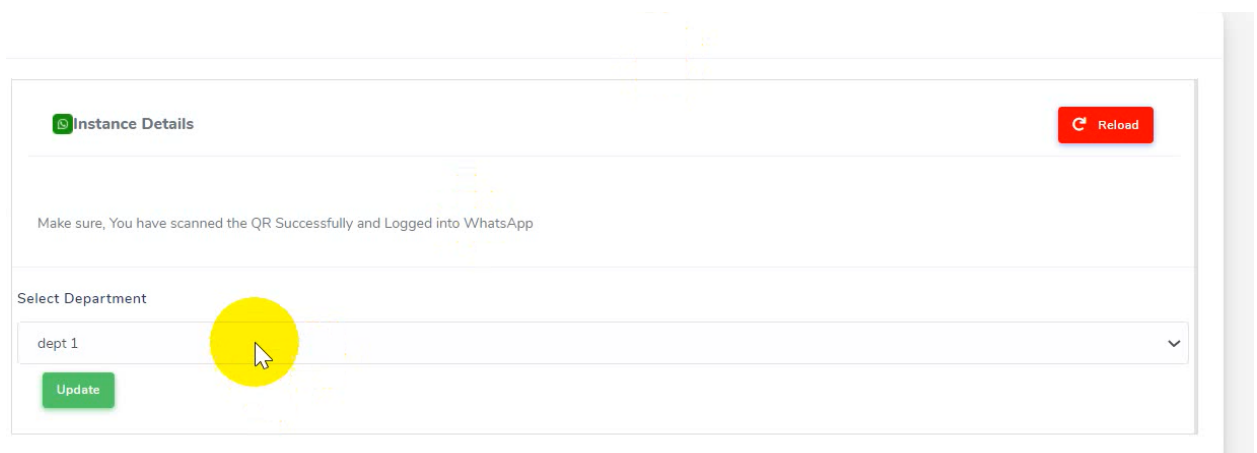
Login into Omnichannel. Go to “Settings” and click on “Wp Instance Settings”. Now, click on the instance created for your organization. Then, click on “Assign to Department”. A dialogue box will open asking you to “Enter your Registered WhatsApp number”.



Enter your “Country Code” first, without the “+” symbol. Then enter your registered WhatsApp number in “Phone Number”. Now Press “Scan” button. The scanner will appear. Scan with your WhatsApp Web and wait for atleast 60 seconds to pass the scanner. If you have trouble in scanning, “Reload” once.



Once you have scanned properly, you will find a screen asking you to “Select Department”. Click on this to select the Department to which you want your WhatsApp number to be assigned. After you have selected the relevant Department, click on “Update” button. A message will pop-up saying, “Instance is assigned successfully”.

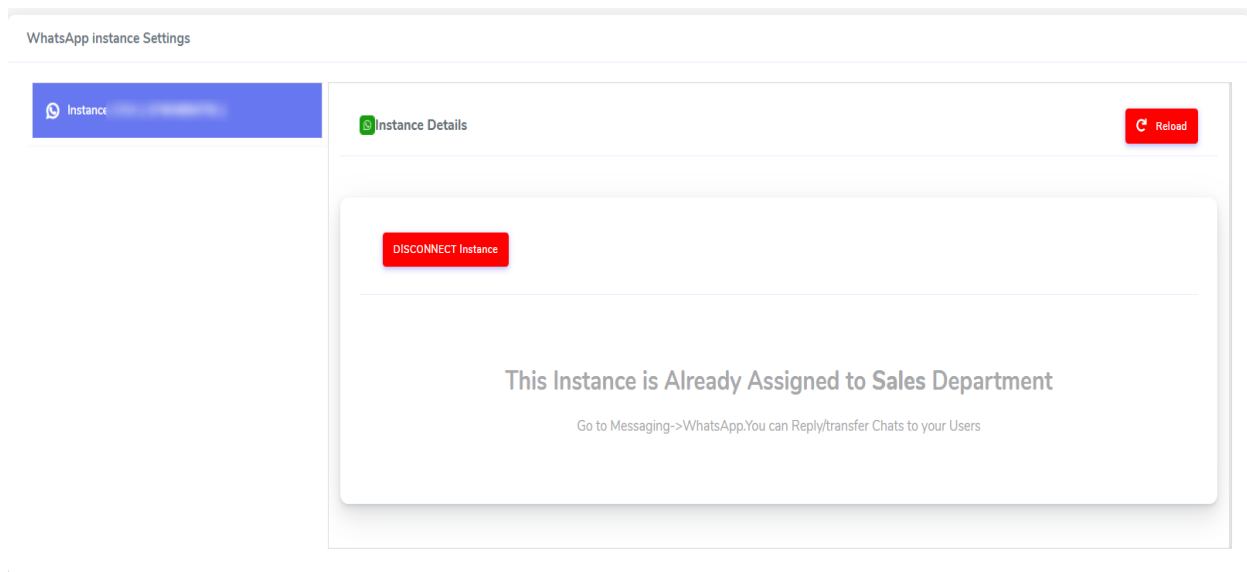


It means that your registered WhatsApp number has been added to Omnichannel. This can be confirmed if your registered WhatsApp number gets displayed on the “Instance” in “WhatsApp Instance Settings”.

What should you do when you are not assigned successfully?

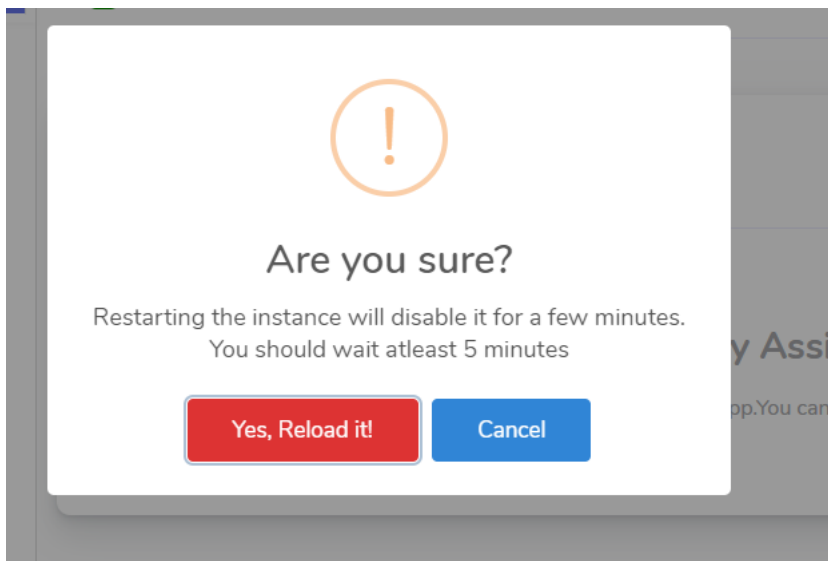
If the message says “Instance is assigned successfully” but your registered WhatsApp number is not getting displayed on the “Instance” in “WhatsApp Instance Settings”, then in the “Disconnect Instance” page, click on the “Reload” button. Now a pop-up will appear asking for confirmation on whether you want to restart the instance. To confirm, you have to click on “Yes, reload it!” and have to wait for at least 5 minutes. Now a page appears where you can see “Disconnect Instance”. When you click on this, a pop-up will appear that would help you to log out your instance.

Whether it is an Android or I Phone, you need to reload the instance once again.



How to reload?

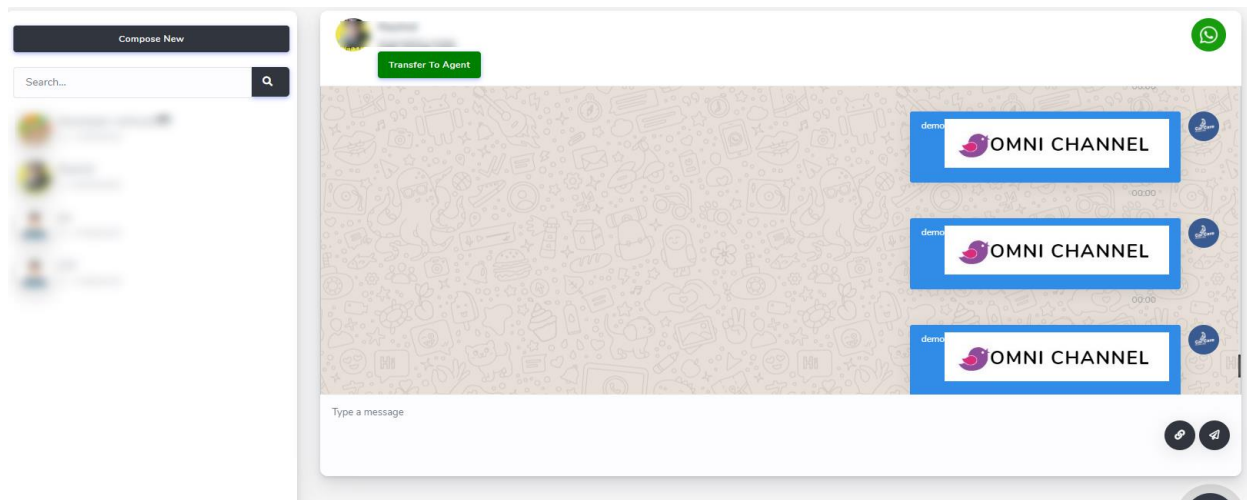
For this, go to “Reload” and click on the button. A pop-up will ask for confirmation. Click on “Yes, reload it!” and wait for at least 1 minutes. Now a dialogue box will open asking you to “Enter your Registered WhatsApp number”. Enter your “Country Code” first, without the “+” symbol. Then enter your registered WhatsApp number in “Phone Number”. Now Press “Scan” button. The scanner will appear. Scan with your WhatsApp Web and wait for atleast 60 seconds to pass the scanner. Once you have scanned properly, you will find a screen asking you to “Select Department”. Click on this to select the Department to which you want your WhatsApp number to be assigned. After you have selected the relevant Department, click on “Update” button. A message will pop-up saying, “Instance 1 is assigned successfully”. It means that your registered WhatsApp number has been added to Omnichannel. This can be confirmed if your registered WhatsApp number gets displayed on the “Instance” in “WhatsApp Instance Settings”.



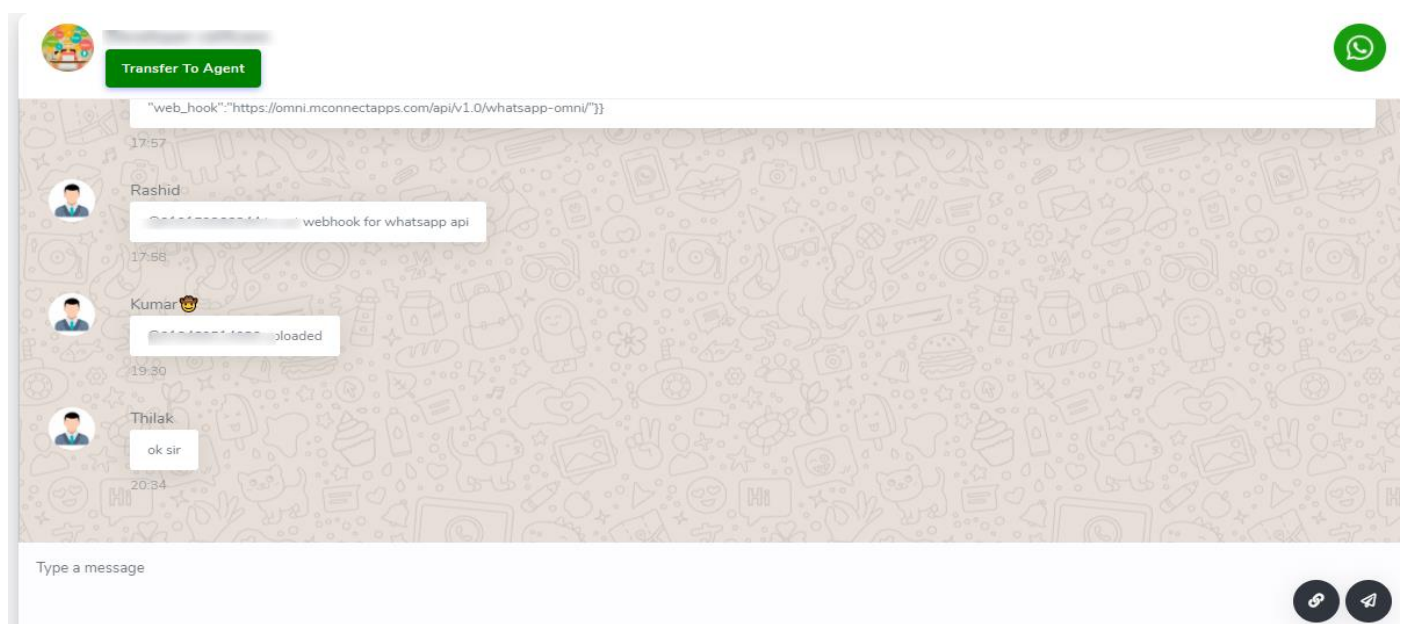
Your registered WhatsApp number will be shared to the Agent assigned to the specified department and the gets to involve in customer handling process. The transfer to an Agent can be revoked at anytime by clicking on “Revoke”. Once you click on “Revoke”, the transfer will be cancelled.

What happens next?

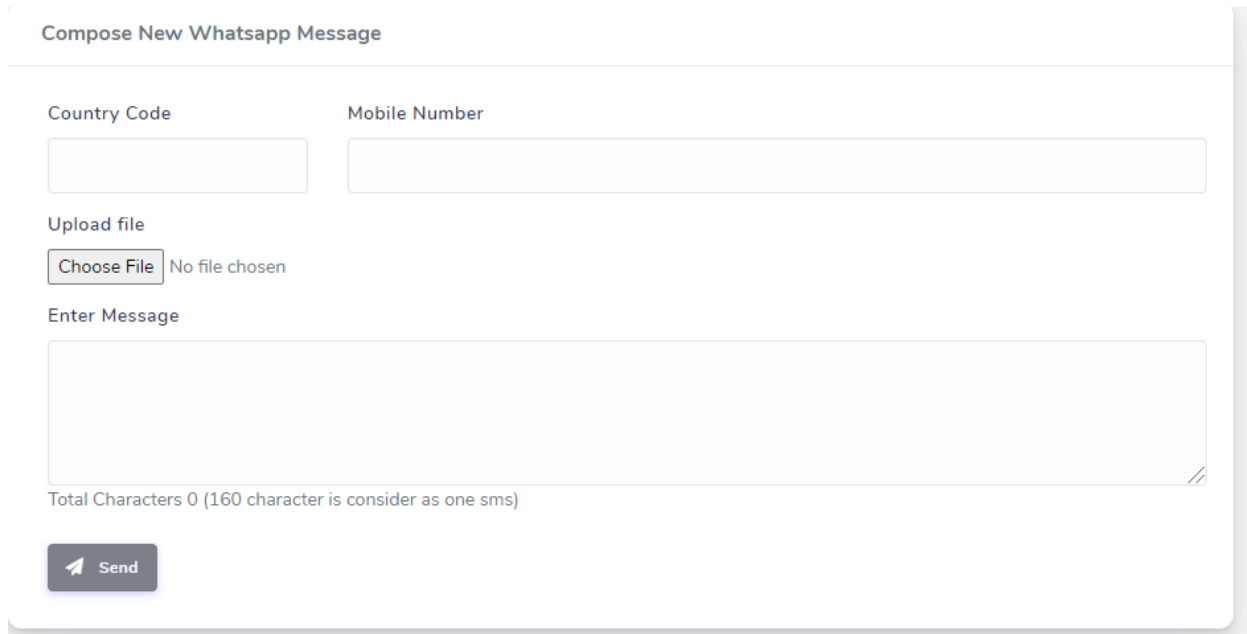
You can now start to send individual and Group messages to your Contacts, that is, the contacts who messaged to you after you had scanned your WhatsApp successfully and had created the instance with Omnichannel. All you have to do is go to “WhatsApp” in “Messaging” and click on the Contact to whom you want to send the message. A chat panel will open and you can view all the messages and can reply.



Group Messages :



How to send messages to a new Contact?



Compose New Whatsapp Message

Country Code Mobile Number

Upload file

Choose File No file chosen

Enter Message

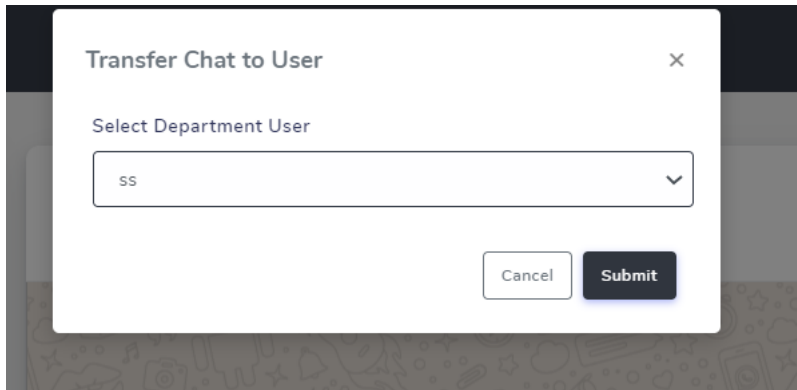
Total Characters 0 (160 character is consider as one sms)

Send

When you try to message to a Contact, if a message appears as “Not in Contact” then, it means the Contact whom you are trying to message has not messaged after you have scanned your registered WhatsApp number. So, to send message to a new Contact, go to “Compose New” (“Messaging” → “WhatsApp” -> “Compose New”).

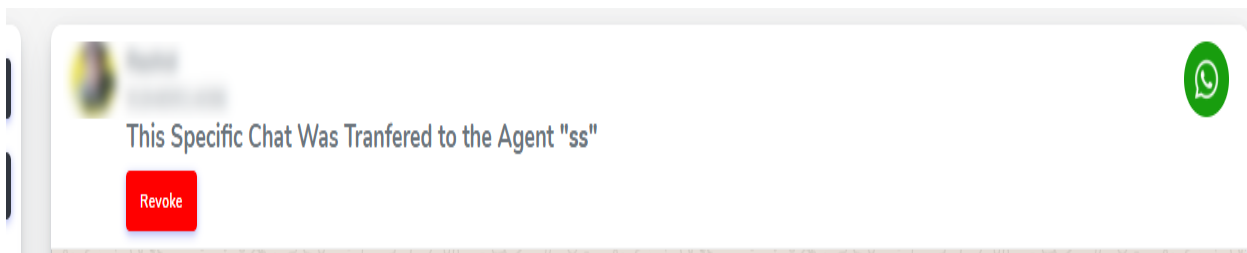
A dialogue box will appear in which you have to enter your country code in “Country Code” and mobile number in “Mobile Number” and start to message in “Enter Message” and click on “Send” to send the message. You can also send multimedia files in “Upload File”.

How can an Agent be transferred to the chat?



You can simultaneously transfer your chat to the Agent who has been assigned to that Department. For this, click on “Transfer to Agent”. A pop-up will appear. Select the Agent from “Select Department” and click on “Submit”. From now on the chats will be transferred to the particular Agent and you can see a notification: “This specific chat was transferred to the Agent “Agent3”. There will also be a pop-up indicating “Chat successfully Transferred to Agent”. If the Agent starts to chat that will be displayed in the chat panel with the Agent’s image and Id.

How can I revoke the Agent from the chat?



If an Agent has to be taken back, then you have to go to “Messaging” and in that “WhatsApp” and click on the “instance” and go the chat panel and click on “Revoke”. The Agent will be taken back immediately. You will get a pop-up message indicating “Chat successfully revoked from agent3”. Now this particular Agent will not be able to take part in chat.

Note:

If you wish to use your custom API. You can see Below link for detailed Documentation.

[WhatsApp API](#)

