

Whatsapp Business Account Prerequisites and Guidelines

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ABOUT YELLOW MESSENGER:

Yellow Messenger (Product completely owned by Bitonic Technology Labs Pvt Ltd) is an Artificial intelligence powered leading Chatbot platform for enterprises and brands to create, deploy and manage Intelligent Chatbots across various platforms to engage with their Customers. Yellow Messenger closely works with Enterprises to evangelize their requirements, work with them to create customized chatbots for their specific needs using the yellow messenger chatbot platform.

Yellow Messenger is backed by Microsoft Accelerator and a Microsoft Partner for Intelligent Chatbots.

WhatsApp BM Account Linking Process

Businesses need to have their own Facebook Business Manager Account so that YM can request for a WhatsApp Manager Account on Customer's behalf.

To make a Business Manager Account on Customer's behalf YM need to provide some Customer details to FB by which a request will be raised to FB for the same. The details are as follows:

Prerequisites Table

Sno.	Pre-requisites	Comment
1.	Facebook Business Manager ID	Priority Requirement as verification takes time from WhatsApp's end. If you don't have an FB BM Account then please follow the guide in the Appendix.
2.	Whatsapp Number	The phone number should not be linked to a previous Whatsapp Account as this number will be used to create a new Whatsapp Account.
3.	About Message (Whatsapp Status)	Max 130 Characters
4.	Logo 1:1 aspect ratio	Will be used as Whatsapp DP
5.	Business Address	Max 250 Characters

6.	Business Description	Max 250 Characters
7.	Business Category	
8.	Contact Email	
9.	Website URL	You can give multiple URLs
10.	Whatsapp Account Display Name	To be displayed to the end-user. Note this cannot be changed later and must follow <u>Display Name Guidelines</u>

Please send the above 10 details to YM for Whatsapp Account Creation. Also read the below for further details about the process.

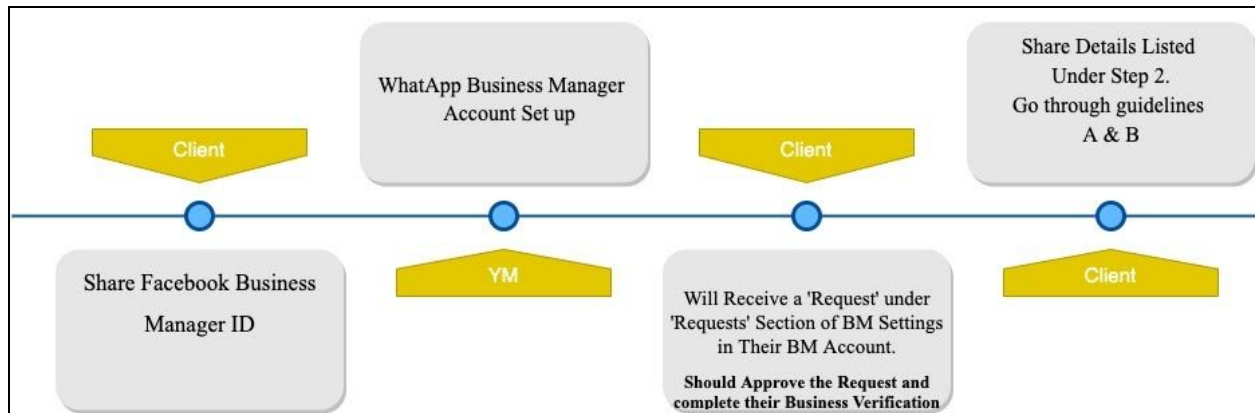
Whatsapp Account Set-up Steps

Whatsapp account set up requires facebook business manager account. Facebook Business Manager is a free tool developed by Facebook to allow businesses and agencies to securely manage their company's Pages, ad accounts, WhatsApp Accounts, catalogs and pixels in one place, without sharing login information or being connected to their coworkers on Facebook.

YM will create the Whatsapp Business Account on behalf of the Brand. Following this procedure :

1. Share the Business Manager ID with YM. Refer to **Appendix B** on how to get the BM ID.
2. If you don't have a facebook business account, then please follow the **Appendix A** to create a business manager account and then the **Appendix B** to get the BM ID and share it with YM.
3. YM will initiate the process of creating the WhatsApp Business Account on behalf of the Customer and the customer will receive a Request on the `Requests` section of their BM Account.
4. Login to BM Account (business.facebook.com) > Business Settings > Requests located in the BM Settings on the left pane > Approve the request from Yellow Messenger(Bitonic Technology Labs)
5. Upon accepting the request Customer has to go to the Business Settings>Security Centre and complete the Business Verification Process to move forward to the next step.

6. YM will trigger an OTP to the phone number shared for Linking the WhatsApp Business Account and the OTP should be shared with YM to finish the verification.(Need to be done within 10mins after triggering OTP).
7. Once the Business verification is completed YM can start adding the phone number and templates and send it to Facebook for approvals.



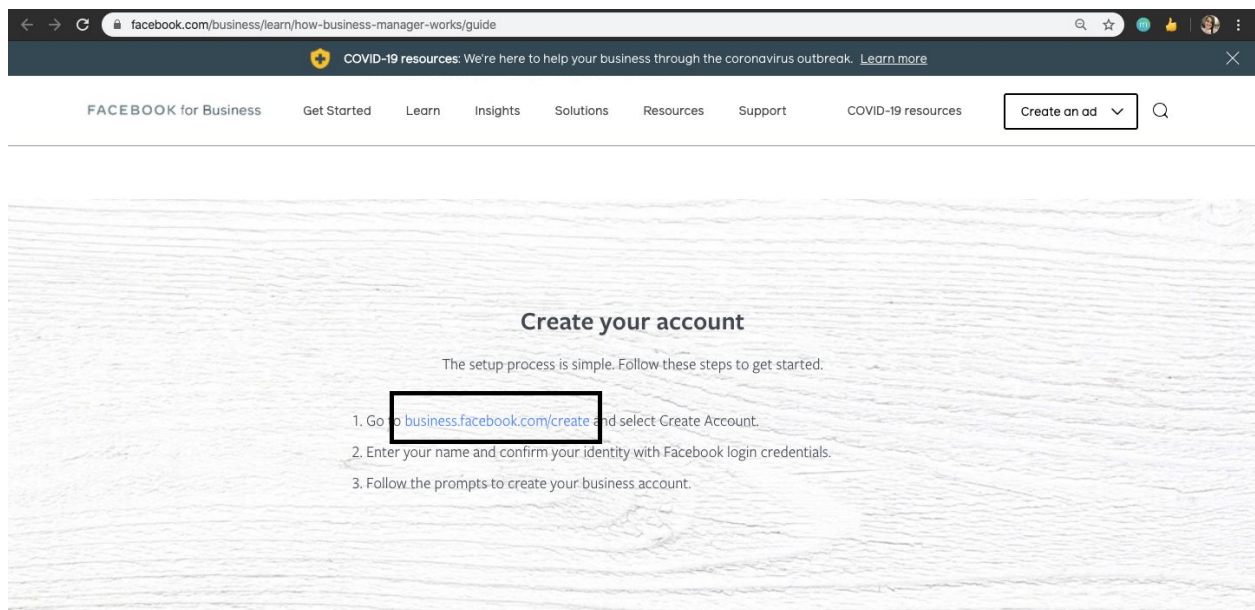
Please go through the [Whatsapp Commerce Policy](#), which restricts some Businesses to sell/promote specific products through WhatsApp.

To get Official Business Account Status, YM will send a request to Facebook on behalf of the customer and once approved by Facebook the WhatsApp no. will be marked as an Official Business Account with a green tick and the Official Naming of the WhatsApp Account. (**Note:** It is not mandatory that all Businesses will get an Official Business Account from Facebook. Facebook holds the right to give the Official Account Status to Businesses.)

Appendix A : How to Create FB BM Account

Steps to create a Facebook Business Account :

1. Visit the facebook business manager guidelines page here - [Link to Facebook Business Manager Guide](#)



2. Go through the guidelines if you want to understand how it works.
3. Click on business.facebook.com/create on the page shown above. [Link to Create Your Account](#)



4. Click on 'Create Account' at the top right corner of the page.
5. You might need to login to your personal account first.

You must log in to continue.

Log in to Facebook

You must log in to continue.

Email address or phone number

Password

Log In

Forgotten account?

or

Create New Account

6. The click on 'Create Business'

Create your Business Manager account

Your business and account name

Jasper's Market

This should match the public name of your business as it will be visible across Facebook. It can't contain special characters.

Your name

Apoorva Shrivastava

Your business email address

This should be an email address that you use to conduct company business. We'll send an email to verify it. You'll also receive communications regarding your business account at this email address.

When you add others to your business, your Facebook name, profile picture and user ID from Facebook will be visible to them.

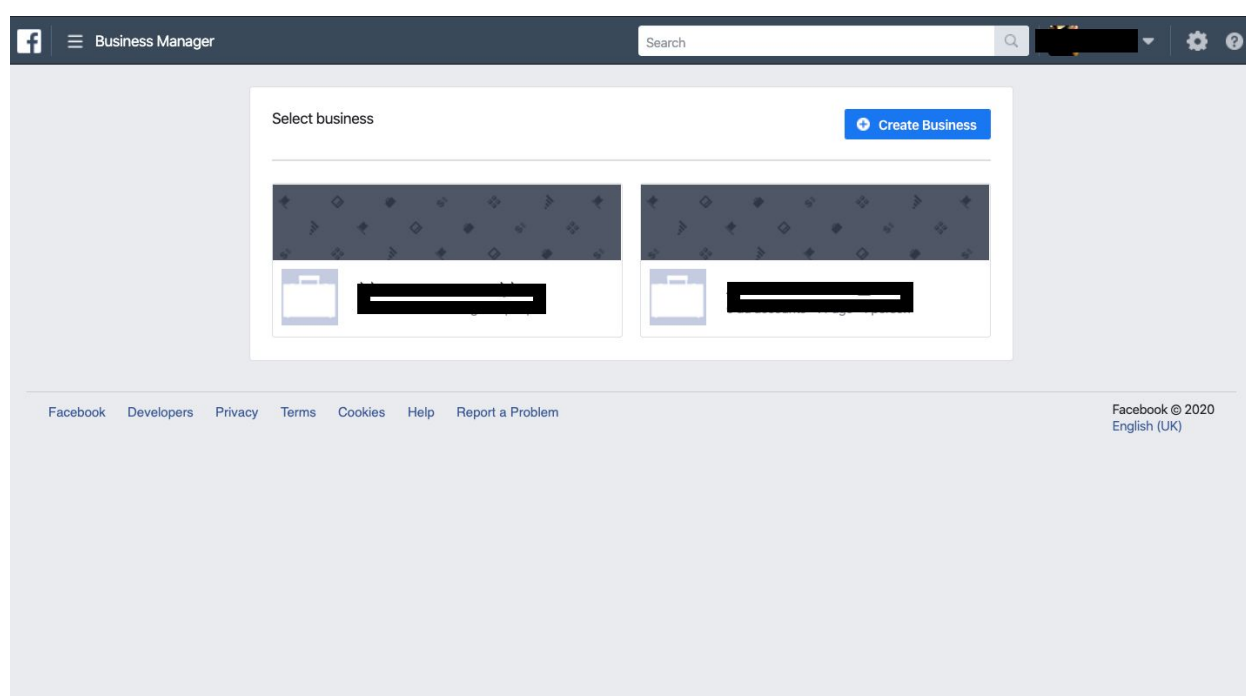
Next

7. Enter your Business Details on this page and you're all set!

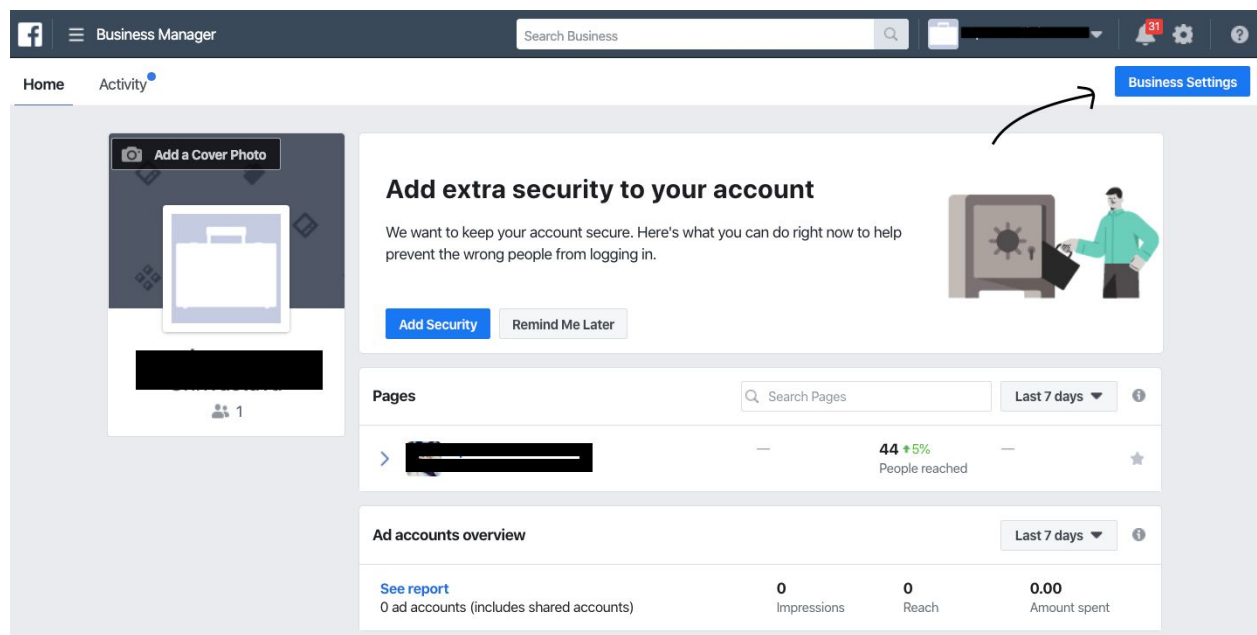
Appendix B : Where to find FB BM ID

Steps to get your Facebook Business Manager Account ID.

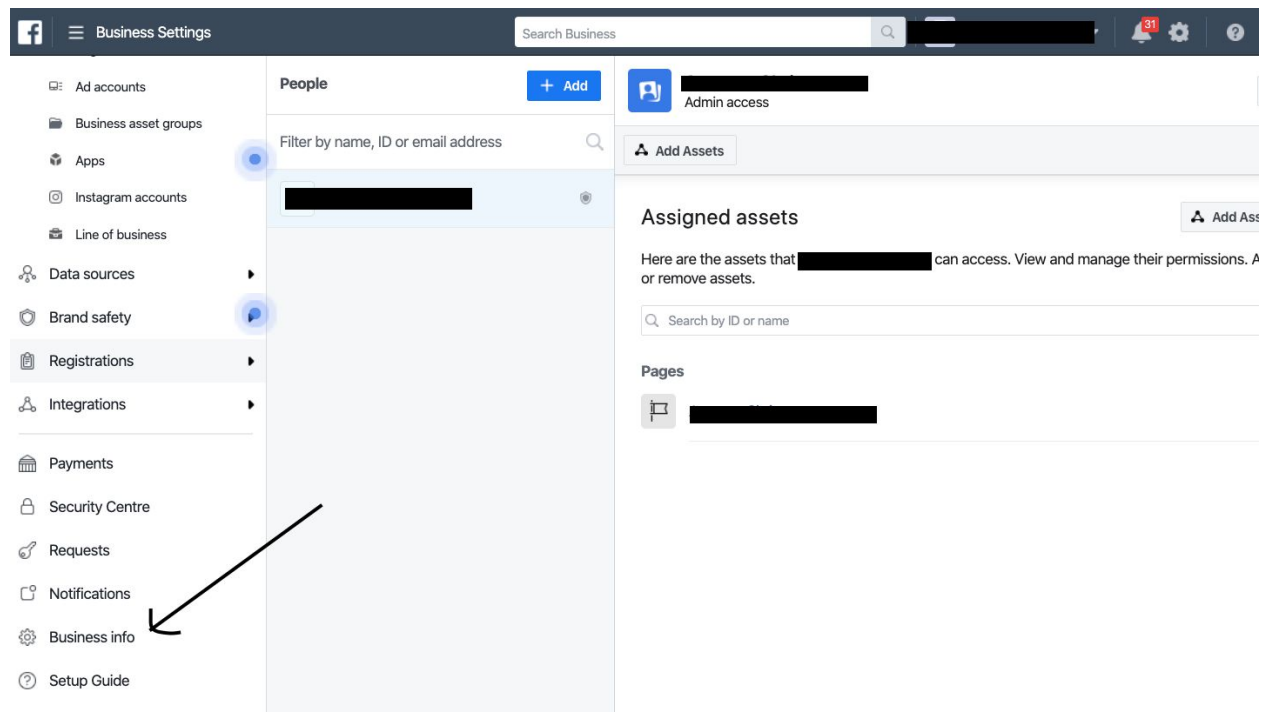
1. Login to your business account - <https://business.facebook.com/>
2. Select the business -



3. Go to Business Settings



4. Then go to the bottom left corner of the page as shown below



5. Click on 'Business Info', you'll find your FB BM Account ID there as shown below. In this case the

Business Manager ID is 305157200424636.

6. Note : Business Verification Status should be verified!

The screenshot shows the Facebook Business Settings interface. On the left is a sidebar with various settings categories. The main area is titled 'Business Manager info' and displays the Business Manager ID: 305157200424636. Below this, the 'Business details' section shows the 'Business verification status' as 'Unverified'. A curved arrow points from the 'Unverified' status to the 'Business Manager ID' field. The 'Business details' section also lists other information: Legal name of business (No name), Address (No address), Business phone number (No phone number), Website (No website), and Tax ID (No tax ID). The 'Business options' section is visible at the bottom.

Business Manager info

Business Manager ID: 305157200424636
Primary Page: None

Business details

Business verification status: **Unverified**
Help increase transparency between businesses and people on Facebook by verifying your business. If your business needs to access certain Facebook products, it must be verified.

Legal name of business: No name
Address: No address
Business phone number: No phone number
Website: No website
Tax ID: No tax ID

Business options

Appendix C : Important Guidelines and ETA's

The first step for businesses to communicate with customers on WhatsApp is to create a Business Profile. WhatsApp will create a unique entry for your business with relevant information that will be visible to customers that are communicating with you.

YM will create the Whatsapp Business Account on behalf of the Brand. Following are some of the important guidelines to be followed during the setup.

A. For Two way communication

Two way communication, when the user initiates the conversation.

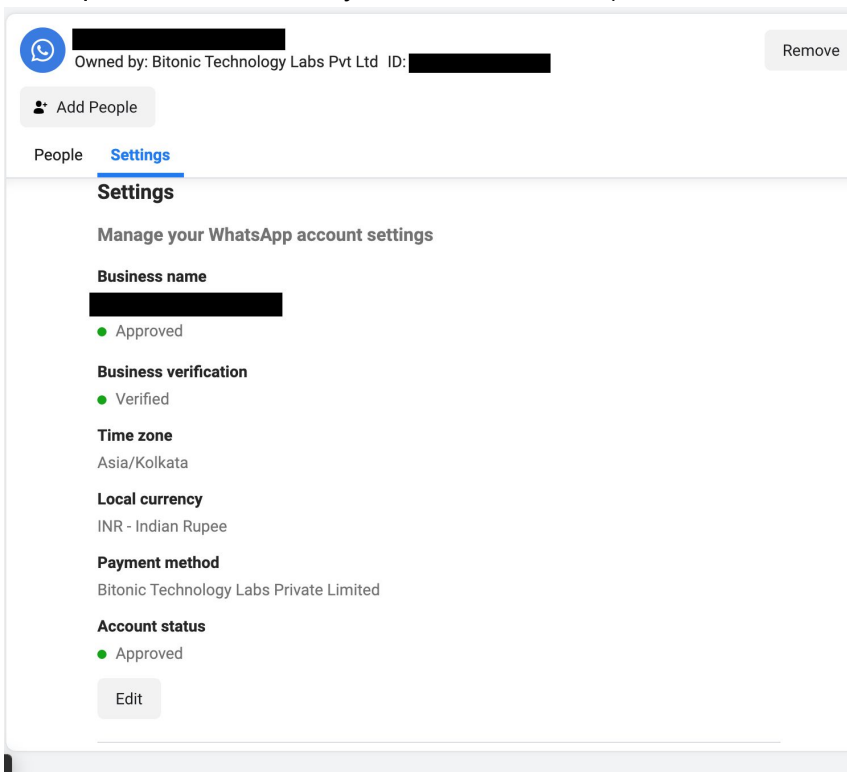
1. Accept Whatsapp Account Creation Request on FB Business Account | ETA on Brand

Once the FB BM ID is received by us, YM will initiate the process of creating the WhatsApp Business Account on behalf of the Customer and the customer will receive a Request on the `Requests` section of their BM Account.

Login to BM Account (business.facebook.com) > Business Settings > Requests located in the BM Settings on the left pane > Approve the request from Bitonic Technology Lab.

2. Business Verification | ETA depends on Brand and Facebook

Upon accepting the request Customer has to go to the Business Settings>Security Centre and complete the Business Verification Process to move forward to the next step. ETA depends on client and facebook (not required if client already has the verification)

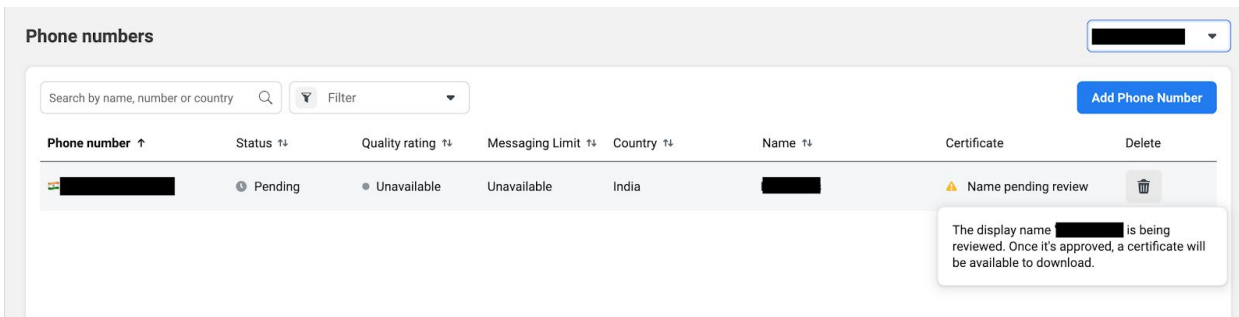


3. Account Status | ETA depends on Whatsapp(24hrs Generally)

Account status has to be approved. If not approved then the brand/YM can raise a request for the same to FB for escalating the process. Please refer to the above screenshot.

4. Whatsapp Display Name | ETA 24-48 hrs

The display name for your whatsapp account. When you add a new phone number to your WhatsApp account in the Facebook Business Manager, you assign it a display name. The display name is required to create a certificate, without which the WhatsApp Business API client will not work. There are certain guidelines and formats that the name should follow. Please go through the details [here](#) to make sure that the name you're choosing for your account is correct and will not get rejected from facebook/ whatsapp.



For example :

Accepted: ABC Wine Glasses

Not accepted: ABC Wine

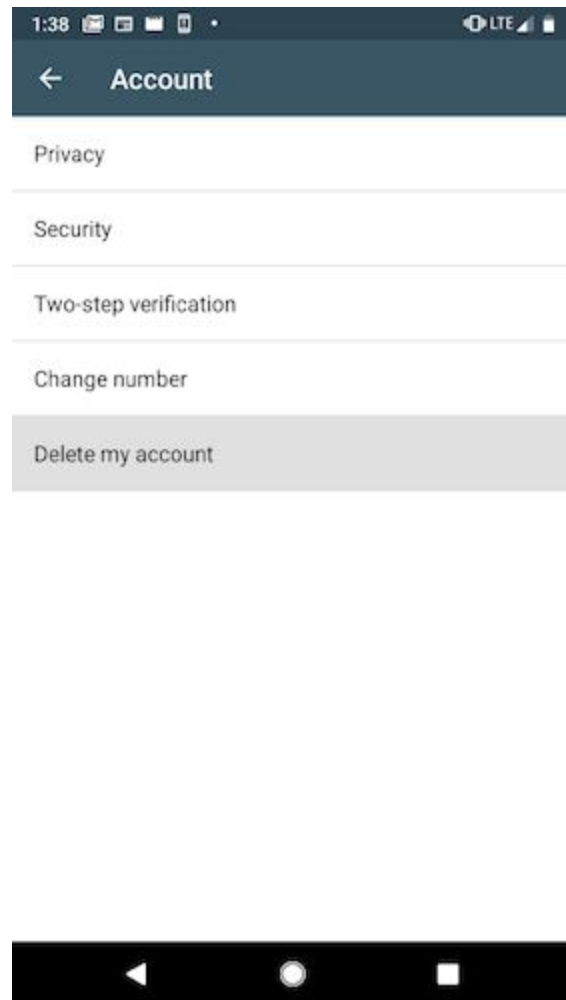
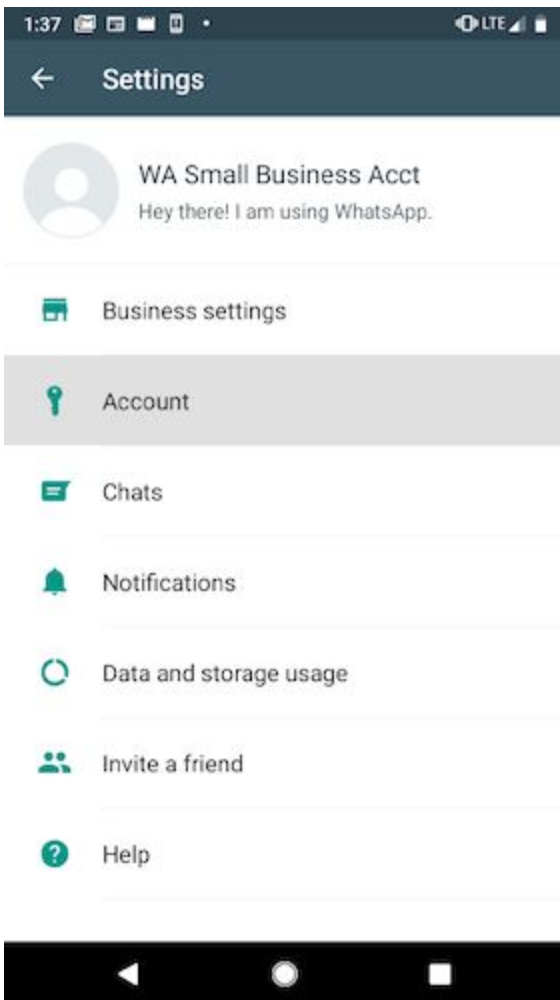
Accepted: New City Computers

Not accepted: NEW CITY COMPUTERS

Please find more examples like above [here](#)

5. Whatsapp Phone Number | ETA on Brand

A phone number has to be provided to us to link it with the Whatsapp account. The phone should not be already used as a whatsapp number. If a Whatsapp account is already created with that number then the account has to be deleted following these steps, link [here](#).



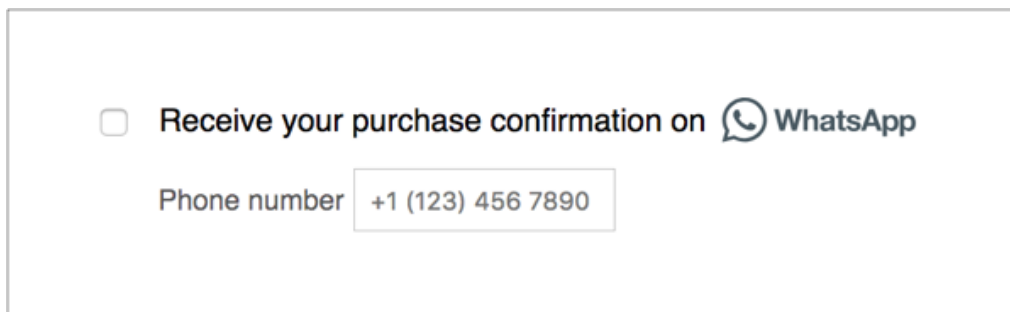
6. Whatsapp Legal Info


You can't sell everything on whatsapp. You can't sell Alcohol, medicines or drugs, guns, etc. Please go through this link [here](#) and make sure any transactions happening via WhatsApp are legal and allowed by Whatsapp.

B. For One Way Communication (Push Notifications)

1. Opt-in for push notifications

You should not send push notifications without customers consent for receiving updates on WhatsApp for your service. If you still send the push notification to users without getting their consent WhatsApp can take action on the same. In both cases Whatsapp can either contact you to show them the flow for getting consent or directly block the business account. So make sure that you follow the guidelines mentioned [here](#) to get customer opt-in.

A screenshot of a WhatsApp opt-in form. It features a checkbox followed by the text "Receive your purchase confirmation on" and the WhatsApp logo with the word "WhatsApp". Below this, there is a label "Phone number" and a text input field containing the number "+1 (123) 456 7890".

☐ Receive your purchase confirmation on  WhatsApp

Phone number

2. Notification Templates | ETA on Whatsapp upto 24hrs

The push notifications to be sent will have to be approved by whatsapp. Marketing or promotional templates will be rejected, abusive or threatening templates are not allowed. Even if the template has spelling mistakes, it will be rejected. For more details visit [here](#).