

WhatsApp Business Account Set Up with Meta Developer

Overview:

This document provides a detailed step-by-step guide for setting up a WhatsApp Business account using the Meta for Developers platform.

1. Prerequisites

You must have an active Facebook account that includes both an email address and a phone number.

Log in to Facebook in your browser before performing any of the steps below.

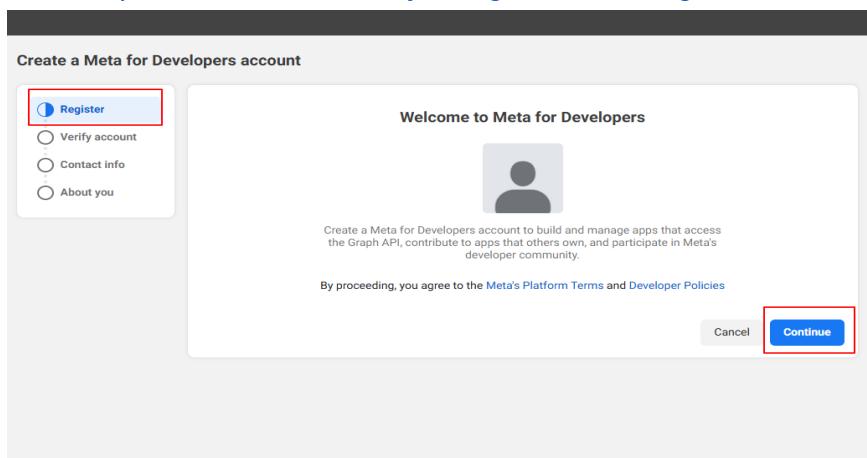
All subsequent operations require you to remain logged in to your Facebook account in the same browser.

2. Register as a Meta Developer

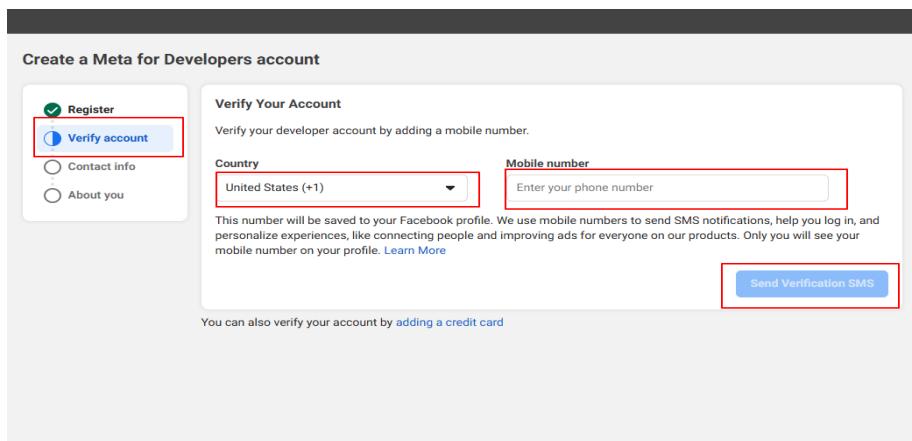
While logged into Facebook, visit the following registration link:

Meta Developer Registration:

<https://developers.facebook.com/async/registration/dialog/?src=default>



Enter your country code and mobile number. verify it using the OTP sent to your device.



Create a Meta for Developers account

Register
 Verify account
 Contact info
 About you

Continue by entering verification code
Let us know this mobile number belongs to you by entering the 6-digit code sent to 073... (India).

650011

Send SMS Again

Update Mobile Number

Enter your email address (associated with your Facebook account) and verify it using OTP.

Create a Meta for Developers account

Register
 Verify account
 Contact info
 About you

Enter the Code from Your Email
Let us know this email belongs to you. Enter the code in the email sent to you...@facebook.com

36028

Send Email Again

Update Email

Select the appropriate “Who you are” option.

Create a Meta for Developers account

Register
 Verify account
 Contact info
 About you

Which of the following best describes you?
Help us improve your experience by telling us which of the following roles best describe you.

Developer
 Marketer
 Analyst
 Product manager
 Student
 Owner/founder
 Other

Complete the registration process.

Once complete, you'll be redirected to the Create App page. You may proceed or exit.

OO Meta

Docs Tools Support Apps Required actions

Apps

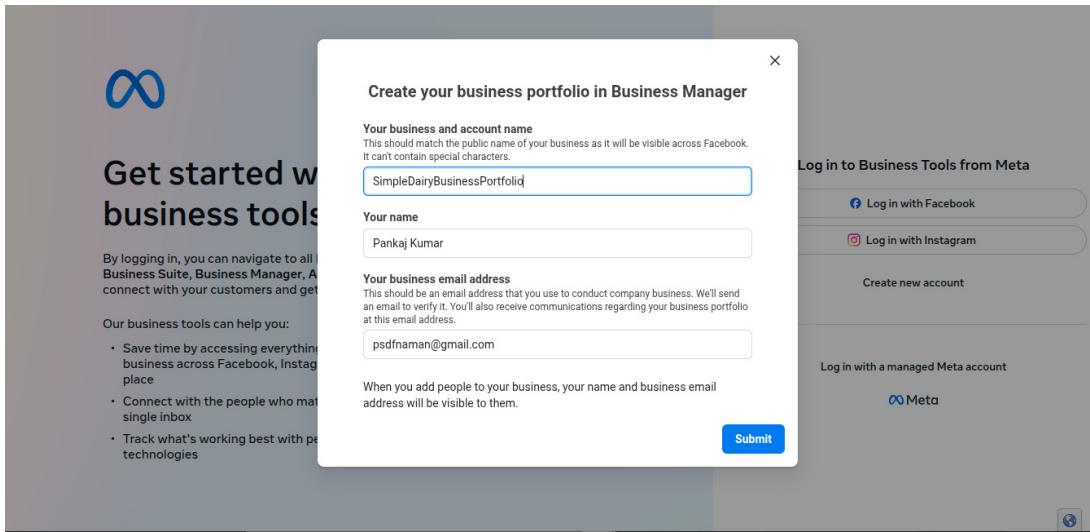
Filter by
 All Apps
 Archived
 Required actions

Business portfolio
No business portfolio selected

No apps yet
To get started, create your first app.

3.Create a Meta Business Portfolio

Go to Meta Business Suite: <https://business.facebook.com/>



Verify your email if prompted, to gain full access.

This portfolio will act as your Meta Business Account — a container to manage:

Users and system users

Connected apps

Assets such as WhatsApp accounts and catalogs

On completion, you will be redirected to the business portfolio page.

Note:

A single Business Portfolio can contain(linked to) multiple apps.

One app can be linked to multiple WABA of the same business portfolio.

A screenshot of the Meta Business Suite Home page for the user 'Simpledairybu...'. The sidebar includes links for Home, Notifications, Ads Manager, Inbox, Content, Creator marketplace, Ads, Insights, Search, Settings, and Help. The main content area shows a message 'Good afternoon, Dileep' and an 'Ad account performance' section with a 'No ad accounts' message and a 'Go to Business settings' button. An 'Alerts' sidebar indicates 'No new alerts.' and a 'See all alerts' button.

4. Create Your App

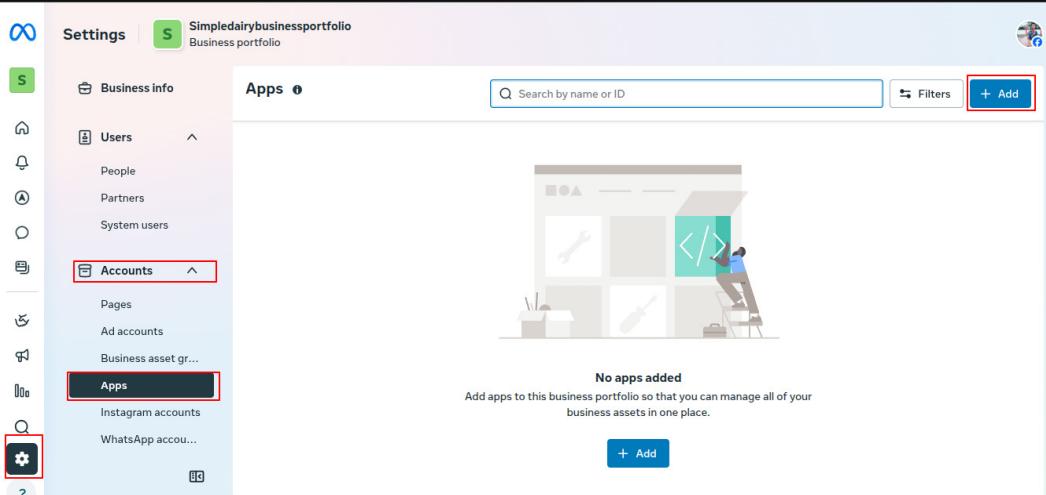
You can create the app either via the Developer Portal or Business Suite.

Option 1: Developer Portal :

Visit: <https://developers.facebook.com/apps/>

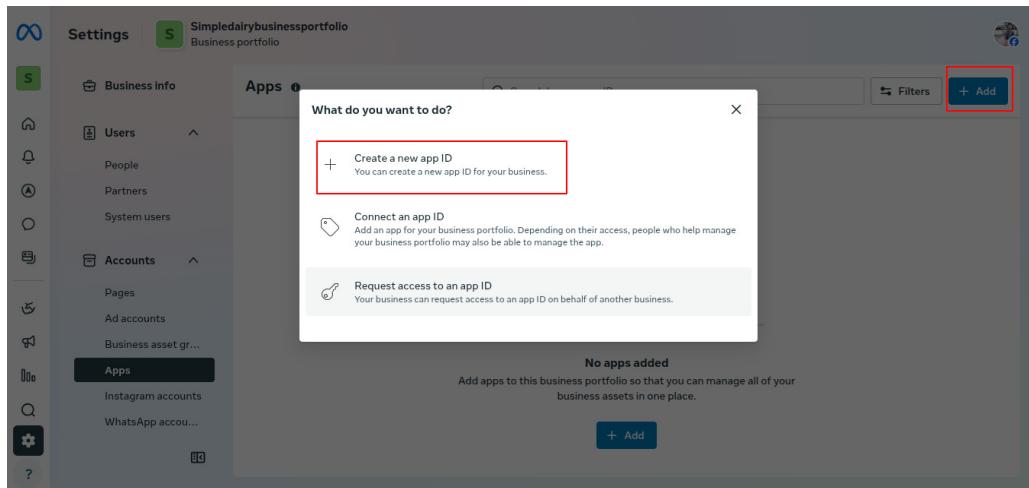
Option 2 (Recommended): Business Suite

Go to <https://business.facebook.com/>



Click on the **Settings** icon in the left sidebar.

Under Accounts, select Apps, Click “Add” and then click “Create New App ID”.



Enter your app details.

Create an app

App details

App name
This is the app name that will show on your My Apps page and associated with your app ID. You can change the name later in Settings.
 14/30

App contact email
This is the email address we'll use to contact you about your app. Make sure it is an address you check regularly. We may contact you about policies, app restrictions or recovery if your app is deleted or compromised.

Cancel **Next**

Use Case: Select “Other”
App Type: Choose “Business”

Create an app

Use cases

Add use cases

Filter by

- Featured (4)
- All (13)
- Ads and monetization (3)
- Content management (4)
- Others (5)

Authenticate and request data from users with Facebook Login
Our most common use case. A secure, fast way for users to log into your app or game and for the app to ask for permissions to access their data to personalize their experience. [About Facebook Login](#)

Allow users to transfer their data to other apps
Give users the ability to transfer their information from Meta apps to other services. [About data portability apps](#)

Share or create fundraisers on Facebook and Instagram
Raise money and reach more people with Meta's Fundraiser API. Create or share existing fundraising campaigns on Facebook and Instagram. [About the Fundraiser API](#)

Join ThreatExchange
Join ThreatExchange to share signals with other members about online threats, including terrorism, malware, CSAM, and other harmful content, to help keep people safe on the internet. [About ThreatExchange](#)

Create an app without a use case
Select this option if you'd like to get an app ID without adding any permissions, features or products.

Looking for something else?
If you need a use case that isn't on the list, select an App Type and add the permissions and products you need.

Other
Your app will be created in the old experience. Then, you'll choose from all available permissions, features and products.

Cancel **1 use case added** **Previous** **Next**

Meta Docs Tools Support Apps Required actions Search

Create an app

Type

Select an app type
The app type can't be changed after your app is created. [Learn more](#)

Business
Create or manage business assets such as Pages, Events, Groups, Ads, Messenger, WhatsApp and Instagram using the available business permissions, features and products.

Consumer
Connect consumer products and permissions, like Facebook Login to your app.

Cancel **Next**

Rate your experience
Good Bad

Verify the app details and click Create App.

The screenshot shows the 'Create an app' form on the Meta (Facebook) developer portal. The 'Type' tab is selected, showing fields for 'App name' (SimpleDairyApp), 'App contact email' (psdfnaman@gmail.com), and 'Business portfolio' (Simpledairybusinessportfolio). A note states that connecting a business portfolio is optional. Below these fields is a checkbox for accepting the 'Meta Platform Terms and Developer Policies'. At the bottom right are 'Cancel', 'Previous', and 'Create app' buttons. A feedback section on the right asks for experience rating (Good or Bad).

Enter your Facebook password when prompted.

Once created, you will be redirected to your App Dashboard.

Example URL:

https://developers.facebook.com/apps/your_app_id_here/add/?business_id=your_business_id_here

The screenshot shows the Facebook App Dashboard for the app 'SimpleDairyApp'. The top navigation bar includes 'Docs', 'Tools', 'Support', 'Apps', 'Required actions', and a search bar. The dashboard header displays 'App ID: 15133', 'App Mode: Development (Live)', and 'App type: Business'. On the left, a sidebar lists 'Dashboard', 'Required actions', 'App settings', 'App roles', 'Alerts', and 'App Review'. Under 'App Review', there are sections for 'Products' (with an 'Add Product' button) and 'Activity log'. The main content area features a grid of six cards for integrating with other products: Messenger, Instagram, WhatsApp, Marketing API, App Events, and Audience Network. Each card has a 'Read docs' and 'Set up' button.

5.Add Products to Your App (WhatsApp)

Step 1: Add the WhatsApp product

On your App Dashboard, scroll to the “Add Products to Your App” section. Under WhatsApp Card, click Set Up.

The screenshot shows the Meta App Dashboard for a simple dairy app. On the left, there's a sidebar with various settings like Dashboard, Required actions, App settings, App roles, Alerts, App Review, Products, Activity log, and Activity log. The 'Products' section has an 'Add Product' button. In the main area, there's a section titled 'Add products to your app' with a sub-section for 'WhatsApp'. The WhatsApp card is highlighted with a red box and a red arrow pointing to the 'Set up' button. Other cards shown include Messenger, Instagram, Marketing API, App Events, and Audience Network. At the top, it says 'App Mode: Development' and 'Live'.

Select your Business Portfolio and click Continue.

The screenshot shows the App Dashboard for a simple dairy app. The sidebar includes 'Dashboard', 'Required actions', 'App settings', 'App roles', 'Alerts', 'App Review', 'Products' (with 'Add Product' button), 'Webhooks', and 'WhatsApp' (with 'Quickstart', 'API Setup', and 'Configuration' tabs). A modal window is open for 'WhatsApp Business Platform' setup, showing fields for selecting a business portfolio ('Simpledairybusinessportfolio') and agreeing to terms. It also mentions receiving a WhatsApp test phone number and reviewing government and political use restrictions. A 'Continue' button is at the bottom of the modal.

You'll be redirected to the WhatsApp Business Quickstart page, e.g.:

https://developers.facebook.com/apps/<app_id>/whatsapp-business/wa-dev-quickstart/?business_id=<business_id>

The screenshot shows the WhatsApp Business Quickstart page. The sidebar includes 'Dashboard', 'Required actions', 'App settings', 'App roles', 'Alerts', 'App Review', 'Products' (with 'Add Product' button), 'Webhooks', and 'WhatsApp' (with 'Quickstart', 'API Setup', and 'Configuration' tabs). The main content area has a 'Quickstart' section with a 'Welcome to the WhatsApp Business Platform' card (mentioning API Setup and Start using the API) and a 'Scale your business' section with 'Become a Tech Provider' and 'Improve ROI with marketing messages with optimizations' cards.

Step 2: Generate a webhook verification token

On the WhatsApp Business Quickstart page, Click Start Using API.

The screenshot shows the WhatsApp Business Quickstart page in the App Dashboard. The left sidebar has a 'WhatsApp' section with 'Quickstart' selected. The main area displays the 'Quickstart' section with a 'Welcome to the WhatsApp Business Platform' message and an 'API Setup' box containing the text: 'Get set up on the Cloud API by adding a phone number and sending your first message.' A red arrow points to the 'Start using the API' button, which is highlighted with a red border. The top navigation bar shows 'App ID: 151' and 'App Mode: Development (Live)'. The sidebar also includes sections for Dashboard, Required actions, App settings, App roles, Alerts, App Review, Products, Webhooks, and Configuration.

Click Generate Access Token.

The screenshot shows the API Setup page in the App Dashboard. The left sidebar has a 'WhatsApp' section with 'API Setup' selected. The main area displays the 'Access Token' section, which says: 'Clicking Generate access token will allow you to select one or more WhatsApp Business accounts to generate temporary tokens for.' Below this is a 'Send and receive messages' section with 'Step 1: Select phone numbers' and a 'From' field containing 'Test number: +1 5'. There are also fields for 'Phone number ID: 866' and 'WhatsApp Business Account ID: 13'. The 'To' field is labeled 'Select a recipient phone number'. At the bottom, there is a 'Step 2: Send messages with the API' section with the text: 'You can send a test message by clicking **Send message**, or by copying this command, pasting it into Terminal, and pressing enter. If you want to...'. The top navigation bar shows 'App ID: 1513' and 'App Mode: Development (Live)'. The sidebar also includes sections for Dashboard, Required actions, App settings, App roles, Alerts, App Review, Products, Webhooks, and Configuration.

When generating for the first time you have to select the facebook account.
Select the Test WhatsApp Business Account.

The screenshots show the Facebook App Dashboard interface. In the top-left screenshot, a confirmation dialog asks "Continue as Dileep Patidar?" with options "Not now" and "Continue as Dileep Patidar". In the middle screenshot, under "Step 2", the user is prompted to "Choose the WhatsApp accounts you want SimpleDairyApp to access" and selects "Test WhatsApp Business Account". In the bottom-right screenshot, the generated access token is displayed in a modal window with a "Copy" button.

The screenshots show the Facebook App Dashboard interface. In the top-left screenshot, the "Test WhatsApp Business Account" is selected in a list of accounts. In the middle screenshot, under "Step 2", the user is prompted to "Choose the WhatsApp accounts you want SimpleDairyApp to access" and has selected "Test WhatsApp Business Account". In the bottom-right screenshot, the generated access token is displayed in a modal window with a "Copy" button.

Click continue and then save. **Copy the token** for the webhook verification process.

The screenshot shows the WhatsApp API Setup page. It displays a generated access token: "EAU5YcWjogUBPyAamvz7uTjBo3zsyzqK00ilsX2FR1u4noPHGnNJTE2l0j3fcYKhpu01MsRw1". A red box highlights the "Copy" button next to the token.

This token is temporary. You can regenerate it anytime from:
<https://developers.facebook.com/apps/> Click on app, In left side bar, under whatapp click "API setup" , now you can generate the new token.

Step 3: Verify Connection

You'll be assigned a test phone number automatically.

Add a recipient phone number under the section "To" - Manage Phone Number List.

The screenshot shows the WhatsApp Business API setup interface. On the left sidebar, under the 'WhatsApp' section, 'API Setup' is selected. In the main area, the 'Send and receive messages' configuration is displayed. It shows a 'From' field set to '+1 51' and a 'Phone number ID' field set to '866'. Below these fields is a 'To' field labeled 'Select a recipient phone number'. A note below the 'To' field states: 'By continuing, you are giving consent to receive messages at this phone number.' At the bottom of the configuration panel, there is a terminal command example:

```
curl -i -X POST 'https://graph.facebook.com/v22.0/{REDACTED}/messages'
  | 'Authorization: Bearer {REDACTED}'
```

Below this, another terminal command example is shown:

```
curl -i -X POST 'https://graph.facebook.com/v22.0/{REDACTED}/messages'
  | 'Authorization: Bearer {REDACTED}'
```

A modal window titled 'Add a recipient phone number' is open over the configuration panel. It contains a 'From' dropdown set to 'IN +91' and a 'Phone number' input field containing '9155'. A 'Next' button is visible at the bottom right of the modal.

Enter the OTP sent to that recipient's mobile number.

Click Send Message to send a test "Hello World" message via WhatsApp.

Later, you can replace this with your actual business number.

The screenshot shows the 'Send messages with the API' configuration page. The 'Step 2: Send messages with the API' section is active. It contains a note: 'You can send a test message by clicking **Send message**, or by copying this command, pasting it into Terminal, and pressing enter. If you want to create a new test message, you can [create your own template](#) from WhatsApp Manager. [About message templates](#)'.

Below the note is a terminal command example:

```
curl -i -X POST 'https://graph.facebook.com/v22.0/{REDACTED}/messages'
  | 'Authorization: Bearer {REDACTED}'
```

At the bottom of the configuration panel, there is a 'Run in Postman' button and a 'Send message' button.

Below the configuration panel, other steps are listed:

- Step 3: Configure webhooks to receive messages**: Create a custom webhook URL or use services that help you set up an endpoint. A 'Configure webhooks' button is present.
- Step 4: Learn about the API and build your app**: Review the developer documentation to learn how to build your app and start sending messages. A 'See documentation' button is present.

6. Configure and verifying Webhook Callback

Important Note:

Before proceeding, ensure that you have created a **Tenant associated with milkman**, a **Phone Number** record associated with Tenant in your database.

This record must contain the credentials necessary for webhook verification.

For the webhook verification step to succeed, your database must already have a Tenant record with the following attributes:

milkman_id

name (required) - Tenant / Business Name

access_token (required) - System user Access Token

webhook_verify_token (required) - Webhook Verification Token

app_secret (required) - App Secret

waba_id (optional) - WhatsApp Business Account ID

Phone number record with: tenant_id (reference), phone_number_id: (string), status

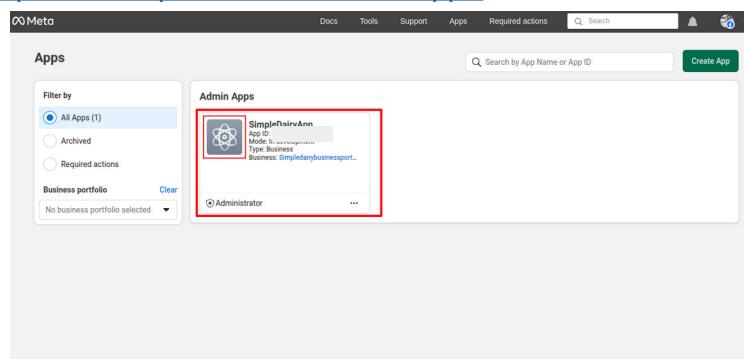
In **SimpleDairy admin dashboard**, To create records, Visit:

<http://localhost:3000/456b7016a91/tenant/new?locale=en>

To learn how to retrieve these credentials, see the section “*How to Retrieve Credentials*” below.

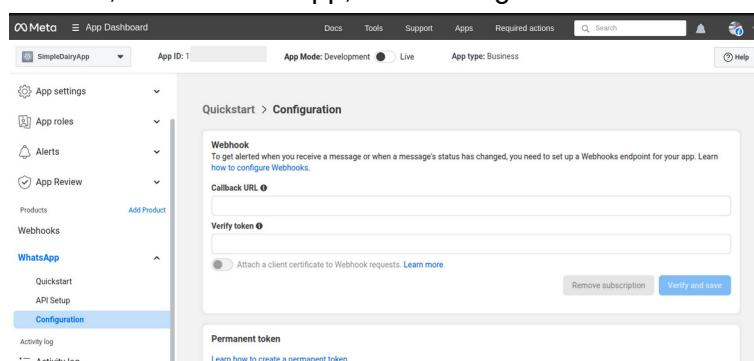
Now, moving further, ensure you have a valid webhook verification Token.

Visit <https://developers.facebook.com/apps/>



Click on your app.

In the left sidebar, under WhatsApp, click Configuration.



Enter your Webhook endpoint URL and token and click “verify and save”.

You'll receive a GET request from Meta at your endpoint for verification.

```
Started GET "/api/v1/webhook?hub.mode=subscribe&hub.challenge=1336348051&hub.verify_token=[FILTERED]" for 2a03:2880:24ff:42:: at 2025-1-04 17:50:04 +0530
Cannot render console from 2a03:2880:24ff:42::! Allowed networks: 127.0.0.0/127.255.255.255, ::1
  ActiveRecord::SchemaMigration Load (0.3ms)  SELECT "schema_migrations"."version" FROM "schema_migrations" ORDER BY "schema_migrations"."version" ASC /*application='ChatbotRails'*/
Processing by Api::V1::WebhooksController#verify as */
  Parameters: {"hub.mode"=>"subscribe", "hub.challenge"=>"1336348051", "hub.verify_token"=>"[FILTERED]"}
  Tenant Load (0.5ms)  SELECT "tenants".* FROM "tenants" WHERE "tenants"."webhook_verify_token" = '{"p": "T0U35rXaR+3U/W0YnUuT9XQVc4o4oBft0/gc7VgfCRA8BBTYuo8Eig2hyj0WgP0m6+JozLxeKipXpxwLfdIc3wlZ+BaPIebaP3z7rVghMm9BeSbzKzMX8THDn+LNEYzjmg6wX8D0bpS0QzaXZ0nk0DI2XfhUoA1Ww1fkURXBX1H [REDACTED]/*action='verify',application='ChatbotRails',controller='webhooks'*/
    ↳ app/services/whatsapp/webhook_verification_service.rb:9:in `call'
    Rendering text template
    Rendered text template (Duration: 0.0ms | GC: 0.0ms)
Completed 200 OK in 62ms (Views: 1.4ms | ActiveRecord: 5.0ms (1 query, 0 cached) | GC: 0.0ms)
```

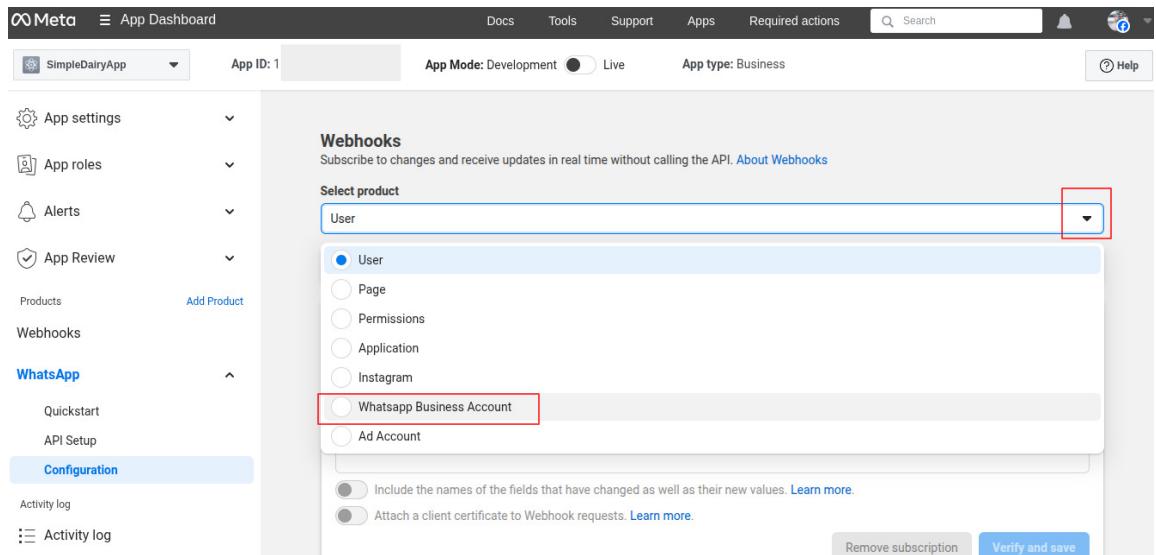
Development Tip: Use ngrok for local webhook testing and verification.

After verification:

***Subscribe to required Webhook fields (e.g., messages, templates).**

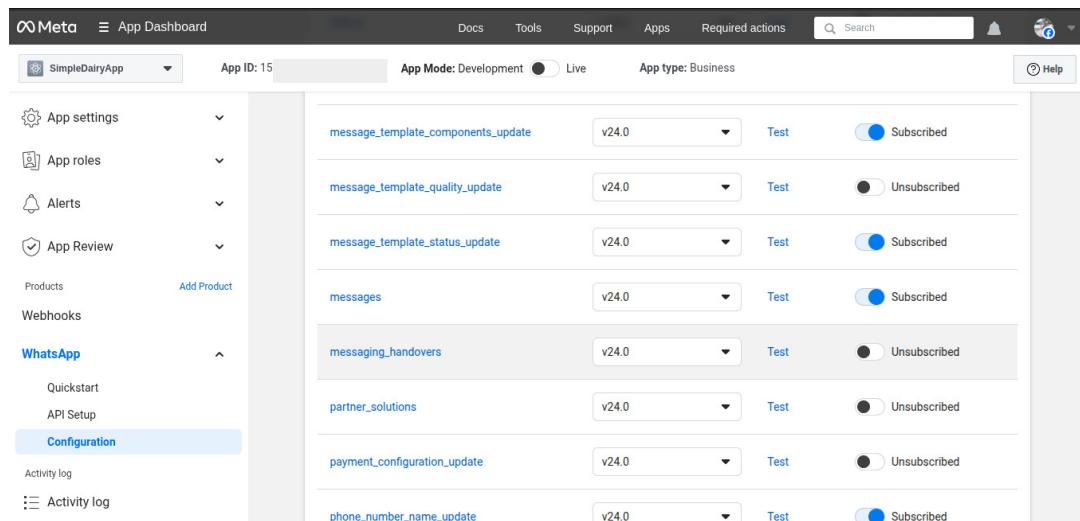
After successful verification, you will be redirected to the “webhook” dashboard.

From the “Select product” dropdown, choose “Whatsapp Business Account”



The screenshot shows the Meta App Dashboard interface. On the left, there's a sidebar with various settings like App settings, App roles, Alerts, App Review, Products, Webhooks, WhatsApp (which is expanded), and Configuration. Under Configuration, there are Quickstart, API Setup, Activity log, and Activity log. The main area is titled "Webhooks" and says "Subscribe to changes and receive updates in real time without calling the API. [About Webhooks](#)". It has a "Select product" dropdown menu open, showing "User" (selected) and "WhatsApp Business Account" (highlighted with a red box). Other options in the dropdown include Page, Permissions, Application, Instagram, and Ad Account. At the bottom of the dropdown, there are two checkboxes: "Include the names of the fields that have changed as well as their new values. [Learn more](#)." and "Attach a client certificate to Webhook requests. [Learn more](#).". There are also "Remove subscription" and "Verify and save" buttons.

Scroll down to see the webhook fields.



The screenshot shows the same Meta App Dashboard interface as the previous one, but now the "Configuration" section is expanded. It lists several webhook fields: "message_template_components_update", "message_template_quality_update", "message_template_status_update", "messages", "messaging_handovers", "partner_solutions", "payment_configuration_update", and "phone_number_name_update". Each field has a dropdown menu for version (set to v24.0), a "Test" button, and a subscribe/unsubscribe toggle switch. The first four fields ("message_template_components_update", "message_template_status_update", "messages", and "messaging_handovers") have their subscribe toggles turned on (blue), while the others are off (black).

Toggle on the buttons to subscribe the fields:

message_template_components_update, message_template_status_update ,
messages, phone_number_name_update, phone_number_quality_update,
template_category_update

Add the real phone number in production webhook configuration.

Setup completed here.

7.Adding New Phone Numbers

Visit WhatsApp Manager: https://business.facebook.com/latest/whatsapp_manager/

Under the Account tools tab, **phone numbers**. From right-top, select whatsApp Account (If multiple)

Click **Add Phone Number** to add additional WhatsApp numbers.

Now meta enforces businesses to verify their business before adding production phone numbers. In order to verify business , click “Know More” on the dashboard.

The image contains two screenshots of the WhatsApp Manager interface. The top screenshot shows the 'Phone numbers' section. A red box highlights the 'Phone numbers' button in the sidebar. A red arrow points from this box to the 'See more' link in the top right corner of the main content area. The bottom screenshot shows the 'Overview' section. A red box highlights the 'Verify your business' button in the 'Grow your business' section.

*Important

The image shows the 'Settings' page in the Facebook Business Manager. A red box highlights the 'Business verification' section under the 'Security Centre'. This section includes a dropdown menu for 'Select your verification use case' set to 'Setting up a WhatsApp Business account', and a 'Start verification' button.

8.Managing People and System Users

visit <https://business.facebook.com/>

Navigate to Settings → Users.

People: Manage individuals with access.

System Users: Manage automated or API-based integrations.

Here we can generate access tokens for system users..

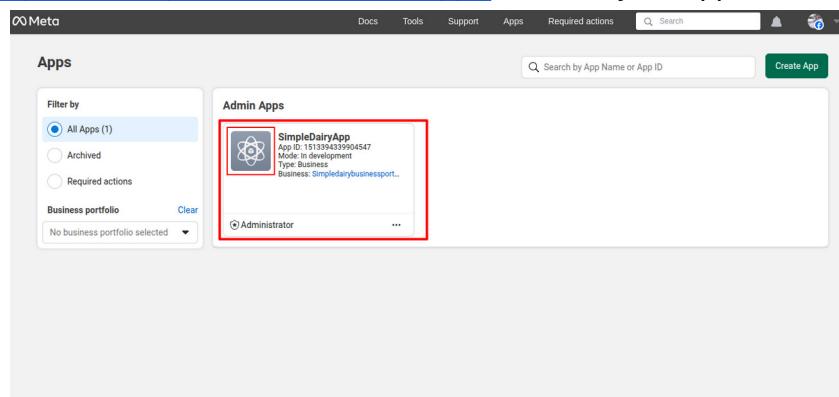
To assign assets or permissions:

Click on a user → Three-dot menu → Assign Assets.

How to retrieve credentials

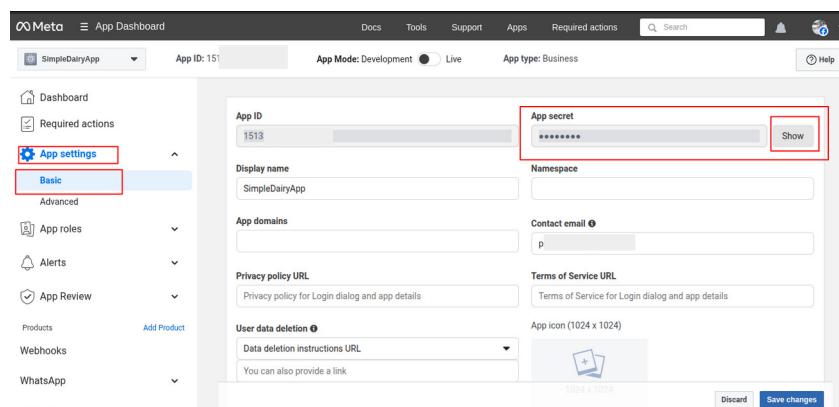
1.Retrieve App Secret

Visit <https://developers.facebook.com/apps/> .Select your app.



In the left sidebar, go to App Settings → Basic.

Click Show next to App Secret (you'll need to enter your Facebook password).



App ID - From the Top Header , You can copy the “App ID”

2. Retrieve App ID

Go to <https://developers.facebook.com/apps/>

You'll find the App ID listed below each app name.

3. Retrieve Business Portfolio ID

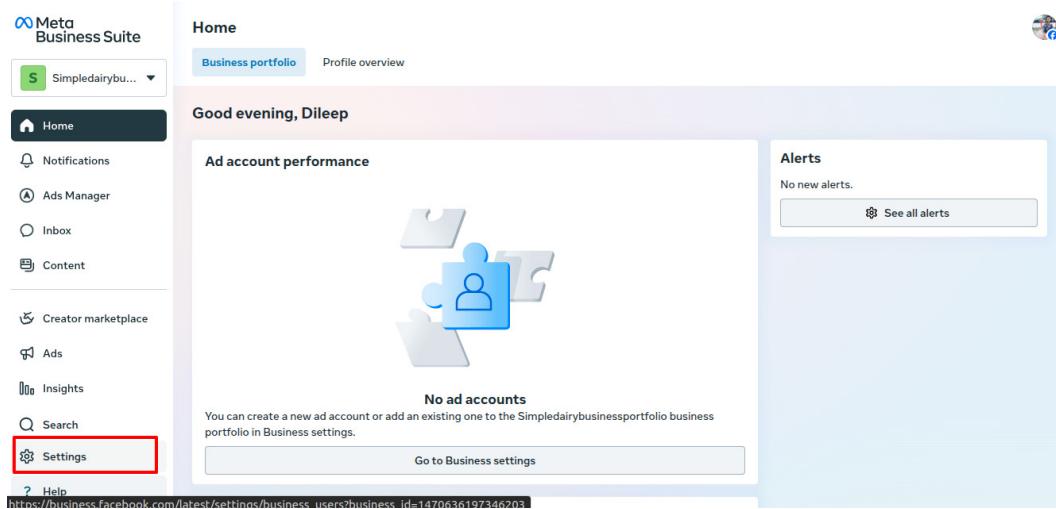
Visit <https://business.facebook.com/>

In the left sidebar, go to Settings → Business Info.

Your Business ID will be displayed there.

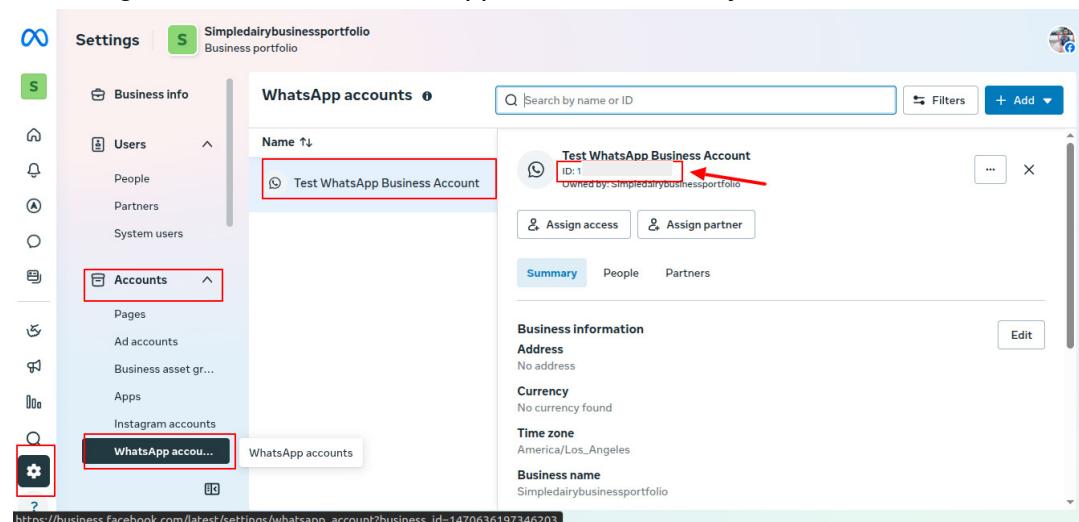
4. Retrieve WhatsApp Business Account (WABA) ID

Go to <https://business.facebook.com/>



The screenshot shows the Facebook Business Suite interface. On the left, a sidebar includes links for Home, Notifications, Ads Manager, Inbox, Content, Creator marketplace, Ads, Insights, Search, and Settings. The 'Settings' link is highlighted with a red box. The main area displays a message 'Good evening, Dileep' and an 'Ad account performance' section with a 'No ad accounts' message. A button 'Go to Business settings' is visible. On the right, there's an 'Alerts' section stating 'No new alerts.' with a 'See all alerts' button. The URL at the bottom is https://business.facebook.com/latest/settings/business_users?business_id=1470636197346203.

In Settings → Accounts → WhatsApp Accounts, select your account.



The screenshot shows the 'WhatsApp accounts' section of the Facebook Business Suite. The sidebar has a 'Settings' tab and a 'Business info' section. Under 'Accounts', there are links for Pages, Ad accounts, Business asset gr..., Apps, Instagram accounts, and WhatsApp accounts. The 'WhatsApp accounts' link is highlighted with a red box. A search bar and filter buttons are at the top. A table lists a single account: 'Test WhatsApp Business Account' (ID: 1, Owned by: Simpledairybusinessportfolio). Buttons for 'Assign access' and 'Assign partner' are shown. Below the table, sections for 'Business information', 'Address' (No address), 'Currency' (No currency found), 'Time zone' (America/Los_Angeles), and 'Business name' (Simplesdairybusinessportfolio) are displayed. An 'Edit' button is highlighted with a red box. The URL at the bottom is https://business.facebook.com/latest/settings/whatsapp_account?business_id=1470636197346203.

Copy the WhatsApp Business Account ID shown below.

You can also create/link new WhatsApp accounts here.

5. Retrieve Phone Number ID

Visit:

https://developers.facebook.com/apps/<your_app_id>/whatsapp-business/wa-dev-console/?business_id=<your_business_id>

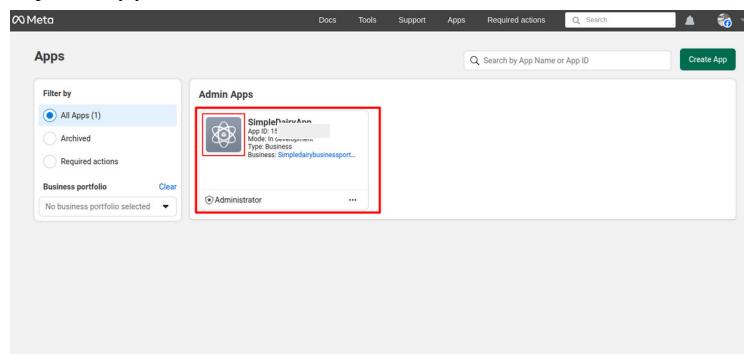
You'll see the Phone Number ID listed for each number.

Each WhatsApp number has its own unique Phone Number ID.

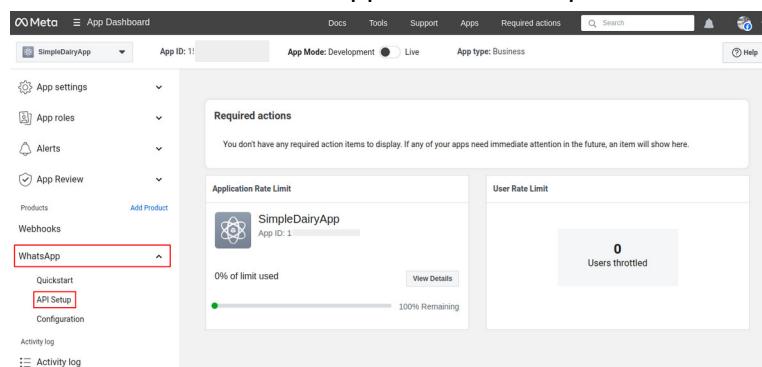
OR

Visit: <https://developers.facebook.com/apps/>

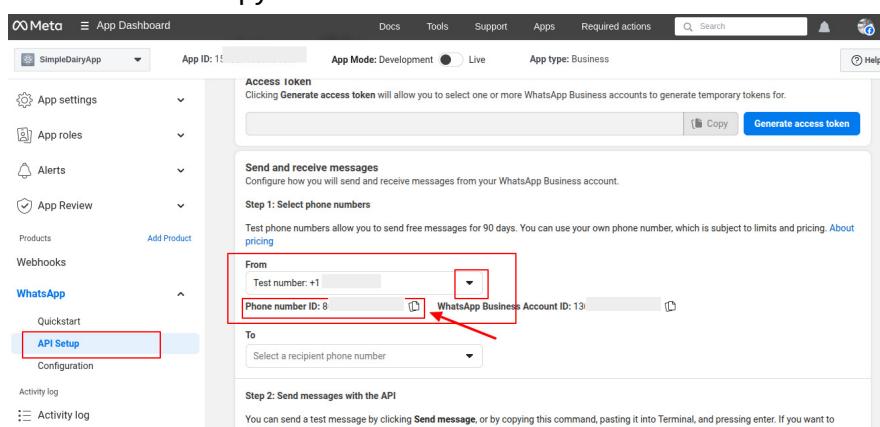
Click on your app.



In the left side bar, under whatsapp click API setup.



You can see the "From" option, choose the phone number for which you want the phone number id. You can copy it.

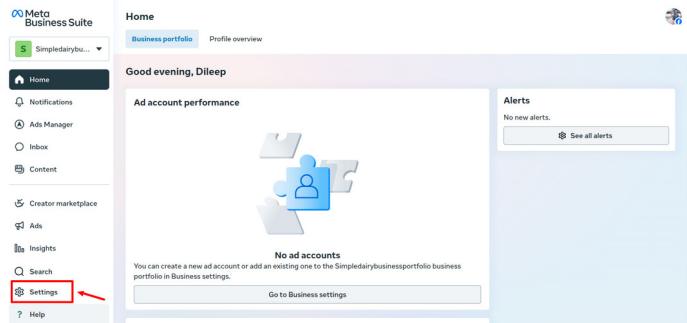


6. Access WhatsApp Manager

Visit: https://business.facebook.com/latest/whatsapp_manager/

7. Retrieve access token:

visit <https://business.facebook.com/>



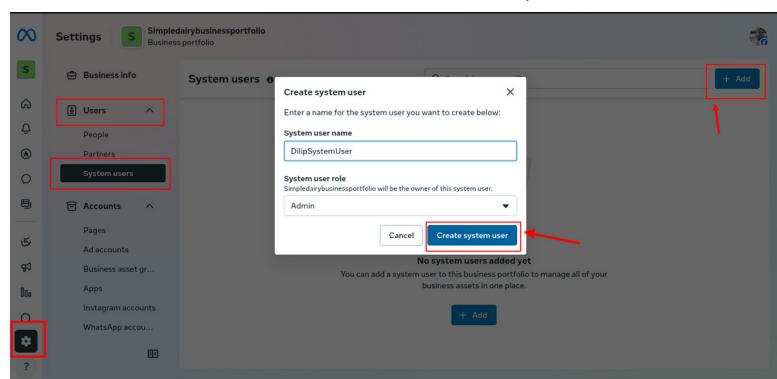
Navigate to Settings → Users.

People: Manage individuals with access.

System Users: Manage automated or API-based integrations.

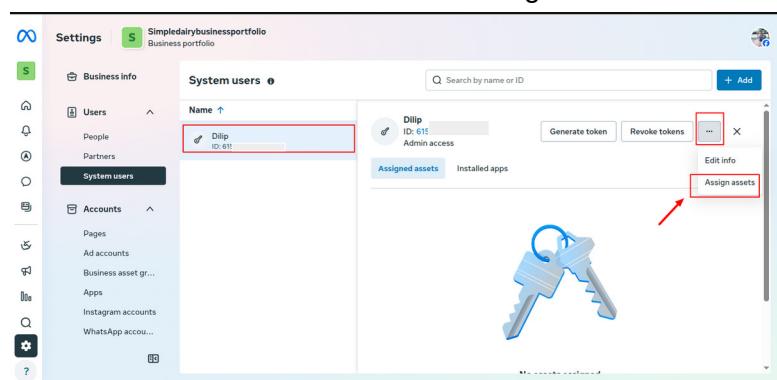
Here we can generate access tokens for **system users**.

If you do not have a System user, then click on **Add** and create a system user. Give a name to the user. Select Admin as role, then click “create system user”.



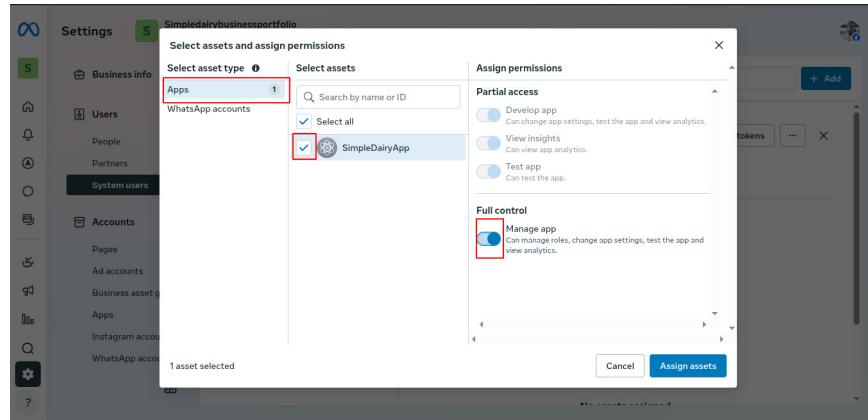
To assign assets or permissions:

Click on a user → Three-dot menu → Assign Assets.



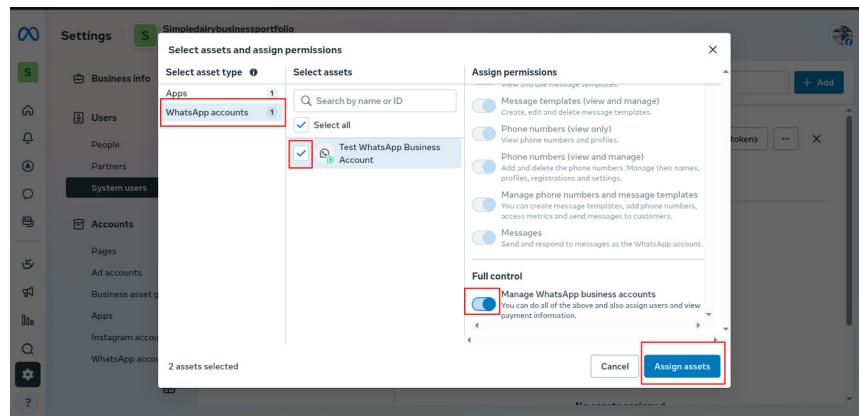
After clicking Assign assets, a pop up will appear.

In the App tab, select the app which you want to assign and give permission as "full control" by toggling on the button.



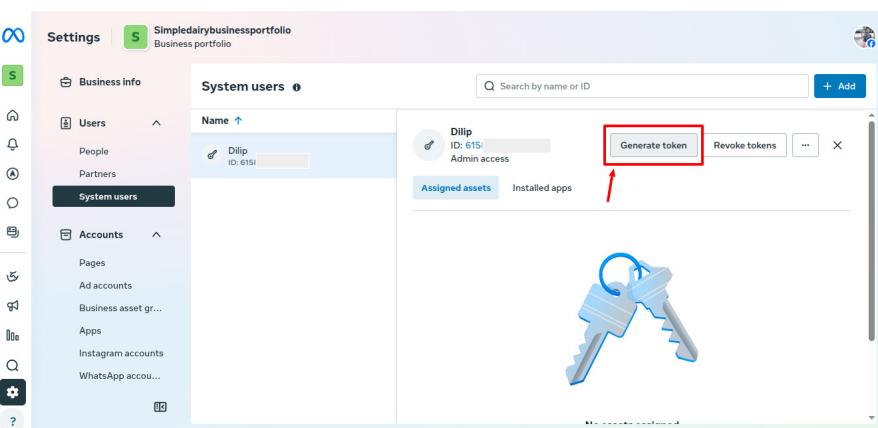
Now click on the "Whatsapp Account tab". Select the whatsapp account you want to assign. Give full control as permission by toggling on the button.

Now click Assign Assets.

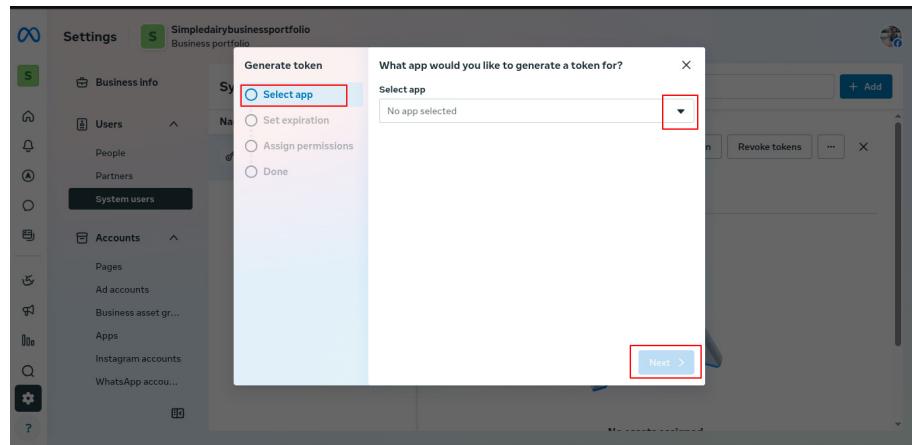


If you already have the system user, then properly check for the assigned assets and permission before generating access token.

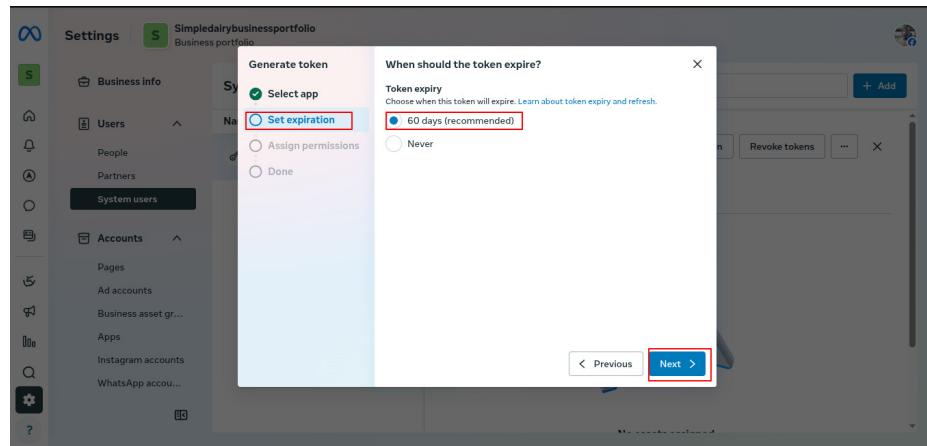
Click on **Generate token**.



A pop up will appear. Select the App for which you want to generate the token. Click next.

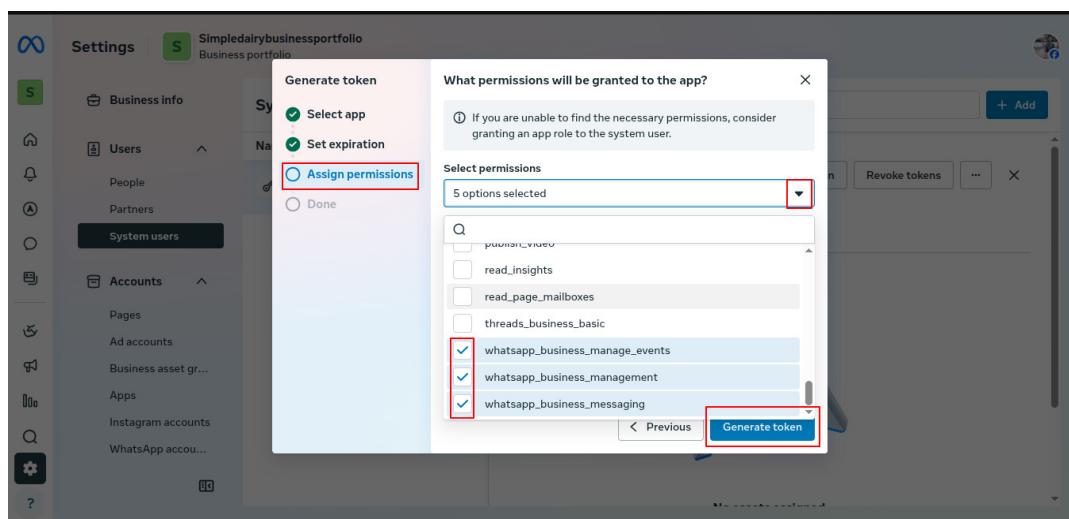


Set expiration time and click next.

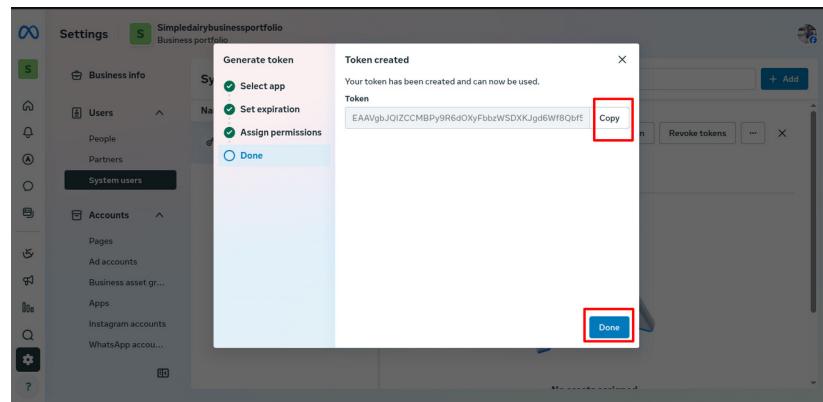


In the Assign permission tab, choose the below permission from the dropdown:
business_management, catalog_management, whatsapp_business_manage_events,
whatsapp_business_management , whatsapp_business.messaging

Now click “generate tokens”.



Copy the token and click done.



8. Template Management : Creating, deleting, editing the Template

Visit whatsapp manager: https://business.facebook.com/latest/whatsapp_manager/

Click on "Manage Template" to create all types of templates.

We need to connect the template to the WABA and APP. Select the WABA from top (if multiple).

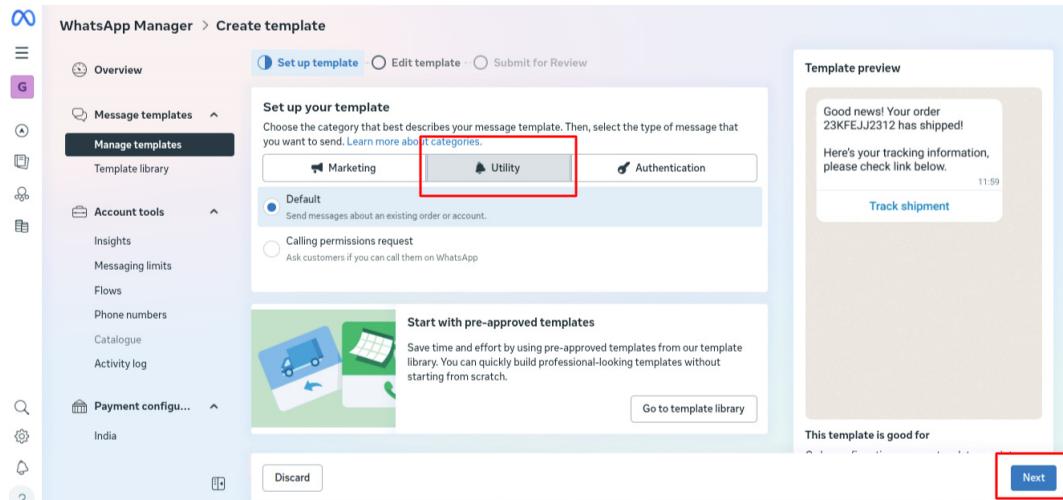
The template takes 24 hours minimum to get approved.

We can also create a Catalog Template from here - ensure you have at least one product added.

Template name	Category	Language	Status	Messa sent	Messa opene	Top block...	Last edited
text_template	Marketing	English (US) Hi, [{{}}] - your daily Da...	Active - Quality	0	0	--	24 Nov 2025
invoice_template	Utility	English (US) Hello [{{}}]. This is your ...	Active - Quality	0	0	--	18 Nov 2025
doc_template	Marketing	English (US) Invoice	Active - Quality	0	0	--	17 Nov 2025
vid_template	Marketing	English (US) Hi	Active - Quality	--	0	--	17 Nov 2025
document_template	Utility	English (US) Thank you for your pur...	Active - Quality	--	0	--	17 Nov 2025
catalog_template	Marketing	English Kinder schuhe, herren schluef...	Active - Quality	0	0	--	24 Sep 2025

Creating template:

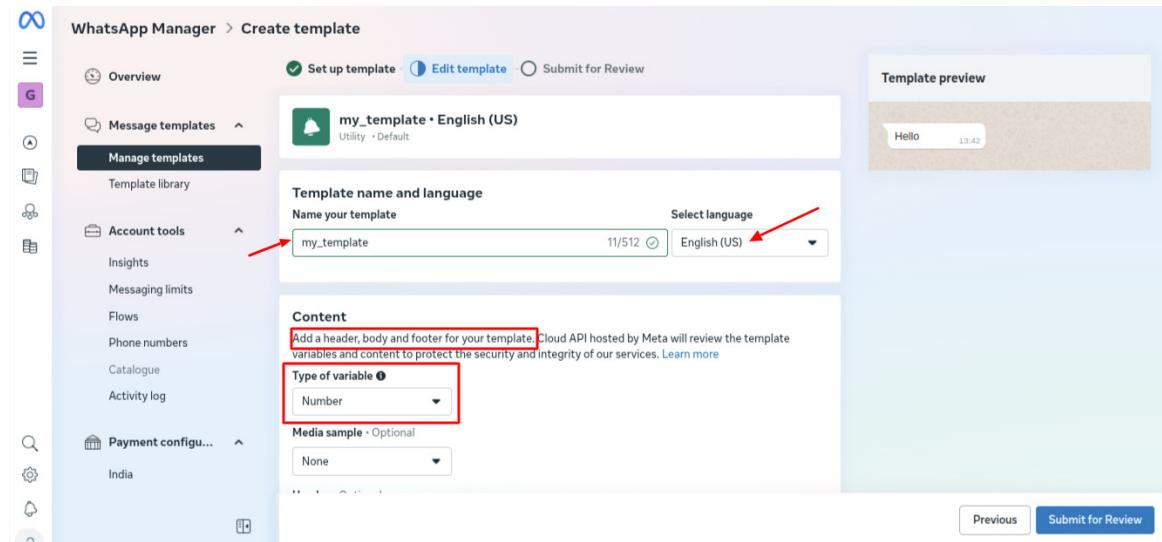
After clicking on the “**Create Template**” button, choose the category for the template as per use case. Then click next.



Template Setup:

A: Template name and language

Now we have to setup the template. Enter template name. Select “English(US)” as template language in case of choosing english. You can choose any other language too , but for English you must choose “English(US)”.



NOTE

For adding variables in template choose “Number” as type of variable and do not choose “Name”. This is what we support in our backend.

B: Content

In the content section we have to define the body and header structure of the template.

NOTE: Any type of media can only be sent through the header section.

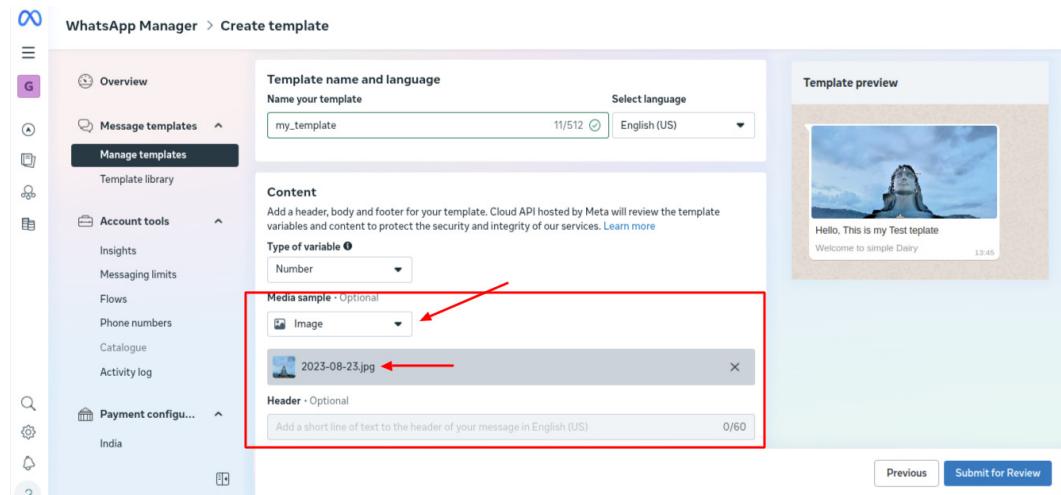
Media can be of type document (pdf only), image, video and location.

1: Header & Header Variables of a template

Header can be of two types: "Text header" or "Media header", any one at a time. We can add header variables only for Text header. It is not allowed to add header variables for Media header.

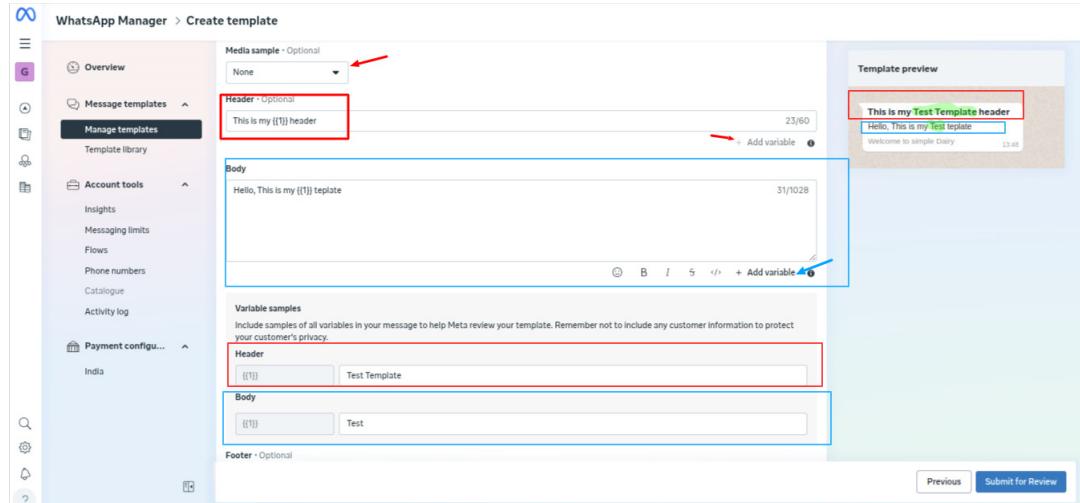
Media header:

If we want to send any media then choose the appropriate media type in the "Media Sample" dropdown. Upload a demo and valid type media for reference.



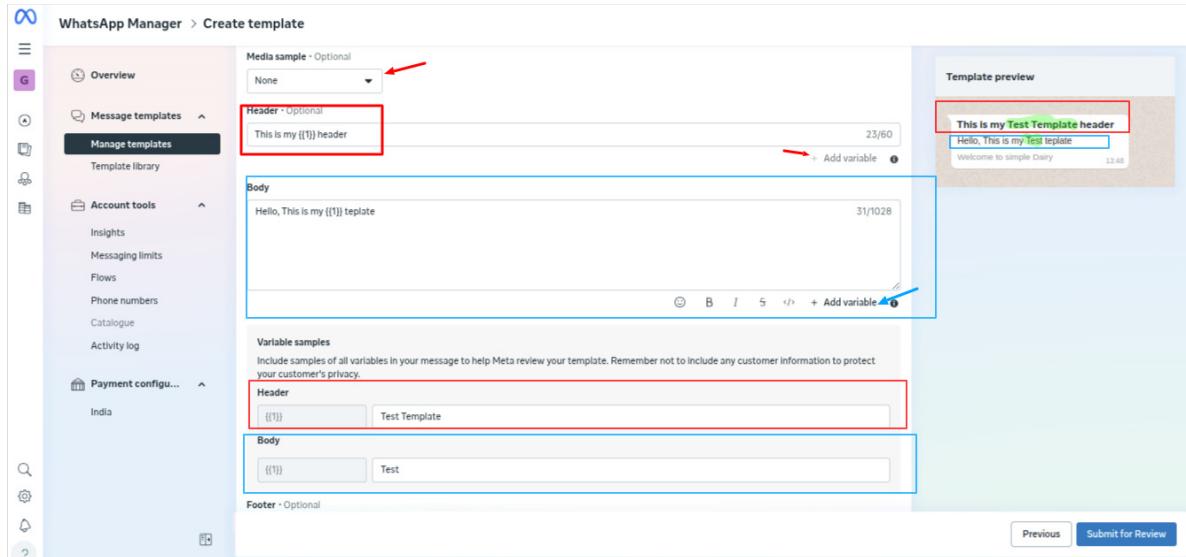
Text header:

To send a text header, you must choose “**none**” in “**Media Sample**” dropdown.
In text header, we can add the header variables.



All Types of variables will be visible in the “Variable Sample” section once you added any variable in header or body. Here you need to give a sample variable value.

2: Body & Body Variables of a template



3. Footer of a template:

Footer is static in nature. We can enter the desired footer text in footer section.

C: Buttons

Buttons are of many types. In this doc we will cover two types: 1: Custom Button(Quick Reply) and 2: Visit Website Button.

1: Custom Button(Quick Reply)

This is the simplest one. It does not require any variables. You can fill button text as per your requirement. When the user clicks on this button, you will get a webhook request from meta with button_id exactly the same as button text.

2: Visit Website Button.

This button are of two types: 1: Static URI and, 2: Dynamic URL

Button with dynamic variable will accepts only one argument and it will be placed at last of URL.

Example: <https://www.simpledairy.com/users>.

Here "users" is the dynamic variable.

The screenshot shows the WhatsApp Manager interface under 'Create template'. On the left, there's a sidebar with various tools like Overview, Message templates, Account tools, and Payment configuration. The main area is titled 'WhatsApp Manager > Create template'.

In the center, there are two sections for buttons:

- Quick reply - Optional:** A green-bordered section containing a 'Type' dropdown set to 'Custom' and a 'Button text' input field with 'Quick Reply'.
- Call to action - Optional:** A pink-bordered section with two rows of buttons.
 - Row 1: 'Type of action' dropdown set to 'Visit ...', 'Button text' input field with 'Visit website', 'URL type' dropdown set to 'Static', and 'Website URL' input field with 'https://www. 28/2000'.
 - Row 2: 'Type of action' dropdown set to 'Visit ...', 'Button text' input field with 'Visit Dynamic w. 21/25', 'URL type' dropdown set to 'Dyna...', and 'Website URL' input field with 'https://w. 28/2000' followed by a placeholder '({1})' with a red arrow pointing to it.

Below these sections is a 'Template preview' window with a red border, showing a sample message template:

```
This is Test Template header  
Hello Test User. This is Body  
Welcome to simple dairy 14:00  
↳ Quick Reply  
↗ Visit website  
↗ Visit Dynamic website
```

At the bottom right of the main area, there are 'Previous' and 'Submit for Review' buttons, with 'Submit for Review' also having a red border.

9.Catalog Management:

We can manage catalog in commerce API. <https://www.facebook.com/commerce>

In the get started, click add products.

select catalog type, business portfolio and catalog name

connect the catalog to your app

For upload product - Choose manual upload

Add at least one product

Now you can visit the commerce manager and manage the catalog.

For assets, permission, delete etc for catalog, goto settings of commerce manager:

<https://www.facebook.com/commerce>

Saving credentials in database

We store all the credentials in the database. We stored this securely by encrypting.

Rails 8 automatically:

- Encrypts attributes(which we declare in model as: "encrypts :attr_name") before saving to the database
- Decrypts them when you read them back
- Handles signing, key management, and rotations internally

Rails uses three keys for Active Record encryption:

ACTIVE_RECORD_ENCRYPTION_PRIMARY_KEY - Main encryption/decryption key

ACTIVE_RECORD_ENCRYPTION_DETERMINISTIC_KEY - Used for deterministic encryption (for searchable fields)

ACTIVE_RECORD_ENCRYPTION_KEY_DERIVATION_SALT - Used to derive unique sub-keys securely

We must define them in environment variables (or Rails credentials).

Run this command:

`bin/rails db:encryption:init`

Rails will generate something like: (Add this to your credentials or environment)

active_record_encryption:

primary_key: fD8x6ZO.....JzOBmg

deterministic_key: pYFzJZ.....mTR2bAz2gq

key_derivation_salt: Qf29pwF.....uaqHz4IQ

Documents and Details required to setup the whatsApp:

1. Active facebook account with email and mobile associated.
2. A valid phone number currently not associated with WhatsApp or WhatsApp Business app.
3. Country, Business Type(corporation, Partnership, Private Company, Institution, Sole proprietorship etc).
4. Business tax ID/Registration number, Business name.
5. GSTIN / MSME UDYAM / PAN / CIN / LLPIN