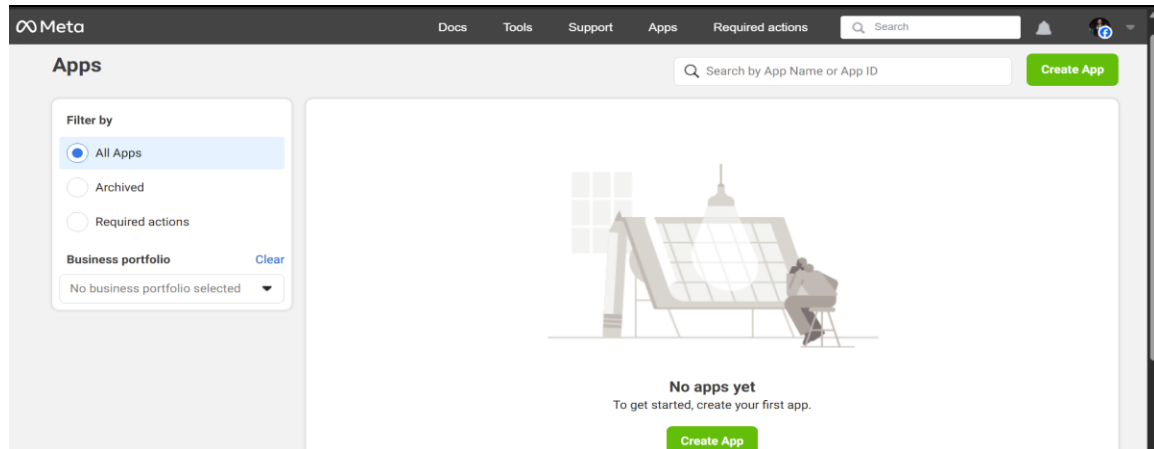


❓ How to Add WhatsApp in the CRM(contains both old and new method) Old Method

1❓ First of All, Create an App

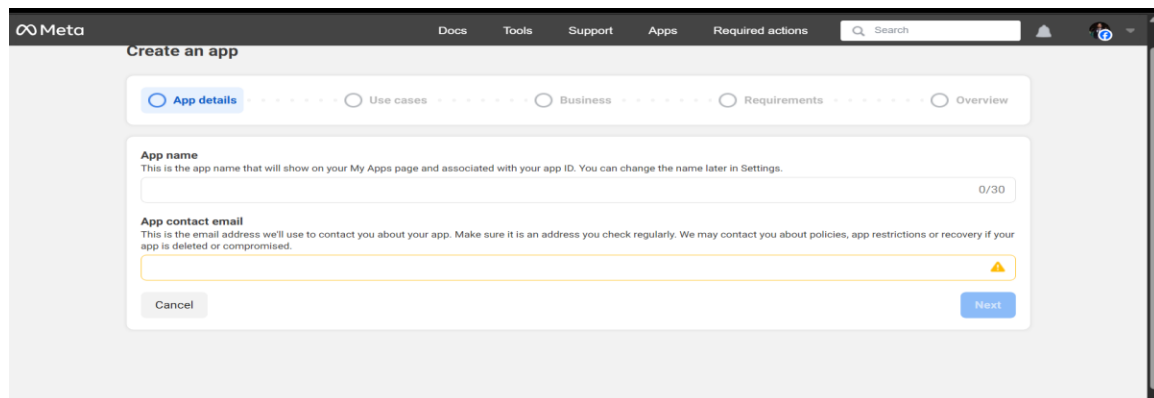
1. Go to Meta for Developers: <https://developers.facebook.com/>
2. If you don't have a Meta account, sign up using your Facebook credentials.
3. Once logged in, you'll see the Meta Developer Dashboard.
 - From the top-right corner, click My Apps.
 - Then click Create App.

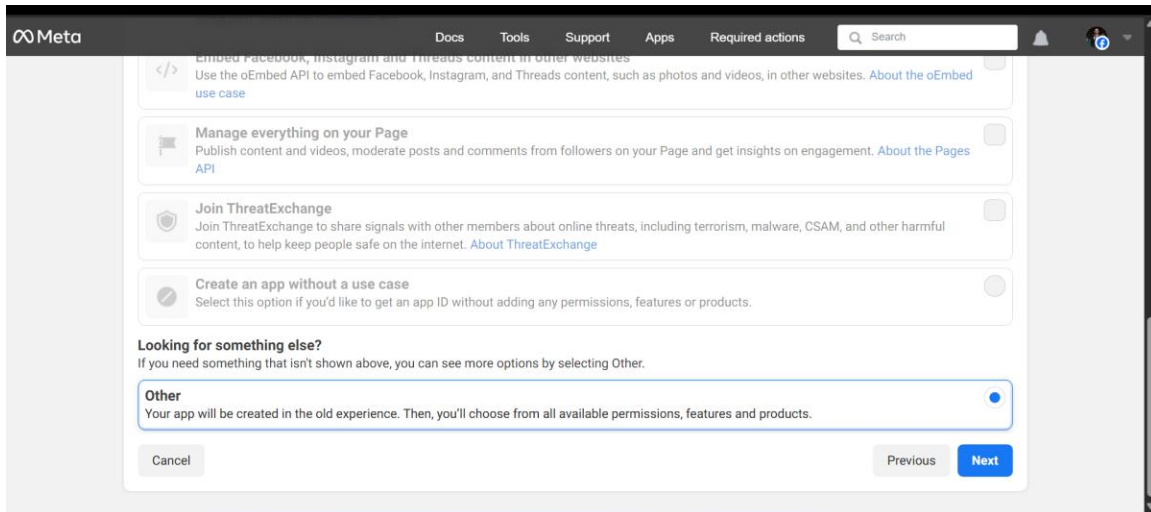
Z



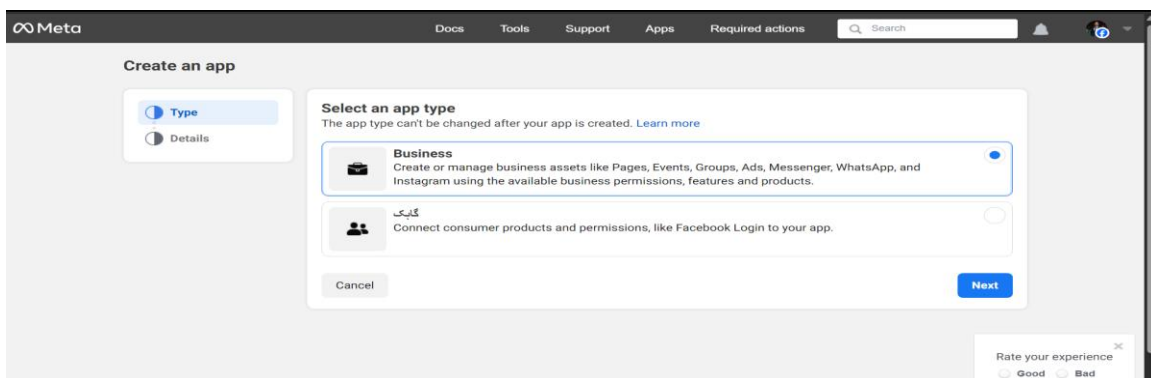
2❓ Configure the App(Contains both old and new) Old Method:

1. Enter the required details (App name, email, business account).
2. Click Next.

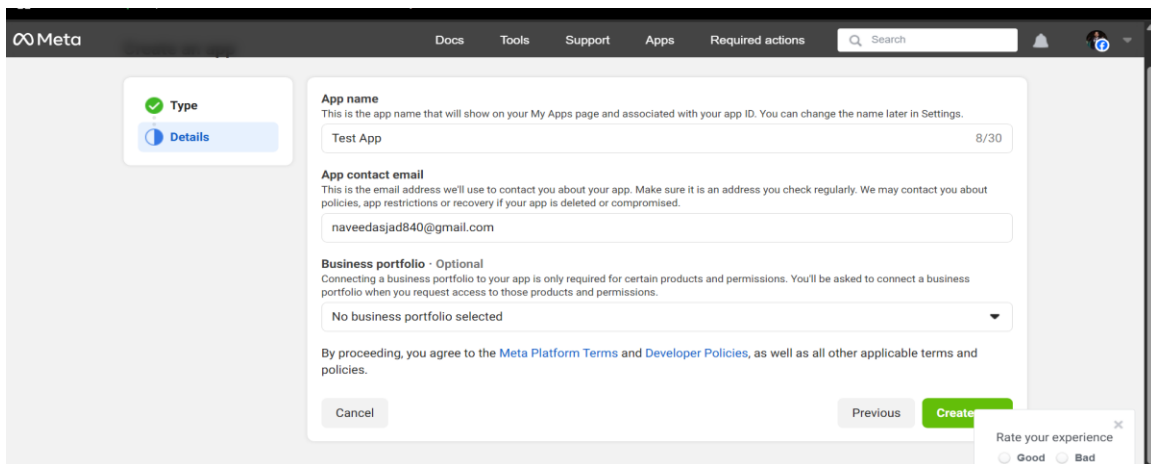




3. Select the App Type (choose Business for CRM integration).

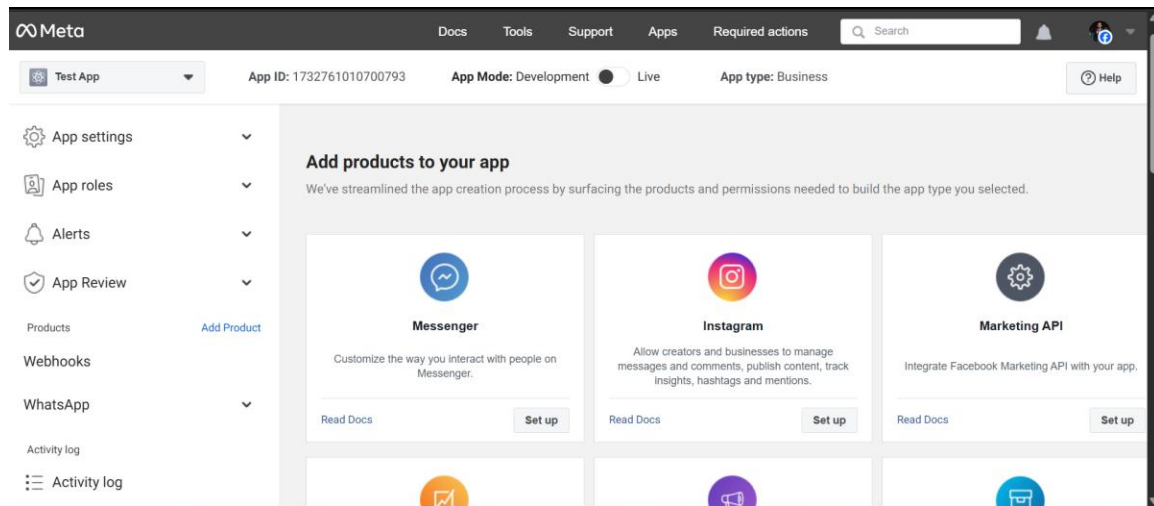


4. Click Create App.



3. Add WhatsApp and Webhooks

1. In the App Dashboard, go to Products → Add Product.

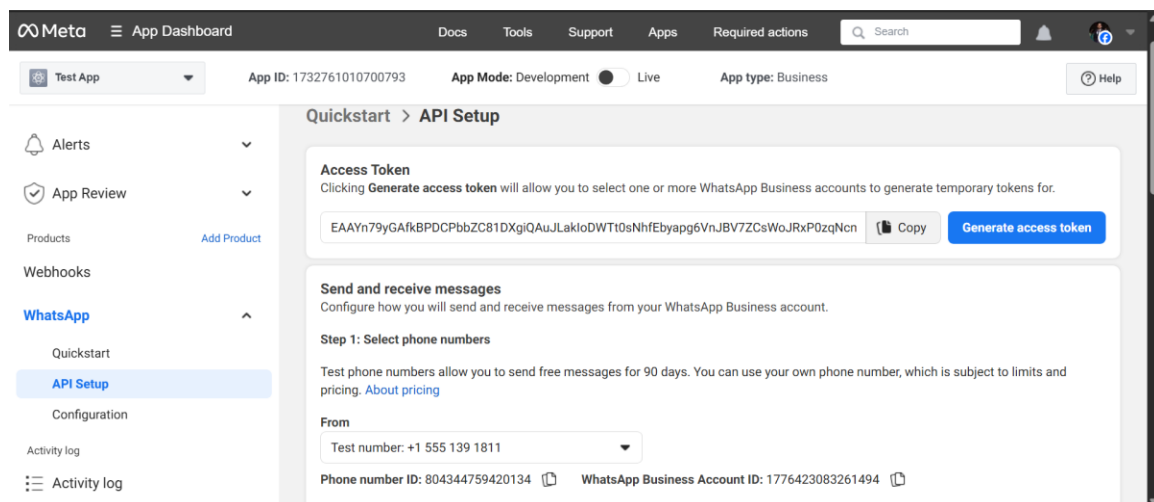


2. Select WhatsApp and Webhooks, then configure them.

3. Go to WhatsApp → API Setup, add a Business Portfolio and required details.

4. After that You'll see a screen with:

- Generate Access Token (click to generate and copy it).
- Phone Number ID (shown below the Test Number).



5. Paste this token and ID in your CRM's WhatsApp configuration.

6. Click Save Configuration.

?

WhatsApp

Krayin CRM WhatsApp Extension enables the store administrator to generate leads via their WhatsApp number. Krayin CRM WhatsApp can sync all messages of customers and merchants.

Status ☒

Phone number ID *

804344759420134

Access Token

EAAyH79yGArBPLazMcORNoB7ZBh8wtZA6VNpc3Rh0h0e4ecv9OWy501Fp7YoldDUkYfUCyGwx759Q9f5wCRzeUcvfmlVI2fLvcZBUowJqLaeXr5aALd8ZAUkAXEnd3LisVhJLZBthvF0eV0O2VyImrimwVKJmQb15k1T4Vva9Gk5CJgmtoT7v9SfWHLJxskzYIUZCXc4+0JOFZBWSK18TJUPzg4Xz7b4LwAZDZD

Webhook Verification Token

bhc_crm

Back Save Configuration

Powered by Krayin, an open-source project by Webkul.

4? Verify the WhatsApp Configuration

1. Navigate to WhatsApp → Configuration.
2. Enter the Verification Token and use the Callback URL provided.
3. Click Verify and Save.
4. If successful, you'll see a confirmation screen.

?

Meta App Dashboard Docs Tools Support Apps Required actions Search

Test App App ID: 1732761010700793 App Mode: Development Live App type: Business Help

Dashboard Required actions App settings App roles Alerts App Review Products Add Product Webhooks WhatsApp

Quickstart > Configuration

Webhook
To get alerted when you receive a message or when a message's status has changed, you need to set up a Webhooks endpoint for your app. [Learn how to configure Webhooks.](#)

Callback URL

https://hamayun.razormail.com/admin/whatsapp/webhook/handle-incoming-message

Verify token

bhc_crm

☒ Attach a client certificate to Webhook requests. [Learn more.](#)

Remove subscription Verify and save

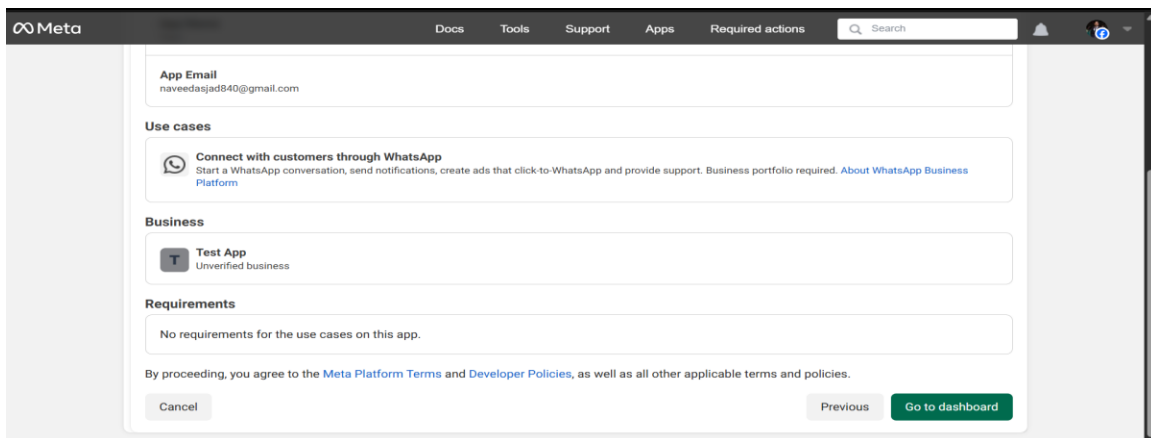
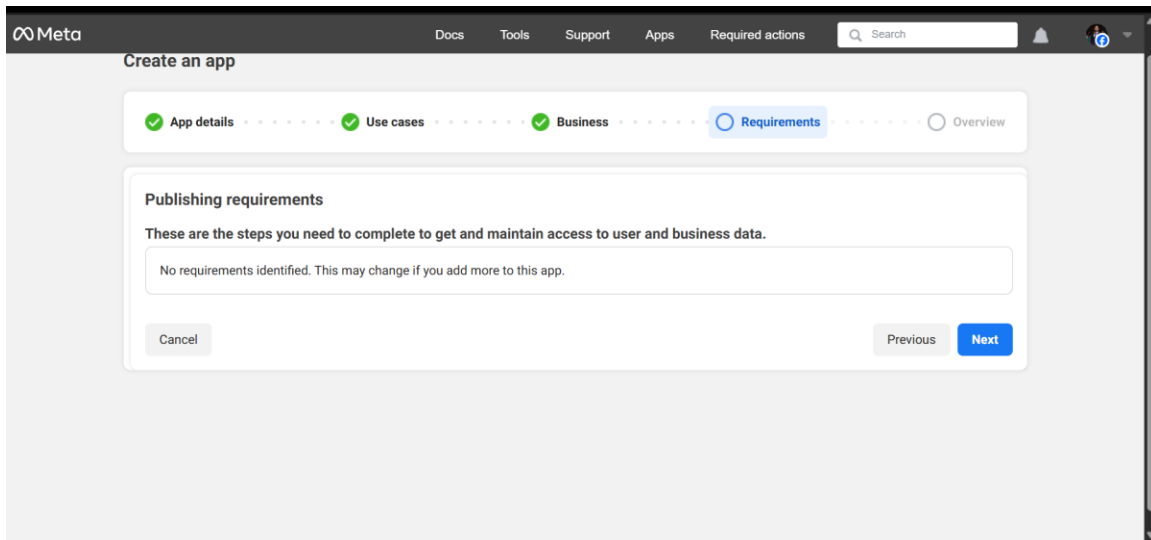
New Method

The same steps just screens shown here are different

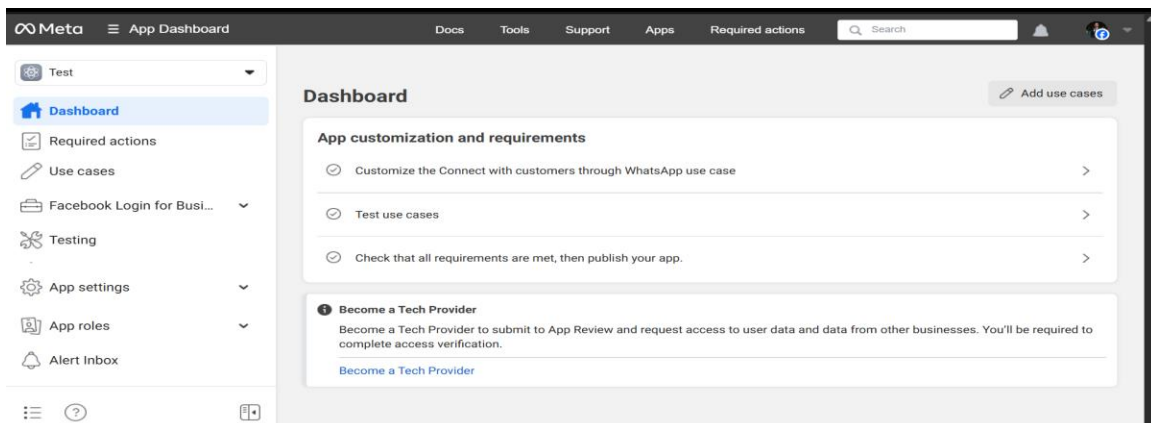
Note: Sometimes it shows this screen shown below after app name and email so don't be confused just select the options shown in the image.

The screenshot shows the 'Create an app' wizard in the Meta Developer Portal. The 'Use cases' step is active, showing a progress bar with 'App details' completed and 'Business', 'Requirements', and 'Overview' pending. Under 'Add use cases', there are three options: 'Engage with customers on Messenger from Meta', 'Manage messaging & content on Instagram', and 'Connect with customers through WhatsApp'. The 'Connect with customers through WhatsApp' option is selected with a blue checkmark. The 'Filter by' section on the left shows 'Business messaging (3)' selected. At the bottom, there is a 'Cancel' button, a '1 use case added' status, and 'Previous' and 'Next' buttons.

The screenshot shows the 'Create an app' wizard in the Meta Developer Portal, now at the 'Business' step. The progress bar shows 'App details' and 'Use cases' completed, with 'Business' active and 'Requirements' and 'Overview' pending. The main content area asks 'Which business portfolio do you want to connect to this app?' and provides instructions on connecting a verified business portfolio. There is a 'Test App' option with a 'T' icon. Below this, it asks 'Want to connect a new business portfolio?' with a link to 'Create a business portfolio'. At the bottom, there is a 'Cancel' button and 'Previous' and 'Next' buttons.

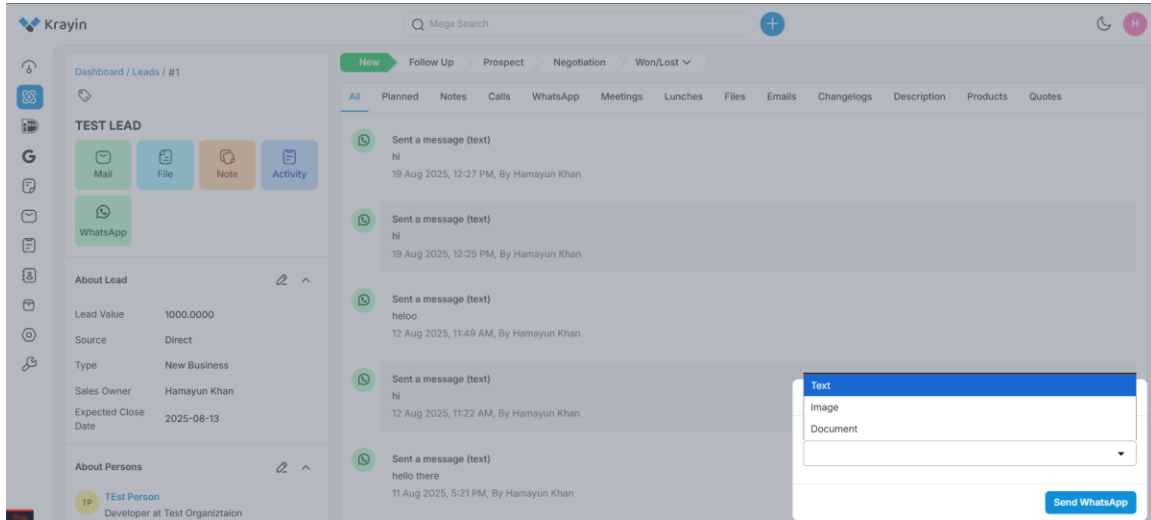


After this just click on the customize the use case and next same steps for configuration and the API setup as above.



5? Sending WhatsApp Messages from CRM

1. Go to Leads → Create a new Lead.
2. Open the Lead and you'll see the WhatsApp icon.



3. Click the icon → choose the type of message to send.
4. Before sending real messages:
 - Send a test message to the WhatsApp Test Number given in WhatsApp → API Setup.
5. After successful test, you can send messages and receive them in WhatsApp.

