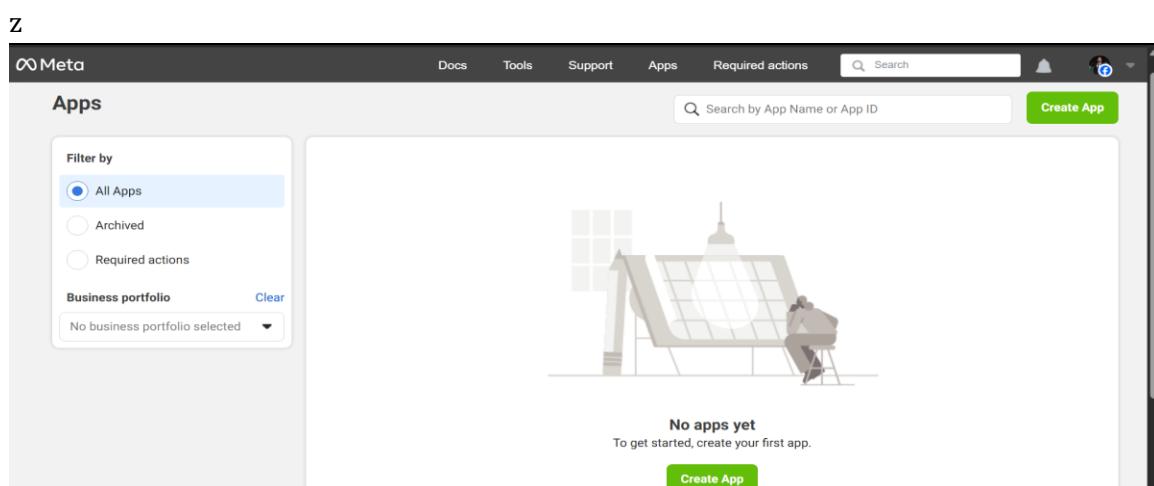


2 How to Add WhatsApp in the CRM(contains both old and new method)

Old Method

1 First of All, Create an App

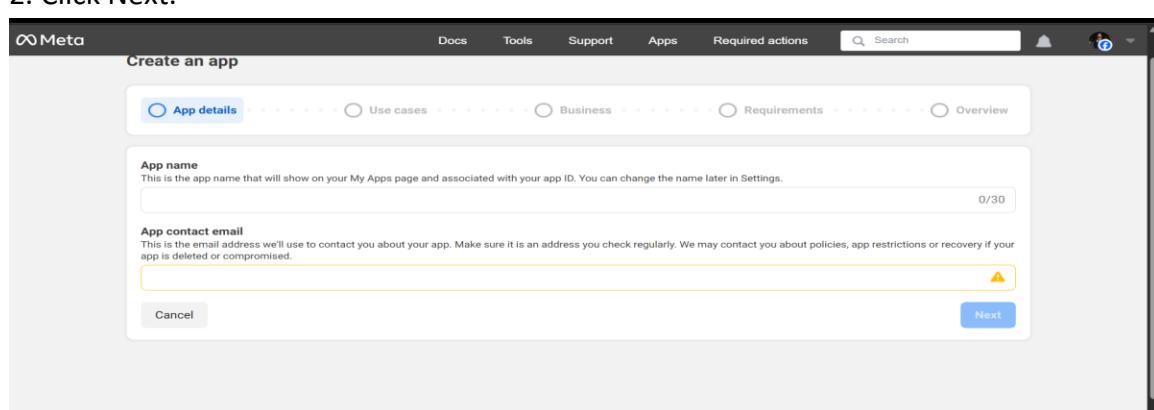
1. Go to Meta for Developers: <https://developers.facebook.com/>
2. If you don't have a Meta account, sign up using your Facebook credentials.
3. Once logged in, you'll see the Meta Developer Dashboard.
 - From the top-right corner, click My Apps.
 - Then click Create App.

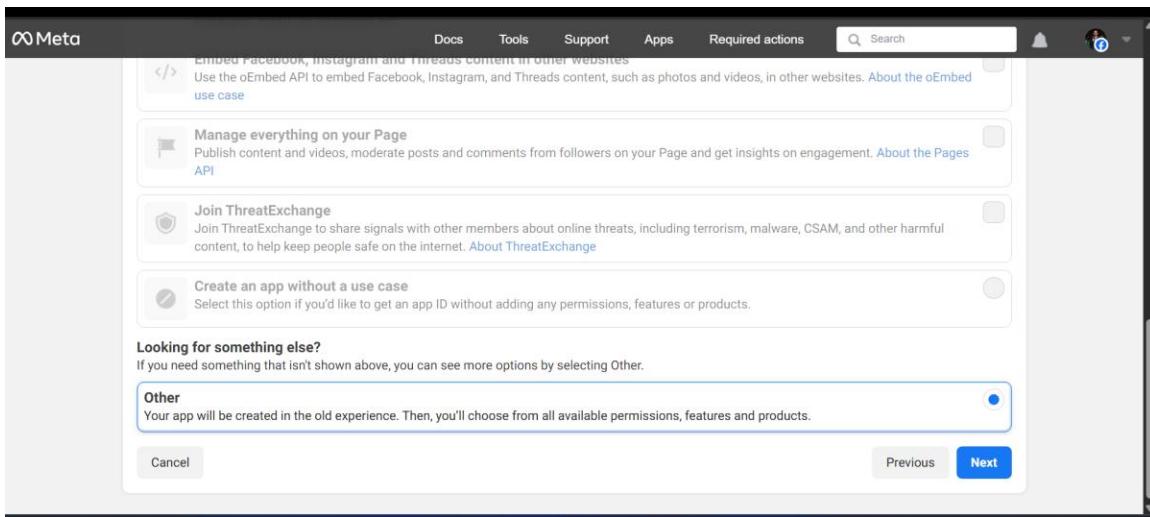


2 Configure the App(Contains both old and new)

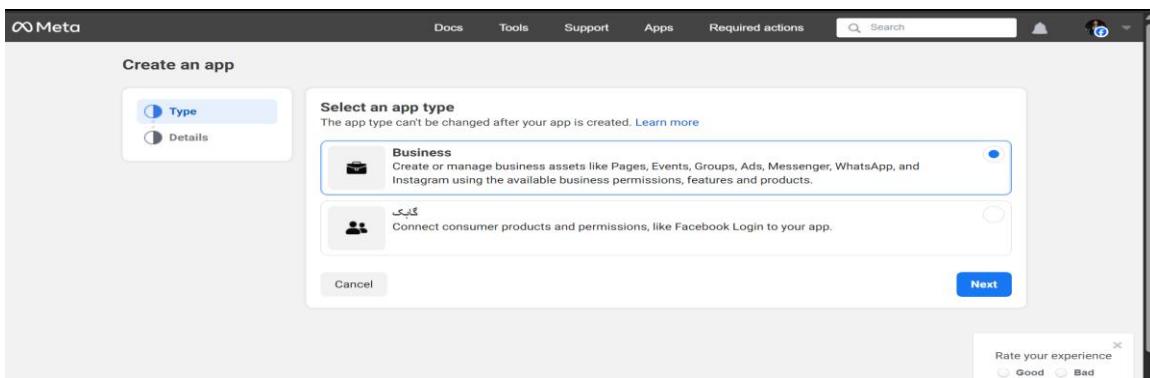
Old Method:

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

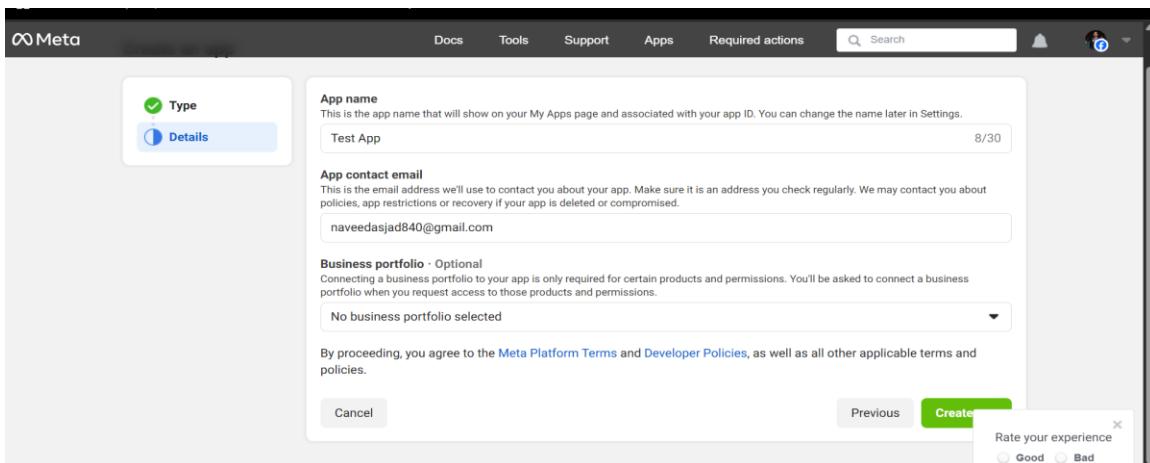




3. Select the App Type (choose Business for CRM integration).

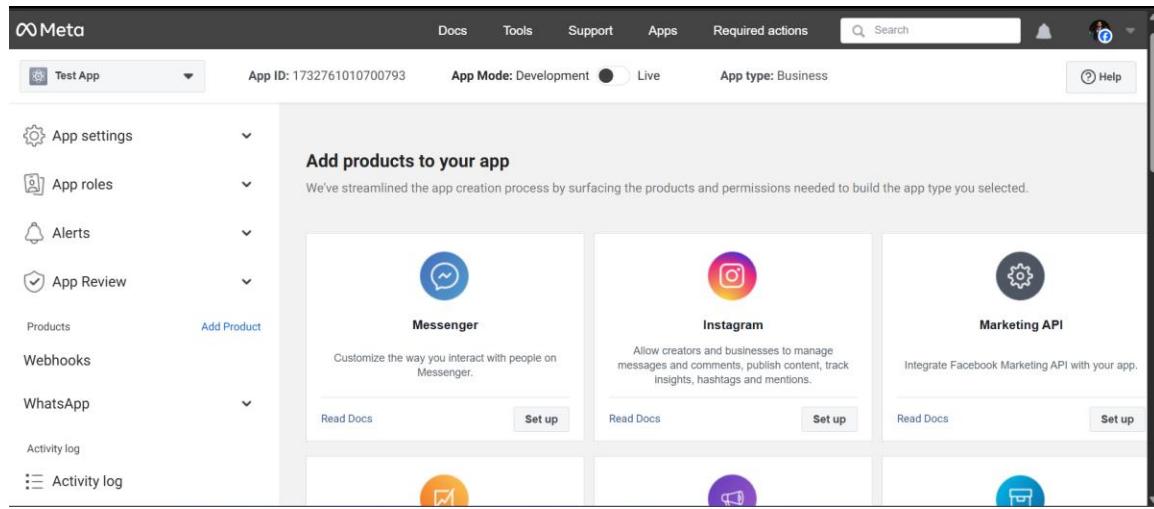


4. Click Create App.



3. Add WhatsApp and Webhooks

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



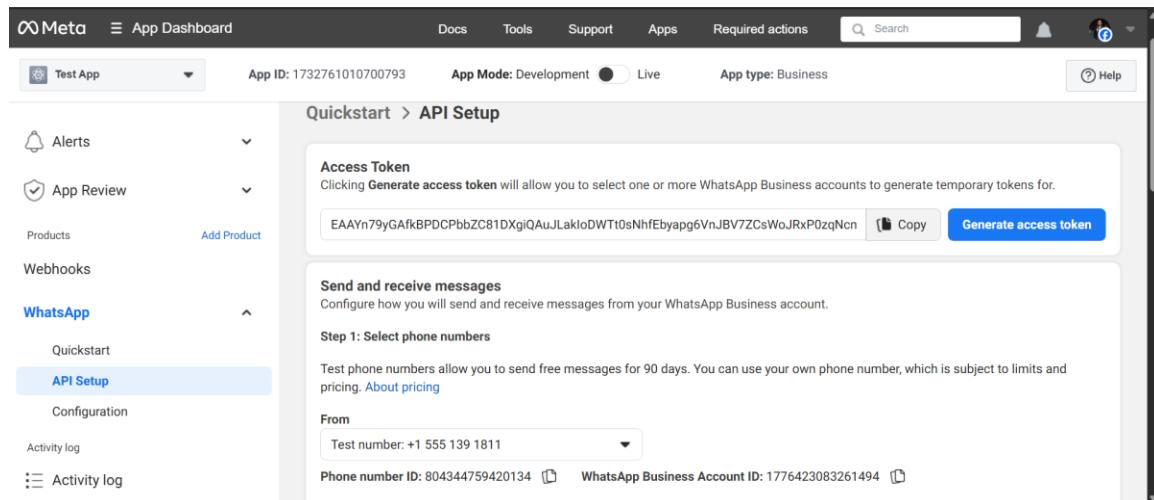
The screenshot shows the Facebook App Dashboard for a 'Test App' with App ID 1732761010700793. The 'Products' section is open, showing options like Messenger, Instagram, and Marketing API, each with a 'Set up' button. WhatsApp and Webhooks are also listed in the sidebar. The 'App Mode' is set to 'Development' and 'Live'.

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:

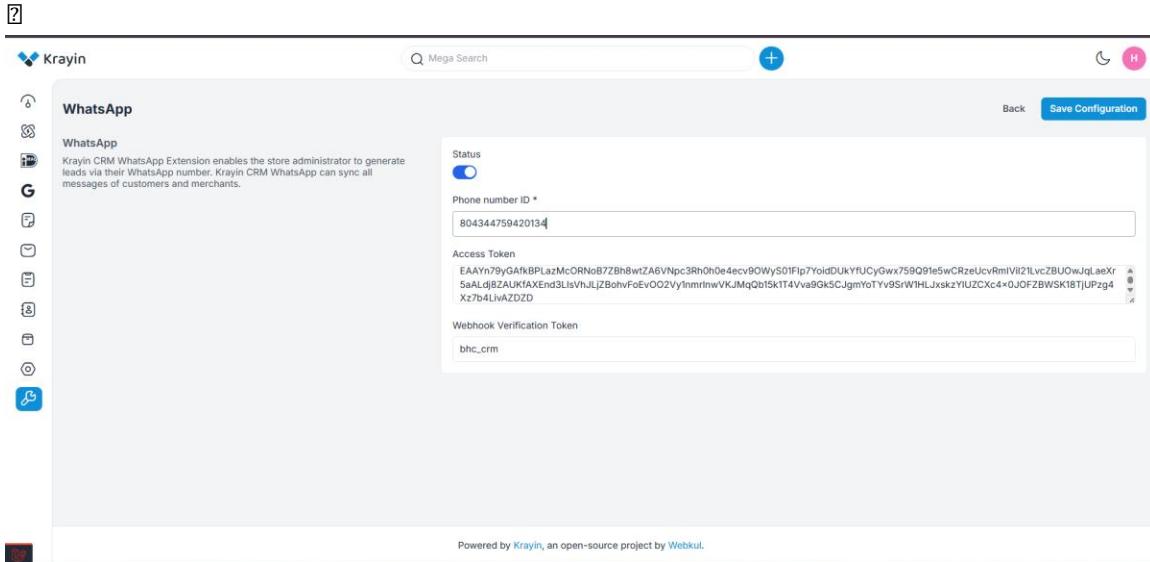
- Generate Access Token (click to generate and copy it).
- Phone Number ID (shown below the Test Number).



The screenshot shows the 'API Setup' section of the Facebook App Dashboard. It displays an 'Access Token' (EAAYn79yGAfkBPDCPbbZC81DXgiQAuJLakloDWTT0sNhEBayapg6VnJBV7ZCsWoJRxP0zqNcn) with a 'Copy' button and a 'Generate access token' button. Below it is a 'Send and receive messages' configuration section with a 'Step 1: Select phone numbers' sub-section. The 'From' field shows 'Test number: +1 555 139 1811'. Other fields include 'Phone number ID: 804344759420134' and 'WhatsApp Business Account ID: 1776423083261494'.

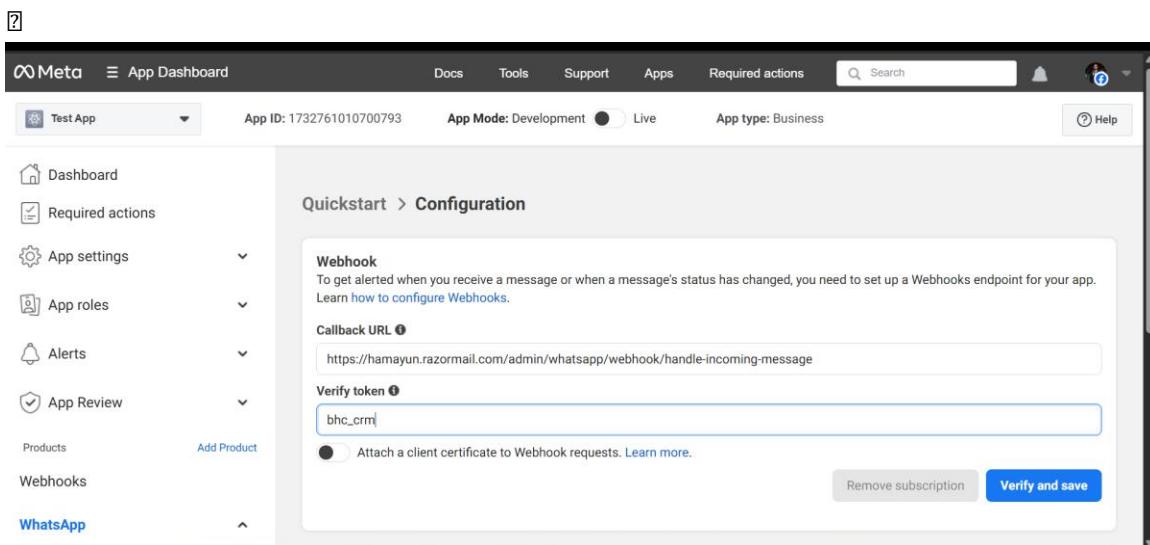
5. Paste this token and ID in your CRM's WhatsApp configuration.

6. Click Save Configuration.



4 Verify the WhatsApp Configuration

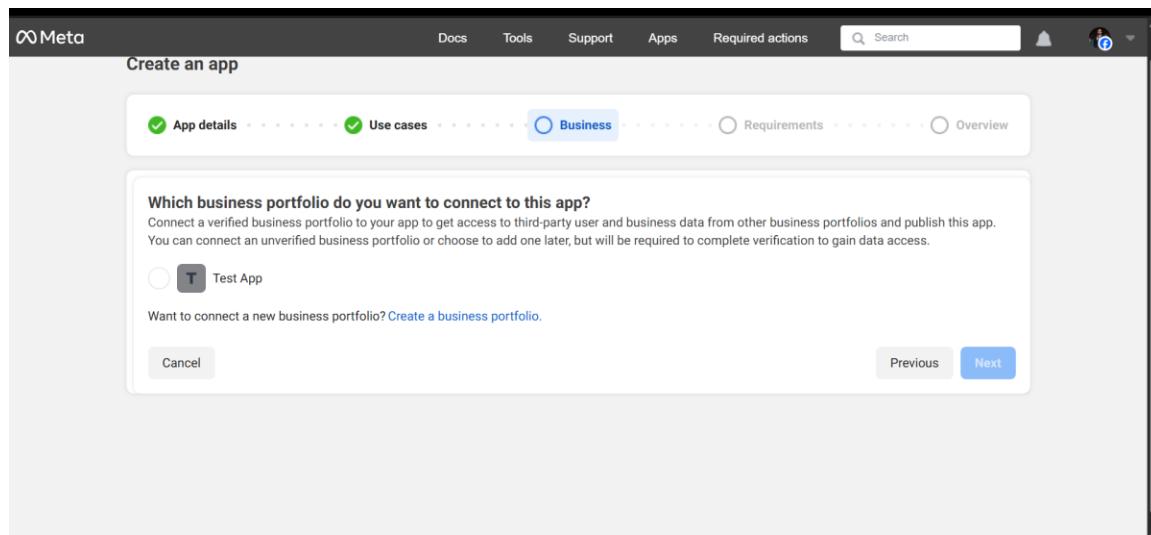
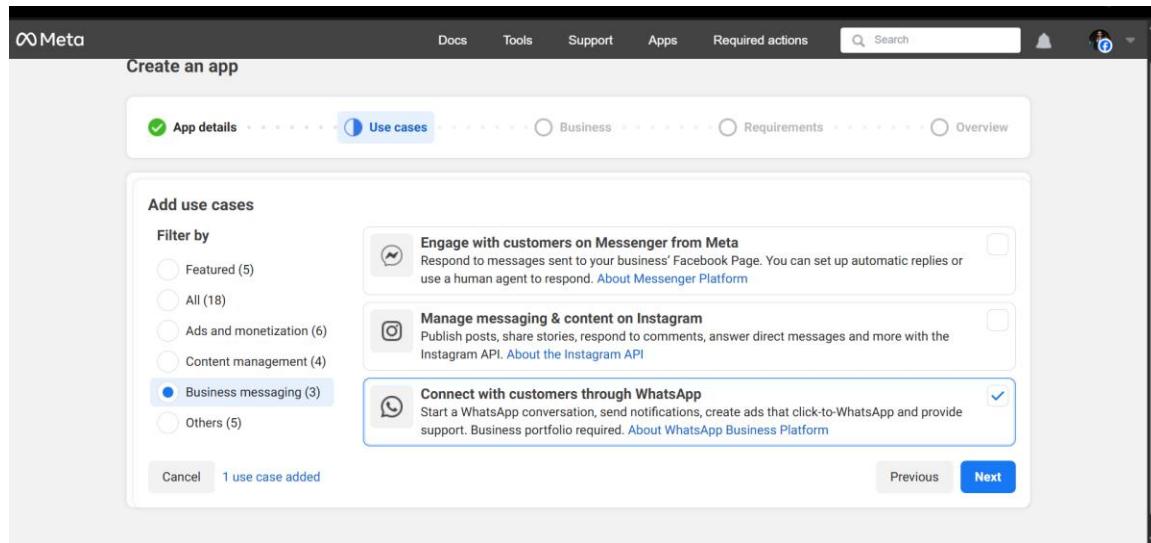
1. Navigate to WhatsApp → Configuration.
2. Enter the Verification Token and use the Callback URL provided.
3. Click Verify and Save.
4. If successful, you'll see a confirmation screen.

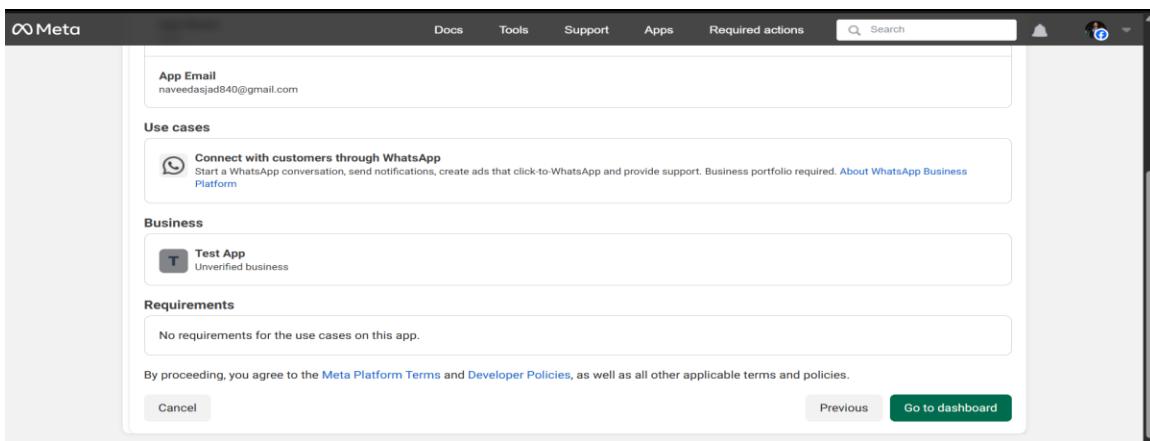
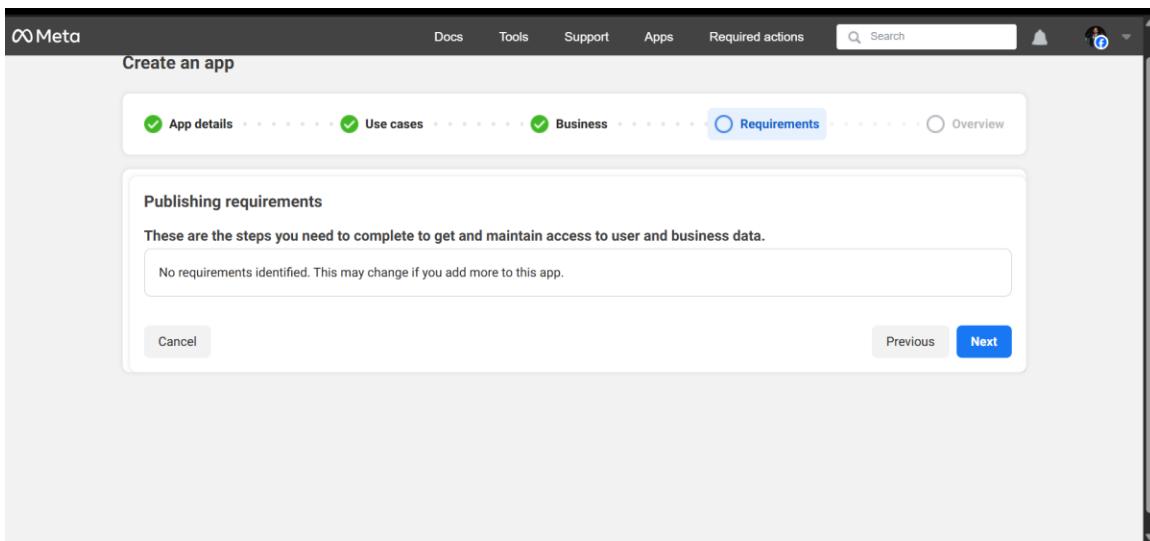


New Method

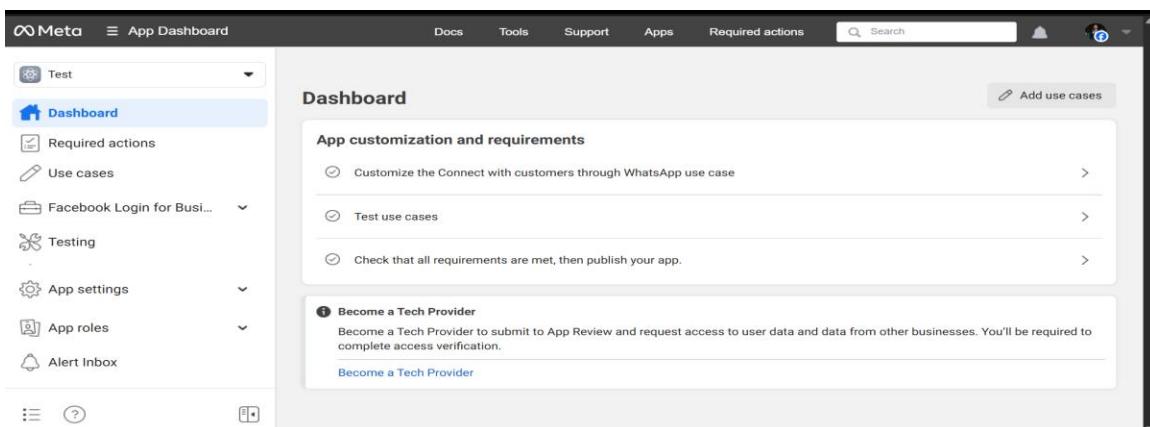
The same steps just screens shown here are different

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.



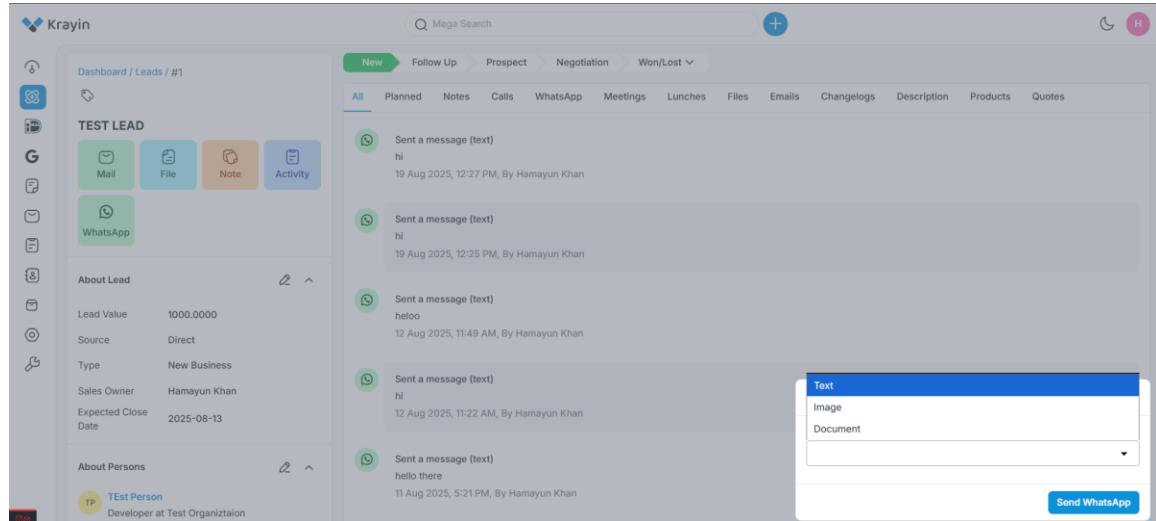


After this just click on the customize the use case and next same steps for configuration and the API setup as above.



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.



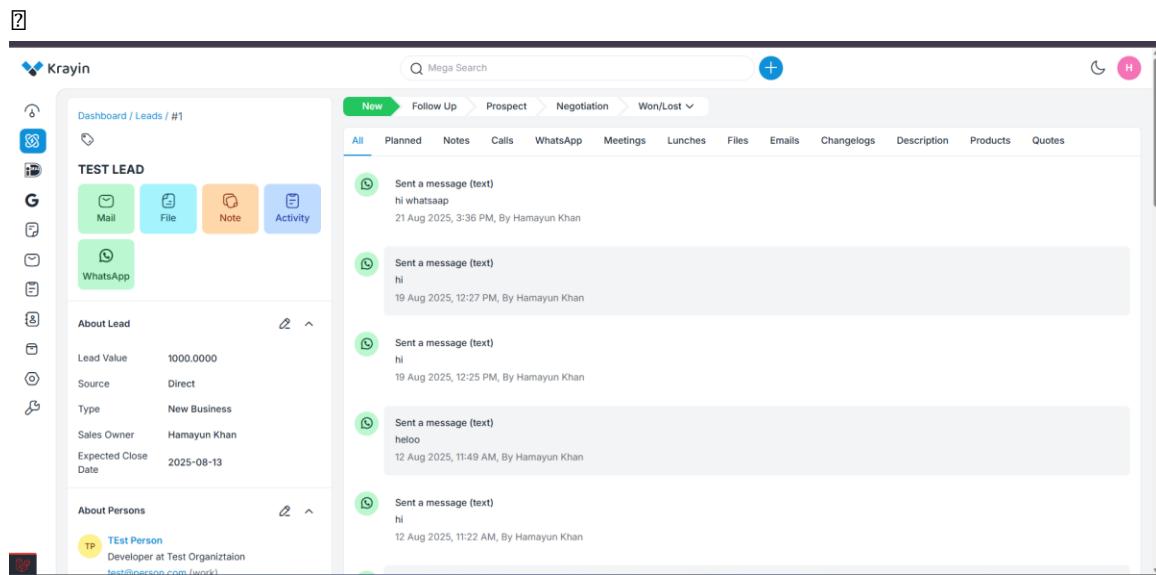
The screenshot shows the Krayin CRM interface. On the left, the 'TEST LEAD' record is displayed with various details like Lead Value, Source, and Type. On the right, a list of WhatsApp messages is shown, and a modal window is open for sending a new message, with 'Text' selected as the message type.

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.



The screenshot shows the Krayin CRM interface with the same lead record and message list as the previous screenshot, but with a different message content in the list.