

# Steps to get started and configure WhatsApp-enabled business number

In order to get started with WhatsApp messaging using SMS-Magic, the following are the steps you would need to complete:

- First, reach out to our sales team on [sales@screen-magic.com](mailto:sales@screen-magic.com) to know the prerequisites of enabling WhatsApp messaging capabilities with SMS-Magic. You would need to fill in the use case form and get it approved from WhatsApp.
  - You can bring your own WhatsApp-enabled business number (BYOP) OR get one procured through SMS-Magic
  - You can bring your WhatsApp registered templates OR get in touch with our Support Team who can help you get your Message Templates approved and registered with WhatsApp. You can check detailed information on creating WhatsApp templates in further sections.
  - For existing SMS-Magic customers, we will be tagging your existing templates with all channels so that you need not have to perform an additional step to use them for WhatsApp Messaging
  - Please note that the entire process of registering your WhatsApp-enabled business number and templates takes around 4 weeks
  - You can get your WhatsApp enabled business number and registered message templates configured with your account with the help of our support team ([care@screen-magic.com](mailto:care@screen-magic.com))
  - You are now ready to send your first WhatsApp Message
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## Supported Message Types on WhatsApp

**Text Messages** – These include text templates and free text messages that you can send to any recipient as a part of WhatsApp “session messages” i.e. these messages can get delivered only if the recipient is falling inside a 24 hr active window.

**Media Messages** – These include media messages that you can send to any recipient as a part of WhatsApp “session messages” i.e. these messages can get delivered only if the recipient is falling inside a 24 hr active window. Supported media messages include Images, Videos, Audio, Document files with a maximum size of 2.5MB.

**MTM Templates**- These are registered and approved text and media templates. Media messages can include Images, Videos, PDF documents, or Location. Businesses must use an MTM template if more than 24 hours have elapsed since their recipient last responded to them. These messages can also be sent if the recipient is falling inside the 24hr active window.

For Salesforce, only text registered templates are supported. For Zoho and SMS-Magic Web Portal, text and media registered templates are supported.

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## Compliance with WhatsApp Messaging

### **1. WhatsApp guidelines on How to Get Opt-in for WhatsApp**

As per WhatsApp [Business Guides](#), businesses can obtain opt-in in a multitude of ways, both on and off WhatsApp. Ultimately, WhatsApp wants to help people receive useful information from businesses they want to hear from. Opt-in methods such as via your website, interactive voice response (IVR) flows, or in a WhatsApp thread are acceptable.

Businesses must follow the below requirements when obtaining opt-in:

- Businesses must clearly state that a person is opting in to receive messages from the business over WhatsApp
- Businesses must clearly state the business' name that a person is opting in to receive messages from
- Businesses must comply with applicable law

Also as mentioned in the [WhatsApp Business Policy](#),

- In order to initiate a WhatsApp message to a person, businesses must first receive opt-in permission confirming that they wish to receive future messages from you on WhatsApp. The opt-in must (a) clearly state that the person is opting in to receive messages from you over WhatsApp and (b) clearly state your business' name.
- Businesses are solely responsible for determining the method of opt-in, that you have obtained opt-in in a manner that complies with laws applicable to your communications, and that you have otherwise provided notices and obtained permissions that are required under applicable law.
- Businesses must respect all requests (either on or off WhatsApp) by a person to block, discontinue, or otherwise opt out of communications from you via WhatsApp, including removing that person from your contacts list.

### **2. SMS-Magic Compliance with WhatsApp**

Businesses capturing the recipient's explicit WhatsApp opt-ins as per the WhatsApp guidelines mentioned above can use our out-of-box compliance configuration feature to set up and enforce compliance checks for WhatsApp outbound messages.

#### **Notes:**

- Consent capturing and enforcing the compliance check for WhatsApp

messaging is applicable on top of 24 hr session window handling done at the recipient level.

- The system will apply a compliance check for all the WhatsApp messages sent from UI as well as non UI sources using registered MTM templates.
- The system will not apply Compliance checks for free-flowing text messages as well as messages sent using non-registered templates. It will be handled by the 24 hr session window check at the recipient level as already explained in the sections above.
- Consent mode selection ('Consent Required' Or 'Consent Not Required' Or 'Consent Not Applicable') made across Interactive, Bulk, and Automated messaging sources is applicable only for channel SMS. Compliance enforcement for the WhatsApp channel will only check the 'Consent Status' against the recipient for all the WhatsApp messages sent from UI as well as non UI sources using registered MTM templates for Salesforce, Zoho, and SMS-Magic Web Portal.
- For Salesforce, auto appending of configured opt-out instruction text will only work for WhatsApp free-flowing text messages as well as messages sent using non-registered templates. It won't be auto appended for the WhatsApp messages sent using registered MTM templates.