

MESSAGING CHANNEL

WhatsApp

via the official Meta Cloud API

Sayl CRM · Channel Setup Guide · v1.0

What this is

Connect a real WhatsApp Business number to Sayl CRM through Meta's Cloud API. Customers chat with you on the WhatsApp they already have; messages land in your shared inbox; replies go back over WhatsApp with delivery and read receipts.

Two onboarding paths exist. *Dedicated* — you bring your own Meta App and WhatsApp Business Account; the most flexible option and the main path covered below. *Shared* — you skip Meta entirely and your Sayl platform operator adds your number to the platform's WABA. The shared path is much shorter for you (no Meta credentials to manage) but is subject to graduated daily caps, platform-wide marketing-velocity limits, and requires KYB + AUP acceptance. See step 5 for the shared flow.

Before you start

- **For Dedicated mode:** a verified business on business.facebook.com with WhatsApp Business Platform onboarding completed (a phone number reserved for the API — it can no longer be used in the WhatsApp mobile app).
- **For Shared mode:** just the phone number you want to use, in E.164 format (e.g. `+201001234567`). No Meta account, no app, no token.
- Owner-level access to your Sayl CRM workspace.

Setup

1 Get the four values you need from Meta (Dedicated only)

Skip this step if you're going Shared. From WhatsApp Business Manager, collect: **WhatsApp Business Account ID (WABA)**, **Phone Number ID** (this is the routing key, not the phone number itself), a **permanent System User access token** with `whatsapp_business_messaging` + `whatsapp_business_management` permissions, and the Meta **App Secret**.

2 Add the line in Sayl CRM (Dedicated)

Open **Settings** → **Channels** → **WhatsApp** → **Add Line**, keep the default *Use my own Meta App* tab selected, and paste the display name, phone number, Phone Number ID, and the permanent access token. Pick the inbox to route messages into. The token is encrypted at rest with AES-256-GCM — never written to logs.

3 Tell Meta where to send webhooks (Dedicated)

In Meta App Dashboard → **WhatsApp** → **Configuration** → **Webhooks**, set *Callback URL* to `https://<your-sayl-host>/webhook` and *Verify token* to the value your platform operator configured. Subscribe to `messages`, `message_status`, and `message_template_status_update`.

4 Run the connectivity test (Dedicated)

Back in Sayl, click *Test send* on the line. Sayl pushes a small `hello_world` template to a phone number you specify. If it arrives, your outbound path is good.

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Shared mode — the no-Meta alternative

If you don't have your own Meta App, skip steps 1–4 and instead: open **Settings** → **Channels** → **WhatsApp** → **Add Line** and switch to the *Use Sayl's shared infrastructure* tab. Enter your business name, the phone number you want added (E.164 format), pick the inbox, and submit. The request lands in your platform operator's review queue. They add the number to Sayl's WABA in Meta Business Manager, then approve with the resulting credentials — at which point the line shows **Active** and you can send. While pending, the line shows a *Pending review* badge; if rejected, the reason is shown inline so you can address it and resubmit.

Shared-mode lines are subject to: graduated daily broadcast caps (50 → 250 → 1000 recipients over 21 days), a per-recipient marketing-template velocity cap (3/recipient/7 days, platform-wide), and a quality-rating freeze on broadcasts when Meta drops the line to RED. KYB business verification and AUP acceptance are required before sending — both are guided flows under *Settings* → *Compliance*.

Test it

Send a real WhatsApp message from your personal phone to the connected business number. It should appear in the Sayl inbox in under 5 seconds. (Shared mode: only after your operator has approved the request and the line shows Active.)

Troubleshooting

Problem	Likely cause	Fix
Webhook delivery succeeds at Meta but nothing appears in Sayl.	HMAC mismatch. The Meta App Secret on the Sayl side doesn't match the one signing the webhook.	Copy the App Secret again from your Meta App and ask your platform operator to update it. Look for <code>WebhookSignatureVerifier</code> warnings in the Sayl server log to confirm.
Outbound returns <code>(#131047) Re-engagement message .</code>	You're sending free-form text more than 24h after the customer's last message.	Use a pre-approved template instead — pick one in <i>Broadcasts</i> → <i>Templates</i> .
Shared-mode line stuck in <i>Pending review</i> for more than a business day.	Approval requires platform-operator action — adding the number to Sayl's WABA in Meta Business Manager and entering the resulting Phone Number ID + Access Token.	Contact your operator's support channel. They can see your request under <code>/admin/whatsapp-lines</code> . You can also cancel the request and resubmit if you've changed any details.
Shared-mode line was rejected.	Platform operator declined the request — the rejection note from the operator is shown inline on the line card under <i>Settings</i> → <i>Channels</i> → <i>WhatsApp</i> .	Read the operator's rejection note, address the issue (often: prove ownership of the number, or fix business-name mismatch), delete the rejected request, then resubmit.

Problem	Likely cause	Fix
Send blocked with <code>SendBlockedException.LineNotProvisioned</code>	Trying to send via a Shared-mode line that isn't yet Approved.	Wait for operator approval. The line must show provisioning status APPROVED and overall status ACTIVE before any send (template or free-form) is allowed.

Need the full multi-channel reference? Download the [Sayl CRM Integration & Configuration Guide](#).