Integrations – WhatsApp configuration

WhatsApp integration with Qargo: this guide covers the requirements and steps to set up the integration.

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🔔 The integration requires the company's own **WhatsApp business account**.

Configure the WhatsApp integration

This guide explains how to set up a WhatsApp Business Account through the embedded signup flow in the Qargo TMS platform. This process allows a transport company to:

- Create and manage its own WhatsApp Business Account (WABA)
- Send messages to drivers and manage communication at scale
- Keep full ownership and control of its WhatsApp business assets

Time required: Approximately 15–30 minutes

Read each section carefully to ensure a successful setup.

▶ **Prerequisites**

If no phone number is available that is not linked to an existing WhatsApp account, the recommendation is to get an eSIM (if the phone supports it). The eSIM must have a phone number attached to it; data-only eSIMs won't work. Another option is to get a second physical SIM.

3. Business information ready

- Legal business name
- Business address
- Business website URL
- Business email address
- Business category (e.g., "Transportation/Logistics")

4. Business verification documents (for full access)

- Business registration documents
- Tax identification numbers
- Utility bills or bank statements (for address verification)

5. Technical requirements

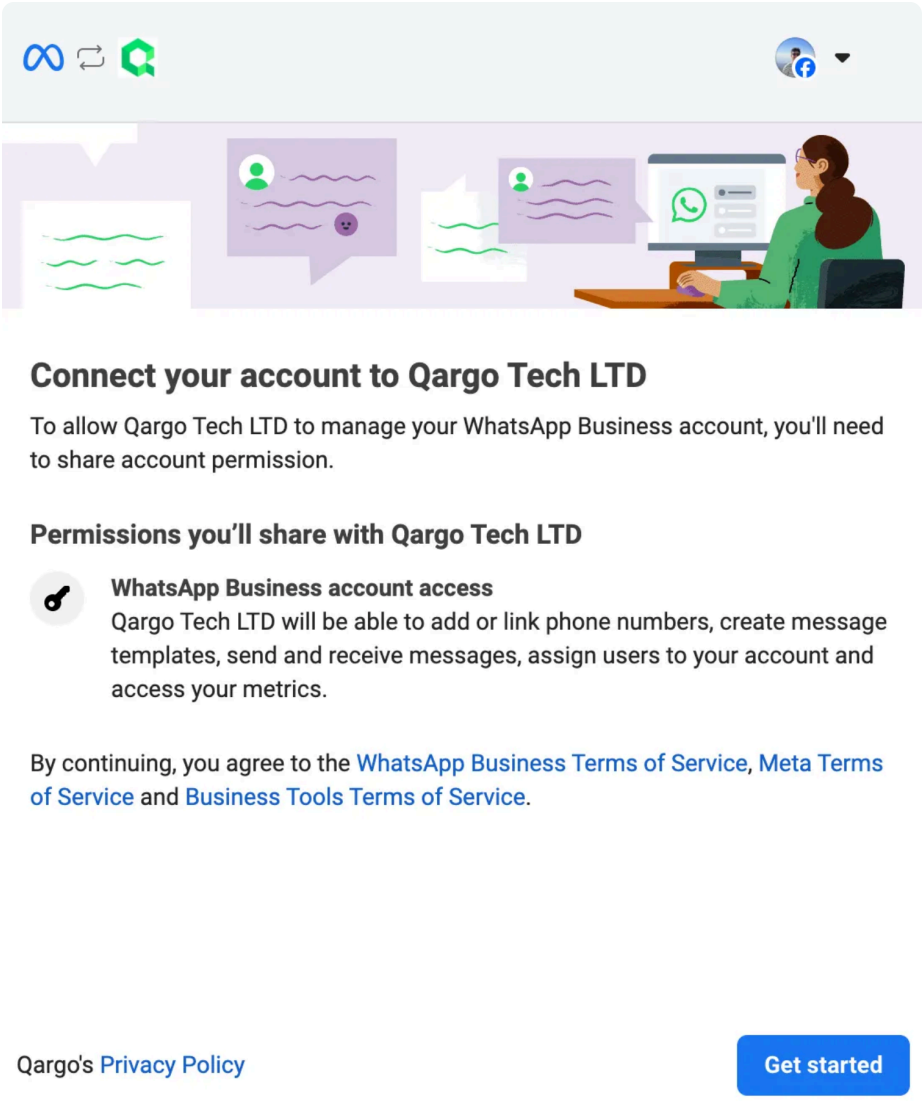
- Modern web browser (Chrome, Firefox, Safari, or Edge)
- Stable internet connection
- Pop-up blockers disabled for the signup process :::

▶ **Pre-onboarding checklist**

▶ **Step-by-step embedded signup process**

Step 2: Authenticate with Meta

1. **Log in to Facebook/Meta**
   - Enter the Facebook credentials
     - Two-factor authentication might be required
   - Use the account that has admin access to the Meta Business Manager
2. **Grant permissions**
   - Click **"Get Started"** to connect the account



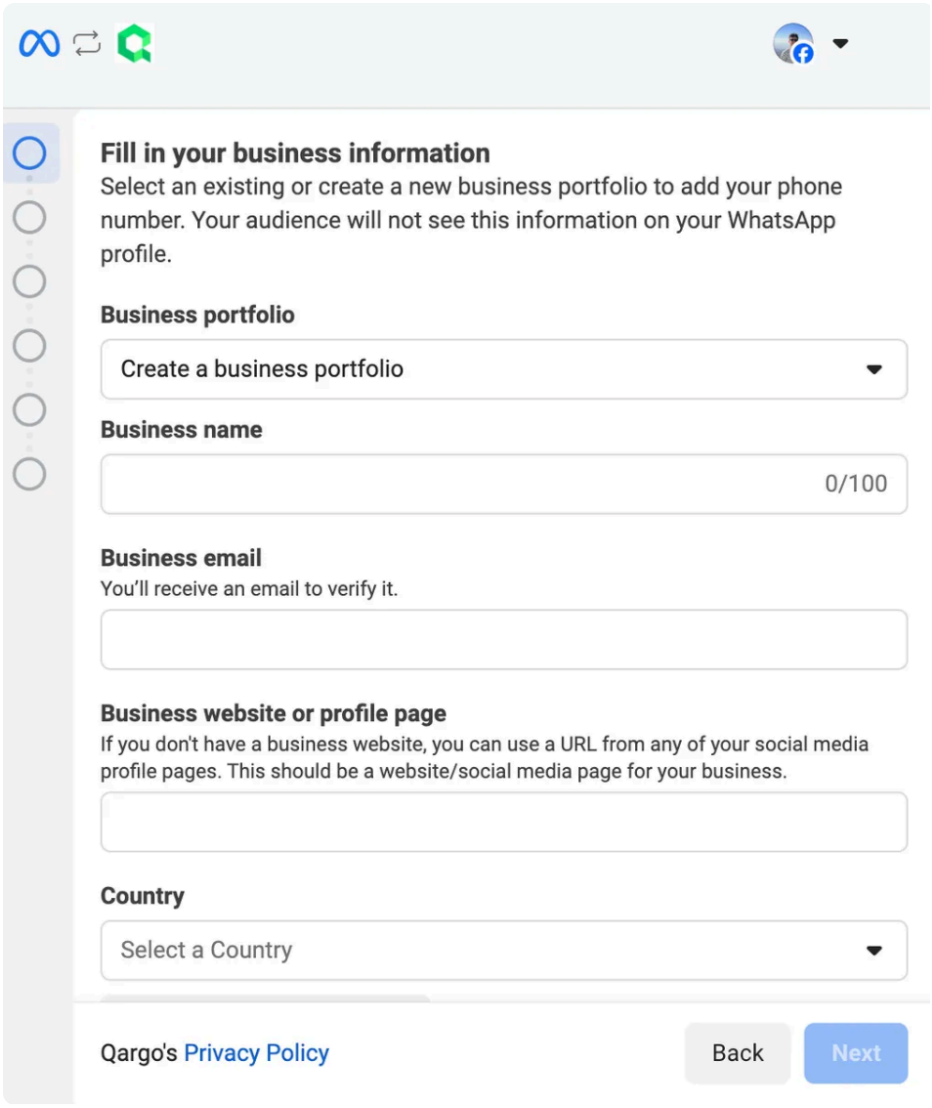
   - Review the requested permissions
   - Click **"Continue"** to proceed

> ‼️ **Important** ‼️
> Do not keep the embedded signup window open for more than 1 hour, as the session expires.

Step 3: Select or create a business portfolio

1. **Choose a business portfolio**

   - Select the existing Meta Business Portfolio from the dropdown
   - Or create a new one for a first-time setup



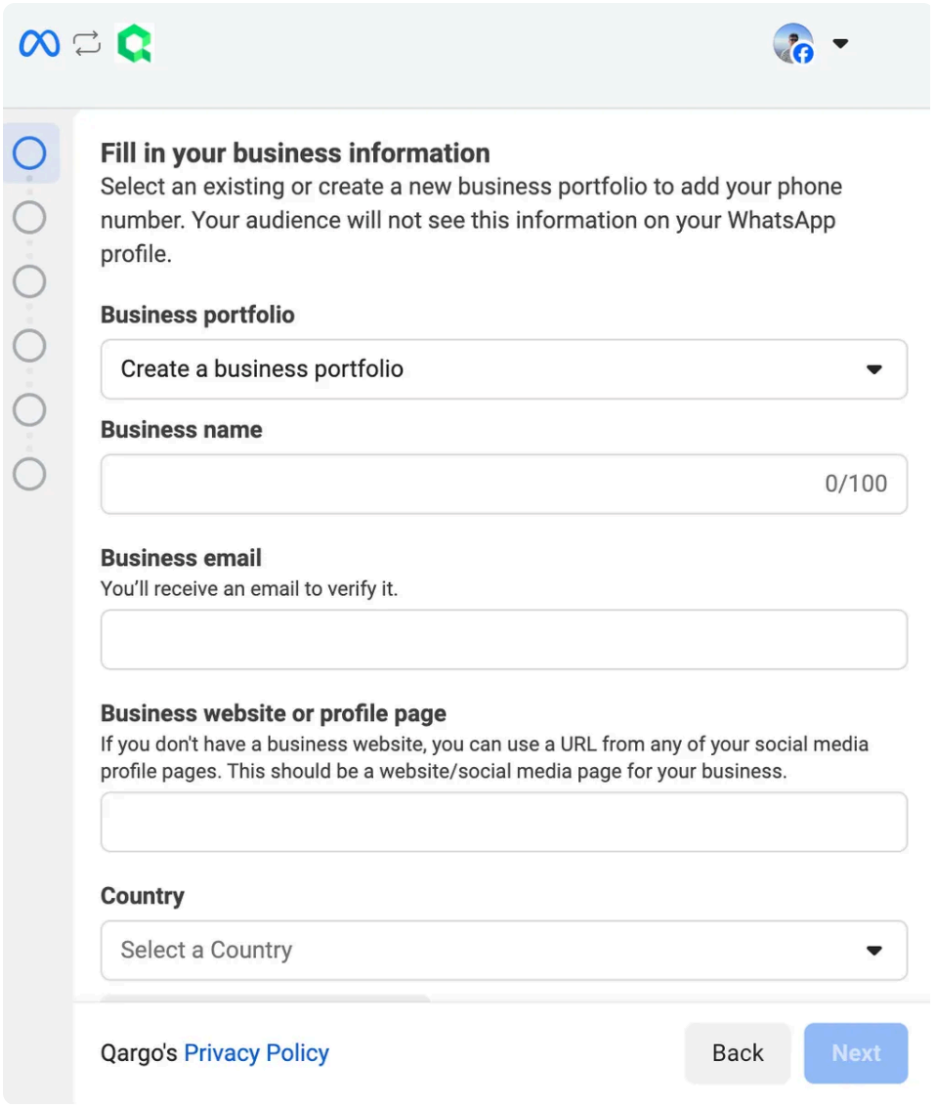
Critical: Choose the Business Manager carefully, as it cannot be changed after the number is registered.

Step 4: Set up the WhatsApp Business Account

There are two options:

Option A: Create a new WABA (first-time users)

1. Select **"Create a new WhatsApp Business Account"**
2. Enter the following information:
   - **WhatsApp Business Account Name**: The company name
   - **WhatsApp Business Display Name**: The name visible to customers
   - **Category**: Select "Transportation" or the most relevant category
3. Click **'Next'**



Option B: Use an existing WABA (returning users)

1. Select the existing WABA from the dropdown
2. Create a new WhatsApp Business Profile for the new number
3. Click **'Next'**

Step 5: Add and verify the phone number

1. **Enter the phone number**
   - Use international format with the country code (e.g., +1234567890)
   - Do not include spaces or special characters
2. **Choose a verification method**
   - **SMS** (recommended): A 6-digit code is sent by text message
   - **Voice call**: A phone call provides the verification code
3. **Enter the verification code**
   - Enter the 6-digit code received
   - Click **"Verify"** to confirm

Troubleshooting: If the code does not arrive within 5 minutes, try the alternative verification method.

Step 6: Configure the business profile

1. **Business information**
   - Upload a business logo (recommended: 640x640px, PNG or JPG)
   - Add a business description (up to 512 characters)
   - Select business hours (optional)
   - Add the business website URL
2. **Contact information**
   - Confirm the business email
   - Add additional contact methods if needed
3. **Review and confirm**
   - Review all entered information
   - Click **"Finish"** to complete setup

Step 7: Complete the integration setup

After Meta verification, the user is redirected back to the TMS platform:

1. **Confirm the phone number**
   - Check that the phone number is displayed correctly
2. **Create a PIN**
   - Set a 6-digit PIN for future administrative actions

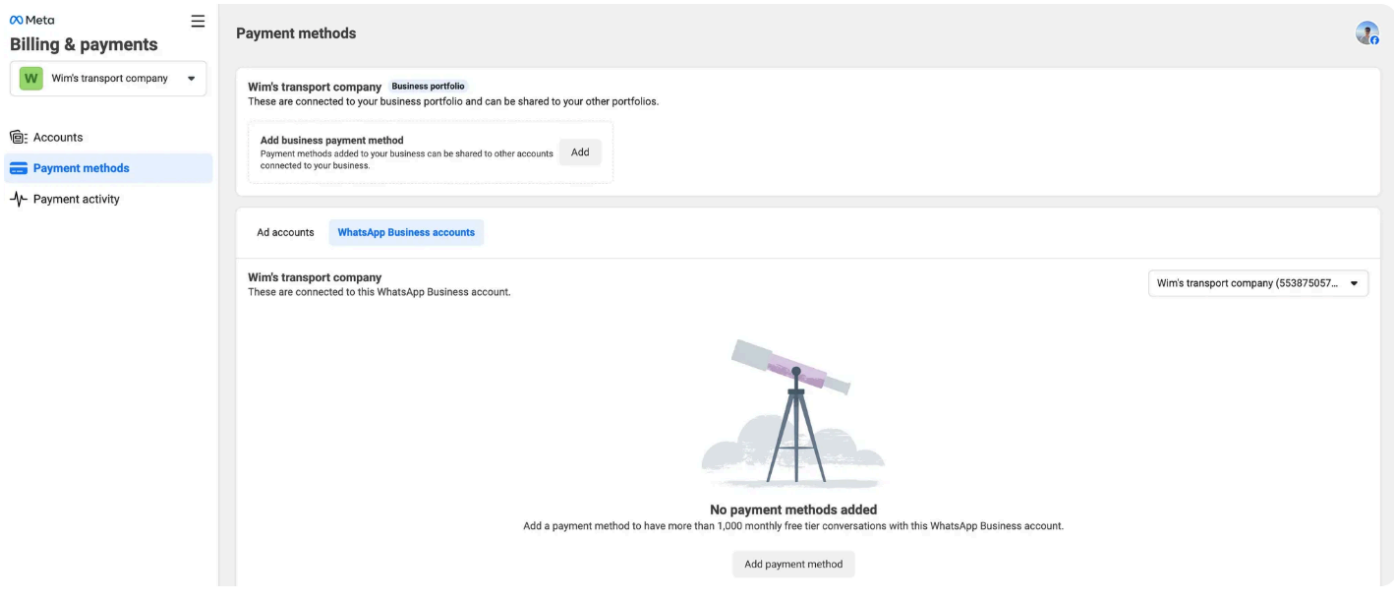
> ‼️ **Important** ‼️
> Store this PIN securely: it cannot be retrieved later

Re-authenticating requires the same PIN chosen here, so it is important to remember it.

To change the two-step verification PIN on a WhatsApp Business account, open WhatsApp Manager, navigate to **Account tools > Phone numbers**, and then select the specific phone number. From there, go to the **Two-step verification** settings and choose the **Change PIN** option :::

▶ **Post-onboarding setup**

To send template messages that open conversations with drivers, a **valid payment method** must be added to the WhatsApp business account. This can be done in the Facebook billing hub: https://business.facebook.com/billing_hub. Under **Payment methods > WhatsApp Business accounts**, select the business account:



2. Complete business verification (within 30 days)

To unlock full messaging capabilities:

1. Go to Meta Business Manager: https://business.facebook.com
2. Navigate to **Business Settings > Business Info**
3. Click **"Start Verification"**
4. Submit the required documents:
    - Business registration certificate
    - Tax documents
    - Utility bills or bank statements

📚 Until verification is complete, the account is limited to 250 unique conversations per day.

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▶ **Troubleshooting**

▶ **FAQs**

Message drivers through WhatsApp in Qargo