

Grandstream Networks, Inc.

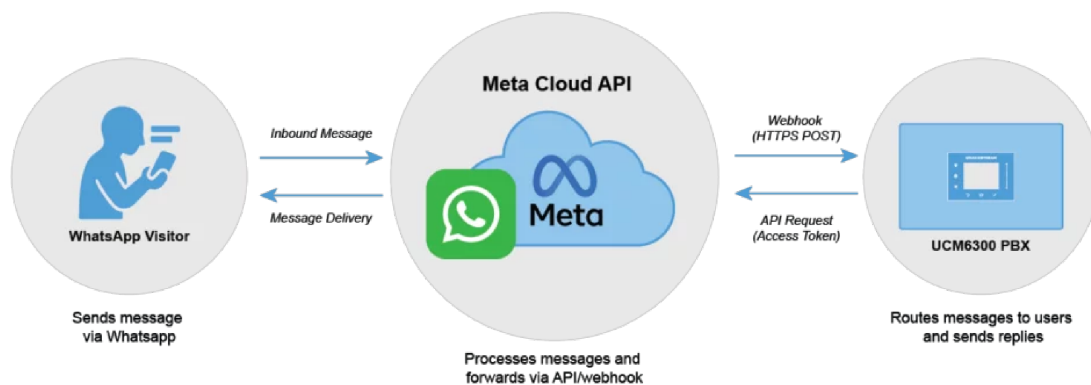
WhatsApp Business Integration



INTRODUCTION

The UCM WhatsApp Integration allows UCM administrators to centrally configure WhatsApp Business accounts for all Wave Desktop users. Once configured on the UCM, extension users can receive and respond to WhatsApp messages directly from the Wave Desktop application without performing any individual client-side setup. Additionally, the integration can incorporate chatbot flows, enabling automated message handling, predefined interaction scenarios, and improved response efficiency for common user inquiries.

This guide provides a step-by-step configuration workflow covering the Meta (WhatsApp Business) side, the UCM configuration, and the Wave Desktop client setup.



WhatsApp Integration Overview

Note:

WhatsApp integration via UCM is supported on Wave Desktop only. Wave Web and Wave Mobile applications are not supported.

PREREQUISITES

Before attempting this integration, ensure the following requirements are met:

WhatsApp Business & Meta Requirements

- A phone number to be used with the WhatsApp Business API.
- The number must not be registered to any existing WhatsApp account (personal or business app).
- Ability to receive SMS/voice OTP for number verification.
- A Meta Business Portfolio with administrative access.
- A Meta Developer account registered at <https://developers.facebook.com>

Notes:

- If your phone number is currently in use, it must be unregistered before proceeding. For more information, please refer to: <https://faq.whatsapp.com/>
- Meta provides a test phone number, which allows sending free messages for up to 90 days. Using a production number is subject to [Meta's messaging limits and pricing](#).
- It is recommended to use a test phone number for initial Quickstart verification.

UCM & Network Requirements

- A UCM6300/A Series or CloudUCM running a compatible firmware version (see [SUPPORTED DEVICES](#) section).
- The UCM must be publicly reachable via HTTPS with a valid CA-signed TLS/SSL certificate.

Notes:

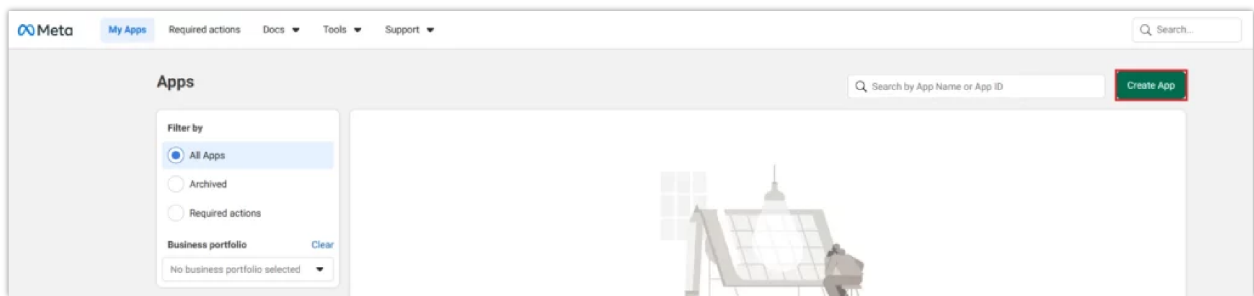
- Self-signed certificates are not supported by the WhatsApp webhook service.
- It is recommended to use the UCM RemoteConnect address (e.g., <https://xxx.a.gdms.cloud>) to ensure compliance with Meta webhook requirements.

WHATSAPP CLOUD API SETUP (META SIDE)

This section covers all the Meta-side configuration required before the UCM can be set up. Complete all steps in this section first. By the end, you will have your **Phone Number ID** and a **permanent access token** ready to paste into the UCM portal.

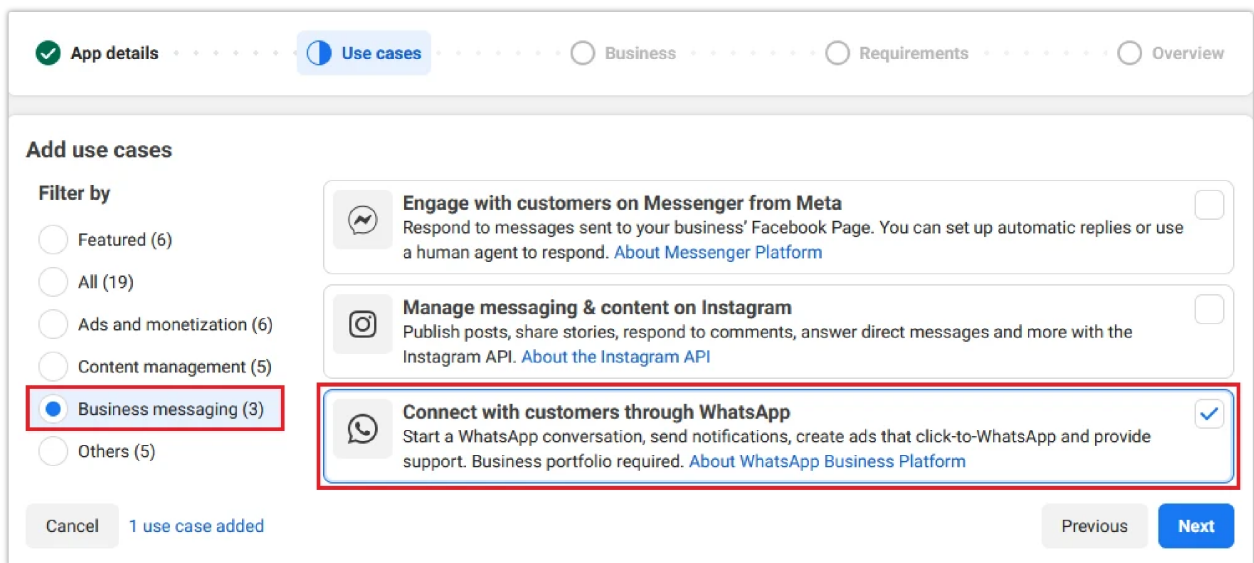
Create Meta App and Configure WhatsApp

1. Open [Meta for Developers](#) and sign in (If you don't have a Meta developer account, complete the registration process).
2. Click **Create App**.



Meta for Developers App Dashboard

3. Choose a name for your app.
4. Under the *Business messaging* app category, choose the **Connect with customers through WhatsApp** use case.



Add Use Cases Screen During App Creation

4. Select an existing Meta Business Portfolio or follow the prompts to create a new one, then complete app creation.

Which business portfolio do you want to connect to this app?

Connect a verified business portfolio to your app to get access to third-party user and business data from other business portfolios and publish this app. You can connect an unverified business portfolio or choose to add one later, but will be required to complete verification to gain data access.

☒ CompanyX

Want to connect a new business portfolio? [Create a business portfolio.](#)

Cancel Previous Next

Business Portfolio Selection

5. In the left sidebar, click **Use Cases** (pencil icon), then click **Customize** under the Connect with customers through WhatsApp use case.

Meta My Apps Required actions Docs Tools Support

UCMIntegration

Dashboard

Required actions

Use cases

Facebook Login for Busi...

Testing

Publish Unpublished

Use cases

Select each use case to customize how it works and add extensions for more functionality.

Connect with customers through WhatsApp

Start a WhatsApp conversation, send notifications, create ads that click-to-WhatsApp and provide support. Business portfolio required. [About WhatsApp Business Platform](#)

Add use cases

Customize

Meta App Use Cases Sidebar

6. In the **Quickstart/API Setup** section, locate and copy the **Phone Number ID** displayed for the test number (or your own number if already added). Save this value as it will be required during UCM configuration.

Meta My Apps Required actions Docs Tools Support

Use cases > Customize

Customize use case

Customize use case settings and permissions to make your app work the way you want it to.

Connect on WhatsApp

Permissions and features

Quickstart

API Setup

Configuration

Tech Provider onboarding

Resources

Access Token

Clicking **Generate access token** will allow you to select one or more WhatsApp Business accounts to generate temporary tokens for.

Copy Generate access token

Send and receive messages

Configure how you will send and receive messages from your WhatsApp Business account.

Step 1: Select phone numbers

Test phone numbers allow you to send free messages for 90 days. You can use your own phone number, which is subject to limits and pricing. [About pricing](#)

From

Test number: +1 555 123 4567

Phone number ID: 112173 WhatsApp Business Account ID: 128027

To

Select a recipient phone number

API Setup Page showing Phone Number ID

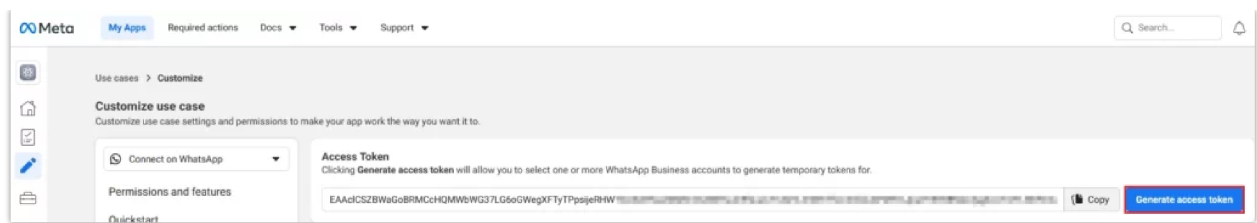
Note:

The API Setup page also displays a temporary access token. This token can be used for the integration, but it expires within 24 hours and is intended for initial testing only. It is recommended to use a permanent token, which will be generated in Step 4.

Send a Test Message (Optional)

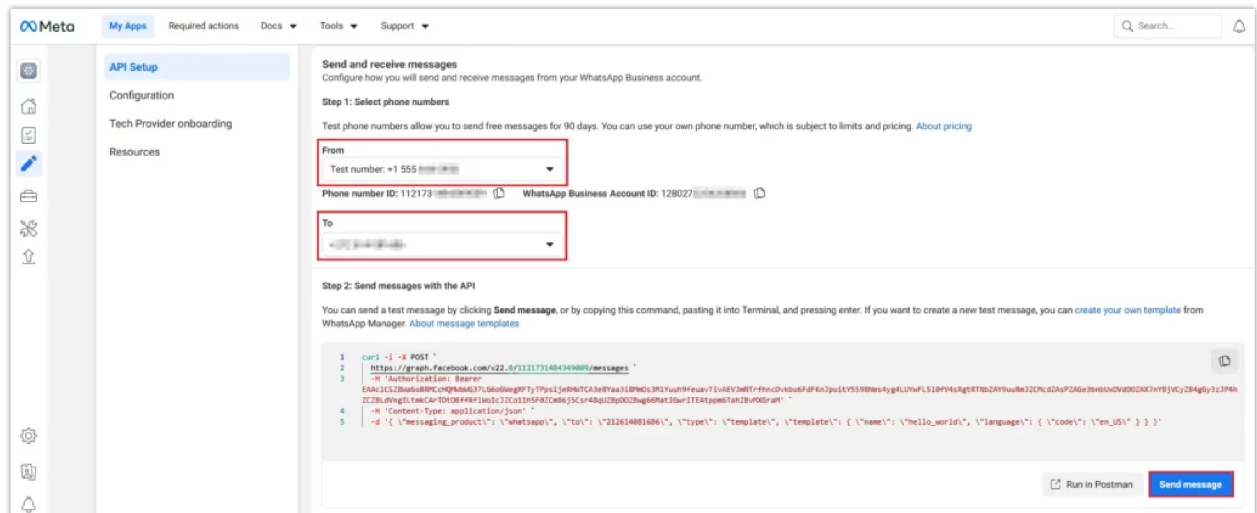
Before proceeding to production configuration, it is recommended to verify that your Meta app is correctly connected to the WhatsApp Cloud API by sending a test message.

1. On the API Setup page, generate a temporary access token.



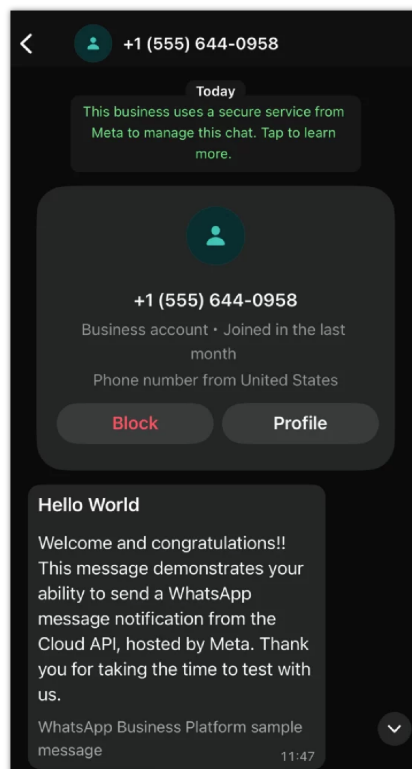
Generating a Temporary Access Token

2. Ensure the test phone number is selected in the *From* field.
3. In the *To* field, click Manage phone number list and add a personal WhatsApp number to receive the test message. Up to 5 recipient numbers can be added during testing.
4. Click **Send message**. Meta will send a preconfigured *hello_world* template message to the selected number.



Send and Receive Messages Section

5. Confirm the message is received on the target device.



Test Message Received on Device

Note:

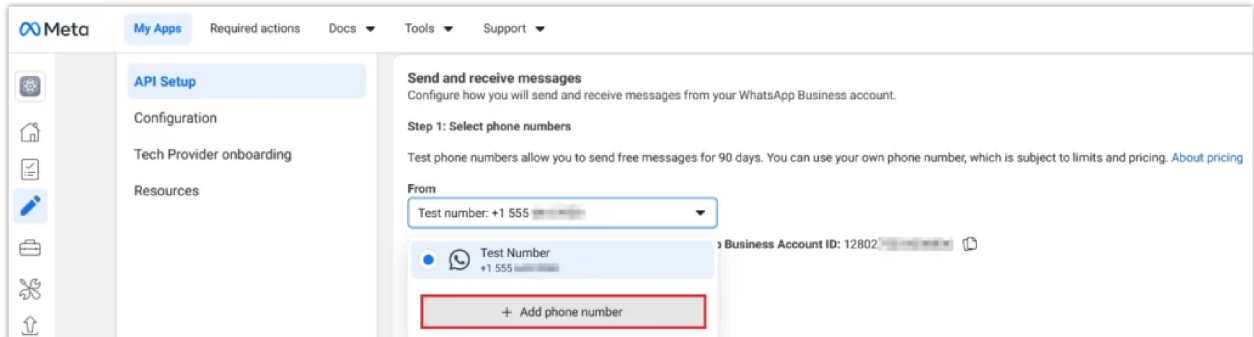
Test messages sent using the Meta-provided test number are free of charge and do not require a payment method. Sending messages from a production phone number is subject to Meta's conversation-based pricing.

Add a Production Phone Number (Optional)

Skip this step if you wish to use the Meta-provided test number for this integration, or if your production number is already added and visible in the *From* drop-down on the API Setup page.

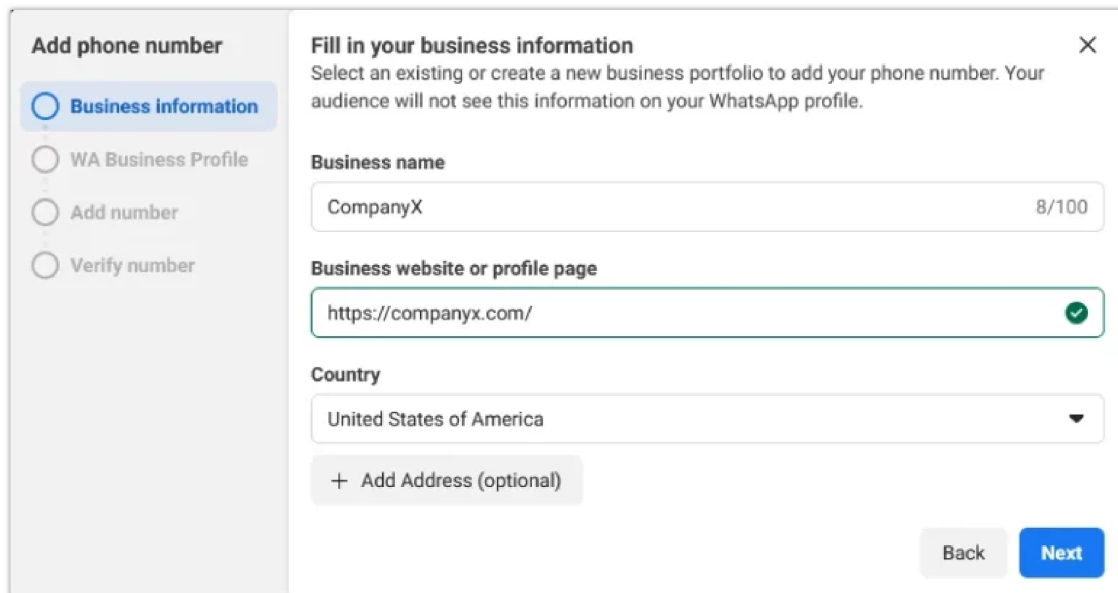
If you need to register a new production phone number:

1. On the API Setup page, click **Add phone number** under the *From* field.

The screenshot shows the Meta API Setup interface. On the left, there's a sidebar with 'API Setup' selected. The main area is titled 'Send and receive messages' and 'Step 1: Select phone numbers'. It explains that test numbers allow sending free messages for 90 days. A 'From' dropdown menu is shown with 'Test number: +1 555' selected. Below it, a 'Test Number' card is visible. A red box highlights the '+ Add phone number' button at the bottom of the 'From' field.

Adding a Production Phone Number

2. Enter your business display name and business category, then click Next.

The screenshot shows the 'Add phone number' form. On the left, there's a sidebar with 'Business information' selected. The main area is titled 'Fill in your business information' and asks to select an existing or create a new business portfolio. It includes fields for 'Business name' (CompanyX, 8/100), 'Business website or profile page' (https://companyx.com/, with a green checkmark), and 'Country' (United States of America, with a dropdown arrow). There's also a '+ Add Address (optional)' button. At the bottom right, there are 'Back' and 'Next' buttons.

Business Information Form

3. Enter the phone number, select a verification method (SMS or Voice Call), and click Next.

Add phone number

- ☒ Business information
- ☐ WA Business Profile
- ☐ Add number
- ☐ Verify number

Create a WhatsApp Business profile ✕

This profile will show information about your business to people on WhatsApp. You can edit this information anytime by going to **Business assets** in Meta Business Suite **Settings** and selecting this WhatsApp account.

WhatsApp Business display name
Your display name should match your business name and adhere to WhatsApp Business display name guidelines. [Learn more about display name guidelines](#)

CompanyX

Timezone ⓘ
(GMT+01:00) Africa/Casablanca

Category
Shopping and Retail

Business description · Optional
Tell people about your business 0/512

Back Next

WhatsApp Business Profile Setup

4. Enter the verification code received and complete the process.

Add phone number

- ☒ Business information
- ☒ WA Business Profile
- ☐ Add number
- ☐ Verify number

Add your WhatsApp phone number ✕

Choose how you want to be identified when sending messages. [About existing numbers](#)

Phone number
US +1 (512) 665-9564

You'll receive a code to verify this number.

Choose how you would like to verify your number
If you are using a landline number, choose phone call.

☒ Text message ☐ Phone call

Back Next

Verify Production Number

4. Once added, the number will appear in the *From* drop-down. Select it and copy the associated Phone Number ID.

Important:

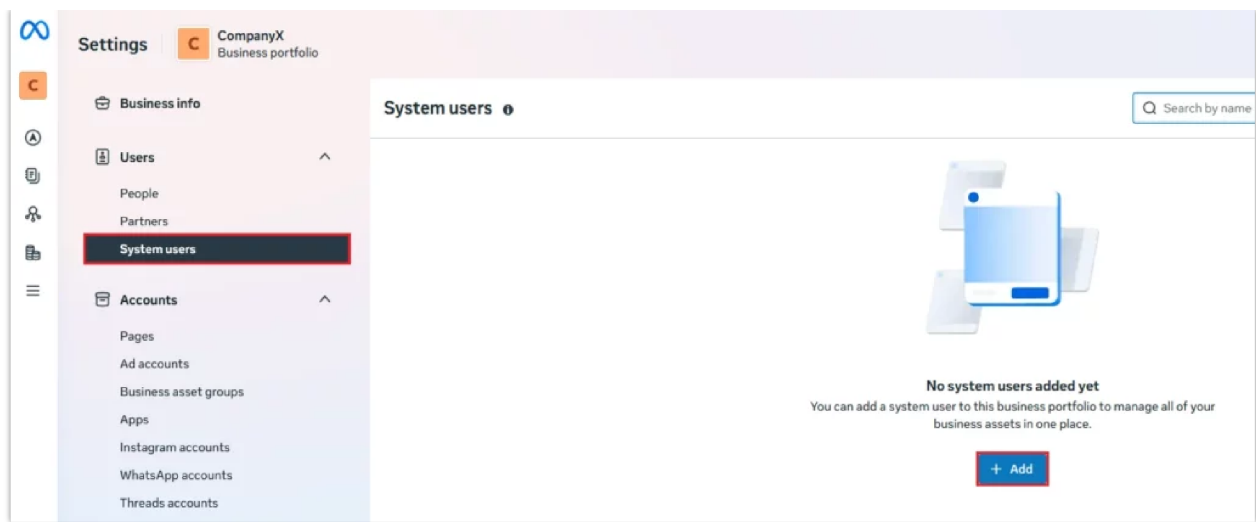
A phone number registered with the WhatsApp Business API cannot simultaneously be used in the WhatsApp Business mobile app. If the number is currently bound to a personal or business WhatsApp account, it must be unregistered before proceeding.

Generate a Permanent Access Token

This step creates a non-expiring System User token that will be used for all ongoing UCM to WhatsApp communication.

Create a System User

1. Open [Meta Business Settings](#).
2. In the left sidebar, navigate to **Users**→**System Users** and click Add.



System Users Page in Meta Business Settings

3. Enter a name for the system user (e.g., *UCM-WhatsApp*), set the role to **Admin**, and click **Create System User**.

Create system user

Enter a name for the system user you want to create below:

System user name

Wave

System user role

CompanyX will be the owner of this system user.

Admin

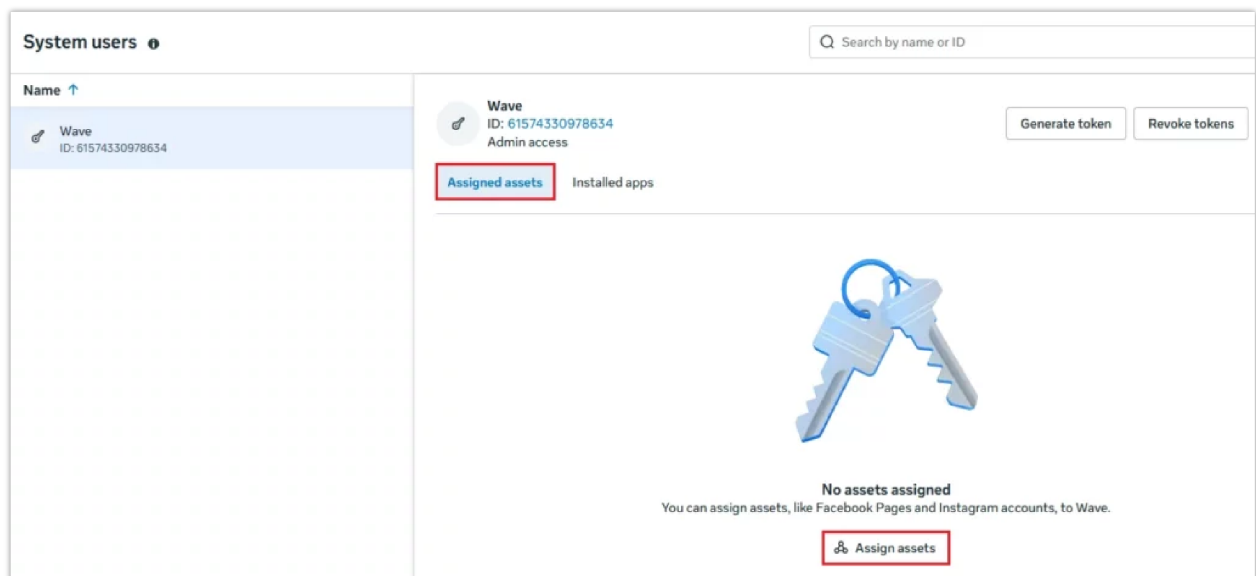
Cancel

Create system user

Create System User Dialog

Assign Assets to the System User

1. With the new system user selected, click **Assign Assets**.



Assign Assets to the System User

2. Under the Apps tab, select your Meta app and enable **Full Control**→**Manage app**. Click Save Changes.

Select assets and assign permissions

Select asset type ⓘ

Apps1

Pixels

Offline event sets

WhatsApp accounts

Datasets

Select assets

Search by name or ID

✓ Select all

✓

UCMIntegration

Assign permissions

Partial access

Develop app

Can change app settings, test the app and view analytics.

View insights

Can view app analytics.

Test app

Can test the app.

Full control

Manage app

Can manage roles, change app settings, test the app and view analytics.

1 asset selected

Cancel

Assign assets

Assigning App Permissions to the System User

- Under the WhatsApp Accounts tab, select your WhatsApp Business Account(s) and enable **Full Control**→**Manage WhatsApp Business Accounts**. Click Save Changes.

Select assets and assign permissions

Select asset type ⓘ

Apps1

Pixels

Offline event sets

WhatsApp accounts2

Datasets

Select assets

Search by name or ID

✓ Select all

✓

CompanyX

✓

Test WhatsApp Business Account

Assign permissions

Message templates (view only)

View and use message templates.

Message templates (view and manage)

Create, edit and delete message templates.

Phone numbers (view only)

View phone numbers and profiles.

Phone numbers (view and manage)

Add and delete the phone numbers. Manage their names, profiles, registrations and settings.

Manage phone numbers and message templates

Create message templates, add phone numbers, access metrics and send messages to customers.

Messages

Send and respond to messages as the WhatsApp account.

Full control

Everything

Manage all settings, assign users, view payment information and send messages.

3 assets selected

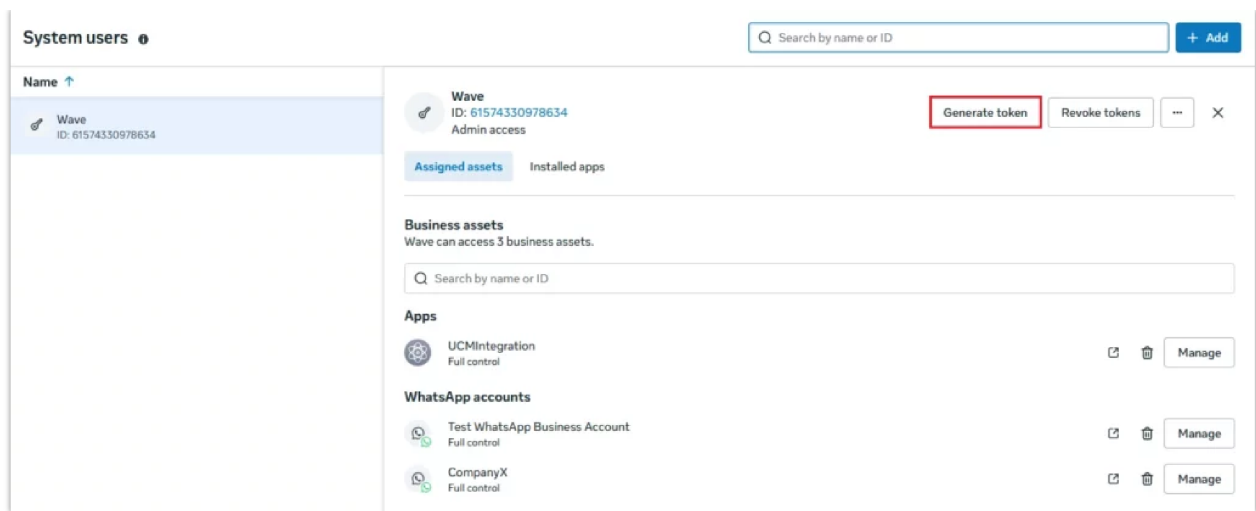
Cancel

Assign assets

Assigning WhatsApp Account Permissions to the System User

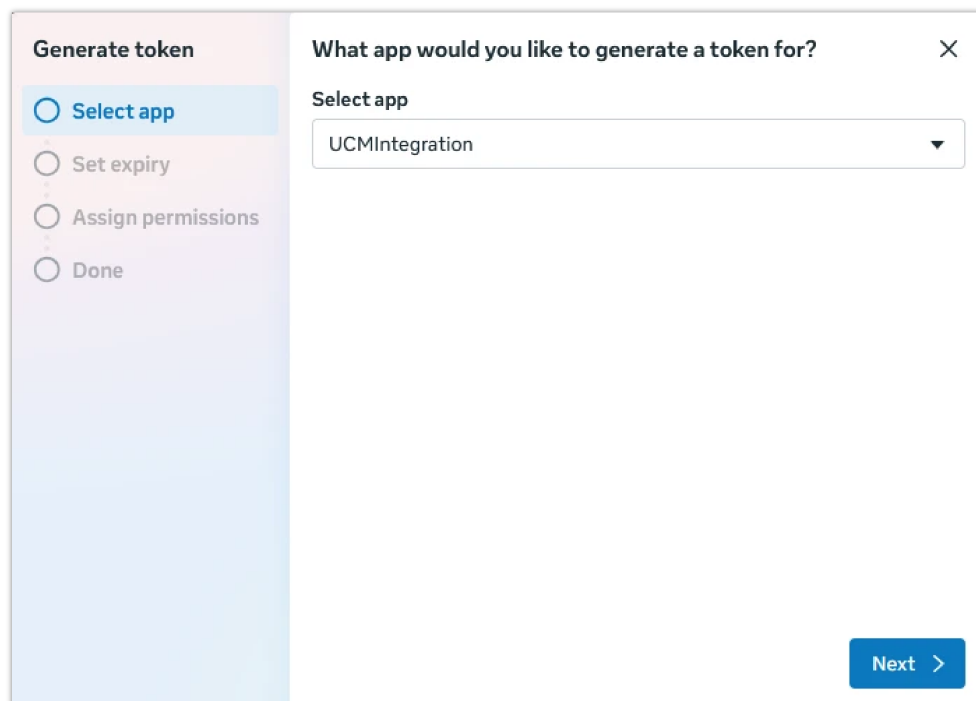
Generate the Token

- On the System Users page, select the system user you created and click **Generate token**.



Generate Token Button on System Users Page

2. In the pop-up, select your app from the drop-down list.



Select App for Token Generation

3. Select an expiration for the token; it is recommended to set it to 60 days.

Generate token

- ✓ Select app
- Set expiry**
- Assign permissions
- Done

When should the token expire?

Token expiry
Choose when this token will expire. [Learn about token expiry and refresh.](#)

☒ 60 days (recommended)

☐ Never

< Previous Next >

Set Token Expiry

4. Enable the following permissions:

- whatsapp_business_messaging
- whatsapp_business_management

Generate token

- ✓ Select app
- ✓ Set expiry
- Assign permissions**
- Done

What permissions will be granted to the app?

ⓘ If the permission(s) you're looking for are not available, an app admin may need to customize or add a use case to this app. [About use cases](#)

Select permissions

2 options selected

Q

- ☐ manage_app_solution
- ☐ whatsapp_business_manage_events
- ☒ whatsapp_business_management
- ☒ whatsapp_business_messaging

user.

< Previous Generate token

Assign Token Permissions

5. Click **Generate Token**.

6. Copy the token displayed and store it in a secure location. This token will not be shown again and remains valid indefinitely until explicitly revoked.

Generate token

- ✓ Select app
- ✓ Set expiry
- ✓ Assign permissions
- ☐ Done

Token created

Your token has been created and can now be used.

Token

EAAcICSZBWaGoBRB4AYHSo1axsNpMKXmHevNXBxV6
Copy

Done

Created Permanent Token

Important:

Anyone with access to this token can send and receive messages on behalf of your WhatsApp Business Account.

Retrieve the App Secret (Optional)

The App Secret is used by the UCM to cryptographically verify that incoming webhook events originate from Meta. Configuring it is optional but recommended for production deployments.

1. In the App Dashboard, go to **App Settings→Basic**.
2. Locate the **App Secret** field and click the *Show* icon.

App Secret Field

3. Copy the value and store it securely alongside your access token.

UCM CONFIGURATION

This section covers the configuration steps performed on the UCM via the Wave Management Portal. Before proceeding, ensure you have the following values from the Meta side configuration:

Value	Meta Page	Configuration Step
Phone Number ID	API Setup	Based on the number used for this integration: • Meta Test Number (Step 6 under Create Meta App and Configure WhatsApp) • Production Number (Step 5 under Add a Production Phone Number (Optional))
Permanent Access Token	System Users	Step 5 in Generate the Token
App Secret (optional)	App Settings	Step 3 in Retrieve the App Secret (Optional)

Configure the WhatsApp Account

To access the UCM WhatsApp integration page:

1. Log in to the UCM Wave Management Portal.
2. Navigate to **Advanced Messaging**→**Chatbot**→**WhatsApp**.
3. Click *Add WhatsApp*.



UCM Advanced Messaging Configuration

The Add WhatsApp dialog contains the following settings:

Add WhatsApp Account on the UCM

Parameter	Definition
Enable	Toggle to activate this WhatsApp account. When enabled, incoming messages to this account will be delivered to the assigned extension users.
Name	A display name for this WhatsApp Business account configuration.
Access Token	Paste the permanent access token generated in the Meta side configuration.
Webhook URL	Auto-generated by the UCM. Do not edit this field. Copy this URL using the copy button as it will be required in the next section to complete webhook registration on the Meta developer portal.
Client Secret	(Optional) Enter the App Secret retrieved in the Meta side configuration.
WhatsApp Phone Number	Enter the Phone Number ID saved from the Meta side configuration. Click the + button to add additional Phone Number IDs if needed. Messages received on any configured number will be delivered to the assigned Wave Desktop users.
Destination Number	Select the UCM extension(s) that will receive incoming WhatsApp messages. Multiple extensions can be assigned.
Display Sessions Taken by Other Agents	When enabled, this option allows agents to see sessions assigned to them, pending assignment, or assigned to another agent.
Enable Chatbot	Activates the automated reply function for this WhatsApp account. When enabled, a Chatbot selection field appears.
Chatbot	Select an existing configured Chatbot to handle incoming sessions automatically. For information on building Chatbot reply flows, refer to the Live Chat Chatbot Admin Guide.
Chatbot Mode	Defines how the Chatbot interacts with incoming sessions. See the Chatbot Mode table below.
Transfer to Agent	If the Chatbot cannot respond to a query, it sends a configured fallback message. When the visitor selects Transfer to Agent, a notification is sent to the assigned extension user.
After Hours Prompt	Configures automatic replies for defined time windows (start time and end time). Behavior differs depending on whether the Chatbot: • Chatbot enabled: The prompt is only sent when the visitor clicks <i>Transfer to Agent</i> or sends a message the Chatbot cannot answer. • Chatbot disabled: The prompt is automatically sent in reply to the visitor's first message received during the defined time window.

Two chatbot modes can be configured for the WhatsApp channel:

Mode	Behavior
Automatic Reception	All incoming WhatsApp sessions are handled entirely by the Chatbot. Assigned extension users receive no message notifications unless the visitor clicks Transfer to Agent or the Chatbot cannot answer the query.

Chat Assistance

The Chatbot automatically replies to the visitor while simultaneously notifying assigned extension users in real time, allowing agents to take over the conversation at any point.

Once this configuration is saved, assigned extension users will see the WhatsApp account listed in their Wave Desktop WhatsApp Business add-in. Extension users can view the configuration but cannot edit or modify it.

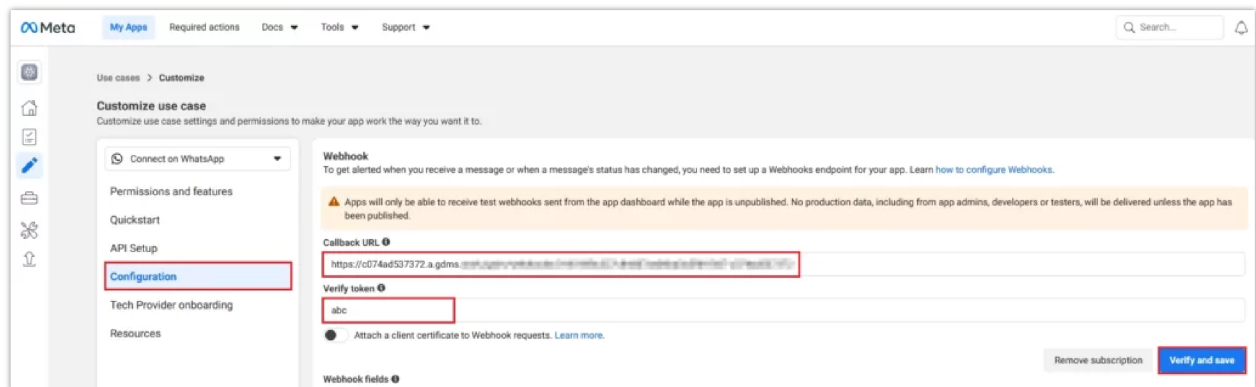
Configure the Webhook URL

This section completes the connection between Meta and the UCM by registering the Webhook URL copied from the UCM portal. Until this step is complete, the UCM will not receive incoming WhatsApp messages.

Register the Webhook URL

To register the Webhook URL retrieved from the WhatsApp configuration in the UCM page, please refer to the steps below:

1. Return to <https://developers.facebook.com> and open your app.
2. Use cases, customize
3. In the **Configuration** section, click **Edit**.
4. Paste the Webhook URL copied from the UCM portal into the **Callback URL** field.



Meta App Webhook Configuration

5. In the **Verify Token** field, enter any alphanumeric string of your choice. This value is used by Meta to confirm that the callback URL is reachable and responsive and does not need to match any value configured on the UCM.
6. Click Verify and Save. Meta will send a one-time verification request to the UCM. If the UCM is reachable and the URL is valid, the webhook will be confirmed.

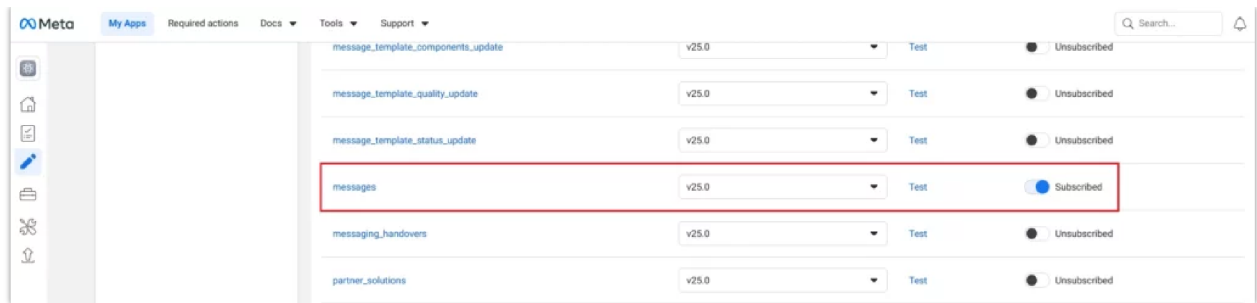
Note:

If verification fails, confirm that the UCM RemoteConnect address is reachable from the public internet and that the TLS/SSL certificate is valid and CA-signed. Self-signed certificates will be rejected.

Subscribe to Webhook Fields

After the Callback URL is verified, webhook field subscriptions must be configured to ensure the UCM receives the correct event types.

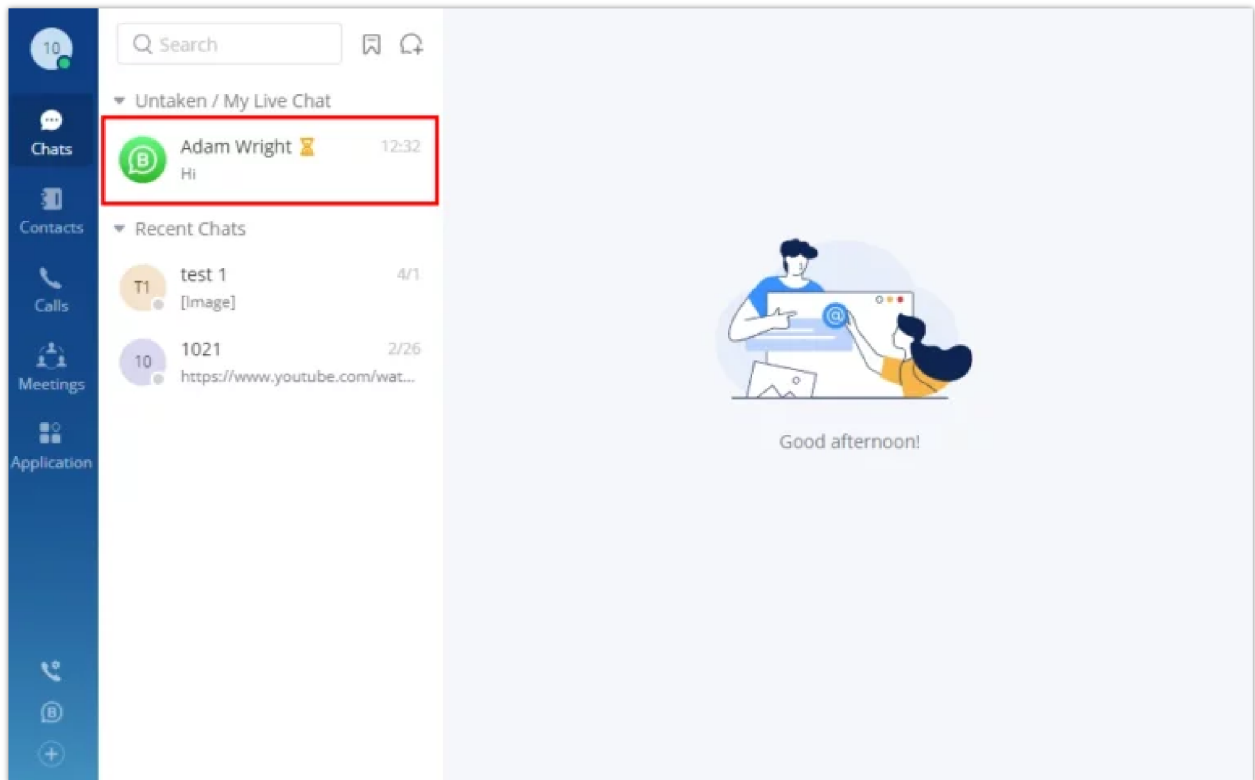
1. In the Webhook section, click Manage (located below the *Edit* button).
2. In the Webhook fields list, locate the **messages** field.
3. Click **Subscribe** next to it, then click Done.



Subscribing to the Messages Webhook Field

Once the webhook is registered and the messages field is subscribed, perform a quick end-to-end test to confirm the full integration is working:

1. From a personal device, send a WhatsApp message to the configured phone number.
2. Confirm the message appears in the Chat module of Wave Desktop on the assigned extension user's client.



Incoming WhatsApp Message in Wave Desktop Chat

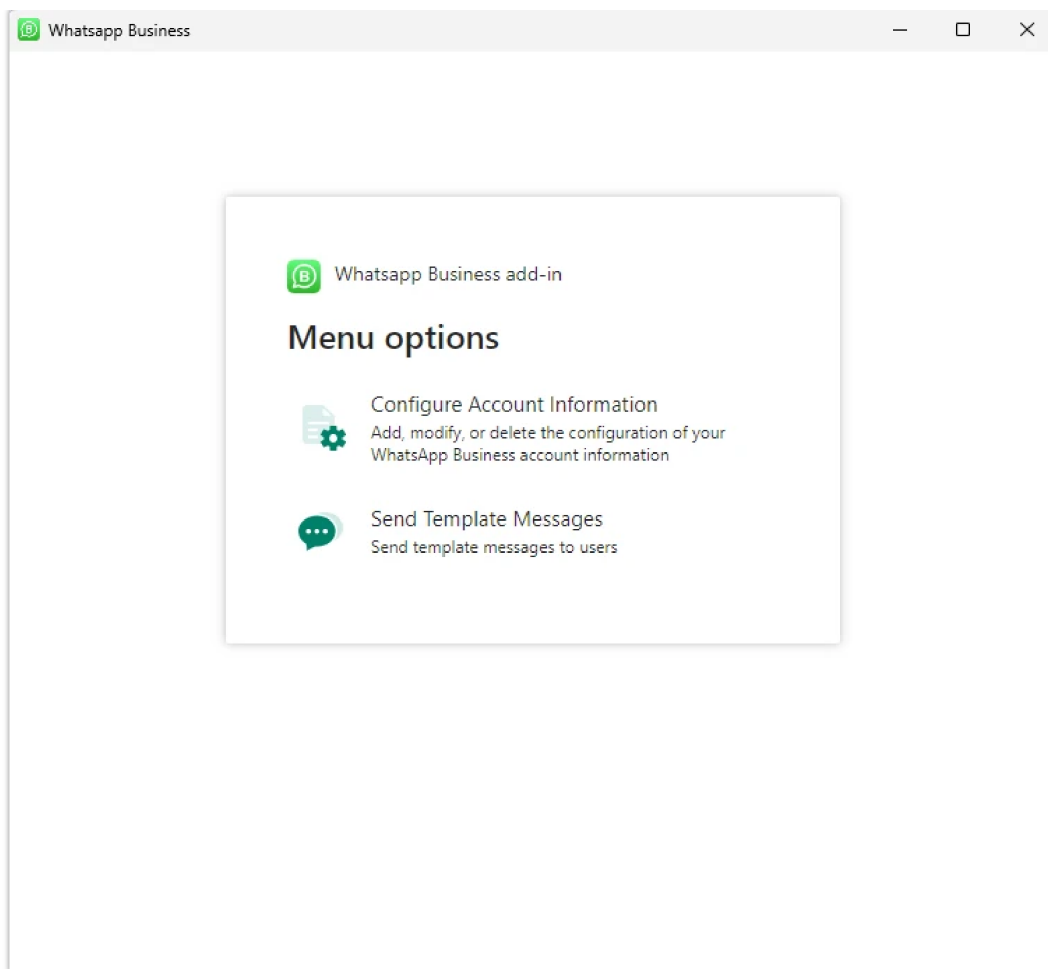
3. Reply to the message from Wave Desktop and confirm that the reply is received on the personal device.

WAVE DESKTOP CLIENT

Once the UCM configuration and webhook registration are complete, assigned extension users can access the WhatsApp Business integration directly from the Wave Desktop application. No additional setup is required on the client side.

To access the integration, download and open the WhatsApp Business add-in from Wave Desktop. The add-in presents two menu options:

- **Configure Account Information:** View the WhatsApp Business account configuration pushed from the UCM.
- **Send Template Messages:** Send pre-approved template messages to WhatsApp users.



Wave Desktop WhatsApp Business Add in

Note:

If you don't have access to the WhatsApp Business add-in on Wave Desktop, please check with your UCM/Wave Administrator.

Configure Account Information

This module displays the WhatsApp Business account configuration set by the UCM administrator. Extension users can view the configured account details, including the account name, associated Phone Number IDs, and webhook URL, but cannot edit or modify any settings.

Note:

For this integration, all WhatsApp account configuration is managed centrally by the administrator through the UCM Wave Management Portal. Changes to account settings must be made at the UCM level.

Whatsapp Business

< Configure Account Information

CompanyX [+ New](#)

Account information

Name
CompanyX

Access Token
EAAclCSZBWaGoBRB4AYHS...

(Option) Client Secret

Webhook URL

Webhook
https://.../gsim/webhooks/0-4016f8c327c84d07ae06ba0a5f61f0d7-c07...

Phone Number ID [+](#)

Phone 1

Phone Number ID
112173...

[Wave User Guide](#) | [Copy Account Configuration](#) [Delete](#) [Cancel](#) [Submit](#)

Configure WhatsApp Account on Wave Desktop

Send Template Messages

Template messages allow Wave Desktop users to send pre-approved, structured messages to one or more WhatsApp recipients on demand.

They are the only message type that can be sent outside of the 24-hour customer service window, making them suitable for outbound notifications, follow-ups, and marketing communications.

Prerequisite:

Message templates must be created and approved on the WhatsApp Business Platform before they can be sent from Wave Desktop. Refer to [Meta's template documentation](#) for guidance.

To send a template message from Wave:

1. Open the WhatsApp Business add-in from Wave Desktop and click **Send Template Messages**.

Whatsapp Business

Send Template Messages

Sender Account

Configured Account

CompanyX

▼

Phone Number ID

112173

▼

Template Message

Template Name

Template Language

(en_US) English (US)

▼

Add Template Parameters

Recipient

WhatsApp User's Number

Wave User Guide | Copy Account Configuration

Cancel

Send

Send WhatsApp Template on Wave Desktop

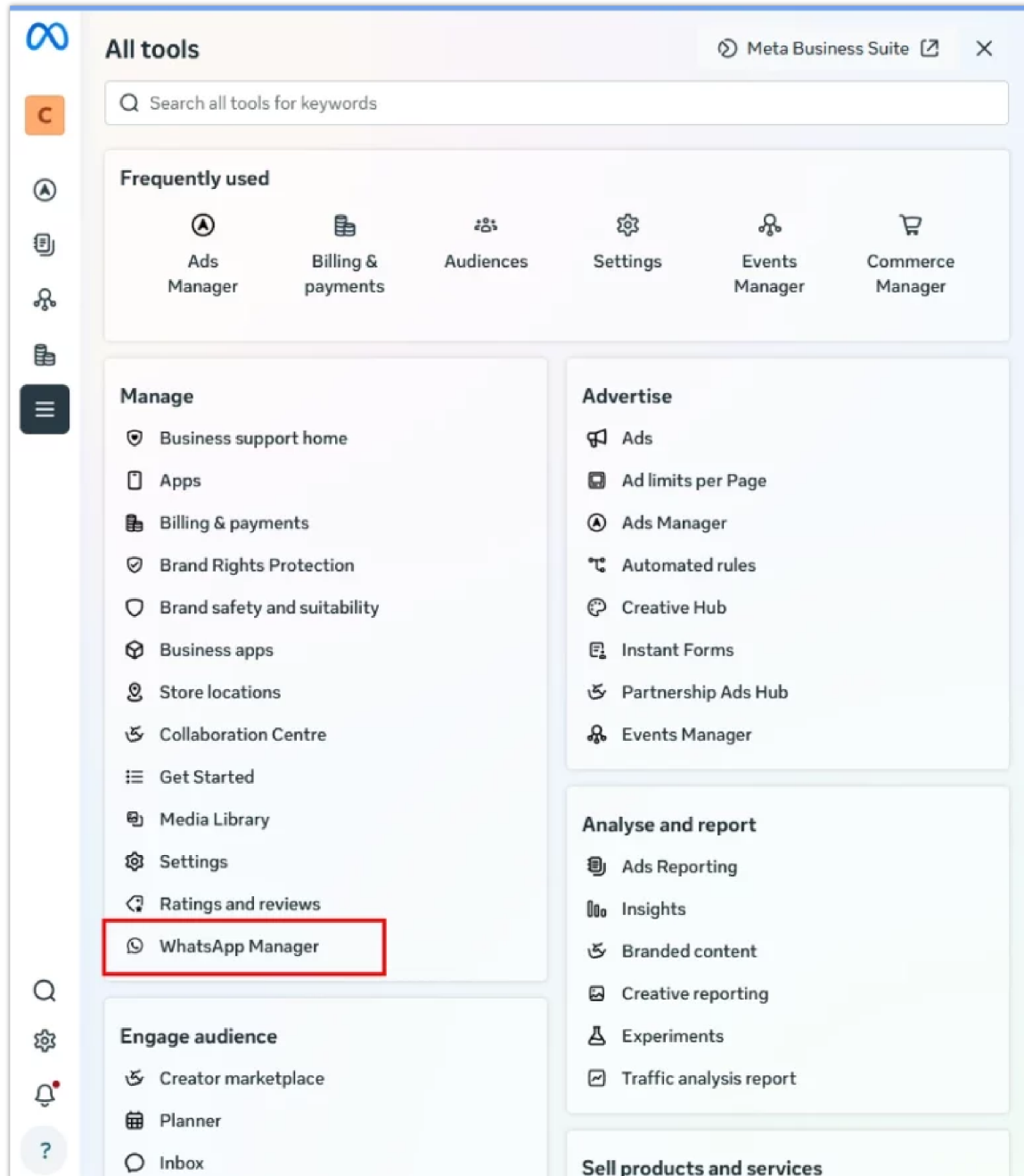
2. Configure the following fields:

Parameter	Definition
Sender Account	
Configured Account	Select the WhatsApp Business account to send from.
Phone Number ID	Select the Phone Number ID associated with the chosen account.
Template Message	
Template Name	Enter the exact name of the approved message template.
Template Language	Select the language of the template. Must match one of the languages configured in the Meta approved template.
Add Template Parameters	Required only when the template contains variable placeholders. Parameters must be added in the correct type and sequence.
Header Type	Supports image, video, and document uploads for templates with a media header.
Body Type	Supports text, date, time, and currency parameters. If the body contains multiple parameters, add them in the order they appear in the template.
Button Type	Only URL-type button parameters are supported.
Recipient	

WhatsApp User's Number	Enter the recipient phone number(s). Multiple numbers can be entered or pasted simultaneously, separated by spaces, line breaks, commas, or semicolons.
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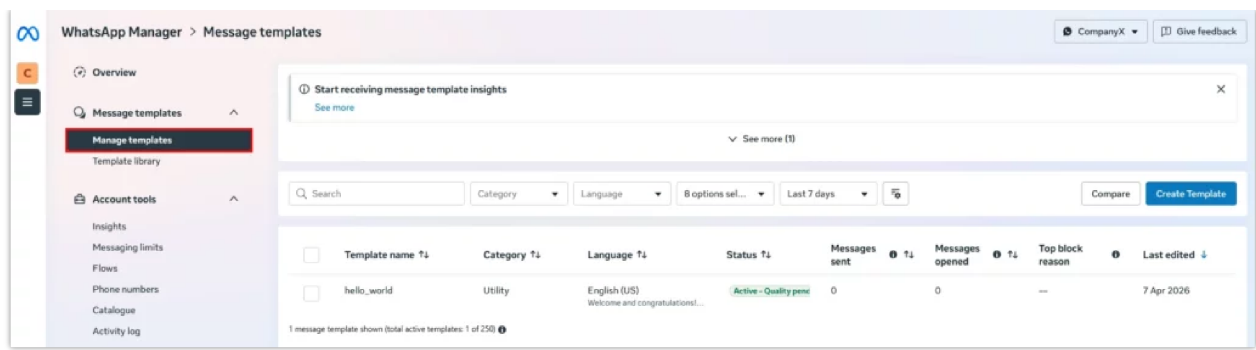
To retrieve the template name and language values needed in Wave Desktop, locate your approved templates on the WhatsApp Business Platform:

1. Go to <https://business.facebook.com> and sign in.
2. In the left sidebar, navigate to **WhatsApp Manager**.



WhatsApp Manager Configuration

3. Select your WhatsApp Business Account from the account list.
4. Click **Message Templates** in the left sidebar.



WhatsApp Message Template Configuration on Meta

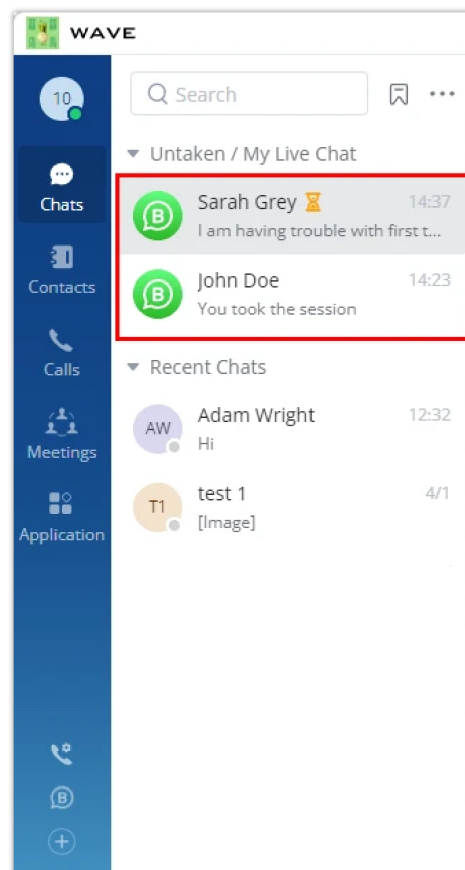
5. The template list displays all submitted templates and their current approval status. Only templates with an Active status can be sent.
6. Click on a template to view its full details, including:
 - o **Template name:** enter this exactly as shown into the Template Name field in Wave Desktop.
 - o **Language:** select the language matching option in the Template Language field in Wave Desktop.
 - o **Parameters:** review the header, body, and button components to determine what parameter values need to be supplied when sending.

Note:

Only templates with an approved status can be sent. If a required template is not yet approved, submit it through WhatsApp Manager and wait for Meta's review before attempting to send.

Receiving Messages

Incoming WhatsApp messages are routed to the assigned extension user(s) and appear in the Chat module of Wave Desktop.



Wave Desktop Chats

Each WhatsApp conversation is listed as a separate session, identified by the visitor's display name. Agents can send text messages and file attachments in reply.

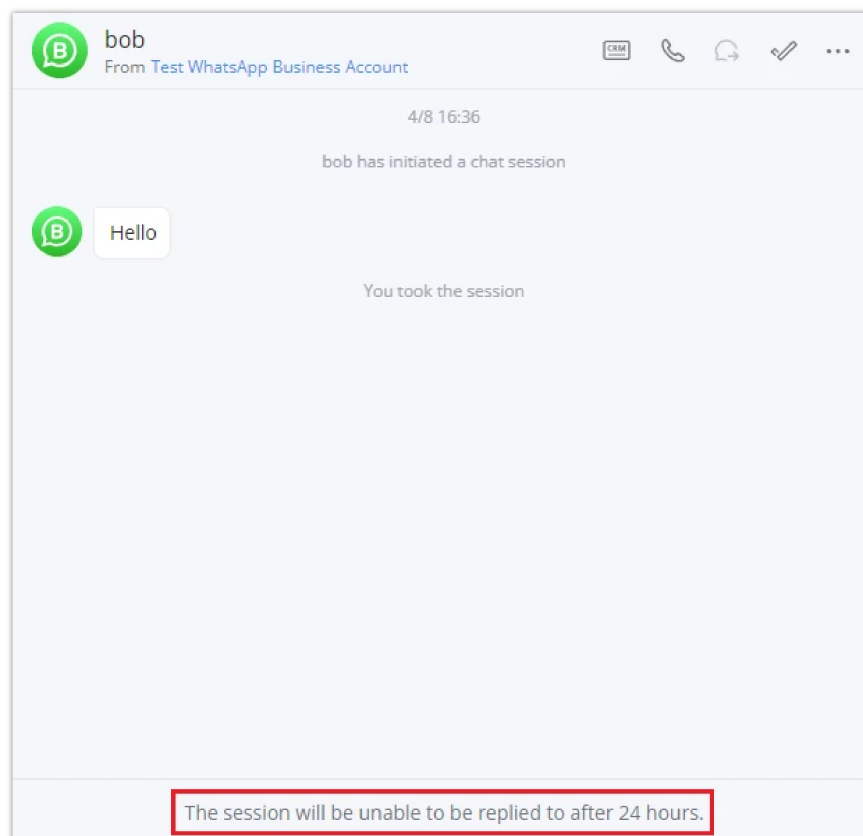
Note:

- Wave Desktop users can only reply to a visitor after the visitor has sent the first message. Outbound conversations cannot be initiated by the agent directly.
- To contact a WhatsApp user who has not yet reached out, use the Send Template Messages function described in the previous section.

WhatsApp enforces a 24-hour customer service window. Once a visitor sends a message, the assigned agent has 24 hours to reply within the open session. After this window closes, the chat input field will be disabled for that session.

Note:

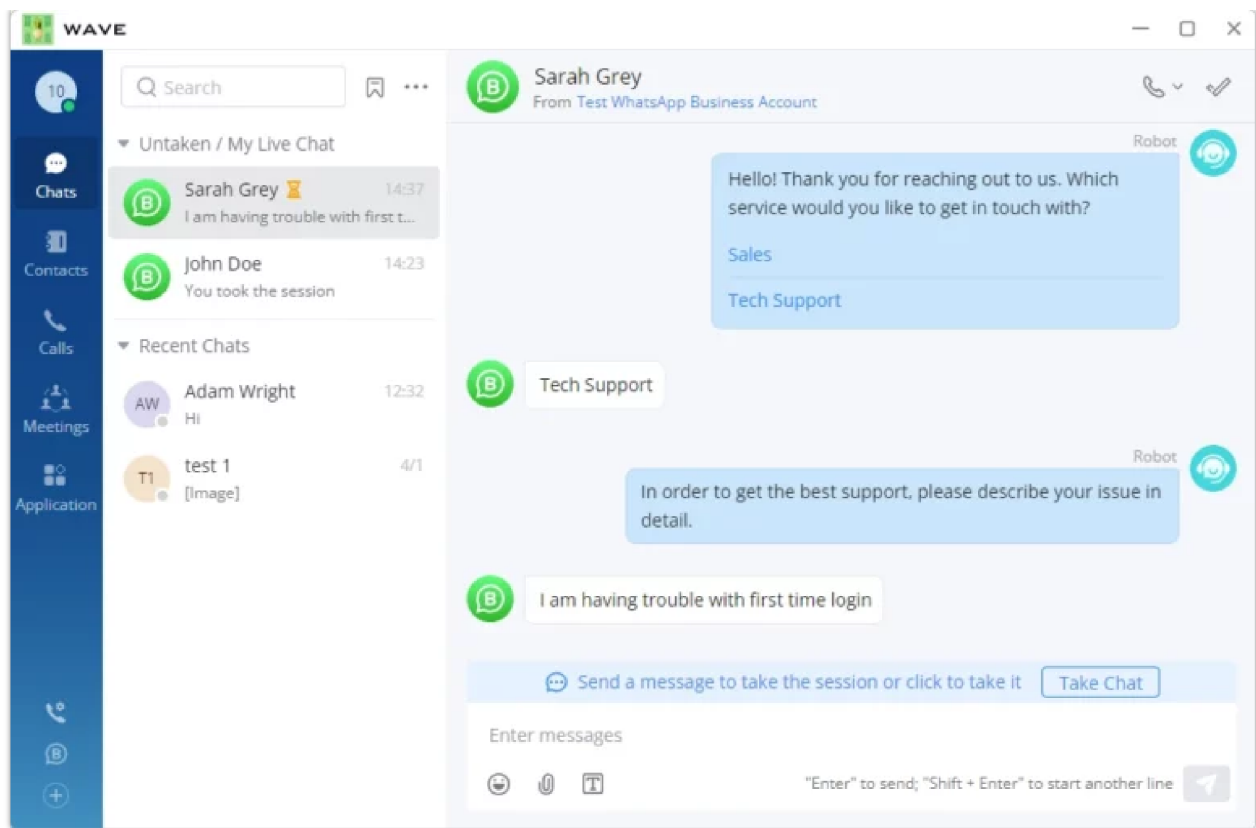
The 24-hour window resets each time the visitor sends a new message.



Wave Desktop 24 Hour Window Warning

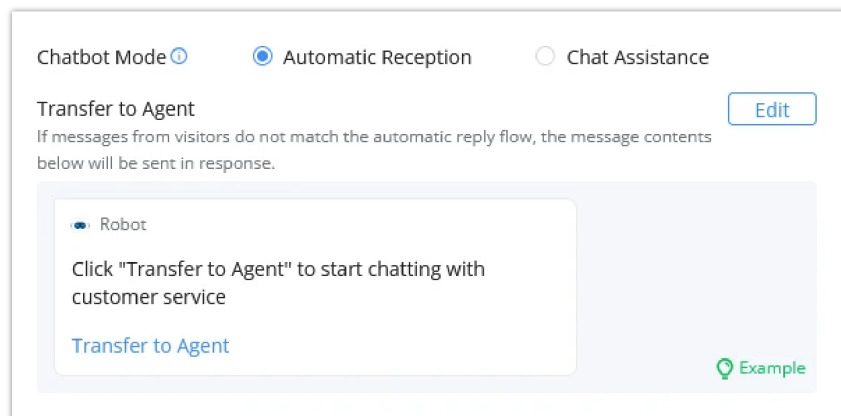
Chatbot Interaction

From the visitor's perspective, the Chatbot responds automatically to incoming messages according to the configured reply flow. Depending on the flow design, the visitor may be presented with options, prompted for input, or guided through a predefined interaction sequence.



Chatbot Handling for WhatsApp Session

If the Chatbot cannot answer a query or the visitor requires human assistance, a Transfer to Agent option is presented, which can be customized in the UCM WhatsApp settings.



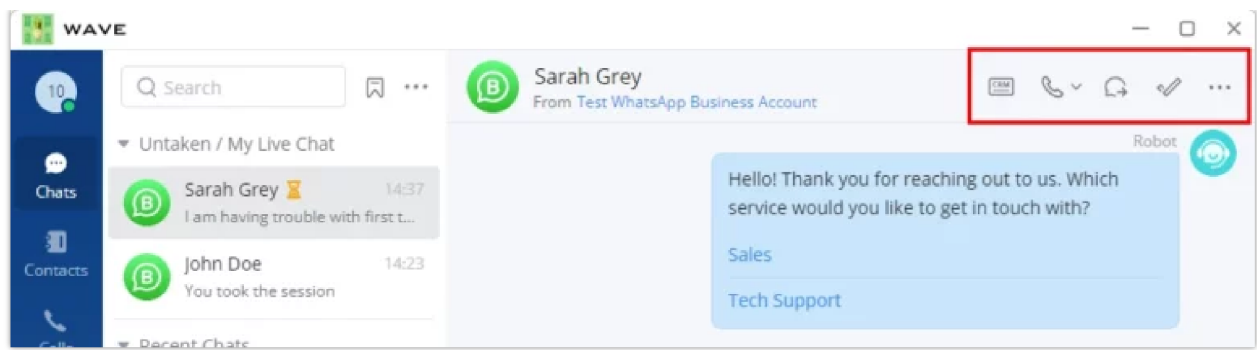
Transfer to Agent Configuration Option

When a visitor selects Transfer to Agent, the session is pushed to the assigned extension user(s) in the Wave Desktop Chat module. The agent receives a session notification and can open the conversation to take over.

For more information on chatbot flows and configuration steps, please refer to the [Live Chat Chatbot Admin Guide](#).

Chat Window Actions

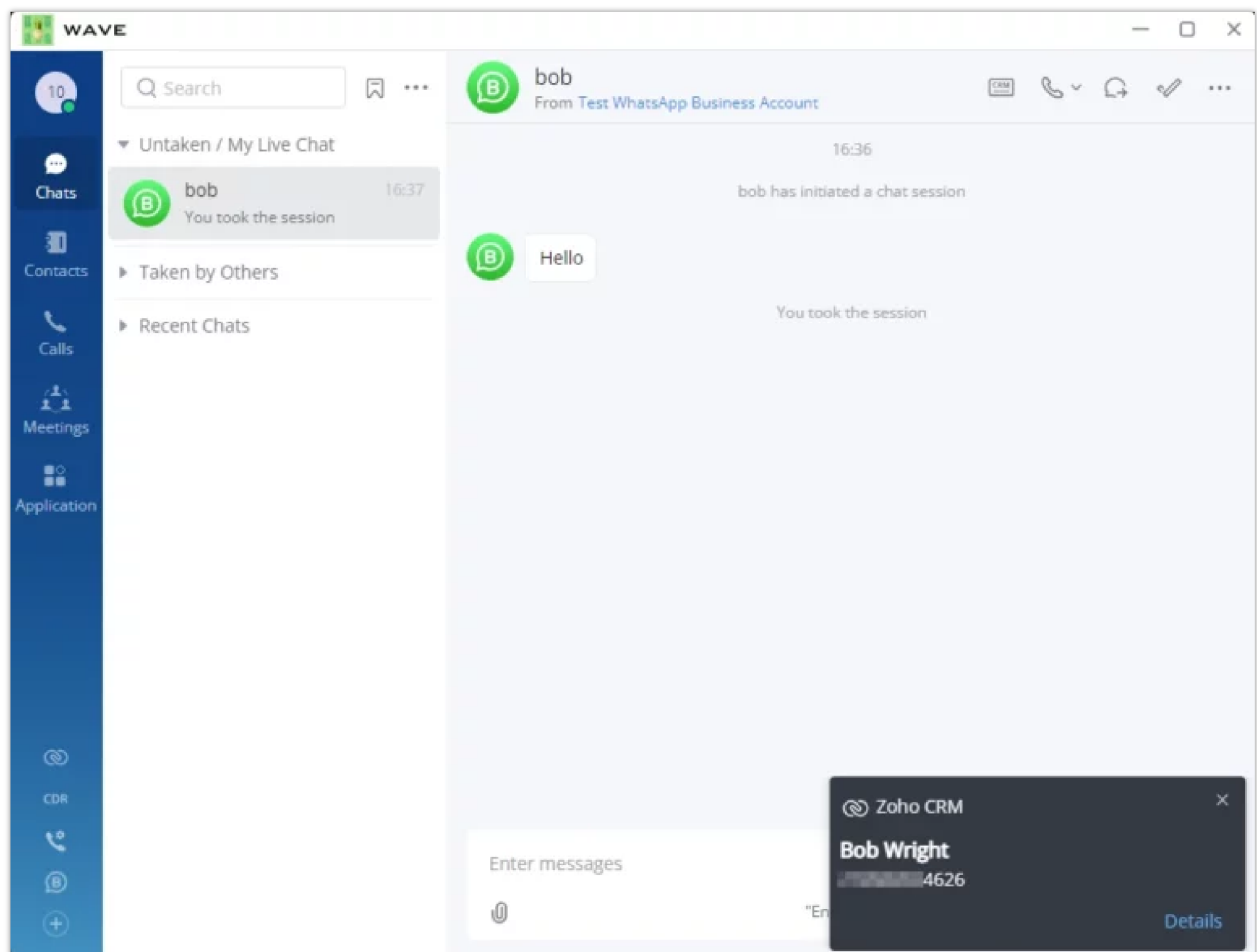
The following actions are available from the upper-right corner of an active WhatsApp chat window:



Wave Chat Window Action Icons

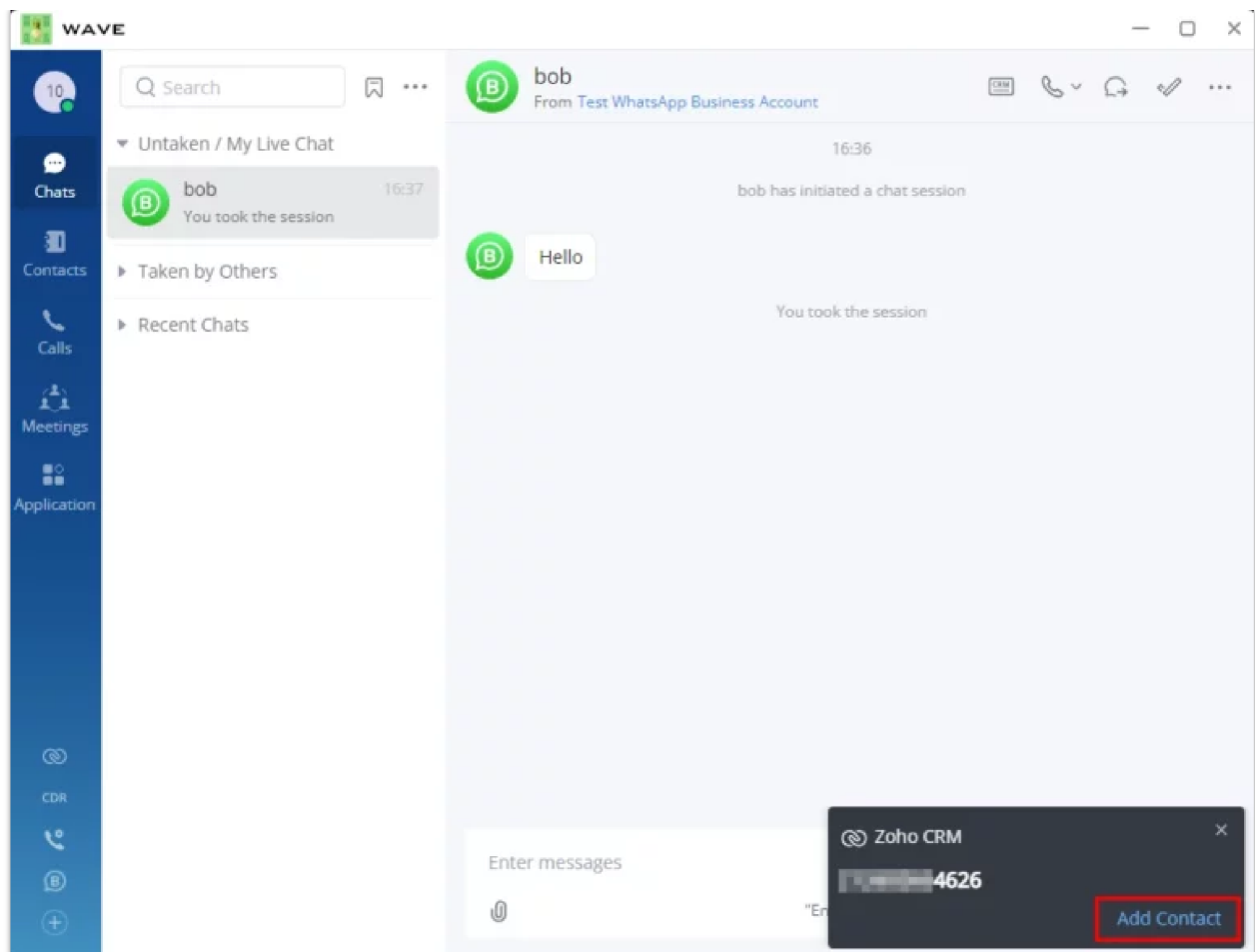
View CRM Contact

Clicking this option opens the CRM record associated with the WhatsApp session directly from the chat window. This action is only visible when a CRM add-in is installed, and the user is logged in.

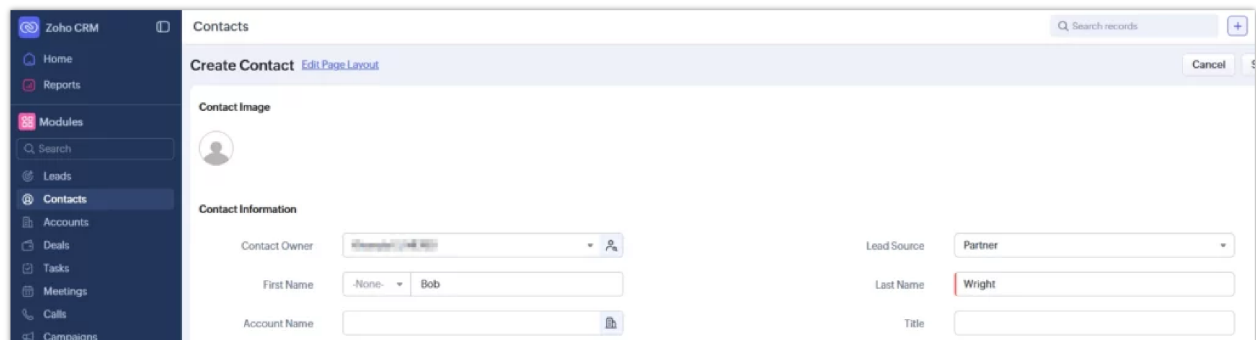


CRM Record Matched from WhatsApp Session

If no matching contact record exists for the visitor, the CRM prompts the agent to create a new one. For example, when using the Zoho CRM integration, clicking View CRM Contact on a session with no existing record opens a Zoho contact creation pop-up.



WhatsApp Session with No Matching CRM Contact



Create CRM Record from WhatsApp Chat

Note:

The visitor's phone number is not directly visible in the chat window. To retrieve the full phone number associated with a WhatsApp session, open the contact record via View CRM Contact or use the Dial action described below.

Dial Actions

This option initiates an outbound voice call to the phone number associated with the active WhatsApp session. The call is processed by the UCM telephony engine and routed via the configured SIP trunks according to the outbound routing rules.

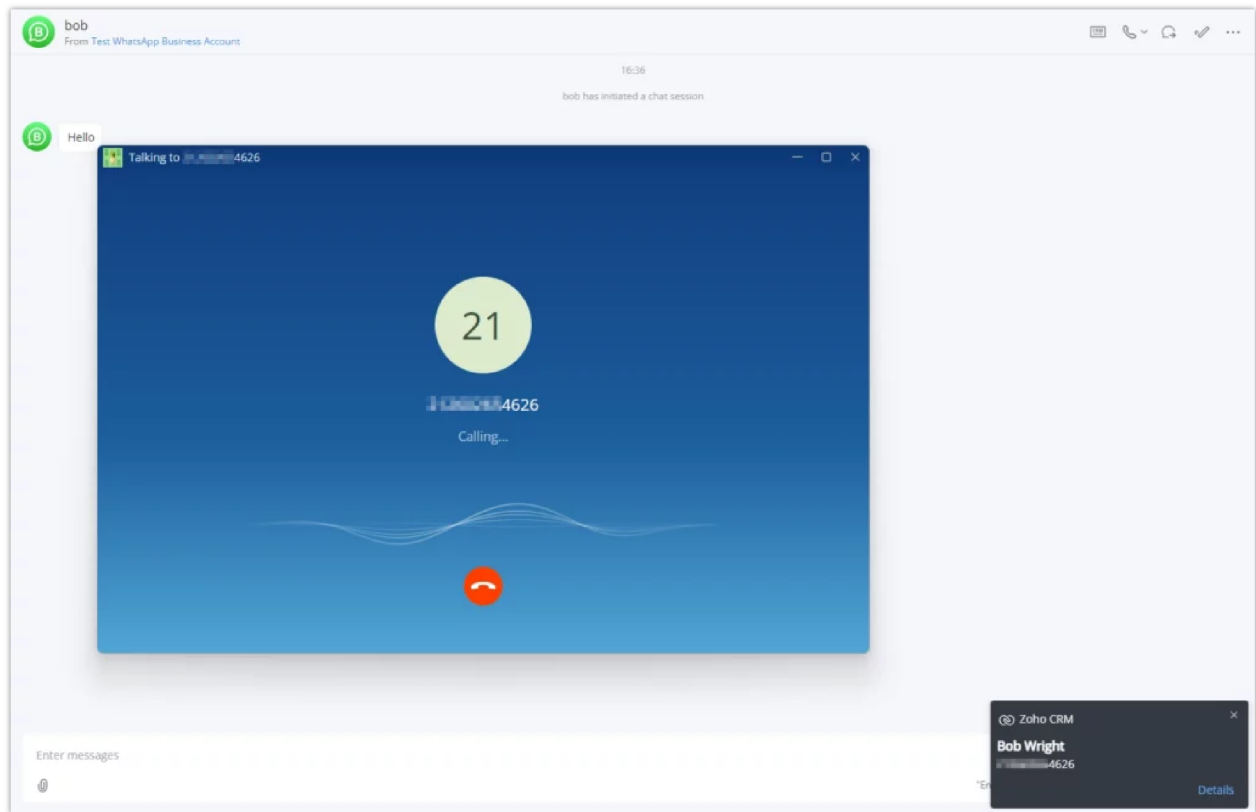
Prerequisite:

An outbound route must exist with a dial pattern that matches the destination (visitor's) number. If no outbound route matches the number, the call setup will fail due to a routing mismatch.

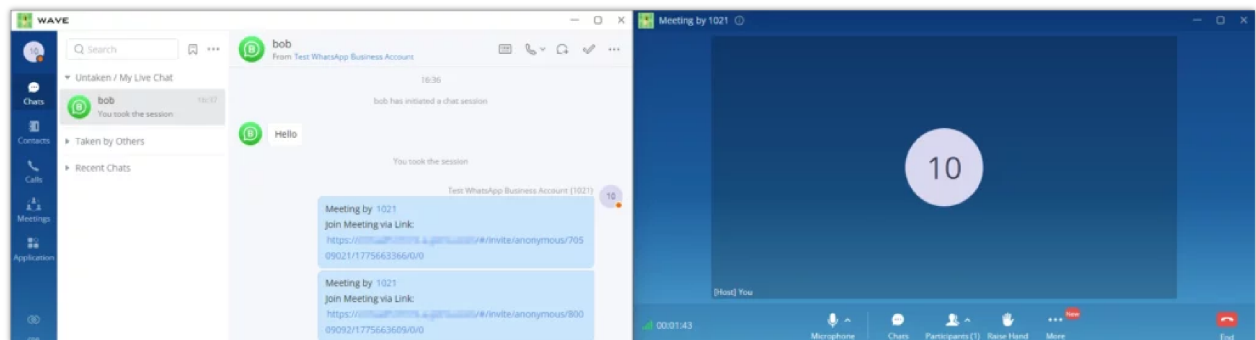
Users can either:

- **Call Number:** Initiates a standard outbound call to the number associated with the current WhatsApp conversation.

- **Start Meeting:** Creates a meeting session and generates an invitation link, allowing the agent to invite the contact and additional participants.



Outbound Call Placed from an Active WhatsApp Session



Meeting Session Started from an Active WhatsApp Session

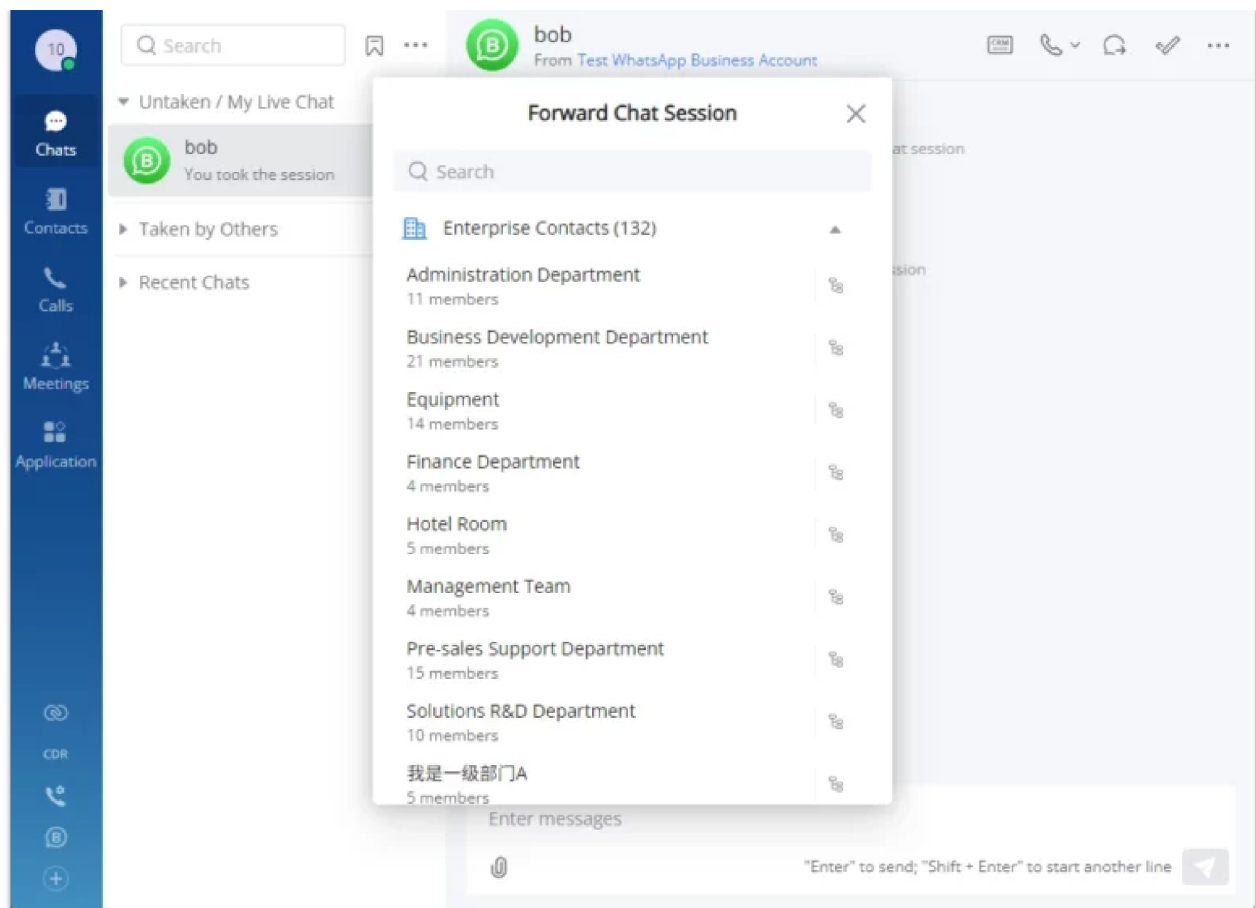
Forward Session

The Forward Session action allows agents to hand off an active WhatsApp conversation to another Wave Desktop user without interrupting the visitor experience.

Once a session is forwarded, the receiving agent inherits the full conversation history and can continue the exchange seamlessly.

Note:

- The WhatsApp session will be unable to be forwarded after 24 hours.
- The receiving agent must be logged into Wave Desktop to accept a forwarded session. Forwarding to a Wave Web or Wave Mobile user is not supported.

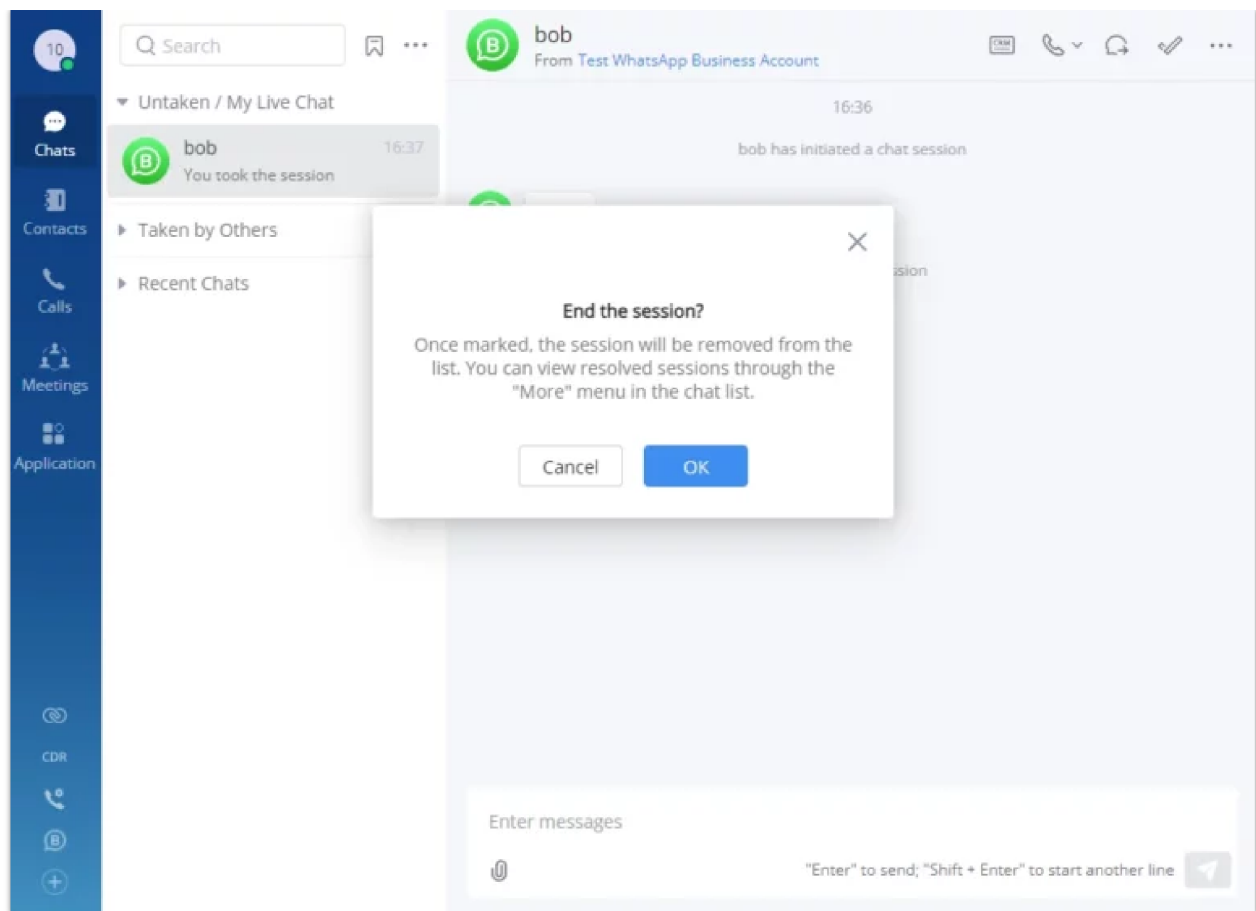


Forward Active WhatsApp Session

Mark as Processed

Clicking this option marks the session as resolved and removes it from the active chat list. Use this once the visitor's query has been fully addressed.

Marking a session as processed does not block the visitor from sending future messages. If the visitor sends a new message after a session is closed, a new session will be created and routed to the assigned extension user(s).

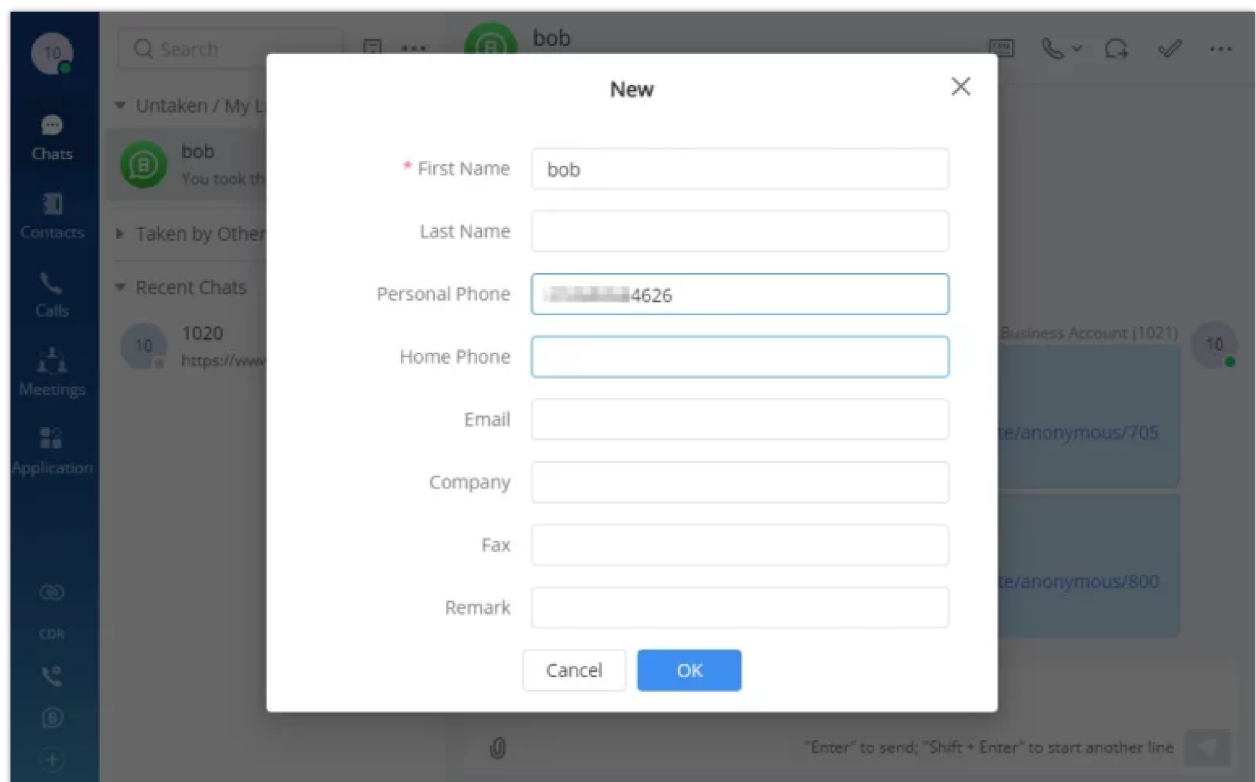


End Active WhatsApp Session

Add to Personal Contacts

This option allows the agent to save the phone number associated with the active WhatsApp session to their personal contact list on the UCM.

When selected, the system prompts the user to define contact details (e.g., last name, company, fax) before saving.

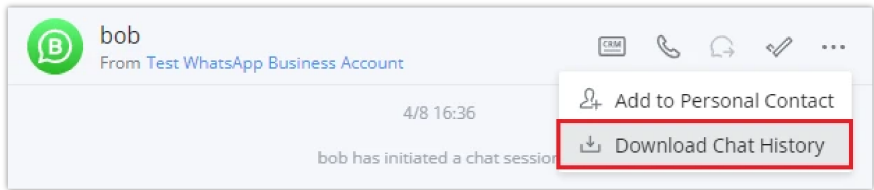


Add to Personal Contacts Dialog

Download Chat History

Agents can download a local copy of the conversation history for any WhatsApp session. Clicking this option exports the chat log, including message content and timestamps.

Downloaded chat history is saved locally on the agent’s machine. Retention and storage of exported chat logs are subject to your organization’s data handling policies.



Download Chat History Option

SUPPORTED DEVICES

Models	Firmware Required
UCM630x Series	1.0.29.19+
UCM630xA Series	1.0.29.19+
CloudUCM	1.0.29.7+