

SETUP GUIDE

WhatsApp, *wired into* your automations.

A real WhatsApp Business sender on the same number your AI receptionist answers: **Meta business portfolio**, **Twilio sender**, **approved templates**, and a two-way inbox in Slack built on n8n. Written from doing it on our own account, including the day Meta banned it, and how it came back.

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EDITION

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SCOPE

WhatsApp Business Platform through Twilio, for a client build

TESTED

End to end on a live account; every result checked through the API, not the screen

APP VERSUS PLATFORM

The free app works until somebody has to be awake.

There are two WhatsApps for business. This guide builds the second one, and it looks like overkill right up to the moment you need it.

	WHATSAPP BUSINESS APP	WHATSAPP BUSINESS PLATFORM
What it is	The free app a shop installs on a phone	The API version, reached through a provider such as Twilio
Who answers	A person, every time. Built-in greeting, away message and quick replies are the whole of its automation	Your automations. A person only when the automation cannot
Connects to	Nothing. No API, so no booking confirmations, no CRM, no delivery receipts	Anything: n8n, a CRM, a booking system, Slack, an AI agent
Device	Tied to a phone, plus a few linked devices	No phone at all. The number lives in Twilio
Same number as calls and SMS	Only if a phone answers it	Yes — one line for voice, SMS and WhatsApp
Costs	Free	A few cents a message, template approvals, the 24-hour rule

"AUTOMATION FOR THE WHATSAPP APP" TOOLS

Most of them drive WhatsApp Web in a hidden browser. That is against Meta's terms and is how business numbers get banned. If a client's messages must be automated, the platform is the only supported route.

When the app is enough

A shop that answers a handful of chats a day by hand, with no confirmations to send and nothing to connect. **The moment they want booking confirmations, reminders, or an AI receptionist tied in, they need the platform.** That is the conversation to have with them.

Why WhatsApp at all, if you already have SMS

US texting needs A2P 10DLC registration, which covers **US recipients only**. Outside the US, each country has its own SMS rules, while WhatsApp is often what people actually use. The design this guide builds: **US callers get SMS, everyone else gets WhatsApp**, from the same number.

THE WORDS NOBODY DEFINES

Ten terms, and Meta's screens start making sense.

Every error message and support reply uses these as though you already know them.

TERM	WHAT IT MEANS
Business portfolio	Meta's record of the company (formerly Business Manager). It owns everything below it. Managed from a personal Facebook login — there is no other way in
WABA	WhatsApp Business Account. The WhatsApp container inside the portfolio: it holds the sender numbers, the templates and the WhatsApp billing. Every ban, error and support ticket names it by its ID
Sender	A phone number registered on a WABA. In Twilio it is written <code>whatsapp:+15550100123</code>
Display name	The business name people see in the chat. Reviewed by Meta, and hard to change later
Embedded Sign-Up	Meta's sign-up pop-up, run from inside Twilio (Twilio calls it Self Sign-up). It creates the WABA and registers the number in one pass
24-hour window	After a customer's last message you may reply freely for 24 hours. Outside it, only an approved template goes through
Template	A pre-approved message with blanks, such as <i>"booked for {{1}}"</i> . Required whenever the business writes first
Category	What Meta says a template is: utility (confirmations, reminders), marketing (promotions), authentication (login codes). It sets the price and how strict the review is
Business verification	Meta checking the company is real, with official documents. Optional to start; it lifts the limits (page 10)
Messaging Service	A Twilio container of senders with shared settings — opt-out keywords, webhooks. The WhatsApp sender joins the same one as the SMS number

THE HIERARCHY, IN ONE LINE

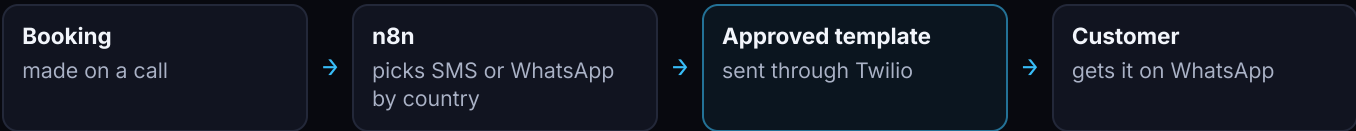
Facebook login → **business portfolio** (the company) → **WABA** (its WhatsApp) → **phone number** → Twilio sender. A WABA can be disabled while the portfolio above it survives, and that distinction comes up on page 9.

WHAT TALKS TO WHAT

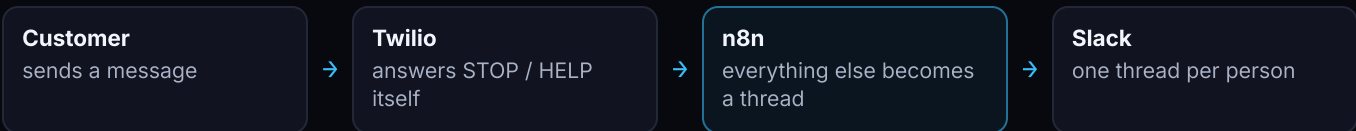
Three paths through the same number.

Meta owns the WhatsApp side, Twilio carries the messages, n8n decides what happens, and a person only sees what the automation could not handle.

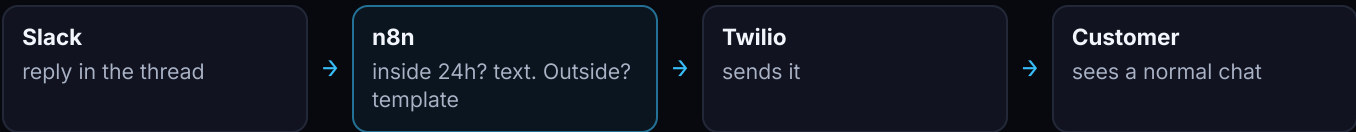
1 • THE BUSINESS WRITES FIRST — A CONFIRMATION



2 • THE CUSTOMER WRITES



3 • A PERSON REPLIES



Who owns which piece

PIECE	LIVES IN
Portfolio, WABA, templates' approval	Meta — business.facebook.com and WhatsApp Manager
Phone number, sender, Messaging Service, templates' content	Twilio — the client's own account
Routing, threads, the 24-hour decision	n8n — three small workflows (page 14)
The inbox a person reads	Slack in this guide — or any inbox the client already uses (page 14)

Nothing here touches the voice agent. The number already answers calls over a SIP trunk (see our BYOC guide); WhatsApp is a third, independent attachment on the same number.

ASK THE CLIENT AT KICKOFF

Six things to collect before the first click.

Every one of these cost us days because we did not have it on day one.

- ❑ **An established Facebook account to administer it.** Ideally the client's own, years old, with real history. A brand-new profile gets identity checks, and new assets created on it get banned (page 9)
- ❑ **A second admin.** If the only admin's profile is suspended, the portfolio and everything in it is stuck with nobody able to manage it
- ❑ **The company's official documents.** For a US company, the IRS EIN letter (**147C** or **CP-575**) or the state formation papers
- ❑ **A phone bill in the company's name showing the sender number.** The one nobody mentions — it is what business verification asks for (page 10). A number bought from Twilio has no bill; a client's existing business line usually does
- ❑ **A website on the company's own domain** with a privacy policy, and **access to its DNS** (registrar login, or someone who has it)
- ❑ **A number that is not on WhatsApp already.** If it runs the WhatsApp app on a phone, it must be removed there first; one number, one registration

The order this guide follows

#	STEP	WHERE
1	Business portfolio and business info	Meta
2	Verify the domain	Meta + DNS
3	Register the sender (Self Sign-up)	Twilio + Meta
4	Business verification — optional at first	Meta
5	Profile, Messaging Service, webhooks	Twilio
6	Opt-outs, templates, then the two-way inbox	Twilio + n8n + Slack

TIMELINE TO QUOTE

Twilio calls it a three-minute sign-up, and the sign-up itself is. **Ours took six days** to a working sender — a ban, a review and a support ticket — then templates take up to 48 hours each. **Quote a week** for the WhatsApp layer, and say why.

META • BUSINESS.FACEBOOK.COM

Create the company before Twilio does it for you.

Twilio's sign-up can create the portfolio itself, but making it first lets you fill it in properly and verify the domain before WhatsApp is involved.

- 1 **Log in to Facebook** with the admin's personal account. A new account goes through a captcha and a video selfie, then "usually about an hour" of review. **Never create a second account while one is under review** — Meta treats duplicates as a violation and can disable both
- 2 **business.facebook.com → create a business portfolio.** Three fields: business name, your name, business email. A confirmation link goes to that email
- 3 **Settings → Business info → edit Business details.** Legal name, address, phone, website and tax ID

FIELD	WHAT TO ENTER
Business name	The legal name, but not in capitals : YOURBRAND LLC is refused with "Consider using Yourbrand LLC instead". Reviewers match words, not case
Your name	The admin's legal name. Visible only to people inside the portfolio
Address	Exactly as on the EIN letter — the same address used for A2P and Stripe, so every record agrees
Phone	The number the website prints. Ideally the one the phone bill shows (page 10)
Tax ID (EIN)	Fill it in even though it says optional: Meta uses it to look up the company's official record

LEAVE THE SECURITY CENTER ALONE

It shows "1 user without passkey" with a *Take action* button that offers to **remove users** without one — and the only user is you. The verification card there will say "Your organization does not need to be verified". That changes once a WhatsApp account exists (page 10).

If the first page load says "We're having trouble completing your request", reload. It came up once for us and meant nothing.

META + THE REGISTRAR

Prove the website is theirs, with one DNS record.

Not strictly required for WhatsApp, but it is five minutes, it never expires, and it gives a reviewer one less thing to doubt.

- 1 **Left menu → Brand safety and suitability → Domains → Add → Create a domain.** The name is misleading: it means *add a domain you own*. “Request access” is for a domain another portfolio owns
- 2 **Type the bare domain** — yourbrand.com, no https://, no www
- 3 **Switch the method to DNS TXT record.** Meta opens on *Add a meta-tag*, which means editing the website’s code. DNS does not touch the site
- 4 **At the registrar, add a TXT record:** host @, value the full facebook-domain-verification=... line. Existing TXT records stay; several can sit side by side
- 5 **Check it is live, then click Verify domain**

Check before you click, from any terminal

```
dig +short TXT yourbrand.com @8.8.8.8
```

DNS records are public, so no registrar login is needed to read them. Ask Google’s resolver (8.8.8.8, roughly what Meta sees) and the registrar’s own nameserver. When the Facebook line appears, click Verify.

“UP TO 72 HOURS”

That is Meta’s worst case. Ours verified on the first click, minutes after the record went live. If your own computer still shows the old answer, that is its cache — the public resolver is the one that counts.

TWILIO → META'S POP-UP

Register the number, screen by screen.

Twilio console → Messaging → Senders → WhatsApp senders → **Create new sender** → pick the Twilio number → **Continue with Facebook**. Leave the Twilio tab open: the code will land there.

META ASKS	CHOOSE
Phone number	"Create a new one" and type the Twilio number. Not "display name with a virtual number" — that is Meta supplying a number of its own
Verification method	Text message . The code appears in the six boxes on the Twilio tab and in Twilio's message log. A phone call would be answered by the AI agent, and Twilio says an automated line cannot receive it
Business portfolio	The one from step 1. With only one, it is pre-selected
WhatsApp Business account	Create a WhatsApp Business account
Business info	Name, category, country, website, time zone, description — the description becomes the profile's "about" text
Permissions	Confirm. It lets Twilio manage the WABA and send for you; revocable from Business settings
Two pre-ticked boxes	Untick both — "identify order and lead events" and "insights". They share conversation content with Meta for ads

THE DISPLAY NAME IS NEVER ASKED

The flow reuses the **account name** as the display name and Meta approves it within minutes. Ours became "Yourbrand LLC" instead of "Yourbrand", and changing it afterwards needs a Twilio ticket, Meta re-review and a verified business. **Type the account name exactly as customers should see it.**

The success screen says Meta will "review your business within 24 hours". That review is automatic, and it is what bit us. Read page 9 before you run this step on a new account.

WHAT HAPPENED TO US

Banned before the first message.

Minutes after sign-up: “breach of Terms of Acceptable Use”, duration “Permanent”, zero messages sent. A day-old Facebook profile, a day-old portfolio and a new WABA, all in one sitting, look like a spam farm to an automated check.

- 1 **WhatsApp Manager → Resolve issues → Business Support Home → Request review.** Short and checkable: a registered company, the account created today through Twilio, no messages sent, messages only to people who ask, domain verified. If the admin’s profile was flagged that day, say so
- 2 **Meta restored ours four hours later** (“We have reversed the issue”). The human review works
- 3 **Twilio did not notice.** The sender stayed OFFLINE with error 63101 — Twilio does not re-check after Meta reverses a ban, the sender page is greyed out, and the WABA ID cannot be set by API (63100)
- 4 **Open a Twilio ticket** (free plan: Help Center → the AI assistant → Submit a ticket). Ours: Twilio had to **manually link the WABA to the account**. Then any real profile edit re-runs registration, and the sender came ONLINE

WHAT NOT TO DO WHILE IT IS BANNED

Do not re-run the sign-up, create a second WABA or portfolio, file several reviews, or delete the Twilio sender. Each reads as evading the ban — the way a reversible flag becomes a final one.

How to avoid it in the first place

- Use the **client’s aged** Facebook profile and existing portfolio. Ours was suspended twice in five days for looking automated
- Create the profile, the portfolio and the WABA on **different days**
- Add a second admin early, and turn on two-factor login on the admin profile

Meta’s AI assistant in Business Support Home told us more than the ban notice did, including a second, half-created WABA nobody could see. Useful leads, not a verdict.

OPTIONAL TO START

The sender works without it. Verification lifts the ceiling.

Once a WABA exists, the Security Center switches to “Eligible for verification”. Nothing you build depends on finishing it.

	UNVERIFIED	VERIFIED
Conversations you start	250 customers per rolling 24 hours	Higher, rising with quality
Phone numbers	2	Up to 20
Display name	Locked; often shown as the number to people who have not saved it	Changeable, shown in chats
Green badge	A separate request (Official Business Account), only after verification	

The 250 counts only conversations **the business starts**; replies to people who wrote first do not. **The form:** Security Center → *Setting up a WhatsApp Business account* → Start verification. An LLC is **Private Company**, not Sole Proprietorship. If Meta finds no official record (normal for a young company), it asks for documents; the **IRS 147C** is listed by name and marked Recommended.

THE TRAP: PROVING THE PHONE NUMBER

After the name document, the form demands a second one showing **the company name and the phone number together**, and will not continue without it. EIN letters carry no phone. **A Twilio number has no phone bill**, and Twilio confirmed it issues no document linking a number to a company. We stopped there.

A business that already has a phone line

OPTION	HOW IT PLAYS OUT
Their bill for verification	The phone in Business info is the company's contact number; it does not have to be the WhatsApp sender . Put the line that has a bill there, upload the bill, and the sender can still be a Twilio number
Their number as the sender	Twilio accepts a non-Twilio number as a WhatsApp sender, if it can receive the code by SMS or call and is not on the WhatsApp app. Calls keep ringing their phones; only WhatsApp moves
Port it into Twilio	Number, calls, SMS and WhatsApp all in one place, answered by the AI agent. Verify before porting , while the old carrier's bill still exists

Never submit a document you know does not match — a rejection on a portfolio that has already been flagged is the worst outcome on this page.

TWILIO • THE SENDER'S PAGE

Profile, service, webhooks: three settings, one page.

Messaging → Senders → WhatsApp senders → the number. All three live on the same screen.

Business profile

FIELD	NOTE
Profile photo	Square, 640×640 or larger , opaque and full-bleed. WhatsApp crops it to a circle, so a rounded app icon with transparent corners looks wrong
Profile about	Required, 139 characters. The form will not save without it
Address, website, email, vertical, description	Business address, not anyone's home — this is public

The console form does not show values set through the API, and saving it with a blank field can wipe them. Fill every field each time you save.

Messaging Service

Add the WhatsApp sender to the same Messaging Service as the SMS number (Messaging → Services → Sender Pool). One set of rules for both channels — and the opt-out switch on the next page, which is not on by default.

Webhooks

FIELD	POINT IT AT
Incoming messages	The n8n inbound workflow (page 14)
Status callback	The n8n delivery-status workflow. A message ID is not delivery — only the callback says delivered, read or failed

SET THEM ON THE SENDER, NOT THE NUMBER

The phone number keeps its own SMS webhook. The WhatsApp sender's webhooks are separate fields, so SMS and WhatsApp can go to different workflows without touching each other or the voice agent.

TWILIO • OPT-OUT MANAGEMENT

STOP does nothing on WhatsApp until you switch it on.

Every message tells people to reply STOP. On WhatsApp, out of the box, that reply is just text: no confirmation, no block, and the next reminder still goes out.

WHAT WE FOUND

Our WhatsApp sender was already in the Messaging Service. A real “STOP” arrived as an ordinary message: no reply to the customer, no opt-out flag on the webhook, nothing blocked. **Twilio’s default STOP handling covers SMS only.** Joining the service is not enough.

1 Messaging → Services → your service → Opt-Out Management → Enable Advanced Opt-Out.

The default keywords and replies are fine as they are

2 Test with a real phone: reply STOP on WhatsApp. You should get Twilio’s confirmation, and the inbound webhook now carries `OptOutType: STOP`

3 Reply START to opt back in, or the tester can no longer be messaged

KEYWORDS	WHAT TWILIO DOES
STOP, CANCEL, END, QUIT, UNSUBSCRIBE, STOPALL, REVOKE, OPTOUT	Replies with its unsubscribe message and blocks every later send to that person. A blocked send fails with error 21610
START, YES, UNSTOP	Re-subscribes the person and confirms
HELP, INFO	Replies with the help message

The replies are Twilio’s standard texts, edited on that same page — not templates and not n8n. They apply to SMS and WhatsApp alike. Opt-outs are kept per address, so STOP on WhatsApp does not stop SMS.

Keep your own list

Twilio enforces opt-outs but has **no API to list them**. So the inbound workflow also reads `OptOutType` and, on STOP or START, sets the consent field on the person’s CRM record and their upcoming bookings, and logs the change. That is the list a client can open — and it stops reminders being queued for someone who left.

TWILIO • CONTENT TEMPLATE BUILDER

Every message the business starts needs Meta's approval.

A booking confirmation goes to someone who spoke on the phone and never wrote on WhatsApp, so the 24-hour window is closed and only a template gets through.

- 1 **Create new.** Name in lowercase and underscores, language, content type **Text**
- 2 **Body**, with `{{1}}`, `{{2}}` for the blanks
- 3 **Save and submit for WhatsApp approval** opens two dialogs. First, a **sample for each variable** (Meta's reviewer reads it; "Save without samples" makes the template impossible to submit later). Second, the **category: Utility**

The set a receptionist needs

TEMPLATE	BODY
<code>_call_booked</code>	Your call with {name} is booked for {{1}}. The meeting link is in your email. Need a different time? Call {number}. Reply STOP to opt out.
<code>_call_moved</code>	Your call has moved to {{1}}. The meeting link is in your email. Reply STOP to opt out.
<code>_call_cancelled</code>	Your call on {{1}} has been cancelled. Call {number} any time to book a new one. Reply STOP to opt out.
<code>_call_reminder</code>	Reminder: your call is {{1}}. Need to reschedule? Call {number}. Reply STOP to opt out.
<code>_follow_up</code>	Hi, this is {business} following up on your message. Reply here and we'll pick up the conversation. Reply STOP to opt out.

{name}, {number} and {business} are fixed text you write in; only {{1}} changes per message. The last one exists for a person who answers after 24 hours (page 14).

SUBMIT THEM ALL AT ONCE

Twilio says approval "usually" takes 48 hours or less, **per template**. Submitted one at a time, the waits stack. Keep the wording identical to the SMS versions so both channels say the same thing; drop the brand prefix SMS needs, because WhatsApp shows the sender's name. Meta may move a template to Marketing if it reads as promotional — keep it purely transactional.

The templates already in a new account (order tracking, welcome...) are Twilio samples. Ignore them.

N8N + SLACK

Automation first. A person only when it cannot cope.

Three small n8n workflows, one job each. To the customer it is an ordinary WhatsApp chat; nothing shows that Twilio or n8n are involved.

WORKFLOW	DOES
WhatsApp Inbound	Webhook from the sender. Answers Twilio with empty TwiML, then posts to a private Slack channel: one thread per person , later messages added to it and echoed to the channel so none are missed. The person→thread map is kept in the workflow's own static data
Delivery Status	The status callback. Stays quiet on success; posts to Slack only when a message fails or is undelivered
Reply from Slack	Slack posts every thread reply here. It reads the number off the thread's first message, asks Twilio when the person last wrote, and sends the reply as typed inside 24 hours, or the follow-up template outside it — and says which in the thread

Connect Slack

- 1 A **private channel** for texts, separate from the one for leads, with the bot invited
- 2 `api.slack.com/apps` → the app → **Event Subscriptions** on → Request URL = the reply workflow's webhook. Slack checks it immediately: the workflow must answer the `url_verification` challenge
- 3 **Subscribe to bot events** → `message.groups` (messages in private channels). Save, and reinstall the app if asked

THREE DETAILS THAT PREVENT REAL DAMAGE

Ignore Slack retries (X-Slack-Retry-Num): Slack resends if it waits over 3 seconds, and a retry would message the customer twice. **Ignore the bot's own posts**, or its confirmations loop. **Verify Slack's request signature** with the app's Signing Secret: the webhook is a public address, and without the check anyone who finds it can make the business send messages.

SLACK IS ONE INBOX, NOT THE INBOX

The person in the loop is the exception: most messages are confirmations, reminders and STOPS that need nobody. Slack suits a small team that already lives in it. A business with staff answering chats all day wants a shared inbox such as **Chatwoot** (open source, self-hostable) or the helpdesk or CRM it already uses — the same webhooks feed any of them.

Keep a 30-minute margin on the window (we use 23.5 hours), and never send a blank Body or ContentSid — use two send nodes behind a branch instead.

WHAT IT COSTS, AND WHAT DONE MEANS

Cents per message, and a list to finish on.

Every WhatsApp message is charged twice: once by Twilio for carrying it, once by Meta. Meta's prices move every quarter; re-check both rate pages before quoting.

CHARGE	AMOUNT
Twilio	\$0.005 per message , sent or received (Twilio's WhatsApp pricing page, read September 2026)
Meta, templates	Per delivered template, by category and the recipient's country. Utility is the cheap one
Meta, inside the 24-hour window	Replies sent within 24 hours of the customer's last message were free until 30 September 2026. Since 1 October 2026 Meta charges for those too, per message
Setup	Nothing from Meta or Twilio. The number and the Messaging Service already exist from the SMS build

Done means

- ☐ Portfolio filled in, domain verified, a second admin added
- ☐ Sender **ONLINE** when read through the API, not just in the console
- ☐ Profile photo and about text set; the two data-sharing boxes unticked
- ☐ Advanced Opt-Out on; a real STOP answered and shown in your own list, then START
- ☐ Webhooks on the sender; a failed send seen in Slack
- ☐ Every template approved, read back through the API
- ☐ A real message in, a thread in Slack, a reply out, status read
- ☐ A reply after 24 hours sends the follow-up template, not the text
- ☐ Slack signature verified; retries and bot posts ignored
- ☐ Business verification done, or knowingly parked with the reason written down

THE HABIT BEHIND EVERY STEP

Read the object back. A success screen, a 200 or a message ID proves nothing; the sender's status, the template's approval and the message's delivery do.