techspawn



# How to integrate WhatsApp with Odoo 17?

# How to Seamlessly Setup **WHATSAPP** in Odoo 17?

WhatsApp is an instant messaging app that enables users to share content, make calls, and send messages. Odoo integrates WhatsApp Business Account (WABA) with its database, allowing businesses to receive and reply to messages directly from Odoo. Key features include creating new templates with dynamic variables, sending quotations from the Sales app, receipts and invoices from the Point of Sale app, and tickets from the Events app. Administrators need to configure the connection between Odoo and Meta, WhatsApp's parent company, to set up a WhatsApp Business account.

#### How to Configure WhatsApp in a Meta

To integrate WhatsApp with Odoo, build a normal API connection on Meta using the procedures below:

1. Create a Meta business account- Head over to Facebook Business Manager and create a business account.

- 2. Create a Meta developer account- Sign up on Meta's developer console
- 3. In the developer console, create a new app and add WhatsApp to it.
- 4. Test the API connection to make sure everything is working smoothly

#### How to setup a Meta Business Account

To create a Business account with Meta (owner of Facebook) navigate to: Facebook Business Manager.

Begin by clicking Create account and then enter the business name, the administrator's name, and a work email address. Then click Next, and a pop-up window will appear prompting to

confirm the email address. After confirming, click Done to close the window.

Next, follow the instructions in the email sent by Facebook to confirm the creation of the business account and to complete the setup process.

	facebook
	Create a new account It's quick and easy.
	First name     Surname
	Mobile number or email address New password
	Date of birth ●           31         ✓           Jan         ✓           2024         ✓
	Gender @ Female O Male O Custom O
	respe who use our service may have upposed your contact information to Facebook. Learn more. By circled and the service of the service se
	Sign Up Already have an account?
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Sign Up Log in Messenger Facebook Threads Fundraisers Services Voting I Cookles AdChoices(> Terms Heip	.tte Video Places Games Marketplace Meta Pay Meta Store Mete information Centre Privacy Policy Privacy Centre Groups About Create : Contact uploading and non-users

#### **Create Whatsapp Business**

Account link: https://www.facebook.com/business/help/1710077379203657? id=180505742745347.

To set up a WhatsApp Business Account (WABA) for smooth integration with Odoo, follow these steps to configure your account and link it to your Odoo database.



- 1. Go to https://business.facebook.com/overview
- 2. Click on "Create an account."
- 3. Enter your business name, your name, and your work email address, then click "Next."
- 4. Fill in your business details and click "Submit."



#### App creation

Visit the Meta for Developers Dashboard: https://developers.facebook.com/ Log in with your Meta developer account. If you don't have one yet, link your Facebook account to create it.



Connect with customers and improve efficiency with our featured platforms

After signing in, click on "My Apps" in the top right corner. This will show you all the apps you've created. Click on "Create App" to start the process of making a new Meta application. Select the 'Other' option and click 'Next' to continue.



#### App type

On the "Create an app" page, select "Other" under the section labeled "Looking for something else?" and click "Next." You'll be directed to a new page. Here, choose the first option under "Select an app type," titled "Business." This is the key for managing the WhatsApp API. Click "Next" to start configuring your app. You'll be guided through the process step-by-step.

🕫 Meta for Developers				Docs	Tools	Support	Apps Q Search	A	- 👩 -
	Create an app					imes Cancel			
	O Type	Select ar The app typ	n app type be can't be changed after your app is created. Learn more						
		*	Consumer Connect consumer products and permissions, like Facebook Login and Inst	tagram Basic I	Display to	your app.			
			Business Create or manage business assets such as Pages, Events, Groups, Ads, Mer Graph API using the available business permissions, features and products.	ssenger, What	sApp and	Instagram			
		•	Instant Games Create an HTML5 game hosted on Facebook.						
		P	Gaming Connect an off-platform game to Facebook Login.						
		ଭ	Workplace Create enterprise tools for Workplace from Meta.						
			Academic research Connect to Facebook data and tooling to perform research on Facebook.						
						Next			
								Rate your	experience Bad

Fill in the details for your app. This part is like giving your app its identity.

#### App Details

In the "Details" section of the "Create an App" process, type "Odoo" in the field under "Add an App name." Enter the developer's email address in the field under "App contact email." This ensures you can be contacted if needed.

Use the drop-down menu to select your Meta business account in the "Business Account – Optional" field. This links your app to your business profile. Finally, click "Create app" to complete the process.



∞ Meta for Developers			Docs Tools	Support	Apps Q Search	🔺 👩 -
Ci	reate an app			imes Cancel		
	Type Details	Add an app name This is the app name that will show on your My Apps page and associated with your app ID. You can cl odco	hange the name later in Se	ttings. 4/30		
		App contact email This is the email address we'll use to contact you about your app. Make sure it is an address you check policies, app restrictions or recovery if your app is deleted or compromised.	k regularly. We may contac	t you about		
		Business Account - Optional Connecting a Business Account to your app is only required for certain products and permissions. You Account when you request access to those products and permissions.	'll be asked to connect a B	usiness •		
		By proceeding, you agree to the Meta Platform Terms and Developer Policies.	Previous	Create app		
						Rate your experience Good Bad

This action will create the app and prompts the Meta Platform Terms and Developer Policies agreements.

To accept the agreements, enter the Facebook password for security purposes, and click Submit to finalize the app creation. The browser will then direct to the Meta for Developers dashboard.

#### How to Add a WhatsApp Product to the App ?

After developing the app's core structure, the following step is to add a product. Access the Meta app dashboard at https://developers.facebook.com/apps and pick the app to configure. Proceed to the following page and, provided that WhatsApp will be used, click on 'Set up' next to the box relating to WhatsApp, located toward the bottom of the page. The website then sends you to the WhatsApp Business Platform API settings page. Use the drop-down menu to choose the Meta business to setup for the Select a Meta Business Account option, and then click Continue to confirm your choice.



Start using the WhatsAppAPI

After finishing the previous WhatsApp product wizard, and clicking Continue, the browser should have directed to the WhatsApp Quickstart page; this Quickstart page is where to begin configuring the WhatsApp API by adding a phone number and then sending an initial test message.

🕫 Meta for Develop	pers ≡ Ap	pp Dashboard Docs Tools Support Apps	s Q Search
Odoo	<ul> <li>App ID</li> </ul>	D: App Mode: Development 💽 Live App type: Business	(?) Help
Dashboard		Temporary access token	
$\mathbf{V}_{\mathbf{F}}$ Required actions		(Li Copy O Refresh This token will expire in 23 hours.	
<ul><li>⟨ŷ⟩ App settings</li></ul>	~	Send and receive messages	
App roles	~	Step 1: Select phone numbers	
🗘 Alerts	~	From Send free messages with the provided test phone number. You can use your own phone number which is subject to limits and pricing. Learn	more.
App Review	~	Messaring may be unavailable. Excise Issue	
Products	Add Product	Phone number ID: (D) WhatsApp Business Account ID: (D)	
Webhooks		To	
Quicketart	^	US +1  Phone number	
API Setup		Step 2: Send messages with the API	
Configuration		To send a test message, copy this command, paste it into Terminal, and press enter. To create your own message template, click here.	
Partner Solutions			
E Activity log			
		🖸 Run in Postman Send mes	sage
		Step 3: Configure webhooks to receive messages	
		Create a custom webbook LIRL or use services that help you setup an endpoint. Configure webbooks	

#### API Setup

After setting up your API and creating a test number, it's time to confirm that everything is working smoothly by sending a test message. Here's how:

**1. Navigate to the API Setup Page:** Start by going to the "Send and receive messages" section. You'll find a drop-down menu next to "To" under Step 1. Click on it and select "Manage phone number list. "

**2. Add Phone Numbers for Testing:** You can add up to five phone numbers to receive test messages. Just enter the country code and the phone numbers, then click "Next."

**3. Verify the Phone Number:** WhatsApp Business will send a verification code to the number you provided. Enter this code on the next screen to verify ownership of the number, then click "Next".

**4. Send a Test Message:** Now, it's time to send a test message. Under Step 2, find the "Send messages with the API" section and click on "Send Message." This will send a test message to the verified phone number.

Once you've successfully received the test message, you're all set to move on to configuring webhooks for real-time message management.

## How to Configure WhatsApp in Odoo?

To set up WhatsApp in Odoo, you'll need to configure some key values within the Odoo database. Here's a simple guide:

#### Navigate to WhatsApp Configuration in Odoo:

Go to the WhatsApp app, then select Configuration and WhatsApp Business Accounts. Click New to start configuring your account.

#### Get Required Details from Meta Developer Console:

In another browser tab, go to Facebook for Developers, navigate to My Apps > WhatsApp > API Configuration. Copy the token, phone number, and account ID values from the Meta developer console.

#### Enter Values in Odoo:

Paste the copied values into the corresponding fields in Odoo. These details are crucial for creating a Callback URL and Webhook Verify Token, which are needed to set up webhooks for receiving messages.

#### **Test the Connection:**

Click Test Connection in Odoo. If everything is set up correctly, you'll see a green success message in the upper-right corner of the dashboard.

This process will ensure that your WhatsApp business account is properly configured in Odoo, allowing you to manage communications directly from the platform.

Name	Meta Console	Odoo Interface
Phone	Phone number ID	Phone Number ID
Token	Temporary access token	Access Token
App ID	App ID	App ID
Account ID	WhatsApp Business Account ID	Account ID
WhatsApp Templates Messages Configuration		📌 🕫 🗴 Demo Company 👹
New New O	∑ Templates	*
Name Odoo		Send message Log note Q 🗞 🛆 $^\circ$ Follow
Sending messages 😧 This configuration is for sending the WhatsApp		Today           Mitchell Admin - now           Creating a new record
Phone Number ID 📀	Account ID	
1234567890	123456789	
Access Token 😧	App Secret	
App ID 😧		
123456789		
<ul> <li>C Sync Templates</li> <li>→ Test Connection</li> </ul>		
Receiving messages <b>?</b> This configuration is for receiving the WhatsApp messages.		
Callback URL 🕖	Webhook Verify Token	
Сору	К сору	
Control Notify users and company where this account can be used		
Notify users ?	Allowed companies	

### Conclusion

Integrating WhatsApp with Odoo 17 can significantly enhance your business communication by allowing seamless interaction with customers directly from the Odoo platform. By following the steps outlined—creating a Meta business account, setting up a developer account, configuring the app, and linking it with WhatsApp—you can ensure that your business operations are streamlined and efficient.

For a seamless integration and to follow the detailed steps, contact Techspawn or reach out to us at **sales@techspawn.com** to learn more about our additional services in Odoo integration and Odoo implementation. We are here to assist you in making the most out of your Odoo and WhatsApp integration.