

Whatsapp Integration With ERPNext (For Developers):

Introduction :

This guide provides a step-by-step approach to integrating WhatsApp with ERPNext. This integration enables you to send WhatsApp messages from documents like Sales Orders or Sales Invoices and manage message logs. It also covers configuring the necessary settings and templates.

Prerequisites :

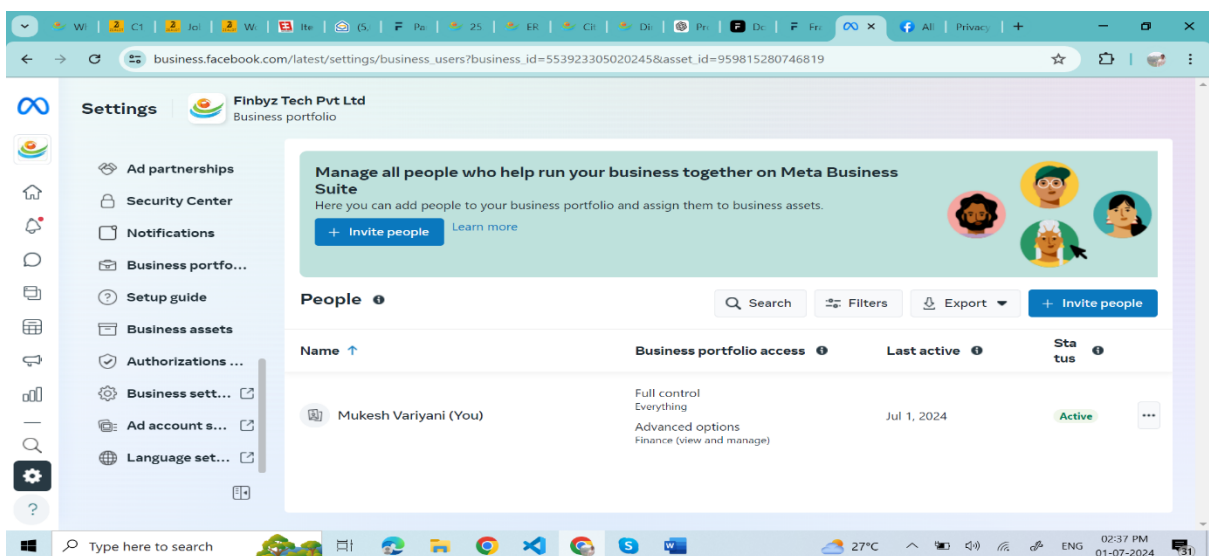
- A Meta Business Account
- A WhatsApp number without an active WhatsApp service
- Access to ERPNext

Step 1: Open WhatsApp Settings in ERPNext

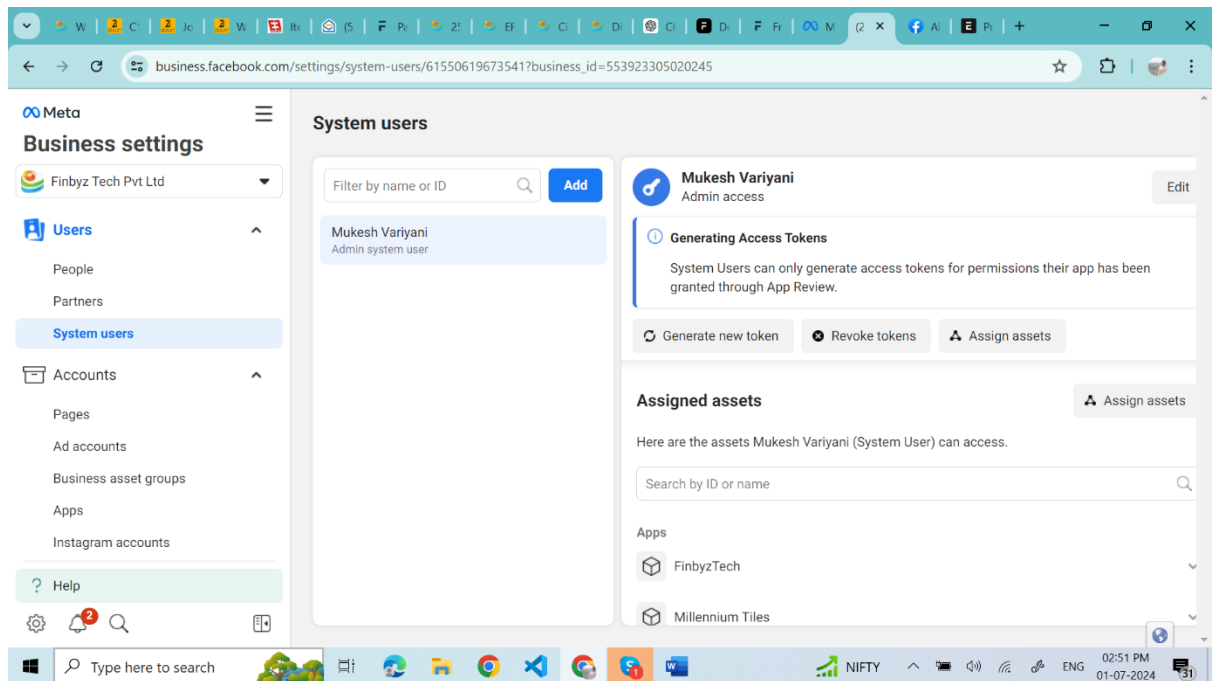
1. Navigate to the WhatsApp Settings Doctype in ERPNext.
2. Fill in the following information:
 - **Token**
 - **URL**
 - **Version**
 - **Phone ID**
 - **Business ID**
 - **Webhook Verify Token**

Step 2: Obtain Access Token from Meta

1. Open [Meta Business Suite](#).
2. Go to the menu and click on the three dots.
3. Click on **Business Settings**.



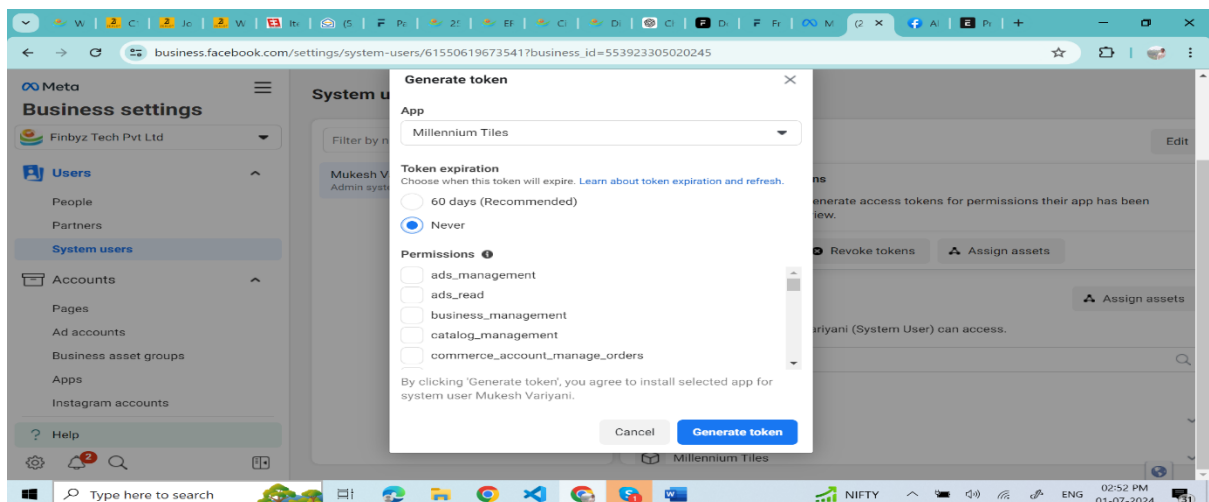
4. Enter your two-factor authentication code.
5. Navigate to **Users**.
6. Click on **System Users**.
7. Click on **Generate New Token**.



8. Select the app.
9. Click on the option **Never**.
10. Select the following permissions:

- whatsapp_business_messaging
- whatsapp_business_management

11. Click on **Generate Token**.

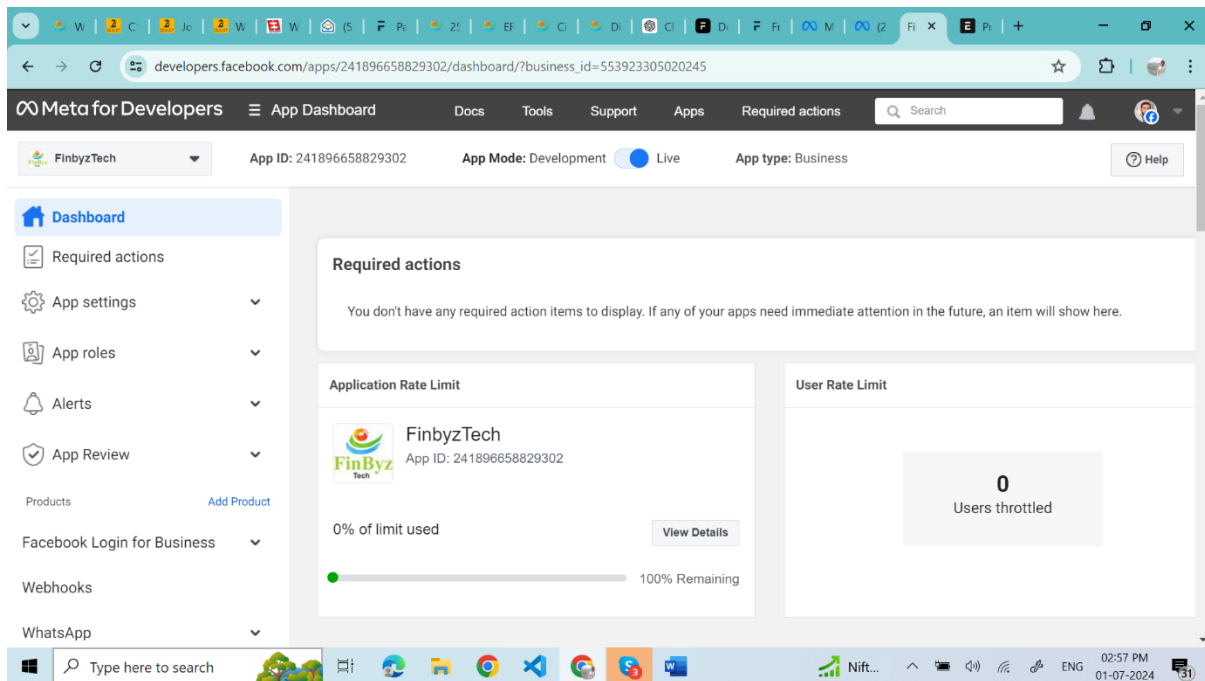


When you click on generate new token, a token will create, copy that token and paste it in WhatsApp settings in ERP Next.

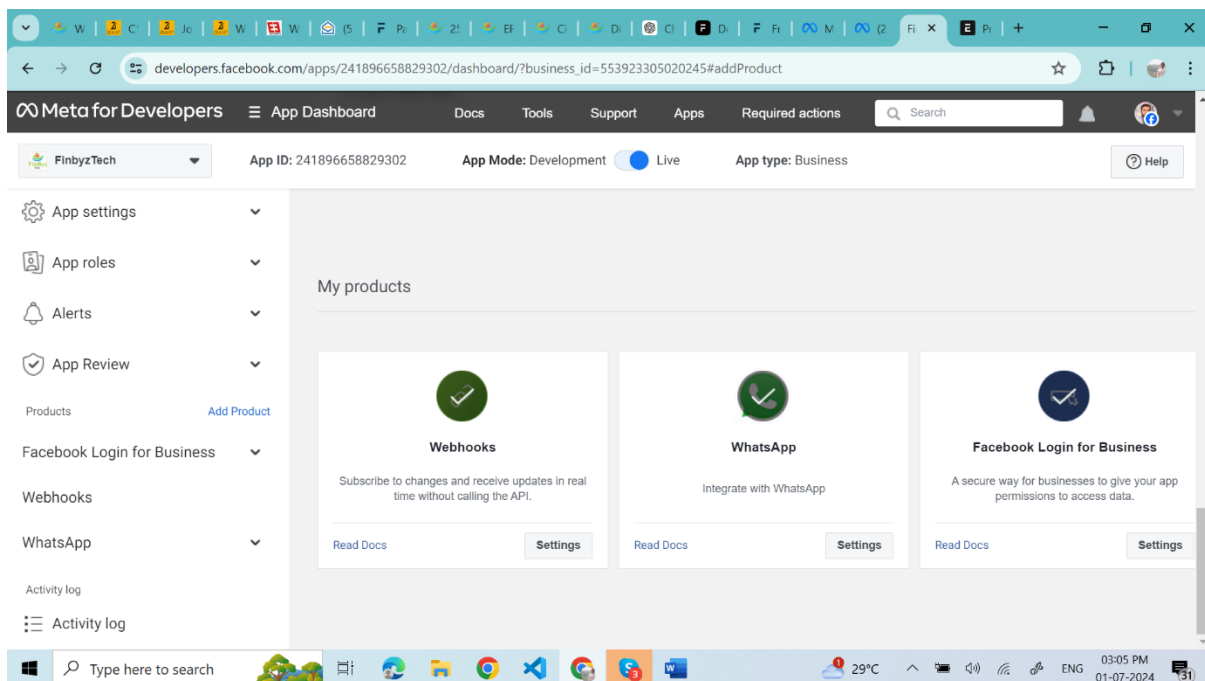
12. Go to the Developer Console.

13. Enable **App Mode to Live**.

In point no 8. App is only showing if you created in developers.facebook.com. So this app is created before point no 8.



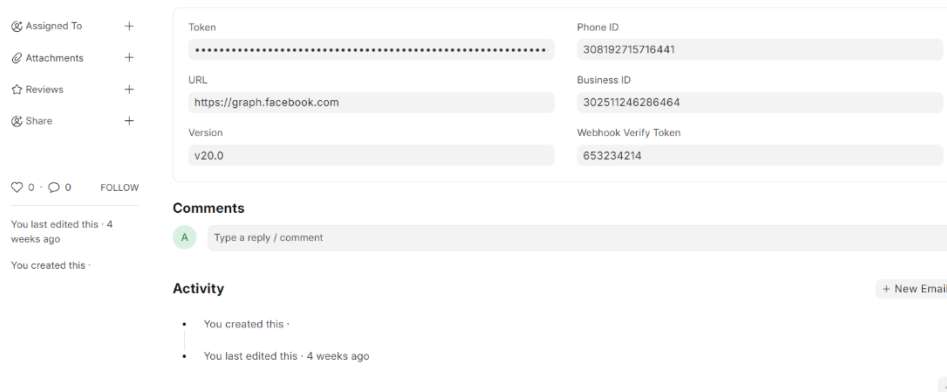
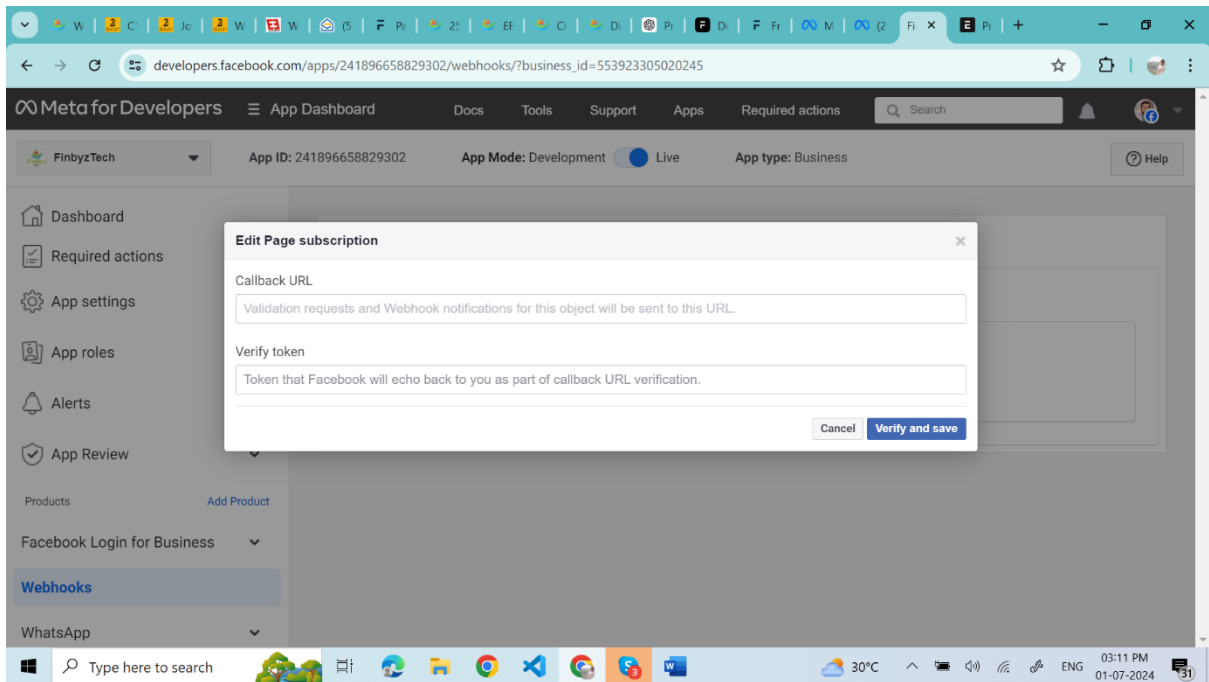
14. Go to **Add Products** and set up WhatsApp.



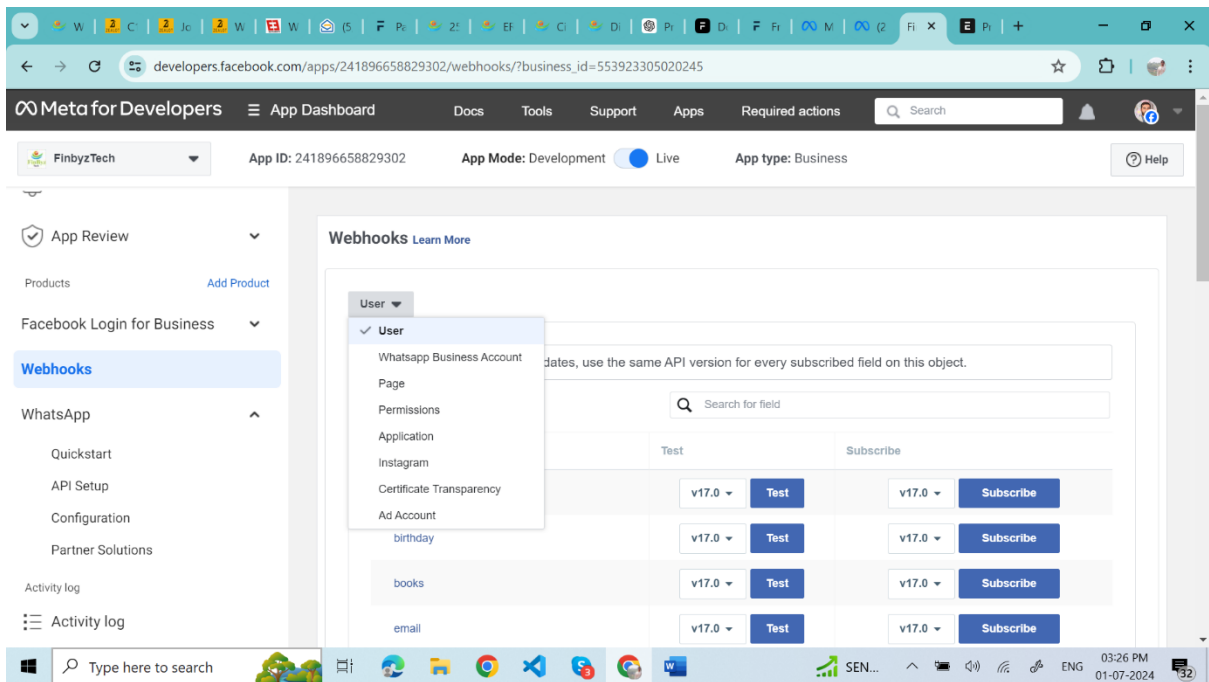
Step 3: Set Up Webhook Token

1. Open [Meta Developer Console](#).
2. Click on **Webhooks**.
3. Click on **User Object Subscription**.
4. Add the callback URL:

`https://finbyz.tech/api/method/whatsapp_erpnext.utils.webhook.webhook.`



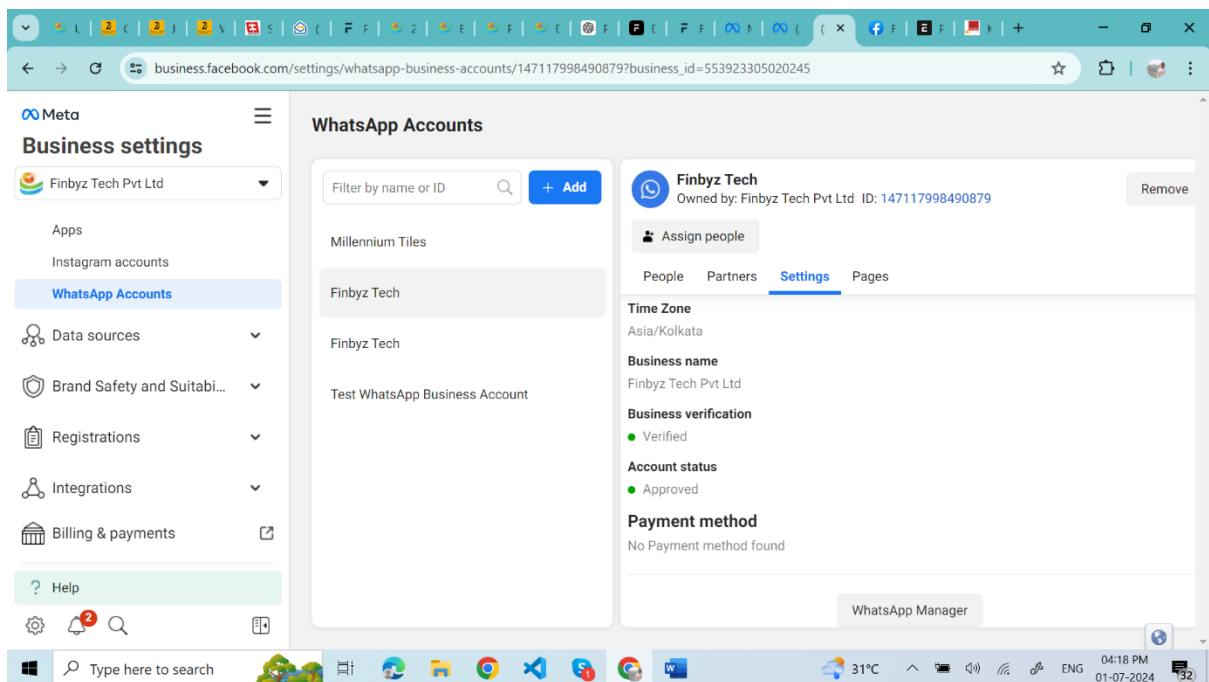
5. Use a random number as the Webhook Verify Token(653234214), which should be the same as in the WhatsApp settings UI.
6. Click on **Save**.
7. Open **Users**.
8. Click on **WhatsApp Business Account**.



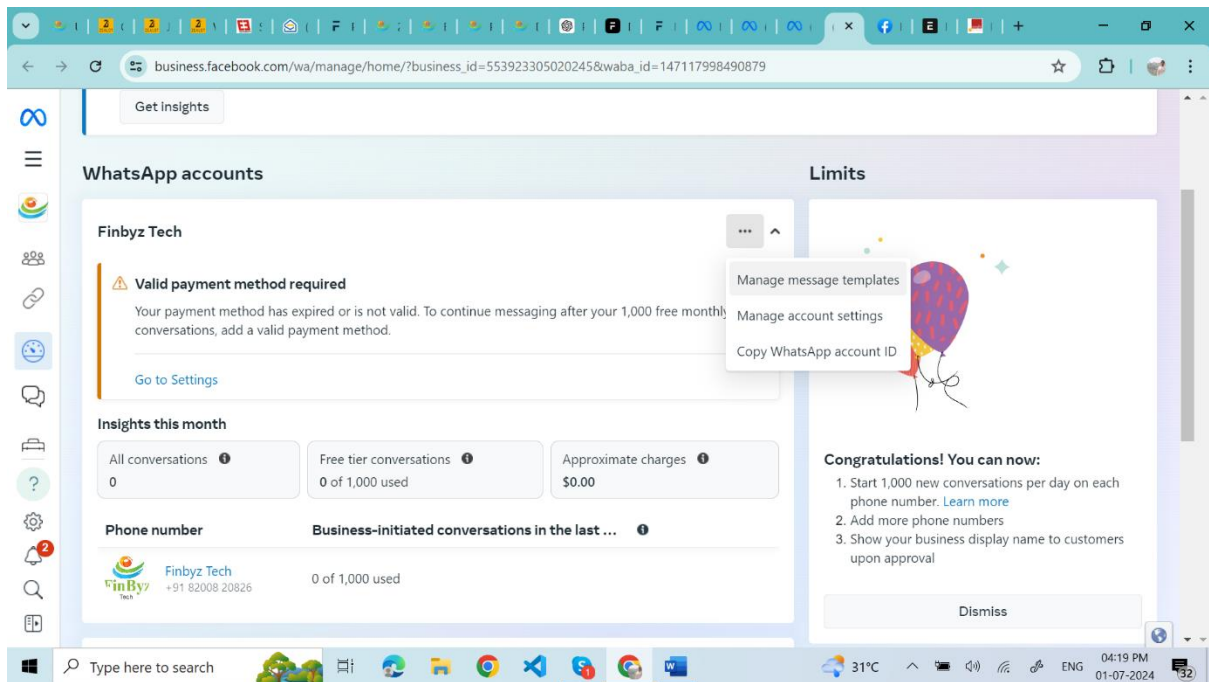
9. Subscribe to the services you want to use.
10. Click on **Save**.

Step 4: Configure WhatsApp Template in Meta

1. Fill in the required information:
 - Go to [Meta Business Suite](#).
 - Open the menu and click on **WhatsApp Manager**.



- From the list of WhatsApp accounts, click on the three dots.



- Click on **Manage Message Templates**.
- Create a new template by clicking on Create template.

Whatsapp Integration With ERPNext (For Users):

Step 1: Install WhatsApp Integration App

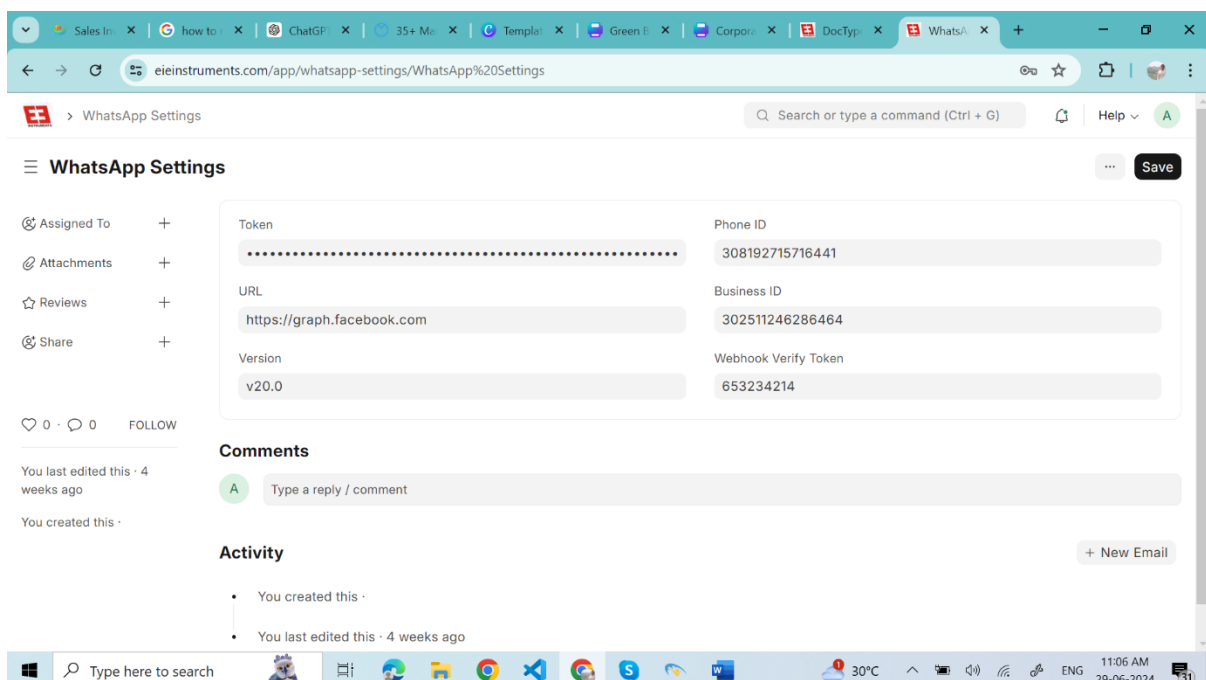
Steps:

- 1. Log in to ERPNext:**
 - Go to your ERPNext instance and log in with your credentials.
- 2. Install the App:**
 - Install Whatsapp Integration app in ERPNext.
- 3. Verify Doctypes:**
 - Once the installation is complete, the following doctypes will be automatically created:
 - **WhatsApp Message:** Logs all WhatsApp messages sent from ERPNext.
 - **WhatsApp Message Field:** Used in notifications to select fields from Sales Orders or Invoices for sending data in WhatsApp messages.
 - **WhatsApp Settings:** Stores access keys and configurations required for WhatsApp integration.
 - **WhatsApp Template:** Fetches and stores templates created in Meta for sending structured messages.

Step 2: Set Up WhatsApp Settings in ERPNext

Steps:

- 1. Navigate to WhatsApp Settings:**
 - Go to ERPNext and navigate to the "WhatsApp Settings" Doctype.
- 2. Enter Access Details:**
 - Enter the access details obtained from Meta (Token, URL, Version, Business ID, Phone ID, Webhook URL).
 - Save the settings.



The screenshot shows the 'WhatsApp Settings' doctype in ERPNext. The page is titled 'WhatsApp Settings' and includes a search bar and a 'Save' button. The settings are organized into a table with the following fields:

Field	Value
Token
Phone ID	308192715716441
URL	https://graph.facebook.com
Business ID	302511246286464
Version	v20.0
Webhook Verify Token	653234214

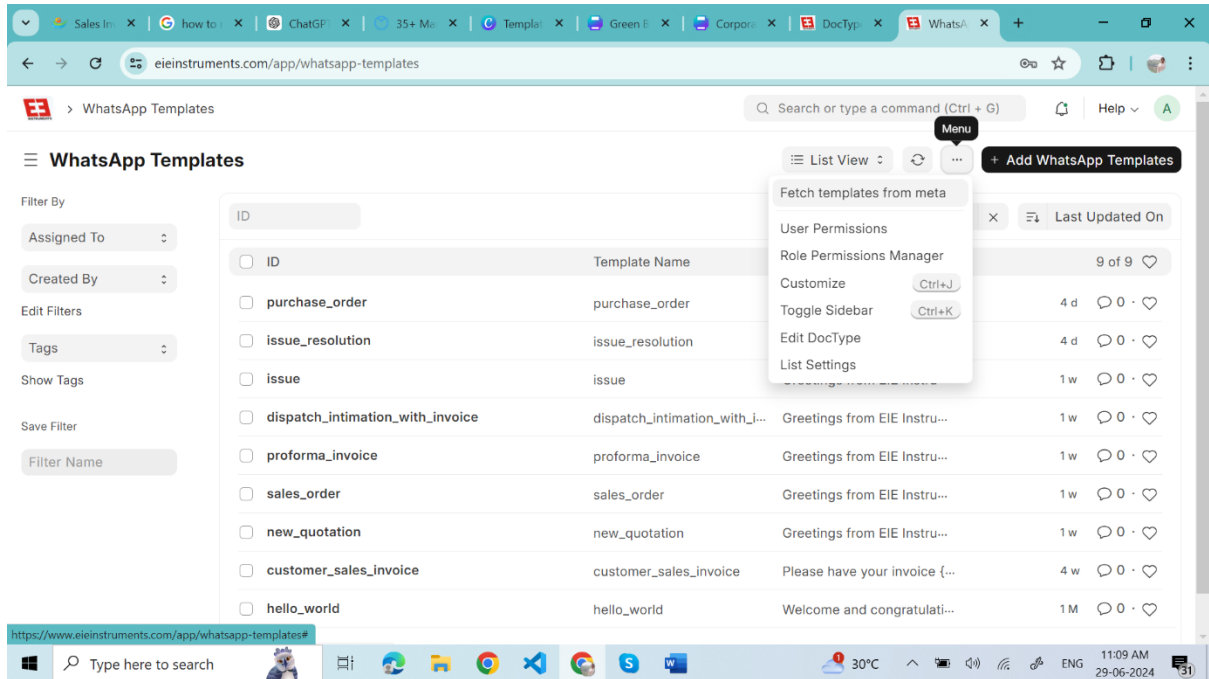
Below the settings table, there is a 'Comments' section with a text input field and a 'New Email' button. The 'Activity' section shows a list of actions, including 'You created this' and 'You last edited this - 4 weeks ago'.

Step 3: Create and Fetch WhatsApp Templates

Steps:

1. Fetch Templates in ERPNext:

- Go to the "WhatsApp Template" Doctype.
- Use the Fetch function to import templates from Meta.
- Verify and save the fetched templates.



Step 4: Configure Notifications for WhatsApp Messages

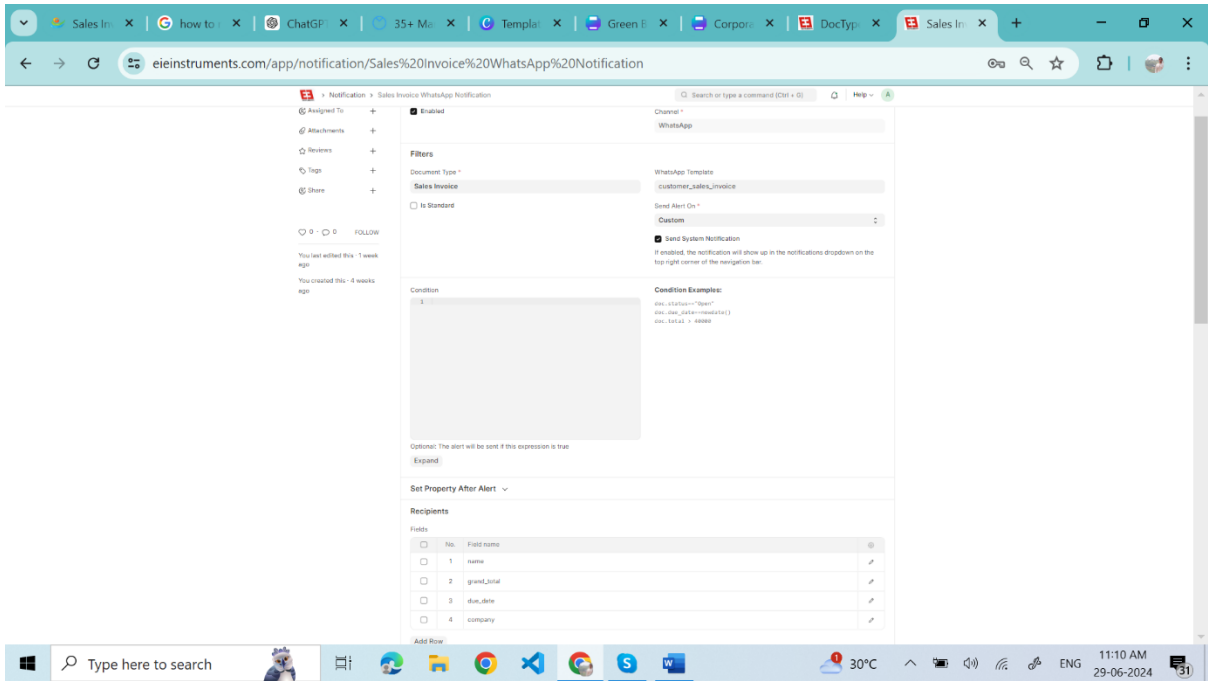
Steps:

1. Go to Notification Settings:

- In ERPNext, navigate to the Notification settings.

2. Create or Edit Notification:

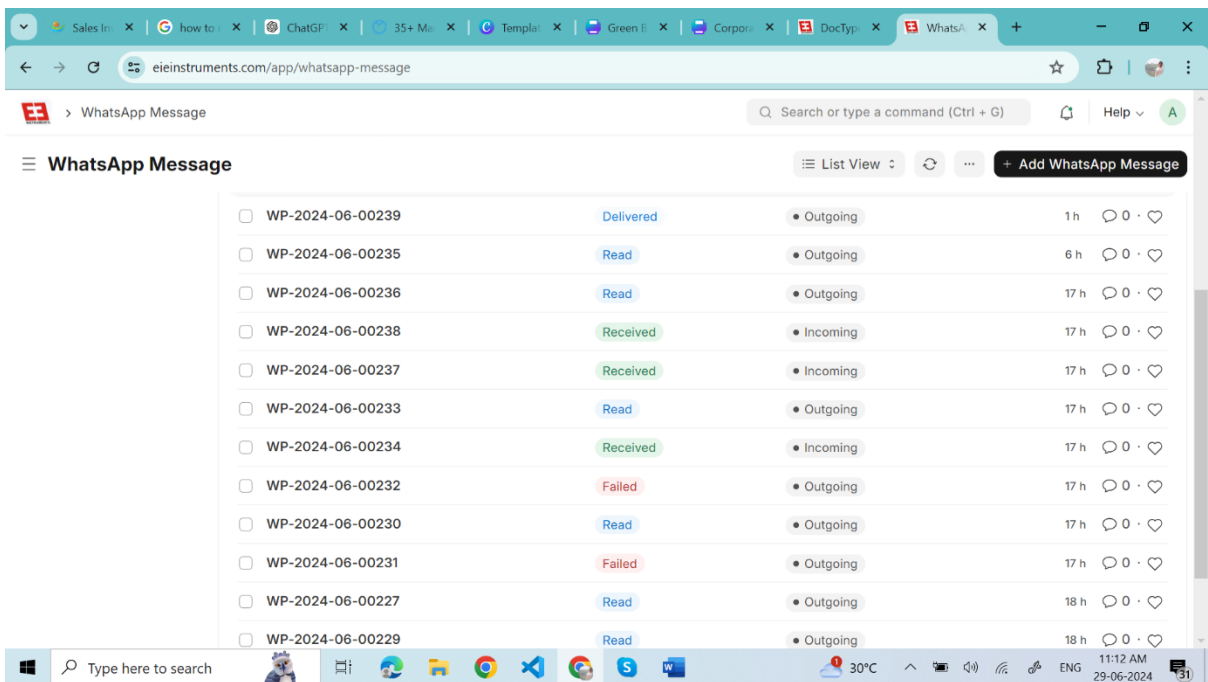
- Create a new Notification or edit an existing one.
- Add a child table linking to the "WhatsApp Message Field" Doctype.
- Select fields from Sales Orders or Invoices that you want to include in the WhatsApp message.
- Save the Notification.



Step 5: Sending WhatsApp Messages

Steps:

1. **Open a Document:**
 - Open a Sales Order or Sales Invoice.
2. **Send WhatsApp Message:**
 - Click on the Menu Icon to send a WhatsApp message.
 - Choose the appropriate template and verify the message content.
 - Send the message.
 - Verify that a log entry is created in the "WhatsApp Message" Doctype.



Step 7: Replying to WhatsApp Messages

Reply to Message:

1. Click On Reply button and fill Mobile no, Content type and message.

The screenshot shows the 'WhatsApp Message' details page for ID 'WP-2024-06-00234'. The message is 'Received' and is from the mobile number '919974532208'. The message content is: 'Welcome to AUM ENGINEERS Your inquiries are important to us. Please find our contact details below: Inquiries: 9974532208 Accounts: 9624841410 Dispatch: 7203054164 Thank you for contacting us. We look forward to serving you.' The page includes a sidebar with options like 'Assigned To', 'Attachments', 'Reviews', 'Tags', and 'Share'. At the bottom, there is a 'Comments' section with a text input field.

This screenshot shows the same WhatsApp message details page, but with a 'New WhatsApp Message' modal window open. The modal contains the following fields: 'Label' (empty), 'To' (919974532208), 'Content Type' (dropdown menu), and 'Message' (text area with a 'Preview' button). There are 'Edit Full Form' and 'Save' buttons at the bottom of the modal. The background page is dimmed.

Conclusion

WhatsApp with ERPNext, allowing seamless communication with your customers directly from your ERP system. This integration ensures that all message logs are maintained, relevant data is sent efficiently, and you can respond to customer inquiries promptly.