



WhatsApp Business for Global Relay

Configuration Guide

January 2023

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Overview

The purpose of this document is to ensure your company's administrators are well informed on how they will contribute to enabling your employees' access to WhatsApp Business for Global Relay.

Global Relay, through our integration with Meta, will manage all the complexities of the WhatsApp administration process on your behalf.

In order to do this effectively, your administrators must give Global Relay permission to manage your company's WhatsApp Business Accounts (WABAs).

WABAs are the containers used by Meta/WhatsApp to represent your company or multiple Lines of Business (LOB).

BYOD, landline, and corporate numbers (mobile or landline) are managed by Global Relay (not in the Meta portal).

Once completed, your employee accounts are identified as WhatsApp Verified Business Accounts.

Use this Guide and work with your assigned Global Relay representative to configure your WhatsApp Business account in 4 steps:

Step 1: [Register Your Company with Meta](#)

Prerequisite: The administrator registering your company with Meta must use a personal Facebook account. Meta owns both Facebook and WhatsApp, and a personal Facebook account is required to create your Meta Business Account as well as log in to the Meta Portal.

Once your company is registered, the administrator add additional administrators to manage your Meta Business Account in the Meta Portal.



Note: The personal Facebook account is used only to register your company and administer the Meta Business Account. Personal Facebook data remains private with access controlled by its owner.

Step 2: [Confirm Your LOB\(s\) Structure with Global Relay](#)

Step 3: [Approve Your WhatsApp Business Account \(WABA\) with Meta](#)

Step 4: [Global Relay Activates Your Service](#)

Upon completion of these steps, WhatsApp Business will be available in the Global Relay App.

Step 2: Confirm Your LOB(s) Structure with Global Relay

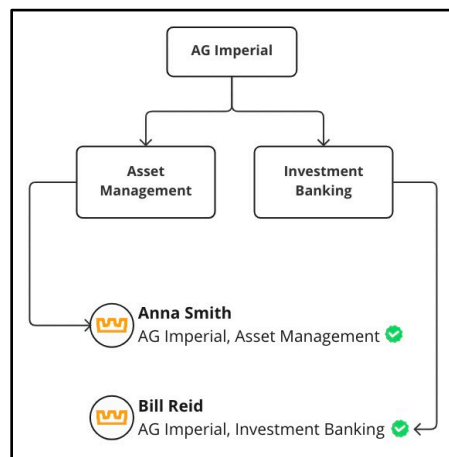
Provide Global Relay with details that represent your company or multiple Lines of Business (LOB), so we can set up, manage, and support your WhatsApp Business for Global Relay onboarding and ongoing administration.

Your customer views your logo, company, and descriptor (typically a Line of Business) in their WhatsApp client. For example: **[Logo] AG Imperial, Asset Management**.


Reflecting Your Business: Provide Global Relay with the following:

<ul style="list-style-type: none">• Company Logo: maximum size: 1080 x 1080 and 125KB; minimum size: 32 x 32.• Company Display Name• Company Disclaimer: maximum size 600 characters	<ul style="list-style-type: none">• Company Templates• Line of Business descriptor for each LOB: maximum size 255 characters• Business/Company description (Optional): maximum size 512 characters
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Global Relay will set these items up for you, so they display for your customers as per WhatsApp guidelines.



- **Employee Phone Numbers:** Global Relay will configure each employee (in the Global Relay App) with their phone number (BYOD, landline, corporate numbers) under their LOB.
 - BYOD numbers are provisioned (provided or ported) by Global Relay giving you ownership and control as employees transition between Lines of Business or leave the company.
 - Landline numbers (North America +1 only) are Text and WhatsApp enabled by Global Relay without disruption to your desktop number and phone plan.
 - Corporate numbers (landline and/or cellular) are WhatsApp enabled by Global Relay.

 **Notes:** Android Text can be captured by the Global Relay App. Alternatively, Global Relay can capture iOS and Android Text via telco/carrier.

Step 3: Approve Your WhatsApp Business Account (WABA) with Meta

Using the information provided, Global Relay creates the required WABA(s) each of which must be approved by your Meta Administrator in the Meta Business Portal.

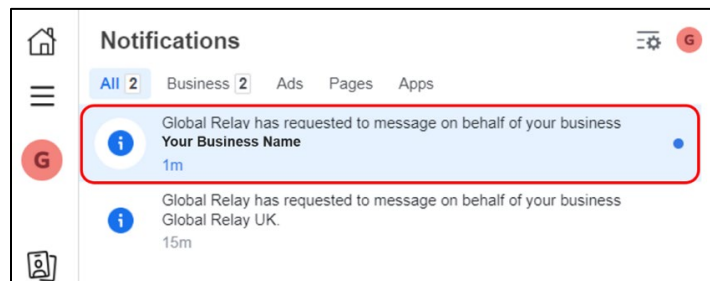
Your Meta Administrator: Provide Global Relay with your Meta Administrator's contact information including their email address), as they will be notified (by Global Relay) when they are required to approve a WABA in the Meta Business Portal.

WABA Approval Steps:

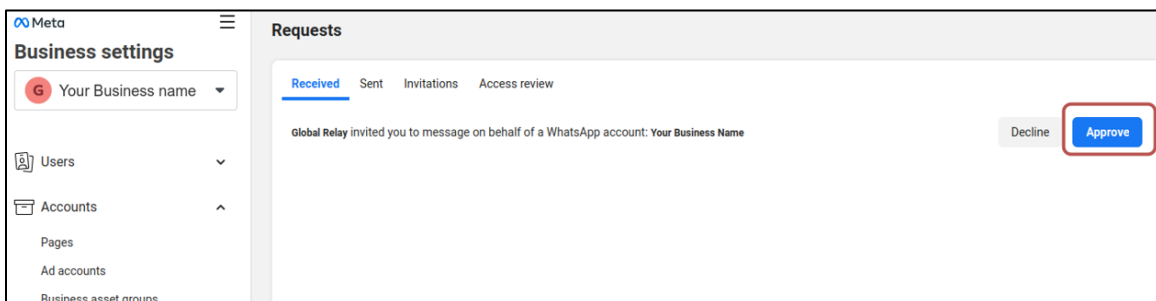
1. When Global Relay creates a new WABA:
 - o Global Relay sends an email to your Meta Administrator.
 - o Meta sends an email to your Meta Administrator and adds an alert to your Meta Business Portal Account Notifications icon (as per below)
2. Go to the [Meta Business Portal](#) and click the **Notifications icon** to view the WABA request.



3. On the Notifications page, click the **Notification** to open each request.



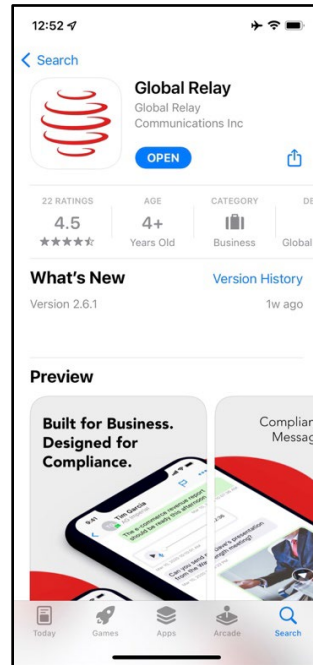
4. On the Requests page (in the Received tab), click **Approve**.
If necessary, repeat this step for each request.



Step 4: Global Relay Activates Your Service

For each approved WABA, Global Relay provisions the [phone numbers](#), assigns them to the appropriate employee and ensures they are approved and verified by WhatsApp.

Your employees can start using WhatsApp for Business in the Global Relay App (iOS, Android, and desktop).



For instructions on starting a WhatsApp conversation in the Global Relay App, consult the [Global Relay Help Center](#).

Glossary

This glossary defines terms and abbreviations associated with WhatsApp Business for Global Relay.

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#)

A

Android

An open-sourced operating system used for smartphones and tablet computers.

Android Text

SMS messages sent on an Android device. There is feature in the Global Relay App, purpose-built to archive text messages and call logs using the native number on your Android device.

B

Business Manager ID

A 16-digit number that uniquely identifies your business in Facebook.

BYOD

Bring your own device. The practice of allowing employees to bring their own smartphones or other devices for work purposes instead of having to issue them a corporate mobile device.

C

Contacts

A saved list of users and their information with whom you can initiate chats or conversations.

Corporate Phone

A landline or cellular device issued to an employee by the company. You can route WhatsApp messages to a corporate phone number.

D

Desktop

The Global Relay App client installed on a desktop computer.

Disclaimer

A message that displays in WhatsApp Business and WhatsApp Business for Global Relay, identifying either:

- The message has been securely sent from a business, with the option to opt of the conversation, report it to WhatsApp, or continue to the conversation.
- Information your company deems important, e.g. all messages in the conversation are being archived for compliance purposes.

G

Global Relay Archive

A hosted electronic information archiving platform that captures, indexes, encrypts, and preserves electronic communications data in a unified, online repository. Designed to meet the strict record-keeping requirements of the most heavily regulated and litigious industries, it automatically captures and preserves a company's communications in a massively scalable and secure cloud repository - creating a centralized record of who said what, when.

Global Relay App

A high-performance, cloud-messaging platform, purpose-built to meet the messaging, federation, compliance, privacy, and security requirements of the financial sector and other highly regulated industries.

I

iOS

An operating system used for mobile devices and tablets manufactured by Apple Inc.

L

Landline

A telephone connection that uses wires, versus a cellular network, which uses radio waves. You can register landlines and cellular devices to use WhatsApp.

Line of Business (LOB)

The way you structure your business to interact with your customers, e.g. trading desks, departments, geographies.

M

Meta

Meta Platforms, Inc., doing business as Meta and formerly named Facebook, Inc., and TheFacebook, Inc., is an American multinational technology conglomerate based in Menlo Park, California. The company owns Facebook, Instagram, and WhatsApp, among other products and services.

Meta Administrator

Someone who manages your Meta Business Account, with the ability to configure or modify Meta Business settings and permissions.

Meta Business Account

The account your company has set up to manage your Facebook Pages, Instagram profiles, Ad accounts, and other business assets. To use WhatsApp Business, your company must have a Meta Business Account.

P

Participants

Individuals included in a chat or email conversation.

S

Short Message Service (SMS)

A service used to send short messages from one mobile device to another, also referred to as a text message.

T

Template

A WhatsApp Business template is a standardized message that displays in a conversation initiated by a business. WhatsApp must approve your template. Global Relay will work on your behalf to get your template approved.

W

WhatsApp Business for Global Relay

WhatsApp Business for Global Relay is a service you can use to compliantly send WhatsApp Business messages to your customers from right within the Global Relay App.

Global Relay is a WhatsApp Business Solution Provider, providing a secure integration to the WhatsApp Business API to capture and archive your business communications.

WhatsApp Business Accounts (WABAs)

The accounts created to use WhatsApp Business within your company. Typically, you create WABAs to represent your company or multiple [Lines of Business](#) (LOB).

WhatsApp Business

A messaging application for businesses that facilitates interactions with customers by providing tools to automate, send, and quickly respond to messages.

WhatsApp Verified Business Account

For a company to communicate via WhatsApp Business, they must register their account with Meta and have Global Relay get it verified.