

THE BROKER TIMES

GUIDE 1 OF 5

Meta and WhatsApp setup

AI WhatsApp Agent Engine · thebrokertimes.com.au

This is the slowest part of the build and the only part with a queue you can't skip. Start it first, then do the Make work while Meta's verification runs.

Time: 30–45 minutes of your own work. Business verification can take Meta anywhere from a few hours to several days.

Before you start: the phone number decision

The number you connect **cannot be active on the normal WhatsApp app**. If you connect your existing business mobile, you must delete that number from consumer WhatsApp first, and you lose that chat history. That is a one-way door.

Three sane options:

1. **A new dedicated number.** Cheapest and safest. A prepaid SIM or a VoIP number that can receive an SMS or voice call for the one-time verification code.
2. **A landline.** Works — Meta can verify by voice call.
3. **Your existing business mobile.** Only if you have genuinely finished with WhatsApp on that number.

Whichever you pick, you need to be able to receive a verification code on it once.

Step 1 — Meta Business account

1. Go to business.facebook.com and create a Business portfolio if you don't have one.
2. Fill in the real legal entity name, the real address, and the website. These are checked.
3. Go to **Business settings** → **Business info** → **Start verification**.

You'll typically be asked for a document showing the business name and address — an ASIC extract, a rates notice, a utility bill or a bank statement in the entity name. Use something with the exact legal name, not the trading name.

Start this now. Everything else can be built while it's pending.

Step 2 — Create the Developer app

1. Go to developers.facebook.com → **My Apps** → **Create App**.

2. App type: **Business**.
3. Give it a name you'll recognise, and link it to the Business portfolio from Step 1.
4. On the app dashboard, find **WhatsApp** and click **Set up**.

You are now on the WhatsApp **API Setup** page. Keep this tab open — most of what follows comes from here.

Step 3 — Collect your credentials

From the API Setup page:

WHAT	WHERE	NOTES
Phone Number ID	API Setup, under the test number dropdown	A long number. Not the phone number itself.
WhatsApp Business Account ID	API Setup, just below	
App ID	App dashboard → Settings → Basic	
App Secret	App dashboard → Settings → Basic → Show	Treat as a password

You'll also invent a **Verify Token** later. It's any random string you make up — Make generates one for you, so don't worry about it yet.

The access token trap

The token on the API Setup page is **temporary and dies in about 24 hours**. Everyone gets caught by this: it works on Tuesday and is dead on Wednesday.

For anything real you need a permanent System User token:

1. **Business settings → Users → System users → Add**
2. Name it something like "WhatsApp Agent", role **Admin**
3. **Add assets** → select your app and your WhatsApp Business Account → grant **Full control**
4. **Generate new token** → select your app → set expiry to **Never**
5. Tick these permissions: `whatsapp_business_messaging` and `whatsapp_business_management`
6. **Copy the token now**. Meta shows it exactly once.

Store it in a password manager. It is the key to sending messages as your business.

Step 4 — Develop against the test number first

Meta gives you a free test number on the API Setup page. Use it. It sends real WhatsApp messages to up to five recipient numbers you nominate, costs nothing, and needs no verification.

1. On API Setup, under **To**, click **Manage phone number list**
2. Add your own mobile
3. Send the sample "hello_world" template to yourself from that page

If that message arrives, your app is wired up correctly and you can go and build the Make scenario. Come back for Step 5 when you're ready to go live.

Step 5 — Add your real number (do this last)

Only once the scenario works end to end on the test number.

1. API Setup → **Add phone number**
2. Enter your business display name. Meta reviews this — it should match your actual trading name or it gets rejected.
3. Enter the number and verify by SMS or voice call
4. Once it appears in the dropdown, **copy the new Phone Number ID** — it is different from the test number's ID

The scenario reads the Phone Number ID from the incoming webhook automatically, so you don't need to change anything in Make. But note it down.

Messaging limits

New numbers start on a capped tier — a limited number of unique customers you can initiate conversations with per 24 hours. It rises automatically as you send without getting blocked, and once your business is verified. Inbound replies (what this agent does) are not what the cap counts, but stay aware of it if you later add outbound.

Your **quality rating** is visible in the WhatsApp Manager. If it drops to red, Meta throttles you. The fastest way to drop it is people blocking or reporting your number, which is why the opt-out handling in this build is not optional.

Step 6 — Webhook

You do **not** configure this by hand. Make creates the webhook URL and the verify token for you, and Make's WhatsApp connection registers it with Meta.

Guide 2 covers it. Don't touch the Webhooks section on the Meta dashboard yet.

What you should have before moving on

- [] Business verification submitted (pending is fine)
- [] Developer app created with WhatsApp added
- [] Permanent System User token, saved somewhere safe

- [] App ID and App Secret saved
- [] Test message received on your own mobile from the test number