Managing Tickets Using WhatsApp

Ticket Management using Third Parties · https://fluentsupport.com/docs/whatsapp-integration-via-twilio/

Fluent Support allows you to manage your tickets using **WhatsApp**. You can see your New Tickets notification in your **WhatsApp** account and reply to your ticket from this. This article will guide you in setting up **WhatsApp** integration with **FluentSupport**.

Fluent Support Twilio Settings

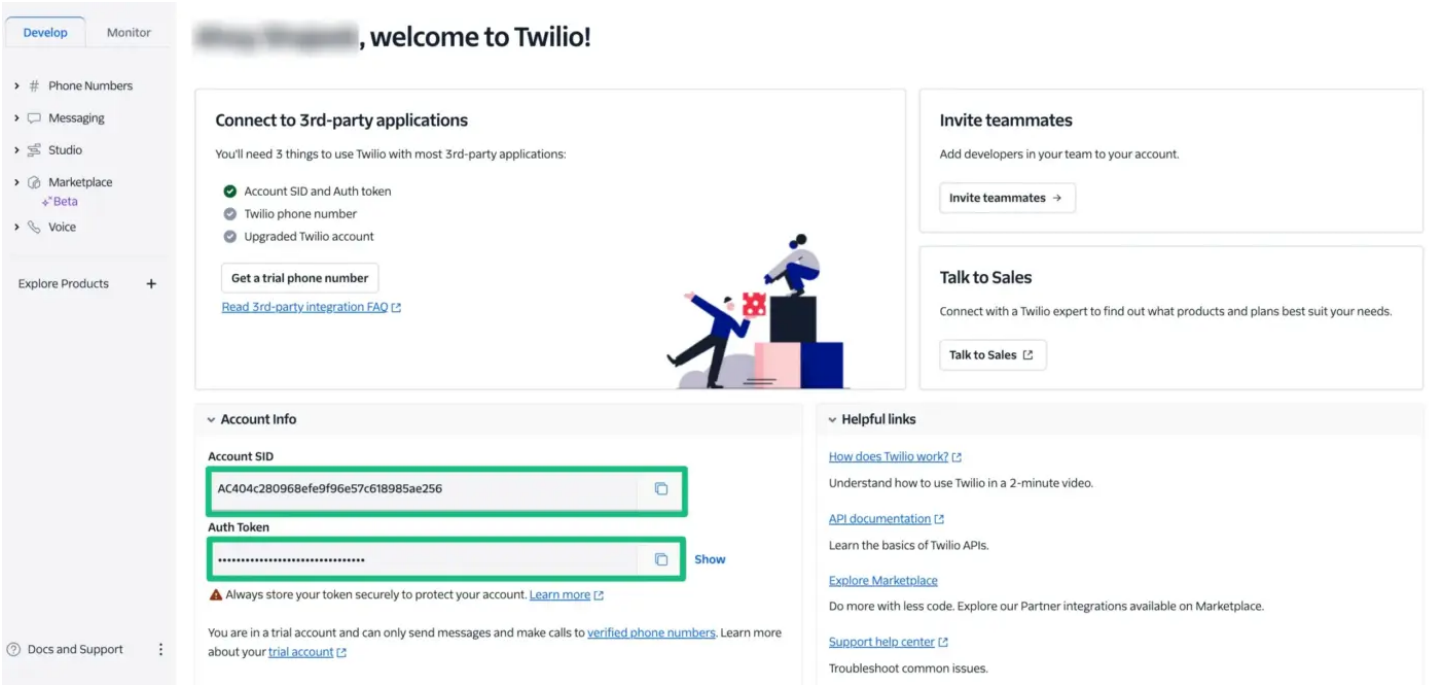
To learn how to manage your Tickets using Twilio (WhatsApp), follow the steps with the screenshots below –

Sign Up On Twilio

First, you'll need a **Twilio** account to get started, go to their **website** and **sign up for a free account.**
You will also need an **Email Address** and a **verified mobile number** to start with their free trial. So make sure to use a number you have access to.

Get The Account SID And Auth Token From Twilio

Once you finish the signup and all Twilio Console configurations, you will get the **Account SID** and **Auth Token** for the **Twilio account** from the **Console page**. Now, copy this to use it later.

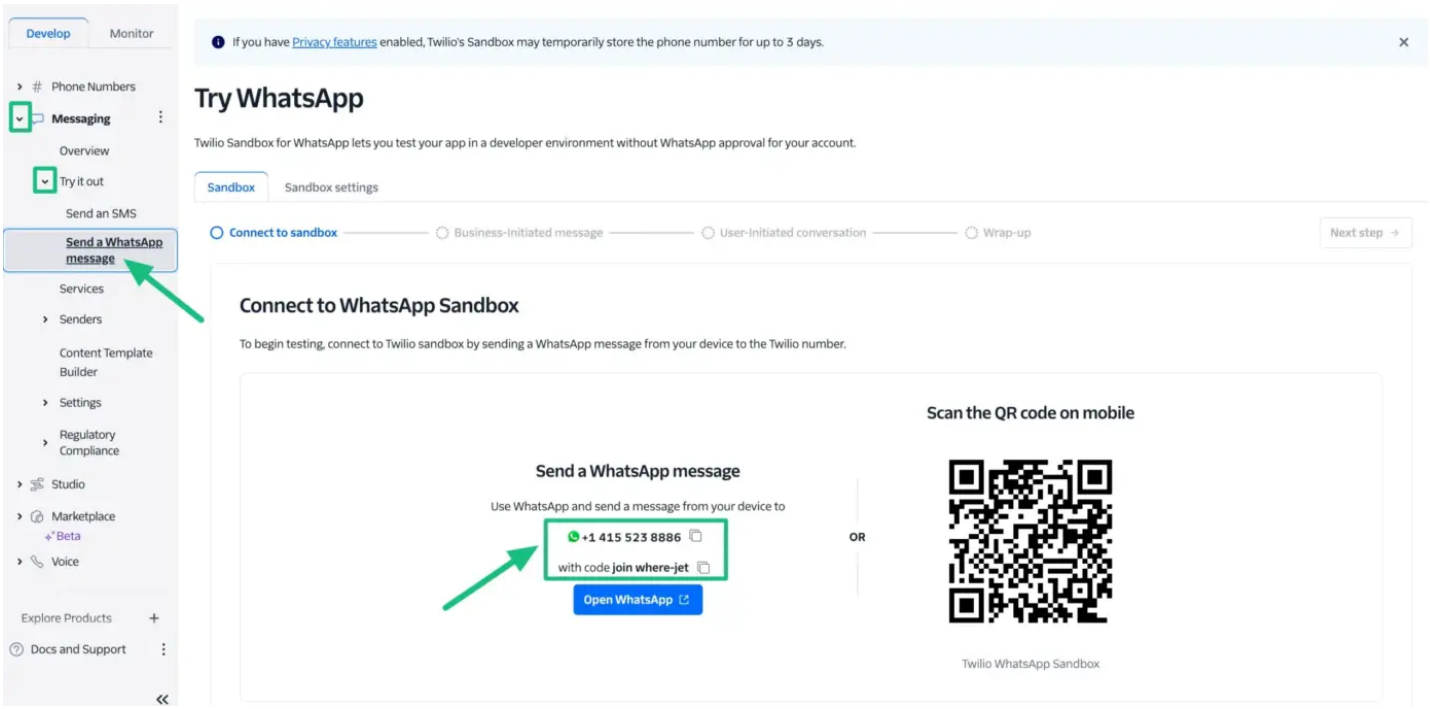


Get The WhatsApp Number from Twilio

Once you're done copying the Twilio Console information, it's time to get the **WhatsApp number**.

Go to **Messaging** in the left-hand sidebar from the Console, expand the **Try it out** dropdown, and Select **Send a WhatsApp Message.**

After enabling the Sandbox, Twilio provides a **WhatsApp Number** and a **Code**.

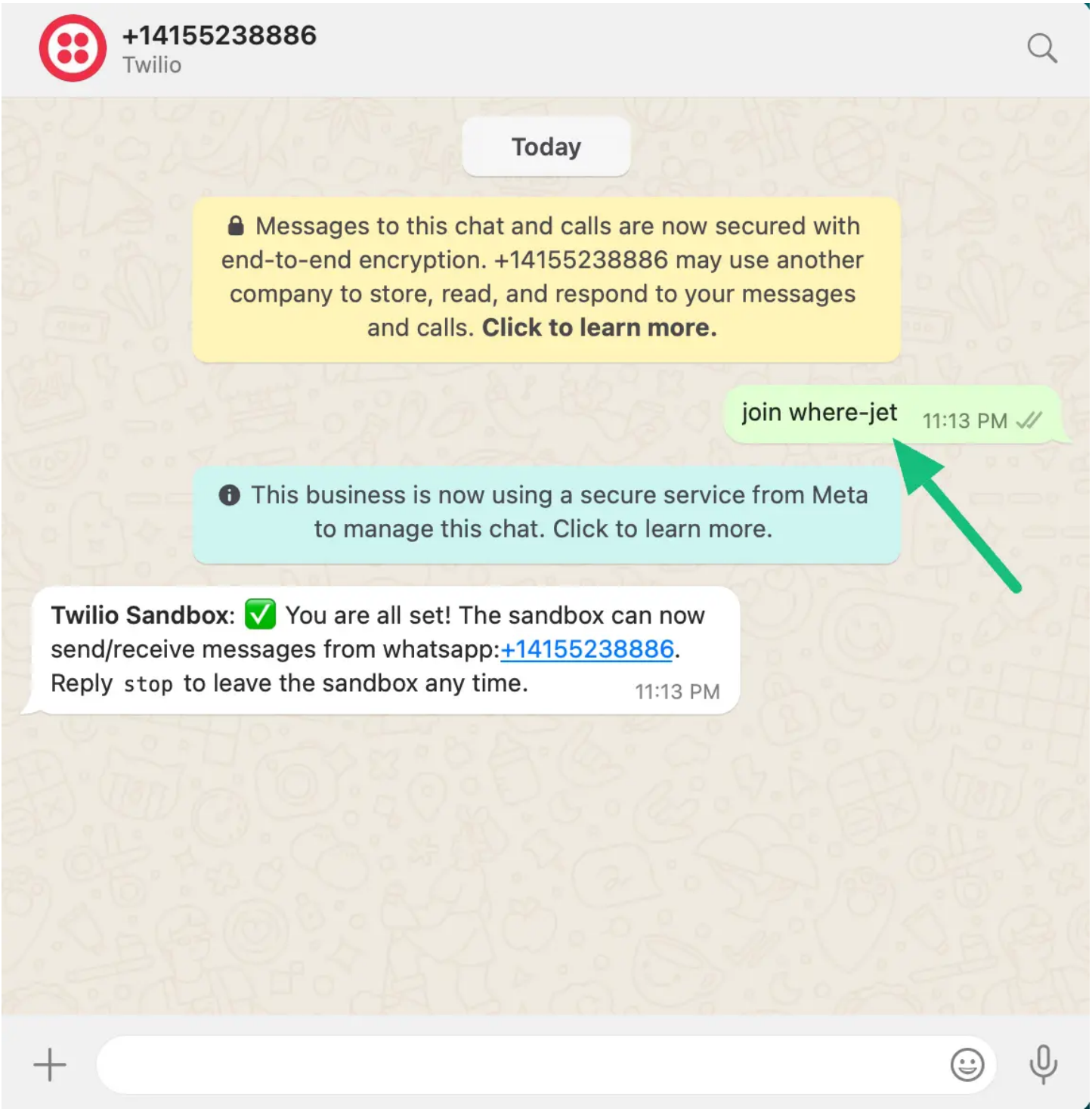


But, before using this number, you have to set up the **WhatsApp Sandbox**. To **learn how to set up** WhatsApp Sandbox, follow the steps with screenshots below -

Setup WhatsApp Sandbox

Now, **create** a **WhatsApp contact with this number** and **send** the provided **code** from your desired **WhatsApp Account**.

This will **return a notification** to your **Twilio WhatsApp chat**.

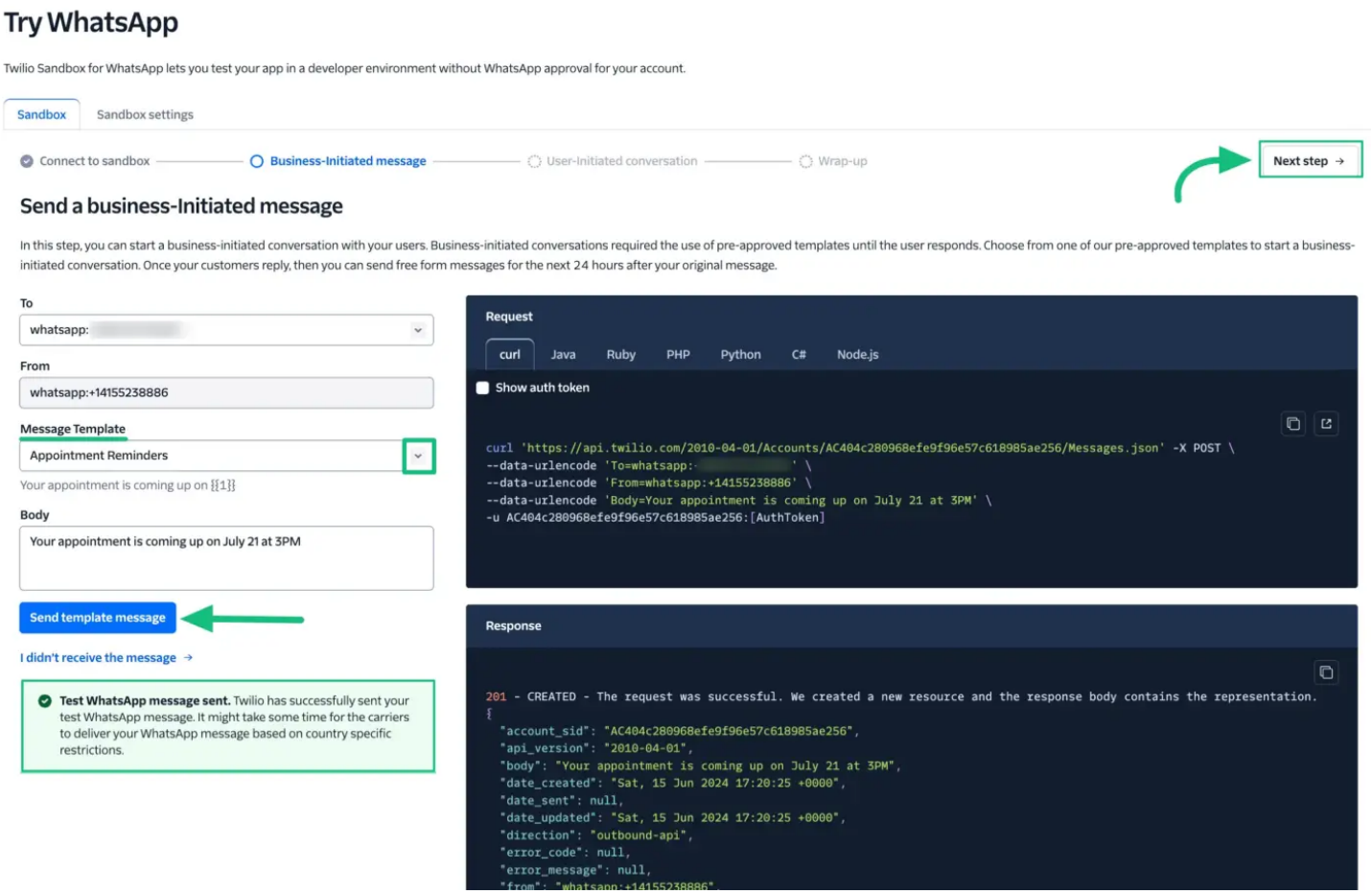


Also, a **message received notification** will **appear** in the **Sandbox**.

To begin a business-initiated chat, **select** one of our **pre-approved templates** from the **Message Template** dropdown list just by clicking the **Arrow Icon**, and after selection click the **Send template message** button.

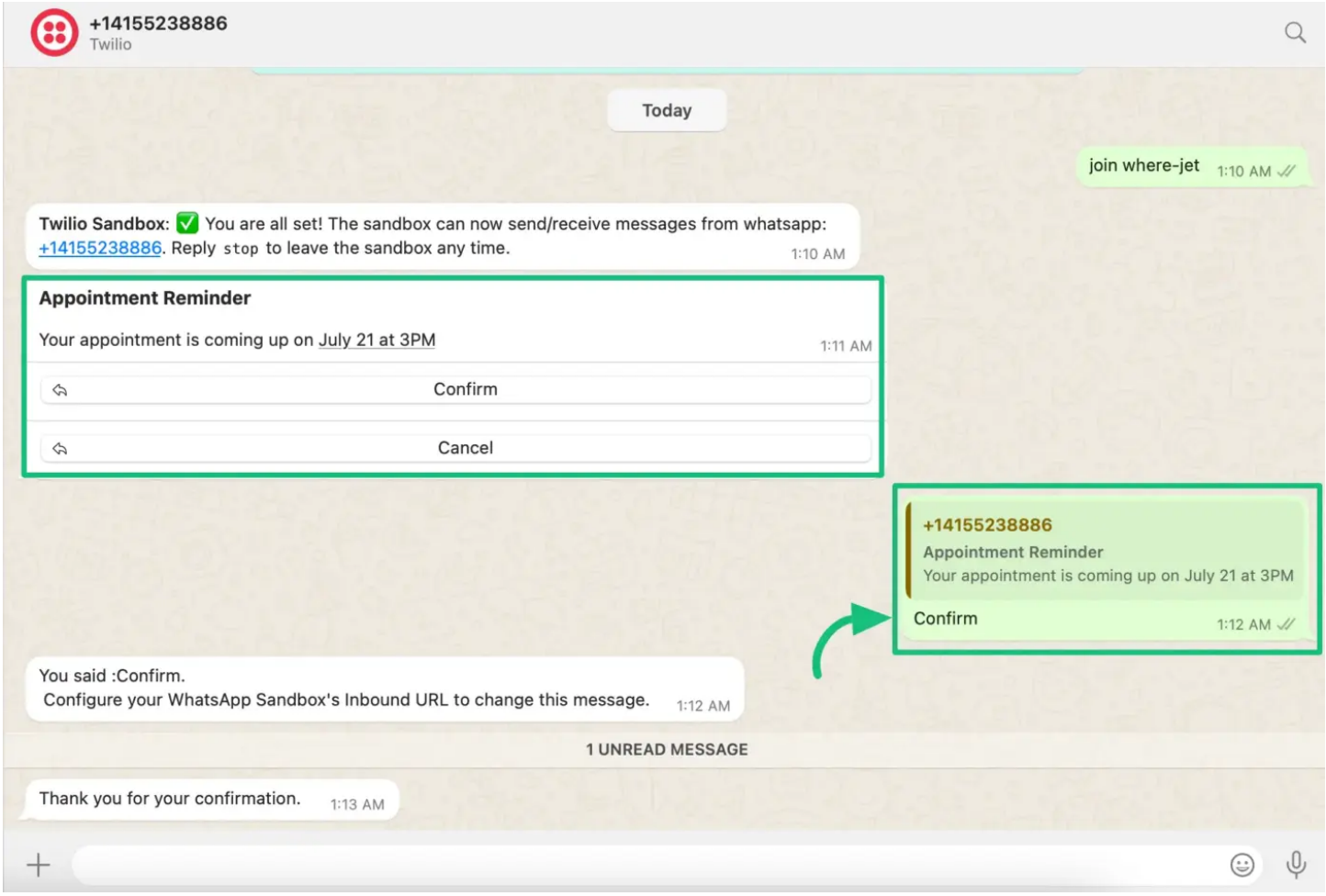
You can engage your users in business-related dialogue at this phase. The use of pre-approved templates was needed for business-initiated interactions up to the user's response.

Now, click the **Next step** and go to the **User-initiated conversation** page.



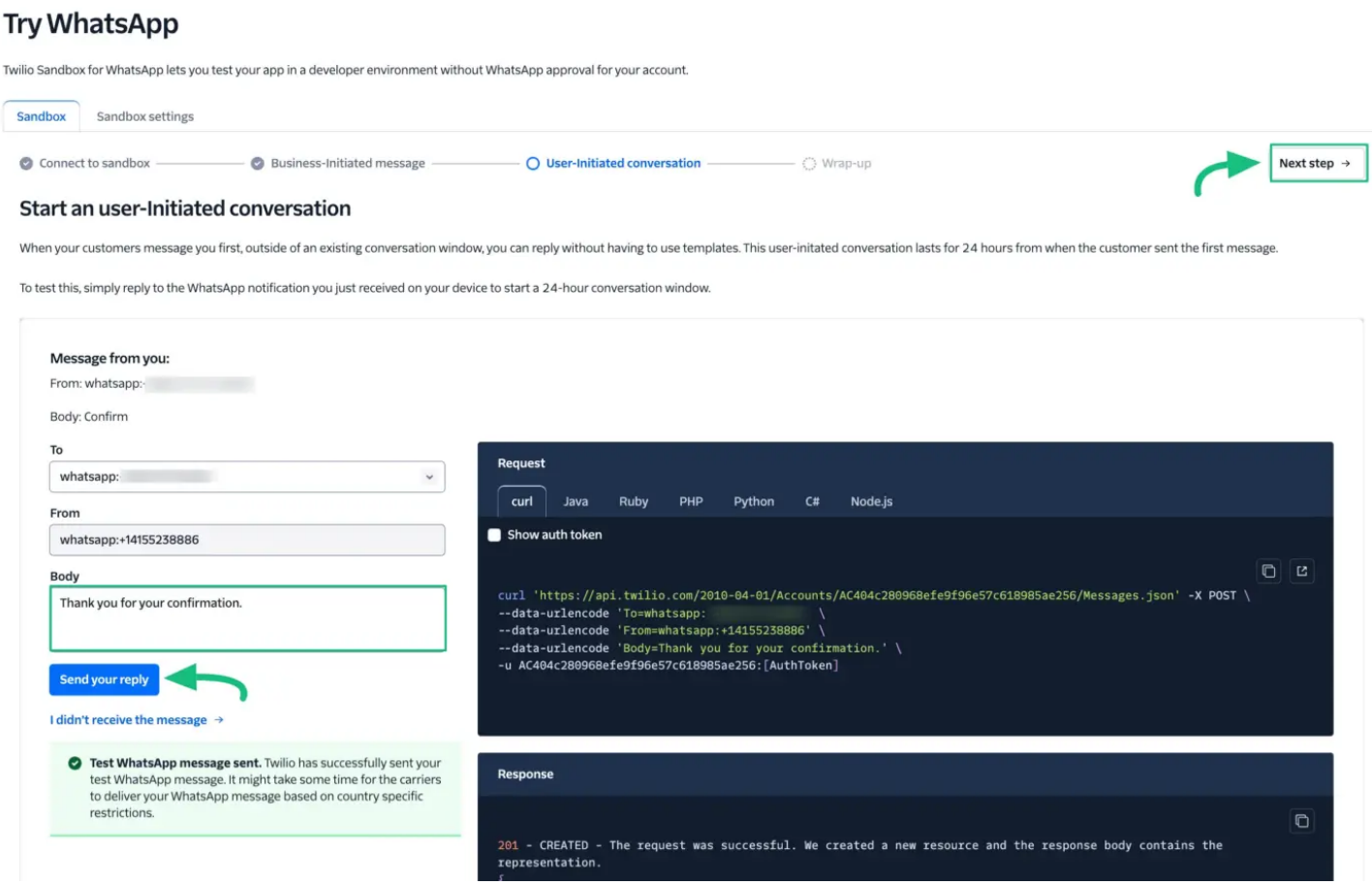
And, this will show as another **Message notification** in the **Sandbox**.

But to get the message notification, you should **reply** to the **previously sent template message** from your **WhatsApp account**.

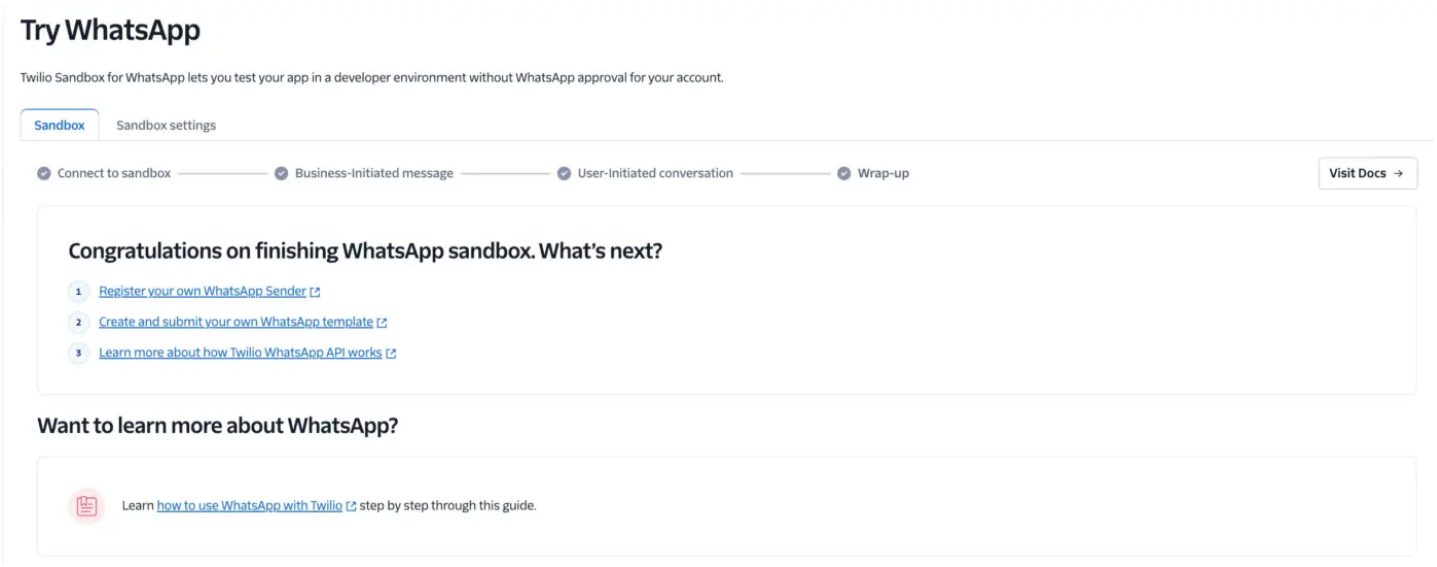


From here, you can also **send messages** to **Twilio WhatsApp chat**.

Now, again click the **Next step** and go to the **Wrap-up** page.



On this page, you will see that configuring your **WhatsApp Sandbox** is done**.**

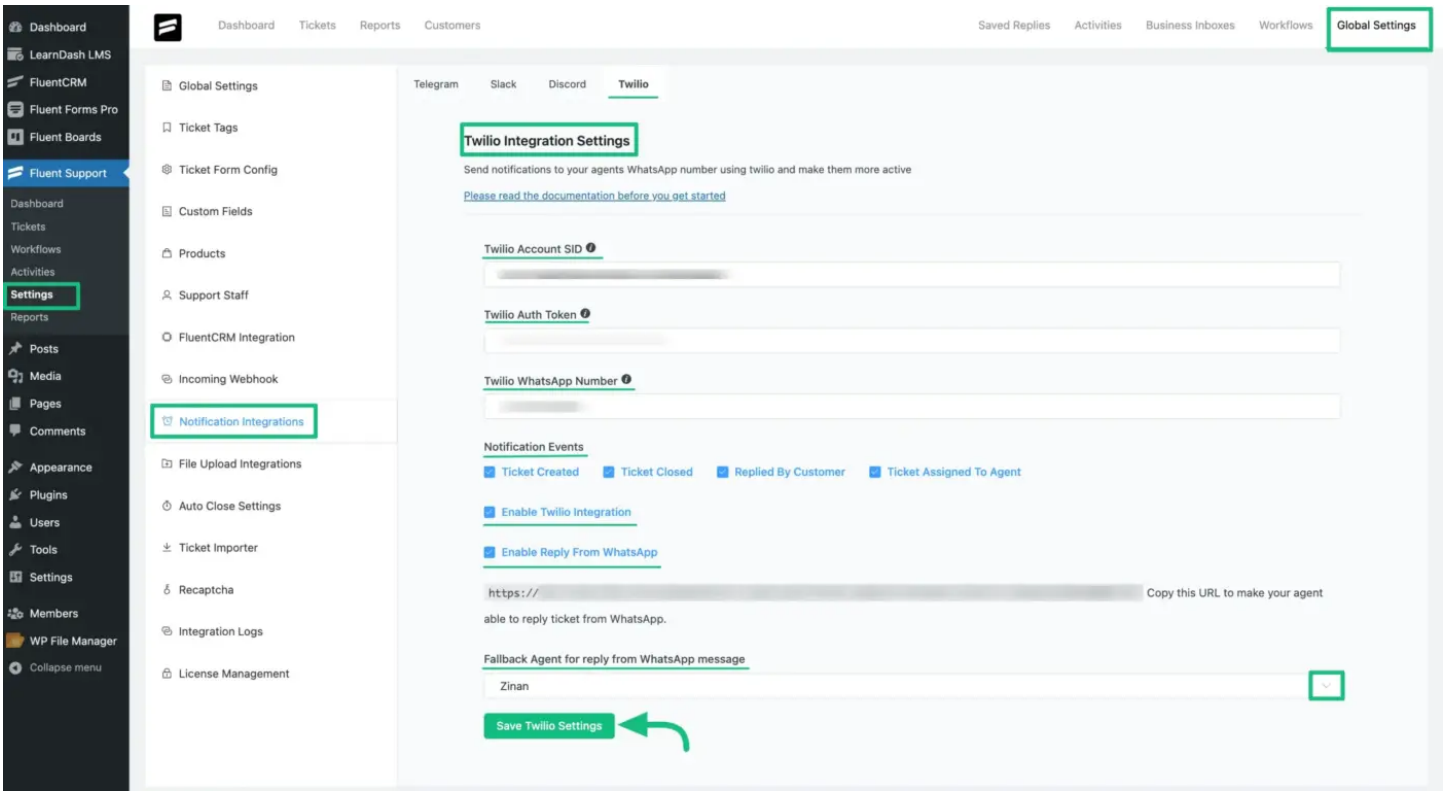


Configure Whatsapp (Twilio) in Fluent Support

Go to **Settings** or **Global Settings** from the **Fluent Support Dashboard** and select **Notification Integrations** from the left sidebar to find the **Twilio** option. Open the **Twilio Integration Settings** page**.**

Now fill in all the fields with the necessary information (**Account SID**, **Auth Token**, and **WhatsApp Number**) that you have copied before. You can **enable the checkboxes** if needed.

Once you are done, do not forget to click the **Save Twilio Settings** button.



A brief explanation of other options mentioned above –

- **Notification Events:** Using this option, choose for which instances you want to be notified through Twilio. The available notification events are – **Ticket Created**, **Ticket Closed**, **Replied by Customer**, and **Ticket Assigned To Agent**.
- **Enable Twilio Integration:** Enable this option, to get the two other options for enabling replies from WhatsApp through agents.

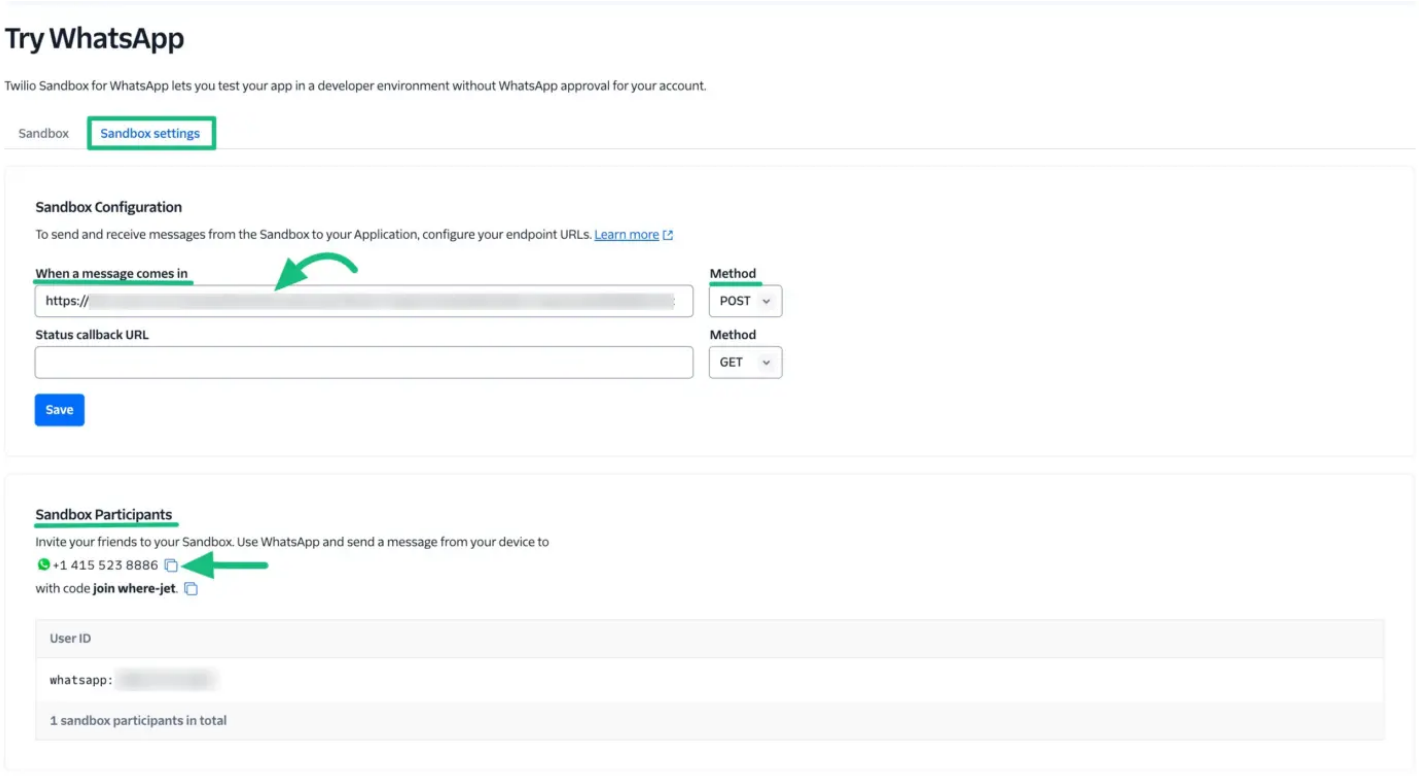
- **Enable Reply From WhatsApp (Agent can directly reply from Telegram):** You can also enable this option so that your support agents can directly reply from WhatsApp. To **enable this** you need to **copy the provided URL** and paste it to **When a message comes in** field under the **Sandbox Settings** tab in Twilio.
- **Fallback Agent for reply from WhatsApp message:** Using this option, you can select a specific fallback agent from the dropdown list for replies from WhatsApp messages.

Reply Tickets From WhatsApp

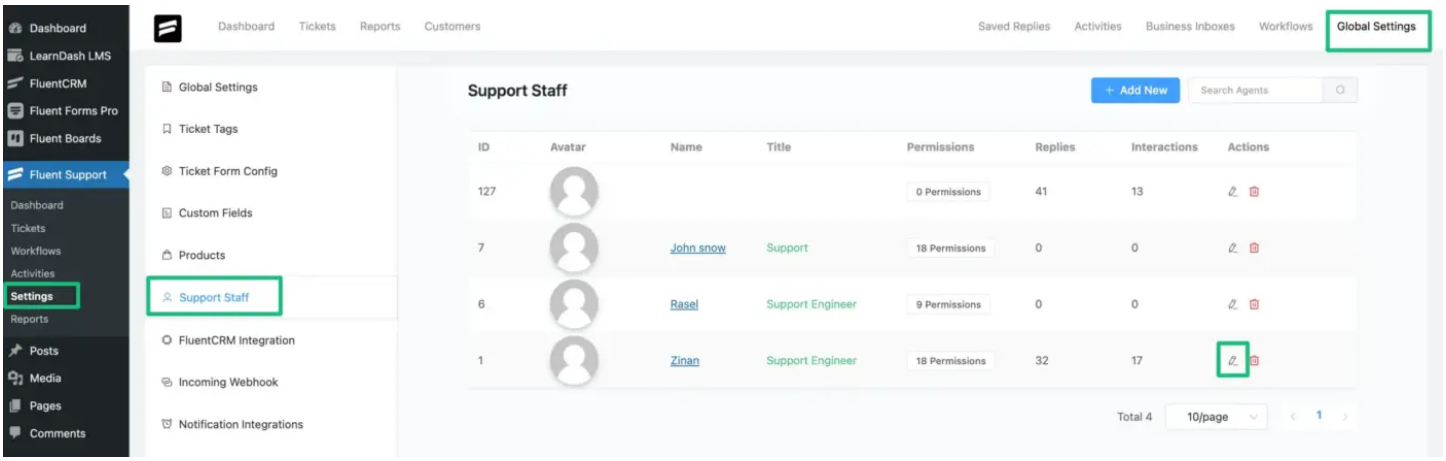
To reply to any tickets direcly from WhatsApp, follow the steps with screenshots below –

Go to the **Sandbox Settings** tab from this page and **paste the URL** that you have copied before from the **Twilio Integration Settings** page inside the **WHEN A MESSAGE COMES IN** field.

Then, copy the **WhatsApp Number** from the **Sandbox Participants.**

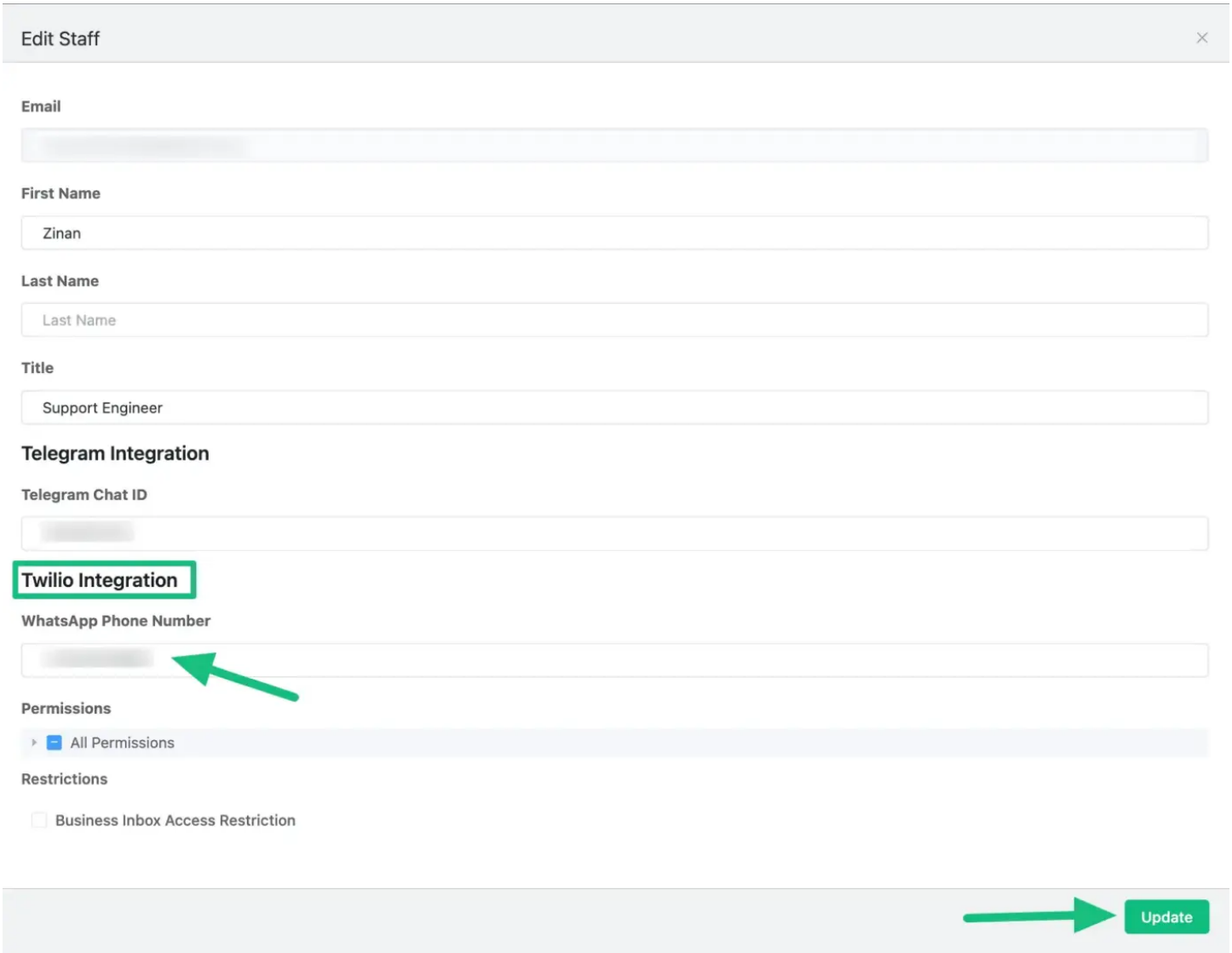


Now, again go back to **Settings** from **Fluent Support Dashboard** and open the **Support Staff** settings option from the left sidebar. Click the **Pencil Icon** of your **desired agent** you want to give access to reply.



Scroll down to **Twilio Integration** and paste the **WhatsApp Number** you copied before. Then, hit the **Update** button.

Make sure to include the **Country Code** when adding this number. Now you can receive ticket notifications on the Twilio chat in WhatsApp and submit responses by replying to the ticket notifications.



Note: To reply to any specific tickets directly from WhatsApp chat, you'll have to type in ##Ticket number## before the message. For example, to reply to ticket no. 33 you have to type ##33## and then type your response.

If you have any further questions, concerns, or suggestions, please do not hesitate to contact our **@support team**. Thank you.