

Movius WhatsApp Onboarding with Meta

Last Modified on 09/21/2026 9:02 am EDT

WhatsApp META Solution Onboarding Guide

WABA setup, billing, number registration, approvals, OBA and attachment controls

Audience Customer Meta/Facebook administrators, customer MMP administrators.

Important This consolidates the current onboarding flow and operational controls. The interface illustrations are representative screen guides, not pixel-perfect product captures. Validate labels against the target environment before execution.

1. Purpose and scope

This document provides an end-to-end, role-based process for onboarding an enterprise customer to the Movius direct Meta WhatsApp solution. It covers the initial tenant enablement through production readiness, including account creation or linking, billing, business profiles, phone-number registration, display-name and Official Business Account tracking, templates, attachments, policy controls, reporting and handover.

2. End-to-end onboarding at a glance

Phase	Primary owner	Key output	Exit gate
1. Feature Activation	Movius	Tenant capability and organisation flags enabled	Meta WhatsApp section visible in MMP
2. WABA onboarding	Customer Meta admin	WABA created or linked through Embedded Signup	WABA visible and Active
3. Billing and profile	Customer finance + MMP admin	Payment method and default business profile	Billing active; profile saved
4. Templates and numbers	Movius Delivery	Approved templates; numbers Connected and Registered	Messaging test succeeds
5. Approvals and activation	Movius + Customer admin	Display-name/OBA status tracked; users enabled	Production readiness accepted
6. Attachments and compliance	Customer admin + Movius	Allowed file types, DLP and archive path tested	Evidence captured and signed off

3. Roles and responsibilities

- Customer Meta/Facebook Administrator: owns the verified Business Portfolio, completes Embedded Signup, creates or links WABAs and maintains customer-owned assets.
- Customer Finance Administrator: provides a valid payment method and the required finance privilege.
- Customer MMP Administrator: configures business profile information, organisation enablement, users and attachment policies.
- Movius Delivery: enables platform capability, configures and publishes WhatsApp templates and supports readiness validation.
- Movius SRE/Operations: performs controlled bulk number registration where required and supports operational monitoring.
- Meta: controls account eligibility, display-name review, OBA approval, badge decisions and platform limits.

4. Prerequisites

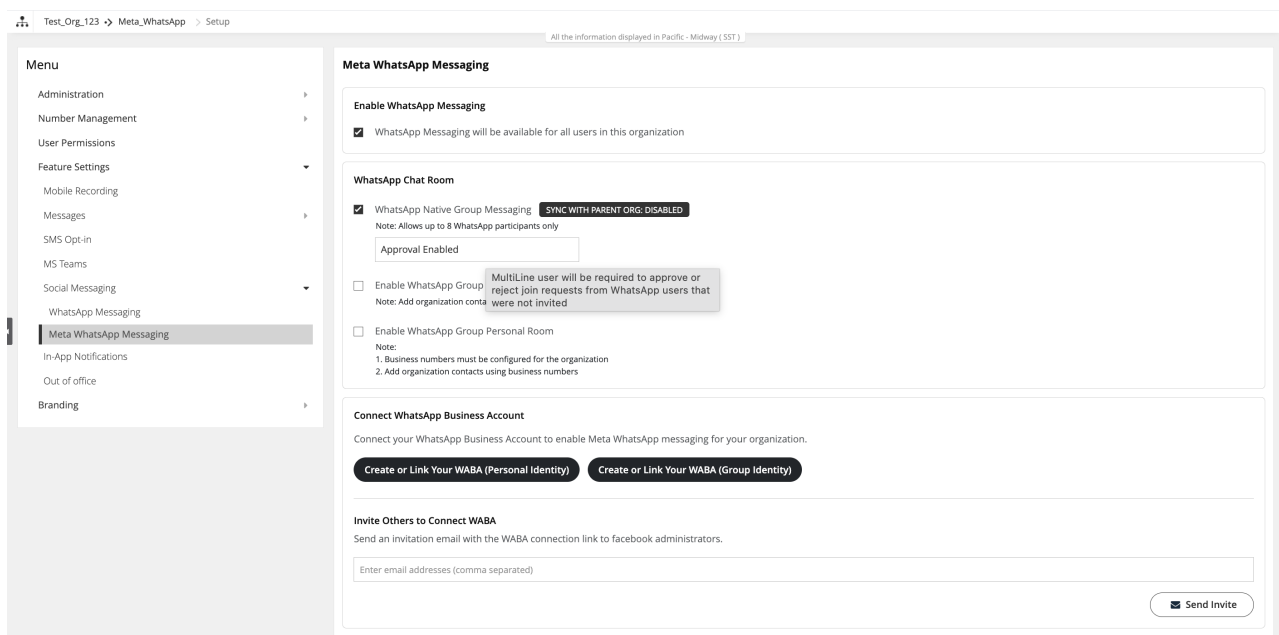
- Verified Meta Business Portfolio and a Meta administrator who can manage it.
- MMP administrator access for the organisation where onboarding will run, or an invite path for a separate Meta administrator.

- Facebook/Meta domains and browser-side SDK access permitted by the customer network.
- Finance privilege and a valid payment method for each WABA.
- Approved legal business details: name, address, website, support email, vertical, description and logo.
- Final list of numbers, region/site and target organisation mapping. Numbers must support OTP receipt and must not already be registered in another WhatsApp environment.
- Agreed display-name format and owners for rejected/pending-name escalation.
- Required message templates, languages and categories defined.
- Attachment types, DLP behaviour, archive destination and Fetch Media API authentication agreed.

5. Enable the customer tenant and expose onboarding

1. Movius enables the Meta WhatsApp capability for the customer tenant.
2. In Service Portal, open the target organisation and add or edit Allow WhatsApp Messaging.
3. Enable Allow Meta Integration and save. For shared-identity onboarding, enable the relevant shared/group controls only after the target design is confirmed.
4. In MMP, navigate to Settings > Feature Settings > Social Messaging > Meta WhatsApp Messaging.
5. Verify that Create or Link WABA and the invitation option are visible.

Control point Run Embedded Signup from the organisation that will own the integration. Confirm the correct parent/sub-organisation mapping before creating assets.

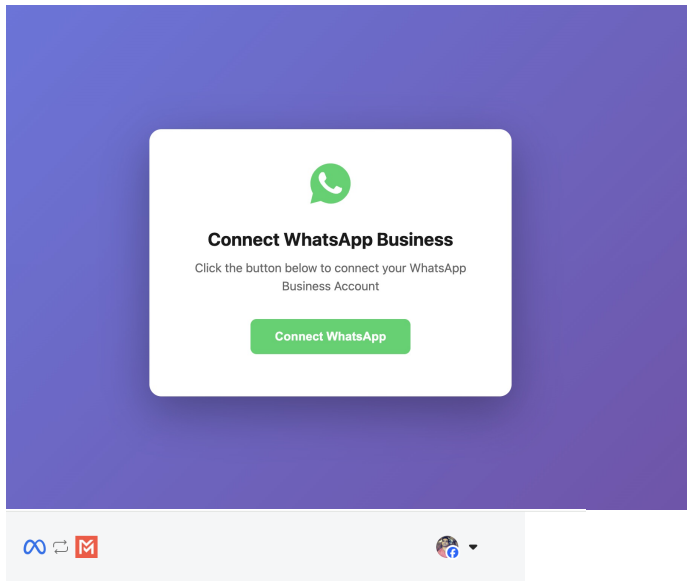


The screenshot displays the 'Meta WhatsApp Messaging' configuration page. On the left is a navigation menu with options like Administration, User Permissions, Feature Settings, and Social Messaging. The main content area is titled 'Meta WhatsApp Messaging' and includes several sections:

- Enable WhatsApp Messaging:** A checkbox is checked, indicating that WhatsApp Messaging will be available for all users in this organization.
- WhatsApp Chat Room:**
 - ☒ WhatsApp Native Group Messaging: A note states 'Note: Allows up to 8 WhatsApp participants only'. A button next to it says 'SYNC WITH PARENT ORG-DISABLED'.
 - ☐ Enable WhatsApp Group: A note states 'Note: Add organization contacts'. A tooltip indicates 'MultiLine user will be required to approve or reject join requests from WhatsApp users that were not invited'.
 - ☐ Enable WhatsApp Group Personal Room: A note states 'Note: 1. Business numbers must be configured for the organization 2. Add organization contacts using business numbers'.
- Connect WhatsApp Business Account:** A section with the instruction 'Connect your WhatsApp Business Account to enable Meta WhatsApp messaging for your organization.' and two buttons: 'Create or Link Your WABA (Personal Identity)' and 'Create or Link Your WABA (Group Identity)'.
- Invite Others to Connect WABA:** A section with the instruction 'Send an invitation email with the WABA connection link to facebook administrators.' and a text input field for email addresses, followed by a 'Send Invite' button.

6. Create or link a WABA through Meta Embedded Signup

6. Select Create or Link your Business Portfolio WABA.
7. Select Connect WhatsApp and authenticate with the customer Meta administrator account.

**Continue as Divyankur Srivastava?**

Movius Secure Messaging will receive your name and profile picture. This doesn't let Movius Secure Messaging post to Facebook without your permission.

You need to log in with an existing Facebook account. New accounts won't be approved for Business Manager. No one can see a personal Facebook profile unless you confirm their friend request. [Learn more](#)

[Cancel](#)[Continue as Divyankur Sriv...](#)

Not Divyankur Srivastava? [Log into another account.](#)

By continuing, Movius Secure Messaging will receive ongoing access to the information you share and Meta will record when Movius Secure Messaging accesses it. [Learn more about this sharing and the settings you have.](#)

Movius Secure Messaging's [Privacy Policy](#)

[Help Center](#)

8. Review and accept the permissions needed to manage WhatsApp assets.
9. Select the customer verified Business Portfolio.
10. Choose an eligible existing WABA or create a new WABA. For shared identity, create and use a dedicated WABA.
11. Enter the WABA name and time zone, review the information and confirm.



✓

○

Create or select your WhatsApp Business account
This WhatsApp Business account will belong to your business portfolio

Choose a WhatsApp Business account

Create a WhatsApp Business account ▼

WhatsApp Business account name

Movius 6/255

Time zone ⓘ

(GMT+05:30) Asia/Kolkata ▼

Movius Secure Messaging's [Privacy Policy](#)
Session ID: 01a0c361-ea05-79e8-96ce-7dc7a4a6916b

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Next

12. Complete any verification presented by Meta and return to MMP.



Review Movius Secure Messaging's access request
This is what Movius Secure Messaging will do with the things you selected in previous steps.

Manage your business
Movius

Manage your WhatsApp accounts
1 WhatsApp Account selected

Manage and access conversations in WhatsApp
1 WhatsApp Account selected

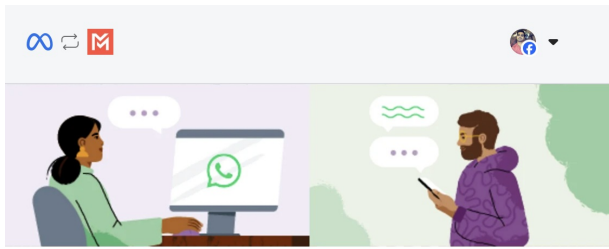
Log events on your WhatsApp business account's behalf and send those events to Meta
1 WhatsApp Account selected

Movius Secure Messaging's [Privacy Policy](#)

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Confirm

- ### Add or update the payment method



You're now ready to chat with people on WhatsApp

We'll review your business to ensure it complies with the [WhatsApp Business Messaging Policy](#) and reach out within 24 hours if there's an issue.

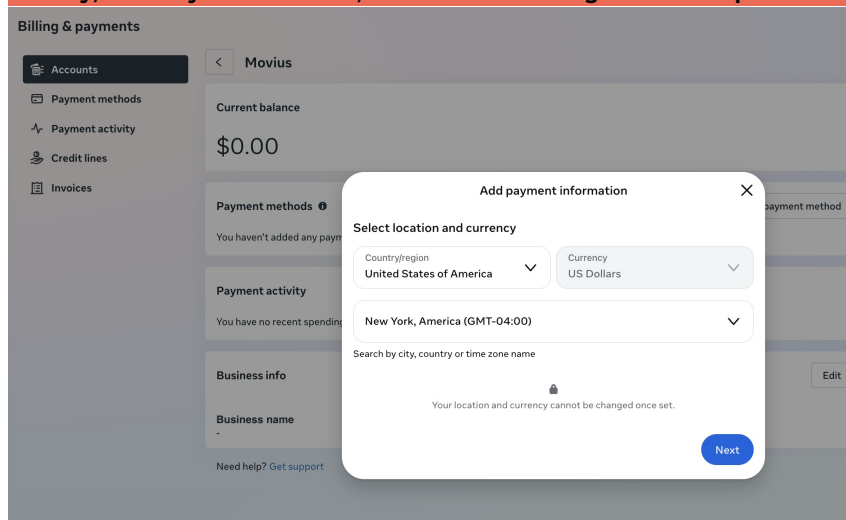
You can now have

-  **At least 2,000 business-initiated conversations**
In a rolling 24-hour period, after completing display name review
-  **Unlimited customer-initiated conversations**

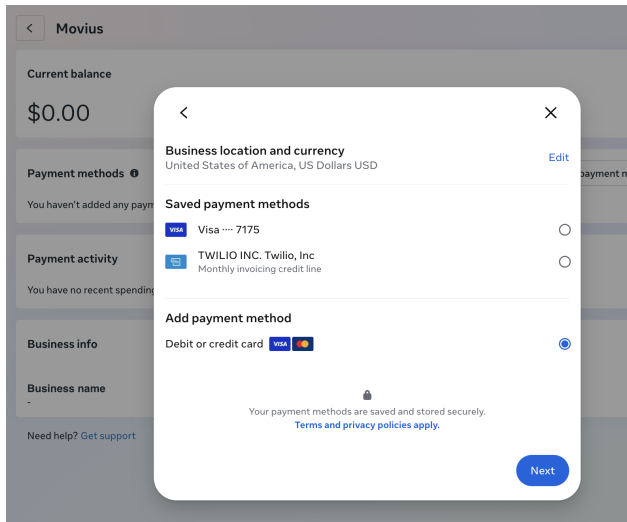
[Movius Secure Messaging's Privacy Policy](#)



- Open Meta Business Settings or Billing and Payments for the newly created WABA. **Ensure you select, right country, currency and timezone, this cannot be changed at a later point of time.**



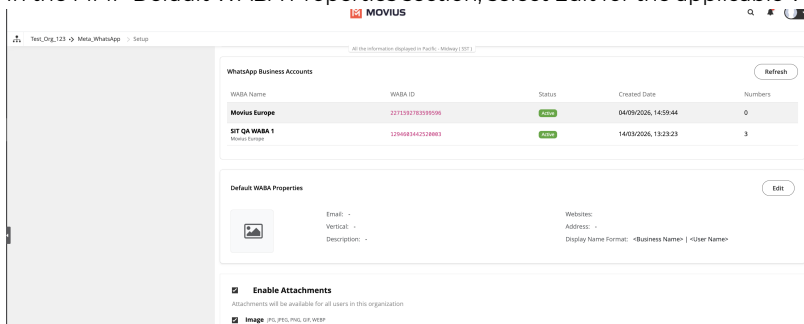
- Select Payment Settings. The administrator completing this step must have the required finance privilege.
- Complete the billing business information. Ensure country/region, currency and time zone match the payment method and invoicing requirements.
- Choose an existing Business payment method or add a new card.



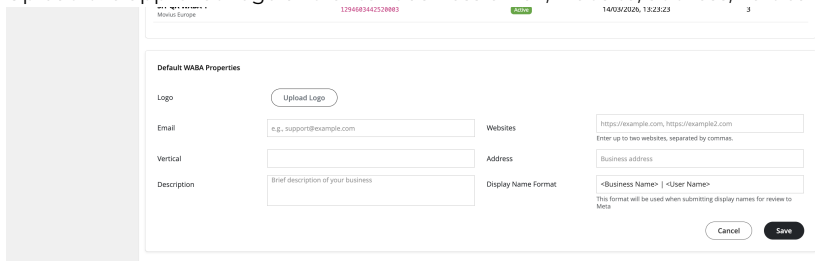
18. Save the payment method and confirm that it is attached to the correct WABA.

7. Configure the default business profile

20. In the MMP Default WABA Properties section, select Edit for the applicable WABA.



21. Upload the approved logo and enter business email, website, address, vertical and description.



22. Select the agreed display-name format. Use a custom name only when the customer naming authority has approved it.

- a. Display names have to go through an automated approval process, META rejects the display names if names do not follow their guidelines. MMP admins can select one of the format for display names from MMP portal for users in their organization.
 - <meta-business-name> | <MMP-user-name> will display Movius Bank | Jon Stuart
 - <meta-business-name> <Country-code of ph no.> | <MMP-user-name> will display Movius Bank US | Jon Stuart
 - <meta-business-name> <Country-code of ph no.> will display Movius US

MMP admins can also add custom username for users from MMP portal.

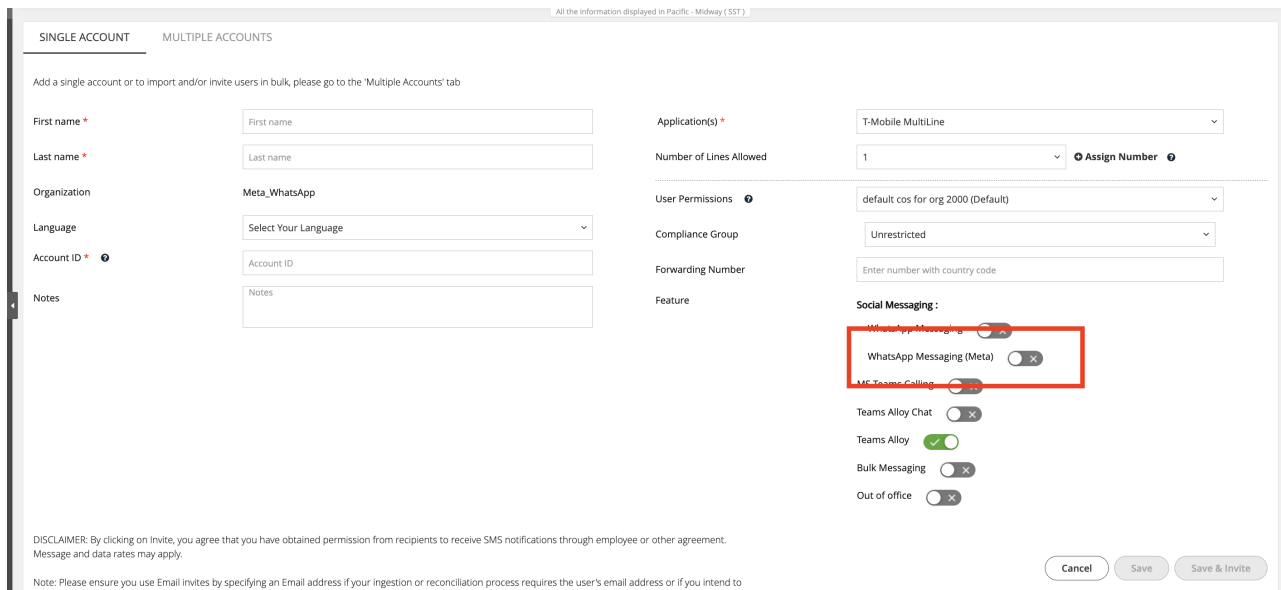
[Important] - Updating the email field will display same email on WhatsApp business profile of all numbers. Leaving the email empty will update their company email on business profile.

23. Save. Verify that the profile has synchronised to newly registered numbers by looking up numbers in WhatsApp application.
24. It can take upto 24 hours for numbers to be registered and 2 to 4 weeks for display name and OBA status to be granted.

8. Register phone numbers

25. Validate the source list: number, region, organisation, WABA, user/account and identity type.
26. Confirm that each number can receive the Meta verification OTP and is not registered in a consumer or WhatsApp Business app.
27. Navigate to account of existing users or create a new account and turn on 'WhatsApp Messaging (META)' toggle. Enabling WhatsApp will start the number registration process with META and upon number registration, users can start communicating with their customers.
 - **Unprovisioned** - Toggle is on, Meta has not finished (or even started) registering the number
 - **Pending Verification** - OTP verification in progress
 - **Registered** - Number has been added to WABA but is not active.
 - **Verification Failed** - OTP verification has failed.
 - **Connected** - Number is activated with META, messages can be sent and received by numbers.

Please note that OTP verification is an automated process that runs in background after "WhatsApp Messaging(META)" toggle is enabled for user. Users might receive an OTP on their Movius number that they can ignore.



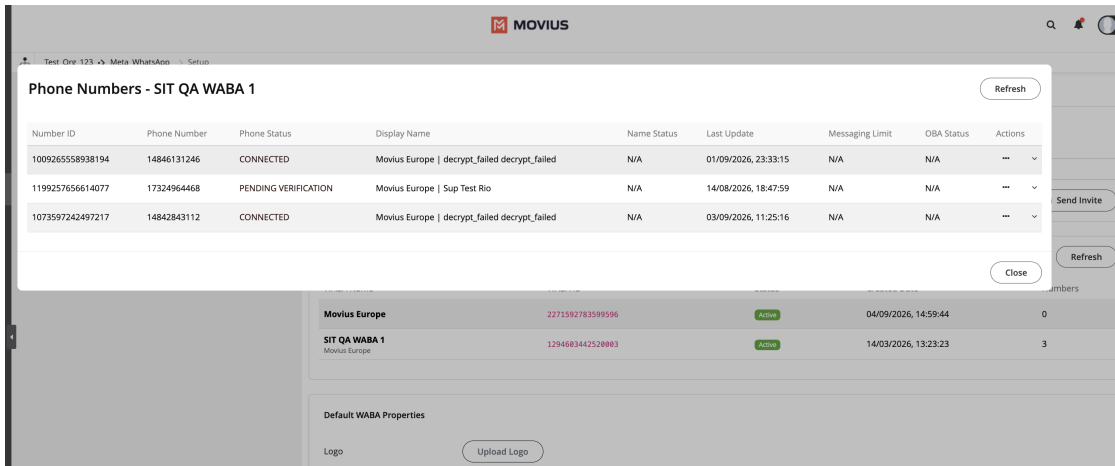
The screenshot shows the 'SINGLE ACCOUNT' setup page. On the left, there are input fields for 'First name', 'Last name', 'Organization' (set to 'Meta_WhatsApp'), 'Language' (set to 'Select Your Language'), 'Account ID', and 'Notes'. On the right, there are settings for 'Application(s)' (set to 'T-Mobile MultiLine'), 'Number of Lines Allowed' (set to '1'), 'User Permissions' (set to 'default cos for org 2000 (Default)'), 'Compliance Group' (set to 'Unrestricted'), and 'Forwarding Number'. Below these is the 'Social Messaging' section, which contains several toggle switches. The 'WhatsApp Messaging (Meta)' toggle is highlighted with a red box and is currently turned on. Other toggles include 'WhatsApp Messaging', 'MC Teams Calling', 'Teams Alloy Chat', 'Teams Alloy' (checked), 'Bulk Messaging', and 'Out of office'.

DISCLAIMER: By clicking on Invite, you agree that you have obtained permission from recipients to receive SMS notifications through employee or other agreement. Message and data rates may apply.

Note: Please ensure you use Email invites by specifying an Email address if your ingestion or reconciliation process requires the user's email address or if you intend to

Buttons: Cancel, Save, Save & Invite

28. After registration, complete an inbound and outbound messaging test and capture evidence.
29. Check the status in WABA Phone Number Reports



Number ID	Phone Number	Phone Status	Display Name	Name Status	Last Update	Messaging Limit	OBA Status	Actions
100926558938194	14846131246	CONNECTED	Movius Europe decrypt_failed decrypt_failed	N/A	01/09/2026, 23:33:15	N/A	N/A	--
1199257656614077	17324964468	PENDING VERIFICATION	Movius Europe Sup Test Rio	N/A	14/08/2026, 18:47:59	N/A	N/A	--
1073597242497217	14842843112	CONNECTED	Movius Europe decrypt_failed decrypt_failed	N/A	03/09/2026, 11:25:16	N/A	N/A	--

9. Display-name tracking and updates

Observed state	Required action	Description
Pending Review	Monitor in MMP and Meta. Escalate if outside the agreed operational threshold.	Display name is being reviewed by Meta
Approved(n/a)	No action required	Display name is approved by META
Rejected	Customers or Movius can appeal against the rejection or change the name and resubmit.	Display name has been rejected by META.

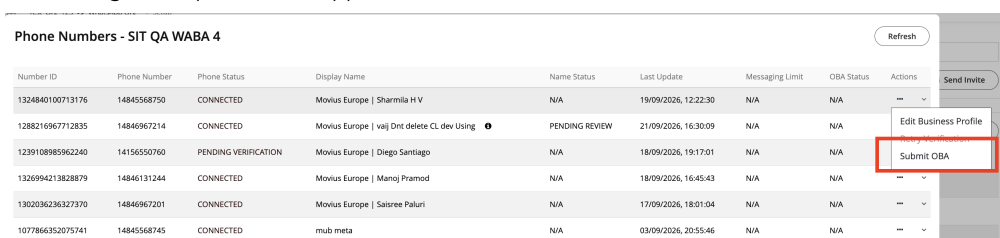
Change control Do not alter employee or enterprise names solely to improve approval probability.

10. OBA status and verification

The intended sequence is number registration, display-name submission/approval, then the OBA-status request for eligible numbers. If Meta does not expose OBA eligibility, the request cannot be completed and must be investigated with Meta support.

31. Confirm the number is Connected and Registered.
32. Confirm the display name is approved and the business profile is complete.
33. Check whether Meta marks the number/WABA as eligible for Official Business Account review.
34. OBA request is automatically submitted after display name approval
 - a. In the event of rejection, submit the eligible number for OBA consideration through the supported process.
35. Track Not eligible, Submitted/Pending, Approved or Rejected separately from registration and display name.
36. Retain the Meta response and raise a comparison case where similar WABAs show inconsistent eligibility.

Decision boundary Meta exclusively controls OBA eligibility, review, approval and the blue verification badge. Movius can submit eligible requests and support escalation, but cannot override a Meta decision.



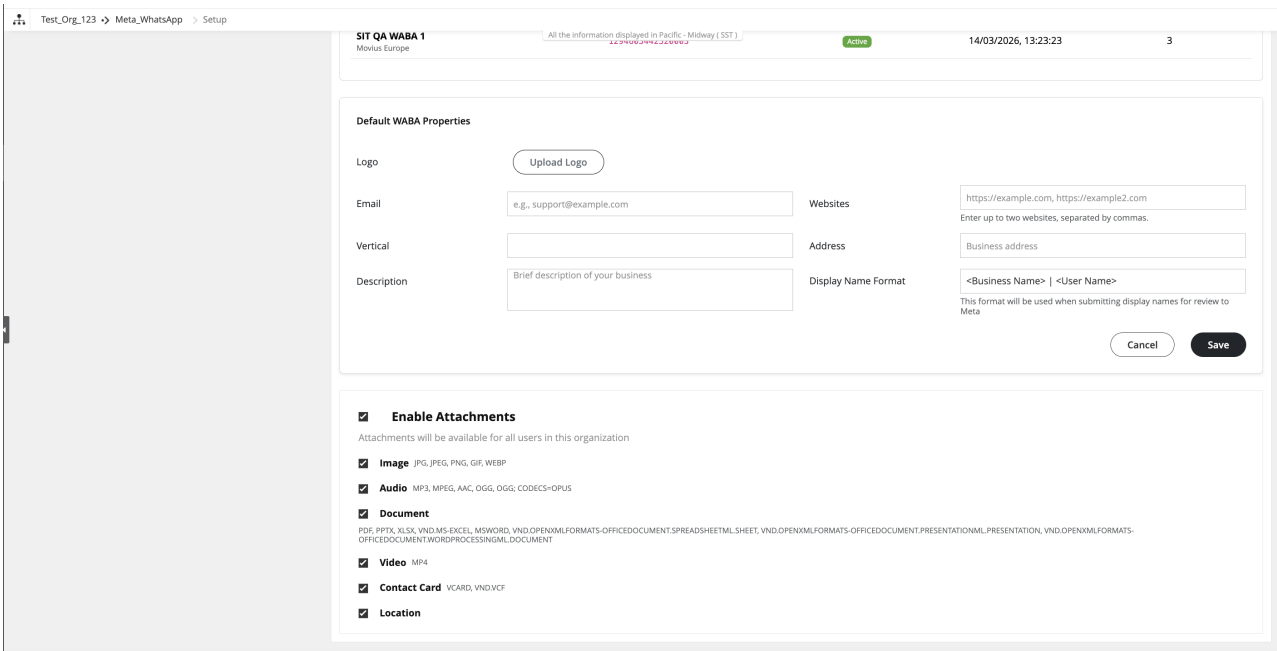
Number ID	Phone Number	Phone Status	Display Name	Name Status	Last Update	Messaging Limit	OBA Status	Actions
1324840100713176	14845568750	CONNECTED	Movius Europe Sharmila H V	N/A	19/09/2026, 12:22:30	N/A	N/A	--
1288216967712835	14846967214	CONNECTED	Movius Europe waj Dnt delete CL dev Using	PENDING REVIEW	21/09/2026, 16:30:09	N/A	N/A	--
1239108985962240	14156550760	PENDING VERIFICATION	Movius Europe Diego Santiago	N/A	18/09/2026, 19:17:01	N/A	N/A	--
1326994213828879	14846131244	CONNECTED	Movius Europe Manoj Pramod	N/A	18/09/2026, 16:45:43	N/A	N/A	--
1302036236327370	14846967201	CONNECTED	Movius Europe Saisree Paluri	N/A	17/09/2026, 18:01:04	N/A	N/A	--
1077866352075741	14845568745	CONNECTED	mub meta	N/A	03/09/2026, 20:55:46	N/A	N/A	--

11. Enable users and validate service

37. After the WABA, payment, required template and number readiness gates are met, enable WhatsApp Messaging (Meta) for the target organisation.
38. Enable individual users from MMP, provisioning API, bulk import or approved bulk operation.
39. For existing Twilio users, follow the migration runbook and communicate conversation impact before cutover.
40. Validate initiation template, inbound reply, free-form messaging within the active window, delivery receipts, archive output and user-visible business identity.
41. Track failures by stage rather than using a single generic onboarding status.

12. Attachments enablement and compliance controls

42. In MMP, enable attachment support for the target WhatsApp organisation/use case.
43. Configure the approved MIME types. Current internal scope references images, documents, audio, video, contacts and static location; validate the authoritative list and size limits for the release being deployed.
44. Pictures, Document, Audio are supported upto 5 MB and Videos are supported upto 10 MB.



Test_Org_123 → Meta_WhatsApp → Setup

SIT QA WABA 1 Movius Europe All the information displayed in Pacific - Midway (SST) Active 14/03/2026, 13:23:23 3

Default WABA Properties

Logo Upload Logo

Email Websites
Enter up to two websites, separated by commas.

Vertical Address

Description Display Name Format
This format will be used when submitting display names for review to Meta.

Cancel Save

☒ **Enable Attachments**
 Attachments will be available for all users in this organization

☒ **Image** JPG, JPEG, PNG, GIF, WEBP

☒ **Audio** MP3, MPEG, AAC, OGG, OGG, CODECS=OPUS

☒ **Document**
 PDF, PPTX, XLSX, VND-MS-EXCEL, MSWORD, VND.OPENXMLFORMATS-OFFICEDOCUMENT, SPREADSHEETML-SHEET, VND.OPENXMLFORMATS-OFFICEDOCUMENT, PRESENTATIONML-PRESENTATION, VND.OPENXMLFORMATS-OFFICEDOCUMENTWORDPROCESSINGML-DOCUMENT

☒ **Video** MP4

☒ **Contact Card** VCARD, VND.VCF

☒ **Location**

13. Operational dashboard and daily tracking

- Customer/organisation and target WABA
- Phone number and user/account
- Registration state and last update
- Display-name value and approval state
- Business-profile synchronisation state
- OBA eligibility and approval state
- Payment/billing readiness
- Template readiness by language/WABA
- Attachment-policy readiness and test evidence
- Exception owner, support case and next action

14. Troubleshooting guide

Symptom	Checks	Next action
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WABA flow does not load in MMP	Browser can reach Meta/Facebook SDK; user permissions; target organisation flags	Facebook domain must be whitelisted by organizations to view the WABA setup in MMP.
Message fails after registration	Payment method, tax/business information, template approval, quality/eligibility	Correct billing or template issue, then retest
Number stuck pending verification	OTP delivery, duplicate registration, WABA mapping, cooldown	Avoid immediate repeated retries; follow cooldown and escalation process
Display name inconsistent	Compare MMP, Meta approval email and WhatsApp client	Separate Meta approval issue from Movius profile sync defect
OBA option unavailable	Business verification, number/display-name readiness, WABA eligibility	Open Meta support case with working vs blocked comparison evidence
Logo/details missing	Stored profile data and synchronisation after number registration	Resave/resynchronise once; raise product defect if repeated
Attachment unavailable	Organisation control, MIME/extension policy, client release, Fetch Media API	Correct policy or integration and repeat end-to-end test

15. Go-live checklist

- ☐ Meta WhatsApp capability enabled for the correct tenant
 - ☐ WABA(s) created or linked and visible in MMP
 - ☐ Payment method and required billing information active on every WABA
 - ☐ Default business profile approved by customer and synchronised
 - ☐ Required templates approved for every WABA/language
 - ☐ Numbers mapped, OTP-verified, Connected and Registered
 - ☐ Display-name exception process active
 - ☐ OBA eligibility/status tracked separately
 - ☐ Attachments, MIME types and DLP controls validated
 - ☐ Archive and Fetch Media API tests passed
 - ☐ Pilot users complete production-like test
-