

A PRACTICAL GUIDE FOR BUSINESS OWNERS

Set up. Get recognised. Start answering.

Your guide to Conversaa, WhatsApp business identity and confident day-to-day use.

Start here: three different approvals

Business verification checks your legal business. Display-name review checks your WhatsApp name. A blue badge has its own approval process. One does not guarantee the others.

Choose a guide

Click a title to jump

01	Create your Conversaa account	2
02	Connect WhatsApp	3
03	Verify your business with Meta	4
04	Choose your verification documents	5
05	India: choose your business type	6
06	India: verification checklist	7
07	Get your WhatsApp name reviewed	8
08	Understand the blue badge	9
09	Connect Instagram and Messenger	10
10	Teach your assistant and set its voice	11
11	Use bookings, offers and creatives	12
12	Go live and solve common issues	13

Use the clickable links inside each guide to open the right page.
Conversaa settings require sign-in; public help does not.

START HERE · 5 STEPS

Create your Conversaa account

Register, confirm your email and set up your business before connecting a channel.

You do not need a blue badge to register. Meta documents are handled separately in Meta's own verification flow.

Have these ready

- An email inbox you can open
- Your business name, website, hours and contact details
- An owner or manager who can approve channel access

1 Register

Open the registration page. Enter your email, create and confirm your password, then continue. Add your business name, category and your own name. Complete the billing details if you choose business billing.

[Create an account ↗](#)

2 Verify your email

Open the verification email and follow its link. Check spam if it is missing. Use the resend option on the verification screen. Channel connection requires a verified email.

[Email verification ↗](#)

3 Follow guided setup

Confirm the business type, choose a channel, add answers and choose your voice. If you skip a step, return to it from Settings or Answers. Healthcare businesses should provide an emergency contact.

[Open guided setup ↗](#)

4 Check business facts

Save your address, hours, prices, policies, currency and timezone. For an India-based business, use Asia/Kolkata. Correct time settings matter for bookings, events and reminders.

[Business settings ↗](#)

5 Invite your team

Invite colleagues using their own email addresses and the appropriate roles. Keep an owner responsible for billing and account access. Do not share your password.

[Manage your team ↗](#)

You are ready when...

Your email is verified, your business details are correct and the right people have access.

Keep in mind. Dashboard links require sign-in. If a link opens the login page, sign in and open the link again. Some screens depend on your role or plan.

CONNECT CHANNELS · 5 STEPS

Connect WhatsApp

Link the correct business number and prove that messages work in both directions.

Have access to your business's Meta portfolio and the WhatsApp number you want customers to use. Meta may ask you to prove control of the number.

Have these ready

- A Facebook login with the required business permissions
- The correct business portfolio and WhatsApp account
- Access to the number's verification method and its two-step PIN

1 Open WhatsApp settings

In Conversaa, open Settings > Channels > WhatsApp. Choose Connect with Facebook. Enter or set the six-digit PIN when the connection screen asks for it; store it securely.

[Connect WhatsApp ↗](#)

2 Choose the right assets

In Meta's sign-in flow, check the business portfolio, WhatsApp account and phone number carefully. Approve access only for the business you are connecting.

3 Finish the setup

Complete Meta's number-verification steps if shown. Return to Conversaa and let setup finish. If you see Finish setting up WhatsApp, use it rather than repeatedly reconnecting.

4 Check the number in WhatsApp Manager

Select the same business and number. Check connection status, profile and any alerts. A Connected label alone does not prove that a customer received your reply.

[Open WhatsApp Manager ↗](#)

5 Test on a second phone

Send a new customer message to the business number. Check it appears in Conversaa's Inbox and confirm that the reply arrives on the customer's phone. Record any failed-send error before contacting support.

[Open Inbox ↗](#)

You are ready when...

A real customer message reaches the Inbox and its reply arrives on the customer's device.

Keep in mind. Already using this number in the WhatsApp Business app? Ask support to confirm the supported connection or migration path first. Do not delete the account or move an active number to experiment. If self-connection is unavailable, ask for assisted setup; never email passwords, PINs or access tokens.

Official help (may require sign-in): [Meta's WhatsApp setup documentation ↗](#)

BUSINESS IDENTITY · PREPARE + 4 STEPS

Verify your business with Meta

Prepare matching business records and follow the verification process in your own portfolio.

Business verification checks your legal business. Phone verification, display-name review and blue-badge approval are separate processes.

Prepare	What to have ready
Legal business identity	Choose one accepted type: official registration or tax documents, or a business bank statement. Self-filed tax forms are not accepted.
Business address or phone	Business bank statement or utility/telephone bill with matching details. A utility bill must show the legal name but cannot verify that name by itself.
Website and contact access	A working HTTPS business website and access to your business email or phone. Domain-ownership proof may be requested.

1 Select your business portfolio

Open Meta Business Settings with a login that has full control of your business portfolio. Confirm you selected the correct business.

[Open Business Settings ↗](#)

2 Find business verification

Open Security Center > Start verification. If unavailable, check your permissions and Meta's product-specific instructions, or contact support.

[Open Security Center ↗](#)

3 Match the records

Match your legal name and address to current, readable evidence. Fill optional fields only when applicable. Separate address or phone proof may be requested.

4 Confirm and track

Complete the offered contact confirmation, review and submit. Track the decision on this screen and by email. Correct any mismatch Meta identifies.

[Choose a document and understand optional fields ↗](#)

You are ready when...

Meta shows the business as verified. Badge approval remains separate.

Keep in mind. Choose one accepted document per requested proof; Meta may ask for more. Upload directly to Meta and cover unrelated personal information. Unsupported languages need an officially stamped English translation.

Official help (may require sign-in): [Meta: verify your business ↗](#) · [Meta: supporting documents ↗](#)

BUSINESS IDENTITY · DOCUMENT CHECKLIST

Choose your verification documents

Choose an accepted document for your business type. Fill optional fields only when they apply.

You do not need all the documents in the dropdown. Choose one accepted option for the proof Meta is asking for. Further address, phone or ownership evidence may still be needed.

UK option shown by Meta	Use it when it applies
HMRC VAT certificate	Recommended in the shown UK screen; for a VAT-registered business.
Certificate of incorporation	Recommended in the shown screen; for an incorporated business.
Business bank statement	An offered alternative with the matching business details.
Business registration or licence document	An accepted registration or licence for your business.
Business tax document	The UK screen specifies a document issued by HMRC.
Charity documentation	For the relevant charity, using its matching details.

1 Registered or incorporated business

Use a document that matches your business name and the requested details. Choose the country where the business is based: the HMRC options above are UK-specific. Other countries show different choices.

2 Sole trader, non-incorporated or unregistered business

No incorporation certificate? Another offered document, such as a business bank statement, may be suitable. No registration or accepted business evidence? An optional ID field does not guarantee eligibility. Ask Meta which alternative evidence it accepts; never invent an ID.

3 Which fields are optional?

In the shown Business details screen, Business tax ID/Registration Number and Alternative business name are optional. Leave them blank if inapplicable. Business name is required and must match accepted documents. Add a genuine trading name only when relevant.

You are ready when...

You selected a document offered for your country and supplied matching details without inventing optional information.

Keep in mind. Recommended does not mean mandatory. A utility bill, where offered, supports address or phone proof, not legal-name proof by itself. Final acceptance is decided by Meta.

Official help (may require sign-in): [Meta: accepted supporting documents ↗](#)

BUSINESS IDENTITY · 3 STEPS

India: choose your business type

Choose the structure your records support, not the option that sounds more established.

The descriptions below follow the supplied Meta screen. They guide your selection; they are not a legal classification of every Indian entity.

Meta option	When it matches
Corporation	The screen describes a publicly listed corporation. Do not choose this for every registered business.
Sole proprietorship	One owner trading under a business name. This does not mean the business has no registrations.
Partnership	A partnership that matches your legal records and the description in the form.
Private company	A privately held company; check that the description matches your incorporation records.
Institution	An institution such as an educational body, hospital, charity or trust, as described on the screen.

1 Confirm country and legal structure

Use India and your actual business records. For an LLP or an unclear classification, ask Meta which option fits before proceeding.

2 Separate legal and trading names

Enter the legal name exactly as shown on your evidence. Use an alternative business name only when appropriate. Leave a field blank only if the form marks it optional.

3 Prepare the evidence

A sole owner without an incorporation certificate may have other accepted evidence. Having no accepted business evidence is different; ask Meta for alternatives.

[India document checklist](#) ↗

You are ready when...

Your country, business type and names accurately describe the business you are authorised to represent.

Keep in mind. The earlier HMRC document options are UK-specific. Do not use that list as the Indian checklist or invent a registration number.

Official help (may require sign-in): [Meta document requirements](#) ↗ · [Meta verification steps](#) ↗

BUSINESS IDENTITY · 3 STEPS

India: verification checklist

Prepare identity evidence, matching details and a way to confirm your connection.

Meta confirms document categories, not a universal India approval list. The Indian examples below are guidance; use the accepted options shown in your account.

Evidence	What to prepare
Legal business name	Incorporation certificate, official business registration/licence, government-issued business tax document, or business bank statement.
Indian examples	A GST registration certificate fits the tax-document category; an incorporation certificate fits the incorporation category. Acceptance still depends on the review.
Other Indian documents	Do not assume Udyam/MSME, Shop and Establishment registration, a partnership deed or PAN alone is accepted. Check the upload list or ask Meta.
Address or phone	Matching business evidence. A utility bill can support address/phone, but cannot prove the legal business name.

1 Match the details

Have full control of the correct business portfolio. Match legal name, address and phone to your records. Use a working HTTPS website and an accessible business inbox or phone.

2 Upload only requested proof

Select a suitable document for each requested proof. Use clear, unexpired evidence; more documents may be requested. Self-filed tax forms are not accepted. Personal Aadhaar or PAN is not automatically business proof.

3 Confirm your connection and track review

Follow the offered email, phone, SMS, WhatsApp or domain method. Check the result in Meta; its guidance allows up to 14 working days. If rejected, correct the stated mismatch before retrying.

[Open Meta Security Centre ↗](#)

You are ready when...

Meta confirms business verification. WhatsApp number setup, display-name review and badge approval remain separate.

Keep in mind. GST is not stated as mandatory for every business. Optional tax-ID fields do not guarantee eligibility without evidence. If your document language is unsupported, follow Meta's official translation requirements.

Official help (may require sign-in): [Meta document requirements ↗](#) · [Meta verification steps ↗](#)

BUSINESS IDENTITY · 6 STEPS

Get your WhatsApp name reviewed

Help customers recognise your brand instead of seeing only a phone number.

A business name and a phone number can appear together without a blue badge. Changing your name in Conversaa does not change Meta's approved WhatsApp display name.

1 Make the brand easy to verify

Use the real brand consistently on your website and business profiles. If the trading name differs from the legal company name, make their relationship clear on your website and keep supporting records.

2 Check eligibility for name review

Meta links name visibility in chats to account scaling and name approval. Its guidance lists business verification, partner-led verification and quality messaging as scaling paths. Ask support which applies to your account; do not send unwanted messages to meet a threshold.

[Meta's name-eligibility guidance](#) ↗

3 Open the correct number

In WhatsApp Manager, choose your business account, open Phone numbers and select the number customers actually message.

[Open WhatsApp Manager](#) ↗

4 Review the display name

Open Profile, then Edit beside the display name. Use your real brand name, not a slogan, URL or promotional claim. Read Meta's naming guidelines before submitting a change.

[Read display-name guidelines](#) ↗

5 Check the actual review status

Read the name's review status in WhatsApp Manager. Connected is the number's connection status, not display-name approval. A green check inside the name editor alone does not prove the review is complete. Follow any activation instruction Meta shows.

6 Check the customer view

Test on a second phone that has not saved the business number. Check both the chat and business profile. Saved contacts can show a locally saved name. If the expected name is missing, send support the name-review status and the number ID.

You are ready when...

You have confirmed the name-review result and checked how the account appears to an unsaved customer.

Keep in mind. Name visibility is controlled by WhatsApp and can differ by account eligibility, review status and screen. Conversaa cannot force a chat-header name or promise that approval makes it visible everywhere. Do not repeatedly delete and recreate the number.

Official help (may require sign-in): [Meta: changing a display name](#) ↗ · [WhatsApp: business profiles](#) ↗

BUSINESS IDENTITY · CHOOSE YOUR ROUTE

Understand the blue badge

Choose the route that applies to your account. A badge is optional and not guaranteed.

Verification documents do not automatically produce a blue tick. A displayed name, a verified legal business and a verified badge are three different things.

Route	What it means
Official Business Account	Meta assesses whether a WhatsApp Business Platform account represents an authentic, notable brand. Eligibility and application availability are controlled by Meta.
Meta Verified subscription	A separate paid verification product offered to eligible accounts. Availability and compatibility depend on the account, region and product. It is not the same application as Official Business Account status.

1 Check the current eligibility

Meta currently lists an approved display name, two-step verification and at least 30 days on the Business Platform. It also requires business verification or its qualifying high-quality messaging history. Use Meta's current criteria, not a promise from a badge seller.

[Read the application requirements ↗](#)

2 Apply in WhatsApp Manager if eligible

Select your business and number, then Profile > Official business account > Submit request. Supply the website, business details and genuine evidence requested, review and submit. Keep the confirmation. Do not buy or invent press coverage.

[Open WhatsApp Manager ↗](#)

3 If you see Meta Verified in the Business app

Review the in-app eligibility, fee and benefits. Before paying or changing how the number is connected, ask support to confirm compatibility with your current Conversaa connection.

[About Meta Verified on WhatsApp ↗](#)

4 If the option is missing or rejected

Read the explanation in your account and ask Meta support about eligibility. Keep using the supported business account while the issue is reviewed; do not assume a badge is required for normal replies.

You are ready when...

You know which badge route applies and have either followed its application or confirmed why it is unavailable.

Keep in mind. No service can guarantee Meta's approval or a review deadline. A Facebook or Instagram badge is not proof that the connected WhatsApp number has a badge. Never add a fake tick to the profile image.

Official help (may require sign-in): [WhatsApp: verified business accounts ↗](#) · [Meta: Official Business Account applications ↗](#)

CONNECT CHANNELS · 4 STEPS

Connect Instagram and Messenger

Give Conversaa access to the correct professional account and Facebook Page.

Use your own authorised account to approve access. A missing permission or the wrong selected Page can leave a connection looking complete while messages do not arrive.

1 Prepare Instagram

Use a Professional account: Business or Creator. Turn on Allow access to messages in Instagram's settings. Open Settings > Channels > Instagram in Conversaa.

[Instagram settings ↗](#)

2 Connect Instagram

Choose Connect Instagram. Sign in to the intended account and review the requested access. Return to Conversaa, then send a DM from a different account. Confirm that both the incoming message and outgoing reply arrive.

3 Connect Messenger

Open Settings > Channels > Messenger. Sign in with the Facebook account authorised to manage the business Page. Choose the correct Page and approve the required messaging access.

[Messenger settings ↗](#)

4 Test and assign a person

Send a new message to the Page from a separate profile. Confirm delivery in both directions and check that a team member can take over in Inbox. If setup reports missing access, ask the business administrator to correct it.

[Open Inbox ↗](#)

You are ready when...

Each connected channel passes its own incoming-message, outgoing-reply and human-handover test.

Keep in mind. A successful WhatsApp test does not test Instagram or Messenger. Platform rules and account permissions can affect which replies, buttons or notices are available. Always verify the customer experience in that app.

USE CONVERSAA WELL · 5 STEPS

Teach your assistant and set its voice

Give it reliable facts, approve answers and make replies sound like your business.

Better answers start with clear, current business information. Imported website content needs review before it becomes customer-facing knowledge.

1 Add your knowledge

Open Answers. Import from your website or add questions and answers manually. Cover services, prices, hours, location, booking conditions and cancellation rules.

[Open Answers ↗](#)

2 Review drafts before publishing

Check dates, numbers and promises. Select the correct drafts and choose Make selected live. Use the all-drafts action only after checking the whole batch. Confirm the action; do not publish outdated website claims just because they were imported.

3 Set the voice and assistant name

Open AI settings. Choose the tone, describe how your staff should sound and optionally name your assistant. Example: Warm and direct. Give the answer first, keep it short, and ask one useful follow-up.

[Open AI settings ↗](#)

4 Set handover expectations

Decide which issues need a person, such as complaints or uncertain bookings. Use Inbox to pause the AI in a conversation while your team replies, then hand it back when appropriate.

[Open Inbox ↗](#)

5 Run a realistic test

Ask about a price, location, an unknown service and a booking. Send several short messages together and a correction. Check that the response covers the whole question without inventing facts. Update the source answer when something is wrong.

You are ready when...

Live answers are accurate, the voice fits your brand and a team member knows how to take over.

Keep in mind. An assistant name is a brand choice, not a promise that a human is typing. Keep replies honest when customers ask directly. Typing indicators show work in progress; they do not prove that a message has been delivered.

USE CONVERSAA WELL · 6 STEPS

Use bookings, offers and creatives

Publish accurate information and check the complete customer journey before promoting it.

Start with the business facts. An attractive poster is useful only when its price, validity and booking details are correct.

1 Set up bookings

Create the booking form, required questions, hours and capacity. If payment is needed, complete Payments settings and check the amount. Test the form, payment result and confirmation before sharing it.

[Booking forms ↗](#)

2 Add a standalone offer

Use Offers for the offers you want the assistant to use. Check the terms and validity. Keep these distinct from event records in Promotions.

[Open Offers ↗](#)

3 Create an event

In Promotions > Events, enter the title, date, time, timezone, price, conditions and booking details. Attach a poster. Preview the information and publish only when it is correct.

[Open Events ↗](#)

4 Add featured people or products

Use Showcase, labelled Artists, Doctors, Stylists, Trainers or Products for your business. Enter factual details and upload photos. Confirm permission to share photos of people; deactivate entries that should stop appearing.

[Open Showcase ↗](#)

5 Create and refine a poster

Set your logo and brand colours in Brand kit. In Creatives, select the event, describe the look and optionally add reference media. Generate options, select one, request changes and preview the result before publishing.

[Open Creatives ↗](#)

6 Check it on the customer's phone

Ask about the published event and follow Book Now. Verify the correct poster, information and booking destination. Archive outdated material. Deleting a creative is permanent; archived-event deletion retains booking and creative history.

[Brand kit ↗](#) · [Payments ↗](#)

You are ready when...

The published event and poster agree, and the customer can complete the intended booking journey.

Keep in mind. Healthcare: use factual uploaded profiles and informational events. Medical-service discounts and AI creative generation are blocked. Brand kit is under Settings > Promotions; payment setup is under Settings > Payments.

USE CONVERSAA WELL · FINAL CHECKLIST

Go live and solve common issues

Use this final checklist and send the right evidence when you need help.

Review conversations daily during your first week. Fix incorrect business facts before changing the tone or model.

Have these ready

- Every connected channel receives and delivers a real test reply
- Published answers, prices, hours and timezone are correct
- Bookings and payments are tested if enabled
- A named team member monitors handovers and failed messages

What you see	What to do next
Only a number appears	Check name-review status and eligibility. Test with an unsaved contact. This alone does not explain a sending failure.
Reply not delivered	Check delivery status, the exact error, account restrictions and billing alerts. Generated does not mean delivered.
Wrong answer	Correct Business settings or the live answer. Check conflicting answers, then repeat the question.
Poster or button missing	Check event publication, validity, approved poster and booking setup.
Google unavailable	Ask support about Business Profile availability. Connecting Google Analytics does not enable reviews or posts.

1 Contact Conversaa support

Share the business, channel, time/timezone, expected result and exact error or redacted screenshot. Include the number or account ID if relevant. Never share passwords, verification codes, PINs or access tokens.

[Contact Conversaa ↗](#)

2 For a Meta account decision

Sign in to the correct business in Business Support Home. Select the affected asset and explain the issue. Keep the case reference and continue in that case.

[Meta Business Support Home ↗](#)

You are ready when...

Your team can check deliveries, correct answers and get help.

Keep in mind. Meta and Google decide their own approvals. Conversaa cannot grant badges or override restrictions. Follow your account's current options; approval times are not guaranteed.

Official help (may require sign-in): [Google: Business Profile API prerequisites ↗](#) · [WhatsApp Help Center ↗](#)