

Connecting Your WhatsApp Business Account to Updatly.

Updatly runs on your own WhatsApp Business number. This guide takes you from nothing to a live connection — one page to skim, then the detail if you need it.

15

minutes, start to finish

4

steps, all in a browser

0

apps to install, yours or theirs

! Read this first — you need a brand-new number

Updatly can't yet connect a number that's already registered on WhatsApp Business, so you'll need a **brand-new number** to get started. Get a new SIM before you begin: an **eSIM** is easiest, and most recent phones hold a second SIM alongside your normal one. Existing numbers are coming in a later release.

• THE WHOLE THING ON ONE PAGE

Quick Start

Work down the list. Every step has a fuller walkthrough later in this guide.

! Before step 1: get a brand-new number

Updatly only works with a **brand-new WhatsApp Business number** — not one you already use. A new SIM, or an **eSIM** on your existing phone, is the quickest route.

	WHAT YOU DO	WHERE	TIME	DETAIL
1	Sign in to Meta Business Log in at business.facebook.com , or create an account.	Laptop	2 min	p.4
2	Create your Business Portfolio Name, email, submit — then confirm the email Meta sends you.	Laptop	3 min	p.5
3	Add your WhatsApp number Create the account, add your number and display name, verify by SMS.	Laptop	6 min	p.6
4	Connect it inside Updatly Integrations → WhatsApp Business → Add → the five-step wizard.	Laptop	3 min	p.8

You're done when...

Under **Integrations** → **WhatsApp Business** your number shows **Connected** and **Subscribed**. That's the finish line.

What you're actually building

1

A Meta **Business Portfolio**
Your company's container

2

A **WhatsApp Business** account
Holds your new number

3

Updatly, connected to it
Given permission to message

Two more things that trip people up

- **It's all done in a browser.** Nothing gets installed — the only job your phone has is to receive one text.
- **Allow pop-ups for updatly.ai** before step 4 — the Facebook login opens in a pop-up window.

FIVE MINUTES OF PREP SAVES TWENTY

Before You Start

Get these together first. Half of all setup problems are one of these missing.

What you need in front of you

- ☐ **A brand-new number** that isn't already set up as a WhatsApp Business account — see below.
- ☐ **The phone holding it**, able to receive one text. That's its only job.
- ☐ **A laptop or desktop computer**. The whole setup is done in a browser.
- ☐ **A Facebook login** — yours is fine. See the note below.
- ☐ **Your business details**: trading name, business address, business email, website.
- ☐ **Your Updatly login**. If you haven't had one yet, email support@updatly.ai and we'll set it up.

! It has to be a brand-new number

Updatly can't yet connect a number that's already registered on WhatsApp Business, so this first one has to be brand new.

- **Get a new SIM**. An **eSIM** is easiest — most recent phones hold a second SIM alongside your normal one, so no second handset is needed.
- **Pay-as-you-go is fine**. It only needs to receive a verification code and stay active.
- **Don't recycle it later**. The connection is tied to the number — swapping SIMs breaks it.

About the Facebook login

Meta requires a personal Facebook login to administer its business tools — there's no way around it. It doesn't post anything, it isn't shown to your customers, and your personal profile stays separate from the business portfolio you're creating.

What happens once you're connected

We subscribe your team, agree your check-in times and switch on the flows that suit how you work. Your crews install nothing and learn nothing new — everything they send lands as a structured, timestamped record on your side.

1

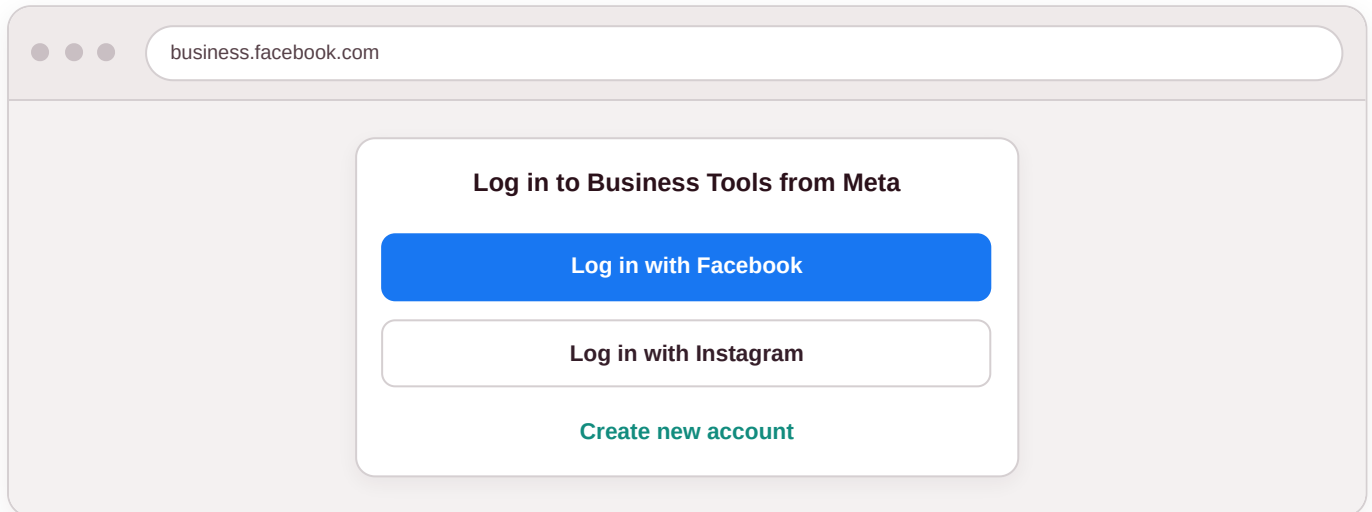
Sign in to Meta Business

Where: Laptop browser

Time: 2 minutes

Go to: business.facebook.com

WhatsApp is owned by Meta, so your business number has to sit inside a Meta business account before anything can connect to it. Open business.facebook.com in your browser.



Two routes from here — **Option A** if you have a Facebook account, **Option B** if you don't

Option A · You already have a Facebook account

- 1 Click **Log in with Facebook**.
- 2 Enter your email or mobile number and password.
- 3 Click **Log in**.
- 4 You'll land in Meta Business Suite. Go to **step 2**.

Option B · You don't have one

- 1 Click **Create new account**.
- 2 Fill in the sign-up form and click **Sign Up**.
- 3 Enter the confirmation code sent to your email or phone.
- 4 Once verified you're logged in. Go to **step 2**.

Why Facebook, when this is about WhatsApp?

Meta uses a Facebook login as the key to all its business tools, WhatsApp included. Nothing gets posted to your profile, your customers never see it, and you can keep your personal account entirely private. Think of it as the door, not the building.

Use an account you'll keep

Whoever's Facebook login you use becomes the administrator of the business portfolio. Use the owner's or a long-term manager's — not an employee who may leave. You can add other admins later.

2

Create your Business Portfolio

Where: Meta Business Suite

Time: 3 minutes

You'll need: Access to your business email

A **Business Portfolio** (Meta sometimes still calls it Business Manager) is the container that owns your WhatsApp number, your permissions and your billing. You only ever need one.

- 1 After logging in, a prompt appears asking you to **create a business portfolio**. If it doesn't, go to **Settings** → **Business portfolios** → **Create**.
- 2 Enter your **business and account name** — the public name of your business. No special characters.
- 3 Enter **your name** as the person setting it up.
- 4 Enter your **business email address**. Use a company address you'll keep, not a personal one.
- 5 Click **Submit**.
- 6 Open the **confirmation email** Meta sends and click the link. Until you do this, you don't have full access.

Create your business portfolio

in Business Manager

Your business and account name

JR Roofing Ltd

Should match the public name of your business. Can't contain special characters.

Your name

Alex Feltwell

Business email address

office@jrroofing.co.uk

We'll send an email to verify it. You'll also receive communications here.

Submit

Three fields, then **Submit**


JR Roofing Ltd has been created

Confirm your email address — click the link sent to office@jrroofing.co.uk to receive full access to this account.

Done

Don't skip the confirmation email

Clicking **Done** closes the box but doesn't confirm anything. You must open the email and click the link, or step 3 will be blocked. Check spam if it hasn't arrived within a couple of minutes.

Check it worked

Go to **Settings** → **People**. You should see yourself listed with full access to the portfolio. That's your confirmation that step 2 is complete.

3

Add your WhatsApp number

Where: Meta Business Settings

Time: 4 minutes

You'll need: Your new number

Two things happen here. First you create a **WhatsApp Business account** inside your portfolio — think of it as the folder your number lives in. Then you add the number itself, along with the **display name** your crews will see on every message.

- 1 In Business Settings, scroll the left menu to **Accounts** and click **WhatsApp accounts**.
- 2 Click **Add**, then **Create a WhatsApp Business account**. (Not "Link" — you don't have one yet.)
- 3 Give it a name and finish the short wizard. You'll land in **WhatsApp Manager**.
- 4 Under **Phone numbers**, click **Add phone number**.
- 5 Fill in your **display name**, **time zone** and **category**, then click **Next**.

USERS

People

Partners

ACCOUNTS

Pages

Apps

WhatsApp accounts

WhatsApp accounts

Add ▾

Create a WhatsApp Business account ✓

You don't have one yet — start here.

Link an existing account

Only if someone has already made one for you.

Left menu → Accounts → WhatsApp accounts → Add → Create

Add phone number

In WhatsApp Manager, under Phone numbers.

WhatsApp Business display name

JR Roofing

This is what your crews see on every message.

Time zone

London (GMT+00:00) ▾

Category

Professional services ▾

Next >

The display name goes to Meta for review

Choose the display name carefully

Meta reviews it. Use your **real trading name** — no ALL-CAPS, no emoji, no web address, and nothing generic like "Roofing". Names that don't match your website or paperwork get rejected.

How long does review take?

Usually minutes, occasionally a day or two. You don't have to wait — carry on to the next page and finish the setup while it's being checked.

STEP 3, CONTINUED

Verify it by text message

Now the number itself. Have the phone with your new SIM next to you — a six-digit code arrives by **SMS**. Nothing is installed on the phone; it just receives one text.

- 1 Enter your **brand-new number**, including the country code.
- 2 Choose **Text message** as the delivery method. (Phone call works too if SMS won't arrive.)
- 3 Click **Next**.
- 4 Type in the **6-digit code** and click **Next** again.
- 5 Your number now appears in WhatsApp Manager. Step 3 done.

Phone number

Add the number this account will message from.

Phone number

Use the brand-new number you got for Updatly.

How should we send your code?

☒ Text message (SMS)

☐ Phone call

Next ›

Pick **Text message** — no app required

Enter your verification code

We sent a 6-digit code by text to +44 7700 900182.

2

0

4

8

1

7

Resend

Next ›

Six digits, straight to the handset

Add a payment method

Meta bills for WhatsApp Business Platform conversations, separately from your Updatly subscription. Add a card under **Billing & payments** in Business Settings now — leave it, and messages stop once the free allowance runs out.

Code not arriving?

Check the country code is right and the handset has signal. Wait for the timer to run out, then request a fresh code — or switch to **Phone call** and Meta will read it out instead.

4 Connect it inside Updatly

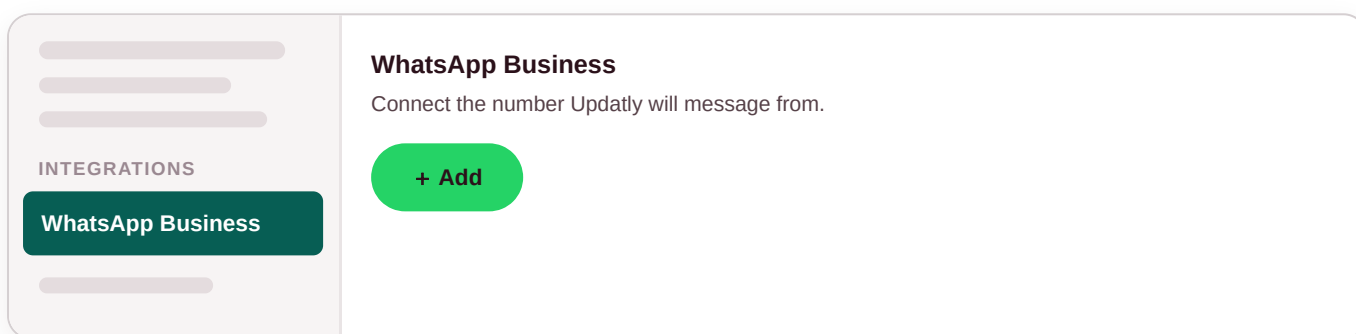
Where: updatly.ai

Time: 3 minutes

Before you start: Allow pop-ups

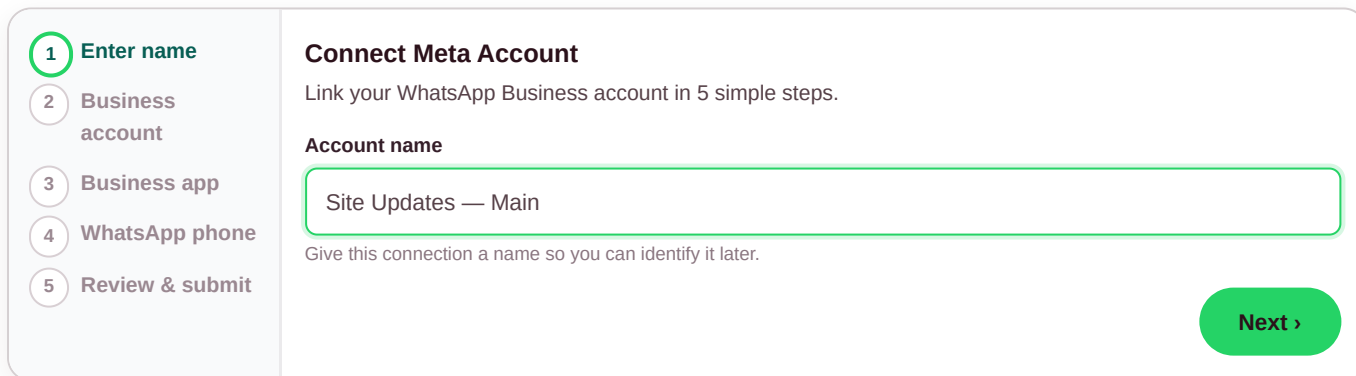
The last step. Updatly walks you through a five-part wizard: name the connection, sign in to Facebook, then pick the business, the app and the number.

- 1 Go to updatly.ai and click **Login** (or **Sign Up** if you're brand new).
- 2 In the **left-hand menu**, open **Integrations**.
- 3 Select **WhatsApp Business**.
- 4 Click **Add**. The **Connect Meta Account** window opens.



Left-hand menu → [Integrations](#) → [WhatsApp Business](#) → [Add](#)

Part 1 · Name the connection



Any label you like — it's only used inside Updatly

• STEP 4, CONTINUED

Sign in and pick your account

Updatly needs Meta's permission to send and receive on your number. That's what the Facebook pop-up does — it's a one-off.

Part 2 · Sign in and grant access

- 1 Click **Connect with Facebook**. A pop-up window opens.
- 2 Click **Continue as [your name]**.
- 3 On *"Choose the Businesses you want Updatly to access"*, select **Opt in to current business only** and tick your business. You must select at least one.
- 4 On the next screen, tick the **WhatsApp account** to use. Check the **WhatsApp Business Account ID** matches the one in your portfolio.
- 5 Review the access request and click **Save**, then **Got it**.

If nothing happens when you click Connect with Facebook

Your browser has blocked the pop-up. Look for a small blocked-pop-up icon at the right-hand end of the address bar, allow pop-ups for **updatly.ai**, and click the button again.

✓ Enter name

2 Business account

3 Business app

4 WhatsApp phone

5 Review & submit

✓ Connected with Facebook

Business account

JR Roofing Ltd ▼

Select the Meta Business account to use.

Back

Next ›

Part 3 · Pick the **business account** — the portfolio you made in step 2

What you're actually granting

Permission for Updatly to **send and receive messages on that number** and manage its message templates. That's the lot — it doesn't give Updatly your personal Facebook profile, your friends list, or any personal WhatsApp chats on your phone. You can revoke it at any time from Meta Business Settings.

• STEP 4, CONTINUED

Choose the app, the number and submit

Two more dropdowns, then the review screen. Each one filters the next, so work top to bottom.

Part 4 · Business app

Choose the Business app to connect.

Business app

JR Roofing

Part 5 · WhatsApp phone

Select the phone number to link.

WhatsApp Business Account (phone)

JR Roofing (+44 7700 900182)

Part 6 · Review and submit

- ✓ Enter name
- ✓ Business account
- ✓ Business app
- ✓ WhatsApp phone
- 5 Review & submit

Review the details below and submit to connect your account.

Account name	Site Updates — Main
Business account	JR Roofing Ltd
Business app	JR Roofing
WhatsApp phone	+44 7700 900182

Back

Connect Meta Account ›

Check the number is right, then [Connect Meta Account](#)

Nothing in the dropdown?

An empty list almost always means no business was ticked on the Facebook permission screen. Run **Connect with Facebook** again and select at least one business and one WhatsApp account.

What happens when you hit submit

Updatly creates the connection and subscribes to your number's messages. Within a few seconds the **WhatsApp Business** page flips to **Connected** and **Subscribed** — the next page shows what that looks like. If it doesn't, refresh once before contacting us.

• CONNECTION LIVE

You're Connected.

Under **Integrations** → **WhatsApp Business**, your number is marked **Connected** and **Subscribed**. That's the whole job done.

WhatsApp Integrations

Manage your WhatsApp Business Accounts (WABA)



• Connected

• Subscribed

Site Updates — Main

+44 7700 900182

WABA ID: 2727 7655 4236 344

+
Connect Another Account

Both pills green — that's what a finished setup looks like

What you can do from here

- **Subscribe users** — add the team members who'll receive check-ins.
- **Unsubscribe users** — take people off when they move on.
- **Edit account details** — rename the connection or update its settings.
- **Manage messaging settings** — flows, timings and escalation contact.
- **Connect another account** — if you run more than one number.

Keep it working

- **Keep the number active.** A cut-off SIM breaks the connection.
- **Keep the display name** as approved — changes trigger a fresh review.
- **Don't delete** the Business Portfolio or remove Updatly's access in Meta.
- **Keep a payment method** on the Meta account.
- **Tell us first** if you're changing phone, SIM or number.

And later: more than one number

Updatly connects **multiple** numbers. When support for already-registered numbers lands, you'll be able to bring your existing one in **alongside** this one — separate numbers for different teams or sites — not instead of it.

Next: your first check-in

Once your team is subscribed we'll set your flows and timings — daily check-ins, toolbox talks, plant checks, and keyword flows like **ISSUE** **EXTRA** **DONE**. Nobody learns anything new; they just reply in WhatsApp.

• IF SOMETHING GOES WRONG

Troubleshooting

Nearly every setup problem is one of these ten.

WHAT YOU'RE SEEING	WHY IT HAPPENS	WHAT TO DO
"You can't use your existing WhatsApp Business number"	Correct — Updatly only supports brand-new numbers today.	Get a new SIM or eSIM and use that instead. Existing-number support is coming in a later release.
"This number is already registered"	The number is already in use as a WhatsApp Business account.	Use a fresh SIM rather than deregistering a number your business still relies on.
Can't create the Business Portfolio	The confirmation email hasn't been clicked.	Open the email Meta sent and click the link. Check spam, then reload Business Settings.
The text code never arrives	Wrong country code, no signal, or the number is on a call.	Check the country code, wait for the timer, then request a new code — or choose Phone call .
Your display name was rejected	Too generic, ALL-CAPS, contains an emoji or URL, or doesn't match your website.	Resubmit using your exact trading name in normal case. Boring and accurate beats clever.
Nothing happens on "Connect with Facebook"	The browser blocked the pop-up window.	Allow pop-ups for updatly.ai in your browser settings and click again.
The Business account dropdown is empty	No business was ticked on the Meta permission screen.	Run Connect with Facebook again and select at least one business and one WhatsApp account.
The WABA ID doesn't match	There's more than one WhatsApp account on the portfolio.	Check the ID under Meta Settings → Accounts → WhatsApp accounts and pick the matching one.
Shows Connected but not Subscribed	The subscription step didn't finish.	Refresh the WhatsApp Business page. If it's still not subscribed after a minute, email support.
Connected, but messages don't send	No payment method on the Meta account.	Add a card under Billing & payments in Meta Business Settings.

When you email us, include these three things

Your **business name**, the **number** you're connecting, and a **screenshot** of where you're stuck. With those we can usually fix it without a call.

• WE'D RATHER YOU ASKED

Stuck? Don't Battle It.

You're one of our first customers. If any part of this took longer than it should have, tell us — it's a fault in the guide, not in you, and we'll fix it for the next person.

EMAIL SUPPORT

support@updatly.ai

Include your business name, the number you're connecting and a screenshot of where you're stuck.

VIDEO WALKTHROUGH & THIS GUIDE

updatly.co.uk/

WhatsappBusinessSetup

The same four steps as a short video, plus this PDF to download and tick through.

A reminder of what happens next

Once you're connected we'll subscribe your team, agree the check-in times and set up the flows that suit how you work. From that point your crews carry on messaging exactly as they do now — and you start getting structured daily reports, with a permanent record behind them.

THE FOUR STEPS, ONE MORE TIME

1

Sign in to Meta Business

LAPTOP

2

Create your Business Portfolio

LAPTOP

3

Add your WhatsApp number

LAPTOP

4

Connect it inside Updatly

LAPTOP



Content in. Structured format out.