



Hades WA

WhatsApp Business CRM

Customer Onboarding & Installation Process

From signed contract to live conversations in 7 days

A step-by-step runbook for the Hades delivery team.

Version 1.0 • Internal & customer-facing

THE 9 PHASES

1. Discovery Call & Requirements (Day 0)
2. Meta Business & WhatsApp Setup (Days 1–3)
3. Platform Provisioning (Day 3)
4. WhatsApp Number Connection (Day 4)
5. Templates & Content Load (Days 4–5)
6. AI Assistant Configuration (Day 5)
7. Team Onboarding & Training (Day 6)
8. Go-Live & Handover (Day 7)
9. Post-Launch Support (Weeks 2–4)

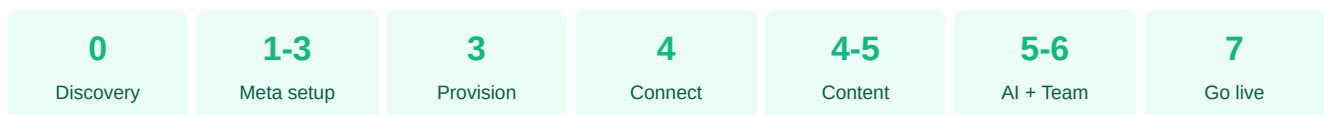
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Overview

What "install" actually means

Installing Hades WA is **not** a software install — the platform is hosted, so there is nothing to deploy on the customer's servers. The 7-day process is about setting up the customer's **WhatsApp Business account with Meta**, wiring it to their Hades workspace, loading their business content into the AI, and training the team. This document describes each phase — who does what, how long it takes, what we need from the customer, and what the customer receives at the end.

Timeline at a glance



Fast-track possible

Customers who already have a verified Meta Business Portfolio and an active WABA can skip most of Phase 2, compressing the timeline to 3–4 days.

Phase 1

Discovery Call & Requirements

DURATION

60 minutes

DAY

Day 0 (contract signed)

OWNER

Hades Account Manager

A single kick-off call to gather everything the delivery team needs. Book within 24 hours of contract signature.

Agenda

- Confirm business identity (legal name, trade licence number, address) — needed for Meta verification
- Confirm WhatsApp number(s) — new or existing, mobile or landline
- Identify current WhatsApp usage — WhatsApp Business App? BSP? Never used? (drives migration risk)
- Map the customer's use case — support, sales, appointments, campaigns, or all
- Identify team members and their roles (admin, manager, agents)
- Agree on knowledge sources: FAQ document, price list, service catalogue, website URL
- Agree on AI persona: tone, language(s), name of the assistant, escalation keywords
- Book the Meta setup call for Day 1

What we ask the customer to bring

- ☐ **Trade licence PDF** — required by Meta for business verification
- ☐ **Business email on the company domain** (e.g., info@clinic.ae — not gmail)
- ☐ **Owner's Facebook account credentials** — needed to create the Meta Business Portfolio
- ☐ **List of team members** — full name + email address for each
- ☐ **Existing WhatsApp content** — welcome messages, FAQ, price list, opening hours
- ☐ **Logo + brand colours** — for the WhatsApp business profile picture

DELIVERABLE

Signed *Discovery Summary* document (1 page) confirming scope, contacts, and Day 1 booking. Sent to customer within 4 hours of the call.

Phase 2

Meta Business & WhatsApp Setup

DURATION

2–3 days (Meta review)

DAY

Days 1–3

OWNER

Hades Tech Lead + Customer

The longest phase — mostly waiting for Meta. We do a screen-share session to walk the customer through Meta's UI once, then monitor approval in the background.

Step 2.1 — Meta Business Portfolio (shared session, ~30 min)

- Create a new Business Portfolio at business.facebook.com (or use existing)

- Add legal business name, address, phone, website, trade licence number
- Upload trade licence PDF for verification
- Add Hades support email as a Business Employee (System Admin role)
- Submit for Meta Business Verification

Step 2.2 — WhatsApp Business Account (WABA) (~15 min)

- Inside the Business Portfolio, create a WABA
- Add the customer's phone number (must be able to receive SMS/voice for OTP)
- Verify the number with the OTP Meta sends
- Register the number on the Cloud API (six-digit PIN set here — record it in the customer's password vault)
- Set the display name (e.g., "Hades Dental Lab") — Meta reviews this within 24h
- Upload the profile picture, business description, category, address, website

Step 2.3 — Meta App & System User (~15 min)

- Create a Meta App (type: Business) that owns the WhatsApp integration
- Get App ID and App Secret — required for webhook signature verification
- Create a System User in the Business Portfolio with Admin access
- Generate a **permanent** access token with the two required scopes: `whatsapp_business_messaging` and `whatsapp_business_management`
- Assign the WABA and the Meta App to the System User

Common blocker: OTP rate limit (error 2494158)

Meta throttles OTP requests aggressively. If the customer clicked "Send code" more than 3 times in an hour, they will be locked out for up to 24 hours. Warn them upfront: *click "Send code" once, wait for the SMS, and only ask us to help if 5 minutes pass with no message.*

Number already on WhatsApp?

If the number is currently used in WhatsApp mobile app or WhatsApp Business App, the customer **must delete the account from the phone first**

(Settings → Account → Delete). Then wait 15 minutes before registering on Cloud API — otherwise Meta returns error 2655122.

DELIVERABLE

Meta Business Verification submitted (approval takes 1–3 days), WABA + phone number registered on Cloud API, permanent access token stored in the customer's password vault, App Secret recorded for webhook signature.

Phase 3 Platform Provisioning

DURATION
45 minutes

DAY
Day 3

OWNER
Hades Tech Lead

Runs in parallel with Meta review. Hades team does this offline — no customer input needed.

Steps

- Create the customer's organization record on the platform (name, timezone, industry, address, contact info)
- Provision the admin user with the primary contact's email
- Send the admin an invitation email with password-set link
- Configure business hours per the customer's schedule (Sun–Sat opening & closing times)
- Load the organization's public holiday calendar
- Apply the correct licence tier (Starter / Pro / Enterprise) and seat count
- Set up subdomain if requested (e.g., wa.customer-domain.com CNAME → whatsapp.hades.ae)
- Enable optional features per contract: Google Sheets sync, custom AI model, extra WhatsApp numbers

DELIVERABLE

Working workspace URL, admin login credentials, all base settings pre-configured. Sent to customer as a private secure link.

Phase 4

WhatsApp Number Connection

DURATION

30 minutes

DAY

Day 4

OWNER

Hades Tech Lead

Meta approval usually completes on Day 3. On Day 4 we wire the number into the platform.

Steps

- Log into the customer's workspace → Settings → WhatsApp Numbers → Add Number
- Enter: Phone Number ID, WABA ID, App ID, permanent Access Token, App Secret
- Platform auto-generates a unique verify token (per-number, per-org)
- Copy the webhook URL and paste it into Meta App Dashboard → WhatsApp → Configuration
- Set the verify token in Meta — Meta immediately hits our webhook to validate → green tick
- Subscribe to webhook fields: messages, message_template_status_update, message_template_quality_update
- Run a test: send a message from a personal WhatsApp to the business number → verify it appears in the platform inbox within 2 seconds
- Send a reply from the platform → verify delivery on the personal WhatsApp

Testing note

Before Meta approves the display name, only pre-registered

Test Recipients

(added via Meta App Dashboard) can receive messages. Add the customer's owner phone as a Test Recipient during setup so smoke tests work.

DELIVERABLE

Live 2-way WhatsApp connection verified with test message. Screenshot of a successful send/receive shared with the customer.

Phase 5

Templates & Content Load

DURATION 3–4 hours + Meta review	DAY Days 4–5	OWNER Hades Content Specialist + Customer
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Templates are the only way to open a new conversation outside the 24-hour window, so this is critical. Meta reviews each template — approval is usually 15 min to 2 hours but can be 24h.

Templates to create by default

TEMPLATE NAME	CATEGORY	PURPOSE
welcome_new_contact	Utility	Sent after a lead form submission or first opt-in
appointment_reminder	Utility	24h before a scheduled appointment
appointment_confirmation	Utility	Confirmation after booking
followup_re_engagement	Marketing	Re-open a stale chat with a special offer
otp_login	Authentication	Optional — only if the customer needs OTP

Steps

- Draft each template (header, body with variables, footer, buttons if needed) with the customer
- Localize to the customer's languages (en / ar are common in UAE)
- Submit each template through the platform's Templates page (which POSTs to Meta)
- Monitor status webhook — approved templates auto-flip to green in the platform
- If rejected, read Meta's rejection reason (shown in the platform), revise, resubmit

Knowledge Base load

- Load 5–20 knowledge documents into AI → Knowledge (FAQ, price list, service catalogue, policies, hours, address)
- Each doc is tagged (pricing / services / policy / location) for later retrieval
- Recommend text or FAQ format — URL and file uploads work but require occasional refresh

Watch out: hello_world template

Meta's built-in `hello_world` template only works from official test numbers. Customers cannot send it from their real number — always create custom utility templates instead.

DELIVERABLE

At least 3 approved templates and 5+ knowledge documents loaded. Customer signs off on template wording and AI knowledge scope.

Phase 6

AI Assistant Configuration

DURATION 90 minutes	DAY Day 5	OWNER Hades AI Specialist
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Configure the AI persona to match the customer's brand and business logic.

Steps

- Create the default AI Prompt Profile — persona, tone, opening greeting, language rules
- Pick the model: **grok-4.3** (fast + cheap, default), **grok-4.5** (balanced), **grok-4.6** (premium)
- Set temperature (30–50 for professional, 60–70 for warm/casual)
- Set max tokens (600 default — WhatsApp replies should stay short)
- Add escalation keywords — words that immediately hand the chat to a human ("refund", "complaint", "cancel", "manager", etc.)
- Test the AI with 10 sample questions in the live tester before going live
- Set the Global AI toggle to **ON** (or leave OFF if customer wants agent-only launch first)
- Configure auto-reply rules for common triggers (greeting → warm reply, after-hours → "we'll get back to you")

Recommended default persona (customer can override)

You are the friendly receptionist for [BUSINESS NAME].
Reply in the customer's language (English or Arabic).
Keep replies short – 1 to 3 short sentences.
Use the knowledge base for pricing, hours, services, and address.
If you don't have the answer, say you'll pass it to the team.
Never invent prices, dates, or promises. Always be warm and professional.

DELIVERABLE Fully configured AI ready to reply. Customer signs off after seeing at least 5 test replies match their brand voice.
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Phase 7

Team Onboarding & Training

DURATION 2-hour workshop	DAY Day 6	OWNER Hades Trainer + Customer's team
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A single live workshop (in-person or Zoom) covering every daily-use feature. Recorded and left with the customer as reference.

Preparation

- Invite all team members via the platform's Team page (email invites sent)
- Assign roles: Admin, Manager, Agent, Viewer
- Each member sets their password via the invite link before the workshop
- Install the Android APK on each team member's phone (link on login page)
- Enable browser notifications on each team member's desktop

Workshop agenda

TIME	TOPIC	WHO
0:00	Platform tour — sidebar, inbox, contacts, dashboard	All
0:20	Handling a live chat — composer, quick replies, templates, media	Agents
0:40	Tags, assignments, statuses, pinning, filtering	Agents + Managers
0:55	Break	—
1:00	Contacts & CRM — notes, follow-ups, tags, AI memory card	Agents + Managers
1:20	AI toggles — global vs per-chat, when to turn AI off	Managers
1:35	Broadcasts & Campaigns — create, target, monitor	Managers
1:50	Reports & team performance	Admin
2:00	Q&A	All

DELIVERABLE

Recorded workshop video, quick-reference PDF cheat sheet, 30-day chat-support access with a private WhatsApp group.

Phase 8

Go-Live & Handover

DURATION 4 hours (paired session)	DAY Day 7	OWNER Hades Tech Lead on standby
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Pre-flight checklist

- ☐ Meta Business Verification approved
- ☐ Display name approved by Meta
- ☐ At least 3 templates approved
- ☐ Test messages to 3 team members' phones successfully delivered
- ☐ AI replies tested with 10+ real-world sample questions

- ☐ Business hours + holidays configured
- ☐ Escalation keywords loaded
- ☐ All team members logged in successfully at least once
- ☐ Push notifications working on Chrome/Edge/Safari and Android app
- ☐ Google Sheets integration configured (if in contract)
- ☐ DNS record for custom subdomain propagated (if applicable)
- ☐ Backup schedule confirmed (daily DB dumps retained 30 days)
- ☐ Monitoring alert channel connected (Slack / Discord / Email)
- ☐ Customer signed off on final acceptance form

Go-live steps

- Flip Global AI toggle ON if customer chose an AI-first launch
- Update the customer's public contact numbers (website, Google Business, Instagram bio) to the new WhatsApp business number
- Send an internal team message: "We're live"
- Hades team on standby via WhatsApp group for the first 4 hours
- Log a live activity every 15 minutes for the first hour to catch any silent failures
- End-of-day recap: message count, AI reply share, any errors, agent feedback

DELIVERABLE

Signed Go-Live Acceptance form. Handover email with all admin credentials, Meta App details, webhook URLs, verify tokens, and support contact.

Phase 9

Post-Launch Support

DURATION

3 weeks

DAY

Weeks 2–4

OWNER

Hades Customer Success

Every customer gets 3 weeks of hyper-care after go-live. After that they move to their normal support tier.

Weekly cadence

- **Week 2 check-in call** (30 min): review inbox volume, AI accuracy, agent feedback, tweak knowledge base
- **Week 3 check-in call** (30 min): review templates performance, campaign metrics, add new auto-reply rules
- **Week 4 handover** (30 min): move customer to standard support, hand over to Customer Success rep
- Response SLA during hyper-care: 15 min for critical, 2h for standard (Sun-Thu 9am-6pm Dubai)
- Access to Hades Slack channel for direct engineering questions
- One free AI persona re-tune if the customer wants to iterate

Standard support after Week 4

TIER	RESPONSE SLA	CHANNELS
Starter	1 business day	Email
Pro	4 business hours	Email + WhatsApp
Enterprise	30 min critical / 2h standard, 24/7	Email + WhatsApp + phone + dedicated CSM

RACI Who does what

TASK	CUSTOMER	HADES
Provide trade licence + business info	✓ Owns	Reviews
Create Meta Business Portfolio	Screen-shared	✓ Drives
Verify phone number (OTP)	✓ Owns (needs SIM)	Guides
Register on Cloud API	Approves	✓ Executes
Create Meta App + System User + tokens	Approves	✓ Executes
Provision Hades workspace	—	✓ Owns
Connect WhatsApp number to platform	—	✓ Owns
Draft template wording	Approves	✓ Drafts
Submit templates to Meta	—	✓ Owns
Load knowledge base content	Provides content	✓ Loads
Configure AI persona + rules	Approves	✓ Configures
Invite team members	Lists them	✓ Invites
Team training workshop	Attends	✓ Delivers
Update public-facing contact info	✓ Owns	Reminds
Go-live acceptance sign-off	✓ Owns	—
Ongoing operational use	✓ Owns	Supports

Risks Common blockers & mitigations

RISK	IMPACT	MITIGATION
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Meta Business Verification rejected (missing docs)	Blocks go-live entirely	Pre-check trade licence quality in Phase 1; require a business email on company domain
Phone number already registered elsewhere	Cloud API registration fails	Have customer delete WhatsApp mobile install before Phase 2; wait 15 min
OTP rate limit hit	24-hour delay to Phase 2	Warn customer upfront — one click only
Templates rejected repeatedly	Slows Phase 5	Follow Meta template guidelines strictly; avoid marketing language in Utility templates
Display name rejected	Cannot message non-test numbers	Use legal or well-known trade name; avoid trademarks the customer doesn't own
Customer's team doesn't attend training	Adoption fails post-launch	Contract clause requires all agents to attend or reschedule
Knowledge base too thin at launch	AI defers too often	Require minimum 5 KB docs before Phase 6 sign-off

Add-ons

Optional paid extensions

Available at any phase or after launch — priced separately.

- **Custom subdomain + SSL** (wa.customer-domain.com) — 1 day, one-off setup fee
- **Google Sheets sync** — 2 hours, one-off setup fee
- **Custom AI persona per campaign** — 4 hours per persona
- **Data migration from existing BSP** (contacts + historical chat log) — 1–3 days depending on volume
- **iOS app build + TestFlight** — 1 week (requires customer's Apple Developer account)
- **White-label branding** (logo, colours, domain) — Enterprise tier only
- **Custom integration** (Salesforce, HubSpot, custom API) — scoped separately
- **Additional WhatsApp numbers** — 1 day per number (Phase 2–4 repeated)
- **Facebook & Instagram DM unified inbox** — 3 days integration