Your recalls go by text from day one. Connecting WhatsApp moves them to WhatsApp, with your practice name and logo on every message.

This guide walks through the three steps in order, says what you will see, and what to do if something stops. Verifying your business with Meta is optional and comes at the end: your recalls go by WhatsApp without it.

HAVE THESE TO HAND

- Fifteen minutes with us on a video call, if you would like it. We do step 1 together with every practice: reply to your welcome email with a time that suits.
- The Facebook login you use for the practice. If the practice has no Facebook login, create one in the practice name first.
- Only if you choose to verify your business later: one document showing the legal name and address, such as your company registration, a utility bill or a bank statement.

THE THREE STEPS

- 1. In Recallist, press Connect WhatsApp. Two minutes.
- 2. In the Facebook window, sign in and confirm the practice. Three minutes. This creates your WhatsApp business account.
- 3. Nothing. Meta approves your messages, usually within hours and up to 48. You get an email and your Settings say live. Your recalls go by text until then.

OPTIONAL, LATER: VERIFY YOUR BUSINESS WITH META

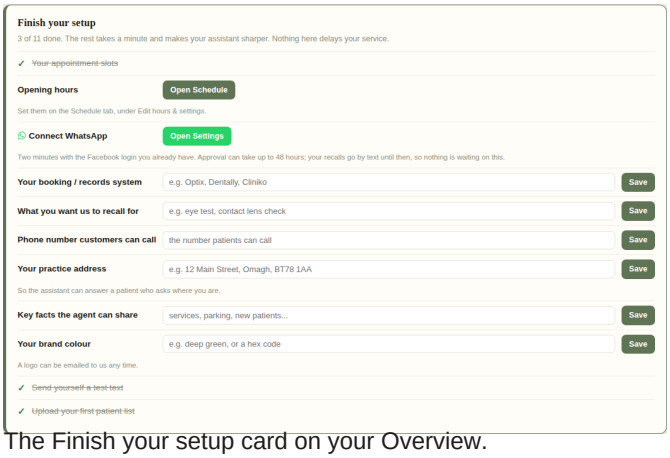
- Not needed to go live. Meta approves your messages and raises your sending limit without it. Worth ten minutes once you are running: Meta is gentler with verified accounts, and it unlocks more numbers later.
- Before you connect, Meta says your organisation does not need to be verified: that is normal. The option appears once your WhatsApp account exists.
- Go to business.facebook.com and sign in with the practice's Facebook login. Open Settings, then Security Centre. The right page is headed Business verification. If the page you land on mentions ads or an advertiser, that is a different check: close it and open Security Centre.
- Under Business verification, choose the use case "Setting up a WhatsApp Business account" and press Start verification. The name must match your document.
- Press Get started, then: Select a country (Ireland or United Kingdom). Select your business type: Private company for a limited company, Sole proprietorship if you trade in your own name.
- Add business details: the legal name exactly as on your document (for a limited company, the name on the certificate), with the trading name patients know as the alternative name. If the Facebook business is named differently, change it to match first.
- Confirm your connection to the business (an email at the practice's own domain is simplest), then upload the document.
- Meta answers within a day or two. If it rejects the documents, the usual reasons are a name that does not match the document character for character, or the wrong kind of document. When it says Verified, as below, tell Recallist with one press.



support@recallist.co.uk

IF YOU VERIFY, TELL RECALLIST

- Your Overview has a Finish your setup card with an optional step called Verify your business with Meta, just under Connect WhatsApp. It is never counted against you.
- When Meta says Verified, press "Done, Meta has verified us" on that step.
- The same button is on the WhatsApp card in Settings, under More, if you would rather do it there.



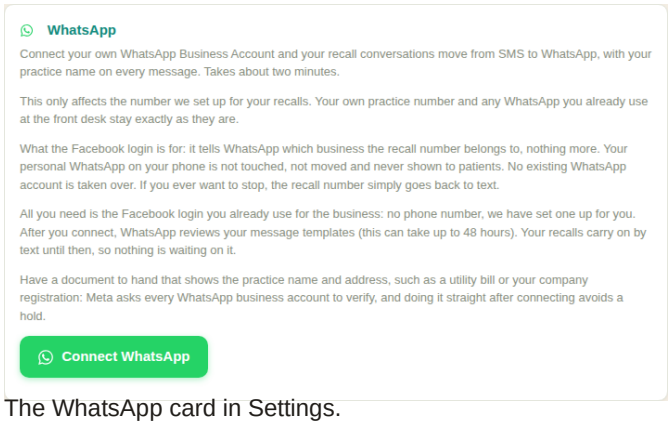
The Finish your setup card on your Overview.

WHY VERIFICATION CAN WAIT

- Meta approves your messages and raises your sending limit without it, so nothing about your recalls waits on it.
- A verified business is treated more gently by Meta's automatic checks, and if Meta ever holds an account, verification is part of lifting the hold. That is why it is worth doing once you are running.
- Your recalls go by text throughout, so nothing waits on any of this.

STEP 1. IN RECALLIST, TWO MINUTES

- Open your portal, then More, then Settings, then the WhatsApp card.
- Read the card, then press Connect WhatsApp. A Facebook window opens.



The WhatsApp card in Settings.

STEP 2. THE FACEBOOK WINDOW

- Sign in with the practice's Facebook login.
- Meta asks which business this is for. Pick the practice, or create it in the practice name exactly as on your document. The display name patients see is your practice name: no web address or slogan, Meta rejects those.
- Meta then asks for a WhatsApp phone number. Open the drop-down and choose "Use a display name with a virtual number instead", type your practice name as the display name, and press Next. Do not type a number: Recallist adds the recall number it set up for you afterwards, by itself. Your practice phone is never used.
- Meta says the business name and display name will be reviewed and may take up to five working days. That review is for Meta's placeholder number only and does not hold up your recalls.
- Next, Meta asks which business portfolio and WhatsApp account to share with Recallist. Pick your practice, and under WhatsApp Business account choose "Create a WhatsApp Business account".
- Press Finish. The window closes and your Recallist Settings say WhatsApp is connected and waiting for Meta.

WHAT META DOES NEXT

- Meta reviews your display name and your first messages. This usually takes a few hours and can take up to 48 hours.
- Recallist checks the connection every few minutes. If Meta refuses the number, Recallist takes another one for you. If Meta holds the account, your Settings tell you and point to the page to use.
- Your recalls go by text until Meta approves. Nothing waits on this.

WHAT HAPPENS WHEN META APPROVES

- You get an email, "your WhatsApp is live", and your Settings say so.
- Patients not yet contacted get their recall by WhatsApp from the next sending run, with text as the fallback for anyone WhatsApp cannot reach.
- Patients already in a text conversation carry on by text. Nothing is sent twice.

IF SOMETHING STOPS

- Settings say "WhatsApp has not accepted your number yet": nothing for you to do. Recallist is taking another number and your texts carry on.
- Settings say "Meta has put a hold on your WhatsApp business account": verify your business if you have not yet (the optional section on page 1), then go to business.facebook.com/business-support-home and press Request review. Meta usually clears it within a day or two.
- Meta asks for a different document: a second one with the same name and address is usually enough.
- Meta says the name does not match: change the Facebook business name to the one on your document, then try again.
- Anything else: send Recallist a screenshot and we take it from there.

THREE THINGS THAT NEVER CHANGE

- Your practice phone number and any WhatsApp you use at the front desk are not touched.
- Your personal WhatsApp is not moved and never shown to patients.
- You can go back to text at any time from Settings.

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