

WhatsApp Business API Readiness Checklist

Going from the WhatsApp Business app to the official API takes some preparation. Work through these before you start.

Accounts and number

- ☐ Do you have a verified Meta Business account?
- ☐ Is the phone number you plan to use free of an active WhatsApp or WhatsApp Business app registration, or are you ready to migrate it?
- ☐ Does your business name match your public website and documents?
- ☐ Do you know who will be the admin on the account?

Messaging plan

- ☐ Which messages will you send: updates, reminders, support, marketing?
- ☐ Are your message templates written and approved by Meta?
- ☐ Do you know the difference between service and template conversations and how they are priced?
- ☐ Who answers customer replies, and during which hours?

Consent and compliance

- ☐ Do customers explicitly opt in before you message them?
- ☐ Can customers opt out easily?
- ☐ Is your privacy policy linked and accurate?
- ☐ Do you avoid messaging people who have not agreed to hear from you?

Systems and integration

- ☐ Which system triggers messages: ERP, CRM, billing, website?
- ☐ Do you need a shared inbox for your team?
- ☐ Do you need chatbots or automation for common questions?
- ☐ How will you track delivery, replies and results?