

How to Configure SMS and WhatsApp Conversations in WMS

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i This Guide explains how to configure SMS and WhatsApp conversations in WMS.

Other documentation: [How to send and receive SMS/ MMS via CLASSOUND](#), [WhatsApp Integration with x-bees](#)

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Introduction

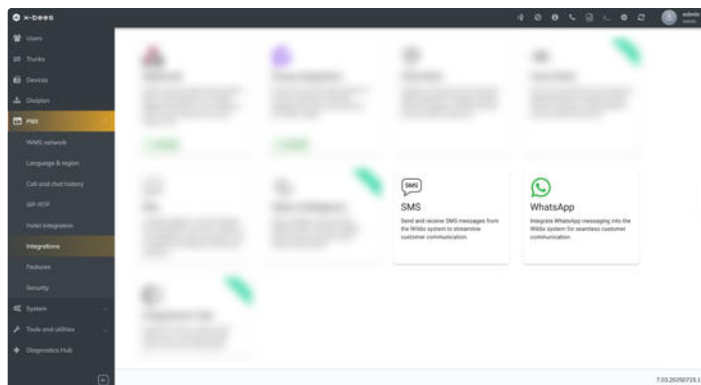
Kite functionality includes a set of features which allow to have all conversations in one unified inbox, including SMS and WhatsApp conversations.

Starting from x-bees / Collaboration 7 app v. 2.24.1, it is necessary to configure SMS and WhatsApp conversations via the *SMS/ WhatsApp* section in WMS -> *PBX* -> *Integrations* -> *Cloud integrations*. See the step-by-step instructions below.

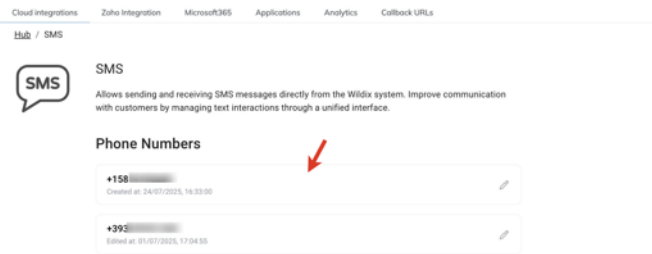
⚠ Note: WhatsApp integration is supported within x-bees only.

SMS / WhatsApp Setup

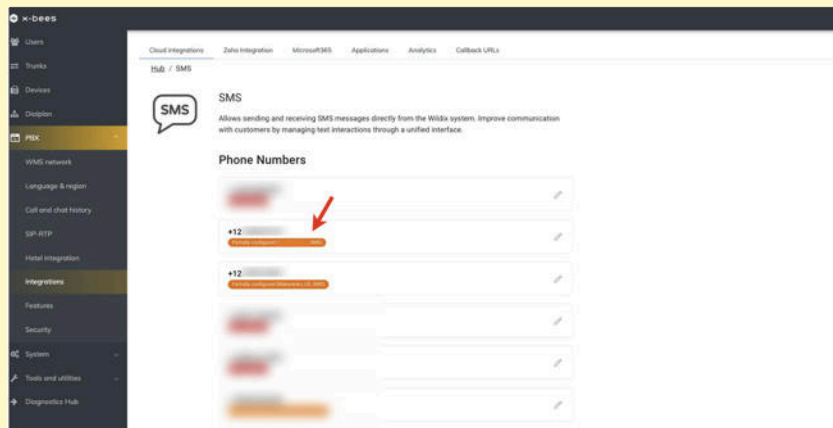
1. Go to WMS -> *PBX* -> *Integrations* -> *Cloud integrations* -> navigate to the *SMS/ WhatsApp* section:



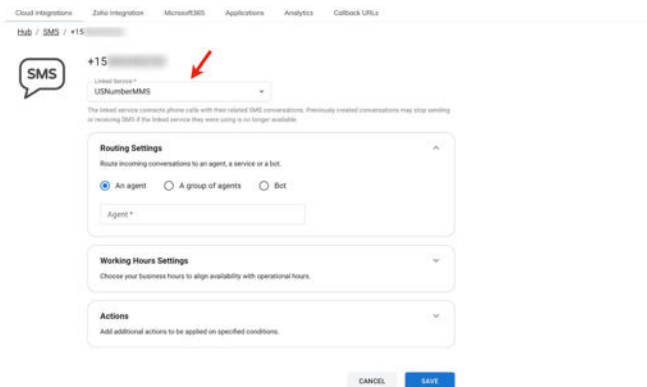
2. The list of available CLASSOUND DID's are displayed. Choose the number you wish to configure and click on it:



⚠ Note: "Partially configured" flag shows outdated or incomplete settings, which means the data was migrated from a Call Group, and the configuration needs to be reviewed and saved again to ensure everything works correctly.



3. In the *Linked Service* field, choose the service you want to link to this phone number:



⊗ Important:

- Only one service can be linked. In case of changing the linked service, conversations that were previously created for this phone number with the previous linked service stop working.
- Services act as unique identifiers. A single service may link calls, SMS, and WhatsApp into one conversation.

4. In the *Routing Settings*, you can choose if you want to route incoming conversations to:

- An agent

- A group of agents
- Bot

The screenshot shows a configuration page for an SMS conversation. At the top, there are navigation tabs: Cloud Integrations, Zoho Integration, Microsoft365, Applications, Analytics, and Callback URLs. Below this, the page is titled 'Hub / SMS / +15'. A 'Linked Service' dropdown is set to 'USNumberMMS'. A note states: 'The linked service connects phone calls with their related SMS conversations. Previously created conversations may stop sending or receiving SMS if the linked service they were using is no longer available.' The 'Routing Settings' section is highlighted with a red box and contains the following options: 'Route incoming conversations to an agent, a service or a bot.' with radio buttons for 'An agent', 'A group of agents' (selected), and 'Bot'. Below this is a 'Service' dropdown set to 'USNumberMMS'. Other sections include 'Working Hours Settings' (Choose your business hours to align availability with operational hours.) and 'Actions' (Add additional actions to be applied on specified conditions.). At the bottom are 'CANCEL' and 'SAVE' buttons.

Note:

1. In case of **routing to a Service** (Call group), the following rule applies:

- In case of choosing a group of agents in Routing Settings, you can choose the same service as the linked service or a different one. When there is an incoming SMS, a conversation is created and agents from the Service indicated in Routing Settings are automatically added to the conversation.
- If no agents from the call group is present in the conversation, all agents from the call group are added.
- If at least one agent from the call group is already in the conversation, no additional agents from the call group are added.
- If an agent specified in Routing Settings is removed from the chat (either manually or by leaving it), they will be automatically re-added when a new message arrives from the SMS or WhatsApp number. This occurs even if other agents are still present in the chat.

2. **Routing to a Bot** has the following logic:

- If routing is configured to the bot and the bot is already present in the chat, the bot only responds outside of working hours.
- During working hours, the bot stops responding and the conversation is handled by a human agent.
- Unless the bot is manually removed, the bot remains in the chat and continues responding during out of working hours.
- If an agent removes the bot, it becomes inactive and does not interfere.
- If the bot adds a user to the chat or an agent joins via Live Dashboard, routing remains unchanged and the bot continues functioning according to its working hours rules.

5. (Optional) Set working and out of working hours. If an external user sends a message during working/ out of working hours, the system routes the message to the configured agent, group of agents, or bot.

Cloud integrations Zoho Integration Microsoft365 Applications Analytics Callback URLs

Hub / SMS / +15: [redacted]

SMS +15: [redacted]

Linked Service*
USNumberMMS

The linked service connects phone calls with their related SMS conversations. Previously created conversations may stop sending or receiving SMS if the linked service they were using is no longer available.

Working Hours

Routing Settings
Route incoming conversations to an agent, a service or a bot.

An agent A group of agents Bot

Service*
USNumberMMS

Working Hours Settings
Choose your business hours to align availability with operational hours.

Day* Time* to Time*

Weekdays 08:00 to 18:00

ADD RULE

Time zone*
GMT-03:00

You can add multiple rules if needed:

Working Hours

Routing Settings
Route incoming conversations to an agent, a service or a bot.

An agent A group of agents Bot

Service*
USNumberMMS

Working Hours Settings
Choose your business hours to align availability with operational hours.

Day* Time* to Time*

Weekdays 08:00 to 18:00

Day* Time* to Time*

Saturday 10:00 to 15:00

ADD RULE

Time zone*
GMT-03:00

For *Out of working hours*, you need to choose *Routing settings* (can be same or different from Working hours, e.g. you can route conversations to the Bot):

Out Of Working Hours

Routing Settings (Out Of Working Hours)
Route incoming conversations to an agent or a bot and welcome your customers with predefined messages.

An agent A group of agents Bot

Bot*
Test

Actions (Out Of Working Hours)
Add additional actions to be applied on specified conditions during out of working hours.

6. (Optional) If you want to set predefined actions which are triggered in some conditions (e.g. in case there is no reply, message was not read), click **Add Action** in the Actions section:

SMS +15

Linked Service *
USNumberMMS

The linked service connects phone calls with their related SMS conversations. Previously created conversations may stop sending or receiving SMS if the linked service they were using is no longer available.

Routing Settings
Route incoming conversations to an agent, a service or a bot.
 An agent A group of agents Bot
 Service *
USNumberMMS

Working Hours Settings
Choose your business hours to align availability with operational hours.

Actions
Add additional actions to be applied on specified conditions.
 ADD ACTION

CANCEL SAVE

On the Add a new Action screen, choose the necessary condition:

- *No reply*: action is triggered if no agent replies within a defined time (from 5 seconds to 1 day)
- *Not read*: action is performed if no one reads the message within a specified interval
- *No activity*: action is triggered if there's no chat activity (no messages from user or agent) for the predefined duration of time

⚠ Note: Joining the conversation from Live View and assigning the conversation are not available in the Activity section.

Add New Action

Conditions

No reply ^ in 15 minutes

No reply
Not read
No activity

Send message

Bot *

Message *

Execute specified task only once per conversation.

CANCEL APPLY

Then, choose an action. There are two types of available actions:

- *Send message*: allows to send a predefined message (e.g., "All agents are currently unavailable, we'll get back to you later.") if the condition is met

For this type of action, you need to choose the Bot to perform the action.

Add New Action

Conditions

No reply in 1 hour

ADD CONDITION

Task

Task *

Send message

Send message

Add members

Execute specified task only once per conversation.

CANCEL APPLY

- *Add members*: adds participants to the conversation. Choose member(s) that should be added to the conversation once the condition is met:

Add New Action

Conditions

No reply in 1 hour

ADD CONDITION

Task

Task *

Add members

Agents *

Marina Test Bill

Execute specified task only once per conversation.

CANCEL APPLY

If you want the action to run only once per conversation, enable the option **Execute specified task only once per conversation**. Otherwise, the action is performed each time the conditions are met.

Add New Action

Conditions

No reply in 10 minutes

ADD CONDITION

Task

Task *

Send message

Bot *

Test

Message *

All agents are currently unavailable, we'll get back to you later.

Execute specified task only once per conversation.

CANCEL APPLY

- Click **Apply** to save the action

Note:

- You can configure actions to send one-time notification (e.g. "We'll get back to you later") or set up multiple actions.
- Up to 3 conditions can be set per Action.
- If no Conditions are added, the Action is triggered after every message.
- If a bot is configured in *Send message* Action, and an agent removes this bot from the conversation, the bot will be automatically added to the conversation and continue executing the action.
- In case a bot was configured in Actions, but was later deleted from the Chat Bots list on PBX, the bot will still be added to the conversation and continue executing the action (the "Send message" task).
- When agents are added to the conversation via the "Add members" action, no system message is displayed.

- Click **Save** to save the changes:

The screenshot shows the configuration page for an SMS service. At the top, there's a header with an SMS icon and a phone number starting with '+15'. Below this, a 'Linked Service' dropdown is set to 'USNumberMMS'. A small note explains that the linked service connects phone calls with their related SMS conversations. The main configuration area is divided into three sections: 'Routing Settings' (with radio buttons for 'An agent', 'A group of agents', and 'Bot'), 'Working Hours Settings', and 'Actions'. The 'Actions' section shows a condition 'No reply in 5 minutes' and a task 'Send message: "All agents are currently unavailable, we'll get back to you later"'. At the bottom right, there are 'CANCEL' and 'SAVE' buttons, with a red arrow pointing to the 'SAVE' button.

Outgoing SMS / WhatsApp messages routing

When an outgoing SMS is initiated, the system checks for routing configuration in the following order:

1. *CLASSOUND configuration* (primary): if a matching configuration is found, it is used.
2. *Call group settings in the Dialplan*: in case nothing is found in the primary configuration, the system checks the call group settings and applies them if found.

Linking Call and SMS/WhatsApp Conversations

In case there was call with and later an SMS or WhatsApp conversation is created with the same external contact, the call conversation and SMS/ WhatsApp conversation are linked and the conversation history is preserved. If another agent uses the "Create conversation" option to start an

SMS or WhatsApp chat with the same number and service, they will automatically join the existing conversation and have access to the full conversation history.

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