ENGLISH

User manual

Your complete guide to Zynd Connect, from your first account to daily operations.

30 chapters · Complete tutorial · Everyday use

Edition of 7 October 2026

From your first account to your first conversation, then managing your team, subscription and data.

This edition describes the customer portal. Illustrations contain fictional data. Your quote, accepted terms and the options visible in your workspace govern your use.

https://connect.zynd.io/en/manual

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Chapter 01 / 30 · Start and find your way

Understand Zynd Connect

Read this chapter online

Zynd Connect links your WhatsApp number to your business. Your workspace lets you connect a number, read conversations, reply and manage your subscription. Your business software can also use that number to send messages and receive replies.

What you do and what the platform does

You decide whom to contact, why and what to say. You choose a plan, link an authorised phone and grant your team appropriate access.

Zynd Connect stores available conversations, shows your connections, processes sending requests and displays their outcomes. It also tracks credit, reservations, payments and service periods.

Business software can trigger an order confirmation. The message goes through your connected number; a reply can appear in your inbox and be forwarded to your tool.

Example: confirming an order

1. Awa confirms an order in your sales software.
2. Your team sends a confirmation from WhatsApp in the portal, or your integration triggers that send.
3. Zynd Connect shows the request and processing status. Acceptance means WhatsApp accepted the send.
4. The customer replies. Your team finds the message in Inbox and continues the conversation.

Understand the boundaries before starting

The customer portal uses your email and password or a passkey. The site’s Administration link is for platform operators; it is not your customer workspace.

The service links a device to your WhatsApp account. It is not presented as automatic activation of Meta’s official WhatsApp Business API.

Creating a workspace does not immediately provide an active plan, real allowance or connected number. Campaigns, bots, CRM synchronisation and WhatsApp reminders need a suitable integration; the portal does not have a universal button to automate them.

Chapter 02 / 30 · Start and find your way

Your first complete journey

Read this chapter online

Follow this journey in order. You can stop after any step and resume from Overview.

Have these things ready

An accessible email address, your business name, a device to open the portal and the phone with the WhatsApp number you want to link. You must be able to open WhatsApp and authorise a linked device.

Choose a test contact who agrees to receive your message. Use their real international number; the names, amounts and references in this manual's illustrations are fictional.

Billing is displayed in FCFA/XOF. Check prices, limits and payment methods shown when you make a request.

From signup to your first reply

1. Open the site, select Create account and complete signup.
2. Open the verification email and choose your password.
3. In the customer portal, check your organisation name and role.
4. In Security, add a passkey or two-factor authentication and save your recovery codes.
5. In Billing, configure a plan and request the exact quote.
6. If needed and payments are available, top up your balance. Wait for confirmed credit.
7. Return to the quote, accept the terms and confirm activation. Check Subscription active and the end date.
8. In WhatsApp, create a connection, start it, open the QR and scan it with your phone. Wait for Ready.
9. Send a short message to your test contact. Note the operation ID and check Activity.
10. Ask your contact to reply, open Inbox, choose the connection and conversation, then send a reply.

How to know the journey worked

Your plan is active, your connection is ready and your contact has actually received the message. A queued or accepted row alone does not confirm receipt.

You can find their reply under the correct connection and know your renewal date. To automate later, prepare keys and webhooks with the person responsible for your tools.

Chapter 03 / 30 · Start and find your way

Create and verify your account

Read this chapter online

Signup opens your workspace. It does not charge you or activate WhatsApp service by itself.

Complete the form

1. Open /en/signup from Create account. Choose English if needed.
2. Enter your business name, your name and email. Choose the plan you are interested in; you can review that choice in your workspace.
3. Read the terms linked from the form and tick the required acceptance.
4. Submit once. The confirmation screen shows the destination email address.

Open the verification email

1. Check your email and spam folder. Open the Zynd Connect message sent to your address.
2. Follow the verification link. For a new registration, the link is valid for 24 hours.
3. Choose a unique password with 12 to 128 characters. Finish opening your workspace.
4. Check the displayed organisation before choosing a plan or connecting a number.

If the email does not arrive

Wait a few minutes, check the email spelling and spam folders. Resend link requests another email after the displayed delay; sends are limited to five per day. Use the newest link.

Change email returns to the signup details. If the address already has an account, no new signup link is sent: use Sign in or Recover access.

An invalid, expired or already-used link needs a fresh link. If another account is open in your browser, sign out to use the link with the account it was sent to.

Chapter 04 / 30 · Start and find your way

Sign in, accept an invitation and recover access

Read this chapter online

Use the customer portal at /portal. Each person should use their own account, even when you work in the same organisation.

Normal sign-in

1. Open the customer portal and select your language.
2. Enter your account email and password.
3. If two-factor authentication is enabled, enter the code from your app or an unused recovery code.
4. If a passkey is registered, Sign in with a passkey opens the browser or device confirmation.
5. Check the organisation name when you arrive. Sign out after using a shared device.

Accept a team invitation

Open the invitation sent to your email address. Check the displayed recipient and organisation. If this creates your first account, enter your name and a password. Follow the screen if your account already exists.

An invitation is not a password reset link. Expired or revoked invitations need a new invitation from the owner. A pending invitation reserves a place within the team limit.

Forgotten password or lost device

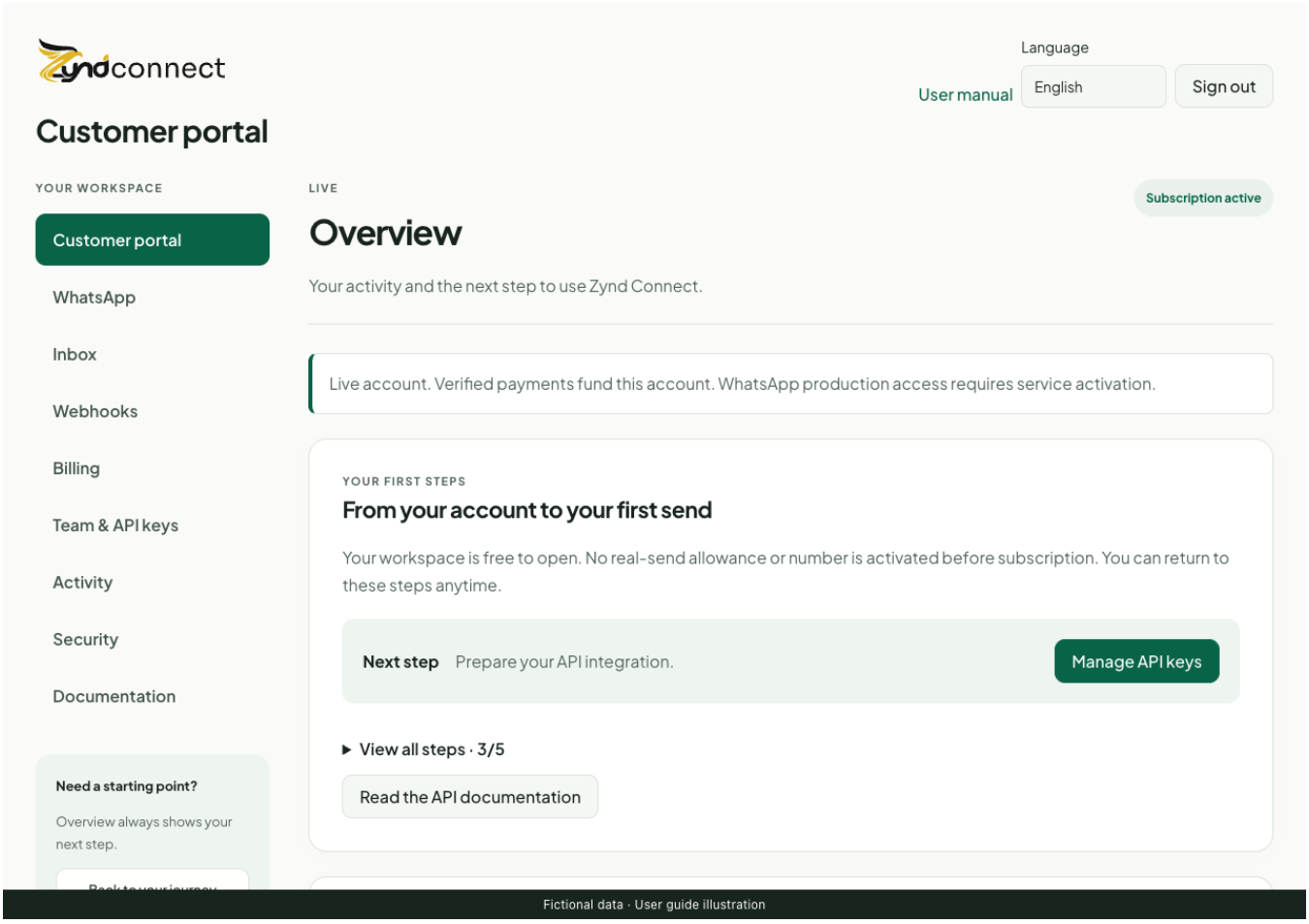
1. Choose Recover access or Forgot password on the sign-in screen.
2. Enter the account email and request the link. The screen may confirm the request without revealing whether an address is registered.
3. Open the new message and choose a password with at least 12 characters.
4. Sign in again. Password recovery keeps security factors active; use your authenticator, a recovery code or a passkey.
5. If no factor is available, contact your organisation owner. They can start factor recovery after verification. If you are the sole owner, contact Zynd Connect.

Chapter 05 / 30 · Start and find your way

Find your way around and choose the right organisation

Read this chapter online

The menu follows your role and organisation mode. A missing section may reflect a permission you do not have.



Portal illustration with fictional data. No real message or payment.

The portal menu

Section	What it does
Overview	Your organisation, balance, projects and next step.
WhatsApp	Create, link and manage connections; send an initial text.
Inbox	Read retained conversations, download attachments and reply.
Webhooks	Forward events to tools and inspect failures.
Billing	Plans, quotes, top-ups, renewal, terms and refunds.
Team & API keys	Invitations, roles and software access; owner only.
Activity	Track the latest 50 operations and offered cancellations.
Security	Your password, sign-in factors, sessions and data management.
Documentation	Integration reference for the person configuring your tools.

Switch organisation or language

1. If you belong to several organisations, use the organisation selector at the top of the portal. It does not appear if you have only one.
2. After switching, check the name, role and Live or Sandbox mode. Balance, connections and keys belong to the selected organisation.
3. Use the language selector. This manual is also available in Français or English, with matching chapters.
4. On a small screen, use the navigation dropdown. Back to conversations returns to the inbox list.

Roles: who can do what?

Role	Use
Owner	Manages team, keys, projects, numbers, sending and billing; can export and request closure.
Developer	Manages connections, sends and replies, configures webhooks; does not manage the team or authorise billing debits.
Billing	Manages plans, top-ups and refund requests; WhatsApp, Inbox and Webhooks sections are not offered.
Read only	Views information allowed by their access; does not connect a number, send or change settings.

Remember
The owner should check the role before every invitation. Owner access enables important actions involving the team and money.

Chapter 06 / 30 · Start and find your way

Read Overview and organise projects

Read this chapter online

Overview brings together your organisation, selected plan and available amounts. It helps you choose the next action.

Understand the counters

Information	How to read it
Available balance	Usable prepaid credit. It funds confirmed quotes and extra sends under your plan.
Included sends remaining	Sends still available in the active period. This is a count, not money.
Reserved	Credit or included sends held while a request is processed. The final outcome determines consumption or release.
Subscription active / Awaiting activation	Shows whether a service period is active. A positive balance alone does not activate service.

Create a project

1. In Overview, expand Projects. Review the project already in your workspace.
2. If you are an owner, enter a clear name such as Main shop or Customer service. Names can contain up to 120 characters.
3. Select Create project. Check that it appears in the list before creating a connection.
4. When creating a connection or key, choose the relevant project. Project-limited keys avoid granting access to all your activities.

Reservation example

A sending request reserves an included unit when available, otherwise the overage amount specified by your plan. The reservation may stay visible until the outcome is confirmed.

Refresh Activity before concluding that money was lost. A confirmed failure releases the reservation; an uncertain outcome needs clarification before a new send. Amounts and counters refresh when you return to the workspace.

Chapter 07 / 30 · Plans and payments

Choose a suitable plan

Read this chapter online

Your plan determines reserved numbers, included sends, team size and history retention. Compare your needs before confirming a quote.

What to compare

Count the WhatsApp numbers you need, active members and pending invitations. Estimate accepted sends over 30 days, then check history duration and storage.

The sending allowance is shared across the organisation’s numbers. Incoming messages and reading are not billed as sends. An extra number does not add message allowance.

The portal shows an estimated cost and may identify the lowest-cost plan for your needs. This helps you compare; it is not a guaranteed invoice.

Catalogue reference on 7 October 2026

Plan	30 days	Numbers	Sends	Members	History / storage	Extra send
Starter	29,900 XOF	1	10,000	3	7 days / 1 GB	3 XOF
Growth	79,900 XOF	3	40,000	10	30 days / 5 GB	2 XOF
Scale	199,900 XOF	10	100,000	25	90 days / 20 GB	1 XOF

Remember
These values describe the catalogue checked for this edition. Your existing contract may retain its own limits. The quote shown in your workspace governs your purchase.

Configure your choice

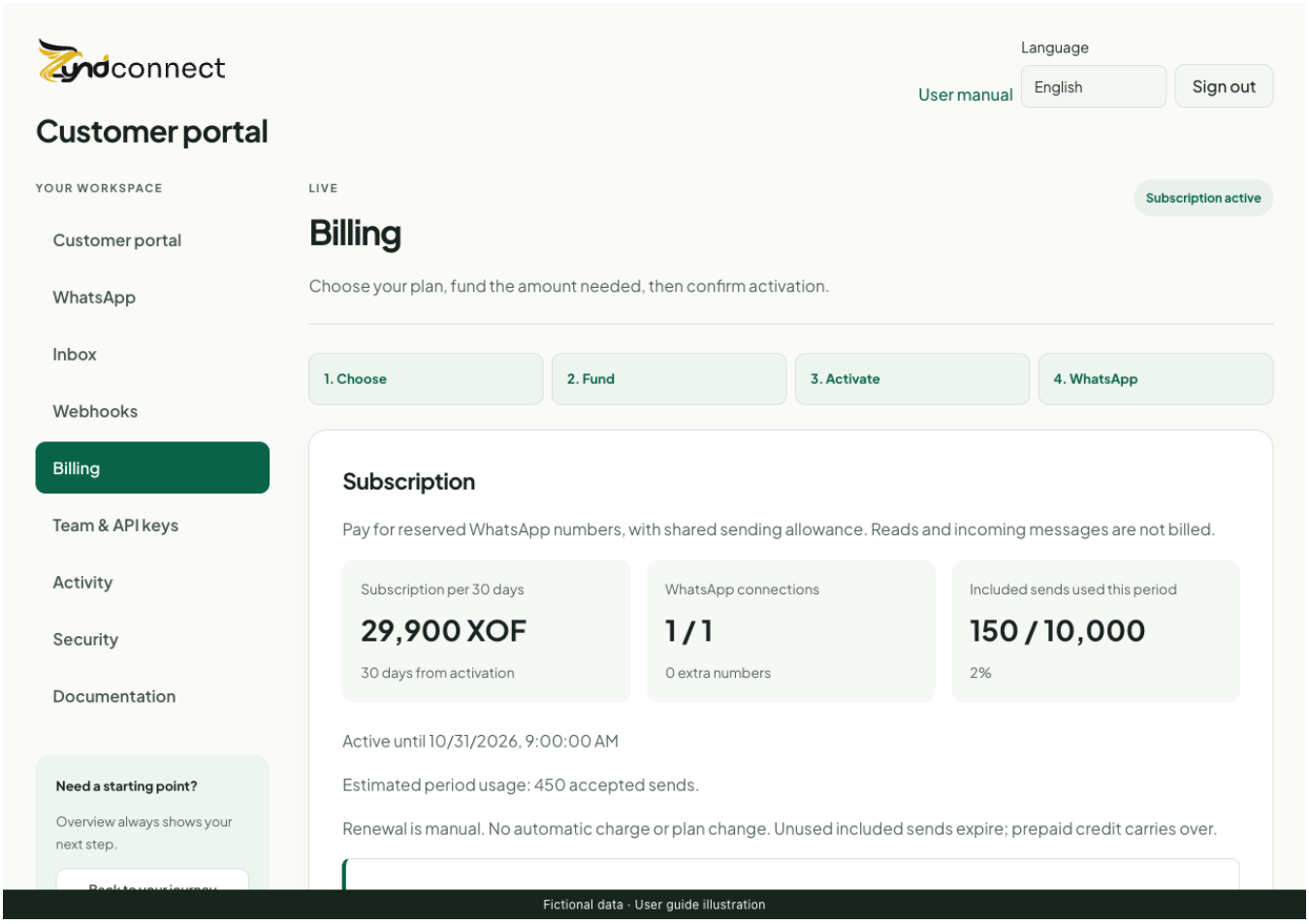
1. Open Billing and the plan comparison.
2. Select Configure this plan. Check the selected-plan indicator.
3. Enter the total reserved numbers. When extra numbers are offered, their price appears beside the field. This edition’s catalogue lists 24,900 XOF per extra number per period.
4. Select Review exact quote. Compare the debit now, period, allowance and terms before confirming.

Chapter 08 / 30 · Plans and payments

Top up your balance and verify payment

Read this chapter online

A top-up adds prepaid credit. You then confirm your plan separately. Offered methods depend on the provider's availability for your request.



Portal illustration with fictional data. No real message or payment.

Prepare and pay a top-up

1. In Billing, use Continue to payment from your quote or open Payments.
2. Check the amount. A top-up must be a whole number between 1,000 and 1,000,000 XOF. If the shortfall is below 1,000 XOF, remaining credit stays in your balance after activation.
3. Read the payment terms and tick acceptance. Prepare the link with Continue to payment.
4. Check the amount again and open Pay with the payment provider. The secure page opens in another tab.

5. Choose only a method actually offered on that page and follow its instructions. Portal indicators for card, mobile money or crypto do not guarantee availability for every payment.
6. Return to the portal. It checks payment when you return to the tab; you can also choose I have paid, check confirmation.
7. Wait for Paid and the credited balance. If the top-up funds your plan, select Continue to activation.

You paid but the status remains pending

Confirmation may take a moment. Check the same request, amount and identifier. Do not pay a second time just because the portal still says Pending.

In Payment history, View this payment retrieves a pending request. The portal checks its state before reopening the secure link. A closed link cannot accept a new payment.

To abandon a request, choose Cancel payment and read the confirmation. Cancellation does not prove that an already-made payment will be refunded. Check the final state.

When payments are unavailable

If the portal says payments are temporarily unavailable, it does not offer a new top-up link. History, verification and refund requests are separate.

You can compare plans and activate only if existing credit covers the quote. Without enough credit, wait for service to return or contact support. Do not try an old link outside the offered journey.

Chapter 09 / 30 · Plans and payments

Read a quote and activate your plan

Read this chapter online

Activation is an explicit commercial confirmation. The quote explains the exact change and its effect on your account.

Check the quote details

Field	Meaning
Debit now	Amount taken from prepaid balance when you confirm.
Subscription per 30 days	Recurring cost of the displayed configuration. This label does not authorise an automatic debit.
Included sends granted	Allowance added by the change. A mid-period change may be prorated.
Effective date / period end	When the limits start and when this period ends.
Quote valid until	Last moment to confirm this quote; an expired quote must be refreshed.
History / storage / terms	Applicable limits and terms version to read before acceptance.

Confirm without losing your place

1. Check the organisation, plan and total number count.
2. If an amount is missing, follow the funding step. Wait for credited balance, then return to the quote.
3. If the quote expired, choose Request a fresh quote. Compare the new values.
4. Read the terms version and tick acceptance.
5. Select Confirm quoted change once. If the response is uncertain, retry the same confirmation offered by the portal.
6. Check Subscription active, the end date and limits. You can then open WhatsApp to link a number.

If confirmation stays unavailable

Check accepted terms, validity date, available credit and your role. Only owners and billing members authorise these changes.

Reserved funds are not immediately available. Review the relevant operations or refunds. Do not make another top-up when a first payment still needs verification.

Chapter 10 / 30 · Plans and payments

Renew, add numbers and change plan

Read this chapter online

Each period lasts 30 days from activation. Renewal requires confirmation; the portal does not decide on a new purchase for you.

Renew before the end

1. Check the end date in Billing.
2. If Renew for the next 30 days is offered, open the quote and check the next period's dates.
3. Fund the balance if needed, accept terms and confirm. The next period is charged now.
4. Check Next period prepaid. It will start when the current period ends, without another debit at that time.
5. To cancel a prepaid period before it applies, use Cancel prepaid renewal and read the confirmation; the amount returns to prepaid balance.

After expiry or when changing plan

After expiry, sending pauses until renewal; messages already queued may resume after a renewed period. History remains subject to retention rules.

An immediate expansion may charge only the difference for the remaining period and grant prorated allowance. Already-used sends remain used.

A reduction may be prepared for the next renewal without an immediate removal. Reduce excess numbers or members before confirming the new limits. A plan labelled prepared is not necessarily paid.

Extra numbers are charged under the displayed offer and do not add included sends. To release a connection, use its removal as explained in the WhatsApp chapter; stopping it does not remove its reservation.

What carries over and what expires

Unused prepaid credit stays in the balance. Unused included sends expire at the end of the period. A new period does not automatically add the old unused allowance.

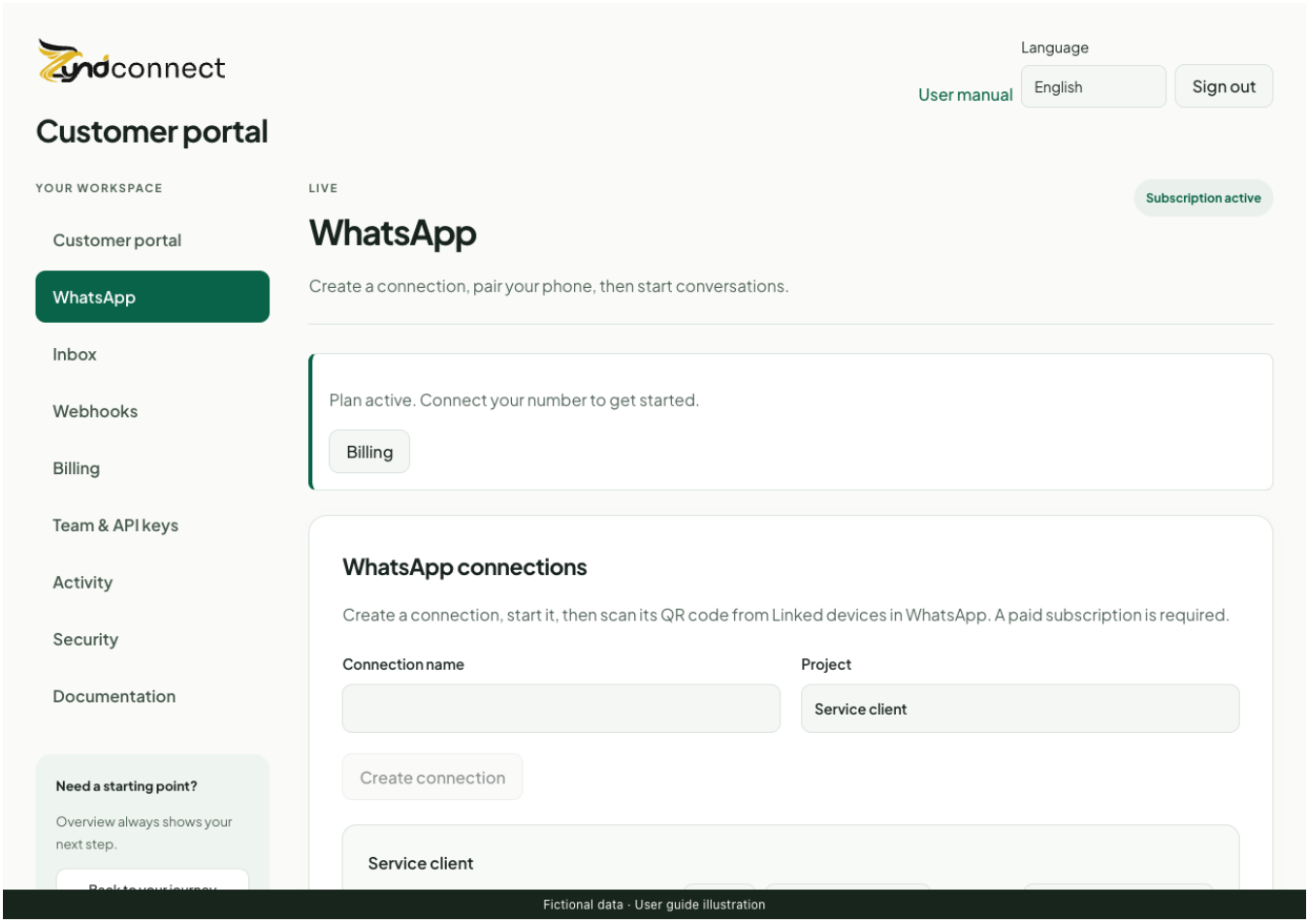
Before reducing history or storage, export data and download required attachments. Shorter retention may remove older items.

Chapter 11 / 30 · WhatsApp and conversations

Connect your WhatsApp number

Read this chapter online

First create a connection in your workspace, then link your phone. The connection must be ready before sending.



Portal illustration with fictional data. No real message or payment.

Create and start the connection

1. Check that the plan is active and a number slot is available. You must be an owner or developer.
2. Open WhatsApp. Give the connection a clear name such as Shop reception and choose the project.
3. Select Create connection. If the response is uncertain, use Retry on that same request; do not create several connections for one attempt.
4. Select Start on the connection card. Wait for the status change.

5. When the QR is available, choose Open QR. Keep it visible on another device if you scan it with your phone.

Link the phone

1. Open WhatsApp on the phone with the relevant number.
2. Open Linked devices in WhatsApp settings or its menu, then choose Link a device. Exact labels can vary by phone.
3. Scan the QR displayed in Zynd Connect and approve linking on your phone.
4. Return to the portal. Wait for Ready and check that the correct number appears.
5. If the QR expired or linking does not finish, refresh the state, open a current QR and try again.

Understand connection states

State	Useful action
Created / allocating	The connection exists or is being prepared. Use Resume if offered.
Initialising / authenticating	Startup or linking is in progress. Wait and refresh.
QR available	Open the QR and scan it with the phone.
Ready	The number is linked and can handle authorised sends.
Stopped / disconnected	Start the connection. A new QR may be needed if the device was unlinked.
Failed / unavailable / restricted	Read the reason. Open WhatsApp if an action is required; contact support if it persists.
Removing	Wait for removal to finish before creating a replacement.

Remember
The QR authorises linking of the number. Do not share it in a screenshot sent to support or another person.

Chapter 12 / 30 · WhatsApp and conversations

Stop, unlink and remove a connection

Read this chapter online

These actions have different effects. Choose the one that matches your need before confirming.

Choose the right action

Action	Effect
Stop	Pauses the connection. Retained data remains readable; the number remains configured and counts toward reserved slots.
Start	Restarts a stopped or disconnected connection. The portal may require a fresh QR depending on the WhatsApp state.
Unlink WhatsApp	Disconnects the linked device from WhatsApp. You need to link the phone again to resume.
Remove connection	Owner action that removes the connection and saved WhatsApp credentials. Recreate and link a number to replace it.

Before removing a number

1. Tell the team and the person managing integrations that use this number.
2. Check Activity and resolve queued or uncertain sends. Do not remove a number to try to force a sending outcome.
3. Download data and attachments you need to retain.
4. Select Remove connection, read the warning and confirm only the relevant connection.
5. Refresh the list. Before creating a replacement, check available slots and the active plan.

An unexpected disconnection

Read the displayed reason: linked device removed, phone disconnected, startup failed, WhatsApp action required or account restriction. First open WhatsApp on the phone and refresh the portal.

If an action is already in progress, wait for the new status before requesting another. If the account is restricted, reduce sending and contact support; creating more connections is not a solution.

Chapter 13 / 30 · WhatsApp and conversations

Send your first text message

Read this chapter online

The WhatsApp form starts an individual conversation from a ready number. Each request can be tracked in Activity.

Prepare and send

1. Open WhatsApp and select a connection with Ready status.
2. In Send a message, choose the sending number.
3. Enter the destination number with country code, using digits only. Do not add a +, spaces, hyphens or a conversation suffix.
4. Enter text up to 4,096 characters. Check the name, reference and recipient's permission.
5. Select Send once. Note the displayed operation ID and open Activity.
6. For a test, ask your contact to confirm receipt and reply. Find the conversation in Inbox.

Example text to adapt

Hello Awa, order CMD-1042 is confirmed. Delivery is planned tomorrow between 10:00 and 12:00 Bamako time. Reply here if you need a different time.

This is an example. Replace the details with an actually confirmed order. For the recipient field, convert a valid international number to digits only; use the number of the contact who agreed to the test.

If the send does not confirm

The portal may lock fields and offer Retry to recover the same request's outcome. Use that action before creating another send.

A queued request reserves an included send or the overage cost. WhatsApp acceptance triggers counting. It does not guarantee receipt by the recipient's phone or reading by the person.

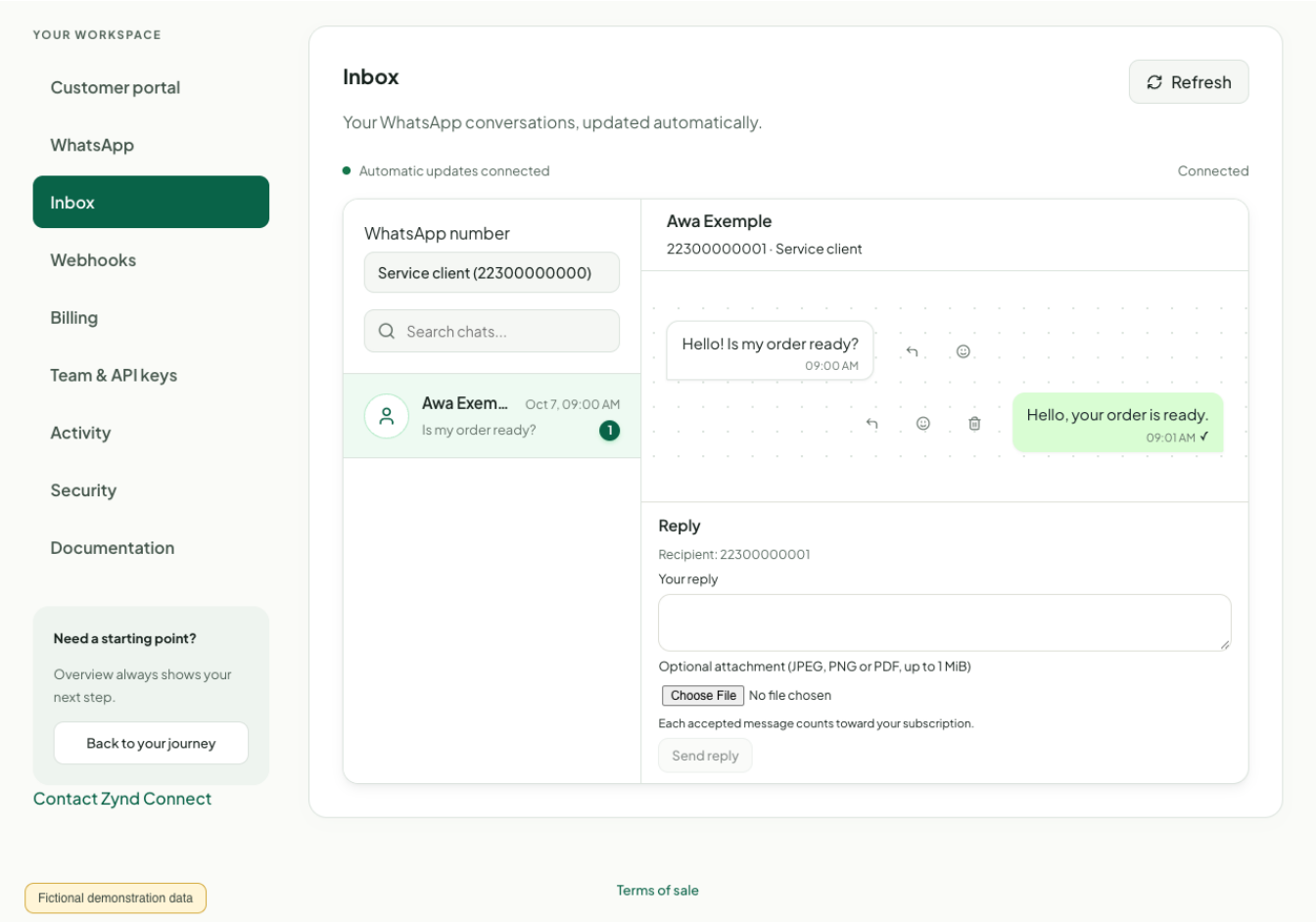
If the sending form is absent, check your role, Live mode, active plan and a ready connection. Read only users cannot send.

Chapter 14 / 30 · WhatsApp and conversations

Manage conversations and switch WhatsApp numbers

Read this chapter online

Read your conversations in an inbox that updates automatically. The number selector lets you work with each of your connections while keeping their messages separate.



Portal illustration with fictional data. No real message or payment.

Open the right conversation

1. Open Inbox. The first available number is selected automatically, with a ready connection given priority.
2. Under WhatsApp number, check the connection name and phone number. Choose another connection to view its conversations.
3. Search the loaded conversation list by name, number or message preview, then select a conversation. Badges show unread messages when WhatsApp provides that information.

4. Use Load more to see additional conversations. Scroll up within a conversation to load earlier messages when available.
5. New messages, delivery updates and conversation changes appear automatically. Automatic updates connected means your browser receives those updates; the WhatsApp number's connection status appears separately.
6. Refresh lets you reload when needed. On mobile, the back button opens the conversation list and number selector. Switching numbers clears the selected conversation to avoid replying to the wrong recipient.

Reply with text or a file

1. Choose an individual conversation or a group already present in your inbox. Check that the WhatsApp number is ready and your role allows sending.
2. Under Reply, check the displayed recipient. Enter your reply: up to 4,096 characters without a file.
3. To reply to a specific message, select Reply on its bubble. The quote appears above the form; Cancel reply removes it before sending.
4. To attach a file, choose a non-empty JPEG, PNG or PDF up to 1 MiB, or 1,048,576 bytes. The filename must not exceed 120 characters; the caption limit is 1,024 characters.
5. Check the selected file. Remove attachment lets you replace it before sending.
6. Select Send reply. You can send a file without text. The message follows the same counting rules as other sends.
7. Use Refresh status to inspect the result. If confirmation is uncertain, Retry the same request keeps the original destination and content.

Reactions, unread messages and deletion

When your role allows sending and the number is ready, the reaction button on a message offers several emojis. Choose one to react in the WhatsApp conversation. Received reactions appear with the message.

Opening a conversation with an authorized role can mark it as read in WhatsApp. A viewer can read messages without sending replies or read receipts from the portal.

To delete one of your sent messages, select its delete button and confirm. The request targets all participants and remains subject to WhatsApp's capabilities. This command cannot delete another participant's message. A removed message appears as deleted when its updated state is available.

A disconnected number keeps retained history readable. Replies and WhatsApp actions require a ready connection. If your connection access changes or your session expires, sign in again; an open screen is not proof of current access.

Download and find messages

A message with an available file offers Download attachment. Save items you need before retention expires. Account export does not replace downloading files.

Recorded history may remain readable when the phone is disconnected. This does not guarantee that all old phone conversations are imported. Your plan's history and storage rules apply.

An empty list may mean the wrong connection, no recorded messages yet or data removed under retention. A loading error needs a refresh; it does not necessarily mean there are no messages.

Chapter 15 / 30 · WhatsApp and conversations

Track sends and interpret statuses

Read this chapter online

Activity shows the latest 50 operations. Keep a request's identifier when you need to find it or ask for help.

Read progress

State	What it means
Queued	The request is waiting for processing. It is not delivery yet.
Sending	The service is attempting transmission. Avoid a second send.
Blocked	The request awaits a prerequisite such as an available connection or subscription. Read the context and restore that prerequisite.
Outcome uncertain	The service cannot conclude. Do not recreate the request: check the same operation and contact support if needed.
Accepted	WhatsApp accepted the send; allowance or credit is consumed. It is not proof of reading.
Confirmed failure	The send was not accepted; its reservation is released.
Cancelling	The cancellation request is being processed. Wait for the result.

Cancel a send when offered

1. Open Activity and find the identifier.
2. When cancellation is allowed, an owner or developer can choose Cancel send for a queued or blocked request.
3. Refresh and check the result. Do not treat the request as cancelled until confirmed.
4. Cancellation is not recall of a message already received. Accepted sends or uncertain outcomes do not offer the same journey.

Delivery and reading

In a conversation, message states may change as information arrives from WhatsApp. Treat them as the displayed state; do not automatically turn acceptance into delivery or delivery into reading.

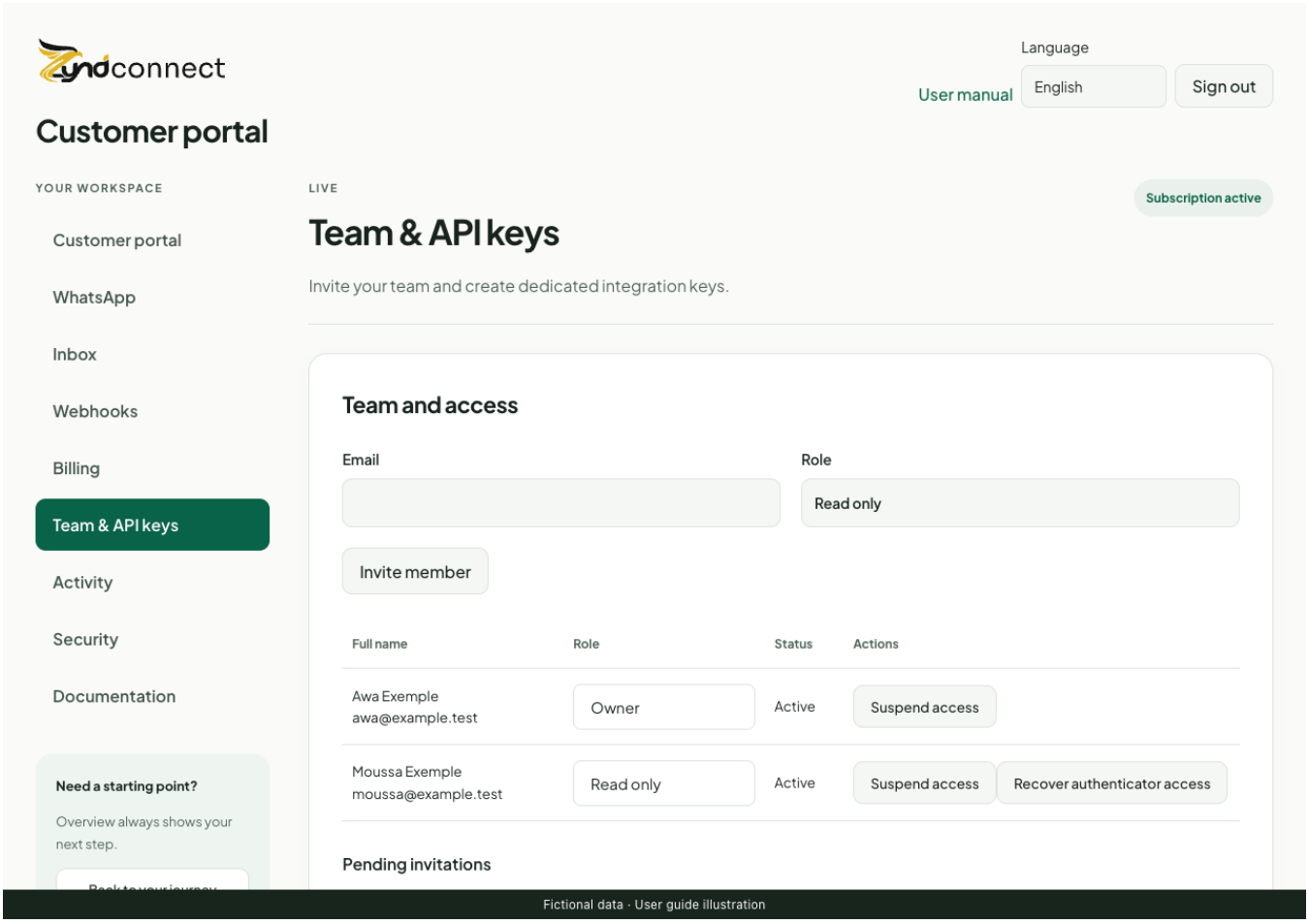
If the recipient reports no receipt, check the chosen number, date, connection and available states. Prefer checking with the recipient over immediately sending a duplicate.

Chapter 16 / 30 · Team and access

Invite and manage your team

Read this chapter online

The owner manages members in Team & API keys. Roles determine what each person can do.



Portal illustration with fictional data. No real message or payment.

Invite a person

1. Check your plan’s team limit and existing pending invitations.
2. Open Team & API keys and the Team section.
3. Enter the member’s work email and choose Read only, Billing, Developer or Owner for their job.
4. Select Invite. The portal confirms that the email is queued; this does not prove it was read.
5. Ask the person to open their email and follow the invitation. Then check that they appear among active members.

Change permissions and suspend access

The list shows name, email, role and status. Change the role using the selector on the relevant row, then check the result.

Suspend removes a member's access; Restore lets them resume under their role and organisation limits. Member suspension does not delete the whole organisation.

Pending invitations shows recipient, role, expiry and email delivery state. Revoke invalidates an unused invitation. To correct an address or role, revoke the old invitation and prepare the correct one.

Keep at least one active owner able to manage the organisation. Do not remove your only administrative access without arranging a replacement. Service protections may refuse that change.

Example division of responsibilities

A business lead receives Owner. The person handling payments receives Billing. The person connecting tools and handling conversations receives Developer. Someone who only needs to view receives Read only.

Do not share a single account among several employees. Individual access lets you remove one person without changing the entire team's password.

Chapter 17 / 30 · Team and access

Help a member who lost sign-in factors

Read this chapter online

Factor recovery is an owner action for another member. It should follow verification of the person's identity.

Choose the right recovery route

A forgotten password should first use Recover access. It does not remove the authenticator or passkeys.

If the authenticator is lost, the member can use an available recovery code or passkey. If no factor is usable, an owner can open Recover sign-in factors on the member's team row.

This action is not offered as self-recovery from your own member row. Another owner or support must help if your access is blocked.

Owner procedure

1. Verify the member's identity through an already-known channel; do not rely only on a message request.
2. Open Team, choose the correct email and Recover sign-in factors.

3. Enter a clear reason from 8 to 240 characters, your current password and the requested code if you use two-factor authentication.
4. Read the displayed explanation and confirm recovery. The member's factors and access are affected as described on that screen.
5. Ask the member to sign in again and set up protection again. Then check that the correct role is still assigned.

Chapter 18 / 30 · Team and access

Create and manage software access

Read this chapter online

An API key authorises software to act in your workspace. This chapter explains access management in the portal; programming instructions live in Documentation.

Create an appropriately limited key

1. The owner opens Team & API keys, then API keys.
2. Enter a recognisable name such as Shop order connector.
3. Choose the needed role and lifetime, from 1 to 90 days. The form initially uses 30 days.
4. Choose a project if access should cover only one activity. A billing key is not project-limited.
5. Enable permission restrictions if needed and tick only the expected actions. A restriction with no selected permission does not allow creation of a usable key.
6. Select Create access. Immediately copy the displayed key and save it securely.
7. Provide it only to the person or service configuring your integration, then select Hide. Check its name and expiry in the list.

Understand permissions without programming

Labels ending in read concern viewing. write concerns managing the stated objects. A messages:write permission authorises sending requests; it does not automatically grant team management.

Role and restrictions apply together. A project key cannot manage organisation-wide resources. Ask the person managing your tools for a precise list of required actions.

A key is not a member's password and does not replace their personal portal sign-in. Integration documentation is protected in the workspace for information related to your access.

Replace an expired or exposed key

1. Create a new key with the necessary permissions and an appropriate lifetime.
2. Ask the tool owner to replace the old key and verify operation.

3. Revoke the old key in the portal once replacement is confirmed; if exposed, remove compromised access without unnecessary delay.
4. If you did not save a key, create a new one: its full value cannot be retrieved from the list. Record expiry dates to plan replacement.

Chapter 19 / 30 · Connect your tools

Connect WhatsApp events to your tools

Read this chapter online

A webhook is a notification sent to a tool when an event occurs. You choose the connection, the address provided by the tool and useful events.

Create the connection to your tool

1. Ask the person managing your CRM or workflow for an HTTPS receiving address and the events they need. A company website address is not necessarily a receiving address.
2. Open Webhooks as an owner or developer. Choose the WhatsApp connection.
3. Paste the HTTPS address. Select at least one event; message.received is initially selected.
4. Select Create webhook. Immediately save the displayed secret and provide it to the tool owner to verify notification origin.
5. Trigger an agreed test event, such as a reply from your test contact. Check receipt in the tool, then review failures in the portal.

Available events

Displayed label	Meaning
message.received	An incoming message is received.
message.sent	An outgoing send is reported.
message.ack	A message acknowledgement state changes.
message.failed	A message failure is reported.
message.revoked	A message is revoked according to the received event.
message.edited	A message is edited.
message.reaction	A message reaction is received.
session.status	The connection state changes.
session.disconnected	The connection disconnects.

Pause, secret and failures

Pause and Resume disable or enable notification. This does not disconnect the WhatsApp number. Remove webhook deletes that notification link after confirmation.

Rotate secret displays a new value. Coordinate this with the tool owner so their tool uses the new secret. Never share it in a public support request.

Delivery failures shows events, dates, attempts, responses and identifiers of failed notifications. Give those references to the tool owner to fix their address or receiving service. An empty failure list alone does not prove that the tool processed the content.

A webhook notifies software; it does not spontaneously send a WhatsApp message to the customer. Your tool must organise any automatic response.

Chapter 20 / 30 · Plans and payments

Enable a renewal reminder

Read this chapter online

A renewal reminder is a personal email about plan expiry. It does not send WhatsApp reminders to your customers.

Set your preference

1. Sign in with your personal owner or billing account.
2. Open Billing and Renewal reminder.
3. Tick Email me a renewal reminder. The language used is the one selected when configuring the preference.
4. Check the enabled box and any latest state. Refresh reloads the state.
5. Untick it to stop that reminder. Each eligible person manages their own preference.

When to expect the email

The service prepares a reminder within 72 hours before expiry. No reminder is needed if the next period is already paid. The reminder does not authorise an automatic debit.

If email service is unavailable or the latest state reports failure, check the date in Billing. Accepted by the email server does not prove that the message reached your mailbox or was read.

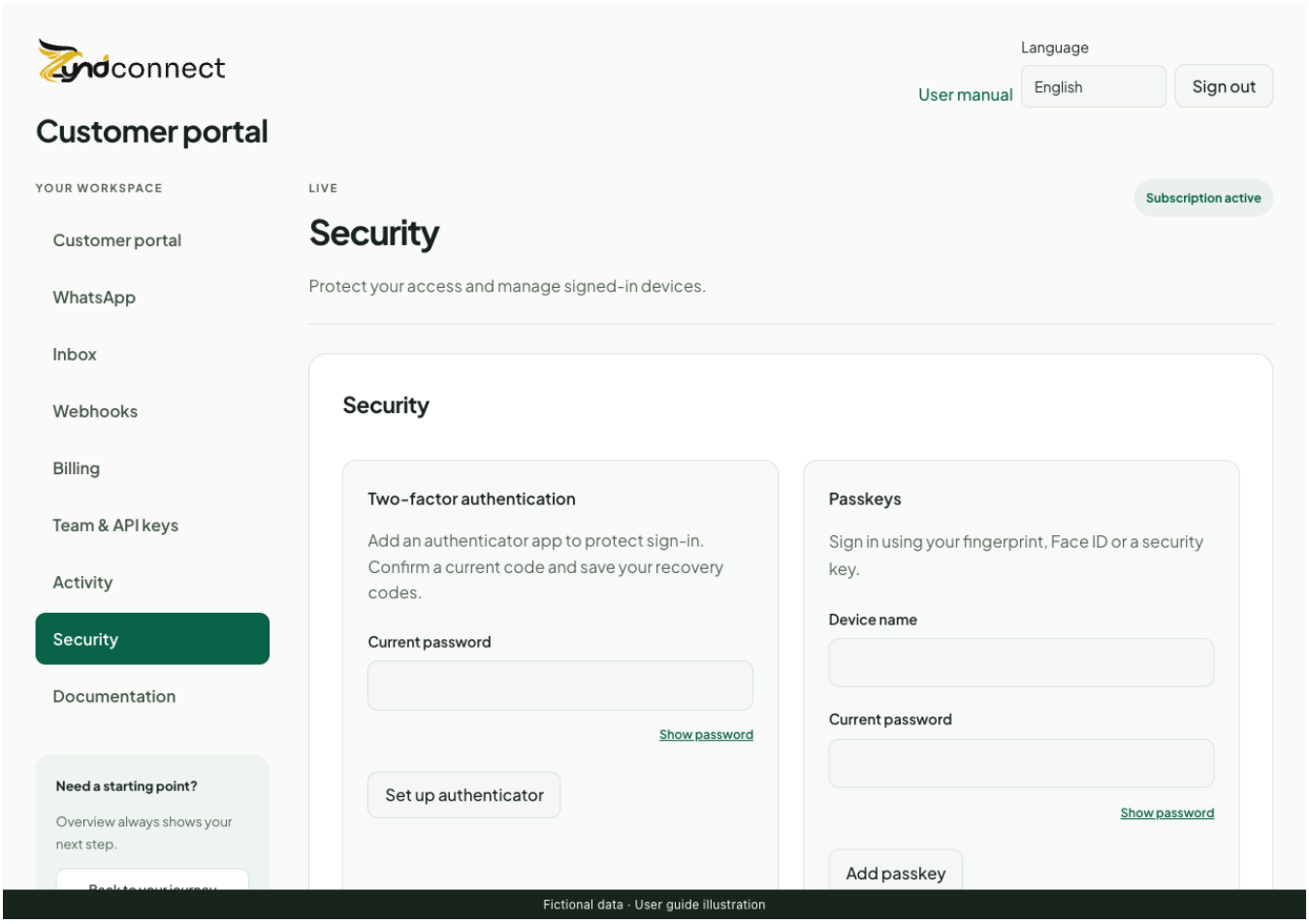
Keep a calendar reminder too. To organise appointment or delivery reminders over WhatsApp, use the business workflows chapter and arrange a suitable integration.

Chapter 21 / 30 · Security and data

Protect access: authenticator and passkeys

Read this chapter online

Security protects your personal account. WhatsApp settings are separate from devices used to sign in to the portal.



Portal illustration with fictional data. No real message or payment.

Add two-factor authentication

1. Open Security and the Authenticator card.
2. Enter your current password and select Set up authenticator.
3. In your authenticator app, add the account using the QR. Manual entry is offered if needed. Keep the secret private.
4. Enter the requested code before the displayed setup expiry and confirm. If the deadline passes, start setup again.

5. Check enabled status. Save recovery codes securely somewhere accessible even if you lose the phone.
6. Select I have saved the codes only after saving them. A used recovery code must not be reused.

Add a passkey

1. In Security, open Passkeys. Give the device a clear name.
2. Enter your current password and two-factor proof if requested.
3. Select Add passkey and follow the browser confirmation: fingerprint, Face ID, device code or security key as offered.
4. Check that the passkey appears with its name and date. Then test passkey sign-in.
5. If you cancel the prompt, try again when ready. If the browser is incompatible, use another available method.

Remove a factor without losing access

Before removing a passkey or disabling the authenticator, check that another method will let you sign in again. Read confirmations: some actions revoke sessions and sign you out.

Passkey removal requires the password and offered proof. Disabling the authenticator requires the password and code. Never share security QR codes, secrets, passwords or recovery codes with support.

Chapter 22 / 30 · Security and data

Change password and manage sessions

Read this chapter online

The sessions in Security represent browsers signed in to your account. They are not WhatsApp connections.

Change your password

1. Open Security and Change password.
2. Enter the current password and a new unique password with 12 to 128 characters.
3. Confirm. The portal signs you out after the change.
4. Sign in with the new password and required security factor. Review other authorised devices.

Revoke a browser session

1. In Active sessions, compare dates and Current session or Other session labels.
2. To remove a device you no longer authorise, select Revoke on its row.
3. Revoking the current session signs you out. For another session, refresh the list.
4. If you suspect an unknown login, revoke relevant sessions, change the password and review factors. Tell the owner if team access was also exposed.

Several tabs and devices

Signing out, switching organisation or changing password may invalidate data in another tab. If the portal asks you to sign in again, reload the tab and check the organisation before acting.

On a shared computer, use your personal account and select Sign out. Closing the window does not guarantee that the browser session is revoked.

Chapter 23 / 30 · Security and data

Retain data, export and request closure

Read this chapter online

Retention depends on your plan and storage. Plan ahead before lowering limits or closing the account.

Understand retention

Security shows the owner retention duration, used storage and contract limits. Older conversations and attachments are removed after the retention period or when storage fills up.

A message visible today is not guaranteed to stay available indefinitely. Download items needed for business records while available. An expired plan does not automatically cancel retention rules.

Export organisation data

1. The owner opens Security and Data lifecycle.
2. Select Export account and wait for download.
3. Save the JSON Lines file appropriately. It contains account data, team, the full financial journal and retained conversation text.
4. For attachments, return to Inbox and download each required file separately.
5. Check that the export and attachments are actually available before removing a connection, shortening history or closing the workspace.

Request closure

1. Export data and download needed attachments first.
2. Open Request closure. Read the immediate effect: access is suspended when requested and you can no longer sign in to export.
3. Enter a reason from 8 to 240 characters and confirm that you downloaded the export.
4. Confirm only when you are ready to suspend activity.
5. The Zynd Connect team then resolves remaining operations and funds before removing device access and history. A request is not proof of refund or completed final closure.

Chapter 24 / 30 · Plans and payments

Review payments, terms and refunds

Read this chapter online

Keep references that explain a money movement. A refund request must be distinguished from actual settlement.

Find payments and terms

In Billing, expand Payment history for dates, amounts and states. Available actions let you check or resume a request depending on its state and your role.

Your accepted terms lists versions recorded at signup and commercial confirmation. Download version retrieves the corresponding document; Refresh reloads the list.

The Terms link at the bottom of the portal shows current terms. Your accepted version and quote explain what applies to a particular operation.

Request refund review

1. As an owner or billing member, open Refunds under Payments.
2. Choose the relevant paid top-up. Only unused prepaid credit can be refunded, depending on available funds and applicable terms.
3. Select Check supported destinations. Use only a destination offered for this payment.
4. Enter the amount and a precise reason. If an address or identity is requested, check it before confirmation. Mobile money returns use the displayed original payment details.
5. Submit the request. Funds remain reserved during review and processing. A request does not mean money has already been returned.
6. If creation is uncertain, retry the saved request. If it still awaits review and the button is offered, Cancel withdraws it before provider submission.

Read the refund result

Awaiting review, provider processing or administrator verification means the case is still in progress. Refund settled is the displayed final state; check proof type and reference.

The portal distinguishes provider confirmation from operator-recorded or attested settlement. This helps you understand the available evidence.

Card-payment refunds require external manual settlement under the provider’s current contract. Do not assume that an alternative destination or a fixed deadline is guaranteed. Contact support with payment and refund identifiers.

Chapter 25 / 30 · Examples and practice

Understand and use a Sandbox workspace

Read this chapter online

A Sandbox workspace is a simulation environment. Its credit and operations do not represent a real payment or an actually sent WhatsApp message.

Recognise the mode

Check the Sandbox or Live label in the workspace and organisation selector. The portal shows a simulation notice for Sandbox.

Real-service WhatsApp, Inbox and Webhooks sections are not offered in this mode. Do not present a Sandbox screenshot as confirmed delivery or payment.

For real access, use the appropriate Live organisation or ask support what is available for your account. This manual does not describe an automatic conversion button.

Practice a reservation

1. In Overview, choose the project and number of test units.
2. An owner or developer can select Reserve test units. Review counters and the operation row.
3. To simulate success, select Confirm acceptance. To simulate failure, select Release reservation.
4. If confirmation is uncertain, Retry preserves the same request. New request creates a separate trial; use it only when you want that additional trial.
5. An owner or billing member can renew test credit using the offered Sandbox control. That control does not collect a payment.

Chapter 26 / 30 · Examples and practice

Use website resources and templates

Read this chapter online

Public resources help you prepare your business. They do not replace your customer workspace.

WhatsApp link and message copy

In Resources, the link generator accepts an international number with + and can add prefilled text. This differs from the portal's recipient field, which requires digits only.

Generate and Copy link lets you publish it on your site or share it. The generator does not send a message or verify the recipient account. Test the link before publishing.

The message-template file contains 12 texts for greetings, away replies, orders, deliveries, appointments and other exchanges. Replace every bracketed field and check the context before using it.

These texts are a writing library, not Meta-approved templates or scheduled messages. WhatsApp Business app auto-replies are configured separately.

Appointment tracker and tutorials

The appointment tracker is a CSV to import into Excel or Google Sheets. Fill in references, dates, times, time zones, owners, permission, reminders and next actions. The supplied row is fictional.

The tracker does not schedule a send in Zynd Connect. It organises your work; an integration is needed to trigger reminders automatically.

Industries, Use cases and Resources pages provide business examples. This manual describes current portal actions. Your workspace's Documentation section contains details for the person configuring software.

Chapter 27 / 30 · Examples and practice

Apply the platform to your business

Read this chapter online

Start with one useful workflow, test it with an agreed contact and then extend it. Define what your team does and what your software does.

Order and delivery

1. In your sales tool, check that the order is actually confirmed.
2. Send a short confirmation with reference and next step from WhatsApp or your integration.
3. Ask for the customer's availability only after the delivery slot is approved.
4. Read the reply in Inbox and update the order record.
5. If automated, sales software supplies the event and text; a webhook can return replies. Check processing in both tools.

Appointment and reminder

1. Check the appointment, number, permission and time zone.
2. Confirm the date and time in a clear message. Keep the reference in your tracker.
3. Organise the reminder in your calendar or business tool. The customer portal does not offer a native WhatsApp sending calendar.
4. Before reminding, check that the appointment is not cancelled or moved. Update the text if the time changed.
5. Handle the reply and stop unnecessary reminders in the responsible tool.

Support and teamwork

1. Choose the appropriate support number and project. Grant reply permissions only to relevant people.
2. In Inbox, open the request and check the conversation before replying.
3. Use a case reference and realistic time frame. Do not announce resolution before the business action is complete.
4. If several people reply, organise ownership with the team or CRM. Do not assume the portal has assignment queues, tags or routing rules when these controls are not visible.
5. Before escalating to Zynd Connect, remove unnecessary customer details and keep the useful operation identifier.

Commercial communication

Use the channel for messages your contacts expect. Record refusals in your business tool and ensure it stops triggering the relevant messages. A STOP message does not automatically create opt-out management in the portal.

Start small and inspect results. A contact list, message copy or webhook alone is not a ready-made campaign system.

Chapter 28 / 30 · Troubleshooting and reference

Solve common problems

Read this chapter online

Start by reading the displayed message, checking your organisation and locating the relevant request. An unavailable action does not always require a new signup.

Account, permissions and billing

Situation	First check
Missing email	Check address and spam, wait, then resend after the shown delay. Existing accounts should use recovery.
Expired or used link	Request a fresh link for signup, invitation or recovery as appropriate. Use the newest.
Wrong organisation	Select the right organisation before checking balance and connections.
Missing section or button	Check role and Live/Sandbox mode. Ask the owner for the needed permission.
Credit but inactive service	Open Billing, prepare the quote and confirm activation.
Paid top-up but no credit	Verify the same request and reference. Do not pay twice; contact support if it persists.
Cannot confirm quote	Check validity, terms, role and available amount; refresh an expired quote.
Payments suspended	Use only sufficient existing credit. Wait or contact support about a top-up.
Sign-in requested again	Your session may have been revoked or changed in another tab. Reload and sign in again.

WhatsApp, messages and tools

Situation	First check
Cannot scan QR	Open it on another screen, use Linked devices and a current QR.
No Ready status	Open WhatsApp on the phone, read the reason and refresh. Wait if state is already changing.
No slot for another number	Compare used numbers with the limit. A stopped number still counts; consider removal or an expansion quote.
Cannot send	Check ready connection, active plan, role, allowance/credit and digits-only recipient.
Uncertain outcome	Retry the same request and inspect Activity; do not create a duplicate send.
Accepted but not received	Check recipient, date and WhatsApp states. Acceptance is not delivery.
Empty inbox	Choose the right connection, refresh and check retention limits.
Group reply unavailable	Choose a group already present in Inbox, then check your sending permission, active subscription and number connection.
File rejected	Non-empty JPEG, PNG or PDF, up to 1 MiB; filename up to 120 characters and caption up to 1,024.
Webhook failure	Check connection, HTTPS address, events and active state; provide the failure reference to the tool owner.
Integration stopped working	Check key expiry, revocation, project and permissions with the owner. Also check connection state.
Historical file missing	Retention or storage limits may have removed it. Attachments need separate downloads.

Chapter 29 / 30 · Troubleshooting and reference

Glossary and quick answers

Read this chapter online

These explanations help you read the portal without technical background.

Portal terminology

Term	Explanation
Organisation	A business workspace with members, funds, projects and connections.
Project	Grouping that organises connections and can restrict software access.
Connection	A WhatsApp number linked to the service; different from a browser session.
Plan / subscription	Limits and price applying to a service period.
Top-up / prepaid balance	Credit added and then available for purchases and extra sends.
Allowance / included sends	Sends included in the period price.
Reservation	Credit or a unit held while a request's outcome is pending.
Overage	Extra send charged at your contract rate when included allowance is insufficient.
Operation	Tracked request with an identifier and state.
Webhook	An event notification to your software.
API key	Secret granting software access with permissions and expiry.
Passkey	Sign-in method confirmed by your device or a security key.
Retained history	Messages still available under plan time and storage limits.

Frequently asked questions

Question	Answer
Does signup charge me?	No. Confirming a quote authorises the purchase; signup alone does not debit credit.
Does a top-up activate WhatsApp?	No. Confirm the plan, link the phone and wait for Ready.
Is renewal automatic?	You must authorise a next period. An already-prepaid period starts at expiry without another debit.
Does unused allowance carry over?	No. It expires; unused prepaid credit stays available.
Do incoming messages consume included sends?	No. Accepted outgoing sends count; reading and incoming messages are not billed as sends.
Can I reply in a group from the customer portal?	Yes, for groups already present in your inbox, with an authorized role, active subscription and ready number. WhatsApp group rules still apply.
Does the renewal reminder contact my customers?	No. It sends you a personal email about expiry.
Are attachments included in export?	The export contains retained text; download attachments separately.
Do I need to program to reply?	Not for portal functions. An integration is needed for business automation.
Does stopping a number automatically reduce my bill?	No. Check reserved slots and the change quote. Stopping, removing and a commercial change are separate.

Chapter 30 / 30 · Troubleshooting and reference

Your routine and how to ask for help

Read this chapter online

A short regular review avoids blockers and gives you the right references when you need support.

Before starting the day

1. Check the selected organisation and plan end date.
2. Check that needed numbers are ready and counters allow planned sending.
3. Review expected conversations and blocked or uncertain operations.
4. Check that message business details are current before every send.

Weekly and before an expiry

1. Compare usage, overage, numbers and team needs.
2. Prepare renewal before expiry and check confirmation of the prepaid period.
3. Review invitations, suspended members, keys nearing expiry and browser sessions.
4. Download necessary data and files before their retention limit.
5. With your tool owner, inspect webhook failures and reply processing in your software.

Prepare a useful support request

Use Contact Zynd Connect in the workspace or the site's Contact section. State your language, organisation name, section, attempted action, date with time zone and expected result.

Include useful operation, payment, refund or connection identifiers, displayed state and checks already performed. For an integration, provide the key name without its value.

Attach a screenshot if helpful. Hide private messages, customer data, pairing QR codes, authentication QR codes, keys, secrets, passwords and recovery codes.

Example: "Demo Shop organisation, Billing, 7 October at 14:00 Bamako time. Top-up of 10,000 XOF, request [identifier]. I paid and verified the same request twice; it remains Pending. I have not paid a second time."