

Lia on WhatsApp: get your Meta account ready before onboarding.

Three steps to arrive at your onboarding call with everything in place: a business portfolio, your number on WhatsApp Business and your business verified. It is what keeps the call from stalling halfway through.

3 steps

You keep your number and the app

Start early: verification takes up to 14 business days



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For businesses getting ready to onboard Lia

RIA Systems LLC · <https://lia.im>

Lia works on **Meta's official WhatsApp platform**. For that, your business number has to sit inside a Meta **business portfolio**, formerly known as Business Manager. The portfolio is where your number, your business profile and your business verification live.

On onboarding day, **our team connects the number with you**, live, with your screen shared. What this guide asks is that you arrive with the portfolio created, the business verified, admin access working and the number ready on the phone.

Step	What it is	When
1. Create the business portfolio	At https://business.facebook.com , with the Facebook account of the person who will manage it	Before onboarding
2. Get the number ready and link it to the portfolio	WhatsApp Business active on the phone; the connection happens on the call	Before (prepare) and on the call (connect)
3. Verify the business	In the Security Center, with your business registration documents	Before onboarding

Submit the verification right after you create the portfolio: Meta's review takes up to 14 business days.

Lia's number must be on WhatsApp Business, active on the phone

The connection uses Meta's **coexistence** option: your business **keeps the same number and keeps the app on the phone**, and Lia starts answering through the official platform. A number with no WhatsApp at all, or only on regular WhatsApp, does not connect this way.

You do not need a new number. If you still want a dedicated SIM for Lia, install WhatsApp Business on it before onboarding and make sure it receives text messages or calls.

STEP 1

Create the business portfolio

On a computer

<https://business.facebook.com>

Before onboarding

First, check whether you already have one

On a computer, go to <https://business.facebook.com> and log in with the Facebook account of the person who will manage it. If your business portfolio opens, skip to step 2. Use that exact address: **work.meta.com** is a different product and will not work.

If the portfolio exists but sits in someone else's account (an agency, a marketing contractor, a partner), ask them to add you as an admin with full access. Nobody needs to share a password. Sort this out a few days ahead, never during the call.

If you don't have one yet, create it now

1. On a computer, go to <https://business.facebook.com> and log in with your Facebook account.
 2. In the top left corner, click the menu under **Home**, then click **Create a business portfolio**.
 3. Enter the portfolio name: your business's public name, with no special characters (for example, Smith Dental).
 4. Enter your first and last name and your **business email**. Meta uses this email to contact you; customers don't see it.
 5. Click **Create**.
 6. Open the email Meta sends you and **confirm your business email**. Until you do, you may not be able to add people to the portfolio.
- **Limit:** each person can create up to two business portfolios. If you have reached that limit, use a portfolio that already exists.
 - **Very new Facebook account:** Meta may block it. In that case, use an older account from a partner or a portfolio that already exists.
 - **One portfolio per asset:** a WhatsApp number belongs to a single portfolio. Choose your business's portfolio.

Recommended: a second admin

Meta recommends two people with full access. If one of their accounts runs into trouble, the other one can still log in and customer service doesn't stop.

1. In the portfolio, open **Settings** and click **People** in the left menu.
2. Click **Invite people** and enter the email the person uses on Facebook.
3. Click **Next**, give full access to the portfolio and click **Invite**.
4. The person opens the invitation email, logs in with Facebook and accepts the invitation.

If you don't see People, you don't have full access to the portfolio. Ask someone who does.

As soon as the portfolio is created, submit the business verification (step 3). Meta's review takes up to 14 business days and must be done before onboarding.

STEP 2

Get the number ready and link it to the portfolio

This step has two parts: what you prepare on the phone beforehand, and the connection, which we do together on the onboarding call.

Before the call: on the phone

On the business phone

Before onboarding

1. Keep the number on the **WhatsApp Business** app, not on regular WhatsApp, and **update the app** from your app store.
2. **If the number is on regular WhatsApp today:** install WhatsApp Business, tap **Agree and continue**, choose the number, tap **Continue** and **Allow**, enter the code you get by text message and set up your business profile. Your chats and media move over. Contacts saved only inside WhatsApp are lost, so save them to the phone's contacts first.
3. Make sure the SIM **receives text messages or calls**.
4. If the number is linked to **another customer service tool or CRM through a QR code**, or to **another portfolio** (an agency's, for example), tell us before the call. It has to be disconnected there first.
5. Plan for **the business phone to be in your hands** on the day, charged and online.

On the onboarding call: linking the number to the portfolio

On the computer and the phone

With our team, screen shared

1. On the computer, you log in with the **Facebook account of the portfolio admin**, in a Meta window we open from our dashboard.
2. You choose **your business portfolio**, the one that already exists, and check the business profile details (name, category and website).
3. A **QR code** appears on the screen. On the phone, open WhatsApp Business and scan it. Meta also sends a message to the same WhatsApp number with a link to it.
4. In the app, tap **Connect to the Business Platform**, confirm, and choose whether to share your chats.
5. Keep the app open for a few minutes while your contacts and the last 6 months of chats sync.

What stays the same

- **The number and the app are still yours.** You can reply from the phone whenever you want.
- Calls, catalog, labels and quick replies stay in the app.
- WhatsApp Web and your other devices can be linked again afterwards.

What changes in the app

- Turned off: broadcast lists (existing ones become read-only), disappearing messages, view once and live location.
- **WhatsApp for Windows** and for smartwatches stop working with this number. Use WhatsApp Web.
- Your customers get a WhatsApp notice about the change.

- **Open the app on the phone at least once every 14 days.** A phone left idle for too long drops the connection.
- **Don't move the number back to regular WhatsApp**, and tell us before you switch phones or reinstall the app. A phone change can put the account under review for up to 24 hours.
- **The name your customers see:** it must clearly relate to your business, such as the business name, or a person's name together with what the business does (for example, Dr. Smith Dentistry). It can't be just a generic term or a city, and it can't include "official" or "verified".

STEP 3

Verify the business

[On a computer](#)[Portfolio Security Center](#)[Before onboarding](#)

Verification proves to Meta that the portfolio belongs to your business. **It must be done before onboarding**, and it is the step that takes the longest: start right after you create the portfolio.

Without verification

- Messages your business **starts** (approved templates, such as reminders and notices) have a low limit of 250 people a day and can be blocked.
- The portfolio is limited in phone numbers and message templates.

With verification

- The limit for messages your business starts goes up to **2,000 people a day** and then rises on its own as you use it.
- The portfolio is ready for more numbers and more message templates.

How to do it

1. On a computer, with full access to the portfolio, open <https://business.facebook.com>, go to **Settings** and then **Security Center**.

2. Click **Start verification**. If the button doesn't appear, tell us before the call and send a screenshot of the Security Center.
3. Enter your **legal business name, address, phone number and website** exactly as they appear on your registration documents. The website must load and start with https.
4. If Meta can't find your business in the list, choose the option saying your business isn't listed and upload an official document.
5. Choose how to confirm the connection: email, phone call, text message, WhatsApp or your website's domain.
6. Click **Done**. The review takes up to 14 business days.

Is your verification still under review, or was it rejected?

Email support@lia.im before the date of your call with a screenshot of the Security Center. We'll work out the next step with you.

Document	What it proves
Certificate of incorporation, articles of organization or business registration	Your legal business name
Business license or a business tax document issued by the government	Your legal business name
Business bank statement	Your legal business name
Utility or phone bill showing the legal business name	Only your address and phone number

Documents in the local language are accepted. They can't be expired. Meta asks you to cover personal details that aren't needed, such as personal ID numbers.

- **Most common reasons for rejection:** a name that doesn't match the legal name on the document, a website that doesn't load or has no https, an expired document, and a utility bill without the legal business name.
- **Once verified, avoid changing** the legal name, phone number or website in the portfolio: Meta will ask you to verify again.
- **If you have your own website**, you can confirm through your domain, in the Domains section of the portfolio settings. Whoever manages your website can do it in a few minutes.

CHECKLIST

What to have ready on onboarding day



Business portfolio created

You can open your business portfolio at <https://business.facebook.com> on a computer.



You are an admin with full access

If the portfolio belongs to someone else (an agency, a partner), they have already added you before the call.



The portfolio admin's Facebook login working on the computer you'll use for the call

With the password and two-factor confirmation at hand. This is required: without it, the connection can't be made.



The business phone in your hands

WhatsApp Business updated and active, SIM receiving text messages or calls, battery charged and online.



The number is free

Disconnected from other tools linked by QR code and from other portfolios.



Business verified in the portfolio

Or the verification already submitted and under review. If it is under review or was rejected, tell us before the call.



Your legal business name, registration details and website, if you have one

For the business profile, matching what you used for verification.

COMMON QUESTIONS

Frequently asked questions

Do I need to buy a new number for Lia?

No. Lia uses the number your business already has, as long as it is on WhatsApp Business. You keep the number and the app on the phone.

Our portfolio was created by our marketing agency. What now?

Ask the agency to add you as an admin with full access. You don't need to switch portfolios or share a password.

Can I still reply from the phone once Lia is live?

Yes. Conversations show up in the app as usual, and you can reply whenever you want.

Verification is still under review and the call is coming up. What now?

Tell us before the call and send a screenshot of the Security Center. That is why it pays to submit verification right after creating the portfolio.

I use WhatsApp on my computer through the Windows app.

After the connection, use WhatsApp Web in your browser. The Windows app doesn't work with a connected number.



Stuck on a step?

Email a screenshot of the screen where you stopped to support@lia.im. With the screenshot, we can sort it out faster.

SOURCES

Where this information comes from

Screens and rules checked in Meta's and WhatsApp's documentation on **October 16, 2026**.

1. **Create a business portfolio (Meta Business Help Center).**
<https://www.facebook.com/business/help/1710077379203657>
2. **Add people to a business portfolio.**
<https://www.facebook.com/business/help/2169003770027706>
3. **Best practices to make a business portfolio more secure.**
<https://www.facebook.com/business/help/608572510632070>
4. **Connect WhatsApp Business to the Business Platform (WhatsApp Help Center).**
<https://faq.whatsapp.com/8122483904494954>
5. **Move your WhatsApp Messenger account to the WhatsApp Business app.**
<https://faq.whatsapp.com/3059780464322392>
6. **Coexistence: onboarding WhatsApp Business app users (Meta for Developers).**
<https://developers.facebook.com/documentation/business-messaging/whatsapp/embedded-signup/onboarding-business-app-users>
7. **Display name guidelines for the WhatsApp Business Platform.**
<https://www.facebook.com/business/help/757569725593362>
8. **Verify your business in Meta Business Suite.**
<https://www.facebook.com/business/help/2058515294227817>
9. **Upload official documents to verify your business.**
<https://www.facebook.com/business/help/159334372093366>
10. **Messaging limits (Meta for Developers).**
<https://developers.facebook.com/documentation/business-messaging/whatsapp/messaging-limits>

Meta changes its screens often and, in October 2026, is reorganizing the WhatsApp area inside the business portfolio. If a button shows a different name, look for the equivalent or email support@lia.im. Lia is a product of RIA Systems LLC.