INSTAGRAM TO WHATSAPP: MOVE A CONVERSATION WITH ONE TAP

Send a wa.me link with a message already typed inside Instagram's window, so the customer starts the WhatsApp chat themselves.

Updated October 17, 2026 · chatinflow.com/flows/ig-to-whatsapp

Instagram is where people find you; WhatsApp is often where they would rather talk. It is the app many customers check first, it keeps the conversation on their phone number, and an approved template can reach a customer there even after a quiet week, if they agreed to hear from you. Moving a chat by hand means typing your number, hoping they save it and starting again from "hi". The Instagram to WhatsApp flow does it in one message: inside Instagram's 24-hour window, it sends a wa.me link with a message already typed, and the person taps once to start the WhatsApp chat themselves. This guide sets it up step by step, explains when the move makes sense, and lists the rules that apply on both sides.

Key points

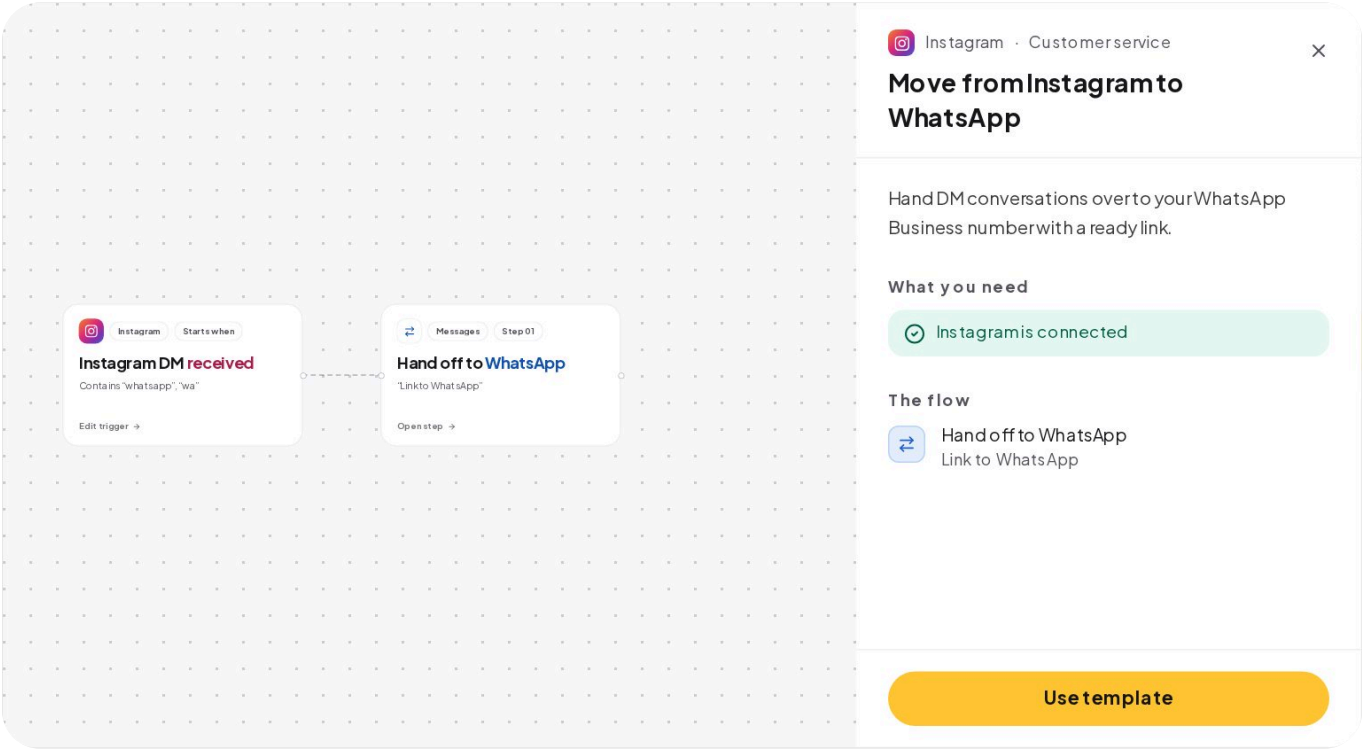
- The Hand off to WhatsApp step sends a wa.me link in the Instagram DM, with your WhatsApp number and a pre-filled message.
- The invite goes out only while Instagram's 24-hour window is open, which the flow checks before sending.
- The person taps the link and sends the first WhatsApp message themselves, so it is a conversation they chose.
- Your WhatsApp Business number runs on Meta's Cloud API, connected with its phone number ID and a permanent access token.
- WhatsApp is part of the paid plans; the Free plan connects one channel other than WhatsApp.

HOW THE FLOW WORKS

Step	What happens	Built with
1. The Instagram message	A keyword, a button or a question	A DM trigger or a button
2. The window check	The flow confirms the 24-hour window is open	A condition, or the step's own check
3. The invite	A DM with the wa.me link and a short reason to switch	Hand off to WhatsApp
4. The tap	The person opens WhatsApp with your message already typed	WhatsApp on their phone
5. Their first message	They press send, and the WhatsApp conversation starts	WhatsApp

STEP 1: START FROM THE TEMPLATE

Open **Automations** and search the gallery for "WhatsApp" or "hand". **Move from Instagram to WhatsApp** hands DM conversations over to your WhatsApp Business number with a ready link.

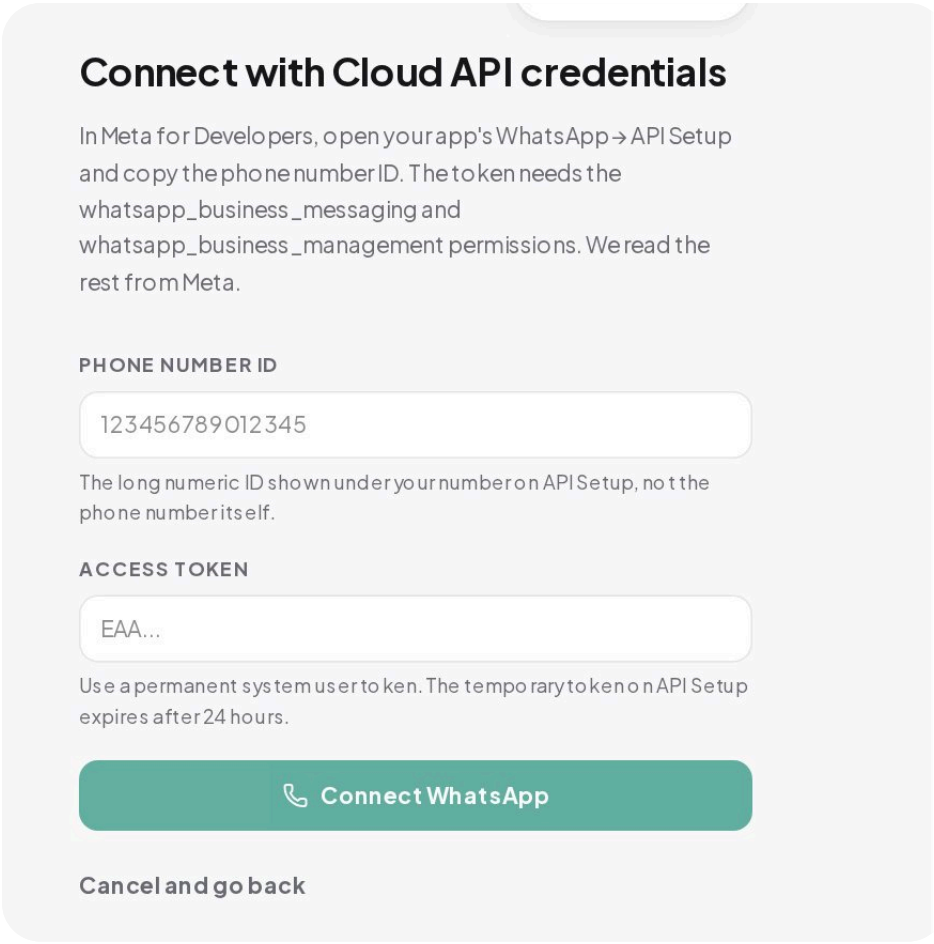


Move from Instagram to WhatsApp: one step that sends the link.

Press **Use template** and it opens as a draft. Decide what starts it before you publish: a keyword such as WHATSAPP, a button in your welcome message, or the end of a longer flow.

STEP 2: CONNECT YOUR WHATSAPP NUMBER

The link needs a number to point to. Open **Channels** and choose WhatsApp. The connect screen asks for two values from Meta.



Two values from Meta: the phone number ID and a permanent access token.

- **Phone number ID**, the long numeric ID under your number in Meta for Developers, not the phone number itself.
- **A permanent access token** from a system user, with the whatsapp_business_messaging and whatsapp_business_management permissions. The temporary token on API Setup expires after 24 hours.

The Hand off to WhatsApp step uses the workspace's primary WhatsApp connection unless you enter another number in E.164 format, such as +44 20 7946 0000 written without spaces.

STEP 3: WRITE THE INVITE

The step has three fields:

- **The WhatsApp number**, optional, for a number other than your primary connection.
- **The pre-filled WhatsApp text**, the message that appears in their WhatsApp composer when they open the link, such as "Hi! I'd like the price list for the spring collection."

- **The DM body**, the Instagram message that carries the link, with `{{ wa_link }}` where the link goes.

A good invite gives a reason to switch, in one or two sentences:

> "Easier to send you the full price list and photos on WhatsApp. Tap here and just press send: {{ wa_link }}"

> "We confirm bookings on WhatsApp so you get the reminder on your phone. Tap to continue: {{ wa_link }}"

The pre-filled text matters more than it looks. It tells your team on WhatsApp what the person came for, before anyone has to ask.

STEP 4: SEND IT ONLY INSIDE THE WINDOW

On Instagram, a business can message a person freely only within 24 hours of their last message. The invite is a message, so it follows the same rule: put it right after the person wrote, as an answer to their keyword or their button. A flow that tries to send the invite after the window has closed does not reach them.

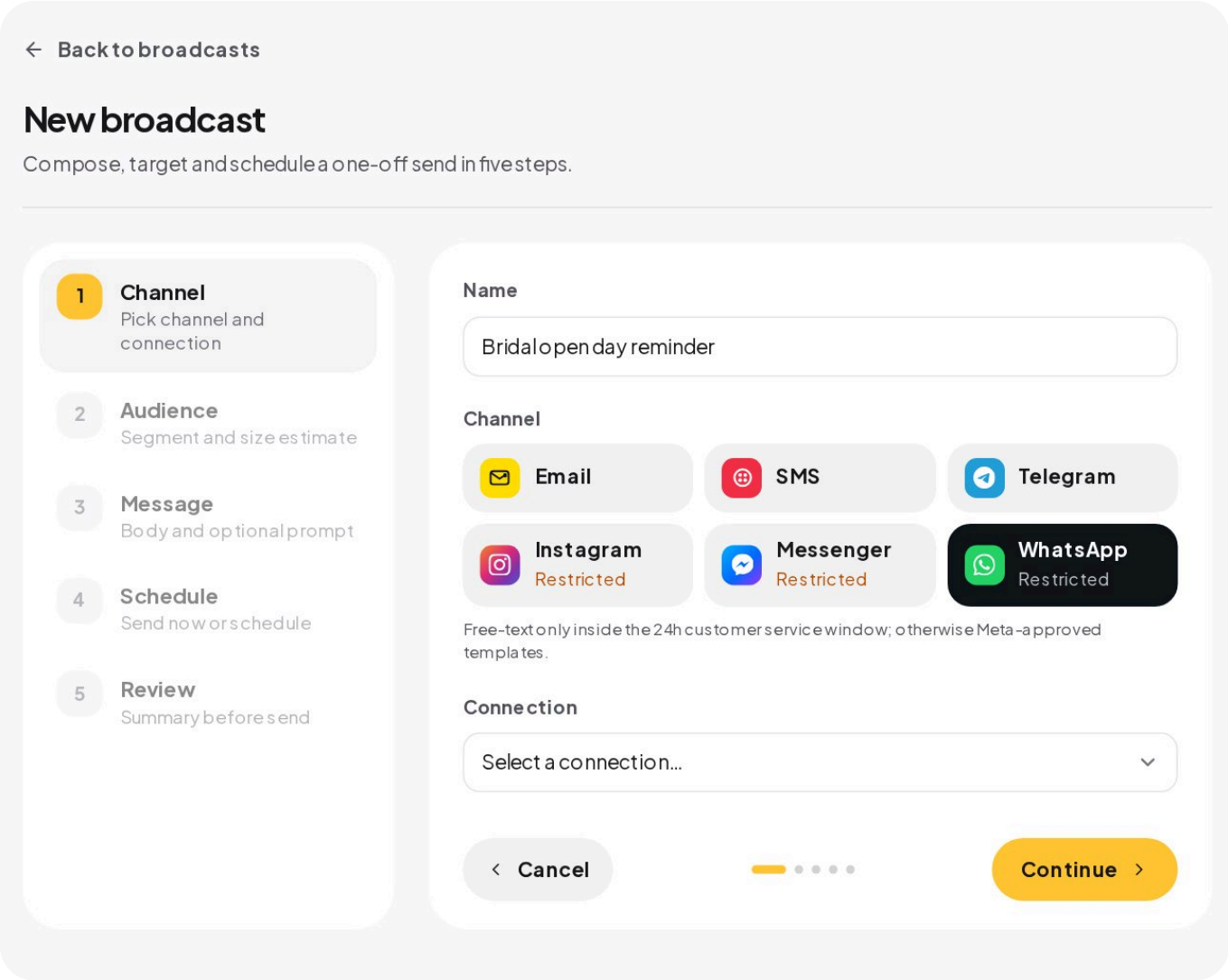
Two common placements:

1. **As an answer.** Someone sends WHATSAPP or taps "Continue on WhatsApp" in your welcome; the invite goes out at once.
2. **At the end of a question.** After a quote, a size question or a booking request, offer the switch as a button: "Want this on WhatsApp?" The tap is a new message, so the window is open again.

STEP 5: KNOW WHAT CHANGES ON WHATSAPP

Once the person writes to your WhatsApp number, WhatsApp's own rules apply:

- **24 hours to reply freely.** After the customer's last message, any message can be sent for 24 hours.
- **Templates after that.** To write again later, a template Meta has approved is the way back in, and only to people who agreed to hear from you.
- **Templates are written in ChatinFlow.** In the message step of a WhatsApp broadcast, press New template, write it with variables or buttons, and send it to Meta for review.



WhatsApp's rule appears under the channel before you write a word.

STEP 6: DECIDE WHO SHOULD MOVE

Not every conversation belongs on WhatsApp. Moving makes sense when:

- **The conversation will take days**, such as a custom order, a booking with a deposit or an after-sales question.
- **The customer asked for it**, or is clearly more comfortable there.
- **You will need to reach them later**, with an order update or a reminder, which WhatsApp templates allow after the window.

Keep the conversation on Instagram when the answer is quick, such as opening hours or a price, or when the person is browsing your content and a switch would interrupt them. When in doubt, offer the switch as a choice, never as the only way forward.

THE MESSENGER VERSION

The same step works in Messenger chats with your Facebook Page. A common use is a Page that gets order questions from older customers who prefer WhatsApp: a menu button "Continue on WhatsApp" in the Messenger welcome sends the link, with the pre-filled text "Order question from Facebook". The 24-hour window works the same way on Messenger, so the button has to be tapped inside it, which it always is when the person just tapped it.

PREPARING YOUR WHATSAPP SIDE

Before you send people over, make the first impression on WhatsApp a good one:

- **Your business profile** in WhatsApp Manager: the name, the photo, the hours and the address customers see.
- **A clear first answer.** Whoever answers your WhatsApp number should know what the pre-filled texts mean, so "Custom table quote" gets a quote, not "how can I help?".
- **Consent wording.** If you plan to send order updates or reminders later, say so in the first reply, and keep a record that the customer agreed.
- **Templates ready.** Write the order update or reminder template in ChatinFlow and send it for review before you need it; Meta usually reviews within minutes, at times within a day.

MEASURING THE SWITCH

Add a **Tag contact** step right before the invite, such as moved-to-whatsapp, so you can see in Audience how many people got the link from each flow. The automation's **Activity** tab lists every run and where it stopped, which tells you whether people reach the invite at all or drop off earlier in the questions. Compare two invites by putting them in two flows on two keywords, and keep the one that sends more people over.

A WORKED EXAMPLE: A CUSTOM FURNITURE MAKER

A furniture maker gets Instagram DMs about custom tables. Quotes take a few days, with photos and measurements going back and forth.

1. **The keyword.** A story says "Send TABLE for a custom quote". The DM flow asks two questions with buttons: the size of the room and the wood.
2. **The switch.** The next message says "I'll need a few photos of your room. Easier on WhatsApp: tap here and press send" with the wa.me link, and the pre-filled text reads "Custom table quote: oak, dining room".
3. **The tap.** The customer opens WhatsApp with the text ready and presses send.
4. **Later.** When the table is ready a week later, the maker can send an approved template to the customer, who agreed to hear about the order.

The customer never types a phone number, and the maker knows from the first WhatsApp message what the quote is about.

WRITING THE INVITE WELL

- **Give a reason.** "Easier to send photos" or "so you get the reminder" beats "message us on WhatsApp".
- **Make the tap the only effort.** The pre-filled text means they just press send.
- **Say what happens next.** "We reply within the hour on weekdays" sets the expectation.
- **Do not repeat the question they already answered.** The pre-filled text carries it over.

WHAT CUSTOMERS ASK BEFORE THEY SWITCH

Some people hesitate before moving to another app. Answer the three usual worries in the invite or the next message:

- **"Will you spam me?"** Say what you will send: the quote, the photos, the order update.
- **"Do I have to give you my number?"** Tapping the link and pressing send does that, and it is their choice; say so plainly.
- **"Can I stay here instead?"** Yes. Offer a Stay on Instagram button next to the link, and keep answering where they are.

People who choose to switch are the ones who want the longer conversation, which is exactly who belongs on WhatsApp.

RULES ON BOTH SIDES, IN PLAIN TERMS

	Instagram	WhatsApp
Who writes first	The person, with a comment or a DM	The person, by tapping your link and pressing send
Free replies	24 hours after their last message	24 hours after their last message
After the window	No message until they write again	An approved template, to people who opted in
Account	A professional account	A WhatsApp Business number on the Cloud API

COMMON MISTAKES

- **Sending the invite after the window.** It does not reach them; send it as an answer to their message.
- **No pre-filled text.** The first WhatsApp message then says "hi", and your team has to ask again.
- **Moving every chat.** A quick answer belongs where the question was asked.
- **A personal number.** Use a WhatsApp Business number on the Cloud API, not a phone on a desk.
- **Templates without consent.** Message people later only if they agreed to hear from you.

TERMS IN THIS GUIDE

- **wa.me link.** WhatsApp's link format that opens a chat with a number, optionally with a message already typed.
- **Pre-filled text.** The message that appears in the WhatsApp composer when someone opens your link.
- **Hand off to WhatsApp.** The flow step that sends the wa.me link in the current Instagram DM.
- **24-hour window.** The time after a person's last message when a business can reply freely.
- **Template.** A WhatsApp message Meta approves in advance, used outside the window.
- **E.164.** The international phone number format, with the country code and no spaces.
- **Cloud API.** Meta's official interface to the WhatsApp Business Platform, which ChatinFlow connects to.

QUICK ANSWERS

Can I send the link from Messenger too?

Yes. The Hand off to WhatsApp step works in Instagram and Messenger chats, inside each channel's 24-hour window.

Does the person need WhatsApp installed?

Yes. On a phone, the link opens WhatsApp; without it, WhatsApp's own page offers to install the app.

Can I use a different number per flow?

Yes. Enter the number in the step, in E.164 format; leave it empty to use your primary WhatsApp connection.

SOURCES

- **About the WhatsApp Business Platform**, Meta for Developers, on the Cloud API.
- **Get opt-in for WhatsApp**, Meta for Developers, on consent before business-initiated messages.
- **Messenger Platform and IG Messaging API policy**, Meta for Developers, on the 24-hour window on Instagram.

DO IT IN SECONDS, FREE

chatinflow.com/flows/ig-to-whatsapp