

Zoho Integration User Guide

Introduction

The SMSGlobal SMS Integration is an integration with the Zoho CRM platform. This Integration enables Zoho admins to configure automated SMS notifications to the administrator and customers for important order status updates, and also allows sending bulk SMS messages to customers. The Integration is free, but a SMSGlobal MXT account is required to send messages. Signup with our service is free as well, and you pay only for the SMS messages. The Integration offers great flexibility, in sending individual SMS or bulk SMS messages to various groups.

SMSGlobal Benefits

- Competitive Mass and Bulk SMS Pricing
- Wholesale pricing
- 99.9% On-net network redundancy
- 99.9% Uptime availability
- Enterprise scalability
- API flexibility
- No setup fees - No contracts - No catches

Integration Compatibility

Zoho Professional and Enterprise Edition.

Features

- Send bulk messages to your Contacts and Leads using preconfigured messages.
- Send Individual / Bulk custom messages to your Contacts, Leads and Accounts.
- View SMS log history.
- Custom Send Message.
- Send SMS when a new lead is created
- Send SMS when a new contact is created.
- Send SMS when a new account is created.

Installation Steps

1. Log in Zoho CRM using your admin login
2. Go to Zoho Marketplace and search for SMSGlobal extension. (link: <https://marketplace.zoho.com/crm/smsglobal>)
3. Click install
4. Once installed then set up the following extension settings:

SMS Content: SMS content to send to your customers.

User name: Your SMSGlobal account API master key.

Password: Your SMSGlobal account API master password.

Sender ID: A custom word or virtual number. Leave it blank to use SMSGlobal's sharedpool of virtual numbers.

Enable Lead SMS: Set up the value of this field as '1' to automatically send welcome SMS to your new added Lead.

Welcome Lead Message: Welcome message content for new Lead.

Enable Contact SMS: Set up the value of this field as '1' to automatically send welcome SMS to your new added Contact.

Welcome Contact Message: Welcome message content for new Contact.

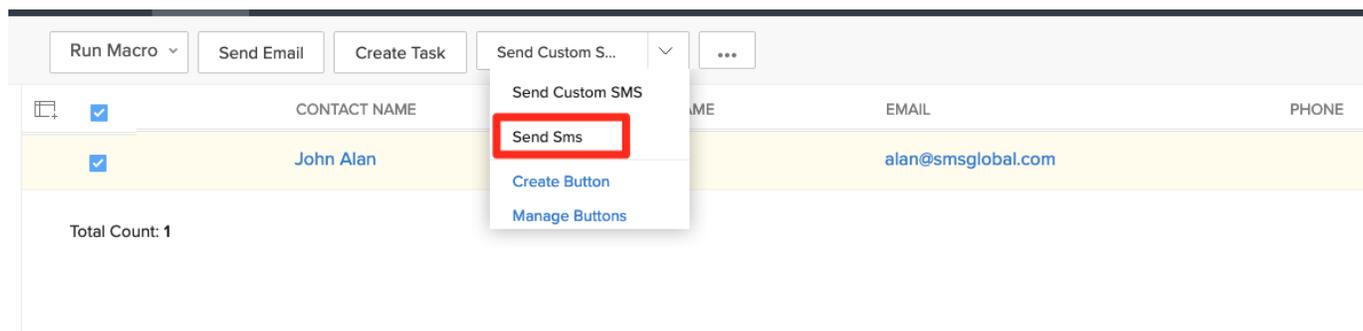
Enable Account SMS: Set up the value of this field as '1' to automatically send welcome SMS to your new added Account.

Welcome Account Message: Welcome message content for new Account.

Bulk Customised Messages (Contacts/Leads/Accounts)

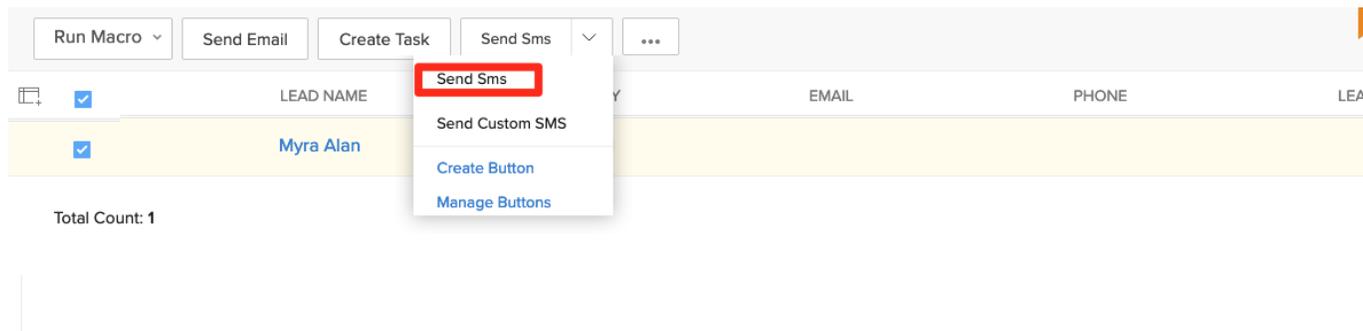
Contacts

- 1) Click Contacts and from the contact list select the contacts by clicking on the check boxes.
- 2) Click Send SMS.



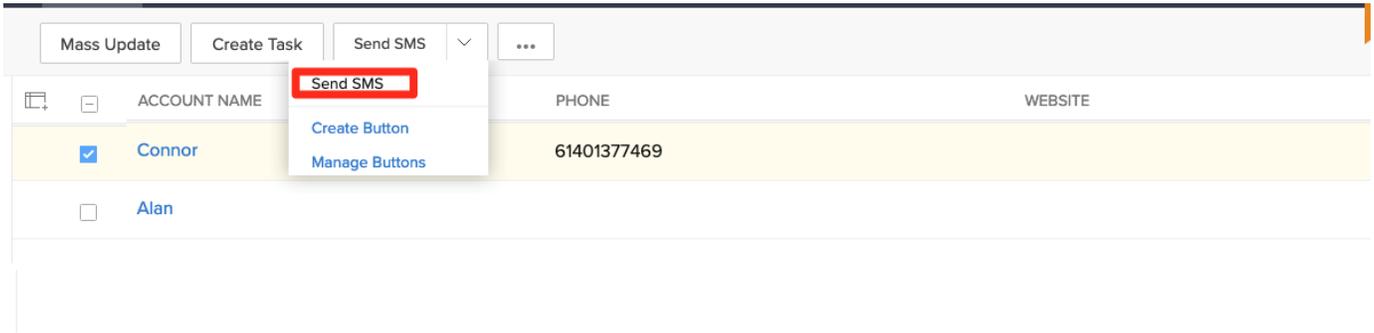
Leads

- 1) Click Leads and from the leads list select the leads by clicking on the check boxes.
- 2) Click Send SMS.



Accounts

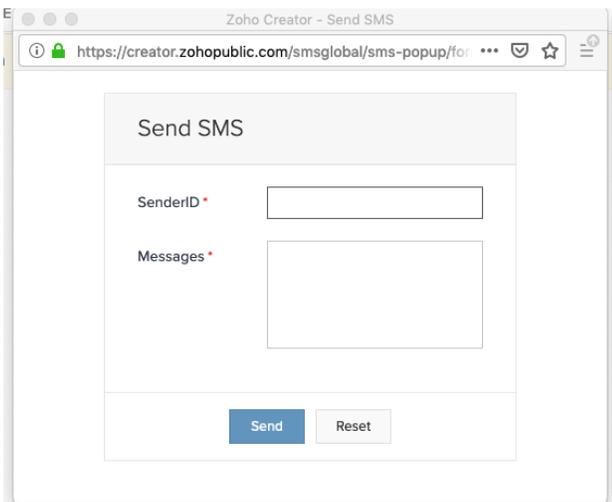
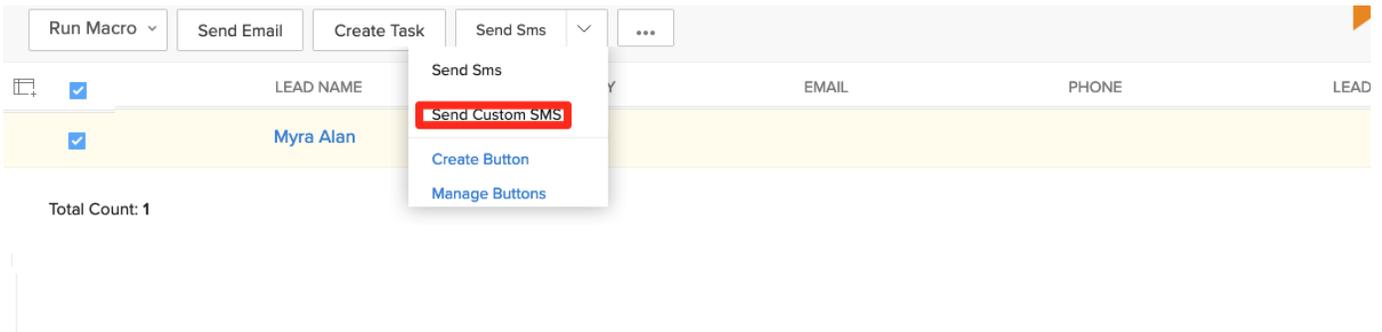
- 1) Click Accounts and from the accounts list select the accounts by clicking on the check boxes.
- 2) Click Send SMS. (Account uses Phone Field to send SMS, use country code with number)



Send Message Custom Messages

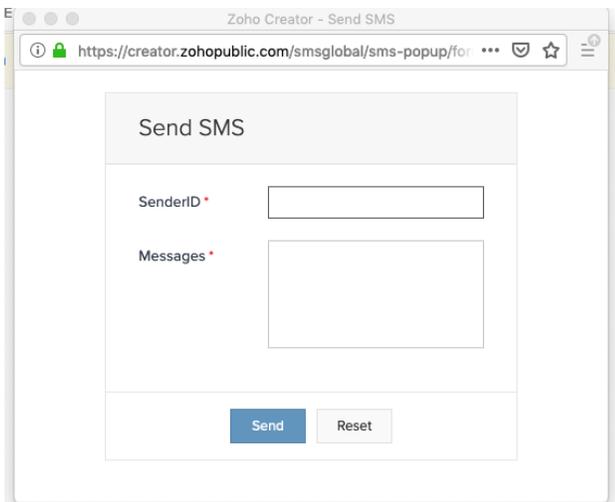
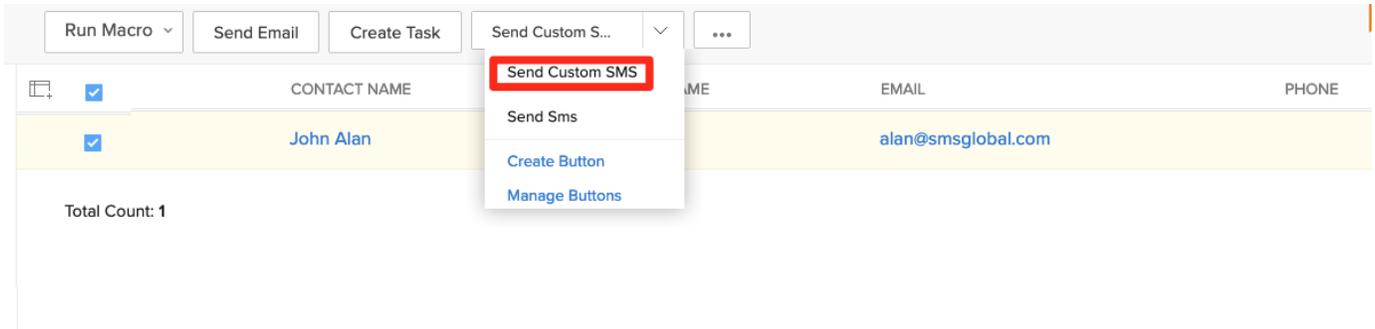
Leads

- 1) Click Leads and from the leads list select the leads by clicking on the check boxes.
- 2) Click Send Custom SMS
- 3) Fill in the Sender ID, Message and click Send.



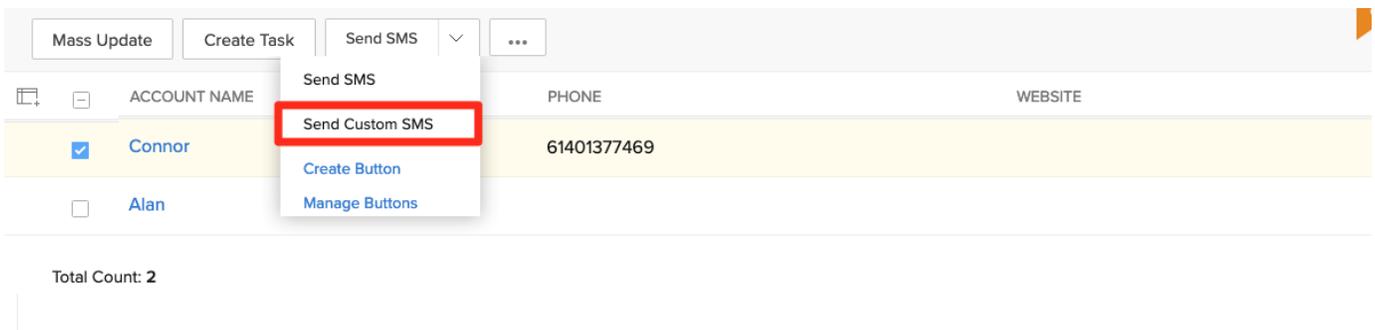
Contacts

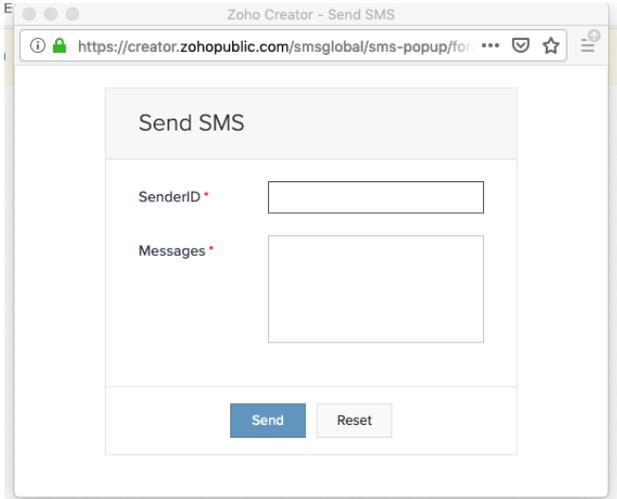
- 1) Click Contacts and from the contacts list select the contacts by clicking on the check boxes.
- 2) Click Send Custom SMS
- 3) Fill in the Sender ID, Message and click Send.



Accounts

- 1) Click Accounts and from the accounts list select the accounts by clicking on the check boxes.
- 2) Click Send Custom SMS
- 3) Fill in the Sender ID, Message and click Send.





SMS Log History

Click SMSlog from top Menu. This will give all the history of SMS requests sent to SMSGlobal. (excludes all the custom messages)

	SMSLOG NAME	EMAIL	OWNER
<input type="checkbox"/>	Account Send SMS		Marketing

Total Count: 1

Total Count: 2