
SMS/WhatsApp Extension Setup guide



MAY 202

ValueFirst Digital Media
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Purpose

ValueFirst Digital developed a marketplace application to cater those customers who are using Zoho CRM and using ValueFirst SMS and WhatsApp API to send messages to their customers.

Key Features

- Single WhatsApp, Multiple account of SMS and single account of WhatsApp can be configured
- Facility to manage SMS and WhatsApp templates
- WhatsApp templates can be fetched on single click
- You can choose the phone/mobile field while sending SMS/WhatsApp messages
- You can send SMS and WhatsApp messages from Leads, Contacts and Accounts modules.
- WhatsApp templates support text and rich media.
- Bulk and single message send facility, also you can send trigger-based notification using Zoho workflows
- Delivery report is available for SMS and WhatsApp channel in SMS/WhatsApp history report.
- WhatsApp inbound messages are visible in user activity.

Pre-requisites

- XML account for SMS and WhatsApp channel API
- IP whitelisting against XML account at ValueFirst side

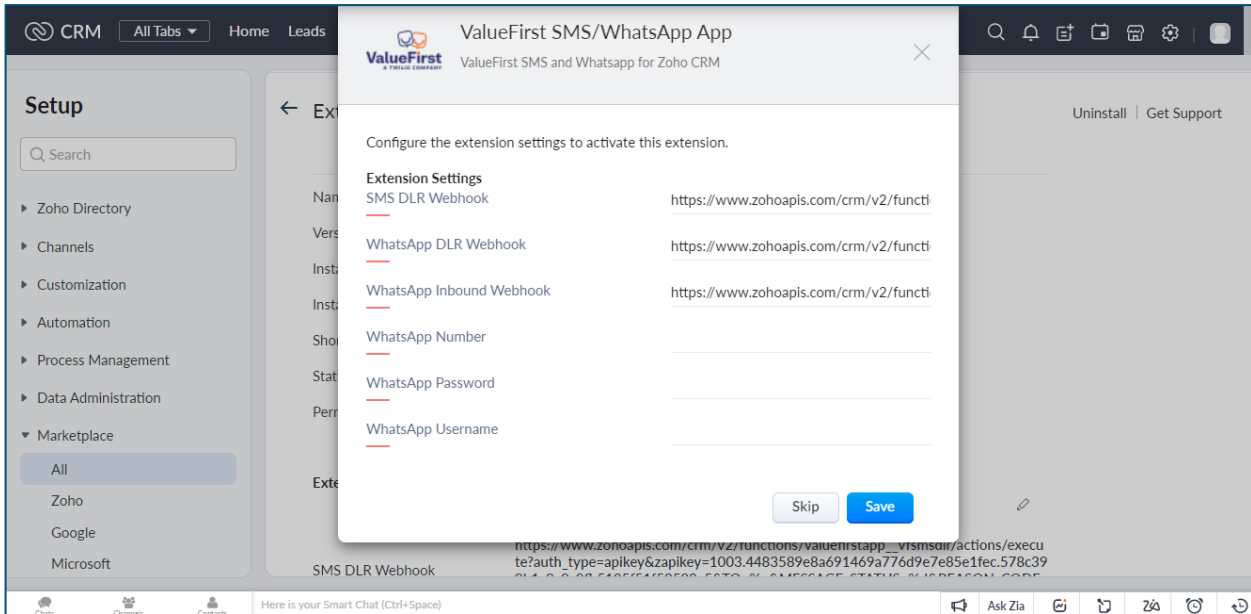
Installation

- Install “ValueFirst for Zoho CRM” application from Zoho Marketplace.
- After installation, configure SMS and/or WhatsApp account using Username and Password.
- Send SMS DLR Webhook, WhatsApp DLR Webhook and WhatsApp Inbound Webhook to ValueFirst sales/support team for configuration of delivery report and WhatsApp inbound messages.

Delivery and Inbound Webhook

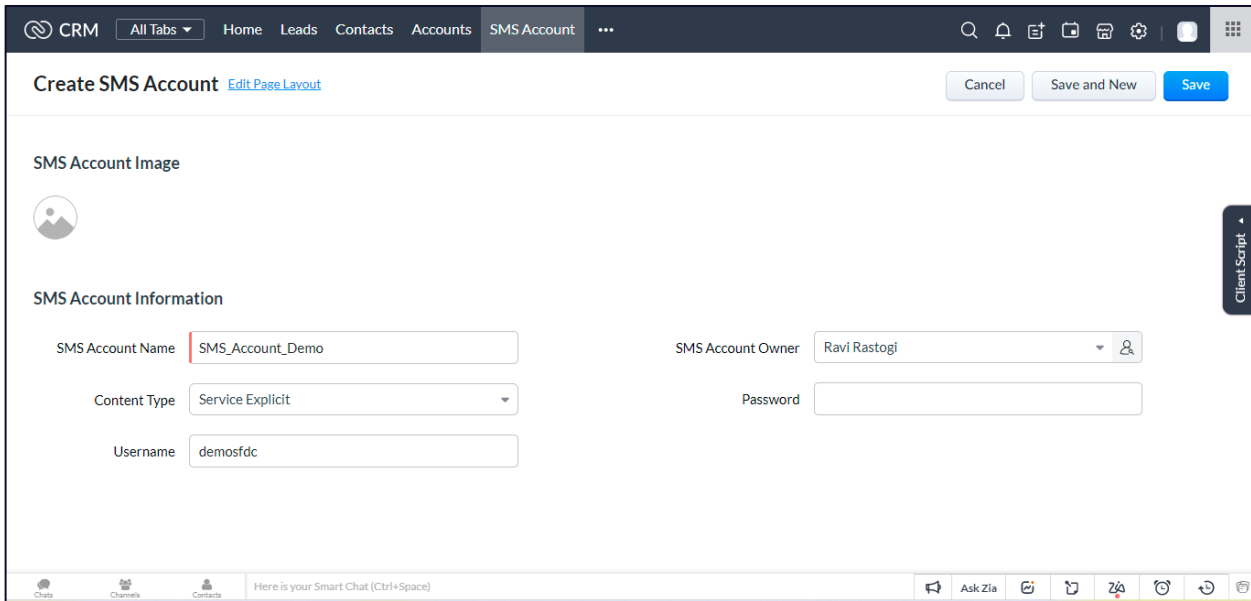
You can copy webhook from here and share with ValueFirst sales/support team.

Go to Marketplace All -> Installed -> click 'Configure'



Add SMS Account

In the "SMS Account" Module -> Click on Create SMS Account button.



Add Sender ID

In the "Map Sender Id" Module -> Click on Map Sender Id button and map sender id with created account.

The screenshot shows the 'Create Map Sender Id' form in a CRM application. The form is titled 'Create Map Sender Id' and has a navigation bar at the top with 'CRM', 'All Tabs', 'Home', 'Leads', 'Contacts', 'Accounts', and 'Map Sender Id'. The form contains the following fields:

- Map Sender Id Image:** A placeholder image icon.
- Map Sender Id Information:**
 - Map Sender Id Name:** Text input field containing 'SenderId_Demo'.
 - Map Sender Id Owner:** Dropdown menu with 'Ravi Rastogi' selected.
 - Account Name:** Text input field containing 'ACC_demohubspot'.
 - Sender Id:** Text input field containing 'UNIMSG'.

Buttons at the top right include 'Cancel', 'Save and New', and 'Save'. A 'Client Script' button is visible on the right side. The bottom of the screen shows a chat bar with 'Here is your Smart Chat (Ctrl+Space)' and various icons.

Add SMS Template/s

In the "SMS Template" Module -> Click on Create SMS Template button and map with SMS configuration.

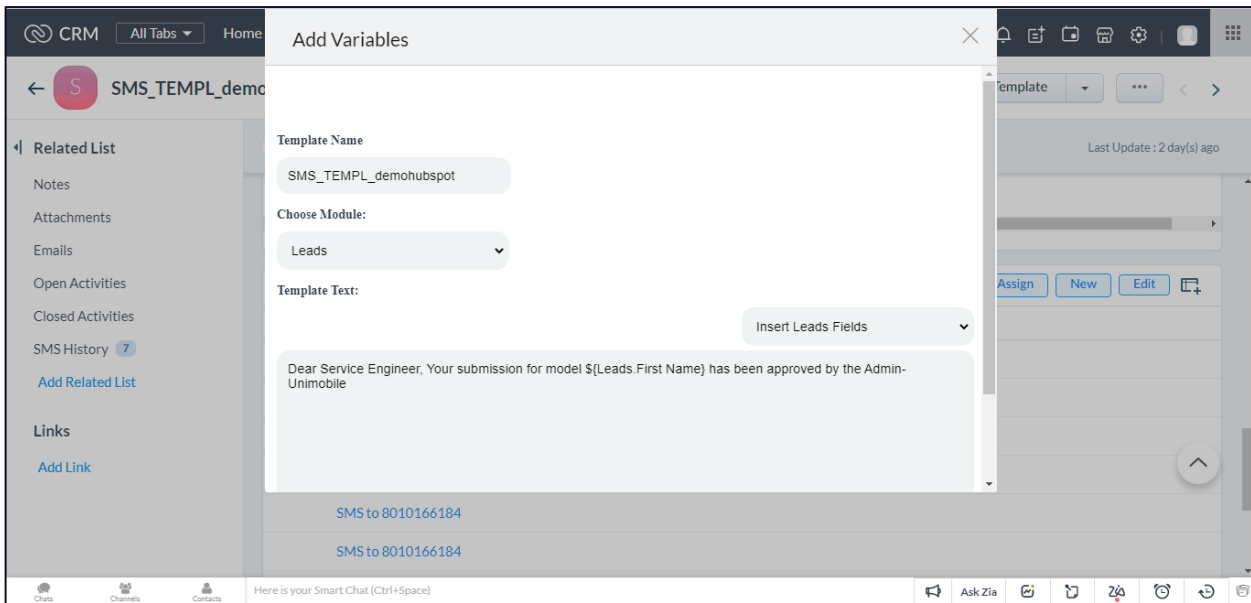
The screenshot shows the 'Create SMS Template' form in a CRM application. The form is titled 'Create SMS Template' and has a navigation bar at the top with 'CRM', 'All Tabs', 'Home', 'Leads', 'Contacts', 'Accounts', and 'SMS Template'. The form contains the following fields:

- SMS Template Image:** A placeholder image icon.
- SMS Template Information:**
 - Template Name:** Text input field containing 'Template_Dummy'.
 - Content Type:** Dropdown menu with 'Service Explicit' selected.
 - Module:** Dropdown menu with 'Accounts' selected.
 - SMS Config:** Text input field containing 'SMS_CONFIG_demohubspot'.
 - SMS Template Owner:** Dropdown menu with 'Ravi Rastogi' selected.
 - DLT TemplateId:** Text input field containing '1107165060861937622'.
 - Template Text:** Text area containing 'Dear Service Engineer, Notification sent to Customer against your submission for model [#var#]-Unimobile'.

Buttons at the top right include 'Cancel', 'Save and New', and 'Save'. A 'Client Script' button is visible on the right side. The bottom of the screen shows a chat bar with 'Here is your Smart Chat (Ctrl+Space)' and various icons.

Add Variables

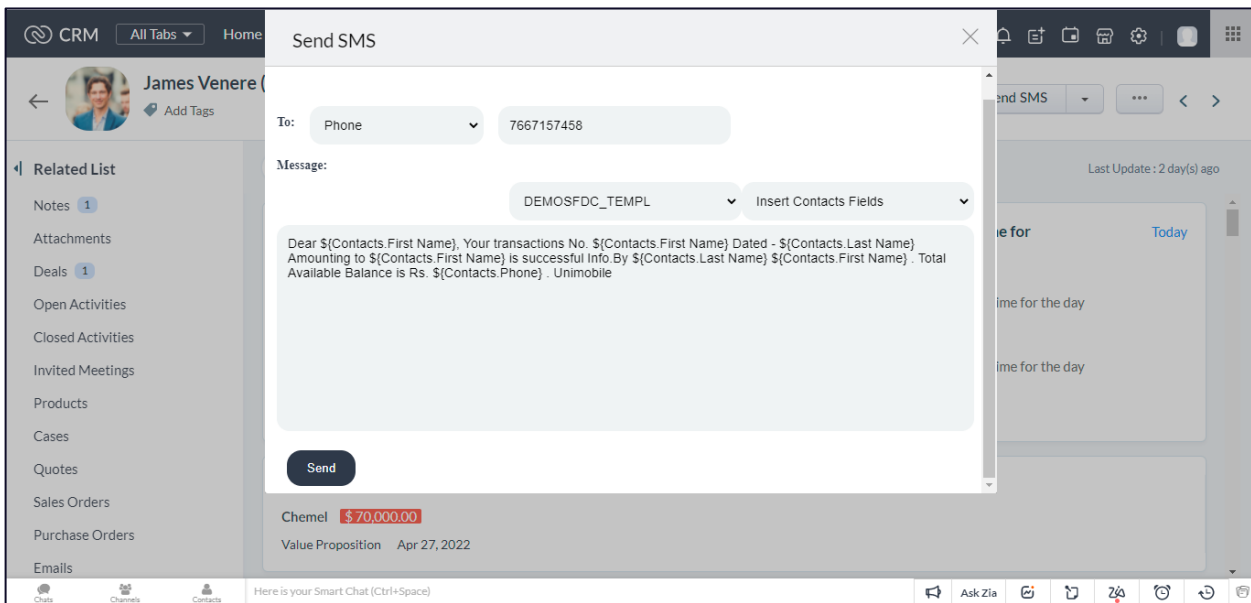
In the “SMS Template” Module -> Click on the Add Variables button to insert values against variables. Simply remove the .* click on insert fields and select the required field name.



Send SMS

Go inside the contact or respective module, click on “Send SMS” button from Leads, Contacts and Accounts module. You can choose templates and phone fields here.

For bulk SMS select the list of Leads, Contacts or Accounts from grid and click on same button i.e. “Send SMS”, choose template and click on send.



SMS Report

After sending the SMS transaction data can be seen in "SMS History" custom module.

The screenshot shows the CRM interface for an SMS report. The top navigation bar includes 'CRM', 'All Tabs', 'Home', 'Leads', 'Contacts', 'Accounts', and 'SMS Report'. The main header shows 'SMS to 7667157458' with 'Send Email' and 'Edit' buttons. The left sidebar has 'Related List' with options like Notes, Attachments, Emails, Open Activities, Closed Activities, and Add Related List. The main content area has 'Overview' and 'Timeline' tabs. Under 'Hide Details', the 'SMS Report Information' section is displayed:

SMS Report Name	SMS to 7667157458	SMS Report Owner	Ravi Rastogi
Created By	Ravi Rastogi Thu, 19 May 2022 12:08 PM	Modified By	Ravi Rastogi Thu, 19 May 2022 12:08 PM
Account	—	Contact	James Venere (Sample)
GUID	km5jc083574211f410a00ua65hDEMORAVIXM	Lead	—
Message	Dear Customer, Your Demo Account has been created- Unimobile	Number	7667157458
Status	Sent	Template	MANISH_VF_SMS_TEMPL

The 'Status' field is highlighted with a red box. The bottom status bar shows 'Here is your Smart Chat (Ctrl+Space)' and 'Ask Zia'.

WhatsApp configuration

Go to Marketplace All -> Installed -> click 'Configure'

Update the WhatsApp Username, Password and Number.

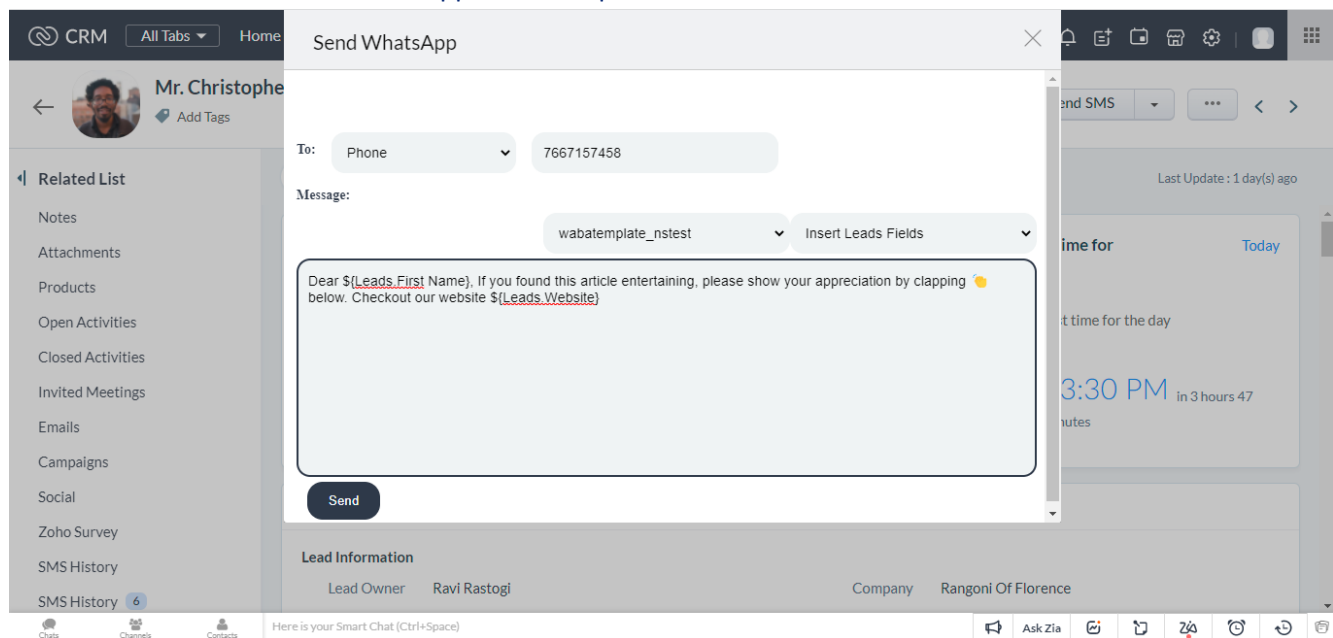
The screenshot shows the CRM 'Extension Settings' dialog for WhatsApp. The background shows the 'Setup' page with 'Marketplace' expanded to 'All'. The dialog has the following fields:

- SMS DLR Webhook: <https://www.zohoapis.com/crm/v2/fu>
- WhatsApp DLR Webhook: <https://www.zohoapis.com/crm/v2/fu>
- WhatsApp Inbound Webhook: <https://www.zohoapis.com/crm/v2/fu>
- WhatsApp Number: [Redacted]
- WhatsApp Password: [Redacted]
- WhatsApp Username: [Redacted]

Buttons for 'Cancel' and 'Save' are at the bottom of the dialog. The background shows a list of WhatsApp configurations with columns for Name, Webhook URL, and Number.

Auto Fetch WhatsApp Template

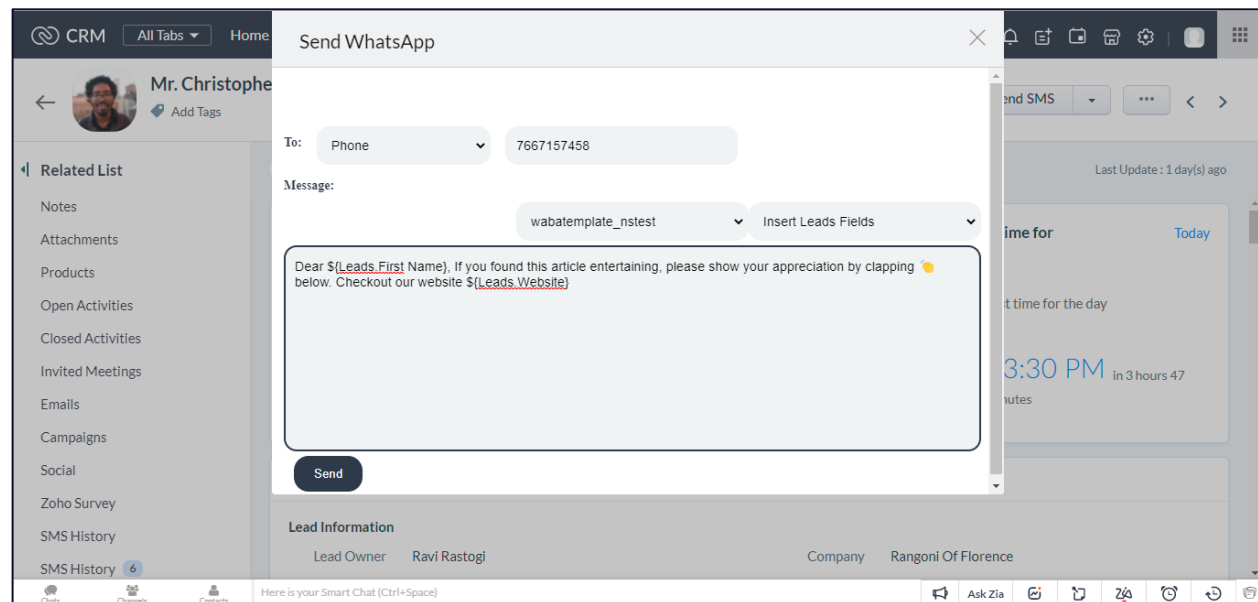
Go inside the contact or respective module, click on “Send WhatsApp” button from Leads, Contacts and Accounts module. You can choose Approved Templates.



Send WhatsApp Message

Go inside the contact or respective module, click on “Send WhatsApp” button from Leads, Contacts and Accounts module. You can choose templates and phone fields here.

For bulk WhatsApp message select the list of Leads, Contacts or Accounts from grid and click on same button i.e. “Send WhatsApp”, choose template (Enter the media URL or select from system if required) and click on send.



WhatsApp Report

After sending the message transaction data can be seen in “WhatsApp History” custom module.

The screenshot shows the 'WhatsApp Report' interface for a contact named 'WhatsApp to 7667157458'. The interface includes a navigation menu on the left with options like 'Notes', 'Attachments', 'Emails', 'Open Activities', 'Closed Activities', 'Add Related List', 'Links', and 'Add Link'. The main content area is titled 'Hide Details' and contains 'WhatsApp History Information'. The information is as follows:

WhatsApp History Information	
WhatsApp History Name	WhatsApp to 7667157458
WhatsApp History Owner	Ravi Rastogi
Created By	Ravi Rastogi Thu, 19 May 2022 12:54 PM
Modified By	Ravi Rastogi Thu, 19 May 2022 12:54 PM
Account	—
Contact	—
GUID	km5jc5442550h1f440e00pecp pDEMOVKRNTW
Lead	Christopher Maclead
Media	<a href="https://api.myfirst.com/mediad
ata/document/165294507429
3.pdf">https://api.myfirst.com/mediad ata/document/165294507429 3.pdf
Status	Read
Recipient Number	7667157458
Message	Dear Christopher, Attached is the booking receipt for your reference.

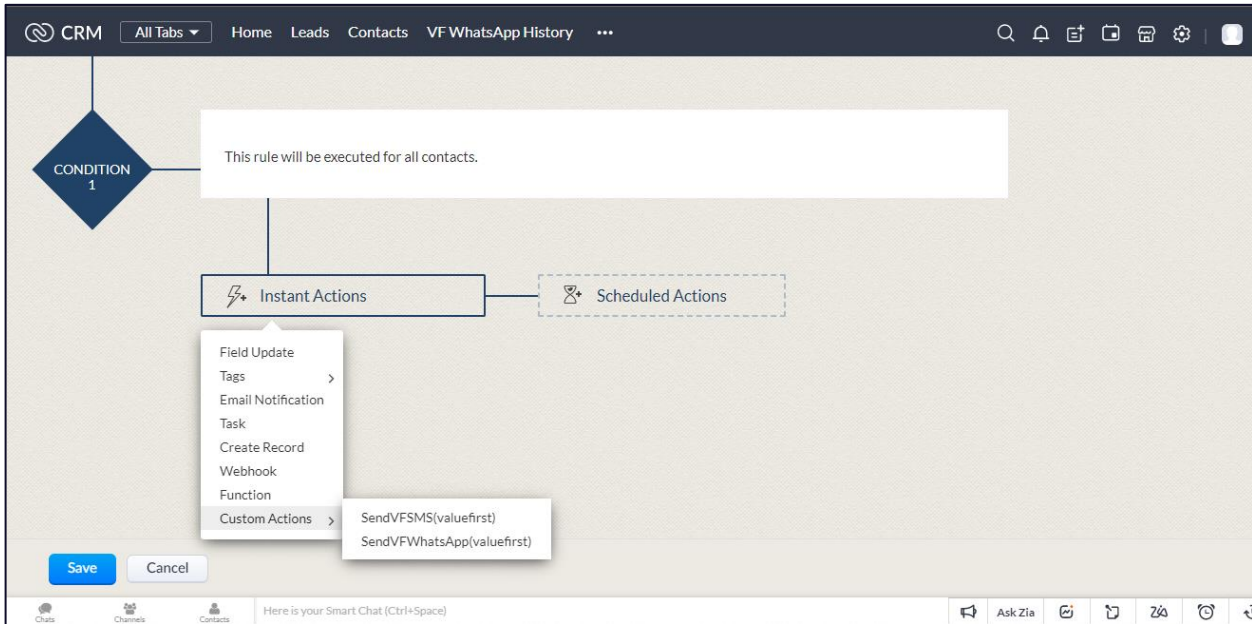
Inbound Message

The screenshot shows the 'SMS Report' interface for a contact named 'SMS to 8010166184'. The interface includes a navigation menu on the left with options like 'Notes', 'Attachments', 'Emails', 'Open Activities', 'Closed Activities', 'Add Related List', 'Links', and 'Add Link'. The main content area is titled 'Hide Details' and contains 'SMS Report Information'. The information is as follows:

SMS Report Information	
SMS Report Name	SMS to 8010166184
SMS Report Owner	Ravi Rastogi
Created By	Ravi Rastogi Tue, 17 May 2022 12:21 PM
Modified By	Ravi Rastogi Tue, 17 May 2022 12:21 PM
Account	—
Contact	—
GUID	km5hc214134431f410a110- 7a3DEMOHUBSPO
Lead	MANISH KUMAR Pandey
Number	8010166184
Template	SMS_TEMPL_demohubspot
Message	Dear Service Engineer, Your submission for model [#var#] has been approved by the Admin-Unimobile
Status	Delivered

Setup Zoho Workflow for SMS and WhatsApp Channel

Under “Workflow Action”, choose Send SMS/Send VF WhatsApp



You can choose template and phone fields here and click Save.

