
SMS/ WhatsApp Extension Setup guide



Sep 2024

**ValueFirst Digital
Media Authored
by: Ravi Rastogi**

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

- Multiple account of SMS and WhatsApp can be configured
- Both Unified & Legacy API Support.
- Facility to manage SMS and WhatsApp templates
- SMS/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

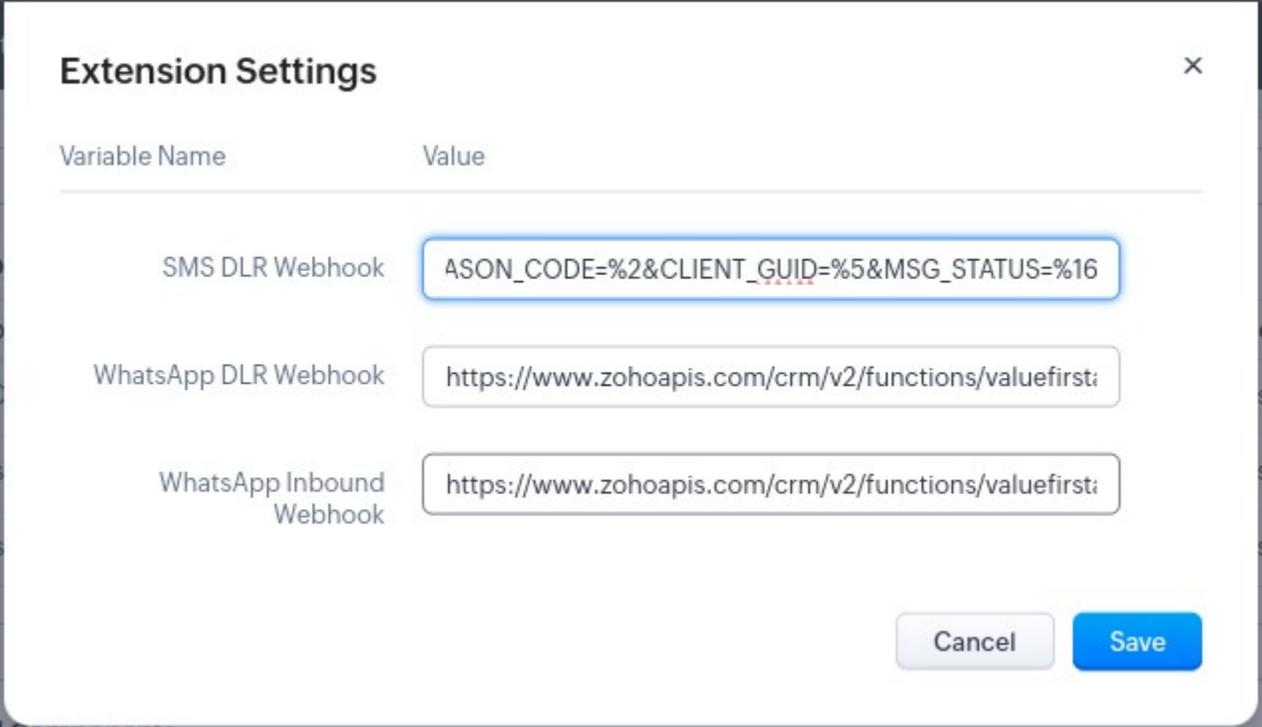
- XML account for SMS and WhatsApp channel API or Unified API
- IP whitelisting against XML account at ValueFirst side

Installation

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

Inbound Webhook

You can copy webhook from here and share with ValueFirst sales/support team. Go to Marketplace All -> Installed -> click 'Configure'



The screenshot shows a dialog box titled "Extension Settings" with a close button (X) in the top right corner. It contains a table with two columns: "Variable Name" and "Value".

Variable Name	Value
SMS DLR Webhook	ASON_CODE=%2&CLIENT_GUID=%5&MSG_STATUS=%16
WhatsApp DLR Webhook	https://www.zohoapis.com/crm/v2/functions/valuefirst:
WhatsApp Inbound Webhook	https://www.zohoapis.com/crm/v2/functions/valuefirst:

At the bottom right of the dialog box, there are two buttons: "Cancel" and "Save".

Add SMS Account

In the "SMS Account" Module -> Click on Create SMS Account button. Specify SMS Account Name and Save. Click Edit Account and provide the required values.

Edit Account [Close] [Add]

Name
SMS UNI ACC Legacy API Unified

UserName sandboxekc1ccpoy4kbbhaho **Password**

Sender ID ValueFirst **Region** KSA ▼

Save

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.

Send SMS



To: Phone

SMS Account:

Sender ID:

Template:

Dear Customer, Your Demo Account has been created-
Unimobile

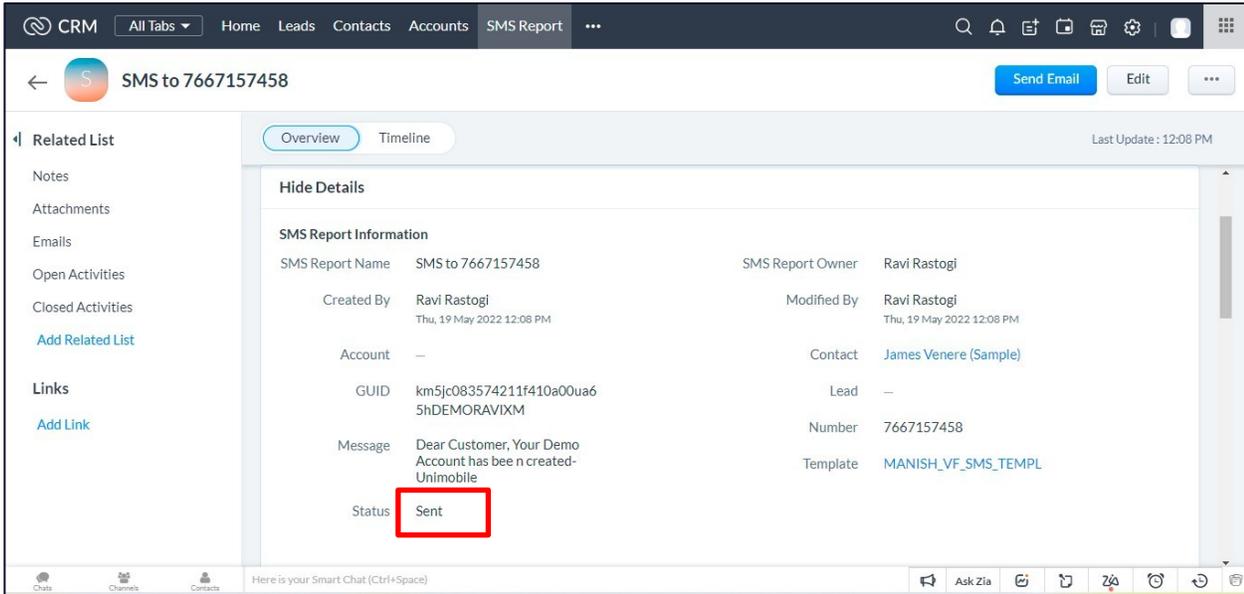
Dear Customer, Your Demo Account has been created-
Unimobile

Send Message

Preview Message

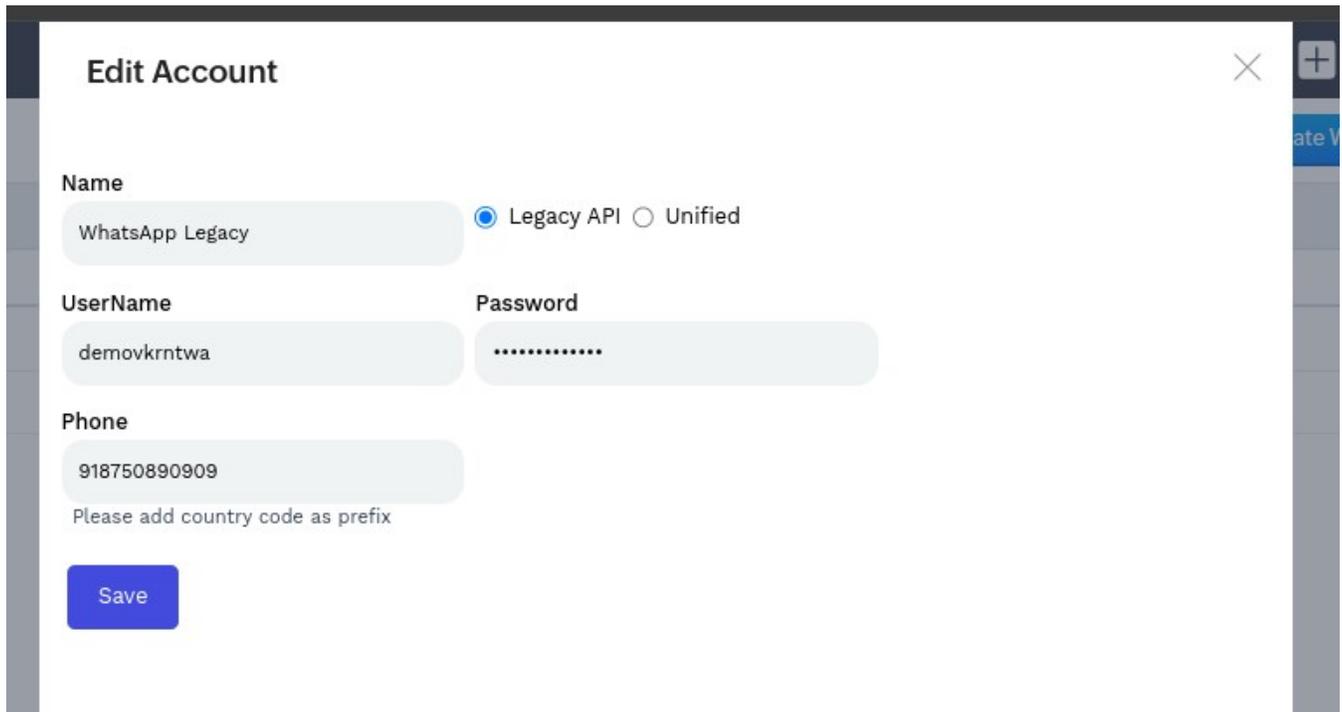
SMS Report

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



WhatsApp Report

In the “WhatsApp Account” Module -> Click on Create WhatsApp Account button. Specify WhatsApp Account Name and Save. Click Edit Account and provide the required values.



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.

The screenshot shows a "Send WhatsApp" dialog box. It includes the following fields and options:

- To:** Phone (dropdown), 7667157458 (text field)
- WhatsApp Account:** Whats app new2 (dropdown)
- Business Number:** 966114628555 (text field)
- Template:** Search... (input field) with a scrollable list of templates: 24temp4, 24temp3, 24temp2, 24temp1, info_update_text, test_api_soumya, auto_reply, automatic_reply, buttons_ca.
- Image:** Image (dropdown), Enter Media URL (text field)

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 – If required) and click on send.

Send WhatsApp

To: Phone 7667157458

WhatsApp Account: WhatsApp Legacy Business Number: 918750890909 Template: varibale_in_the_end_of_the

this test template has a variable in the body {{1}} .

this test template has a variable in the body **Kris** .

{{1}} First Name

Send Message Preview Message

WhatsApp Report

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

The screenshot shows the CRM interface for a WhatsApp report. The main content area is titled "WhatsApp History Information" and contains the following details:

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	https://api.myfirst.com/mediadata/document/1652945074293.pdf	Status	Read
Message	Dear Christopher, Attached is the booking receipt for your reference.		
Recipient Number	7667157458		

module.

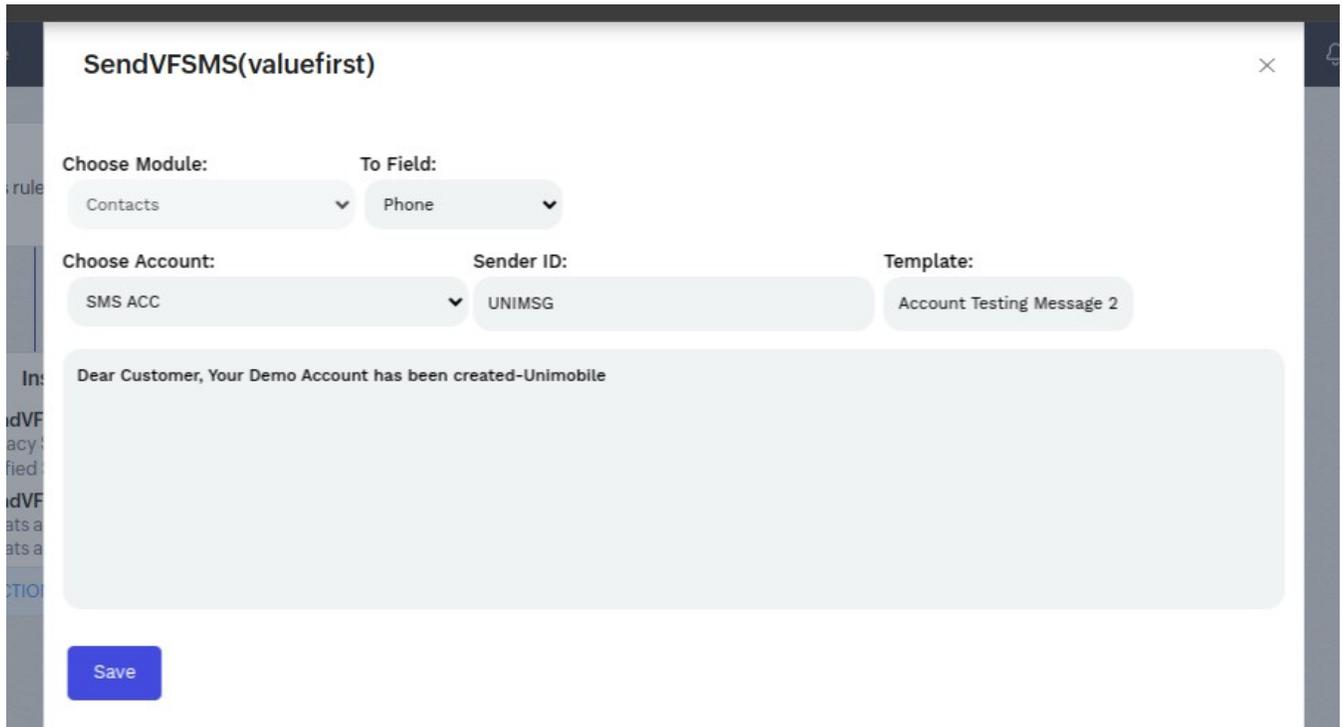
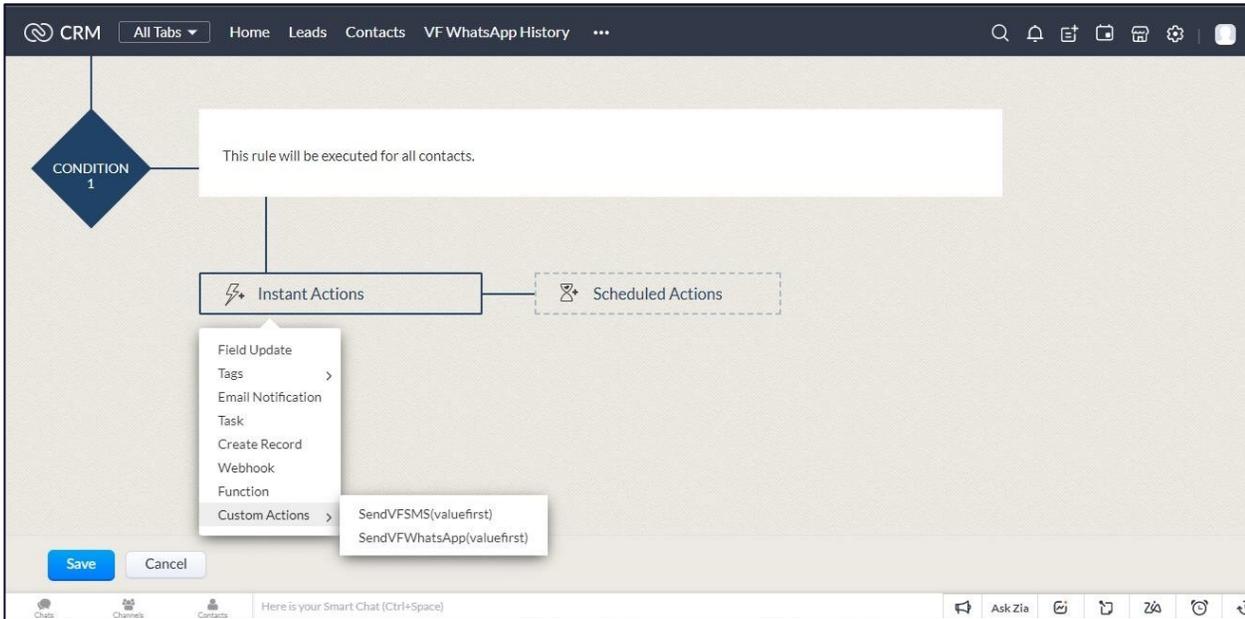
Inbound Message

The screenshot shows the CRM interface for an SMS report. The main content area is titled "SMS Report Information" and contains the following details:

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
Message	Dear Service Engineer, Your submission for model [#var#] has been approved by the Admin-Unimobile		
Status	Delivered		
Number	8010166184		
Template	SMS_TEMPL_demohubspot		

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.