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QUICK START GUIDE

Zoho CRM Integration

with BulkSMS.com

Connect Zoho CRM to the BulkSMS Integration Gateway, see every SMS and reply on your leads and contacts, send from workflow rules and send bulk SMS to your campaigns.



Welcome to BulkSMS.com

Trusted, scalable SMS messaging for your business

IN THIS GUIDE

01 Create a Zoho API client

02 Connect the Integration Gateway

03 Send from workflows and in bulk

ZOHO

BULKSMS.COM INTEGRATION GATEWAY FOR ZOHO CRM

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01 Foreword

Zoho CRM connects through a client you create in the Zoho API Console. It takes a few minutes, and you'll copy two values—the **Client ID** and **Client Secret**—into the Integration Gateway. Before you start, make sure you have the following ready.

BulkSMS account
With your BulkSMS API details saved in the Integration Gateway

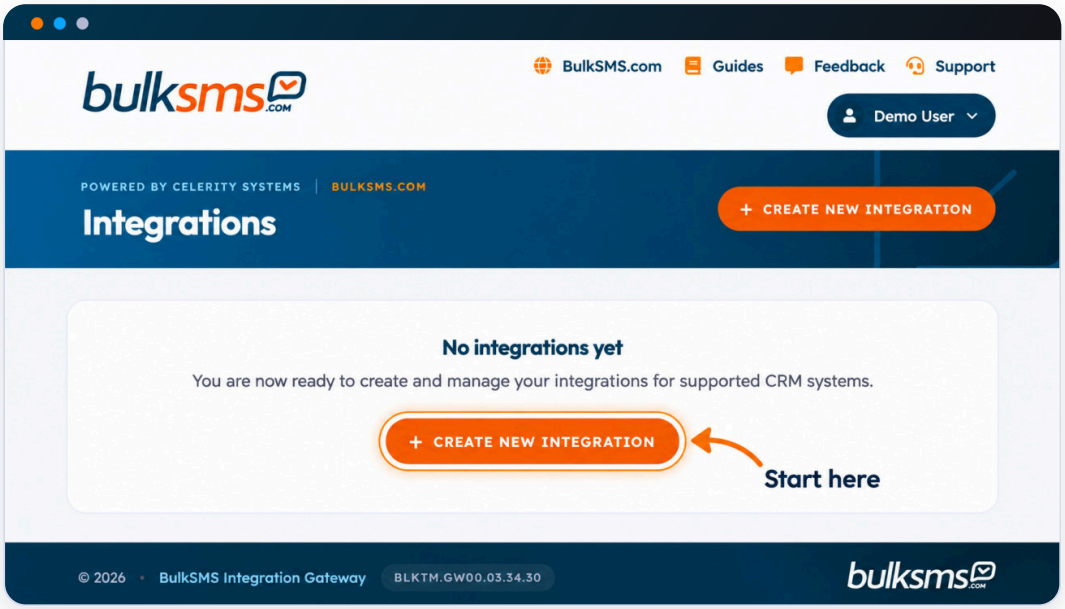
Zoho CRM login
A user who can create clients in the Zoho API Console and set up workflow rules

Your Zoho domain
The ending of your Zoho CRM address, e.g. .com in crm.zoho.com or .eu in crm.zoho.eu

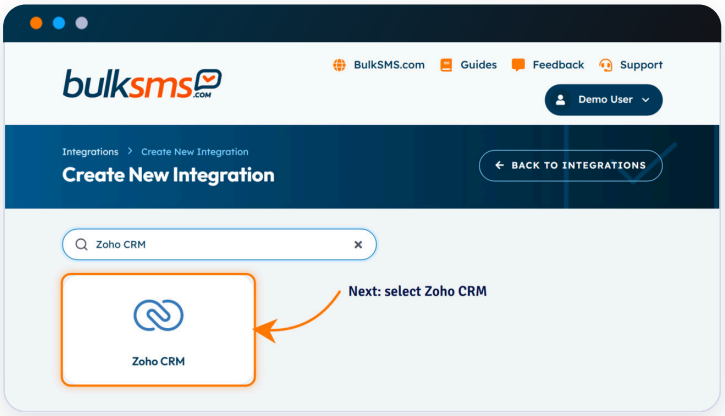
Sending SMS from Zoho workflow rules, and the SMS records on your leads and contacts, come from the **BulkSMS for Zoho CRM** extension. Install it in Zoho CRM if you haven't already. Bulk messages to campaigns work with the Integration Gateway alone.

02 Integration Setup

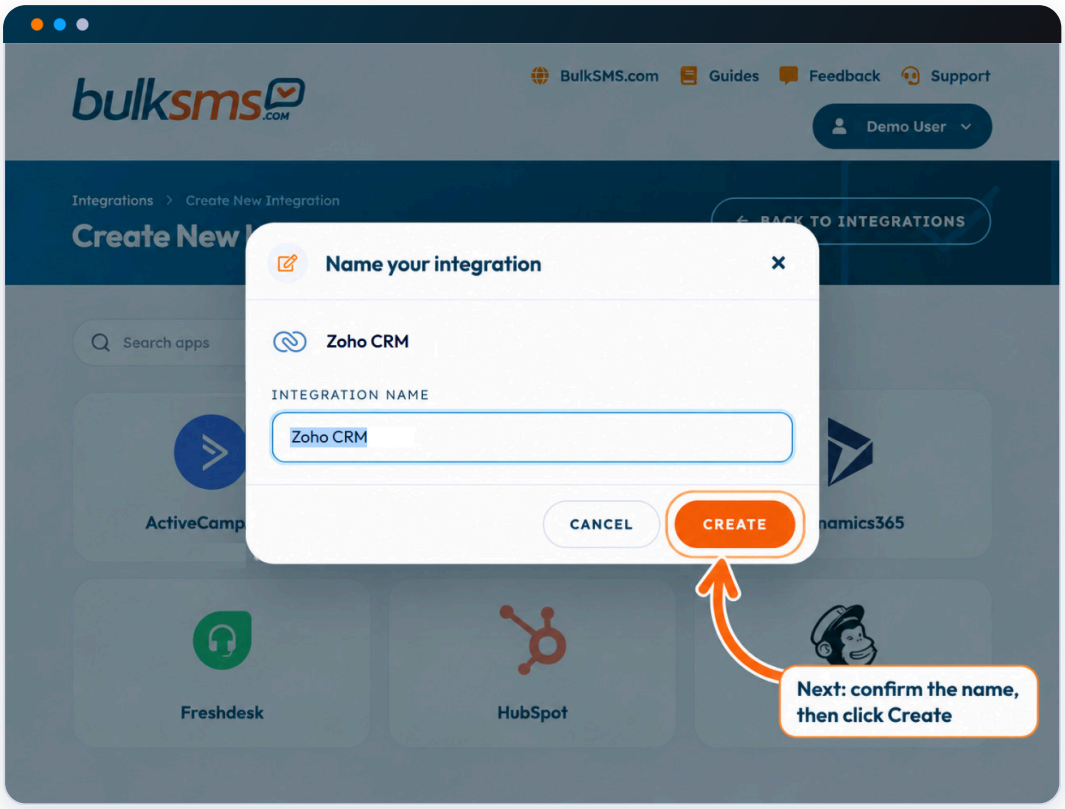
1. Sign up or log in to the BulkSMS Integration Gateway at www.bulksms.com/integration-gateway and click **Create New Integration**.



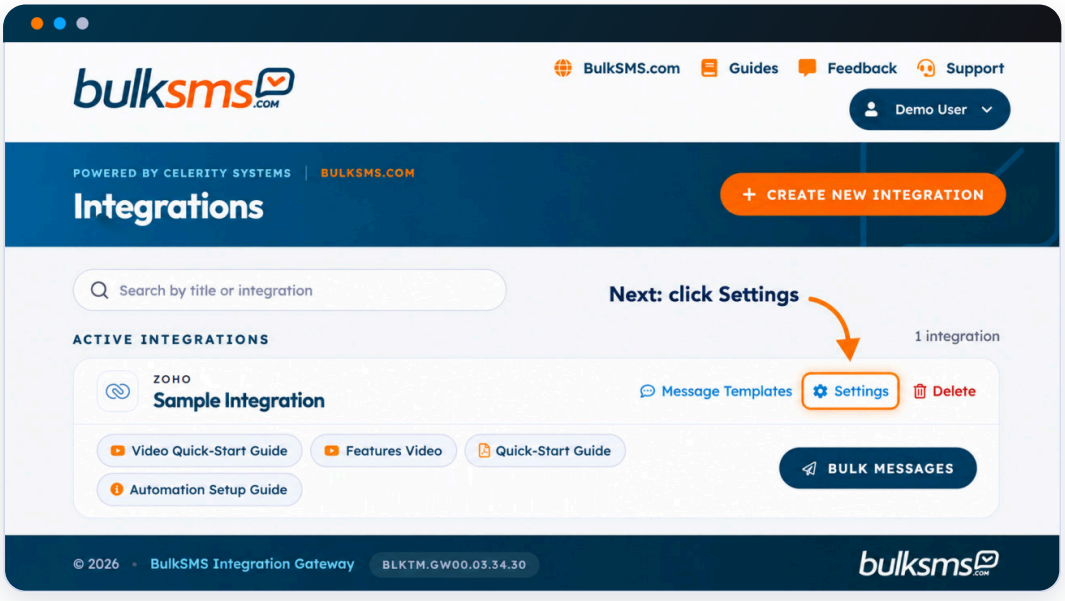
2. Select **Zoho CRM**. Type “Zoho” in **Search apps** to find it quickly.



3 Give your integration a name, or keep the one suggested, and click **Create**. The name can use letters, numbers, spaces, hyphens and underscores, up to 40 characters.



4 Your integration now appears on the Integrations page. Click **Settings**.

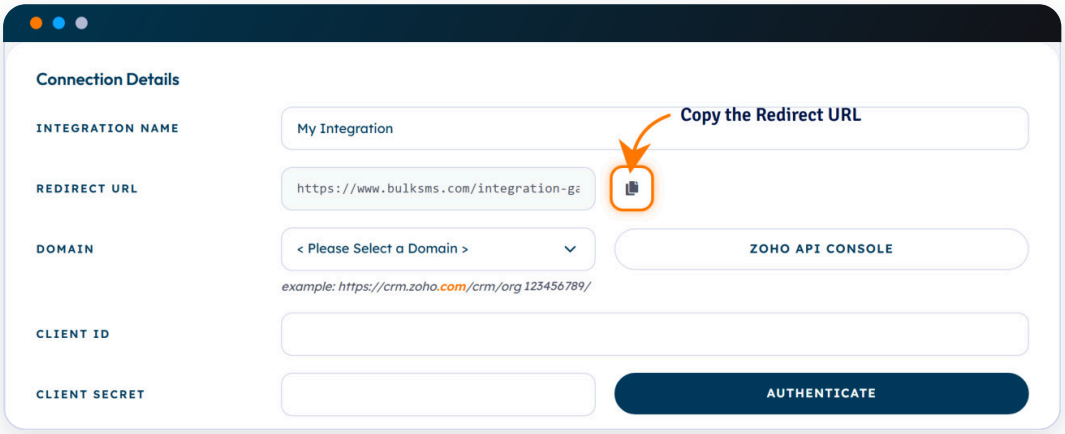


5 The first time you open Settings, you're asked for your **Default Country Code**—the country most of your contacts are in, e.g. 44 for the UK. Enter it and click **Next** to show the **Connection Details**.

03 Connect Zoho CRM

Create a Zoho API client

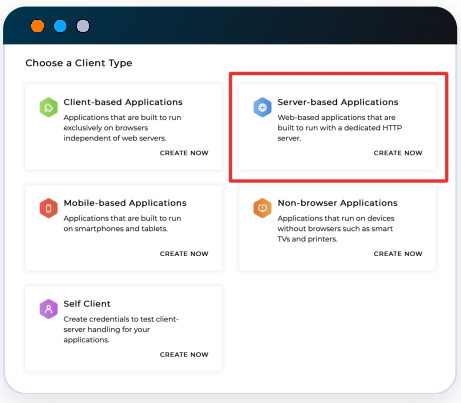
1. Under **Connection Details**, click the copy button next to **Redirect URL**. This address is unique to your integration.



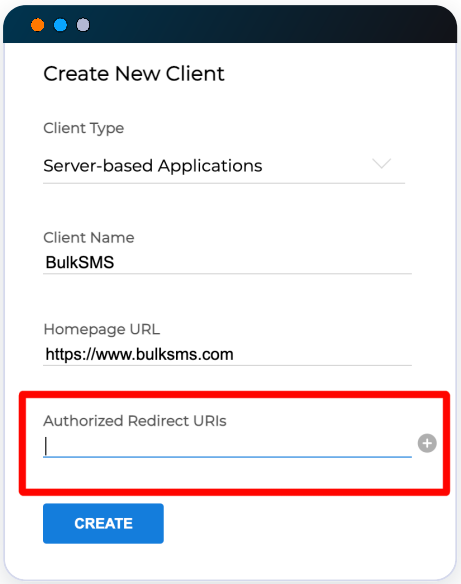
2. Choose your **Domain**: **US (.com)**, **Europe (.eu)**, **India (.in)**, **Australia (.com.au)** or **China (.com.cn)**. It's the ending of your Zoho CRM address—for example https://crm.zoho.com/crm/org123456789/tab/Home/begin is **US (.com)**.

3. Click **Zoho API Console** (it opens the console for your domain), sign in with your Zoho login and click **Add Client**.

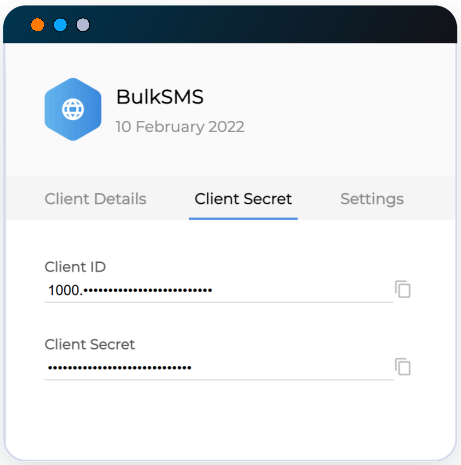
4. Choose **Server-based Applications**.



5 Enter a **Client Name** (e.g. BulkSMS) and **Homepage URL**, paste the Redirect URL into **Authorized Redirect URIs**, and click **Create**.



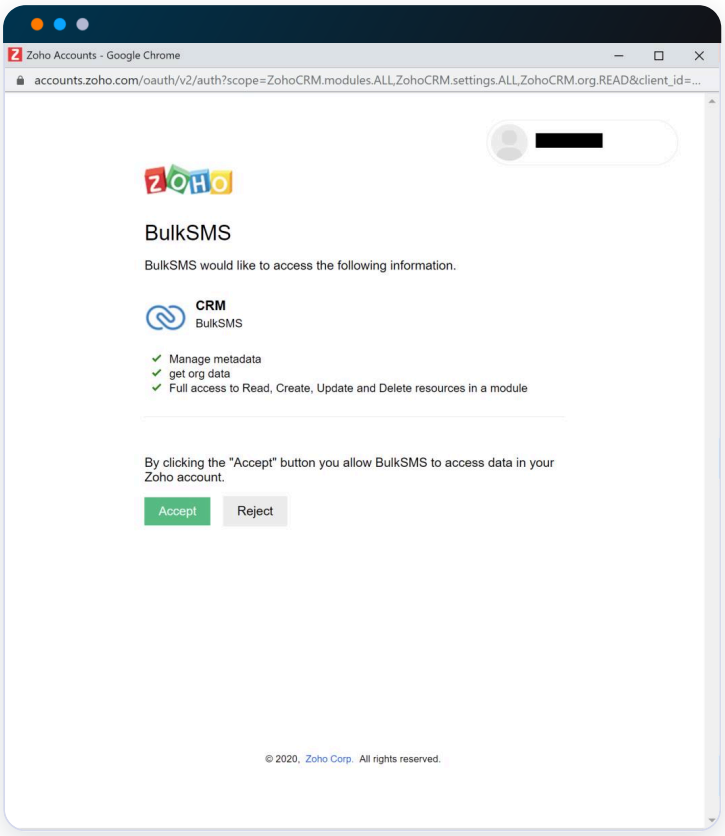
6 Zoho shows your **Client ID** and **Client Secret**. Copy them into the matching fields in the Integration Gateway.



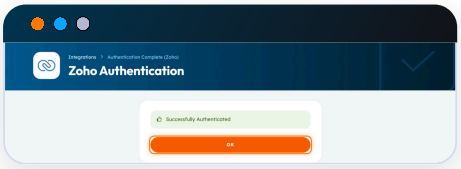
i Treat the Client Secret like a password. If you delete or change the client in the Zoho API Console later, the integration stops working until you authenticate again.

Authenticate

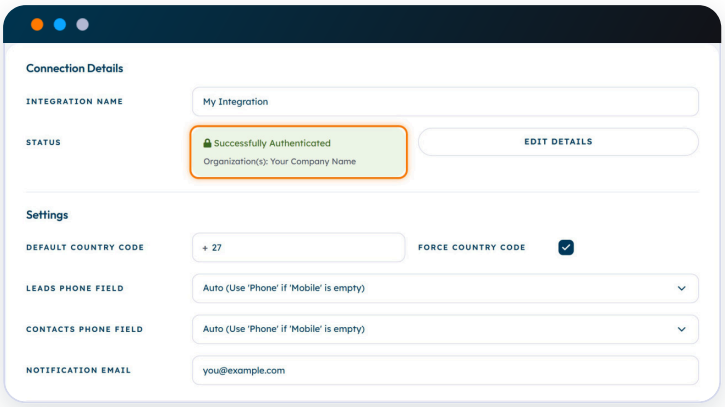
1 Click **Authenticate**. A Zoho window opens: sign in if asked and click **Accept** to let BulkSMS access your Zoho CRM data.



2 When you see **Successfully Authenticated**, click **OK**. The window closes and the Settings page reloads.



3 The **Status** now shows **Successfully Authenticated** and your Zoho organisation name. Use **Edit Details** if you ever need to change the client or authenticate again.



Complete your settings

Check the rest of the page, then click **Save Settings**:

- **Default Country Code** and **Force Country Code** – added to numbers that don't include a country code. Force Country Code is switched on when you authenticate; see Sending Tips before leaving it on.
- **Leads Phone Field** and **Contacts Phone Field** – which phone field to text. Any Zoho field of the Phone type can be chosen. **Auto (Use 'Phone' if 'Mobile' is empty)** is the default.
- **Notification Email** – required. Where the Integration Gateway sends notifications about this integration.
- **Activity Updates** – see the next section.

04 Activity Updates & Two-Way SMS

Activity Updates record what happens to your messages on the Zoho lead or contact: when an SMS is sent, delivered or fails, and when the person replies. They're switched on automatically the first time you open Settings after authenticating.

Choose what's recorded

Scroll to **Activity Updates** on the Settings page. With **Enabled** ticked, each message type can be set to **Include body** (the record shows the message text), **Exclude body** (recorded without the text) or **Disabled** (nothing is recorded).

OPTION	WHAT IT RECORDS IN ZOHO CRM
Sent Messages	An **SMS Sent** record when a message is sent, with the template and where it came from (a bulk message campaign or Zoho CRM).
Status Updates	An **SMS Delivered** or **SMS Failed** record, with the reason for any failure.
Reply Messages	An **SMS Reply** record with the reply text.
Update SMS fields on Entities	Keeps the SMS fields on the lead or contact up to date: last delivery status, last message delivered and last reply.

! If you build workflows on the reply fields, set **Reply Messages** to **Include body**. With Exclude body the reply text isn't saved to the lead or contact.

Good to know

- Contacts can only reply to messages sent from a **(repliable)** sender address or a phone number—not from a text sender name.
- A reply is linked to the last message you sent to that number.
- Unticking **Enabled** stops all four kinds of updates. If **Enabled** is unticked when you return to the page, the connection to your BulkSMS account needs setting up again—tick it and click **Save Settings**.

05 Automation Setup

The BulkSMS for Zoho CRM extension adds a **Send_SMS(widgetbulksms)** action to Zoho workflow rules, so you can text leads and contacts automatically—for example when a lead is created.

Automation Setup Guide

The same walkthrough online, with tips on formatting numbers.

OPEN →

Video Quick-Start Guide

A visual introduction to setting up the integration.

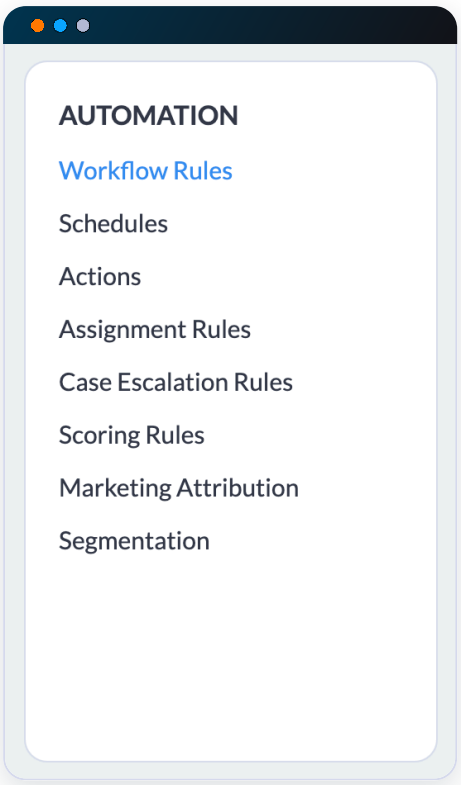
OPEN →

Features Video

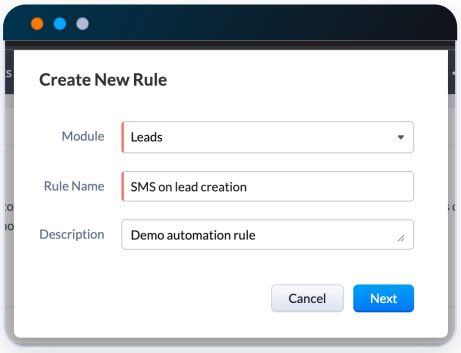
A tour of what the Zoho CRM integration can do.

OPEN →

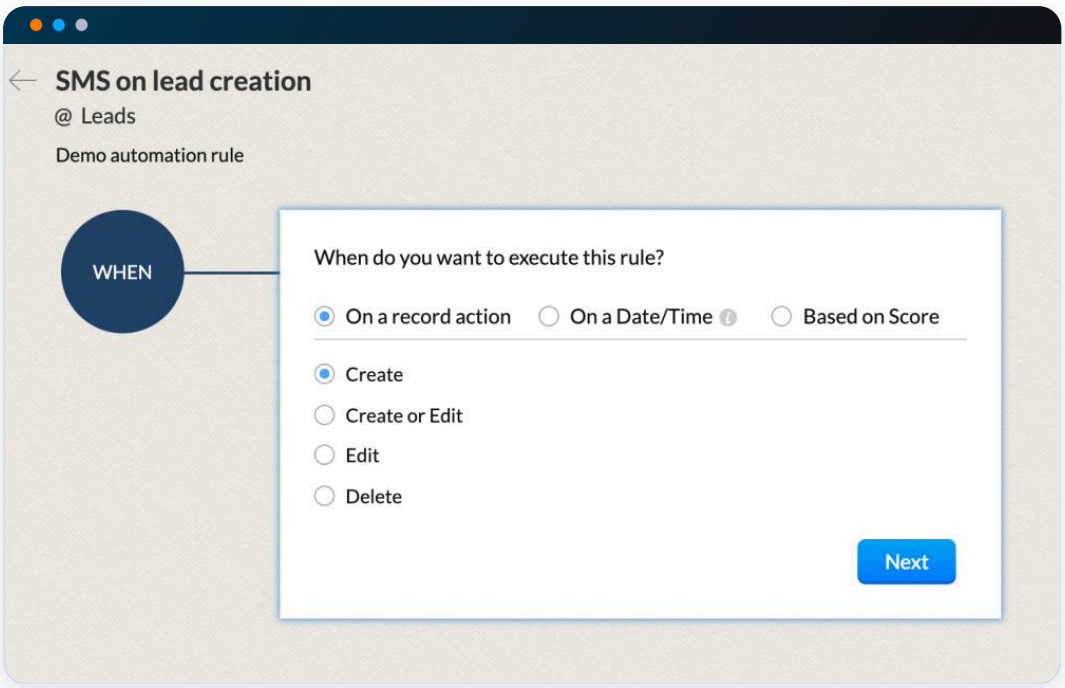
1 In Zoho CRM, open **Settings** (top right) and under **Automation** select **Workflow Rules**.



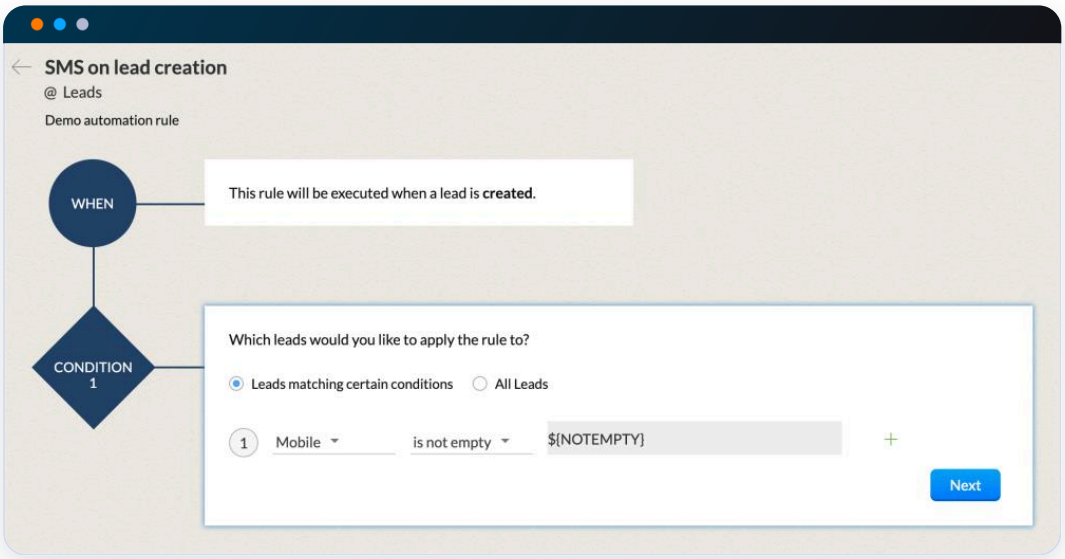
2 Click **+ Create Rule**, select the **Leads** or **Contacts** module, and give the rule a name and description.



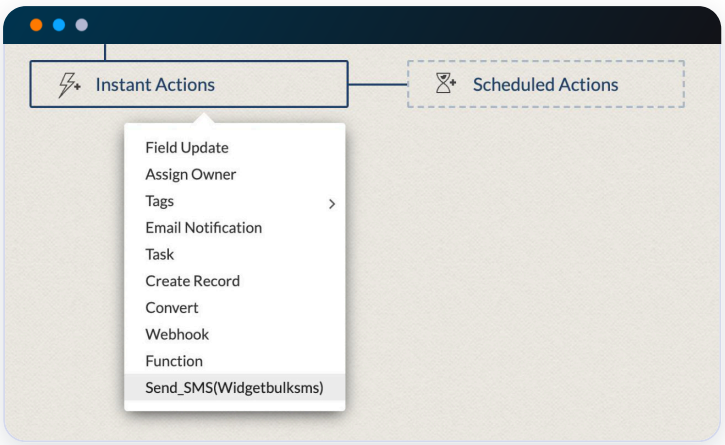
3 Set the trigger—in this example, when a record is **created**.



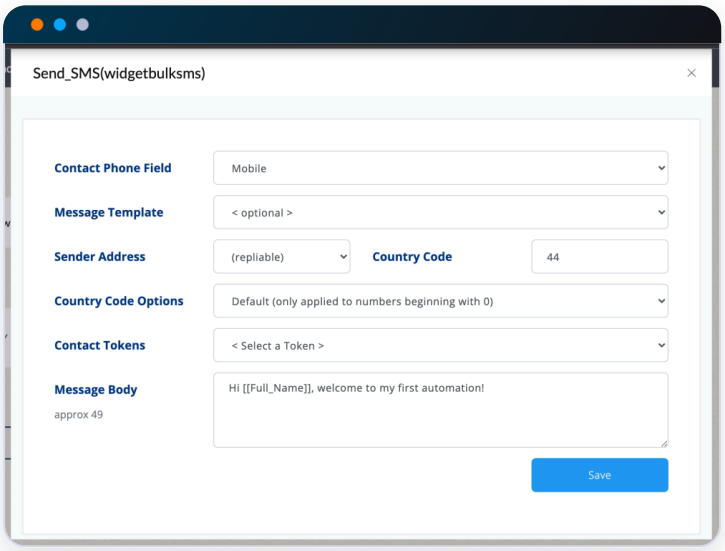
4 Add one or more conditions. Here the rule checks that **Mobile** is not empty.



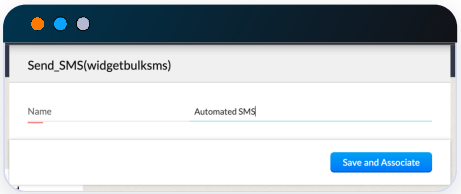
5 Under **Instant Actions**, choose **Send_SMS(widgetbulksms)** at the bottom of the list.



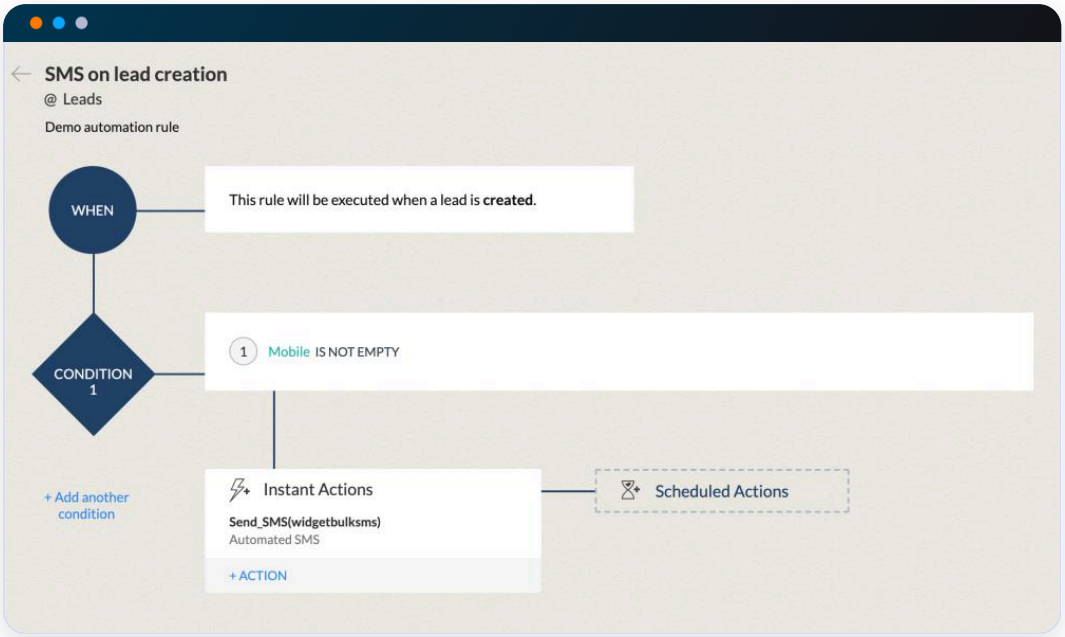
6 Set up the message: choose the phone field, an optional template, the sender, country code options and the message, adding tokens to personalise it. Click **Save**.



7 Give the custom action a title and save it.



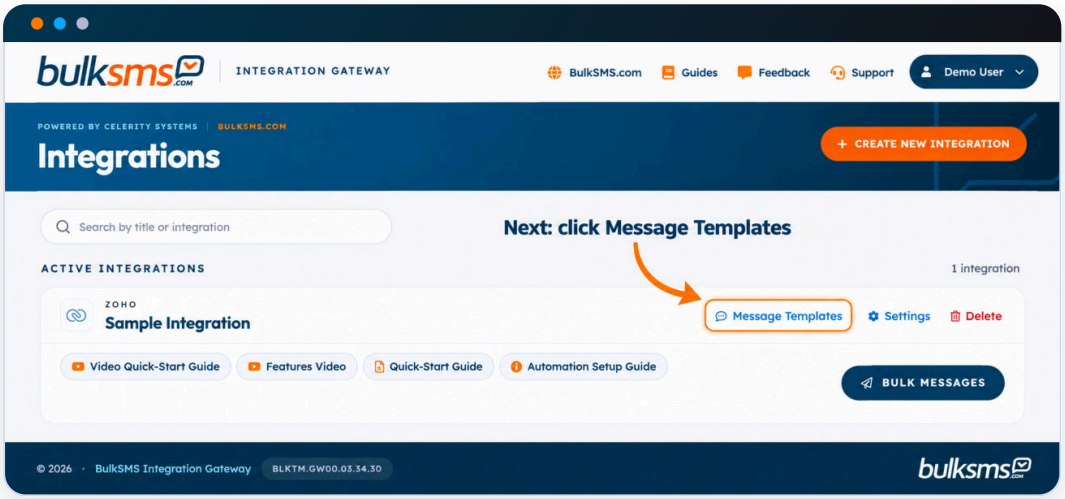
8 Your rule now shows the action under **Instant Actions**. Click **Save** and you're done.



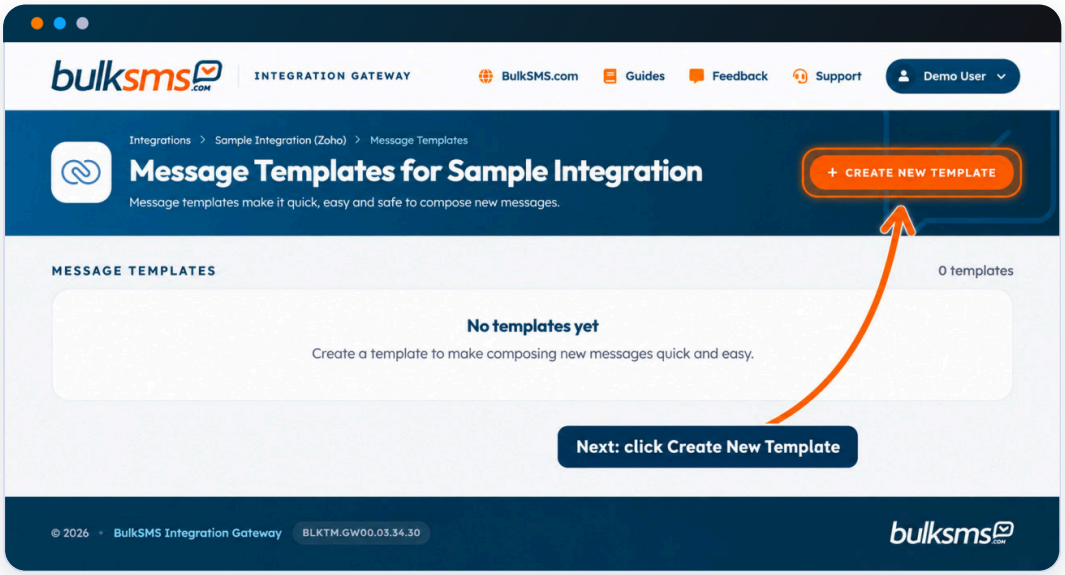
06 Message Templates

Templates let you save messages you send often, with tokens that personalise each message for the lead or contact.

1 On the Integrations page, click **Message Templates** for your integration.

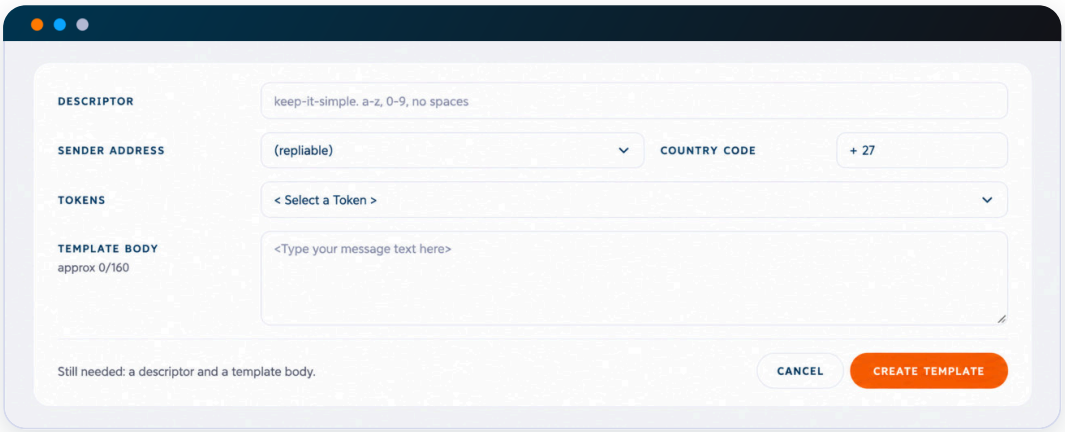


2 Click **Create New Template**.

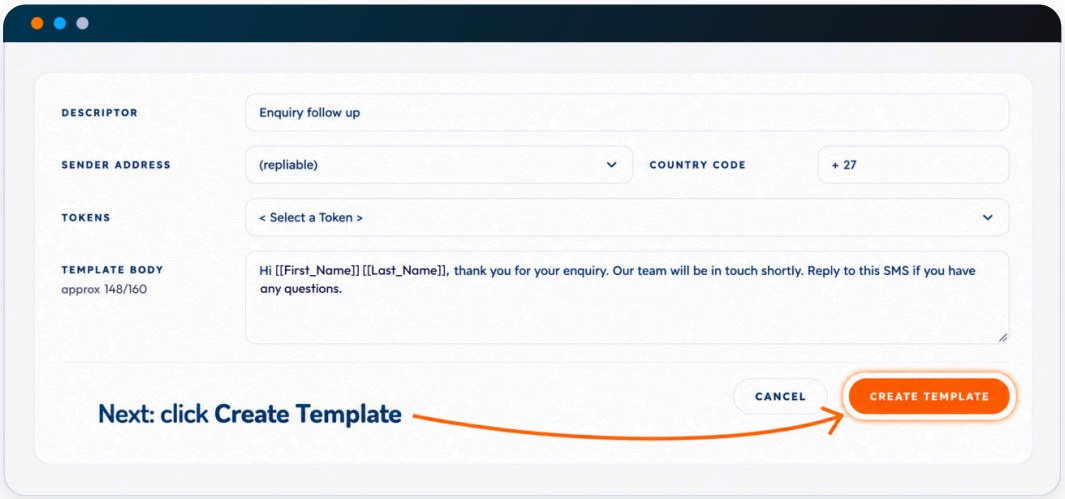


3 Fill in the template:

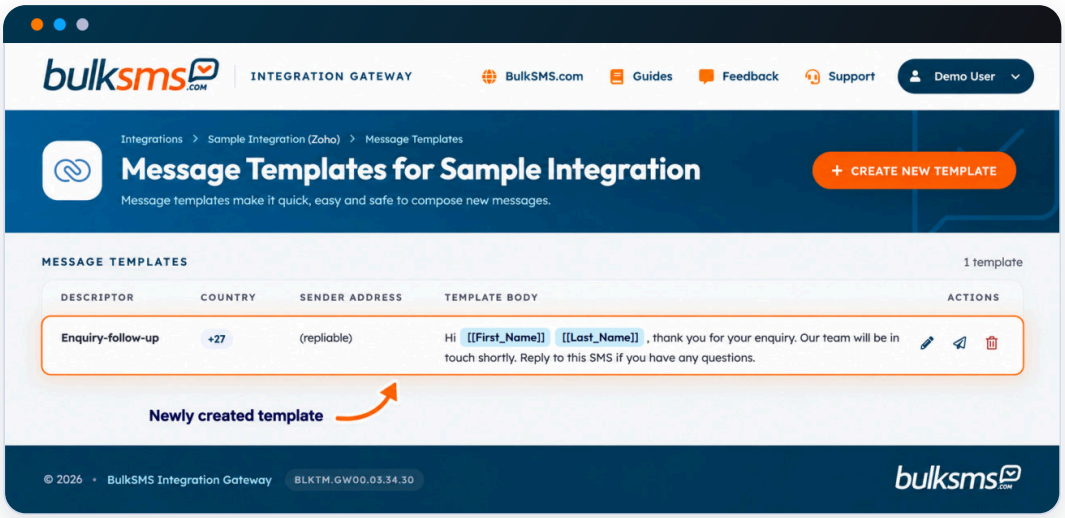
- **Descriptor** – a name for the template, using letters, numbers, spaces and hyphens (up to 30 characters). Spaces are saved as hyphens.
- **Sender Address** – keep **(repliable)** if you want people to be able to reply.
- **Country Code** – the default for this template. You can change it when you prepare a message.
- **Tokens** – pick a Zoho field to insert it into the message, including your custom fields. See Sending Tips.
- **Template Body** – your message. The counter shows the approximate length against 160 characters.



4 When the template is complete, click **Create Template**.



5 Your new template is listed under **Message Templates**. The icons on the right are **edit**, **prepare a bulk message** and **delete**.

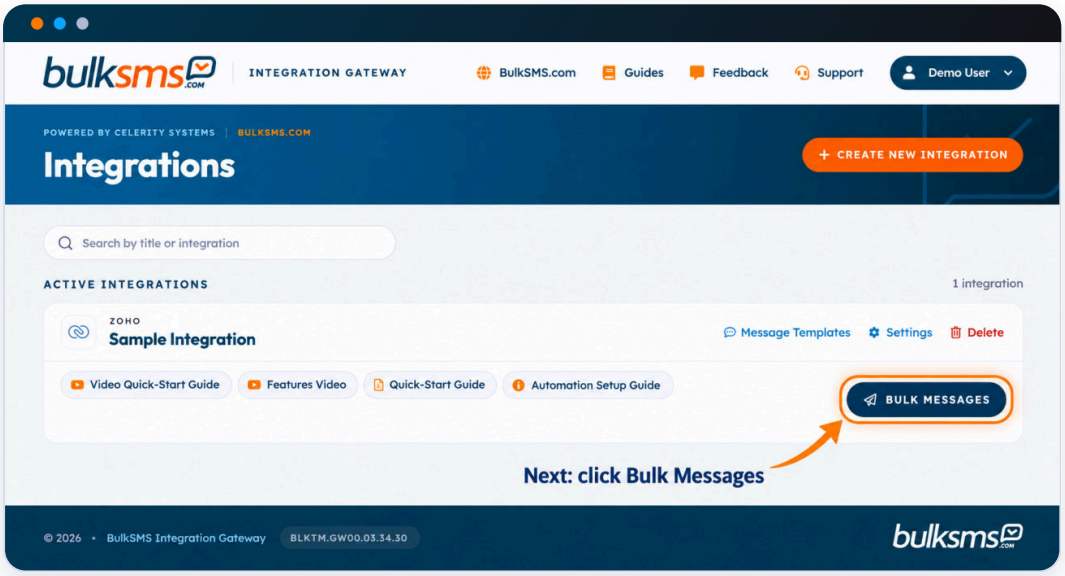


07 Bulk Messaging

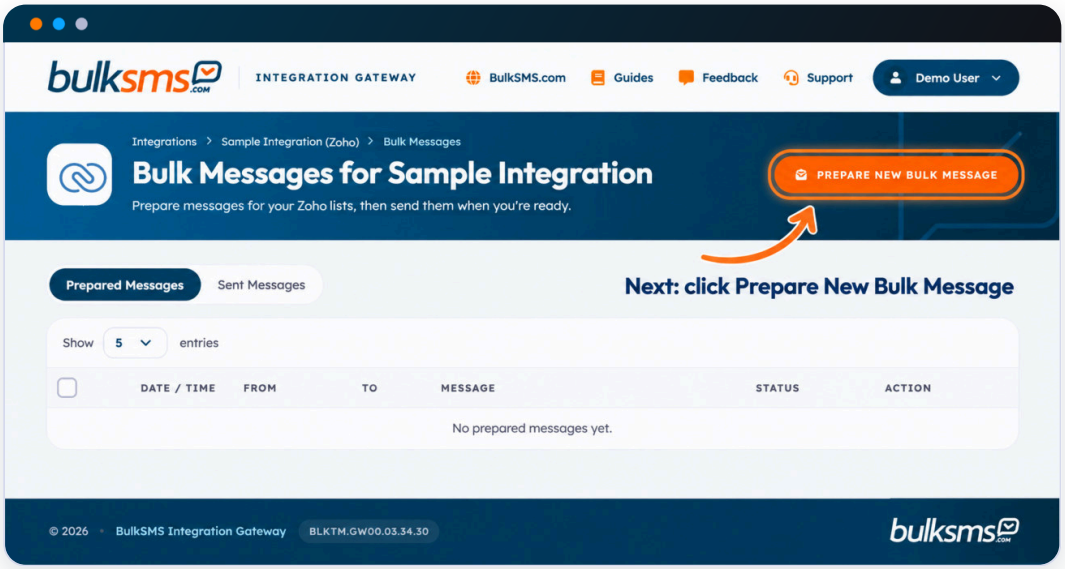
Send an SMS to the leads and contacts in a Zoho CRM campaign. You prepare the message first, check a sample, then send it.

Prepare the message

1 On the Integrations page, click **Bulk Messages** for your integration.

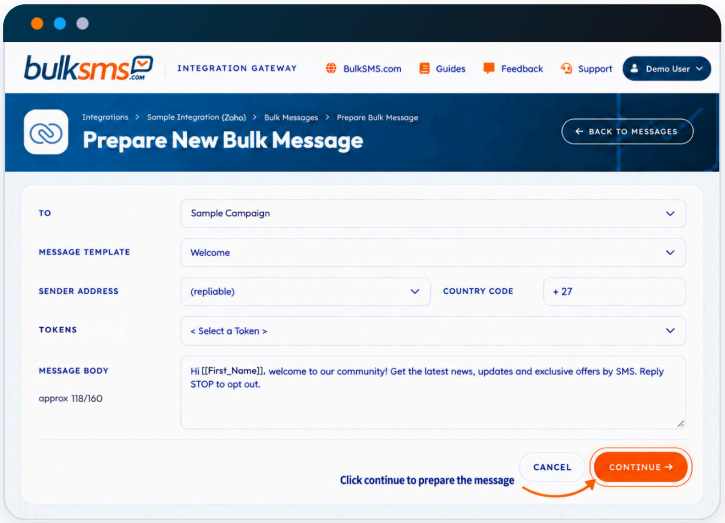


2 Click **Prepare New Bulk Message**.

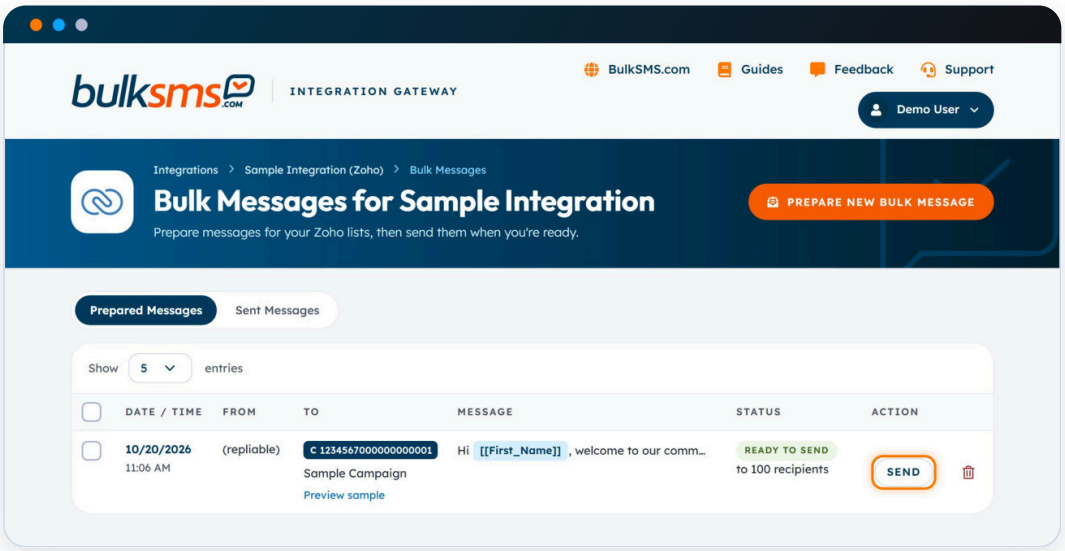


3 Fill in the form, then click **Continue**:

- **To** – the Zoho campaign to send to.
- **Message Template** – optional. Choosing one fills in the message, sender and country code, and you can still edit them.
- **Sender Address** and **Country Code** – as for templates.
- **Tokens** and **Message Body** – write or adjust the message, adding tokens as needed.

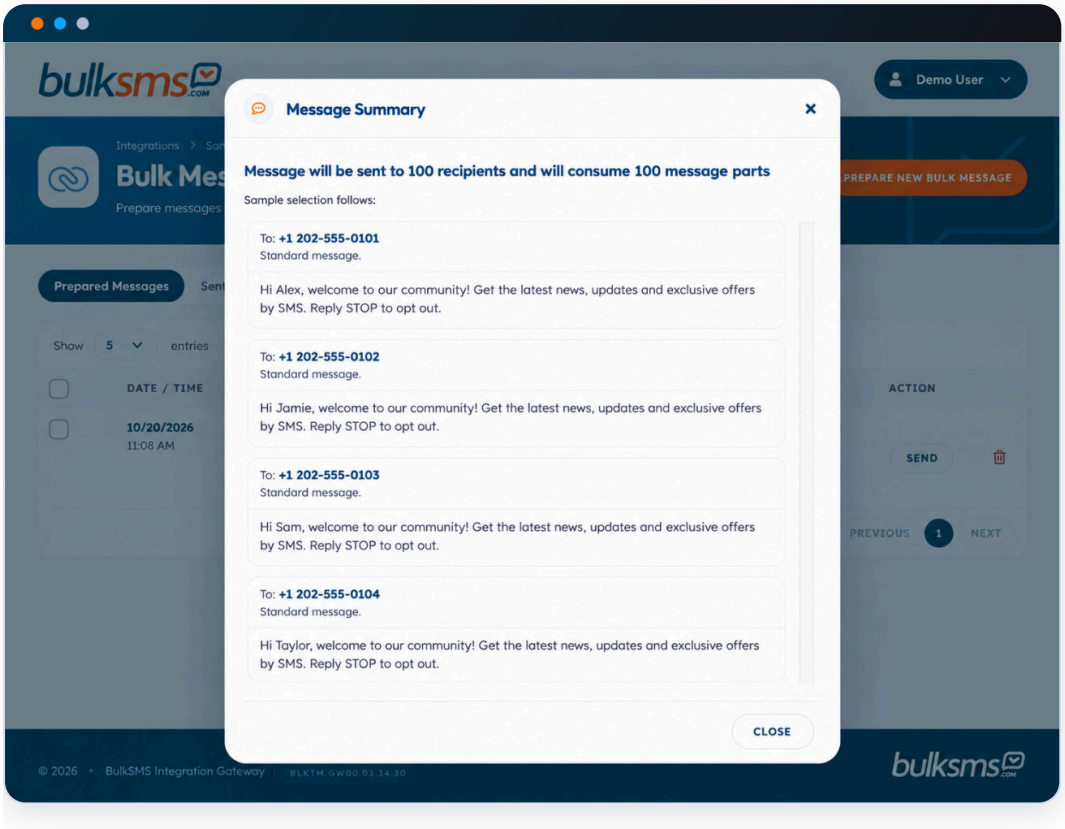


4 The integration collects the campaign's leads and contacts and lists the message under **Prepared Messages**. When it shows **Ready to Send** you can preview it, send it, or delete it with the bin icon.

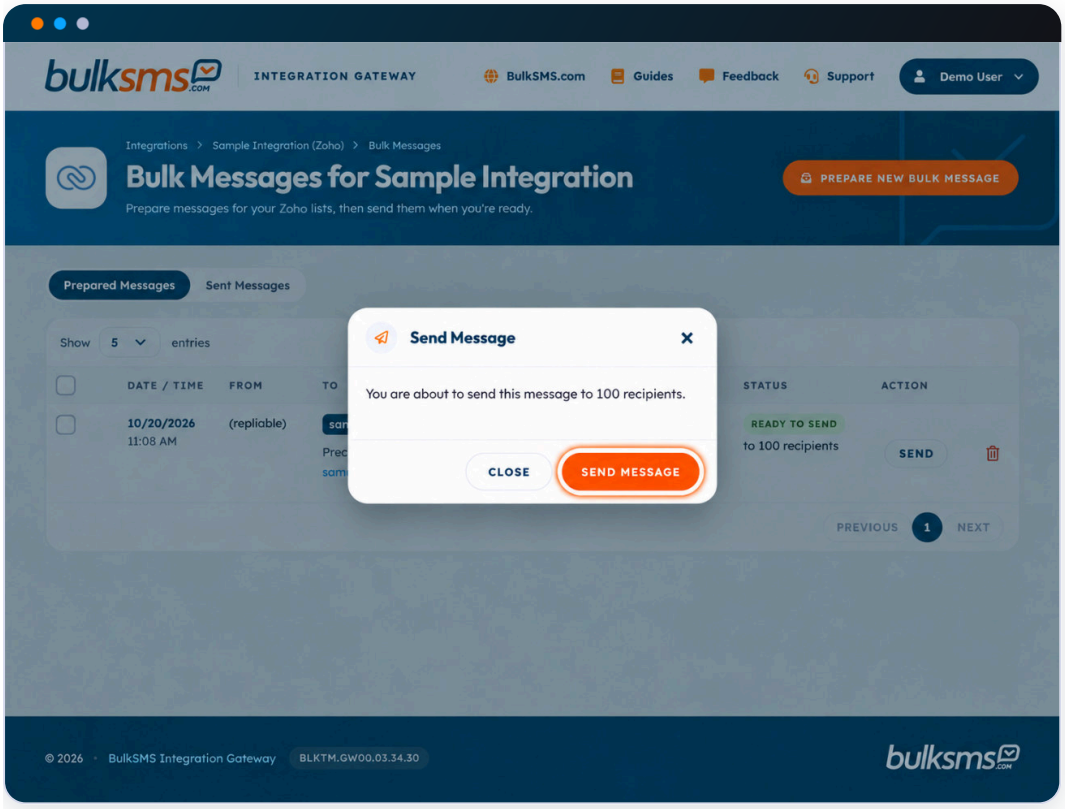


Preview and send

Click **Preview sample** to see how the message looks for a sample of up to 100 recipients, with each person's tokens filled in. The summary also shows how many recipients and message parts the send will use.

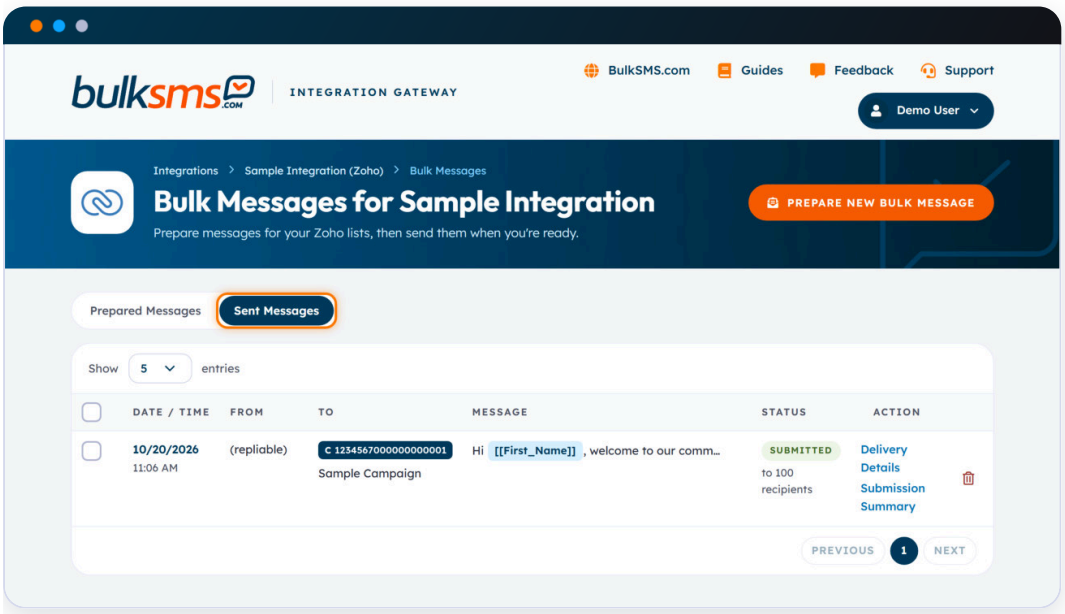


When you're happy, click **Send** and confirm with **Send Message**.



Track your message

Sent messages move to the **Sent Messages** tab. Click **Delivery Details** to see what happened to each message, or **Submission Summary** for totals, including anyone who was skipped.



08 Sending Tips

Who receives a bulk message

- **Every lead and contact in the campaign** receives the message—the integration doesn't check Zoho opt-out fields, so keep your campaigns clean.
- Messages go to the field chosen in **Leads Phone Field** or **Contacts Phone Field**. **Auto** uses Mobile, or Phone when Mobile is empty.
- Duplicates aren't removed: two records sharing a number will both be messaged.

Phone numbers and country codes

Numbers are sent in international format. If a number in Zoho doesn't include a country code, the integration adds the country code from the message. **Force Country Code** on the Settings page changes when it is added. With a country code of 44:

NUMBER IN ZOHO	FORCE COUNTRY CODE OFF	FORCE COUNTRY CODE ON
`07700900123`	`447700900123`	`447700900123`
`7700900123`	`7700900123` (not valid)	`447700900123`
`12025550143`	`12025550143`	`4412025550143` (wrong)
`+12025550143` or `0012025550143`	`12025550143`	`12025550143`

! Force Country Code is **on** after you authenticate. The safest option is to store numbers in Zoho with a **+** and the country code (e.g. +44 7700 900123). Leave Force Country Code on only if all your contacts are in one country and their numbers are saved without a country code.

Message length

- One SMS holds up to **160 characters**, or **70** if the message contains Unicode characters such as emoji or some accented letters.
- Longer messages are sent in several parts, and each part uses credits. The Prepare screen shows an approximate character count and a **Long Message** warning with the number of parts.
- A message can't be sent if it reaches 10 parts or more—the **Continue** button stays disabled until you shorten it.

Tokens

Zoho tokens use the field's API name, exactly as Zoho spells it. The Tokens list shows Leads and Contacts fields together, with your custom fields under **Contacts Custom Fields** and **Leads Custom Fields**. Commonly used tokens:

TOKEN	INSERTS	TOKEN	INSERTS
`[[First_Name]]`	First Name	`[[Email]]`	Email
`[[Last_Name]]`	Last Name	`[[Mobile]]`	Mobile
`[[Full_Name]]`	Full name	`[[Phone]]`	Phone
`[[Salutation]]`	Salutation	`[[Company]]`	Company (leads only)

A campaign can include both leads and contacts, so use fields both have, or add a default. Lookup fields such as Account Name or Owner don't insert a plain name, so avoid them in messages.

If a record has no value for a token, it is skipped (First Name and Last Name are simply left blank). Smart token options let you control this:

OPTION	EXAMPLE	EFFECT
`:default=`	`Hi [[First_Name:default=there]]`	Uses "there" when the record has no first name.
`:if(>n)`	`[[First_Name:default=friend:if(>10)]]`	Uses the default if the value is longer than 10 characters.
`:if(unicode)`	`[[Last_Name:default=friend:if(unicode)]]`	Uses the default if the value contains Unicode characters, so the message stays at 160 characters per part.

Sender address

- **(repliable)** – people can reply, and replies come back to Zoho CRM.
- **A phone number** – people can reply to that number.
- **A name** (e.g. your brand) – people **can't reply**.

> **Opt-outs:** the Integration Gateway doesn't unsubscribe people who reply STOP, and bulk messages don't check Zoho opt-out fields. Handle opt-outs in Zoho CRM—for example by removing people from your SMS campaigns when they reply "STOP".

09 Troubleshooting

YOU SEE	WHAT TO DO
Next is greyed out on a new integration	Enter a **Default Country Code** first.
Zoho API Console is greyed out	Choose your **Domain** first.
“Please select a domain and try again”	Choose the Domain that matches your Zoho CRM address, then click **Authenticate**.
An error instead of “Successfully Authenticated” in the Zoho window	Check that the Client ID and Client Secret were copied in full, the Redirect URL was pasted into **Authorized Redirect URIs**, and the Domain is right. Then authenticate again.
“Please Authenticate to continue.”	Click **Authenticate** and finish signing in to Zoho.
“Zoho Server based client has been removed or modified. Please Re-Authenticate.”	The client was changed or deleted in the Zoho API Console. Enter the Client ID and Client Secret again (create a new client if needed) and click **Authenticate**.
“Special characters are not allowed.” (Integration Name)	Use only letters, numbers, spaces, hyphens and underscores, up to 40 characters.
“* Notification E-Mail is required.”	Enter a Notification Email before you click **Save Settings**.
Activity Updates is unticked when you return	Tick **Enabled** and click **Save Settings** to set the connection up again.
Send_SMS(widgetbulksms) isn’t in the workflow actions	Install the BulkSMS for Zoho CRM extension, and use a Leads or Contacts workflow rule.
“Please select a Campaign and try again.”	Choose a campaign under **To**.
“Message contains the following invalid token: …”	Check the token’s spelling, capitals and square brackets, or choose it from the Tokens list.
Continue is greyed out	Write a message, and check it is under 10 parts.
Recipients skipped: “MSISDN is invalid”	The record has no number in the chosen phone field, or the number isn’t valid once the country code is applied. See Phone numbers and country codes.
Recipients skipped: “Missing data for … token.”	The record has no value for a token in your message. Add a default, e.g. `[[First_Name:default=there]]`.

You can download the list of skipped recipients, with the reason for each, from the Prepared Messages table.

Questions

We're here to help you every step of the way.

Please email **support@bulksms.com** or visit **www.bulksms.com** for other contact options.

Please be sure to mention **your username** and that you are using the **Integration Gateway for a Zoho CRM integration**.

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