



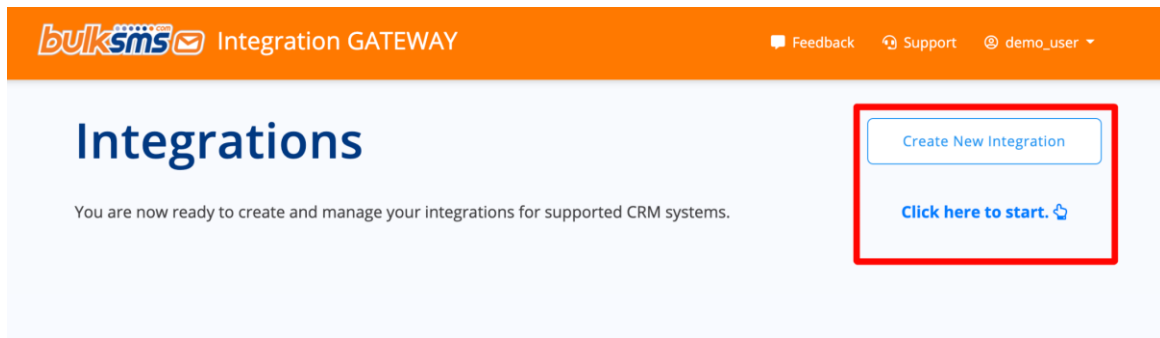
Integration Gateway

Quick Start Zoho Integration Guide

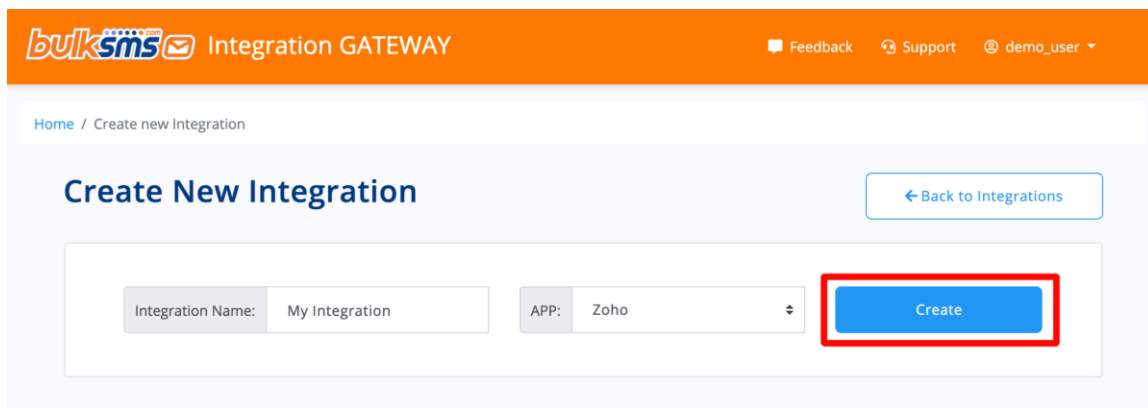


Setup Integration

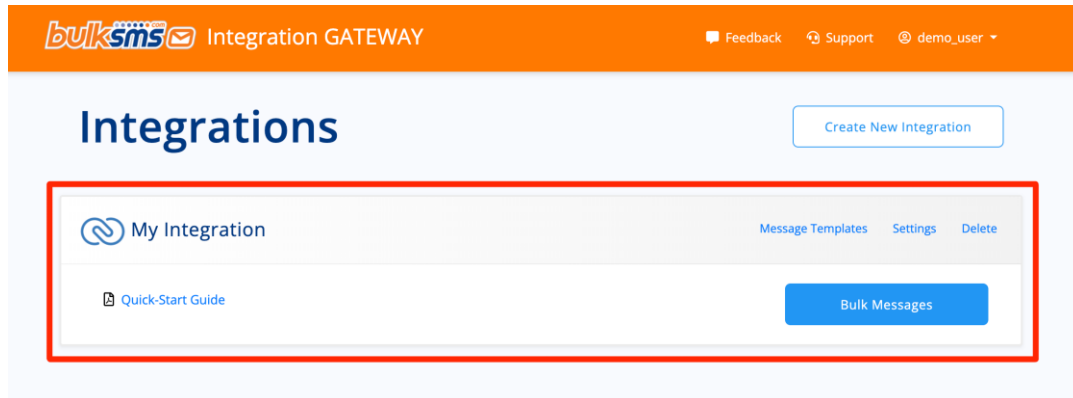
1. Signup/Login to BulkSMS Integration Gateway <https://www.bulksms.com/integration-gateway/>.
2. If you have already installed the **BulkSMS for Zoho CRM** app you can skip to Step 4 on page 3. If not, click "Create new Integration."



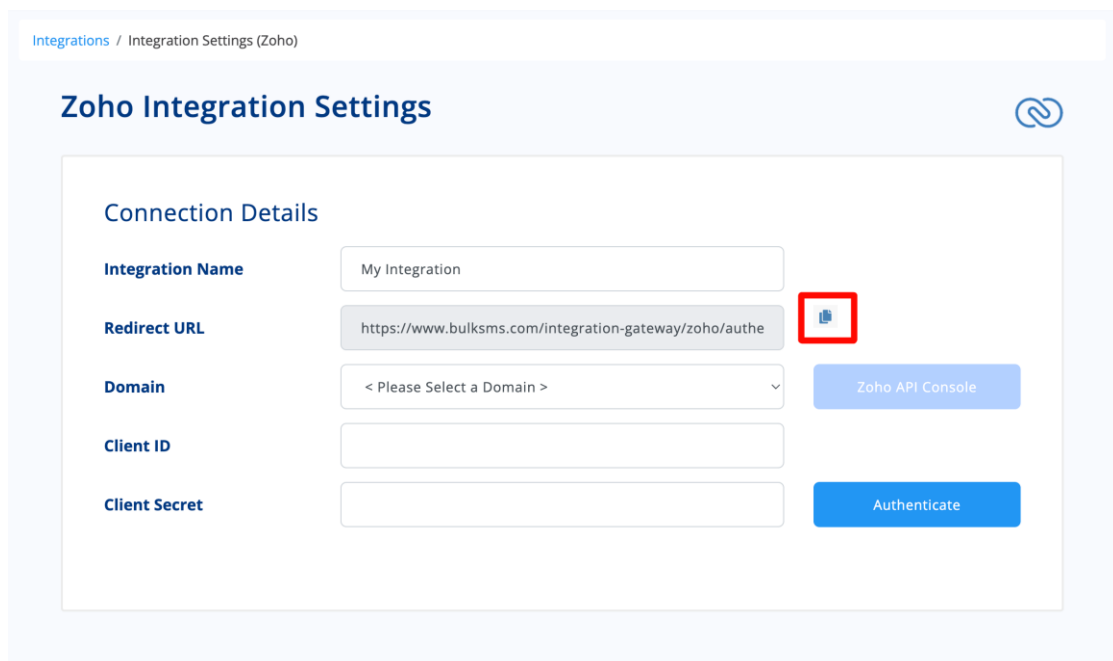
3. Enter your integration name and select Zoho from the App dropdown list, then click create.



4. Your new integration will now be visible on the home page. Click “Settings” to continue setup.





5. Click the copy button to copy the redirect URL that has been generated for your integration.





6. Select the domain that matches your Zoho Instance. This can be found in your Zoho Instance URL, for example: <https://crm.zoho.com/crm/org744213292/tab/Home/begin>.
7. Click "Zoho API Console" and login with your Zoho credentials.
8. Click on "Add Client".
9. You will be prompted with the following options, select "Server-based Applications".


Choose a Client Type

**Client-based Applications**
Applications that are built to run exclusively on browsers independent of web servers.
[CREATE NOW](#)

**Server-based Applications**
Web-based applications that are built to run with a dedicated HTTP server.
[CREATE NOW](#)

**Mobile-based Applications**
Applications that are built to run on smartphones and tablets.
[CREATE NOW](#)

**Non-browser Applications**
Applications that run on devices without browsers such as smart TVs and printers.
[CREATE NOW](#)

**Self Client**
Create credentials to test client-server handling for your applications.
[CREATE NOW](#)

10. Fill in the details below, and paste the URL you copied from your integration into "Authorized Redirect URIs"

Create New Client

Client Type

Server-based Applications



Client Name

BulkSMS

Homepage URL

<https://www.bulksms.com>


Authorized Redirect URIs

|



CREATE

11. Then click create. You will now see your Client ID & Client Secret. Copy and paste these into your integration.



BulkSMS

10 February 2022

Client Details

Client Secret

Settings

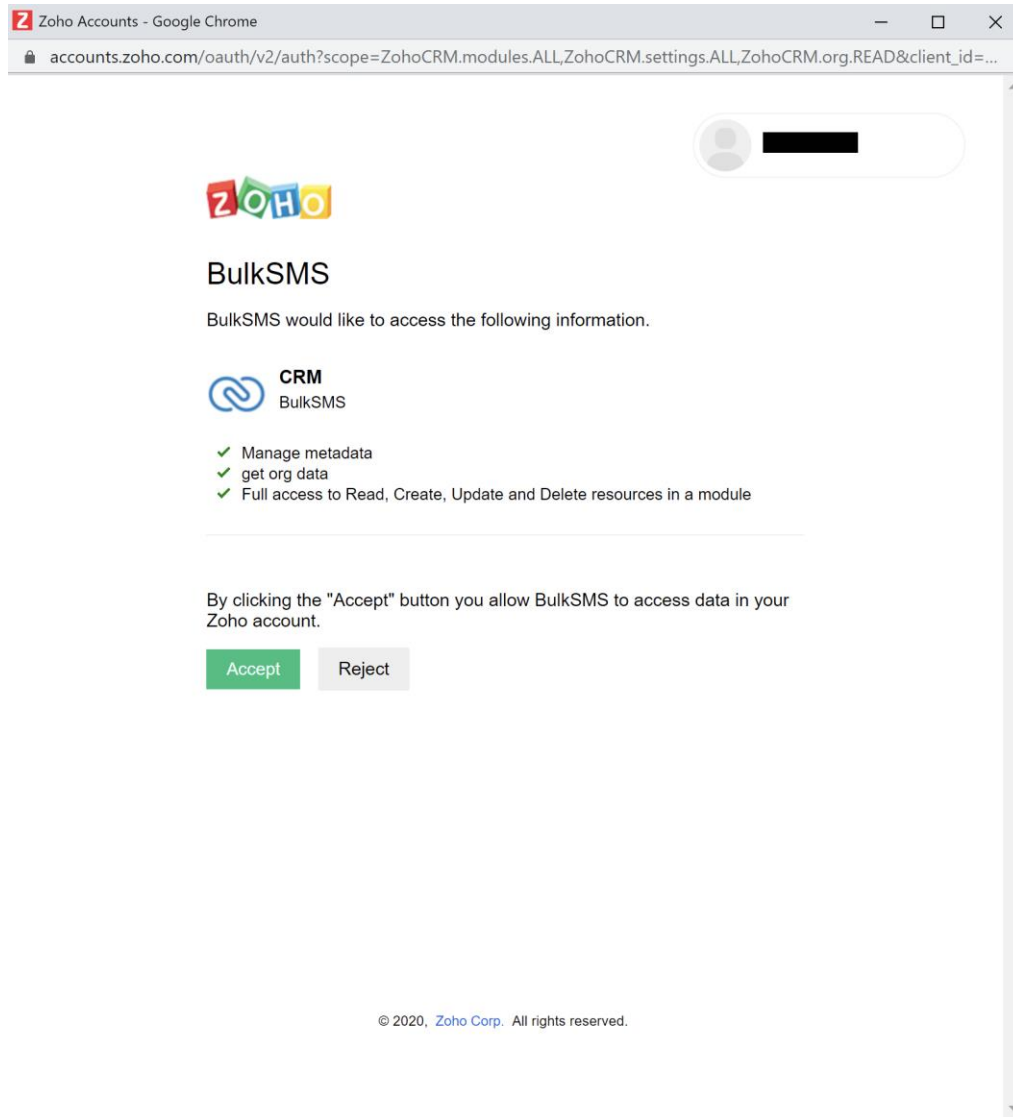
Client ID

1000.K0O9NJVUD2OEV3Y69IUV3JLSJD40ML

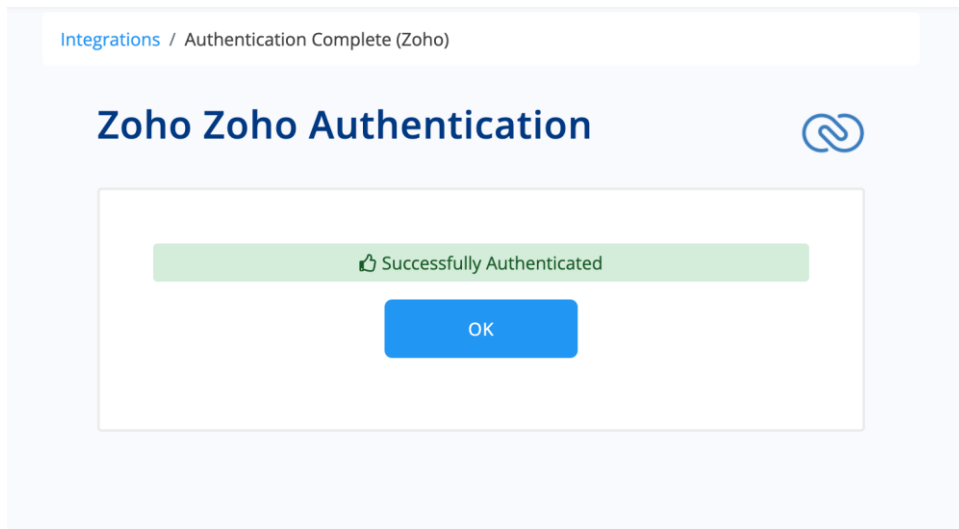
Client Secret

e7051ca8c111d3835673afe895252b6a01e52...

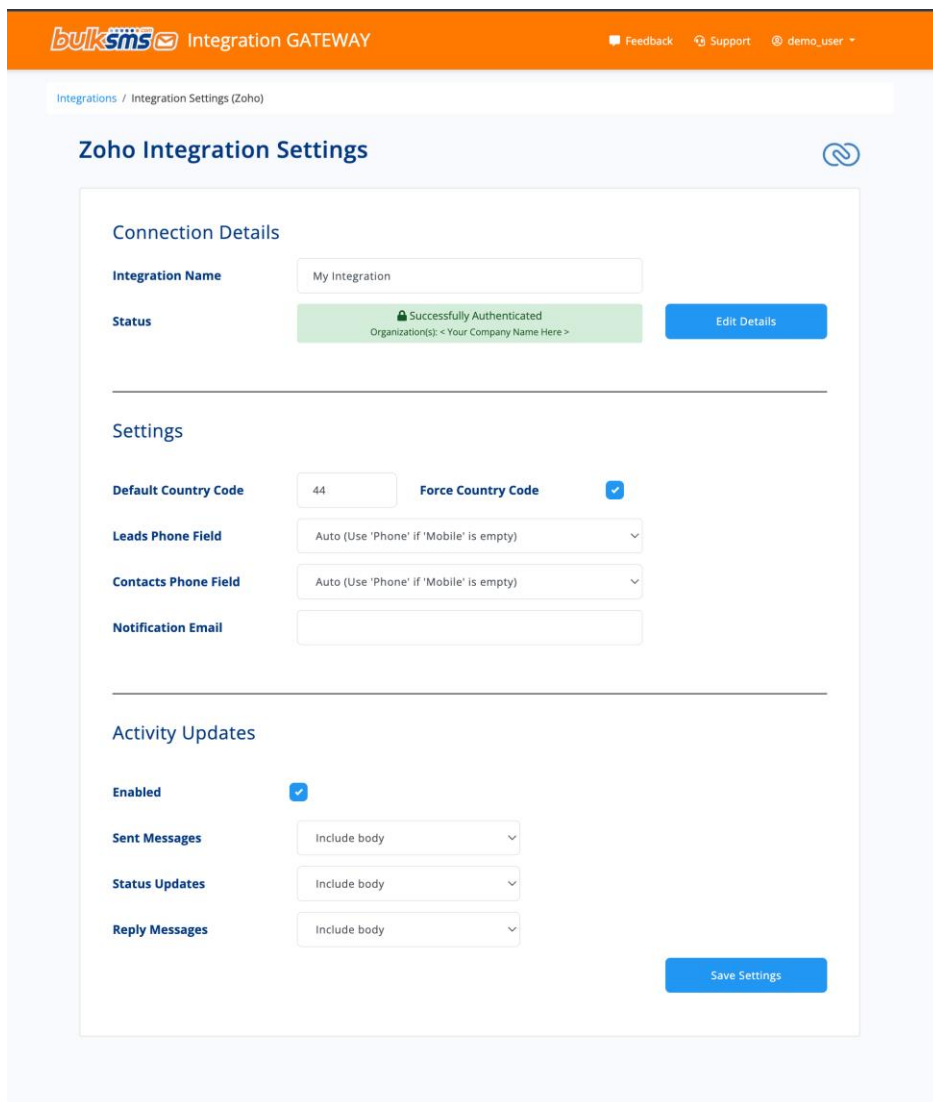
12. Once complete click Authenticate to continue. You will be prompted to login and authorize the connection.



13. Click OK when prompted to continue.



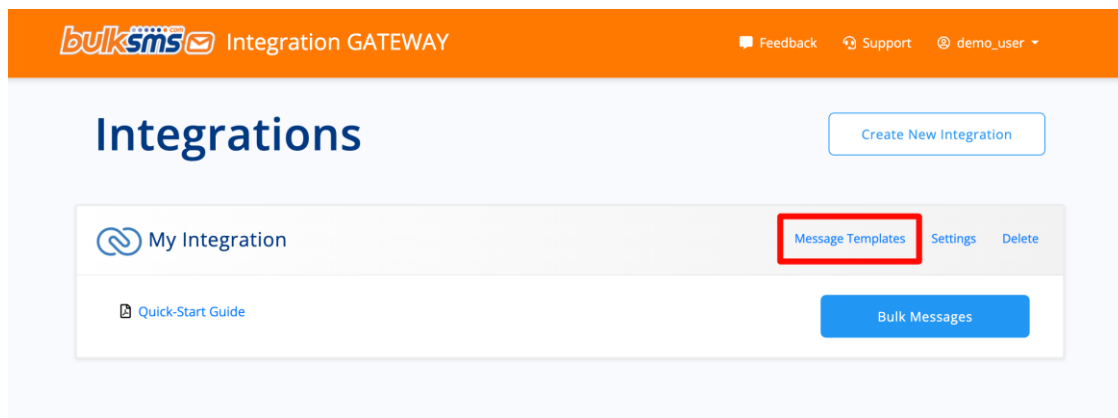
14. Your integration page will now reflect your authenticated status.



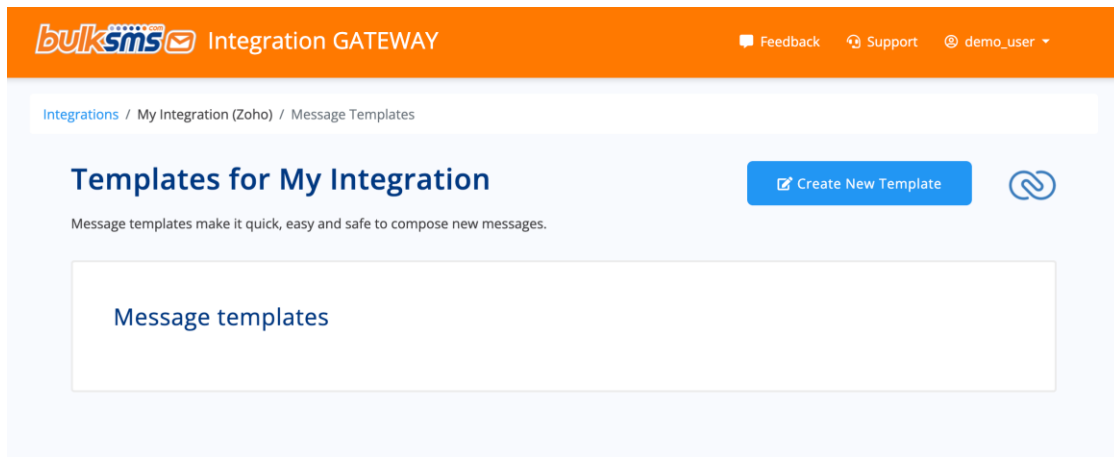
15. As part of the authentication process Activity Updates are enabled by default. This allows the Integration Gateway to push activity updates and replies back into your Zoho Instance.
16. You can map your primary Lead and Contact phone fields here to any field with the “Phone” data type. The default option is “Auto” which will first use the Mobile number and default to the Phone field if it is empty.
17. Your Zoho integration setup is now complete.

Message Templates

1. On the home screen select “Message Templates” for your integration.



2. Here you will be able to see, edit and delete all your existing templates. Click “Create New Template” to make a new one.



3. Below is an example of the screen for creating a new template.

4. Enter a unique name for your Template in the Descriptor field. Bear in mind no special characters are allowed, so try and keep it simple

Descriptor

keep-it-simple. a-z, 0-9, no spaces

5. Country Code will be the default country code for the template, this can be changed when preparing the message.

Sender Address

(reliable) ▼

Country Code

27

6. Tokens are fields pulled from the User's data allowing you to personalize the templates. This also includes Custom Fields created for Contact and Lead entities in Zoho.

Tokens

< Select a Token > ▼

Below is an example of the tokens available for Zoho.



The Template Body is the content of the message. Using the tokens, it should look something like this:

Create New Template

[← Back to Templates](#)

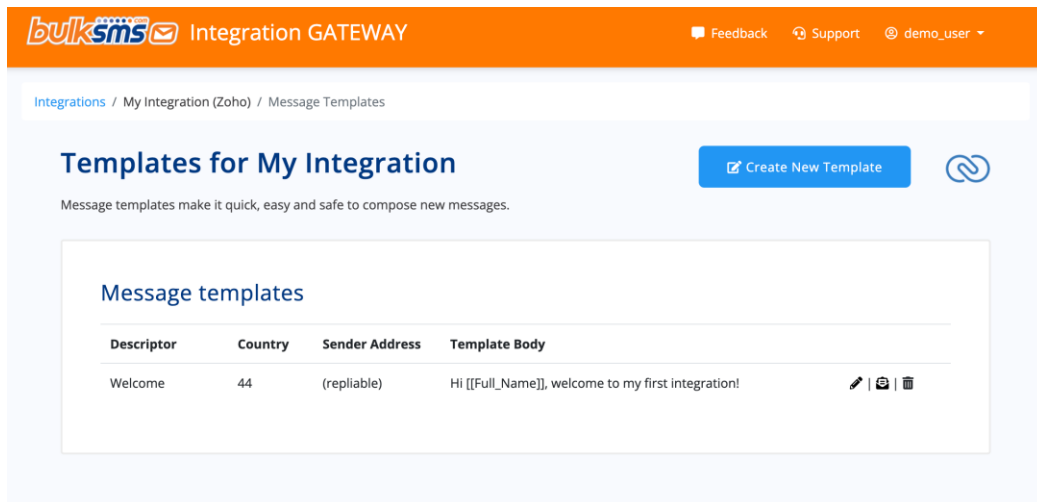


Templates can contain merge tokens, smart tokens and unicode characters. Long messages can be concatenated up to 10 message parts.

Descriptor	<input type="text" value="Welcome"/>		
Sender Address	<input type="text" value="(repliable)"/>	Country Code	<input type="text" value="44"/>
Tokens	<input type="text" value=" < Select a Token >"/>		
Template Body	<div><input type="text" value="Hi [[Full_Name]], welcome to my first integration!"/></div>		

[Create Template](#)

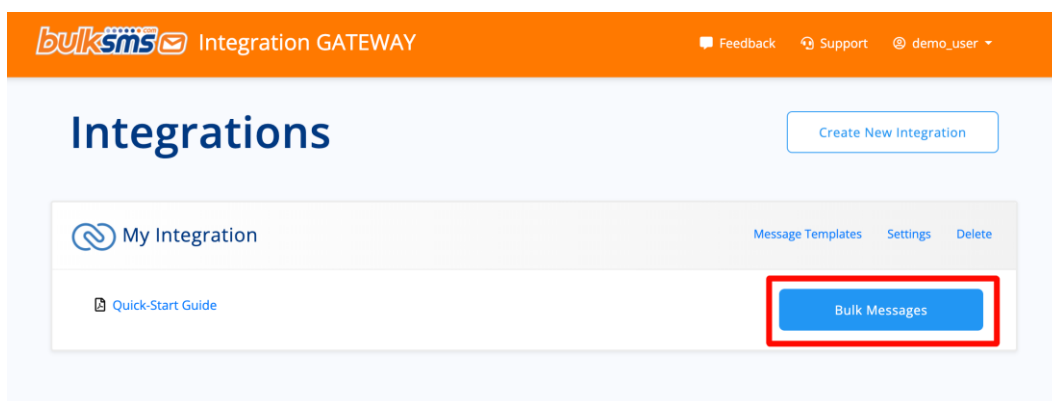
- When ready click "Create Template." Your new template will now be visible in the Message Templates table.



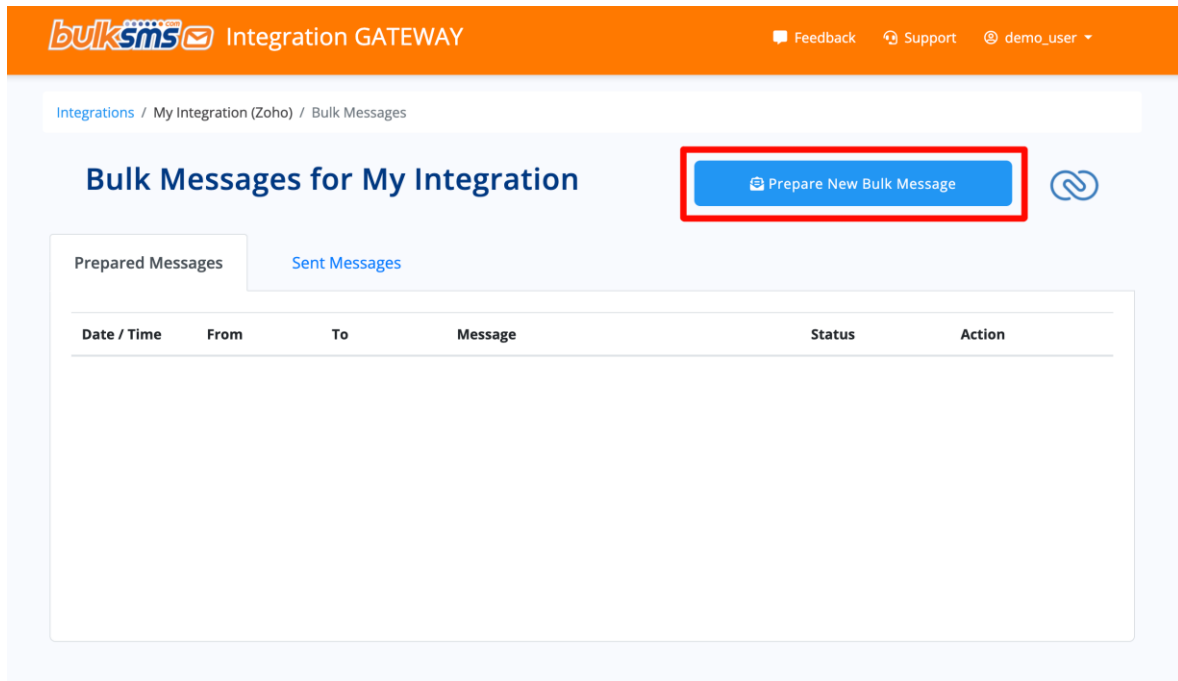
- The three action buttons are: Edit, Prepare Bulk Message and Delete.

Bulk Messaging

- In the home screen select "Bulk Messages" for your integration.



2. This is the Bulk Message Index for your integration. Here you will be able to view all prepared and sent messages. Select "Prepare New Bulk Message" to prepare your first message.



3. Select your Campaign

To

4. Next you can fill in a custom message or select from one of your templates. Doing so will fill in all the appropriate fields allowing you to make further changes before continuing.

Message Template

5. When everything is filled in simply click "Continue."

Prepare New Bulk Message

[← Back to Messages](#)



To

Demo Campaign

Message Template

Welcome

Sender Address

(repliable)

Country Code

44

Tokens

< Select a Token >

Message Body

Hi [[Full_Name]], welcome to my first integration!

approx 50

Continue

6. You will now be able to see your newly prepared message in the Bulk Message table.

From here you can now:

- Preview sample
- Send Message
- Delete Message

Integrations / My Integration (Zoho) / Bulk Messages

Bulk Messages for My Integration

Prepare New Bulk Message

Prepared Messages

Sent Messages

Date / Time	From	To	Message	Status	Action
2/10/2022 10:34 AM	(repliable)	<div>C 492626800001510001</div> Demo Campaign preview sample	Hi [[Full_Name]], welcome to my first integration!	<div>READY TO SEND</div> to 50 recipients	Send Message

Previous 1 Next

Preview Message

This will display an example of your message for up to 100 members. This just helps you make sure your message is formatted correctly before sending it off to all your campaign members.

Message Summary



Message will be sent to 50 recipients and will consume 50 message parts

Sample selection follows:

To: **111111012345**

Standard message of 53 characters.

Hi Jonn Doe, welcome to my first integration!

To: **11111123456**

Standard message of 50 characters.

Hi Mr. Bob Wilkonson, welcome to my first integration!

To: **11111143567**

Standard message of 45 characters.

Hi Jane Doe, welcome to my first integration!

Close

Send Message

You will be prompted to confirm before sending the message. Once you are ready simply click "Send Message."

Send Message

×

You are about to send this message to 50 recipients.

Close

Send Message

Once sent your message will be removed from the Prepared messages tab and can be found in the "Sent Messages" tab. Here you can view the Delivery details and the submission summary which will provide you with additional information regarding the Bulk Messages you have sent.

Integrations / My Integration (Zoho) / Bulk Messages

Bulk Messages for My Integration

Prepare New Bulk Message

Prepared Messages

Sent Messages

Date / Time	From	To	Message	Status	Action
2/10/2022 10:34 AM	(repliable)	C 4926268000001510001 Demo Campaign	Hi [[Full_Name]], welcome to my first integration!	SUBMITTED 50	Delivery Details Submission Summary 🗑️

Previous

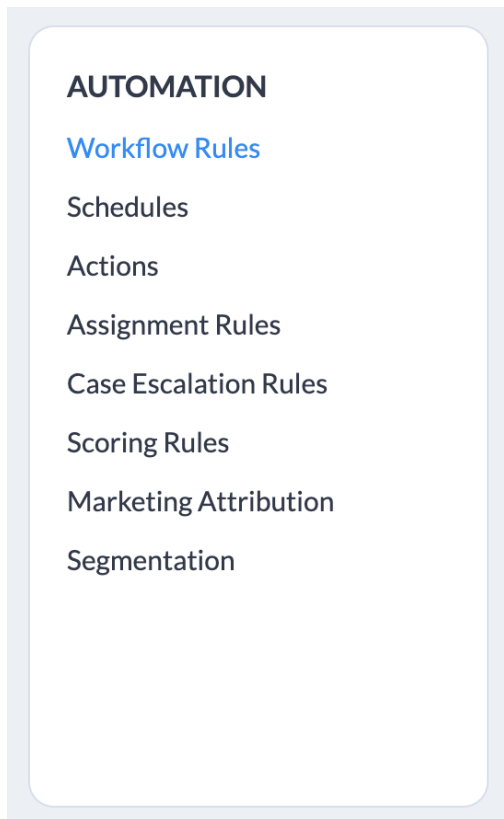
1

Next

Automations

This is step by step guide on setting up your first automaton in Zoho. For our example we'll send an automated SMS whenever a lead is created.

1. In Zoho navigate to the "Settings" button in the top right of the screen.
2. Under automation select "Workflow Rules".



3. Click "+ Create Rule" and select either the Leads module.

A screenshot of a "Create New Rule" dialog box. It contains three input fields: "Module" with a dropdown menu showing "Leads", "Rule Name" with the text "SMS on lead creation", and "Description" with the text "Demo automation rule". At the bottom right, there are two buttons: "Cancel" and "Next".

4. Set a trigger. In this case on Create.

← SMS on lead creation
@ Leads
Demo automation rule

WHEN

When do you want to execute this rule?

☒ On a record action
 ☐ On a Date/Time ⓘ
 ☐ Based on Score

☒ Create
☐ Create or Edit
☐ Edit
☐ Delete

Next

- Set one or more conditions. Here we will add a check to ensure the mobile number is not null or empty.

← SMS on lead creation
@ Leads
Demo automation rule

WHEN

This rule will be executed when a lead is **created**.

CONDITION 1

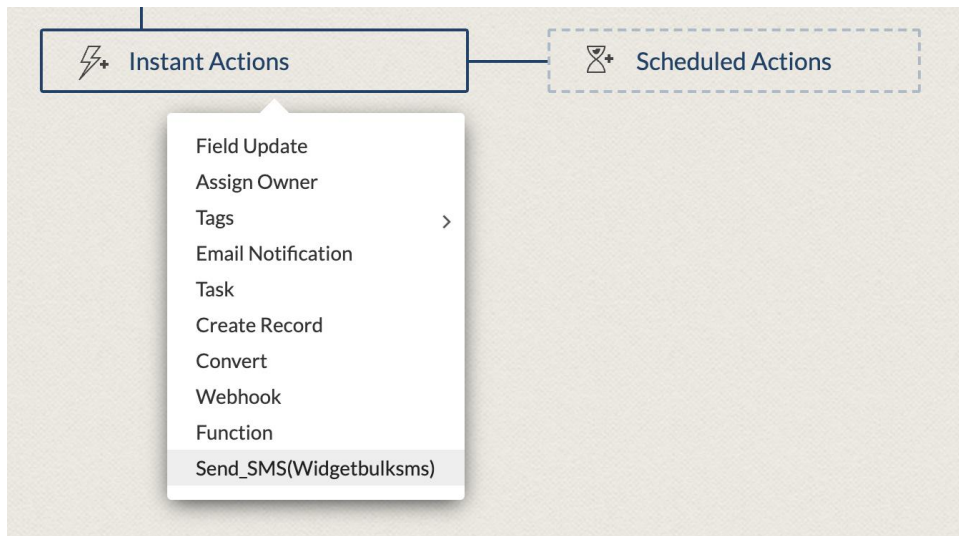
Which leads would you like to apply the rule to?

☒ Leads matching certain conditions
 ☐ All Leads

1 Mobile is not empty \${NOTEMPTY}

Next

- Select an Action. You can find the custom action “Send_SMS(widgetbulksms)” at the bottom of the list.



7. Setup your automated message using tokens for customization.

8. Once complete click save and give the custom action a title.

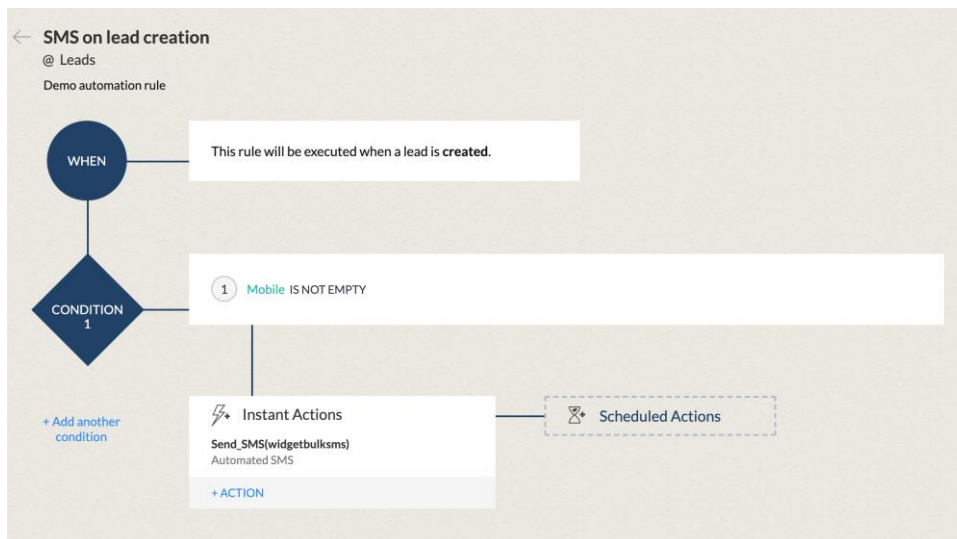
Send_SMS(widgetbulksms)

Name

Automated SMS

Save and Associate

- Once complete it should look like this. Click Save and you're done!



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

For any support or assistance, please e-mail 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 an **Zoho Integration**.