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# Integration with Zoho

Channels Supported - SMS

**User Manual**





## Integration Steps

In case the Kaleyra app is not available in the marketplace yet, you can install it from:  
<https://crm.zoho.com/market/installPrivatePlugin.do?portalName=kaleyra&nameSpace=kaleyrasms2&versionIndex=3485866000000378005>

Once published, the app will automatically be available for installation from the Marketplace.

1. Complete the installation steps as suggested on the Zoho platform. Make sure you authorize Kaleyra to access the data required for the integration to work:

The screenshot shows the Zoho CRM Marketplace interface. The top navigation bar includes 'CRM', 'All Tabs', and various modules like Home, Leads, Contacts, Accounts, Deals, Activities, Reports, Analytics, Products, Quotes, Sales Orders, and Purchase Orders. The left sidebar lists 'Setup' categories: General, Users and Control, Zoho Directory, Channels, Customization, Automation, Process Management, Data Administration, Marketplace (with 'All' selected), Zoho, Google, Microsoft, Developer Space, and Zia. The main content area shows 'All Extensions', 'Installed', and 'Updates' tabs. A dialog box for 'Kaleyra SMS' is displayed, asking for installation confirmation. The dialog includes the Kaleyra logo, a description: 'A cloud messaging platform that sends single and bulk SMS. Easy configuration by a single API Key.', and the question: 'Do you want to install the extension shared by plugins@kaleyra.com?'. Below this, 'Extension Details' are shown: Name: Kaleyra SMS, Version: 3. Two checkboxes are checked: 'I have agreed to the Terms of Service.' and 'I authorize Kaleyra SMS to access and process my data as required.'. A 'Continue' button is at the bottom right.



2. Choose the users that will have access to use the plugin:

The screenshot shows the CRM Setup page with the 'Setup' sidebar on the left. The main content area displays the 'Kaleyra SMS' installation configuration dialog. The dialog has a title bar with the Kaleyra logo and the text 'Kaleyra SMS' and 'A cloud messaging platform that sends single and bulk SMS. Easy configuration by a single API Key.' Below the title bar, there is a section titled 'Choose Users/ Profiles' with three radio button options: 'Install for admins only' (selected), 'Install for all users', and 'Choose profiles'. At the bottom of the dialog, there are two buttons: '< Back' and 'Confirm'.

3. Once the installation is complete, you can either sign up for a new account on Kaleyra or log in with your existing credentials.

The screenshot shows the CRM Setup page with the 'Setup' sidebar on the left. The main content area displays the 'Kaleyra SMS - Settings' page. The page features the Kaleyra logo at the top, followed by the heading 'Welcome to Kaleyra' and a sub-heading 'Enhance your business engagement capabilities by delivering real-time messages to millions of leads worldwide using the Kaleyra SMS extension for Zoho.' Below this text, there are two blue buttons: 'Register for free' and 'Log in', separated by the text 'OR'.

4. If you are a new user, you will have a \$1 credit added to your account and a trial sender ID. Please note, messages can only be sent to the registered number when on trial.



- Once logged in, you can see your account information, configurations (Sender IDs and Templates), and SMS Logs available for your account. You can contact our support team at [support@kaleyra.com](mailto:support@kaleyra.com) in case of any queries.

CRM | All Tabs | Home | Leads | Contacts | Accounts | Deals | Activities | Reports | Analytics | Products | Quotes | Sales Orders | Purchase Orders | ...

Setup

Search

General

Users and Control

Zoho Directory

Channels

Customization

Automation

Process Management

Data Administration

Marketplace

Developer Space

Zia

All Extensions | Installed | Updates

### Kaleyra SMS - Settings

Kaleyra Balance \$ 4.17

Account Details | Configurations | Logs | Contact Us | Disconnect Plugin

Name	Company	Number
Jane Doe	Kaleyra Integrations Demo	+ [REDACTED]
Email	KYC Status	Balance
[REDACTED]	AUTO-APPROVED	\$ 4.17
API Domain	SID (Security Identifier)	API Key
http://api.kaleyra.io/	[REDACTED]	[REDACTED]

! If KYC not done yet please [Submit KYC](#) to unlock features! KYC can be created from, [Billing > Preferences](#)

- You can click on 'Disconnect Plugin' to delink the integration and register or log in with a new account. Please note, disconnecting your plugin can disrupt active campaigns.

## Send SMS to Leads, Contacts, or Accounts

- Navigate to the Lead, Contact, or Account page and click on the 'Send SMS' button.

CRM | All Tabs | Home | Leads | Contacts | Accounts | Deals

Jane Doe - ABC Company

Send SMS

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Send SMS To Lead: Jane Doe

SMS Type: Marketing | Sender ID: [REDACTED]

Template: [REDACTED] | Recipient Number: Phone

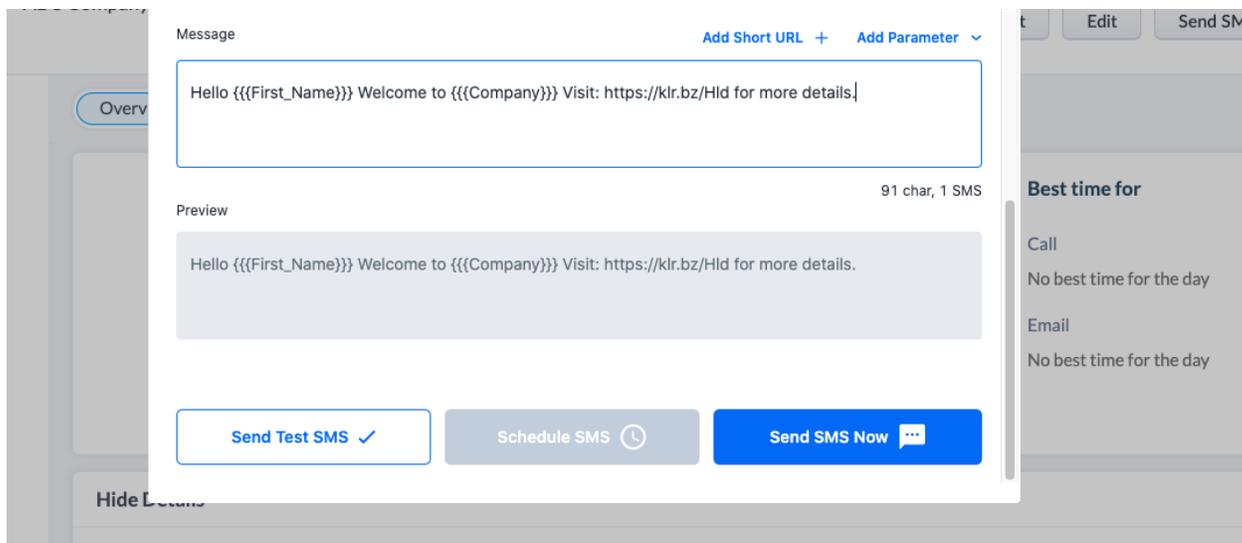
Message: [REDACTED]

Send Test SMS ✓ | Schedule SMS ⌚ | Send SMS Now 📄

- Users can choose SMS Type as Marketing, Transactional or Default depending on the regulations of their country. Registered Sender IDs are available to choose from in the list.



3. Zoho supports two types of recipient phone number fields - Mobile and Phone. Choose the one that's required.
4. While composing the message, users can include dynamic variables and include shortened URLs.



5. Users can send a test SMS to their own number (registered number), schedule the message for later, or send it immediately.

## Send SMS to a list of Leads, Contacts or Accounts

1. Users can select one or more leads, contacts, or accounts to send SMS in bulk.

