Integration with Zoho

Channels Supported - SMS

User Manual

kaleyra

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:

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

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

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.

5. 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 in case of any queries.

6. 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

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

2. 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.
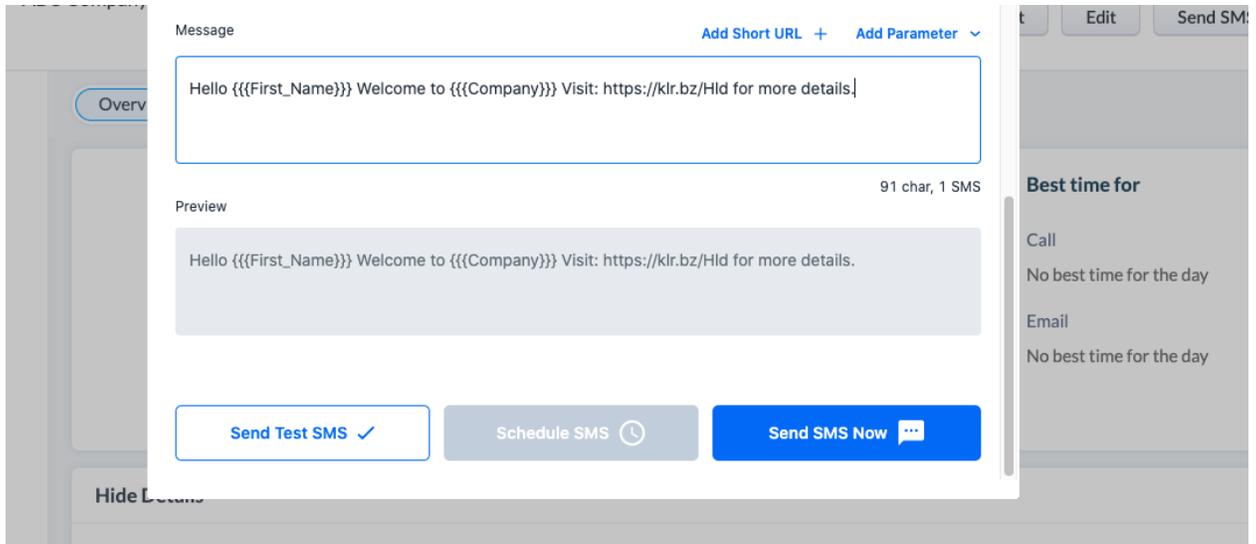
5. Users can send a test SMS to their own number (registered number), schedule the message for later, or send it immediately.

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.