
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 modal dialog for 'Kaleyra SMS' is open, displaying the extension details and a confirmation prompt.

Kaleyra SMS
A cloud messaging platform that sends single and bulk SMS. Easy configuration by a single API Key.

Do you want to install the extension shared by plugins@kaleyra.com?

Extension Details

Name	: Kaleyra SMS
Version	: 3

I have agreed to the [Terms of Service](#).

I authorize Kaleyra SMS to access and process my data as required.

[Continue](#)



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

The screenshot shows the CRM Setup interface. On the left is a sidebar with categories like General, Users and Control, Zoho Directory, Channels, Customization, Automation, Process Management, Data Administration, Marketplace, Developer Space, and Zia. The main content area is titled 'All Extensions Installed Updates'. A modal window titled 'Kaleyra SMS' is open, displaying the text: 'A cloud messaging platform that sends single and bulk SMS. Easy configuration by a single API Key.' Below this, there is a section '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 modal are buttons for '< 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 interface with the 'Kaleyra SMS - Settings' page. The sidebar is the same as in the previous screenshot. The main content area has a back arrow and the title 'Kaleyra SMS - Settings'. Below the title is the Kaleyra logo and the text: 'Welcome to Kaleyra. Enhance your business engagement capabilities by delivering real-time messages to millions of leads worldwide using the Kaleyra SMS extension for Zoho.' 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 in case of any queries.

The screenshot shows the CRM interface with a sidebar on the left containing navigation options like Setup, General, Users and Control, Zoho Directory, Channels, Customization, Automation, Process Management, Data Administration, Marketplace, Developer Space, and Zia. The main content area is titled 'Kaleyra SMS - Settings' and includes a search bar, tabs for 'All Extensions', 'Installed', and 'Updates', and a 'Kaleyra' account header with a balance of \$4.17. Below this is a table of account details:

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]

A notification at the bottom states: "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.

The screenshot shows a 'Send SMS' modal window overlaid on a CRM record for 'Jane Doe - ABC Company'. The modal includes a 'Kaleyra' header with a balance of \$4.17 and a 'Send SMS' section with the following fields:

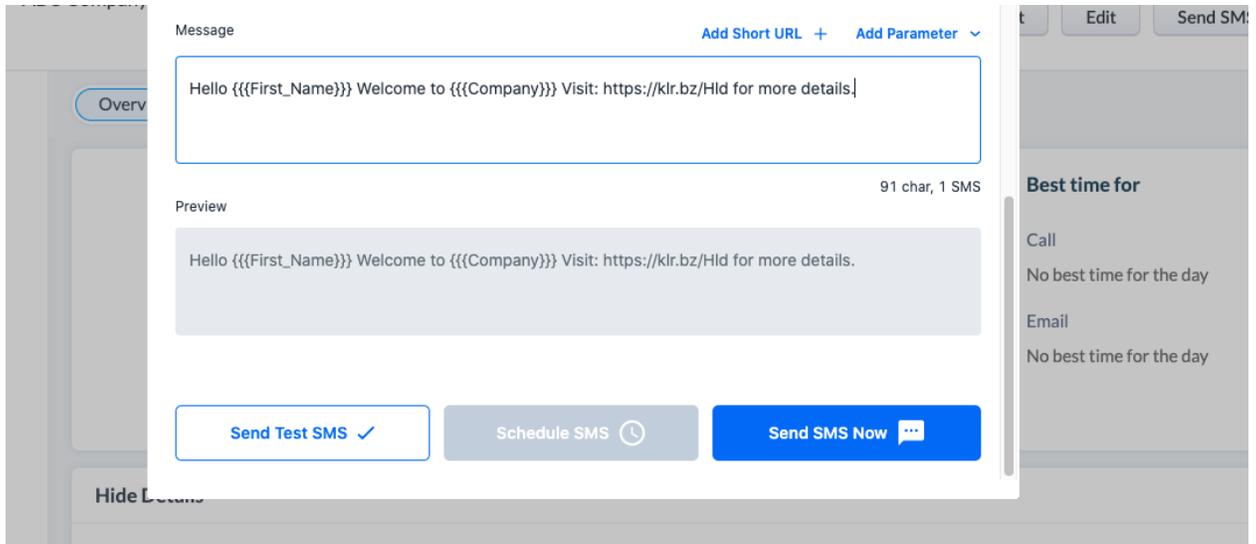
- Send SMS To Lead: Jane Doe
- SMS Type: Marketing
- Sender ID: [REDACTED]
- Template: [REDACTED]
- Recipient Number: Phone

At the bottom, there are buttons for 'Send Test SMS' (checked), 'Schedule SMS', and 'Send SMS Now'. The background shows the CRM interface with a 'Send SMS' button highlighted in a red box.

- 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.

