

HELP FILE

SMS Plugin for Zoho CRM



Table of Contents

Introduction	2
Installation Steps	2
Steps to Use	2
Sending Multiple Messages	2
Sending Single Messages	3
Accessing Reports	3
Support	4

Introduction

This file provides step-by-step instructions to install and use the plugin built by Message World Company, featured as MobiShastra on Zoho's marketplace, to send SMSs.

Message World Company known as MobiShastra Technologies is based in Saudi Arabia and licensed by CITC to provide SMS services to Organizations and Enterprises operating within the Kingdom.

The plugin can send SMSs using the mobile numbers from contacts on Accounts, Leads and Contacts modules on Zoho CRM and text message provided by the user.

Installation Steps

1. Fetch and install the MobiShastra SMS Integration plugin for Zoho CRM on Zoho's marketplace.
2. Check to agree to the terms of service and consent to authorization access that are necessary for the plugin to function. Click Continue to proceed with the installation.
3. Enter the username and password of your account on MobiShastra on the dialog that pops up next.

A Send Message button is seen on the Lead, Account and Contact modules to send multiple messages at once.

It is also seen within each record in these modules to send the SMSs individually.

Additionally, an SMS Report menu item is seen after the installation of this plugin.

Steps to Use

Sending Multiple Messages

1. Go to Leads, Accounts or Contacts modules
2. Select one or more records
3. Click Send button on top right.
The mobile numbers of the selected records are populated in the recipient field of the dialog that pops up.
4. Enter the text message and click Send.
The API's response is displayed below.

For testing, please use either of the following samples.

- i. Thank you for showing interest in our Company. Our team has received your details, and one of our representatives will reach out to you shortly. Meanwhile, feel free to explore our website for more information.
- ii. Hello, this is a reminder regarding the proposal shared with you. Please let us know if you have any queries or if we can assist you in moving forward.
- iii. Your deal has now moved into the negotiation stage. Our team will be working closely with you to finalize details and ensure all requirements are met.
- iv. Congratulations! Your deal has been successfully closed. Our onboarding team will contact you within 24 hours to get everything started.
- v. Dear Customer, this is a friendly reminder that your invoice is due. Kindly complete the payment to avoid any service interruption.

Sending Single Messages

1. Go to an individual record in to Leads, Accounts or Contacts modules
2. Click the Send button on top right.
The record's mobile number is populated in the dialog that pops up.
3. Enter the text message and click Send.
The API's response is displayed below.

For testing, please use either of the following samples.

- i. Thank you for showing interest in our Company. Our team has received your details, and one of our representatives will reach out to you shortly. Meanwhile, feel free to explore our website for more information.
- ii. Hello, this is a reminder regarding the proposal shared with you. Please let us know if you have any queries or if we can assist you in moving forward.
- iii. Your deal has now moved into the negotiation stage. Our team will be working closely with you to finalize details and ensure all requirements are met.
- iv. Congratulations! Your deal has been successfully closed. Our onboarding team will contact you within 24 hours to get everything started.
- v. Dear Customer, this is a friendly reminder that your invoice is due. Kindly complete the payment to avoid any service interruption.

Accessing Reports

1. Click the SMS Reports menu item.
2. Click the link in the resulting tab to view the Reports on Dashboard on MobiShastra's platform.
3. Enter your account's credentials if prompted.

Note - The OTP for 2FA is received both via SMS and Email on the registered mobile number and Email ID.

Support

Kindly reach out to your account manager or support desk from the links below, for clarifications if any.

Email: support@mobishastraksa.com

Website: <https://mobishastraksa.com/>