

SMS Integration with Zoho CRM

Using SMS Features in Zoho CRM End User Help Guide

Customer Help Guide: Sending SMS Messages Using Zoho CRM

Before You Start

To use the SMS features, make sure the following are set up:

[Yes] You are logged into your Zoho CRM account

[Yes] You have been assigned an App License by your admin

[Yes] Your CRM admin has already set up the sender number and workflows

[Stop] If you're missing any of the above, the SMS system won't work for you. Contact your admin if unsure.

STEP 1: Create a New Lead to Trigger SMS

1. In Zoho CRM, go to the Leads module.
2. Click on + Create Lead.
3. Fill out all required fields, especially Phone or Mobile Number.
4. Ensure the phone number is valid.
5. Click Save.

[Message] Behind the scenes, your CRM automatically schedules and sends the SMS when the lead is saved.

STEP 2: What Happens After You Save

Once you save the Lead:

- A record is created in the Schedule Message module.
- Another record is created in the Message History module.

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- The system attempts to send an SMS to the entered number.

STEP 3: How to Check if the SMS Was Sent

1. Open the Lead.
2. Click into View Mode.
3. Scroll to the Related Lists section.
4. Find the Message History panel.
5. Review message content, date, and delivery status.

Frequently Asked Questions (FAQs)

Q1: I created a lead but no SMS was sent. Why not?

- Phone field might be empty/invalid.
 - You may not have an App License.
 - Workflow conditions may not be met.
- > Solution: Check phone and ask admin.

Q2: Can I write or customize the SMS message?

- No, messages are template-based.
- > Solution: Contact admin for changes.

Q3: How can I see messages I've sent?

- Go to the Lead > Message History.

Q4: I see 'Failed' in status. What does it mean?

- Invalid number or carrier/DND issues.
- > Solution: Retry with a valid number.

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Q5: Do I have to send SMS manually?

- No. Its automatic.

Q6: Can I use this in other modules?

- Depends on admin configuration.

Q7: Who do I contact for issues?

- Your CRM Admin or Internal Support.

Summary

Create a Lead SMS sent automatically if conditions are met

Check Message History to view delivery

No manual sending needed fully automated.

For more queries, please contact: support@360degreeapps.zohodesk.com