MESSAGING & VOICE FOR BUSINESS



SMS Extension Zoho CRM User Guide

User Guide for Yuboto SMS Extension for Zoho CRM

Install the Yuboto SMS extension from Zoho Marketplace

In the confirmation pop-up, enter your API Key and click "Save" to connect your Yuboto account with your Zoho CRM account:

	Accounts Deals Activi	ties Reports Analy1 Ctails	Yuboto SM Send SMS with	S Widget Yuboto just by selecting your contacts or leads.	×	interprise IPCRADE Q & A + 🖲 💥 🔘
Setup						
	Name	Yuboto SMS Wi	Configure the extension se	ttings to activate this extension.		
	Version	22.0	Extension Settings			
General	Installed by	account@email.	Yuboto API Key	PWCyKAqoKLIoUIFkZC00ZmVhLWJiNWY1ZjU2NjBkOWRuOE	ND	
Users and Control	Installed date	21 May 2020				
Channels	Short description	Send SMS with		Cancel Save		
Customization	Status	Active				
Automation	Permission	Change Permissi	on			
Process Management						
Data Administration	Extension Settin	as				
Marketplace	Entenoion octain	90			Ø	
	Yuboto API Key					
Zoho						
Google	Installed Compo	nents				

How to Get Started (API Key, Top Up, Sender IDs Request)

To start using the Yuboto's SMS Extension, visit our Omni Messaging Platform "Octapush" and follow the steps below:

- Register at https://octapush.yuboto.com/en-US/Register.
- Find your OMNI API Key in "My Account" screen at "API Integration" section (use the "API Key Based64 Encoded") or request it from our support team at support@yuboto.com:

	=		Account Balance : € 4.61	Top Up 🛔 Test Account 🗸	EN 🗸
Create Campaign Now	Dashboard / My Account			My Account	
A Dashboard	Account Information		API Integration	My Subscriptions	
● Campaigns ✓ ● Sender IDs ✓ Qa Zavay Messages ✓ ■ Lists ✓ □ Landing Pages ✓ Lakt Reports ✓	First Name : Last Name : Email : Country : Mobile Number : SMS Service : Viber Service : Landing Page Service : Time Zone :	Test Account testacount@yuboto.com Greece 306901010000 Active Active Active (UTC+02:00) Athens, Bucharest	Below you can find the API Key which corresponds to your developer Account : Active API Key : 300300000000000000000000000000000000	My Involces Change Password Log Out (*	our API:
Exports	Edit Information				
API ~	Billing Information				
🧧 Tutorial 🗸 🗸	Company Name : First Name : Last Name : VAT Number : VAT Office : Address :			Privacy Terms of us	: Yuboto © 2020

		≡		Account Balance : €4.61 📑 Top Up 🔺 Test Account 🗸 📑 EN
Create Campaign	Now	Dashboard / My Account		
A Dashboard		Account Information		API Integration
📢 Campaigns	~	First Name :	Test	Below you can find the API Key which corresponds to your developer account, in order to integrate with our API:
🚽 Sender IDs	~	Last Name :	Account	Developer Account : Active API Key - XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
Q 2way Messages		Country :	Greece	API Key Base64 Encoded : 0000000000000000000000000000000000
Lists	~	Mobile Number : SMS Service :	306901010000 Active	
Landing Pages		Viber Service :	Active	
Lill Reports	~	Time Zone :	(UTC+02:00) Athens, Bucharest	
Exports		Edit Information		
API	~	Billing Information		
Tutorial	~	Company Name :		

• Top up your account balance or purchase the required credits to start sending messages:



• Visit the "SMS Sender IDs" page and request for the SMS Sender(s) that you want to have for your SMS campaigns by clicking the button "New SMS Sender ID Request":

		≡		Account Balance	: € 4.61 📑 Top Up 🛔 Test Account ~ 🛄 EN ~									
Create Campaign Now		Dashboard / Sender IDs / SMS Sender IDs												
A Dashboard		MS Sender IDs + New SMS Sender ID R												
😋 Campaigns	~	Show 10 v entries			Search:									
Sender IDs	*	Sender ID Name	Status	Submitted Date	Approval Date									
Viber Sender IDs				No data available in table										
SMS Sender IDs		Showing 0 to 0 of 0 entries			. K K B.									
Q 2way Messages														
🔳 Lists	*													
Landing Pages														
ull Reports	*													
A Exports														
API	~													

Keep in mind that in order to be able to request an SMS sender ID, you need first to add your account billing information.

Your SMS Sender ID can be up to 11 alphanumeric characters or 16 digits. If you want the recipients to be able to reply, please fill in the mobile number in international dialing format (eg. 3069XXXXXXXX for Greece).

<u>Warning</u>: You **need at least one** <u>approved</u> **SMS Sender ID**, in order to be able to send SMS messages. Your SMS Sender ID requests will be under review from the Octapush team.



Send Individual or Bulk SMS to Contacts and Leads

• Visit the Contacts or the Leads list and choose which contacts or leads you want to send SMS to:

O Contacts selected. Clear	Run Macro V Send Email Create Task Tags Send SMS with Y V		< 1 to 10
ER CONTACTS BY Q	Canvas View : Contacts - Canvas 🗸 Edit		Sort By 👻 🗌 Fit to Screen
ouched Records	Kris Marrier (Sample)	Account Owner	
Intouched Records	Phone : 555-555-5555 Email : krismarrier@gmail.com Mobile : 555-555-5555	Apris, 2020 03:29 AM	
Record Action	Account Name : King (Sample) Title : Quality Engineer Lead Source : Trade Show	APR 15	
Related Records Action	🛛 🚽 🕋 Sage Wieser (Sample)	Account Owner	
mail Status	Phone 555-555-5555 Email: sage-wieser@truhlar.uk Mobile: 555-555-5555 S		
Activities	Account Name : Iruniar And Iruniar (sample) Title : Product Engineer Lead Source : Advertisement		
lotes	Leota Dilliard (Sample)	Account Owner	
Deals	Phone 555-555-5555 Email: leota-dillard@hotmail.com Mobile 555-555-5555	APR 10	
eal Amount	Account Name: Commercial Press (sample) — Hue: Information systems manager — Lead Source: web Down		
eal Stage	Mitsue Tollner (Sample)	Account Owner Apr 15, 2020 03:29 AM	
eal Owner	Phone 555-555-5555 Email: tollner-morfong@gmail.com Mobile: 555-555-5555 A	APR 17	
al Closing Date	Account Name, Monong Associates (Sample) True, Internal Auditor Lead Source, Seminal Partner		
ampaigns	Simon Morasca (Sample)	Account Owner Apr 15, 2020 03:29 AM	
ontact Name	Phone 555-555-5555 Email: simoningchapman.com Moole: 555-555-5555	APR 14	
ontact Owner	Account value : Chapitan (Sample) - The : Information Systems wanager - Leed Source : Online Store		
reated By	Donette Foller (Sample)	Account Owner Apr 15, 2020 03:29 AM	
reated Time	Phone 555-555-5555 Email: Toller-donettegrin.com Mobile 555-555-5555	APR 17	
none	eccount roune , rimang uniterativita (ample) - rise - roune - ceso source - roune		
nail	🔽 🎆 Capla Paprocki (Sample)	Account Owner Apr 15, 2020 03:29 AM	
bile	Phone 555-555-555-555-555-555-555-555-555-55	TTAL APR 13	
count Name	Hocount sound - senter sitting delivere (Joinpre) - sitte - Jyacina Automatutor in - cono source - Externor sente		
tle	lamos Vanoro (Campio)	Account Owner	
	Total Count: 10		10 Records Per Page 👻 🤇 1 to 10

Home Leads Contacts #	Accounts Deals Activities Reports Analytics Products Quotes Sales Orders Purchase Orders Marketp	ace ···	
3 Leads selected. Clear	Run Macro v Send Email Create Task Tags Send SMS with Y_ v		< 1 to 10 >
LTER LEADS BY	Q Canvas View : Leads - Canvas 👻 Edit		Sort By 🚽 🗌 Fit to Screen
] Record Action] Related Records Action] Email Status	Christopher Maclead (Sample) Phone: 555:555:5555% Company: Rangori Of Florence Title: VP Accounting Lead Source: Cold Call	Account Owner Apr 15, 2020 03:29 AM	
Activities Notes Campaigns	Carlssa Kidman (Sample) Phone: 555:555:555 Filemat: carlssa-kidman@yahoo.com // Mobile: 555:555:5555 Company: Oh My Goodkrits Inc Title: Director of Sales Lead Source: Advertisement	Account Owner Apr 15, 2020 03:29 AM	
Lead Name Lead Owner Created Time	James Merced (Sample) Phone SSS 555 5555% Email james-merced@gmail.com Mobile 555 555 5555% Company Kwik Kopy Printing Title : Biostatistican Leed Source : Web Download	Account Owner Apr 15, 2020 03:29 AM	
Phone Email Mobile	Tresa Sweely (Sample) Prome 555-555-555 © Email: tresa-sweely@hotmail.com Mobile 555-555-5555% Company: Moriong Associates Title: Executive Secretary Lead Source: Seminar Partner	Account Owner Apr 15, 2020 03:29 AM	
Title Annual Revenue City	Felix Hirpara (Sample) Fore: 5555555555 End febrehrpara@cox.net Mobile: 555.555.5555 Company: Chapman Title: Computer Systems Analyst I Leed Source: Online Store	Account Owner Apr 15, 2020 03:29 AM	
Country Created By Email Opt Out	Kayleigh Lace (Sample) Priore S555555555 Email: kayleigh-laceByahox.com Model: 555.555.5555 Company: Printing Dimensions Title: Cost Accountant Lead Source: Partner	Account Owner Apr 15, 2020 03:29 AM	
Fax First Name Industry	Yvonne Tjepkema (Sample) Phone: 555:555:555% Email: yvonne-tepkema@hotnat.com Mobile: 555:555:555% Company: Grayson Title: Office Assistant III Lead Source: External Referral	Account Owner Apr 15, 2020 03:29 AM	
	Total Count: 13		10 Records Per Page 👻 🤇 1 to 10
Chetr Cherrets Contacts	Here is your Smart Chat (ChillSpace)		Ask Zia 💬 💟 Zia 😳 🖯

After you have selected the desired contacts or leads, click the button "Send SMS with Yuboto" which is located on top of the list.

Keep in mind that you have also available the "Send SMS with Yuboto" button, in each contact or lead page:

≡ Home Leads Contacts	s Accounts D	eals Activities	Reports A	nalytics Produc	s Quotes	Sales Orders	Purchase Orders	Marketplace		Enterprise Q 욘 스 + UPGRADE	8	K 🕕
Info										Send Email Edit Send SMS with Y V		$\langle \rangle$
Timeline Last Update : 5 day(s) ago	← R	Kris Marrie	er									^
RELATED LIST +	3	🗇 Add Tags										
Notes	Cont	act Owner	Kris Marrier Best time to Call * Today									- 1
Deals		Email	kris.marrier@ma	ail.com						No bescuine for the day		- 1
Open Activities		Phone	© 555-555-55	55								
Closed Activities		Mobile	© 555-555-55	55								
Invited Events	D	epartment										
Cases	SHOW DE											
Quotes	Notes											
Sales Orders		and a second				Ň						
Purchase Orders	Add a	note										
Involces												
Campaigns												
Social	Attachm	ents									Attach ~	<u> </u>
Reporting Contacts	No Attachi	ment										
LINKS +												
	Deals										~	•
Contes Contests	Here is your Small	rt Chat (Ctrl+Space)								Ask Zia 🚱 🗅	zia î	6 6

• In "Send SMS with Yuboto" pop-up, create your SMS message by filling in the mandatory fields and once your SMS message is ready for sending, click the button "Send":

Home Leads Contacts Ac	Send SMS with Yuboto	×	9 & 4 + E % 🌒
10 Contacts selected. Clear	Fill in the fields below in order to send your SMS messages:		<1 to 10 >
FILTER CONTACTS BY	то*	Message Expiration*	Sort By 📡 🗌 Fit to Screen
Touched Records	Mr. Kris Marrier 555-555 👻 🚯	1 Hours V 🟮	i i i i i i i i i i i i i i i i i i i
Untouched Records	Keep in mind that the mobile numbers need to be in international format (e.g.		
C Record Action	3069XXXXXX for Greece).		
Related Records Action	Sender*	SMS Type*	
Email Status	Sender Name 🗸	Simple SMS 🗸	
Activities	SMS Length*		
Notes	 160 characters SMS Long SMS (more than 160 characters) 		
🔲 Deals			
🗌 Deal Amount	Message		
🔲 Deal Stage	Personalization Tags	Below is an example of the SMS that will be sent to "Mr. Kris Marrier"	
Deal Owner	Full Name	v	
Deal Closing Date			
Campaigns	SMS Text.	0 —	
Contact Name	Hello {Full_Name}!		
Contact Owner		Sender Name	
Created By		Hello Mr. Kris Marrier!	
Created Time			
Phone	Characters Number of SMS		
Email	23 1		
Mobile			
C Account Name			
Title		Send a Test Send	
			10 Records Per Page 👻 🔰 1 to 10

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Below you will find explanations for each field of the SMS form:

- 1. <u>Field "To"</u>: Here are the mobile numbers that you have selected to send an SMS message.
- 2. <u>Field "Message Expiration":</u> Choose the time period that you want your message(s) to be expired. This means that during the period you choose, attempts will be made to send your message. Keep in mind that you are able to choose between 30 seconds and 3 days. Also, you are able to choose "No Expiration" if you wish your message(s) to not be expired.
- 3. <u>Field "Sender":</u> Choose from the drop-down the SMS Sender that you want for your SMS messages.
- 4. <u>Field "SMS Type"</u>: Here you need to choose the type of the SMS message that you want to send to the recipients. You have the option to choose between "Simple SMS" and "Unicode SMS". The difference is that with Simple SMS you can send 160 characters per SMS and also, you may use Greek capital characters, Latin characters, digits, spaces, and the following symbols: !@@#€\$%^"&*()_+-=,./?;:' but with Unicode SMS, you can send 70 characters per SMS and also you may use all the symbols and alphabets globally.
- 5. <u>Field "SMS Length"</u>: Here you need to choose the length of the SMS message that you wish to send to the recipients. You have the option to choose between "Basic SMS" and "Long SMS". This means that depending on what you choose to the "SMS Type" field, you need to select if you wish to send an SMS message up to or longer than 160 7bit characters or 70 Unicode characters.
- 6. <u>Personalization Tags</u>: Select the personalized information you want to add to your message. Keep in mind that in case the content of one of the used personalized parameters is empty for a contact, then the message will be sent with this piece of personalized information as blank.
- 7. <u>Field "SMS Text"</u>: Here you need to type your SMS message.
- 8. <u>Field "Characters"</u>: This is a disabled field which informs you about the number of characters you have typed in the SMS Text field.
- 9. <u>Field "Number of SMS"</u>: This is a disabled field which informs you about the number of SMS messages that you will send to your recipients based on the characters you have typed on the SMS Text field.

Send a test

If you wish to test your message before sending it to your recipients, you need to go to the bottom of the pop-up window and click on the button **"Send a Test"**:

Characters	Number of SMS	
23	1	
		🖈 Send a Test 🖉 Send

The pop-up window guides you on how to send your SMS to the mobile numbers that you wish for testing purposes. Keep in mind that you are able to send your test messages to more than 1 mobile number:



Warning: If your message includes personalization tags, keep in mind that they will not be replaced in the test message.

In the pop-up window below, you have to fill in the field with a mobile number (including the country code), in order to send your test(s). In case you wish to test your SMS message to more than one mobile number, you need to click on the "+" button in order to generate a new field to input the extra numbers. If you want to delete a field, you need to click on the red "X" button:



Once you are ready, click on the button "Send an SMS Test" and the test message(s) will be sent.

Check the delivery status of your SMS messages

• Visit the "Yuboto SMS History" module and check the delivery status of the SMS messages you have sent.

"Status" column in Yuboto SMS History grid

≡ Home Lea	ads Contacts Accounts Deals	Activities Reports Analytics Pro	ducts Quotes Sales	Orders Yuboto S	MS History Mark	etplace …		Enterpris UPGRAD	e Q & A + B 🛠 🕕
1 Yuboto SMS	History selected. Clear Run Macr	ro V Send Email Create Task	Tags •••						< 1 to 10 >
E. 🗉	YUBOTO SMS ID	SMS TEXT	STATUS	MOBILE	SENDER	SMS TYPE	LONG SMS	VALIDITY (MINUTES)	CREATED TIME
	589B2FA5-C96E- 4CA3-AA9A-' 92OCA82DE407	Hello Mr. Kris Marrier!	Delivered	5555555555	Sender Name	bit7	False	60	May 15, 2020 03:52 PM
	965DA695-A98B- 405C-998C- 78B4CF3B2821	Hello!	Delivered	5555555555	Sender Name	bit7	False	60	May 15, 2020 03:52 PM
	3B0E09CC-1550- 4501-94F2- 7BC4E5100554	This is a test!	Not Delivered	5555555555	Sender Name	bit7	False	60	May 15, 2020 03:52 PM
, D	A31F59C5-8996- 4758-926A- 060606BC6D18	Test	Delivered	5555555555	Sender Name	bit7	False	60	May 15, 2020 03:52 PM
	FDDE3EDF-0D11- 43D2-A414- 811F4E103878	SMS Test	Not Delivered	5555555555	Sender Name	bit7	False	60	May 15, 2020 03:52 PM
	2C3571EA-FEA4- 4E5A-984F- 80D10438E436	Test again!	Rejected	555555555	Sender Name	bit7	False	60	May 15, 2020 03:52 PM
	F839CEB0-A9CC- 4184-90CE- BD5B5D419D5C	Test	Delivered	5555555555	Sender Name	bit7	False	60	May 15, 2020 03:52 PM
Total Count: 17	,								10 Records Per Page 👻 🤇 1 to 10 >
Cives.	Here is your Smart Chat	(Ctrl+Space)							Ask Zia 🚱 🖸 Zá 🔞 😳

"Yuboto SMS Information" section in each message page

≡ Home	Leads	Contacts	Accounts	Deals	Activities	Reports	Analytics	Products	Quotes	Sales Orders	Yuboto SMS Histo	ory Marketpl	ace ***		Enter UPG	prise Q 2	38 ¢	+ 2) %	
Info														Send Email	Edit	Check Status	~	••••		>
Timeline Les	it Update : 113	36 AM	← 5	589	B2FA5	-C96E	-4CA3-	AA9A-9	920CA	482DE40	7									*
RELATED LI	IST	+		🔿 Add	Tags															
Notes			Yu	boto SMS	Owner	Account	Owner													
Attachment	s			Modi	ified By	Account	Owner													
Emails						Thu, 21 Ma	y 2020 11:36 AM	4												
Open Activi	tles		HIDE D	ETAILS A																
Closed Acti	vities																			
LINKS		+	Yubot	o SMS In	formation															
		e	Yu	uboto SMS	S ID 589	B2FA5-C9	6E-4CA3-AA	49A-			Yuboto	SMS Owner	Account Owner							
					920	CA82DE4	07					Modified By	Account Owner							
				Created	Ву Асс	ount Owne	er						Thu, 21 May 2020 11:36 AM							
				_	Fri, 1	5 May 2020 0	13:52 PM					Mobile	555555555							
				Sta	atus Del	vered						SMS Type	bit7							
				Sen	ider Sen	der Name						CMC Tout	Hollo Mr. Kris Married							
				Long S	MS Fals	e						SIMS TEXT	Tieno wii. Kiis wainen							
			Notes							~										
			Adv	l a note																
			Add	z a note																*
Chem		Contects	Here is your !	Smart Chat (C	tri+Space)											Ask Zia	Ê	20 260	Ö	Ð

Send automated SMS using webhooks

- Create workflow rule for Contacts/Leads module •
- Select "Webhook" option in "Instant Actions" Fill in the webhook information and settings
- ٠
- Save the workflow •