

MESSAGING & VOICE

FOR BUSINESS

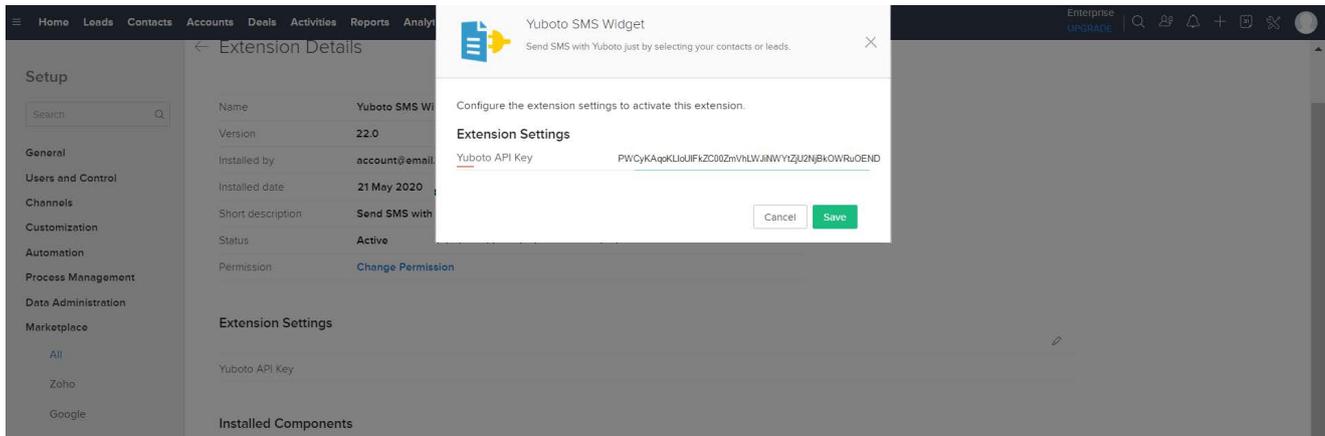


SMS Extension Zoho CRM User Guide

User Guide for Yuboto SMS Extension for Zoho CRM

Install the Yuboto SMS extension from Zoho Marketplace

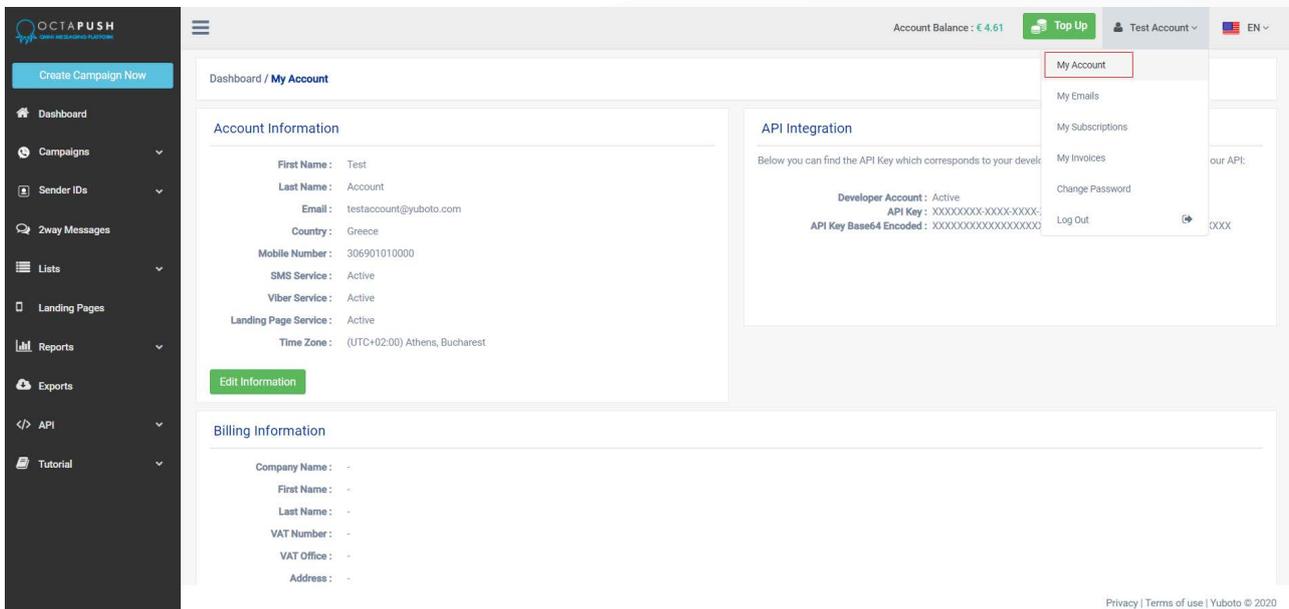
In the confirmation pop-up, enter your API Key and click "Save" to connect your Yuboto account with your Zoho CRM account:



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:



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:

The screenshot shows the CRM interface with the 'Contacts' tab selected. The top toolbar contains a 'Send SMS with Yuboto' button, which is highlighted with a red box. Below the toolbar, there is a list of 10 contacts, each with a profile picture, name, phone number, email, and account owner information. The 'Send SMS with Yuboto' button is located at the top of the list, and the 'Send SMS with Yuboto' button is highlighted in the top toolbar.

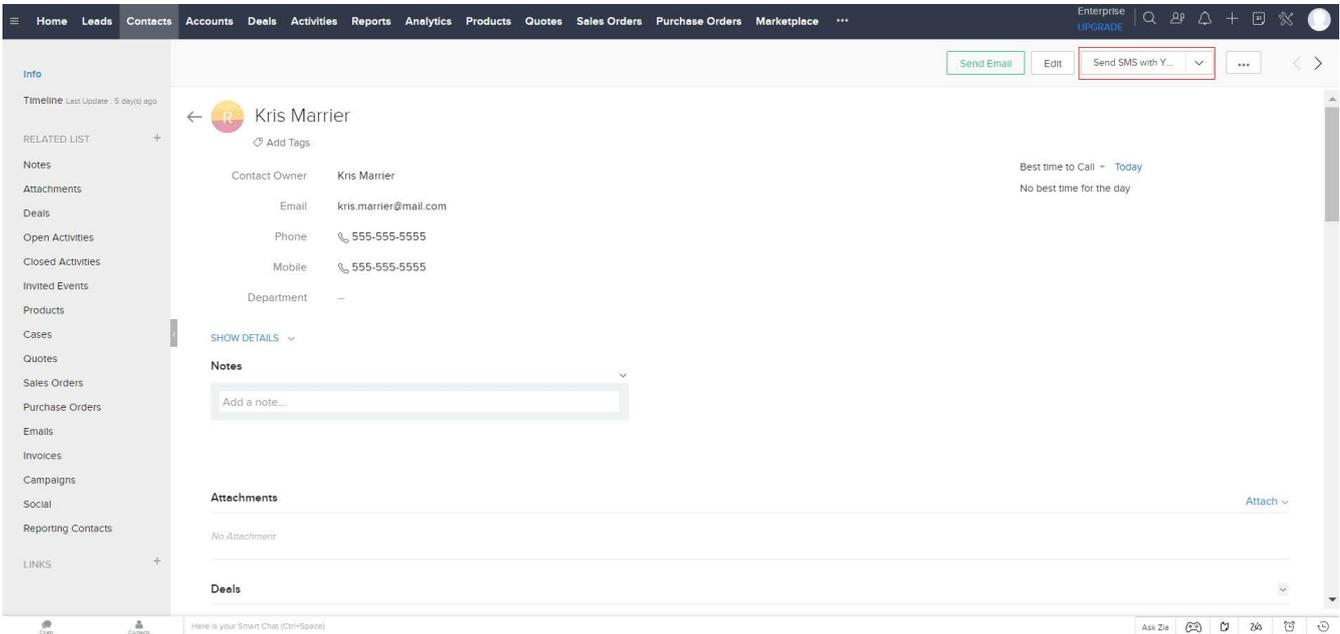
Name	Phone	Email	Mobile	Account Owner
Kris Marrier (Sample)	555-555-5555	krismarrier@gmail.com	555-555-5555	Account Owner
Sage Wieser (Sample)	555-555-5555	sage-wieser@truhlar.uk	555-555-5555	Account Owner
Leota Dilliard (Sample)	555-555-5555	leota-dilliard@hotmail.com	555-555-5555	Account Owner
Mitsue Tollner (Sample)	555-555-5555	tollner-morlong@gmail.com	555-555-5555	Account Owner
Simon Morasca (Sample)	555-555-5555	simonm@chapman.com	555-555-5555	Account Owner
Donette Foller (Sample)	555-555-5555	foller-donette@in.com	555-555-5555	Account Owner
Capla Paprocki (Sample)	555-555-5555	capla-paprocki@yahoo.com	555-555-5555	Account Owner
James Merced (Sample)	555-555-5555	james-merced@gmail.com	555-555-5555	Account Owner
Tresa Sweely (Sample)	555-555-5555	tresa-sweely@hotmail.com	555-555-5555	Account Owner
Felix Hirpara (Sample)	555-555-5555	felix-hirpara@cox.net	555-555-5555	Account Owner
Kayleigh Lace (Sample)	555-555-5555	kayleigh-lace@yahoo.com	555-555-5555	Account Owner
Yvonne Tjepkema (Sample)	555-555-5555	yvonne-tjepkema@hotmail.com	555-555-5555	Account Owner

The screenshot shows the CRM interface with the 'Leads' tab selected. The top toolbar contains a 'Send SMS with Yuboto' button, which is highlighted with a red box. Below the toolbar, there is a list of 13 leads, each with a profile picture, name, phone number, email, and account owner information. The 'Send SMS with Yuboto' button is located at the top of the list, and the 'Send SMS with Yuboto' button is highlighted in the top toolbar.

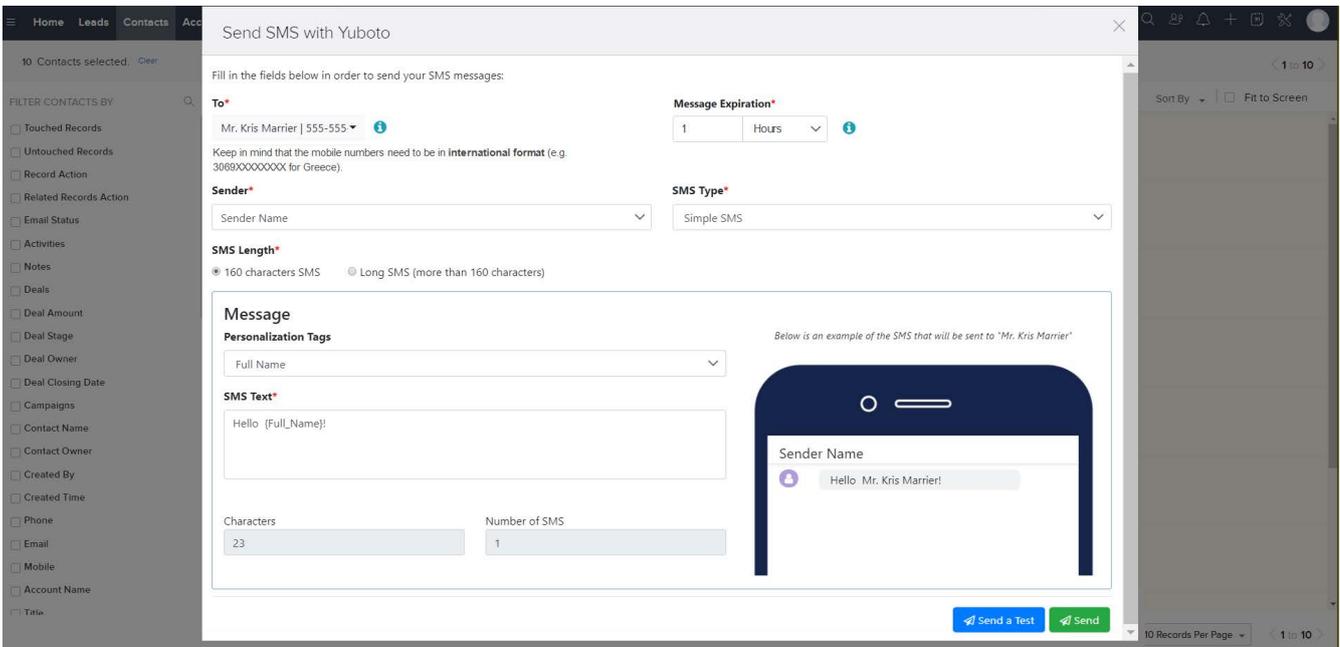
Name	Phone	Email	Mobile	Account Owner
Christopher Maclead (Sample)	555-555-5555	christopher-maclead@gmail.com	555-555-5555	Account Owner
Carissa Kidman (Sample)	555-555-5555	carissa-kidman@yahoo.com	555-555-5555	Account Owner
James Merced (Sample)	555-555-5555	james-merced@gmail.com	555-555-5555	Account Owner
Tresa Sweely (Sample)	555-555-5555	tresa-sweely@hotmail.com	555-555-5555	Account Owner
Felix Hirpara (Sample)	555-555-5555	felix-hirpara@cox.net	555-555-5555	Account Owner
Kayleigh Lace (Sample)	555-555-5555	kayleigh-lace@yahoo.com	555-555-5555	Account Owner
Yvonne Tjepkema (Sample)	555-555-5555	yvonne-tjepkema@hotmail.com	555-555-5555	Account Owner

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:



- 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":



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

1. Field "To": Here are the mobile numbers that you have selected to send an SMS message.
2. Field "Message Expiration": 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. Field "Sender": Choose from the drop-down the SMS Sender that you want for your SMS messages.
4. Field "SMS Type": 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. Field "SMS Length": 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. Personalization Tags: 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. Field "SMS Text": Here you need to type your SMS message.
8. Field "Characters": This is a disabled field which informs you about the number of characters you have typed in the SMS Text field.
9. Field "Number of SMS": 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.

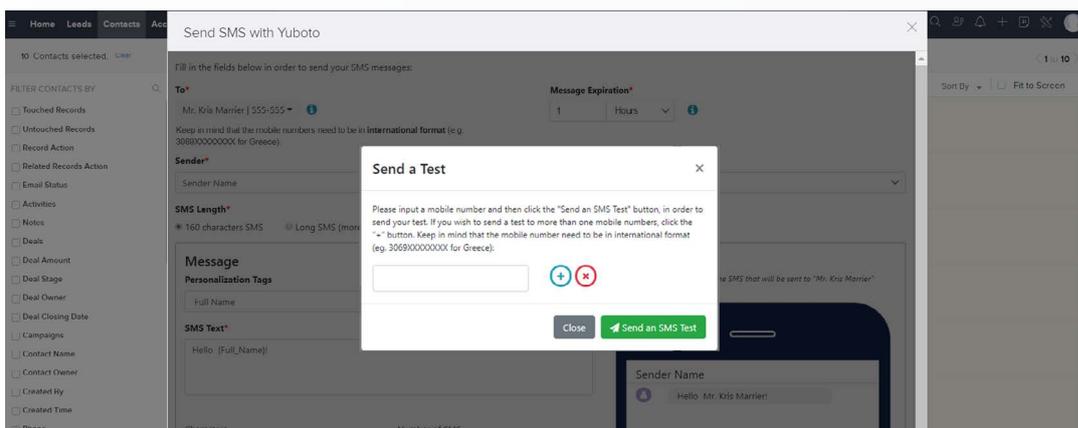
Send a test

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"**:



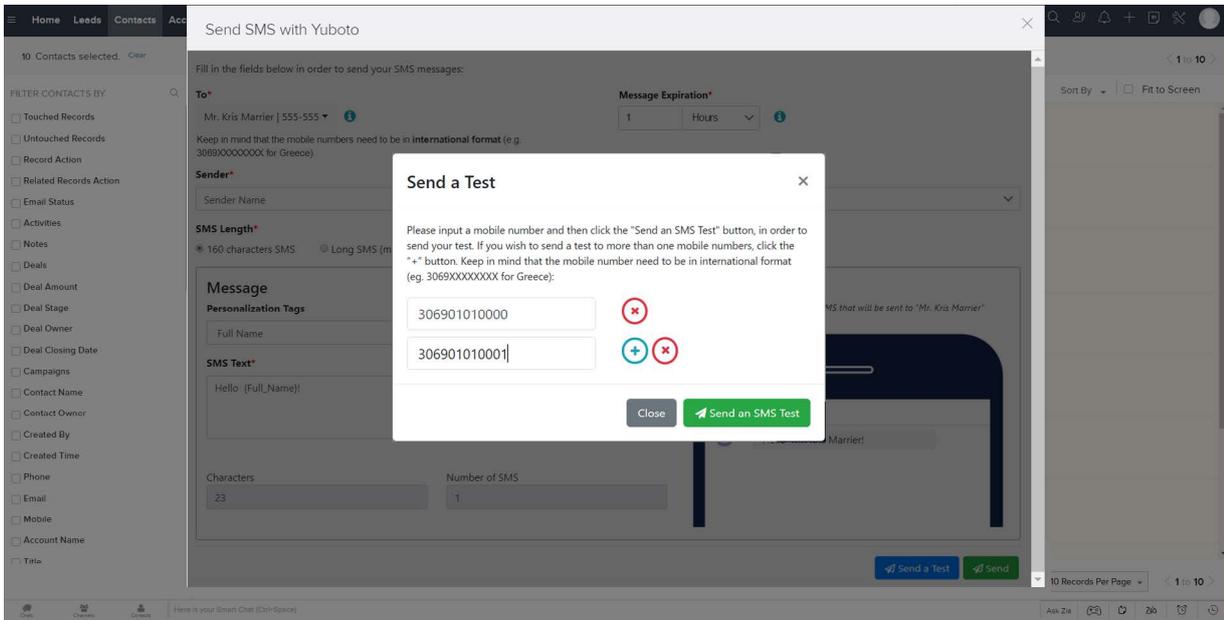
The screenshot shows a portion of the SMS form. At the top, there are two input fields: 'Characters' with the value '23' and 'Number of SMS' with the value '1'. At the bottom right, there are two buttons: a blue button with a paper plane icon labeled 'Send a Test' and a green button labeled 'Send'. The 'Send a Test' button is highlighted with a red rectangle.

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

	YUBOTO SMS ID	SMS TEXT	STATUS	MOBILE	SENDER	SMS TYPE	LONG SMS	VALIDITY (MINUTES)	CREATED TIME
<input type="checkbox"/>	589B2FA5-C96E-4CA3-AA9A-920CA82DE407	Hello Mr. Kris Marrier!	Delivered	5555555555	Sender Name	bit7	False	60	May 15, 2020 03:52 PM
<input type="checkbox"/>	965DA695-A98B-405C-998C-78B4CF3B2821	Hello!	Delivered	5555555555	Sender Name	bit7	False	60	May 15, 2020 03:52 PM
<input type="checkbox"/>	380E09CC-1550-4501-94F2-7BC4E5100554	This is a test!	Not Delivered	5555555555	Sender Name	bit7	False	60	May 15, 2020 03:52 PM
<input type="checkbox"/>	A31F59C5-8996-4758-926A-060606BC6D18	Test	Delivered	5555555555	Sender Name	bit7	False	60	May 15, 2020 03:52 PM
<input type="checkbox"/>	FDDE3EDF-0D11-43D2-A414-811F4E103878	SMS Test	Not Delivered	5555555555	Sender Name	bit7	False	60	May 15, 2020 03:52 PM
<input type="checkbox"/>	2C3571EA-FAA4-4E5A-984F-80D10438E436	Test again!	Rejected	5555555555	Sender Name	bit7	False	60	May 15, 2020 03:52 PM
<input type="checkbox"/>	F839CEB0-A9CC-4184-90CE-BD5B5D419D5C	Test	Delivered	5555555555	Sender Name	bit7	False	60	May 15, 2020 03:52 PM

“Yuboto SMS Information” section in each message page

The screenshot displays a CRM interface with a navigation bar at the top containing: Home, Leads, Contacts, Accounts, Deals, Activities, Reports, Analytics, Products, Quotes, Sales Orders, Yuboto SMS History, and Marketplace. The 'Yuboto SMS History' tab is active. On the right side of the navigation bar, there is an 'Enterprise UPGRADE' badge and several utility icons. Below the navigation bar, a left sidebar contains a menu with categories: Info, Timeline (Last Update: 11:36 AM), RELATED LIST, Notes, Attachments, Emails, Open Activities, Closed Activities, and LINKS. The main content area shows a message with ID 589B2FA5-C96E-4CA3-AA9A-920CA82DE407. A 'HIDE DETAILS' button is highlighted with a red box. Below this, the 'Yuboto SMS Information' section is displayed, containing the following details:

Yuboto SMS ID	589B2FA5-C96E-4CA3-AA9A-920CA82DE407	Yuboto SMS Owner	Account Owner
Created By	Account Owner	Modified By	Account Owner
Status	Delivered	Mobile	5555555555
Sender	Sender Name	SMS Type	bit7
Long SMS	False	SMS Text	Hello Mr. Kris Marrier!

At the bottom of the message page, there is a 'Notes' section with an 'Add a note...' input field. The bottom of the interface features a chat bar with the text 'Here is your Smart Chat (Ctrl+Space)' and a 'Ask Zo' button.

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
- Save the workflow