

# ZOHO CRM OMNICHANNEL COMMUNICATION ONBOARDING GUIDE

## Powered by Mitto

Add SMS, WhatsApp, and Viber messaging to Zoho CRM with Mitto's tailored omnichannel integrations: OmniConnect and Mitto SMS Extension for Zoho CRM.

### Before you start, make sure you:

1. Have a Mitto account and API key
2. Have a Zoho CRM account (any paid plan)
3. Know which channels you want to use: SMS, WhatsApp, Viber

**⚠ Note:** WhatsApp requires template approval and a verified business phone number.

#### STEP 1: DISCOVERY & CHANNEL SETUP

- Choose which channel(s) to enable: [SMS](#), [WhatsApp](#), or [Viber](#)
- Get expert advice on campaign use cases, audience targeting, and workflows
- Discuss template needs and use cases

#### STEP 3: TEMPLATE APPROVAL

- Submit pre-approved message templates
- Templates approved via Mitto's API
- Meta approval time: ~2 hours
- Use rich media, buttons, and variables to enhance engagement

#### STEP 2: INTEGRATION SETUP

- Install the [Mitto SMS Extension](#) or [OmniConnect](#) from the Zoho Marketplace
- Add your Mitto API Key and traffic account ID to connect your account or try sending SMS for free with Mitto's self-service [signup](#).
- Our team supports you in configuring sender IDs and channel settings
- Authorize and complete setup from the Extension Settings page

#### STEP 4: TESTING & LAUNCH

- Send test messages
- Ensure workflows and automation triggers are set
- Launch live campaigns or one-off sends via Contacts or Leads
- Monitor delivery and replies in real time

#### YOU'RE LIVE

Once completed:

- ✓ Integration is active
- ✓ Templates are approved
- ✓ Workflows are configured

You can now message your Zoho contacts directly from CRM — either automatically or manually — with SMS, WhatsApp, and Viber.

#### MAIN CAPABILITIES AFTER SET UP

- Bulk send to up to 500 contacts at once
- Enable two-way chats with conversation history
- Automate campaigns via Zoho Workflows
- Personalize messages with dynamic fields
- Track responses and get notified on replies

Need help?

Our team is here for you at every step—from setting up templates to planning campaigns and scaling with confidence. [Get in touch](#).