ZOHO – MITTO INTEGRATION

How To Get Started

Zoho CRM is a customer relationship management platform that allows businesses to manage their sales, marketing, customer support, and inventory from a single system. It supports more than 150,000 businesses across 180 countries.

With Mitto integration clients can send a single or multiple messages as well as to have a two-way chats:

- SMS messages
- Chat Apps messages (Viber and WhatsApp Business)
- Failover from Chat Apps to SMS if a message fails to deliver

PART 1

MITTO INTEGRATION

Prerequisites:

- Zoho account
- **Mitto account:**
    - **Guide – How to create Mitto account** and find API keys
    - **Guide** – **How to create WhatsApp templates**

Steps:

- Find OmniConnect for Zoho CRM inside the Zoho marketplace: https://marketplace.zoho.com/app/crm/omni-connect-for-zoho-crm-by-mitto
- Click on Install and once you are done you will see it under installed apps.

OmniConnect for Zoho CRM

OmniConnect for Zoho CRM integrates Mitto's SMS, WhatsApp, and Viber with Zoho for personalized messaging, enhancing customer engagement and CRM experience.

✕

Continue as
or Login as a different user.

Name	:	OmniConnect for Zoho CRM
Version	:	16

☐ I have agreed to the Terms of Service

☐ I authorize OmniConnect for Zoho CRM to access and process my data as required.

Continue to Install

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- Choose if you want to install it for admins only:

- Once it is installed it will be visible **under Installed apps** tab.

- The next step is the configuration through the Extension Settings part. For this step, please use the information provided to you by Mitto's Sales team and/or collect from Mitto Campaigns portal and click the save button at the end. Each field explained below.

Extension Settings   ×

Variable Name	Value
Mitto Password	Single Line
Mitto SMS Traffic Account Id	
Mitto Username	Single Line
Mitto Viber Traffic Account Id	
Mitto WhatsApp Traffic Account Id	
X-Mitto-API-Key	

Cancel   **Save**

- Message Sender – used as a sender ID for SMS, can be numeric or alphanumeric, in case you want to have 2way SMS enabled, you must buy virtual phone number -> contact Mitto' Sales

- Mitto SMS Traffic Account ID – SMS traffic account ID, can be found in Mitto Campaigns Portal on Preferences > Traffic Accounts page

ACCOUNT NAME	CHAT APPS TRAFFIC ACCOUNT ID	DISPLAY NAME	ACCOUNT TYPE	STATUS	ACTION
SMS - Campaign		Test account	Campaign	Active	🖉
Viber - Marketing	3308bf08-a139-48f9-97a3-fe66ed24e1bd		Viber	Active	🖉
SMS API	9091f64c-6353-4196-bf06-18dbe399ce0a		HTTP	Active	🖉
Viber - Notifications	7d60b25c-cfc9-44ea-b5e2-ab5bea369db2		Viber	Inactive	🖉

- Mitto WhatsApp Traffic Account ID – WhatsApp traffic account ID, can be found in Mitto Campaigns Portal on Preferences > Traffic Accounts page. In case you don't have WhatsApp Business Account, you can initiate the registration from ChatApps > Register WhatsApp page.

- Mitto Viber Traffic Account ID – Viber traffic account ID, can be found in Mitto Campaigns Portal on Preferences > Traffic Accounts page. In case you don't have Viber Business Account, you can initiate the registration from ChatApps > Register Viber page.

- X- Mitto-API- Key – ChatApps API Key, used to authenticate with Mitto's platform , can be found in Mitto Campaigns Portal under Preferences > API Keys page

  - Reminder: How to create Mitto account, register for chat apps and find API keys

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HTTP API Keys

Repath_sms:

....

Chat Apps API key

....

- Once you add all this information, in Zoho, open Extension details and click Authorize in Integrations section.

All Extensions   Installed   Updates

← Extension Details   Settings Uninstall Get Support

Name   OmniConnect for Zoho CRM
Version   50.0
Installed by   mittoagproducts@gmail.com
Installed date 10 Jan 2025
Short description OmniConnect for Zoho CRM integrates Mitto's SMS, WhatsApp, and Viber with Zoho for personalized messaging, enhancing customer engagement and CRM experience.
Status   Active
Permission   Change Permission

Integrations

Zoho CRM COQL Connector
New to Zoho CRM COQL Connector ? Signup   Or   Already have an account with Zoho CRM COQL Connector ? Authorize

- When you are done with the configuration, **click on Settings and run Setup** to allow the app to check all your credentials previously entered during the configuration.

Setup

Q Search

▸ General
▸ Security Control
▸ Channels
▸ Customization
▸ Automation
▸ Process Management
▸ Experience Center
▸ Data Administration
▾ Marketplace
   All
   Zoho

All Extensions   Installed   Updates

← OmniConnect for Zoho CRM - Settings

Setup Mitto Communication

Setup

✓ Connection Established
✓ Setting up Messages Webhook Completed
✓ Setting up SMS Completed
✓ Setting up Viber Messaging Completed
✓ Setting up WhatsApp Messaging Completed

You are all set! You can close this page.

- Go to **Chat preference settings** in top navigation to set up Traffic accounts and Sender IDs

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per each user to control who can use what. Under Chat user preferences it is visible who it is set up for that user.
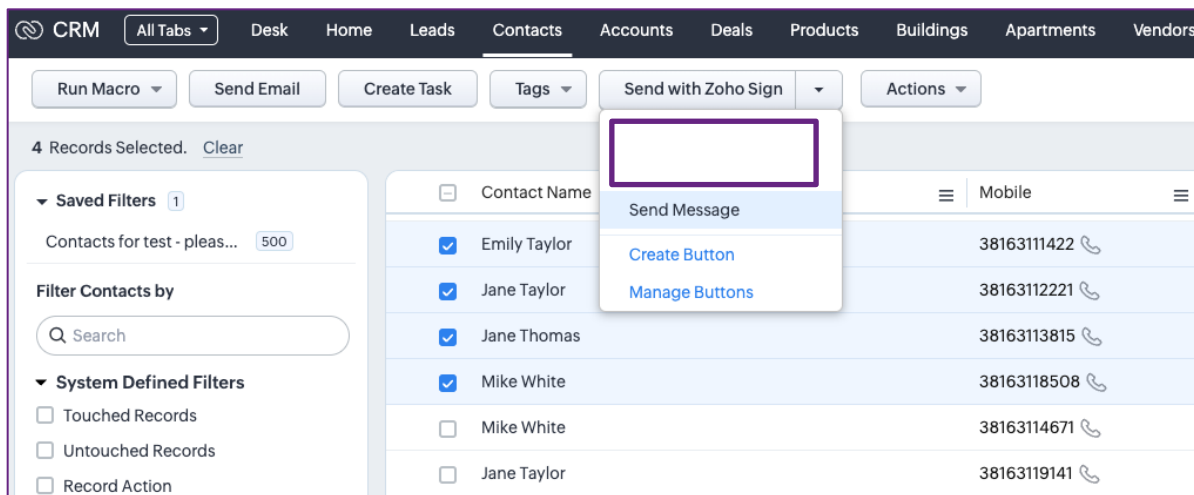
SENDING MESSAGES

BULK MESSAGES

Sending messages from Zoho CRM is **supported for Contacts, Leads** module.

- Once you are inside those, simply **choose one or more contacts (bulk)** to which you want to send a message. Click on **arrow icon and choose Send Message** from the menu. Please note: max number of selected contacts is 500.

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A menu of channels will pop up allowing you to choose between SMS, WhatsApp or Viber.

- **SMS** – simply type your message and hit Send.
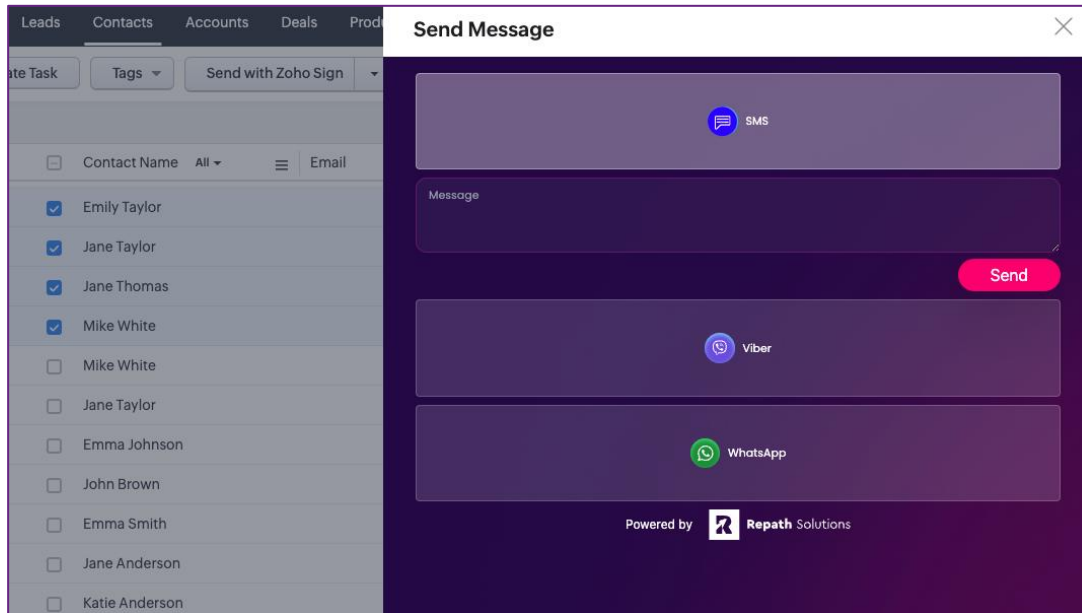
NOTE: Your SMS Sender ID is already defined in the Extension Settings part

- **Viber** – type your message and hit Send. If you wish, you can add a CTA (image URL, action, caption). You can also set a **failover message to SMS** if the mesage can not be delivered to Viber (e.g. person has no Internet or deleted the app).

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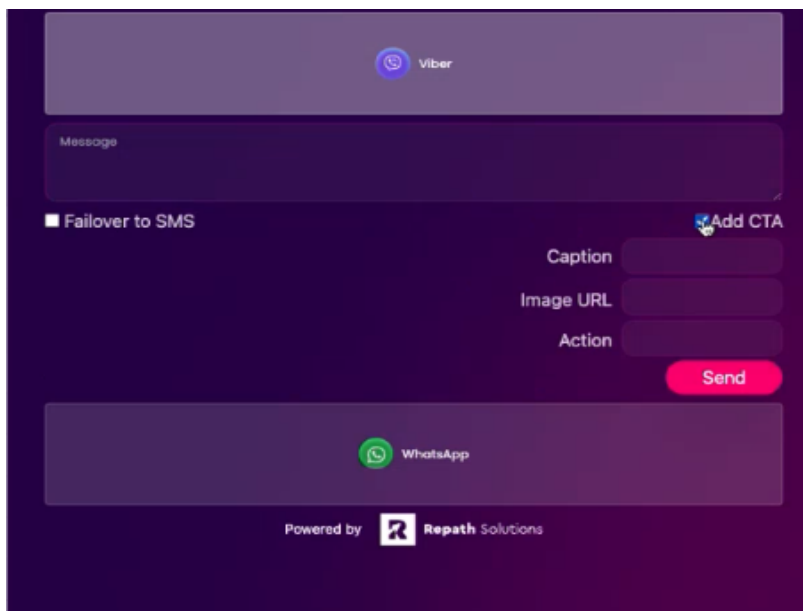
- **WhatsApp** – you can not type message at this point, you need to **choose between registered WhatsApp templates** and hit Send.
  - You can also set a **failover message to SMS** if the mesage can not be delivered to WhatsApp (e.g. person has no Internet or deleted the app).
  - You can **add Dynamic fields** for personalization depending on the data you save for your contacts and leads.

- To find out more about WhatsApp template please refer to <u>Meta's official documentation</u>.

  - To register a WhatsApp template, please consult with your account manager.

TWO-WAY MESSAGES (CHAT)

Sending two-way messages from Zoho CRM is **supported for Contacts and Leads** module.

Choose between **SMS, WhatsApp or Viber**.

- Once you are inside those, simply **find a contact, click on Chat for that person**.

	John Doe	johnd05@gmail.com	+38591123456 📞	+385911234567 📞	Chat Dev ▾
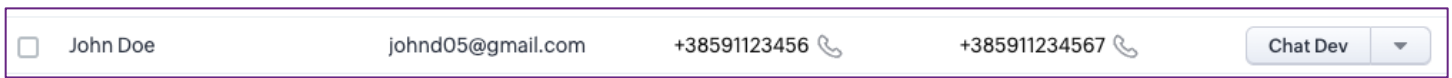
- A pop up will appear showing you **entire messaging history across all channels** for that specific person. Messages sent as a bulk action will also be visible here. You can filter conversations per channel by choosing one below.
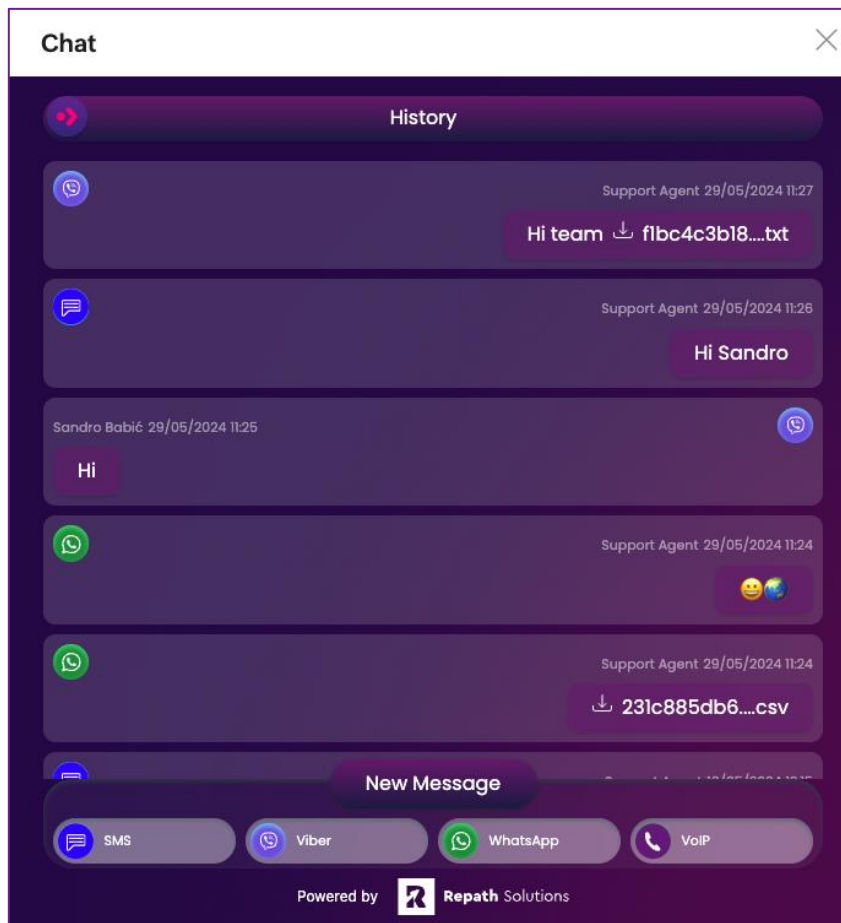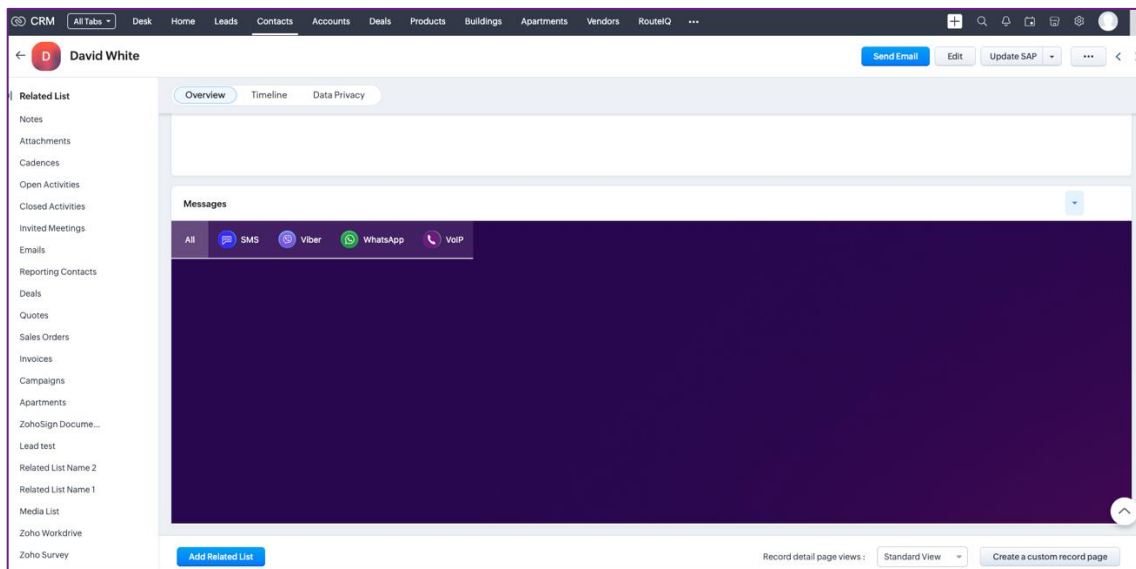

- Once you choose a channel, you can continue conversation.

  - Depending on the channel, you can **add text, attachment**, etc.

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- Please note, **WhatsApp conversation rules** apply (24h conversation window, user initiated vs. company initiated, templates).
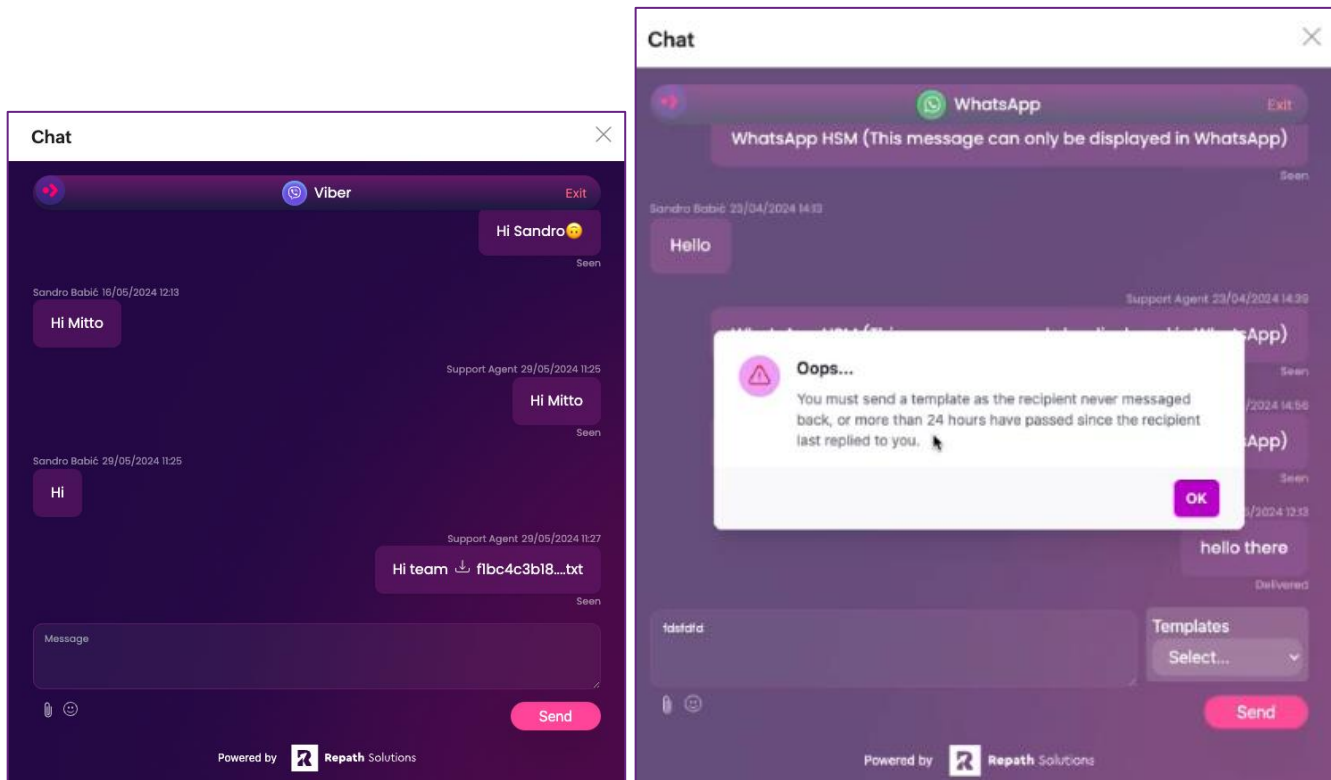
Note: you can find messaging history also once you open a contact, just scroll down and explore.

- When a contact replies to your message **Contact Owner will get a notification**. It will be visible in the upper corner under Signals (bell icon).
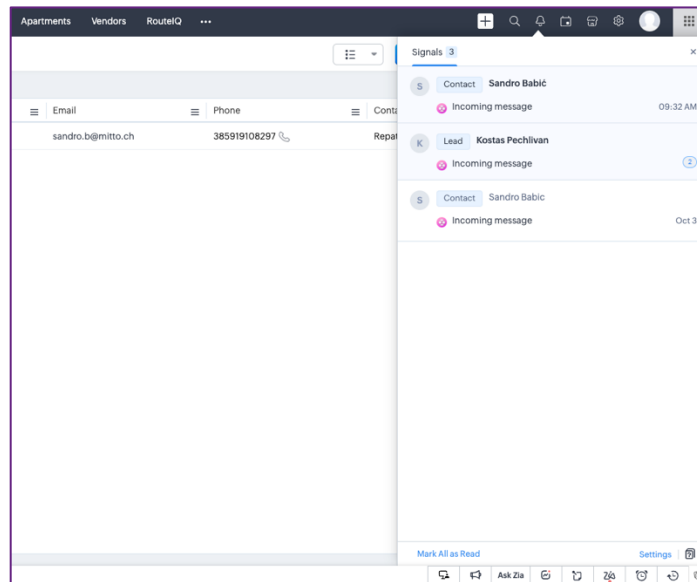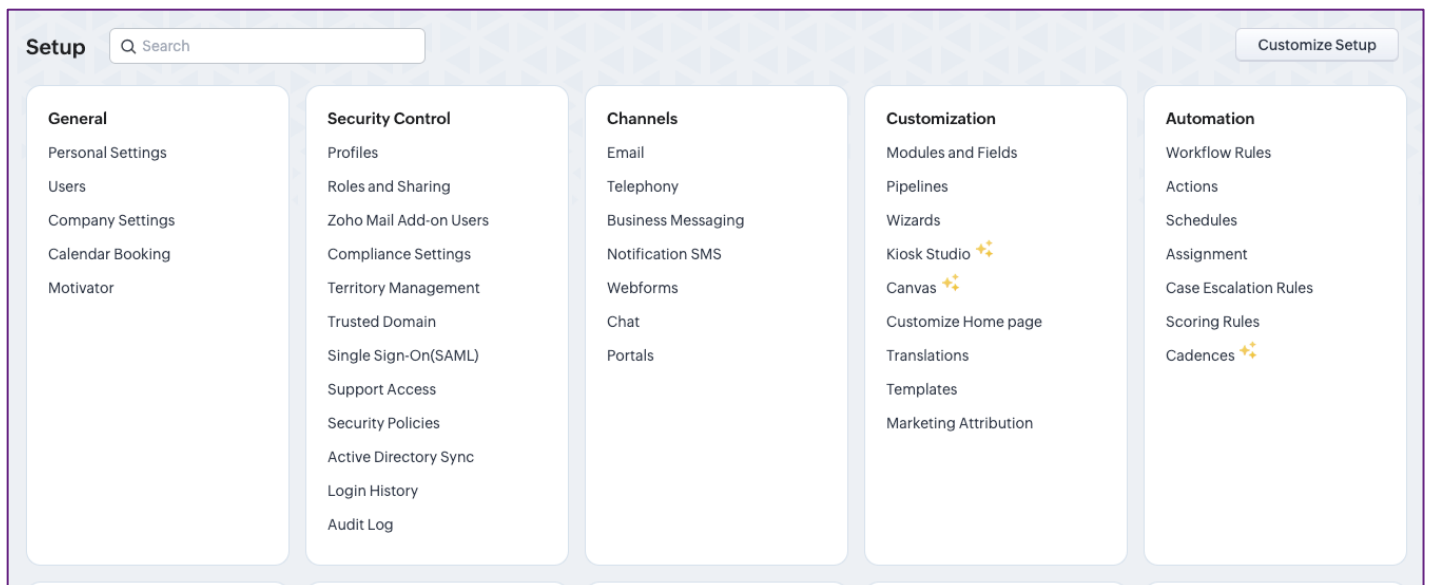
- Click on the notification to see more details.
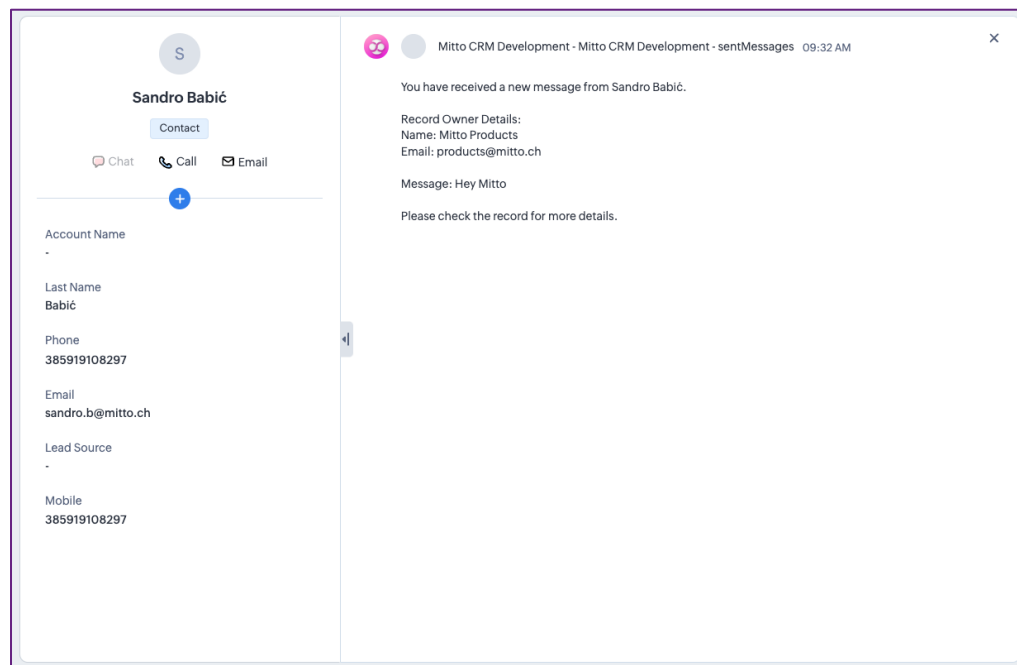
AUTOMATIONS

Add option to automatically send messages over a preferred channel using Zoho Automations. We support Leads, Contacts, Deals, Quotes, Sales orders.

- Go to Setup – **Automation – Workflow Rules** and start creating your Rules.

- Add a Rule name

- Add your conditions which once are met, message will be sent out, e.g. whenever a new contact is created.
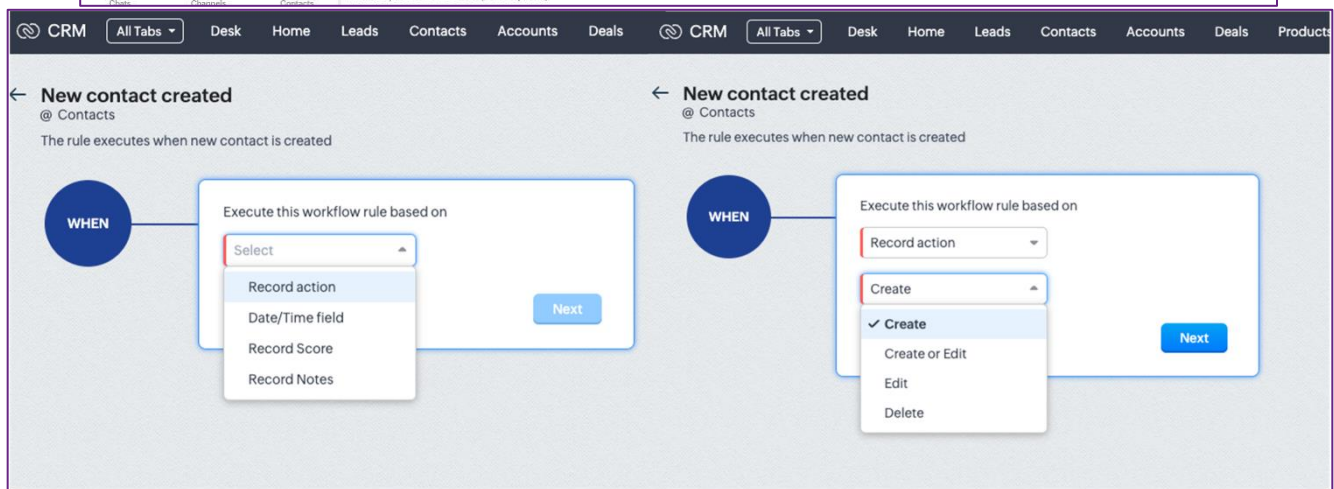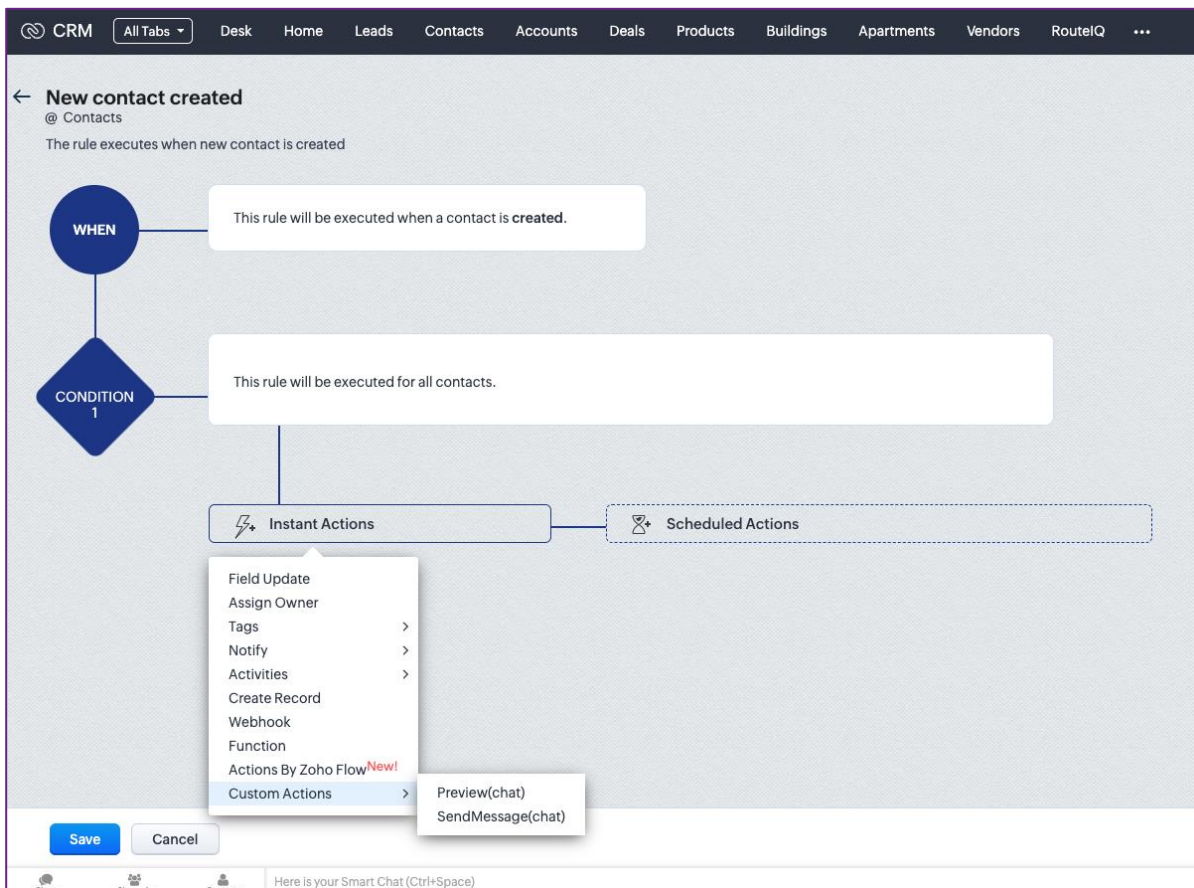
- Apply instant action: **Custom Actions – SendMessage(chat)**

- Choose the **channel and create message or choose a template**. Dynamic fields will help you **add personalization** details into your message.

- Your automation rule will appear as shown in the image below. Once you click Save, it will go live and be visible under **Automation – Workflow rules**.