



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](#)

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



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.

Choose Users/ Profiles

<input checked="" type="radio"/>	Install for admins only
<input type="radio"/>	Install for all users
<input type="radio"/>	Choose profiles

[< Back](#) [Confirm](#)

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



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.

[Configure](#) [Settings](#) [Uninstall](#)

- 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	<input type="text" value="Single Line"/>
Mitto SMS Traffic Account Id	<input type="text"/>
Mitto Username	<input type="text" value="Single Line"/>
Mitto Viber Traffic Account Id	<input type="text"/>
Mitto WhatsApp Traffic Account Id	<input type="text"/>
X-Mitto-API-Key	<input type="text"/>

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

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

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

CRMAll TabsHomeLeadsContactsAccountsDealsTasksMeetingsCallsChat Preference SettingsServicesTry CRM for Everyone

Traffic Account Settings

Configure the preferred communication channels for each CRM user. Assign SMS, Viber, and WhatsApp traffic accounts, and define a Sender ID to ensure that your messaging system works smoothly.

- Select a CRM user.
- Choose the correct traffic account for each channel.
- Enter a sender ID name or number.
- Click on **Save Preferences**.
- The system will apply your settings automatically.

Note: If no traffic account is selected for a channel, the user will not be able to send messages or view previous messages for that channel.

Assign Traffic Accounts

Select User:
mittoagproducts

SMS Traffic Account:
Mitto - Repath SMS (421902023456)

SMS Sender ID:
Mitto

Viber Traffic Account:
Mitto - Repath (12345678)

WhatsApp Traffic Account:
Mitto - Repath WA (302106084140)

Save Preferences

Powered by Repath Solutions

CRMAll TabsHomeLeadsContactsAccountsDealsTasksMeetingsCallsChat User PreferencesServicesTry CRM for Everyone

M mittoagproducts

Add Tags

Send Email

Edit

Related List

Notes

Attachments

Emails

Open Activities

Closed Activities

Zoho Survey

Add Related List

Links

Add Link

OverviewTimeline

Last Update : 55 day(s) ago

Chat User Preference	mittoagproducts
Owner	
Modified By	mittoagproducts
	Tue, 27 May 2025 08:06 PM

Hide Details

Chat User Preference Information

Chat User Preference Name	mittoagproducts	Chat User Preference Owner	mittoagproducts
Created By	mittoagproducts	Modified By	mittoagproducts
	Tue, 27 May 2025 08:06 PM		Tue, 27 May 2025 08:06 PM
Preferred SMS Account ID	e8a5e53f-51ce-4cc8-9f3c-43fb1d24daf7	Preferred Viber Account ID	3308bf08-a139-48f9-97a3-fe66ed24e1bd
Preferred WhatsApp Account ID	a098e032-2cdb-471b-ac05-9f48e237d3d5		

Notes

Recent Last

Add a note

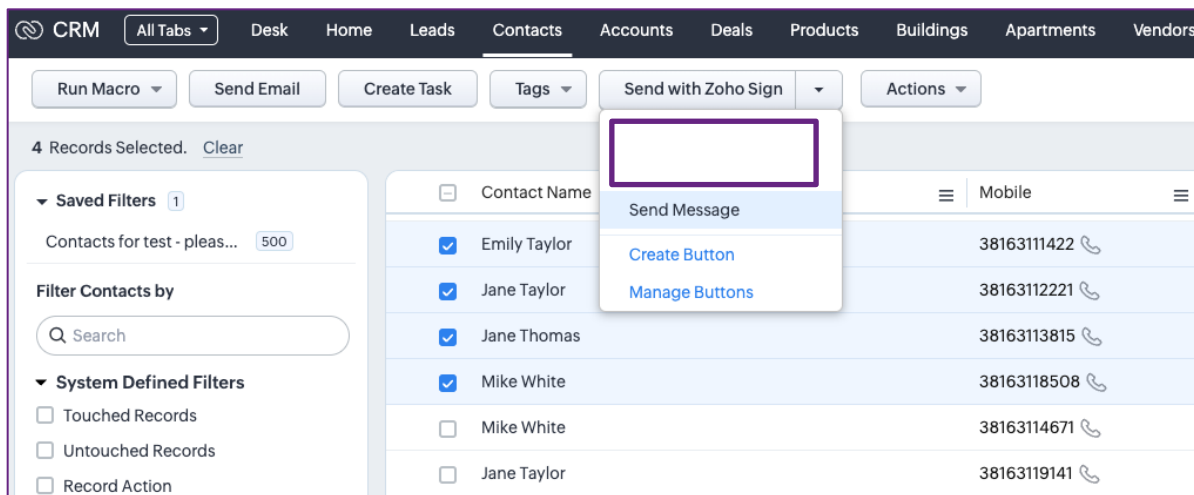
PART 2

SENDING MESSAGES

BULK MESSAGES

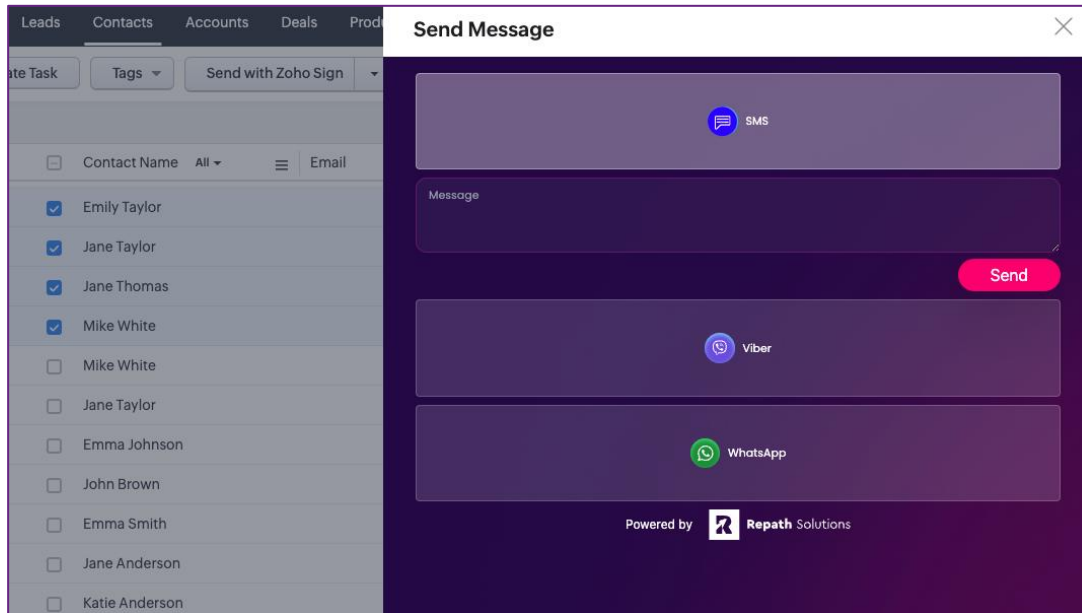
Sending messages from Zoho CRM is **supported for Contacts, Leads** module.

- 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.



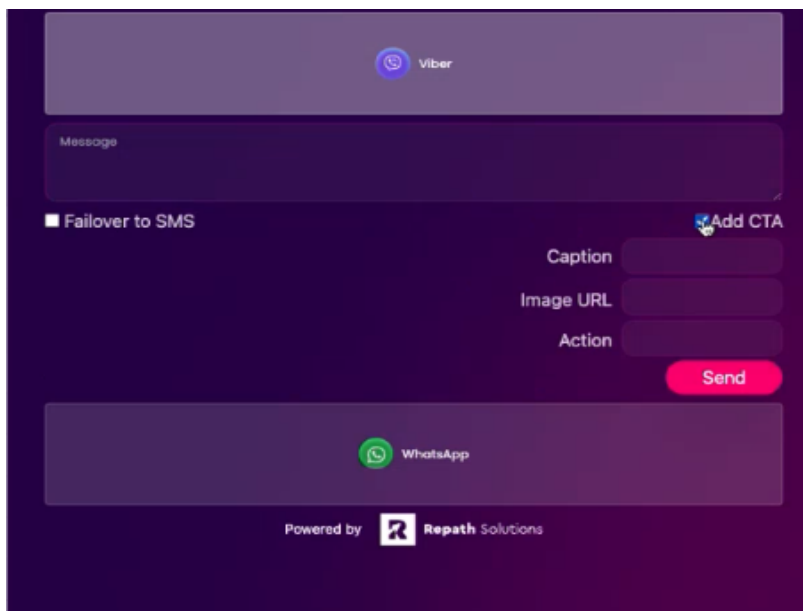
A menu of channels will pop up allowing you to choose between SMS, WhatsApp or Viber.

- **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 message can not be delivered to Viber (e.g. person has no Internet or deleted the app).



- **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 message 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 [Meta's official documentation](#).
 - To register a WhatsApp template, please consult with your account manager.

Send Message

SMS

Viber

WhatsApp

Templates

hello

☒ Failover to SMS

Message

Send

Powered by Repath Solutions

Dynamic Fields Input

Input 1

Input 2

Dynamic Fields

Select...

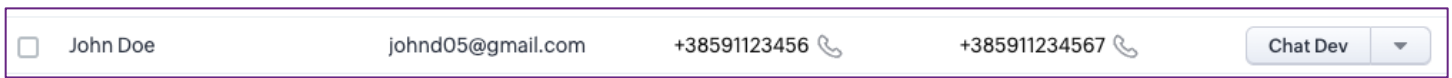
Submit

TWO-WAY MESSAGES (CHAT)

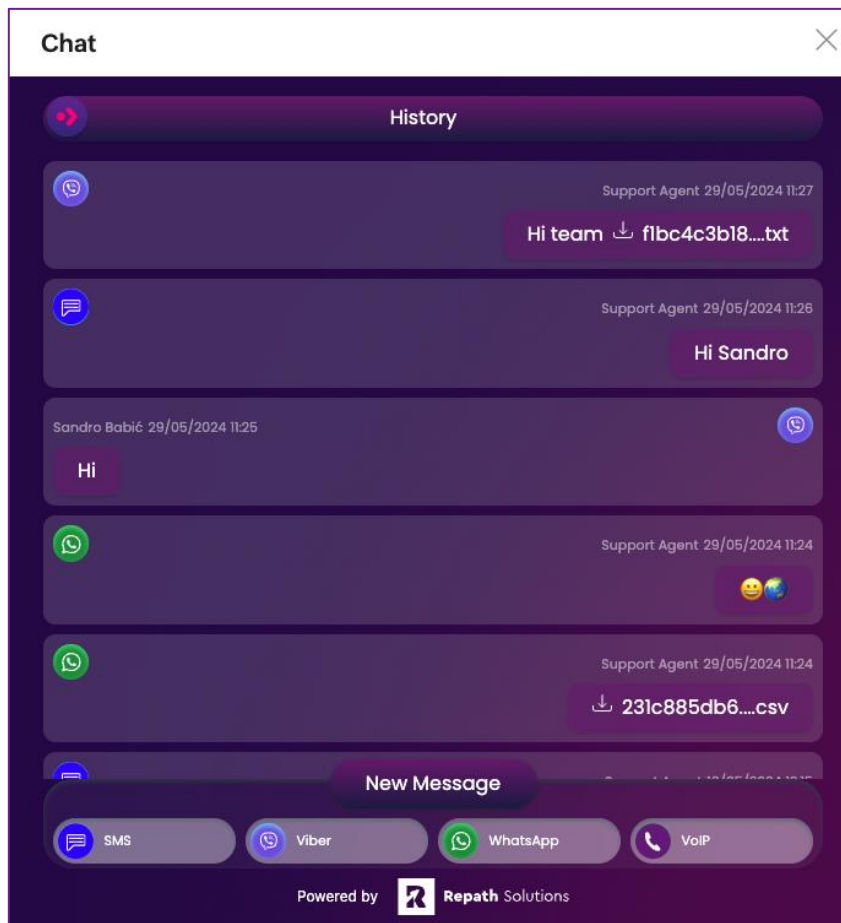
Sending two-way messages from Zoho CRM is **supported for Contacts and Leads** module.

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

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

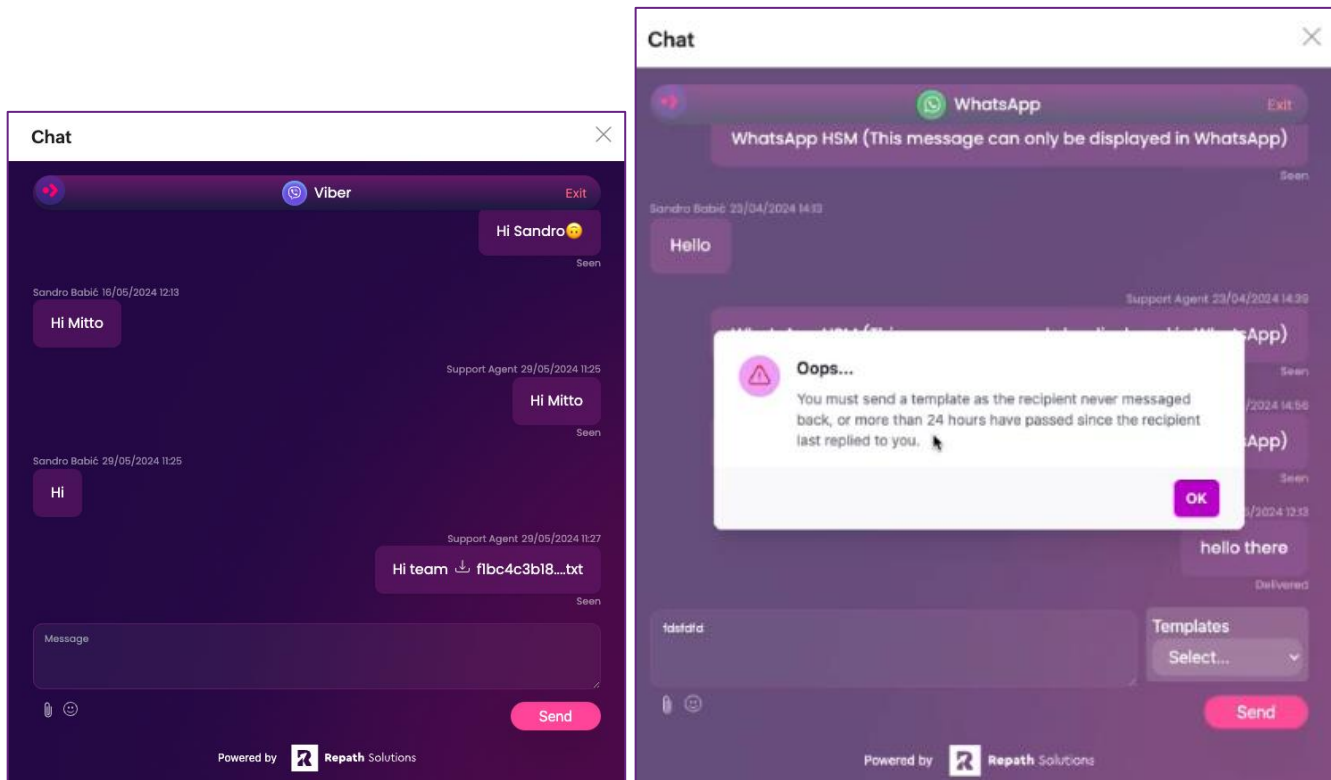


- A pop up will appear showing you **entire messaging history across all channels** for that specific person. Messages sent as a bulk action will also be visible here. You can filter conversations per channel by choosing one below.

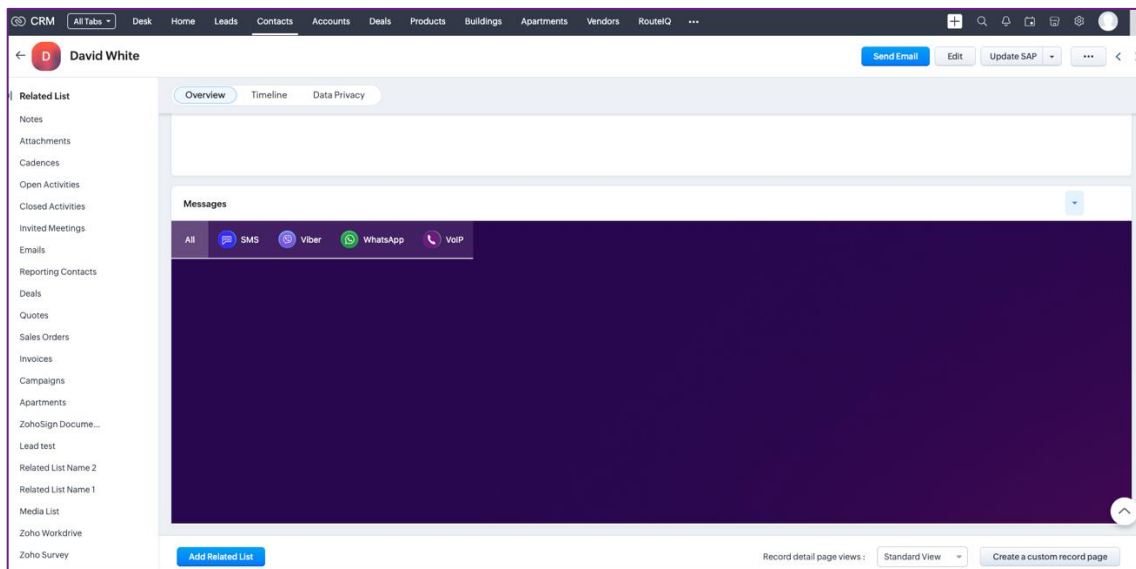


- Once you choose a channel, you can continue conversation.
 - Depending on the channel, you can **add text, attachment**, etc.

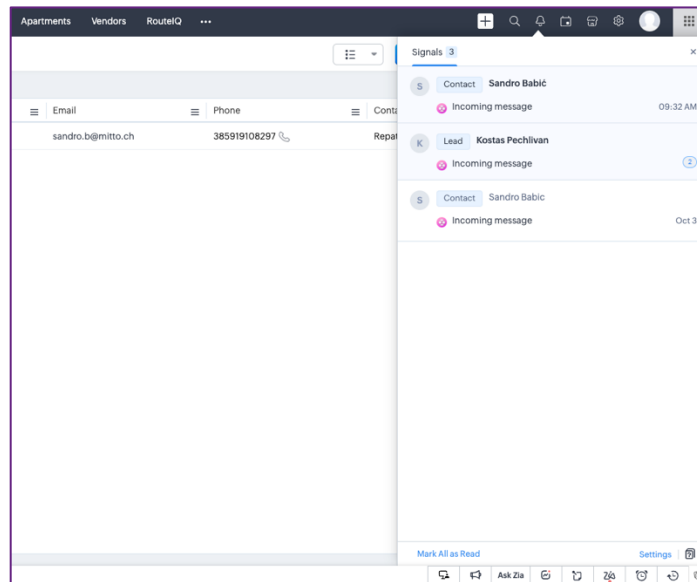
- Please note, **WhatsApp conversation rules** apply (24h conversation window, user initiated vs. company initiated, templates).



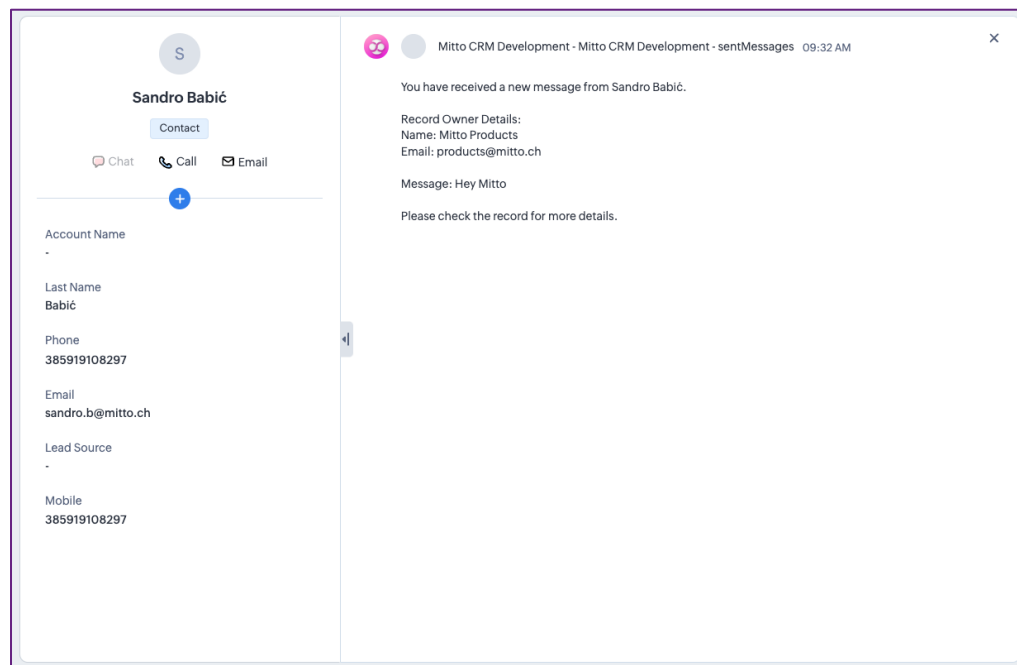
Note: you can find messaging history also once you open a contact, just scroll down and explore.



- 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).



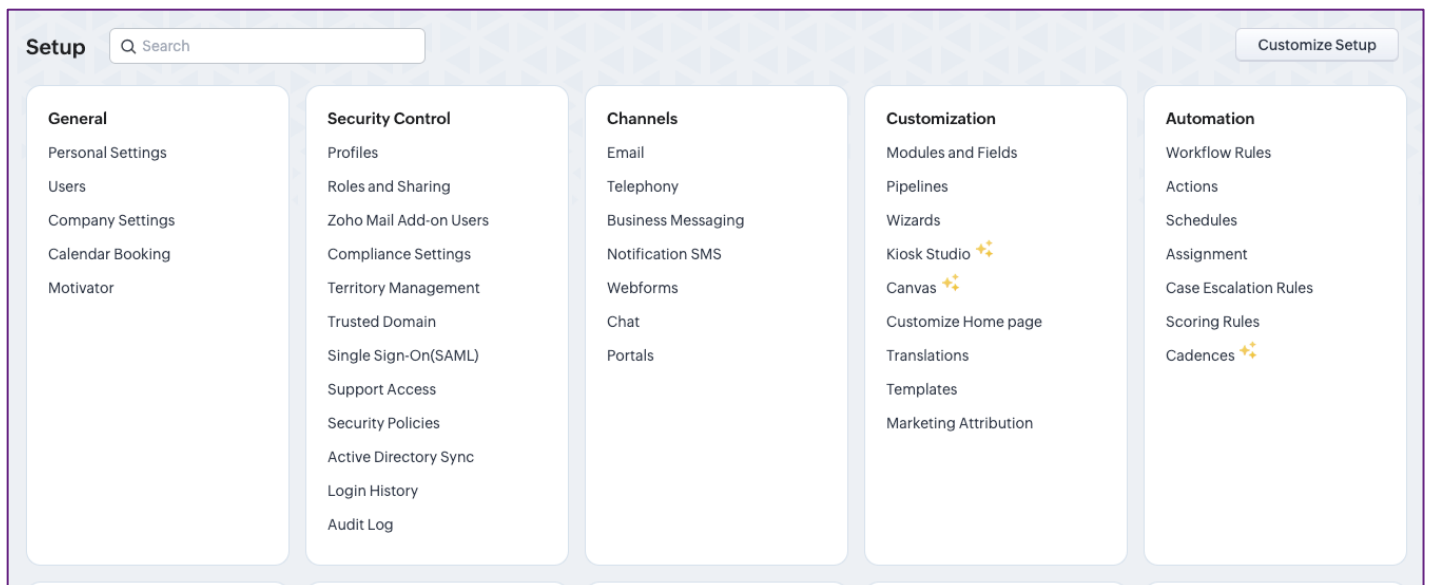
- Click on the notification to see more details.



AUTOMATIONS

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

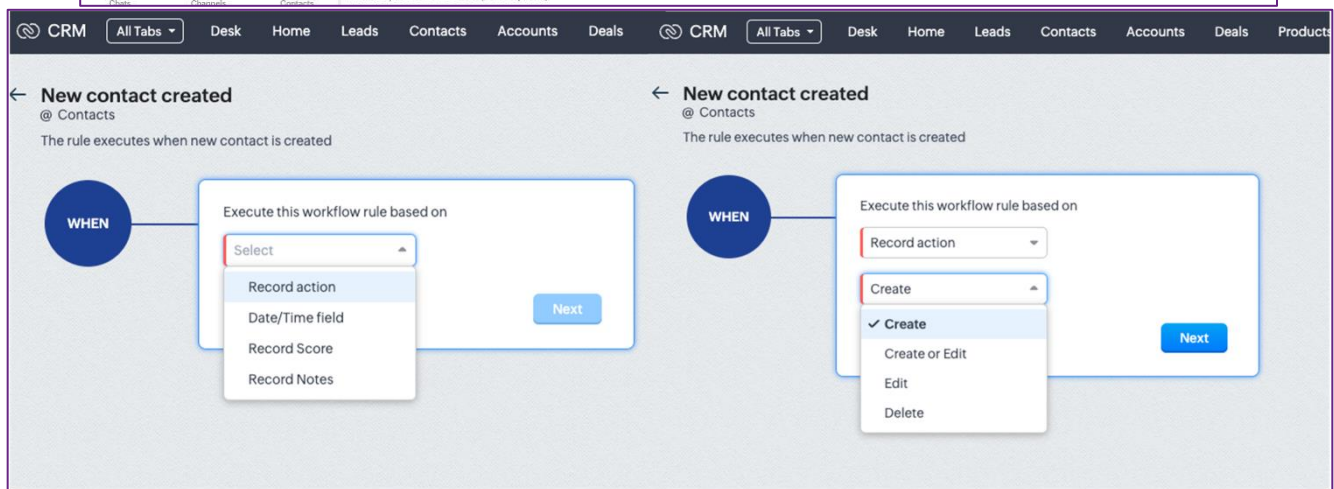
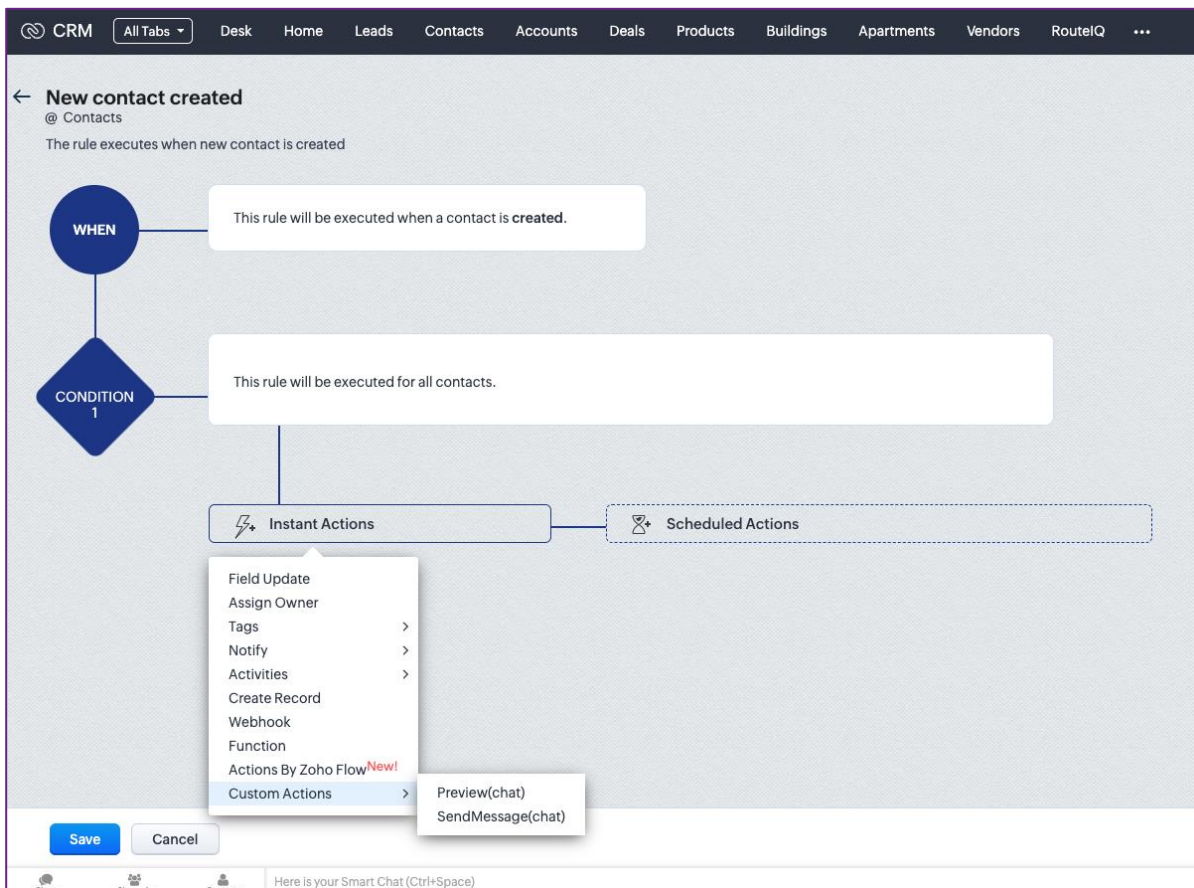
- Go to Setup – **Automation – Workflow Rules** and start creating your Rules.



- Add a Rule name

A 'Create New Rule' dialog box with three input fields. The 'Module' field is a dropdown menu with 'Contacts' selected. The 'Rule Name' field contains the text 'New contact created'. The 'Description' field contains the text 'The rule executes when new contact is created'. At the bottom right, there are two buttons: 'Cancel' and 'Next'.

- 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.

SendMessage(chat)

Welcome to our messaging tool!

Follow these steps to send customized messages:

- Select the client's preferred communication channel.
- Choose dynamic fields from Zoho CRM to add to your message.
- If using Viber or WhatsApp, provide a backup message for non-registered clients.

Communication Channel:

SMS

Insert Dynamic Field Values:


First Name

Select Fields

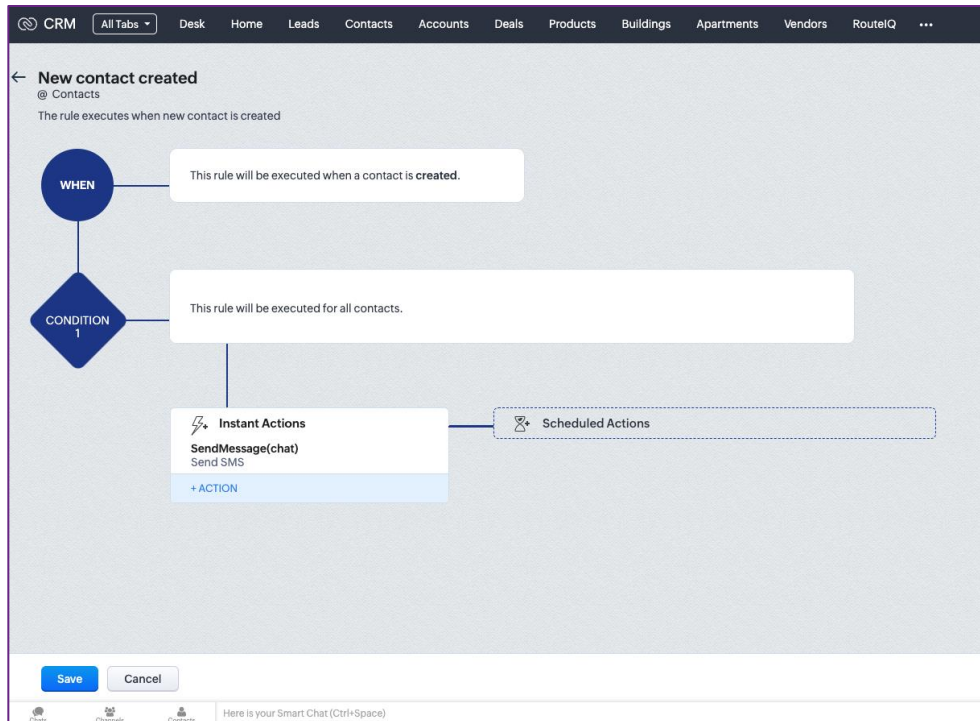
Message Template:

Hi \${!Leads.First_Name}, your account has been created.

Save

Powered by  Repath Solutions

- 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**.



The screenshot shows the "Workflow Rules" setup page in the CRM. The left sidebar contains a "Setup" menu with various options. The main area displays a table of workflow rules. The table has columns for Rule Name, All Modules, Execute On, Actions, Last Modified, and Status. A single rule is listed: "New contact created", which is associated with "Contacts" and has 1 action. The status is "On".

Rule Name	All Modules	Execute On	Actions	Last Modified	Status
New contact created	Contacts	Create	1	Oct 07, 2024	On

mitto'