

The Mitto logo features the word "mitto" in a white, lowercase, sans-serif font. A white arrowhead points to the right from the top of the letter "o".The Zoho CRM logo consists of a white circular icon with a stylized paperclip or infinity symbol inside. To the right of the icon, the words "Zoho" and "CRM" are stacked vertically in a white, sans-serif font.

# 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


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### Prerequisites:

- Zoho account
- **Mitto account:**
  - **Guide – [How to create Mitto account](#) and find API keys**
  - **Guide – [How to create WhatsApp templates](#)**

### Steps:

- Find Mitto 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 **mneselina** (mneselina@gmail.com)  
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.
  - If you send two-way SMS you will need to insert your virtual number here, add Viber and WhatsApp traffic account IDs. Insert Mitto API keys also, [learn where to get it.](#)

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

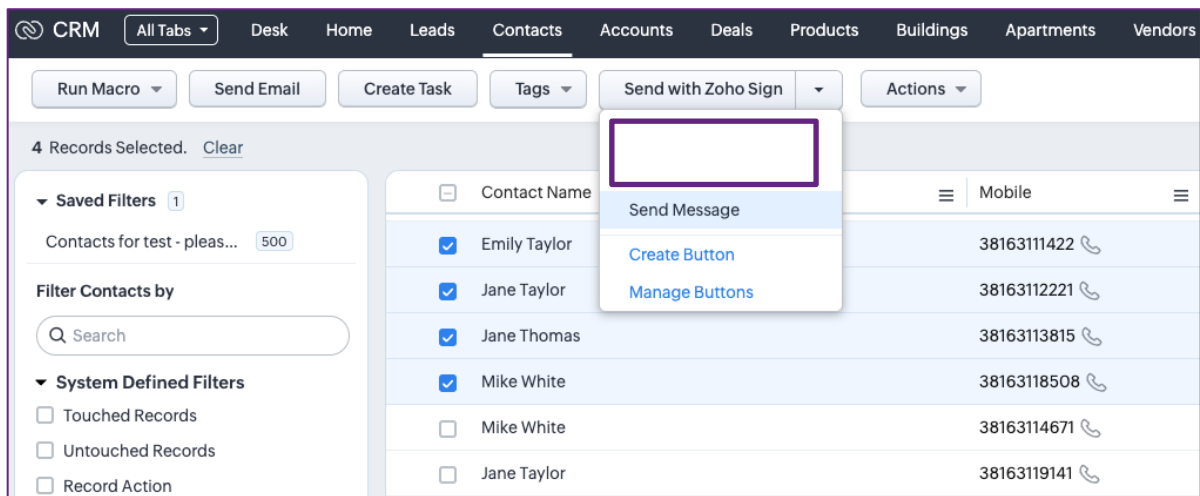
## PART 2

# SENDING MESSAGES

## BULK MESSAGES

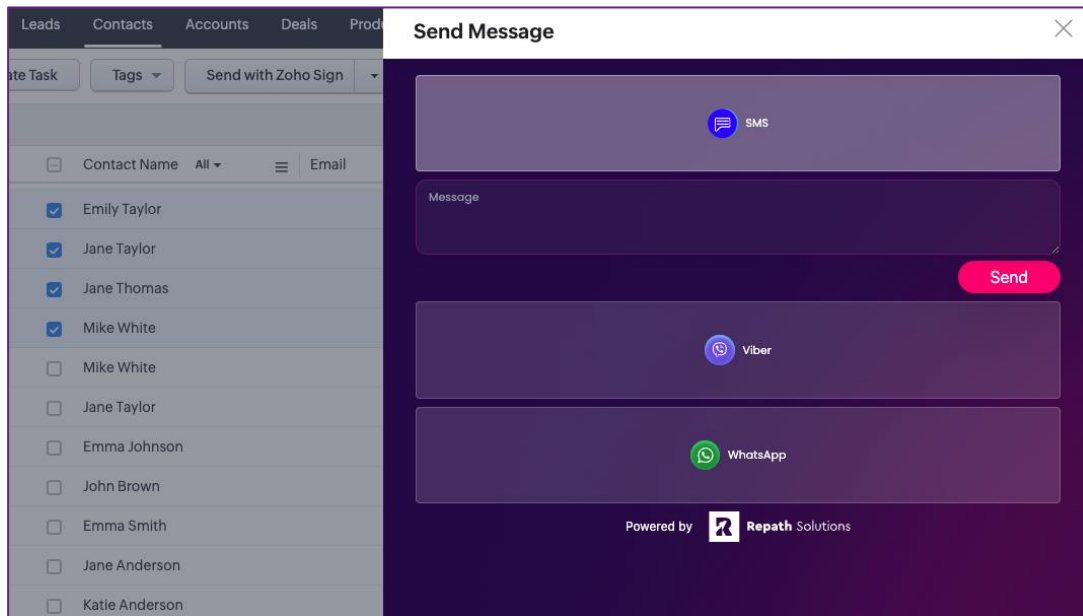
Sending messages from Zoho CRM is **supported for Contacts and Leads** module.

- 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.



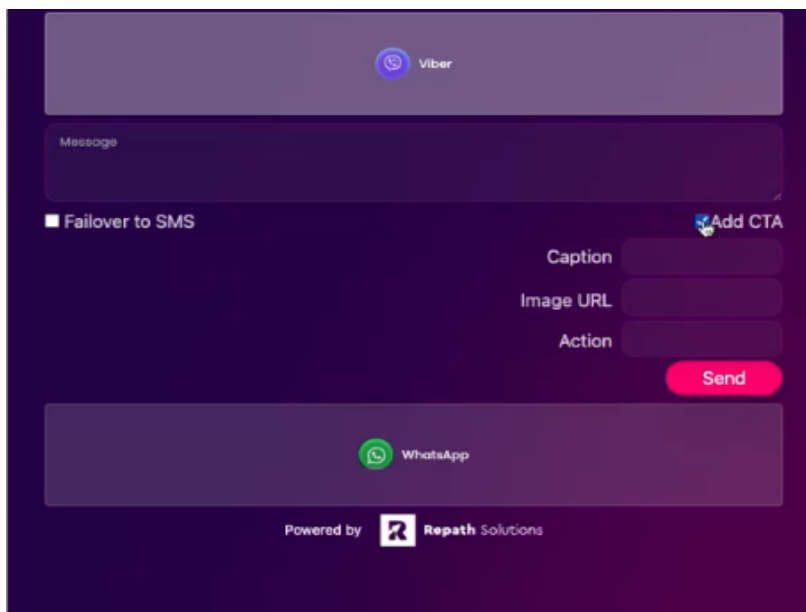
A menu of channels will pop up allowing you to choose between SMS, WhatsApp or Viber.

- **SMS** – simply type your message and hit Send.

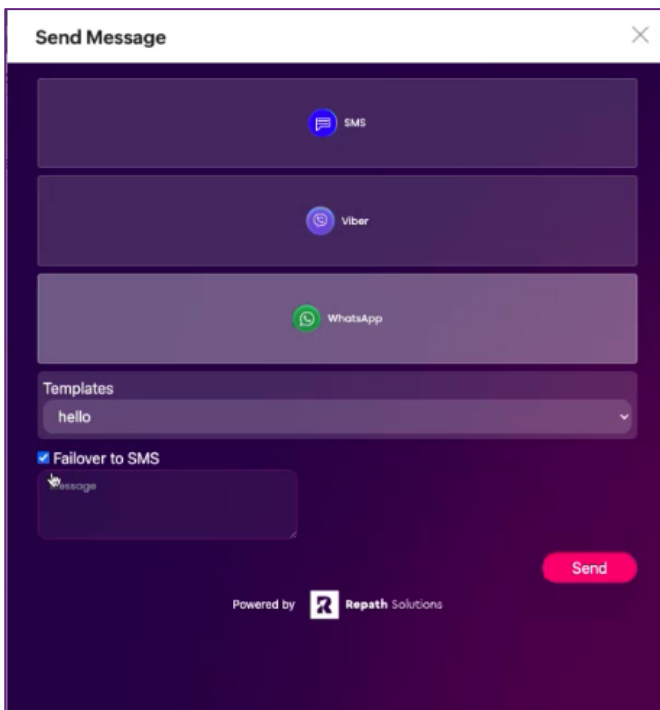


**NOTE:** Your SMS Sender ID is already defined in the Extension Settings part

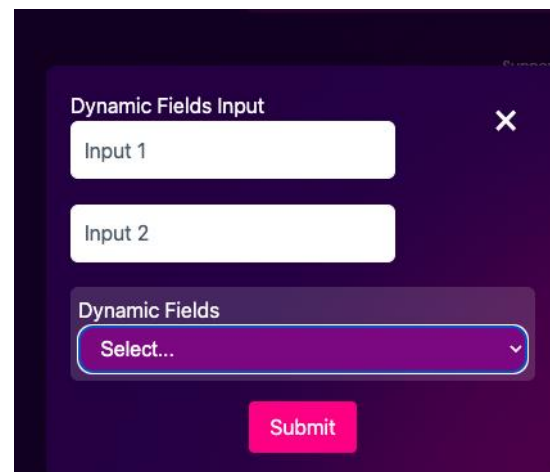
- **Viber** – type your message and hit Send. If you wish, you can add a CTA (image URL, action, caption). You can also set a **failover message to SMS** if the message can not be delivered to Viber (e.g. person has no Internet or deleted the app).



- **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.



The screenshot shows a 'Send Message' dialog box with a close button in the top right. It features three main communication channel options: SMS, Viber, and WhatsApp, each with its respective icon. Below these is a 'Templates' dropdown menu currently set to 'hello'. A checkbox labeled 'Failover to SMS' is checked, with a 'message' input field below it. A red 'Send' button is located at the bottom right. The footer indicates 'Powered by Repath Solutions'.

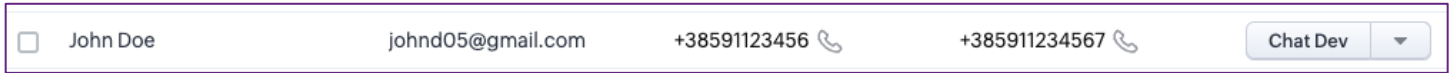


The screenshot shows a 'Dynamic Fields Input' dialog box with a close button in the top right. It contains two text input fields labeled 'Input 1' and 'Input 2'. Below these is a 'Dynamic Fields' dropdown menu with 'Select...' as the current selection. A red 'Submit' button is positioned at the bottom center.

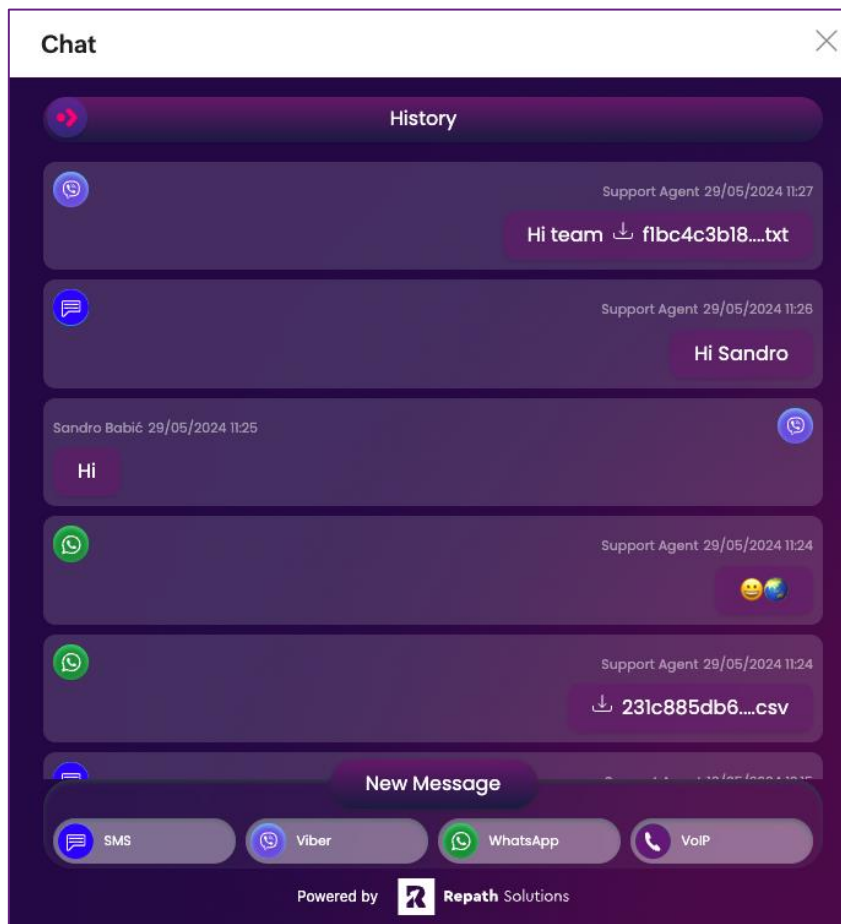
## TWO-WAY MESSAGES (CHAT)

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**.

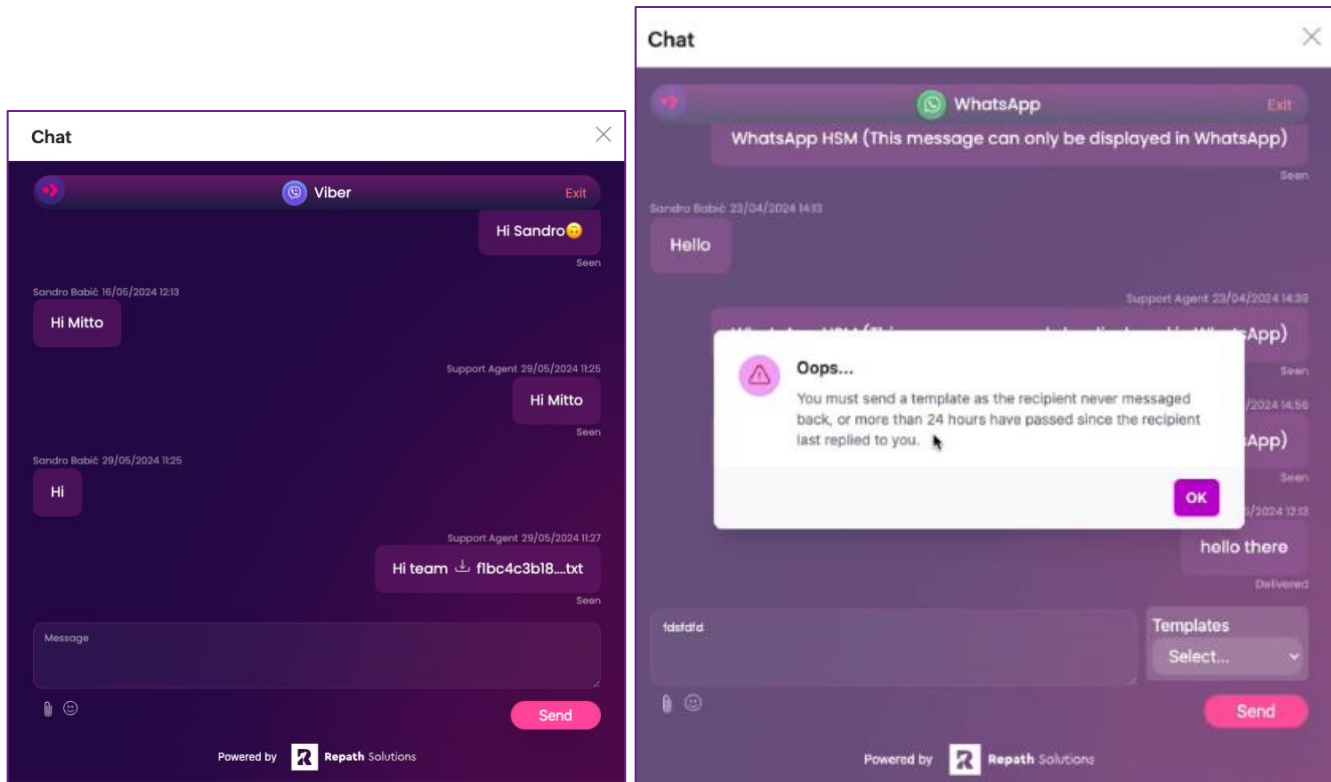


- A pop up will appear showing you **entire messaging history across all channels** for that specific person. Messages sent as a bulk action will also be visible here. You can filter conversations per channel by choosing one below.

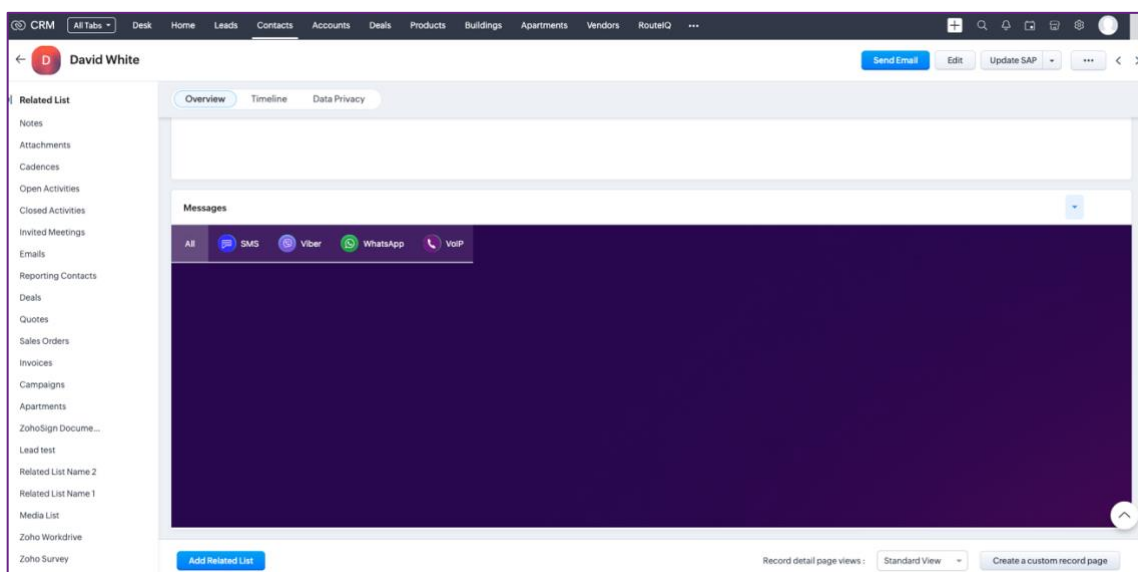




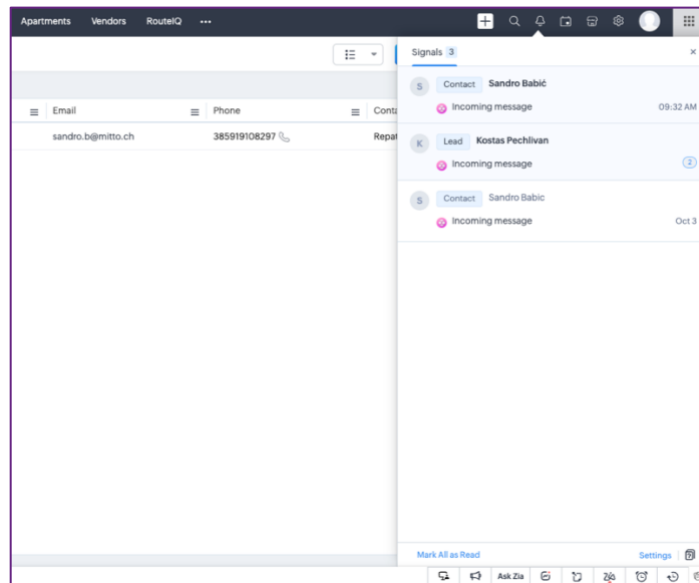
- Once you choose a channel, you can continue conversation.
  - Depending on the channel, you can **add text, attachment**, etc.
  - Please note, **WhatsApp conversation rules** apply (24h conversation window, user initiated vs. company initiated, templates).



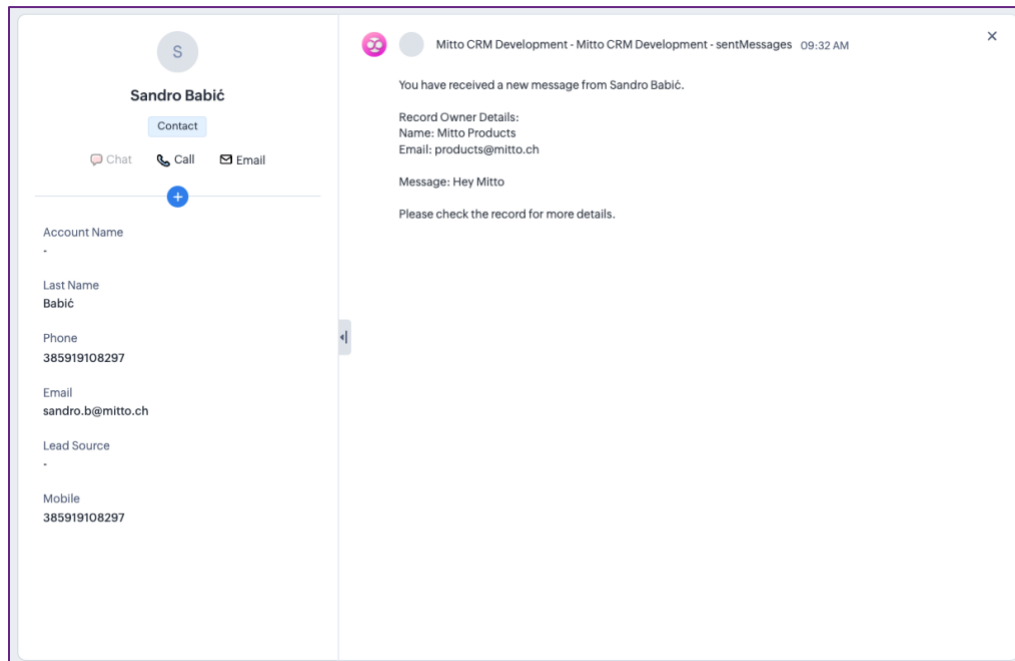
*Note: you can find messaging history also once you open a contact, just scroll down and explore.*



- 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).



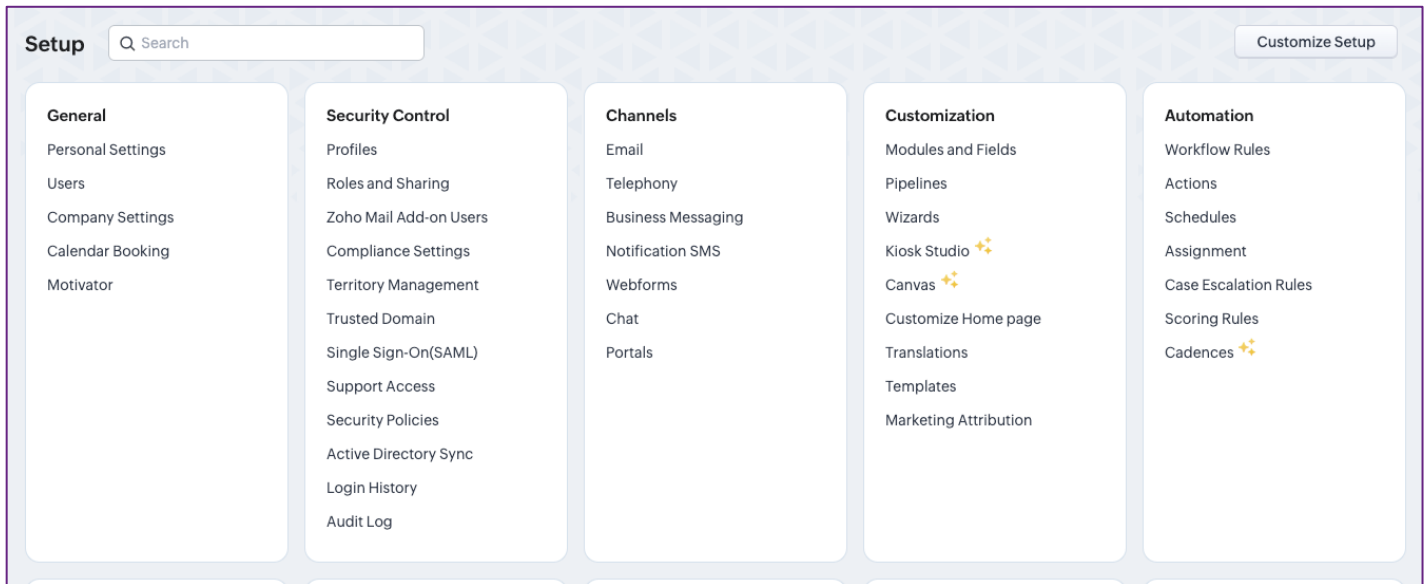
- Click on the notification to see more details.



## AUTOMATIONS

Add option to automatically send messages over a preferred channel using Zoho Automations.

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



- Add a Rule name

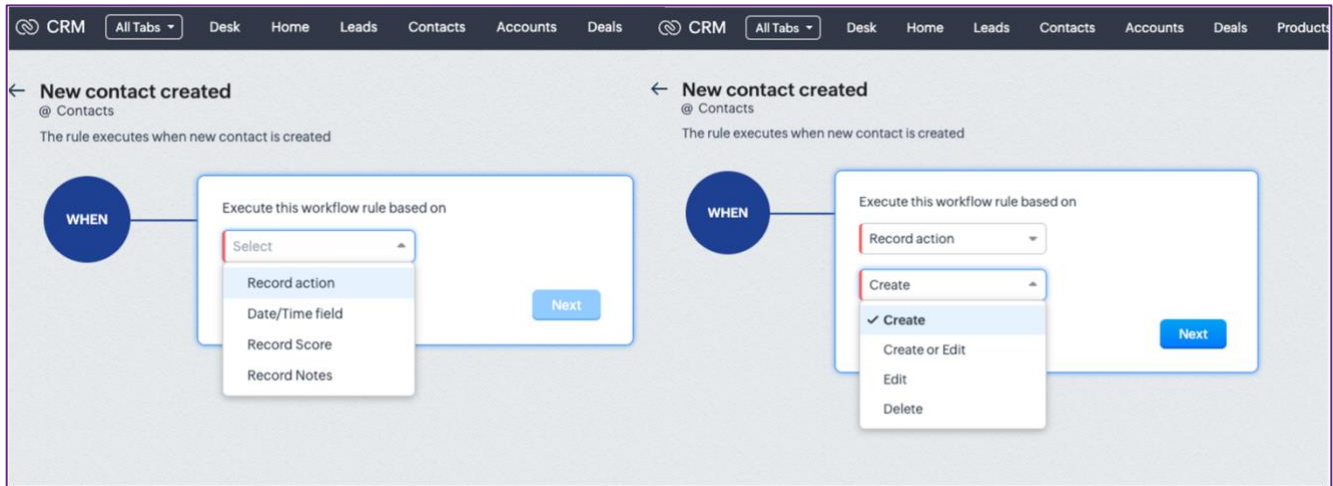
### Create New Rule

Module

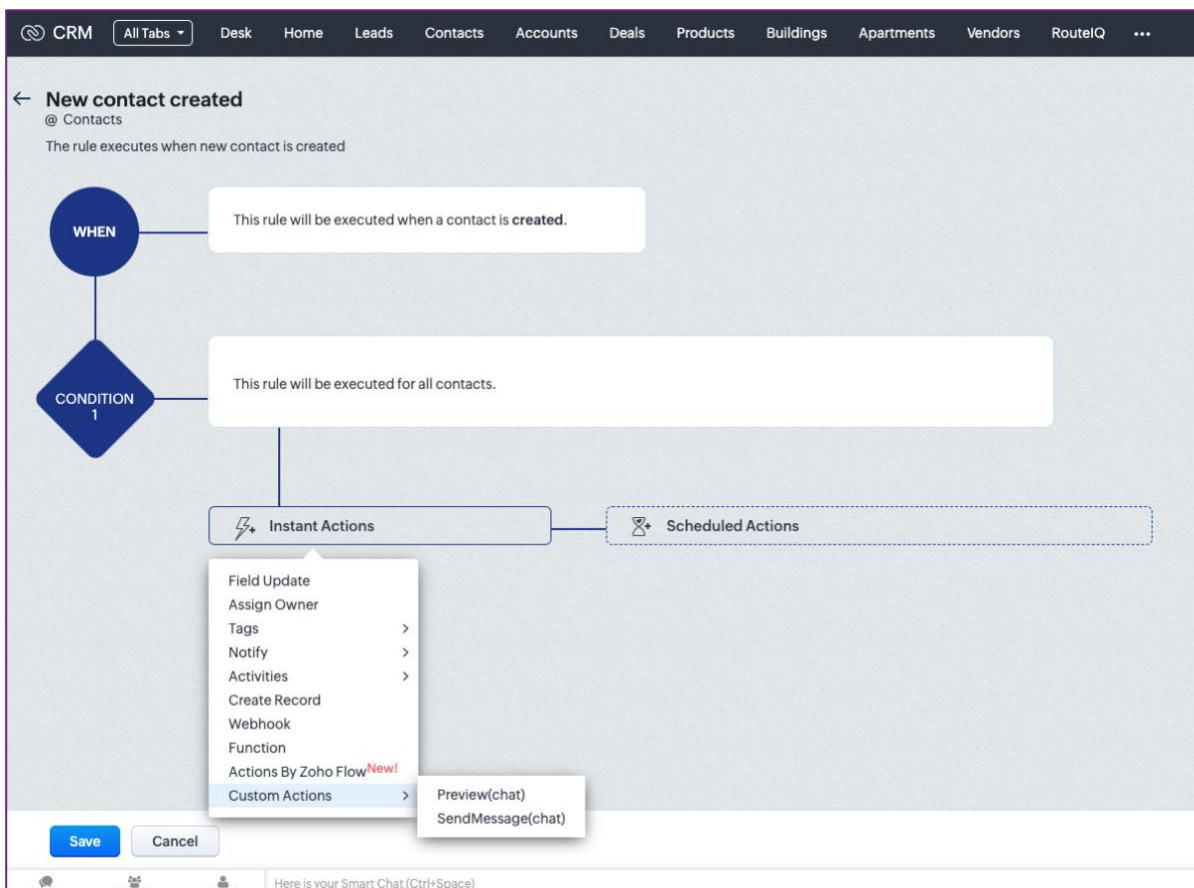
Rule Name

Description

- 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

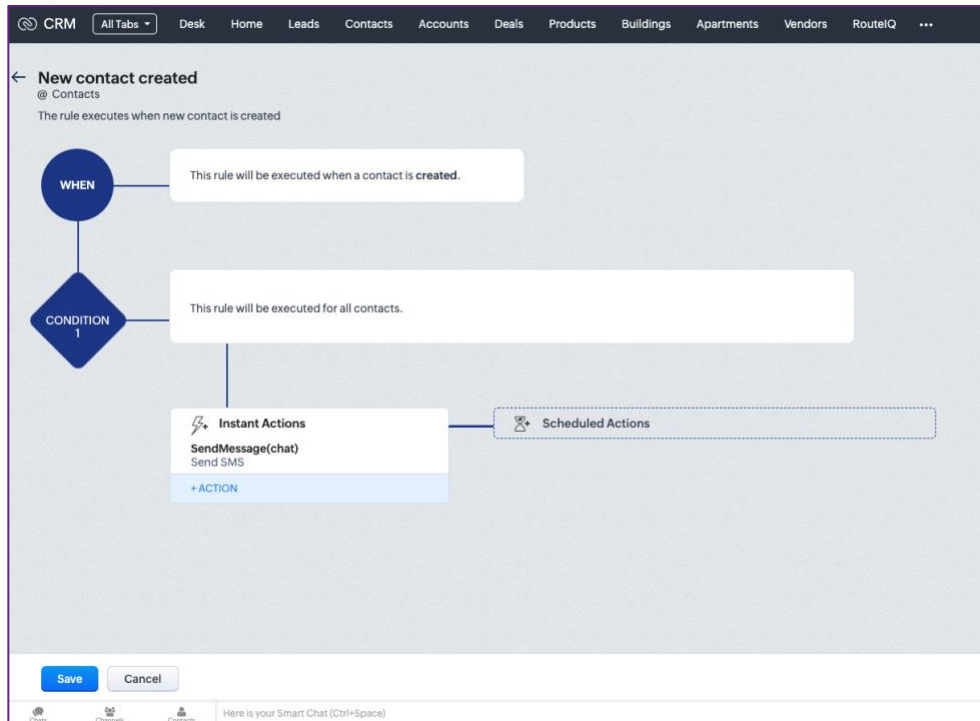
Select Fields

**Message Template:**  
Hi \${!Leads.First\_Name}, your account has been created.

Save

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- 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**.



**Workflow Rules**  
Workflow rules allow you to perform certain automatic actions on specific records based on filter criteria. Workflow automations can send emails, update fields, create records and much more.

new contact

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

Here is your Smart Chat (Ctrl+Space)

**mitto**➤