

The Mitto logo consists of the word "mitto" in a lowercase, white, sans-serif font, followed by a white chevron symbol pointing to the right.The Zoho CRM logo features a white circular icon with a stylized paperclip or infinity symbol inside, followed by the text "Zoho CRM" 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

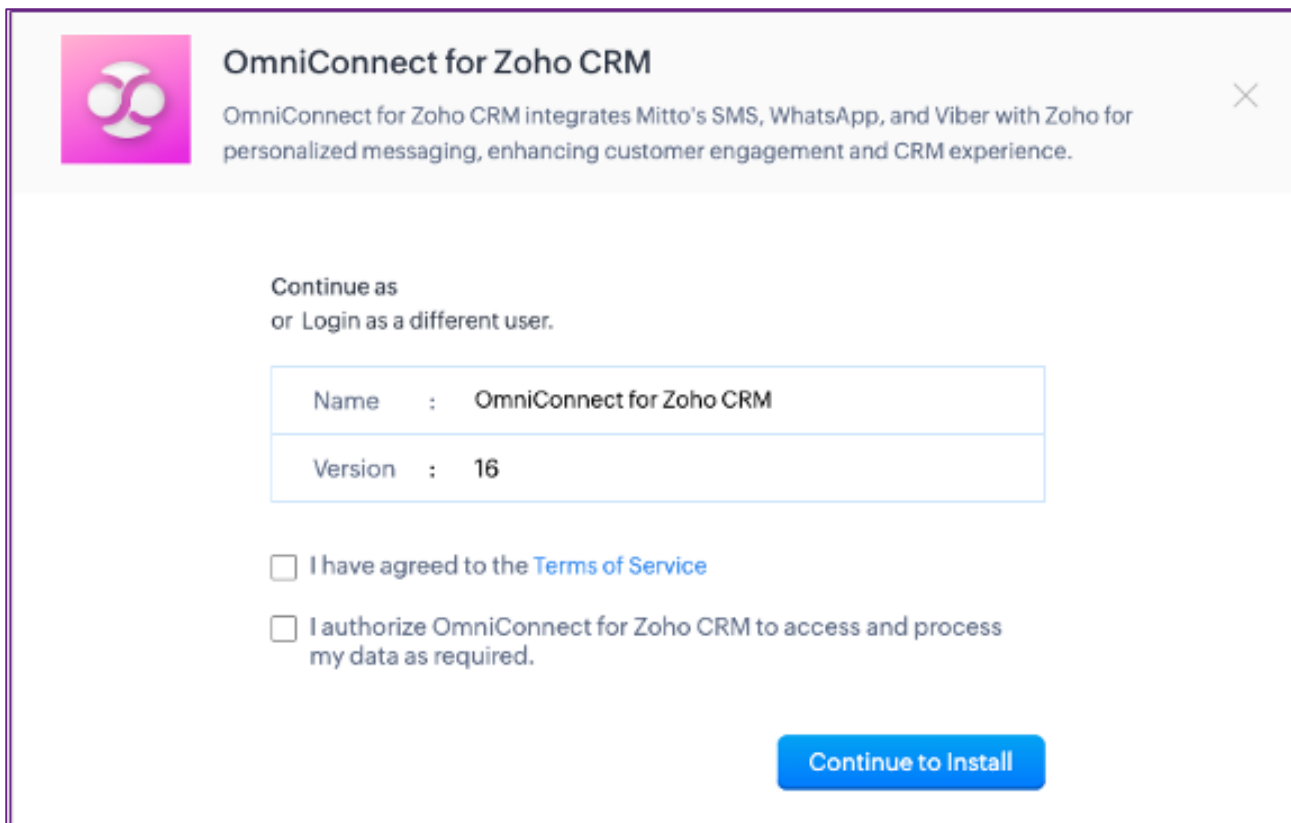
MITTO INTEGRATION

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.



- 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.

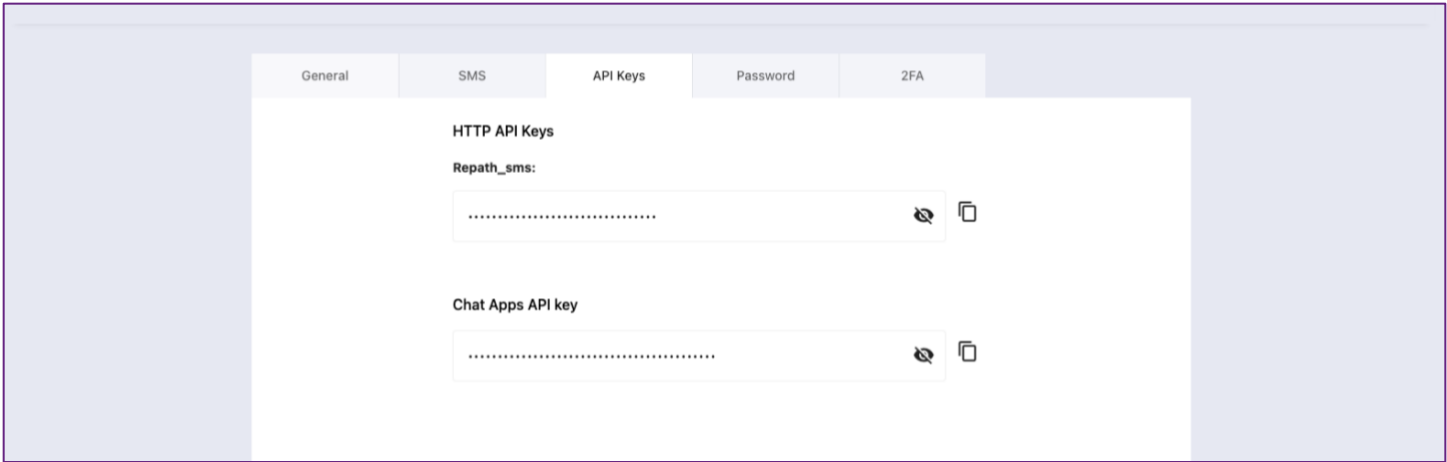
Variable Name	Value
Mitto Password	Single Line
Mitto SMS Traffic Account Id	
Mitto Username	Single Line
Mitto Viber Traffic Account Id	
Mitto WhatsApp Traffic Account Id	
X-Mitto-API-Key	

- 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 Campaigns > Traffic Accounts page

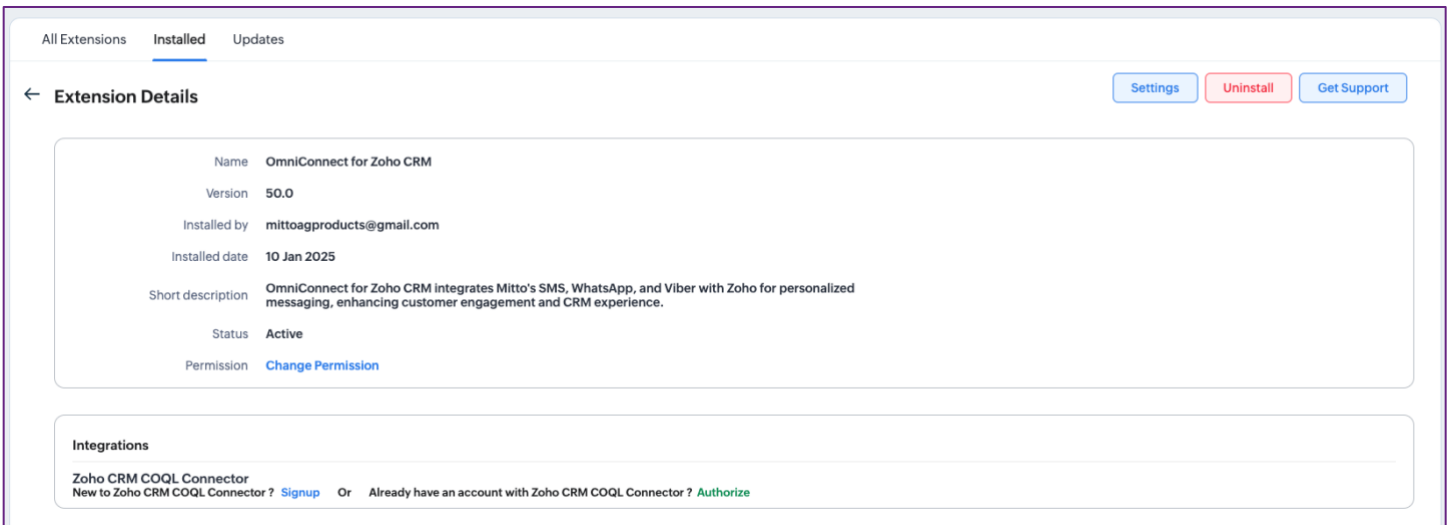
ACCOUNT NAME	CHAT APPS TRAFFIC ACCOUNT ID	DISPLAY NAME	ACCOUNT TYPE	STATUS	ACTION
SMS - Campaign		Test account	Campaign	Active	
Viber - Marketing	3308bf08-a139-48f9-97a3-fe66ed24e1bd		Viber	Active	
SMS API	9091f64c-6353-4196-bf06-18dbe399ce0a		HTTP	Active	
Viber - Notifications	7d60b25c-cfc9-44ea-b5e2-ab5bea369db2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

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

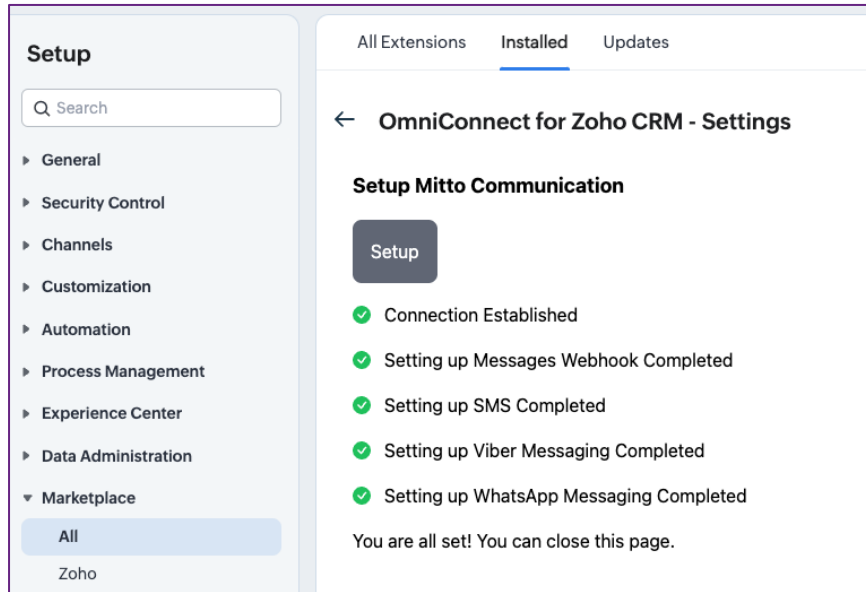
- X- Mitto-API- Key – ChatApps API Key, used to authenticate with Mitto’s platform , can be found in Mitto Campaigns Portal under Settings > API Keys page
 - Reminder: [How to create Mitto account](#), register for chat apps and find API keys



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



- 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.



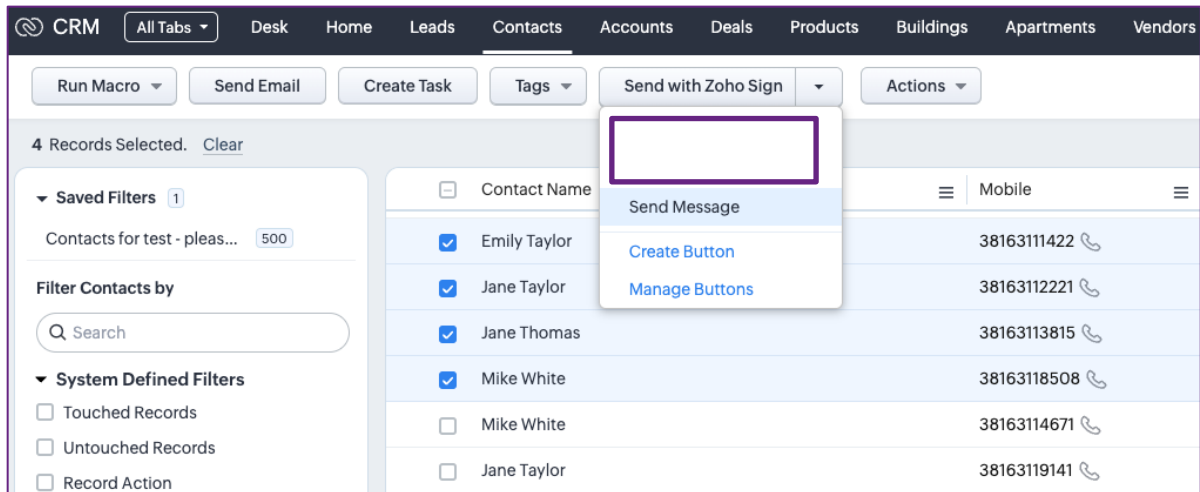
PART 2

SENDING MESSAGES

BULK MESSAGES

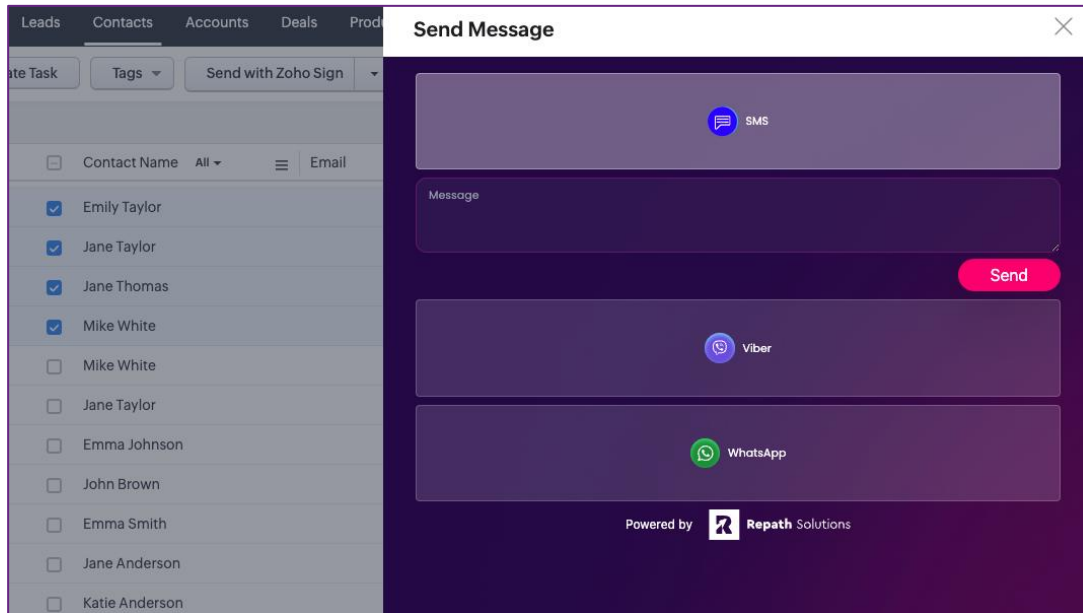
Sending messages from Zoho CRM is **supported for Contacts and Leads** module.

- 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.



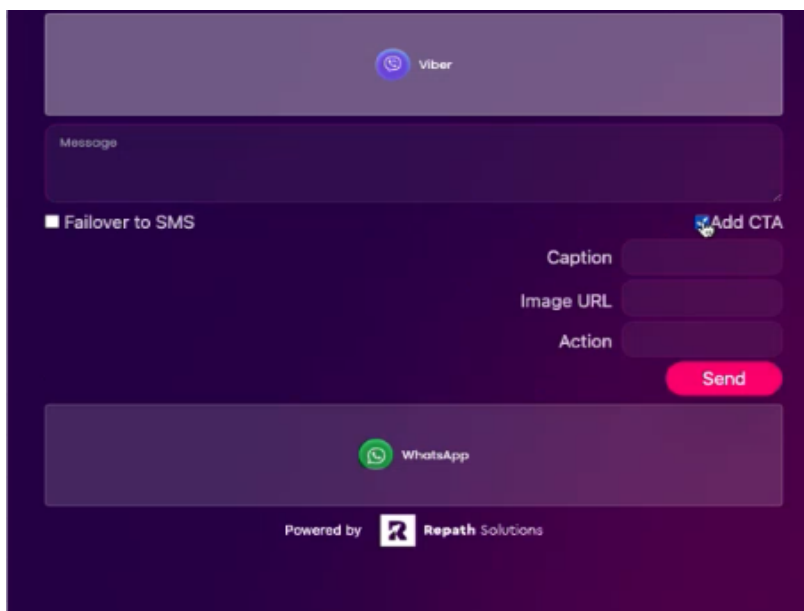
A menu of channels will pop up allowing you to choose between SMS, WhatsApp or Viber.

- **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.

Send Message

SMS

Viber

WhatsApp

Templates

hello

Failover to SMS

Message

Send

Powered by Reopath Solutions

Dynamic Fields Input

Input 1

Input 2

Dynamic Fields

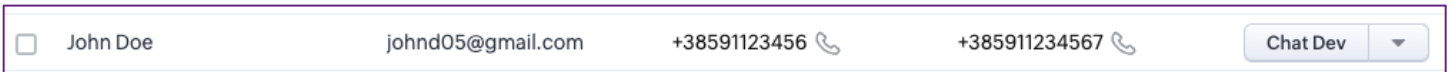
Select...

Submit

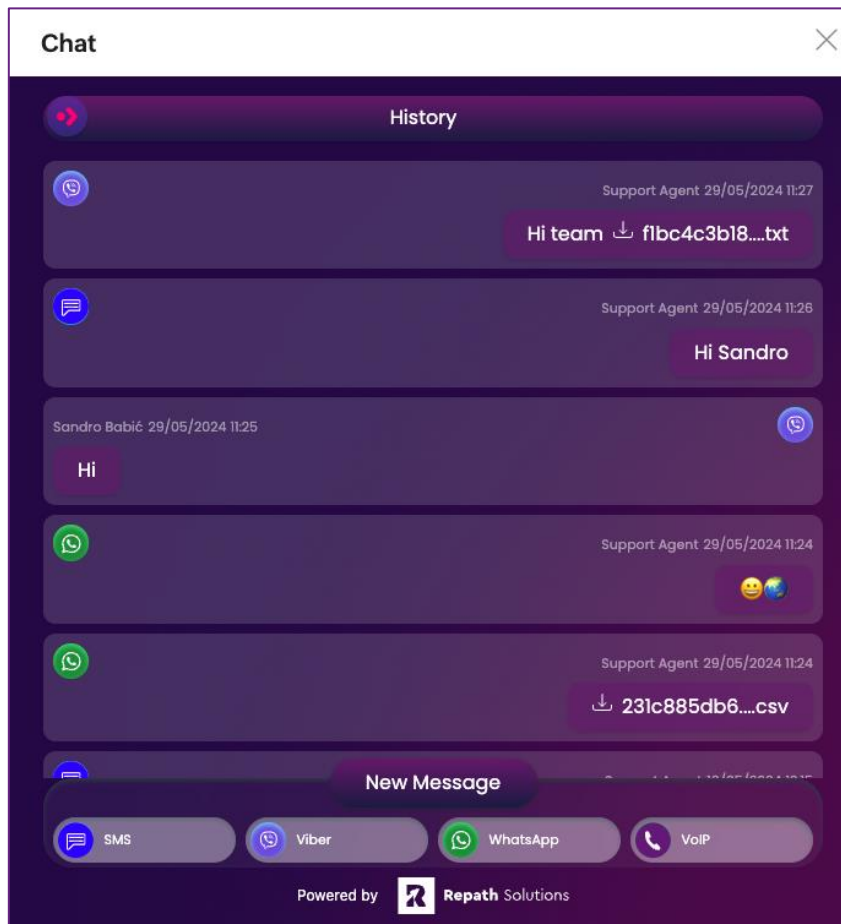
TWO-WAY MESSAGES (CHAT)

Sending two-way messages from Zoho CRM is **supported for Contacts and Leads** module. Choose between **SMS, WhatsApp or Viber**.

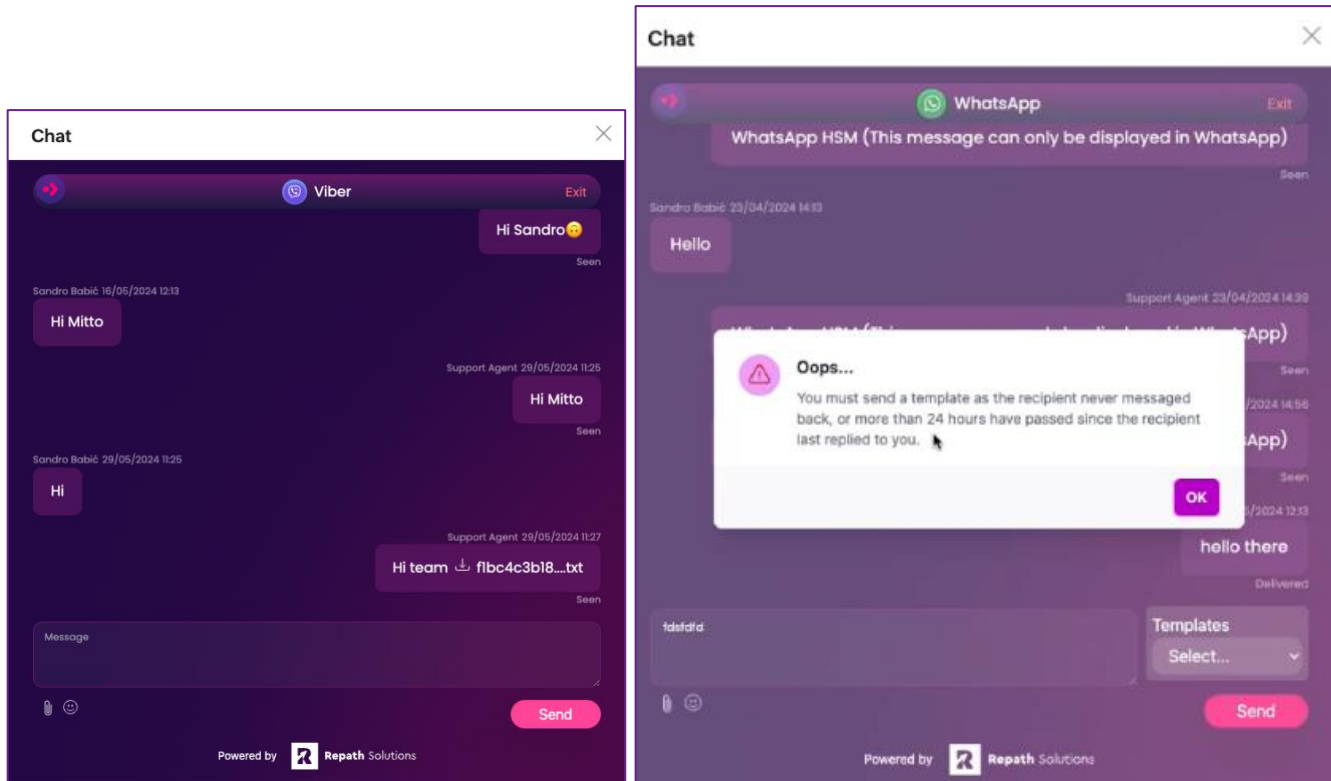
- Once you are inside those, simply **find a contact, click on Chat for that person**.



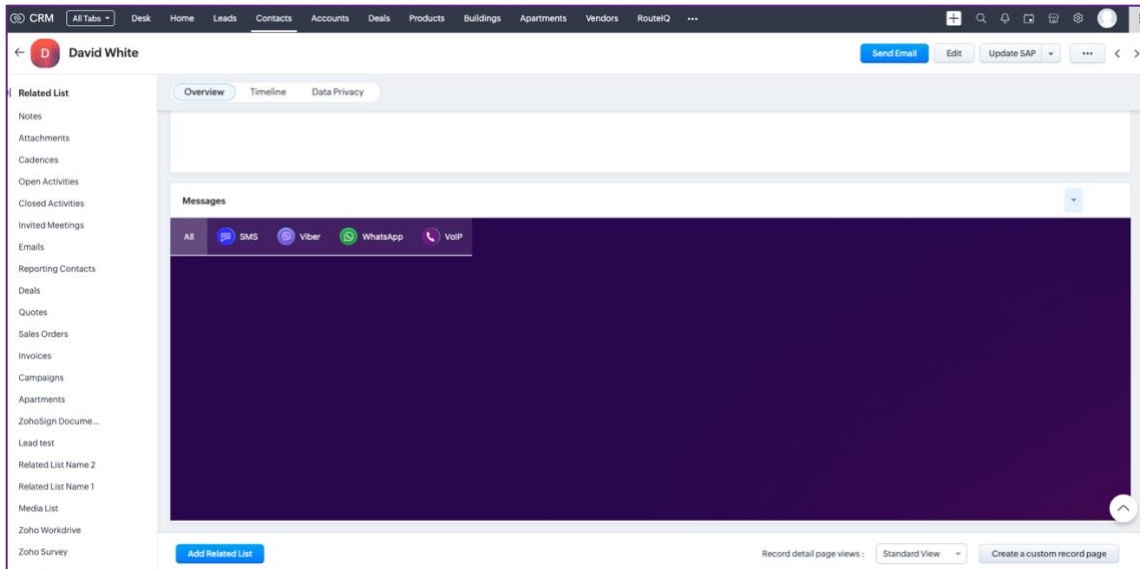
- A pop up will appear showing you **entire messaging history across all channels** for that specific person. Messages sent as a bulk action will also be visible here. You can filter conversations per channel by choosing one below.



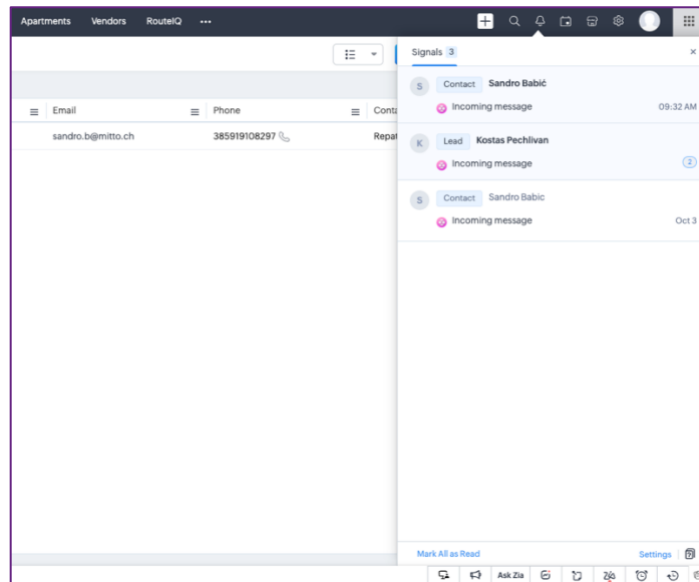
- Once you choose a channel, you can continue conversation.
 - Depending on the channel, you can **add text, attachment**, etc.
 - Please note, **WhatsApp conversation rules** apply (24h conversation window, user initiated vs. company initiated, templates).



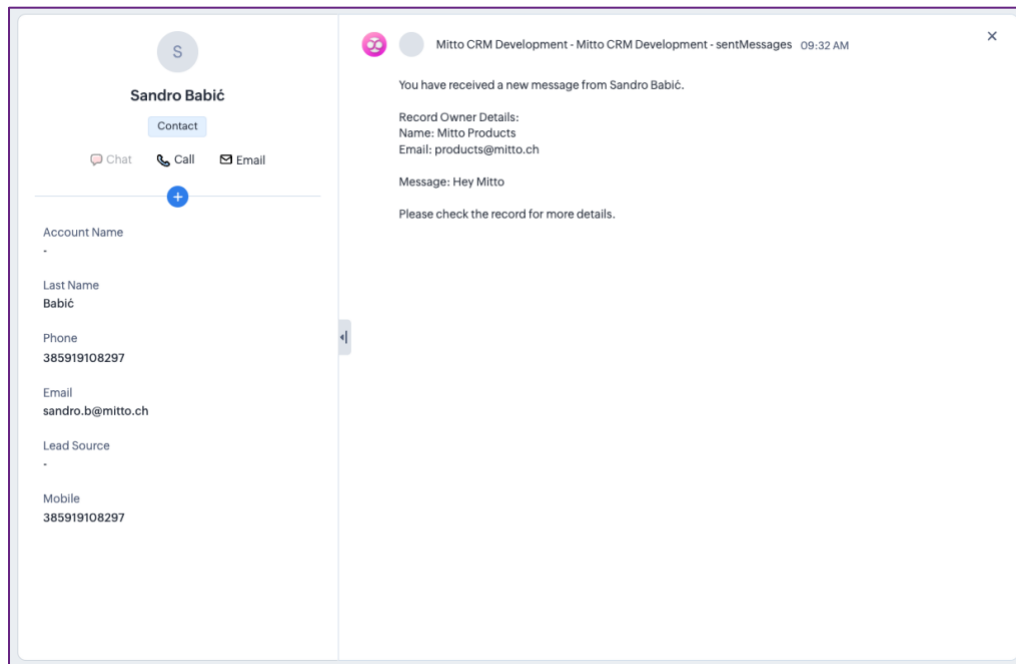
Note: you can find messaging history also once you open a contact, just scroll down and explore.



- 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).



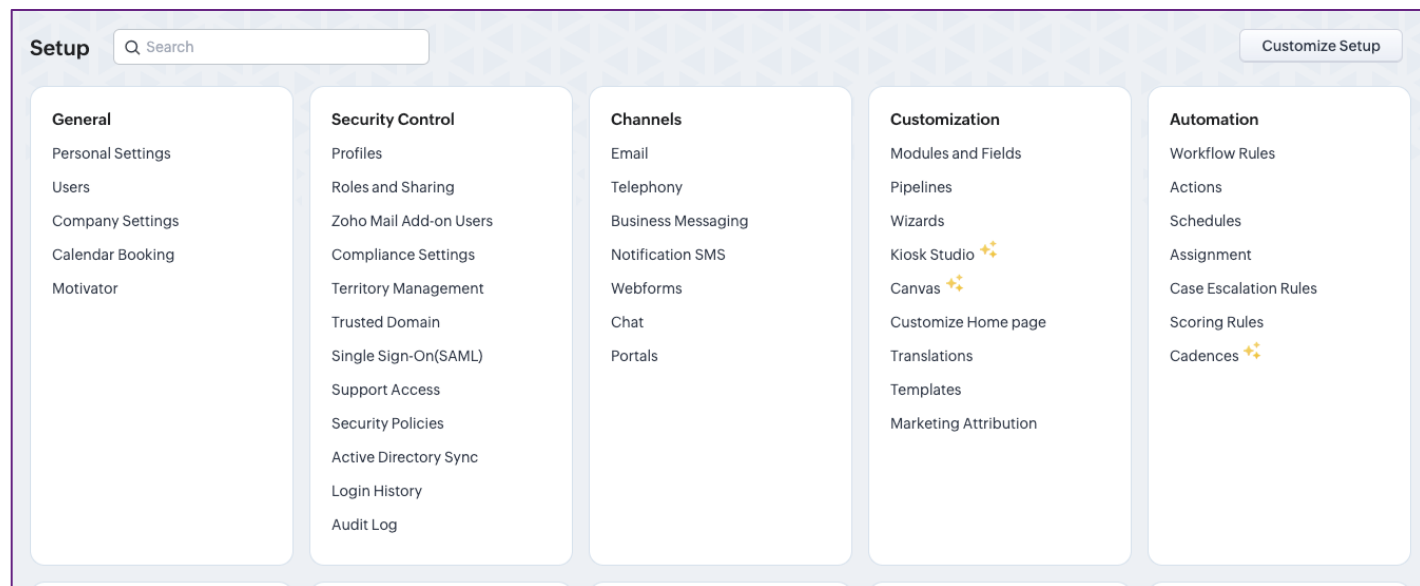
- Click on the notification to see more details.



AUTOMATIONS

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

- 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.

The image displays two side-by-side screenshots of the CRM workflow rule configuration interface. Both screenshots show the 'New contact created' rule configuration page. The left screenshot shows the 'WHEN' condition dropdown menu with options: Record action, Date/Time field, Record Score, and Record Notes. The right screenshot shows the 'WHEN' condition dropdown menu with options: Record action, Create (selected), Create or Edit, Edit, and Delete.

- 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.

The screenshot shows a CRM automation rule configuration page. At the top, there is a navigation bar with 'CRM' and various menu items like 'Desk', 'Home', 'Leads', 'Contacts', 'Accounts', 'Deals', 'Products', 'Buildings', 'Apartments', 'Vendors', and 'RouteIQ'. The main heading is 'New contact created' with a sub-heading '@ Contacts'. Below this, it states 'The rule executes when new contact is created'. The rule flow starts with a 'WHEN' trigger (a blue circle) with the text 'This rule will be executed when a contact is created.' This is followed by a 'CONDITION 1' (a blue diamond) with the text 'This rule will be executed for all contacts.' Below the condition, there are two action categories: 'Instant Actions' and 'Scheduled Actions'. The 'Instant Actions' menu is open, showing options: 'Field Update', 'Assign Owner', 'Tags', 'Notify', 'Activities', 'Create Record', 'Webhook', 'Function', 'Actions By Zoho Flow', and 'Custom Actions'. The 'Custom Actions' option is selected, and a sub-menu is open showing 'Preview(chat)' and 'SendMessage(chat)'. At the bottom left, there are 'Save' and 'Cancel' buttons. At the bottom right, there is a chat icon and the text 'Here is your Smart Chat (Ctrl+Space)'.

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**.

CRM | All Tabs | Desk | Home | Leads | Contacts | Accounts | Deals | Products | Buildings | Apartments | Vendors | RouteIQ | ...

← **New contact created**
@ Contacts
The rule executes when new contact is created

WHEN — This rule will be executed when a contact is created.

CONDITION 1 — This rule will be executed for all contacts.

Instant Actions
SendMessage(chat)
Send SMS
+ ACTION

Scheduled Actions

Save Cancel

Desk Channels Contacts Here is your Smart Chat (Ctrl+Space)

CRM | All Tabs | Desk | Home | Leads | Contacts | Accounts | Deals | Products | Buildings | Apartments | Vendors | RouteIQ | ...

Setup

Q Search

- General
- Security Control
- Channels
- Customization
- Automation
 - Workflow Rules**
 - Actions
 - Schedules
 - Assignment
 - Case Escalation Rules
 - Scoring Rules
 - Cadences
- Process Management
- Experience Center
- Data Administration
- Marketplace
- Developer Hub
- Zia
- CPQ

Rules Usage

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	<input checked="" type="checkbox"/>

Desk Channels Contacts Here is your Smart Chat (Ctrl+Space) Ask Zia

mitto➤