

Zoho crm extension for sending whatsapp message

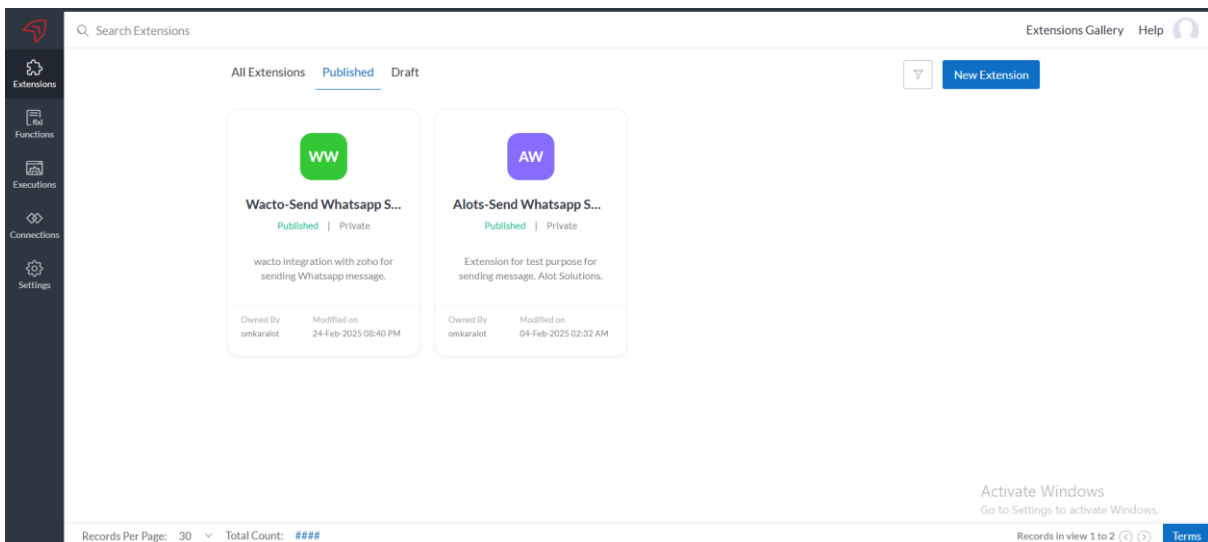
Introduction: This document describes the installation and use of extension for sending message on whatsapp via workflow automation rules and on button click from a record of a module.

Pre-requisites: Below are the pre-requisites for accessing and using this extension.

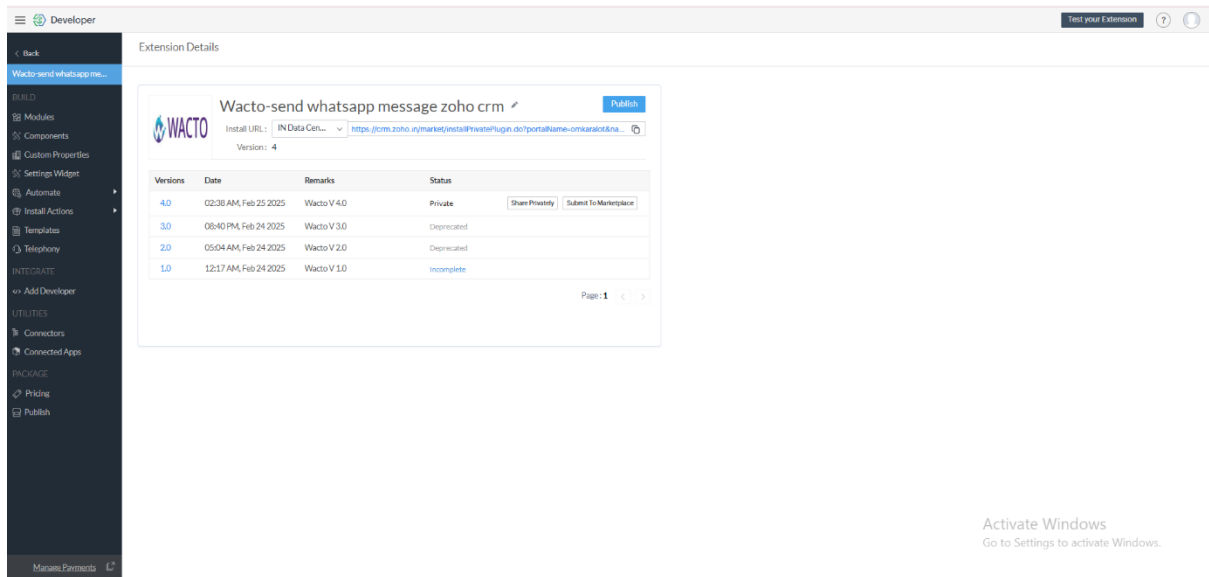
- Zoho crm enterprise account and valid credentials.
- Account and valid credentials of **WACTO** for whatsapp integration.
- Zoho crm sdk installation in code for accessing data of zoho crm account.

Installation from zoho sigma:

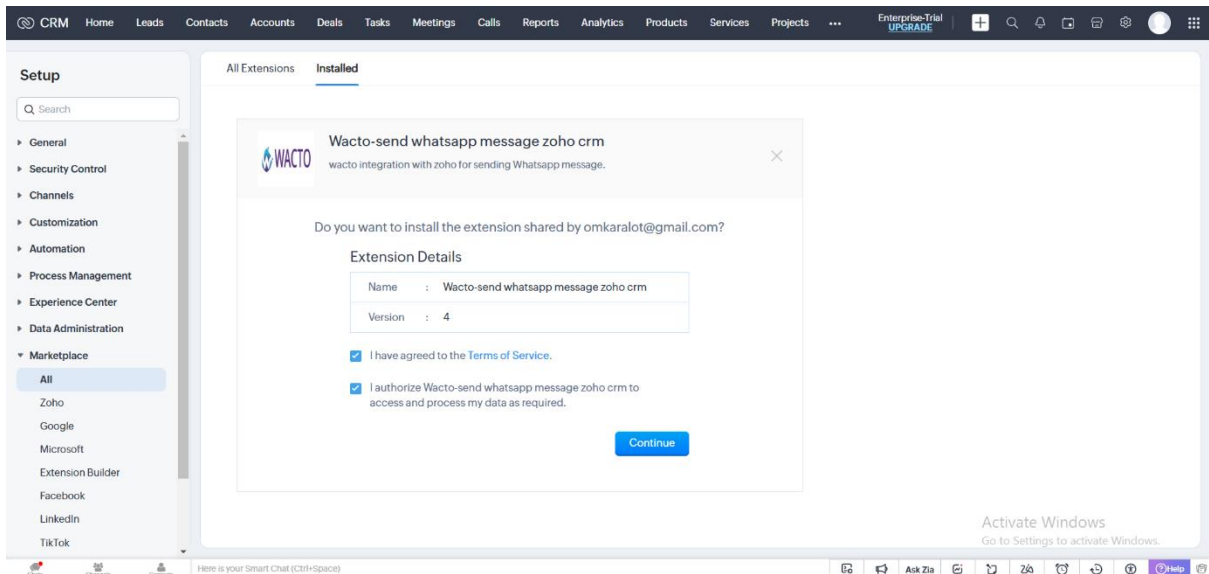
- Log in to zoho sigma account in which extension is developed for getting installation link. Log in details will be provided.
- Click on desired extension. User can select WACTO extension. As shown in below image.



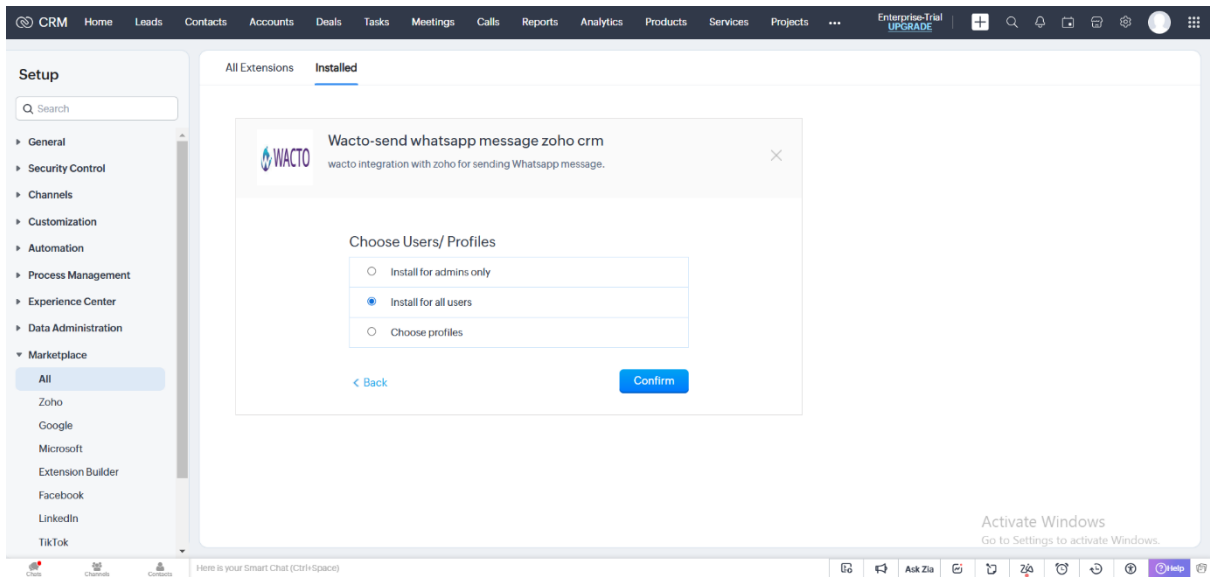
- Select the data centre in which crm account is available and copy the installation link.



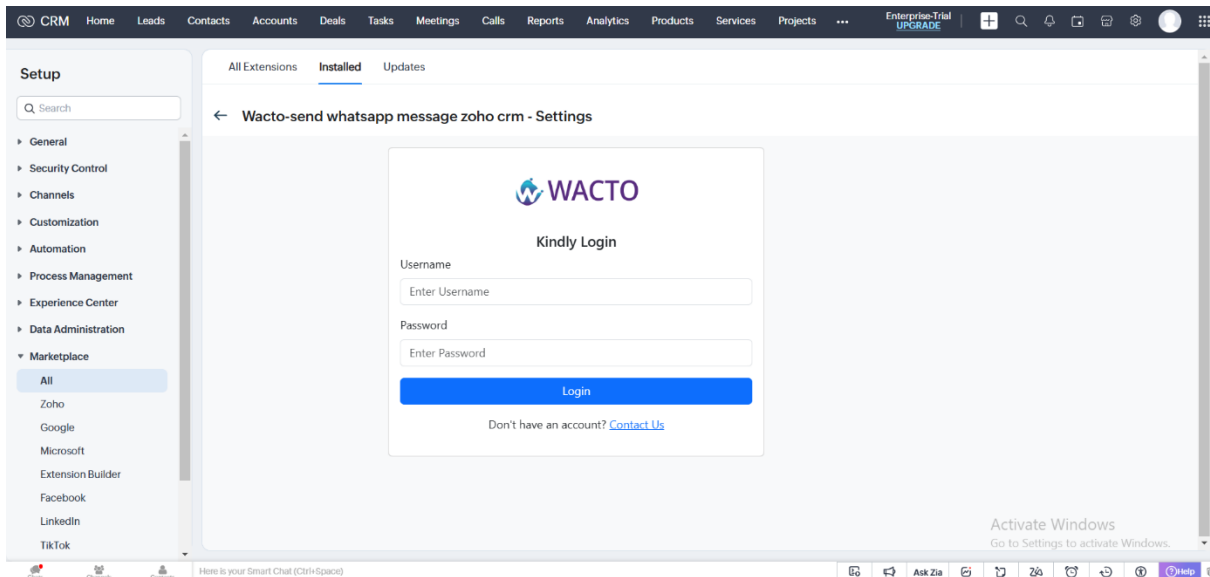
- Log in to zoho crm and paste the link in browser. Below installation page will be open.



- Click on continue and confirm installation by choosing user profiles.



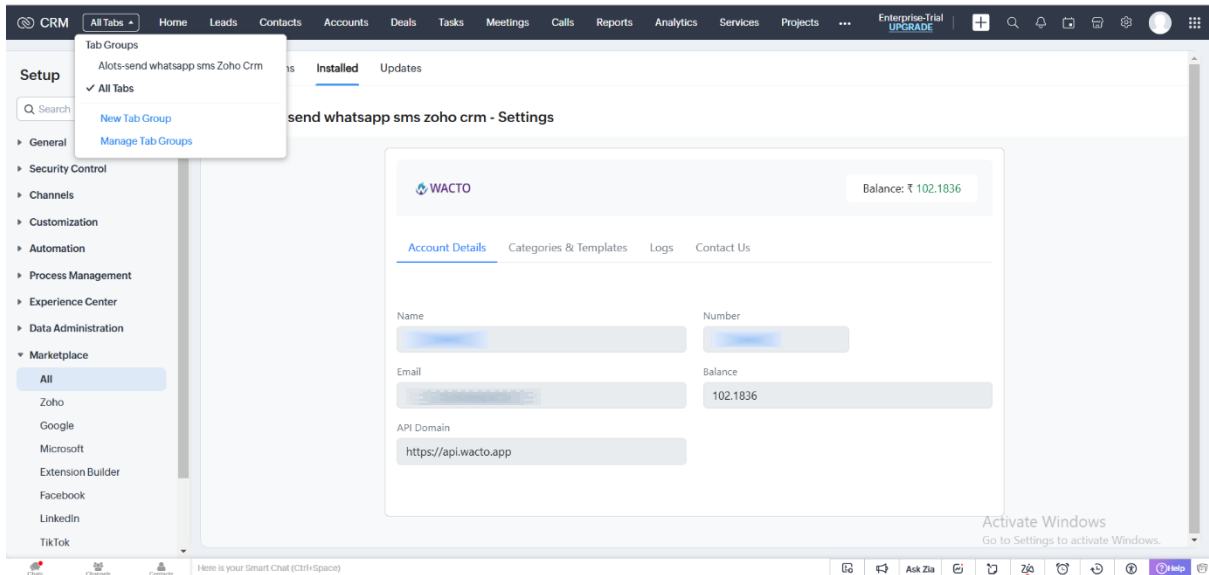
- Once extension installed successfully, go to extension settings page and log in with valid account credentials.



Go to profile in wacto.app at right top corner, click API , copy your api key and paste it in zoho where it is asking for API key. After pasting WACTO and ZOHO are

integrated.

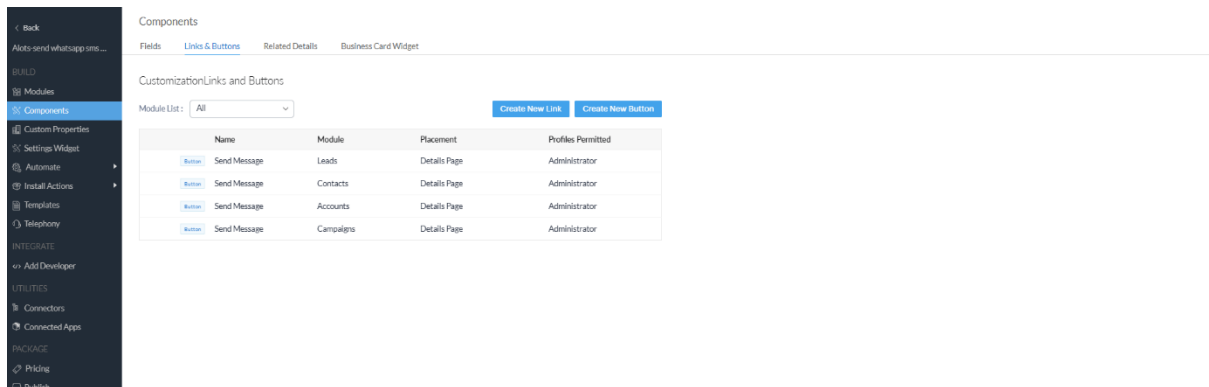
- Once user logged in successfully then user can access all the features of extension and send message on whatsapp.



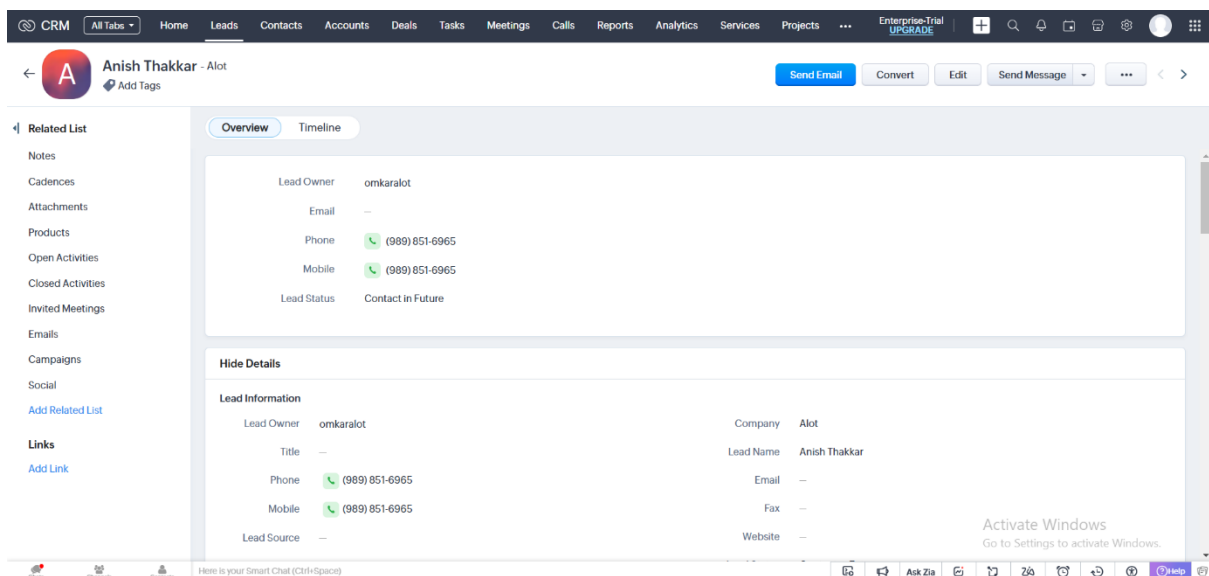
- **Note:** Once this extension is added into zoho marketplace then there is no need to perform above steps, user can directly install the extension from marketplace.

Usage: This section describes about how to use the extension after successfully installing it into crm account.

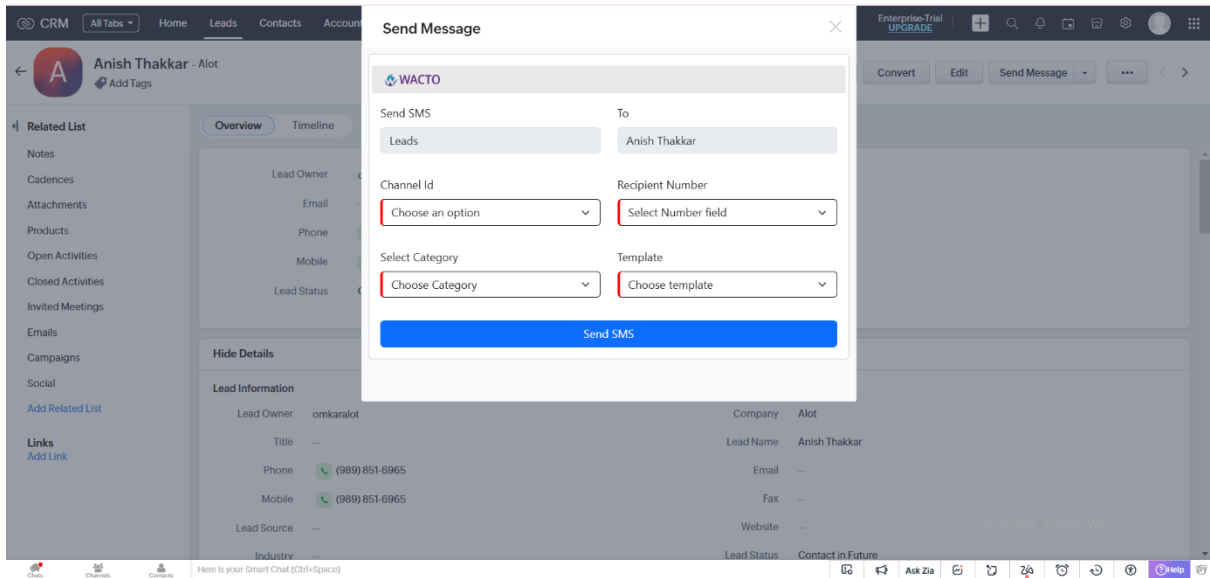
- **Send message on button click from the record of module.**
 1. There is a one component of this extension is **Send Message** button. This button will be available on view page of the records. This button is available for crm modules Leads, Contacts, Accounts and Campaigns. (Below image is just for a reference from zoho sigma displaying components)



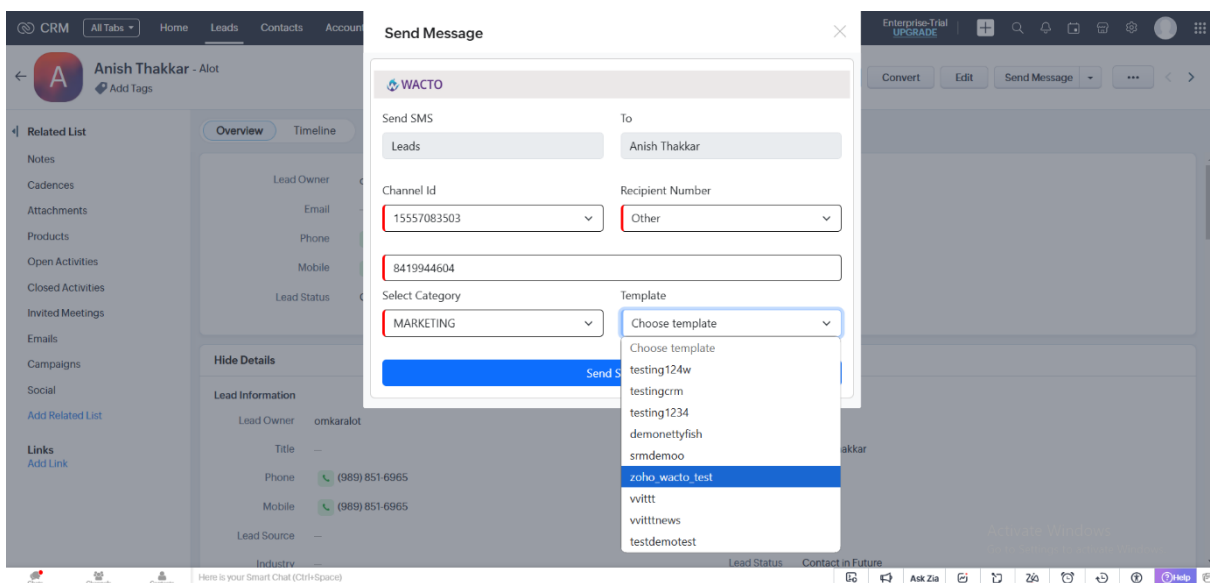
2. Send Message button will be displayed on view record page for each mentioned module.



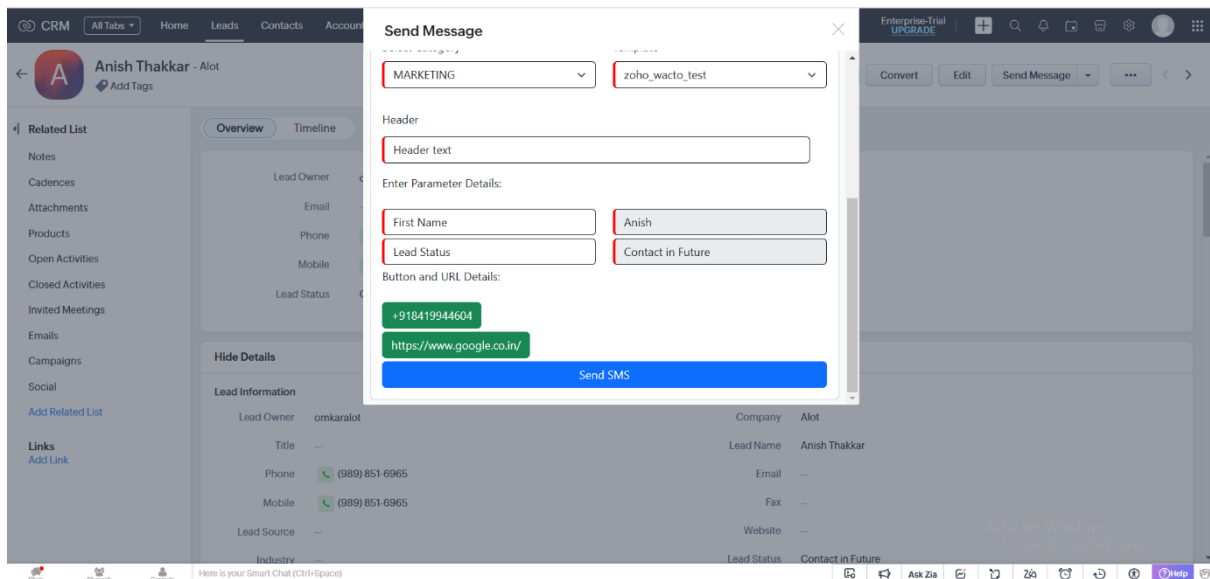
3. By clicking the button, below page will be opened for sending message on whatsapp.



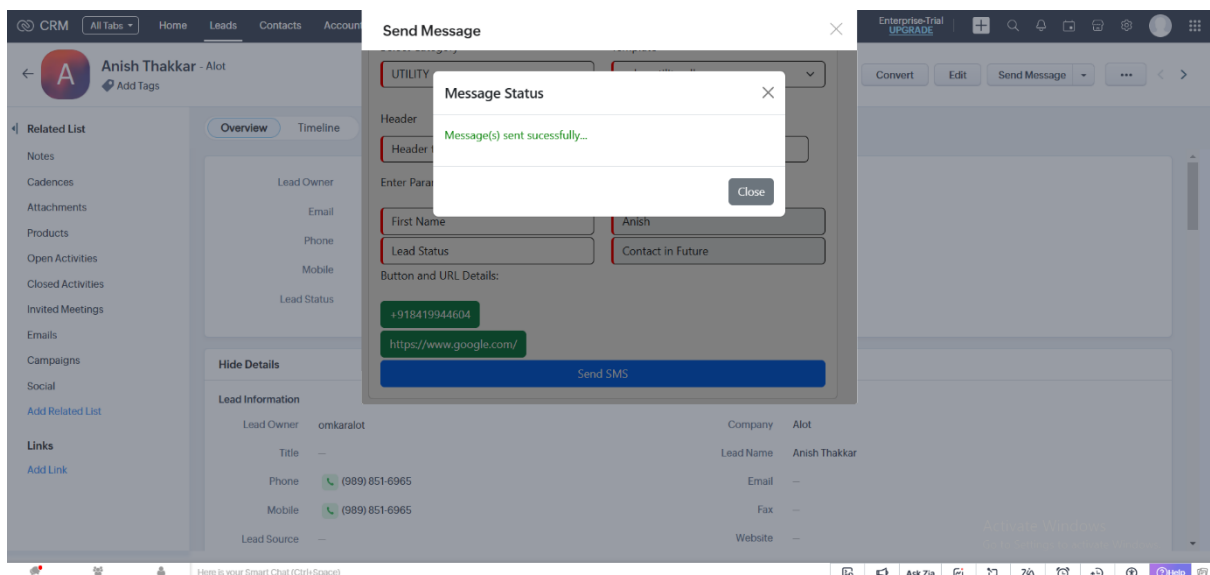
4. Select channel id, recipient number, category and template for sending message.



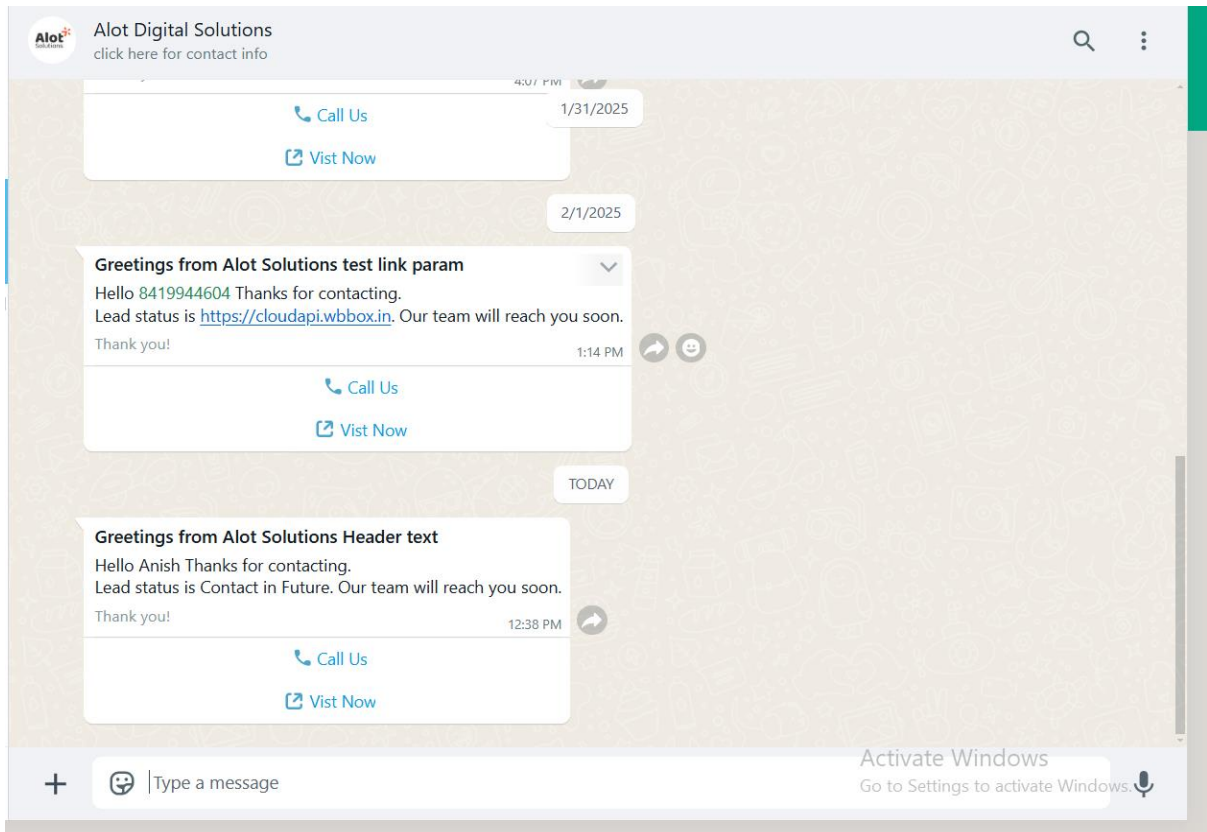
- Based on selected template header, parameters, button and url details will be displayed. Here user can select the values for parameters from provided dropdowns and also review it.



- After populating all the required details user can click on send SMS button to send message on whatsapp. User will receive a pop-up message as message sent successfully.. also user will receive message on whatsapp as per the template.

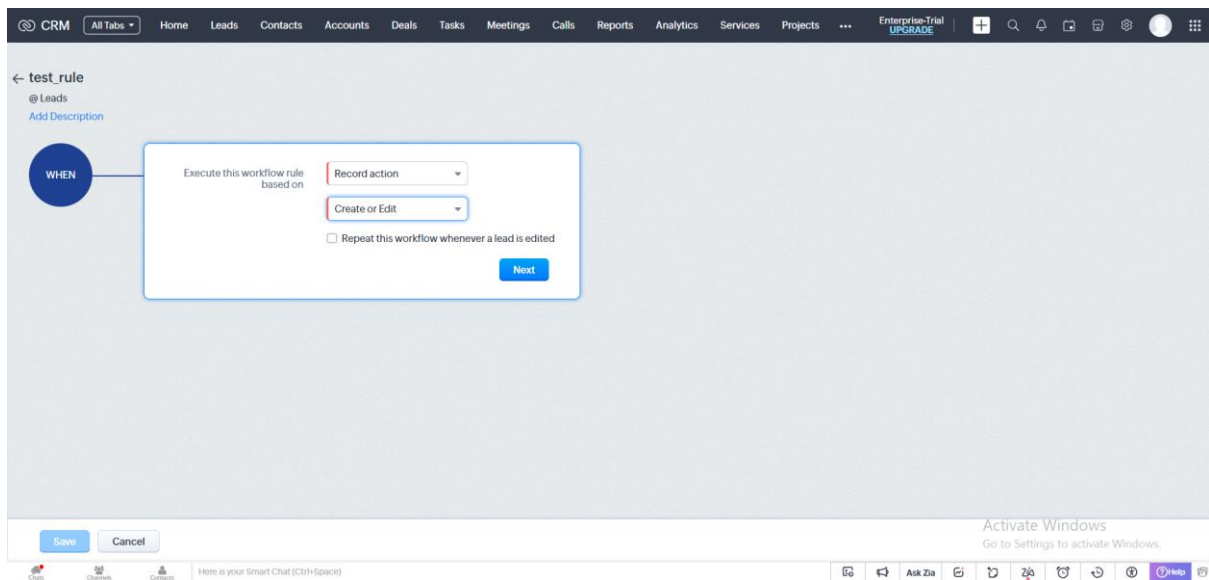


7. Message received on whatsapp.

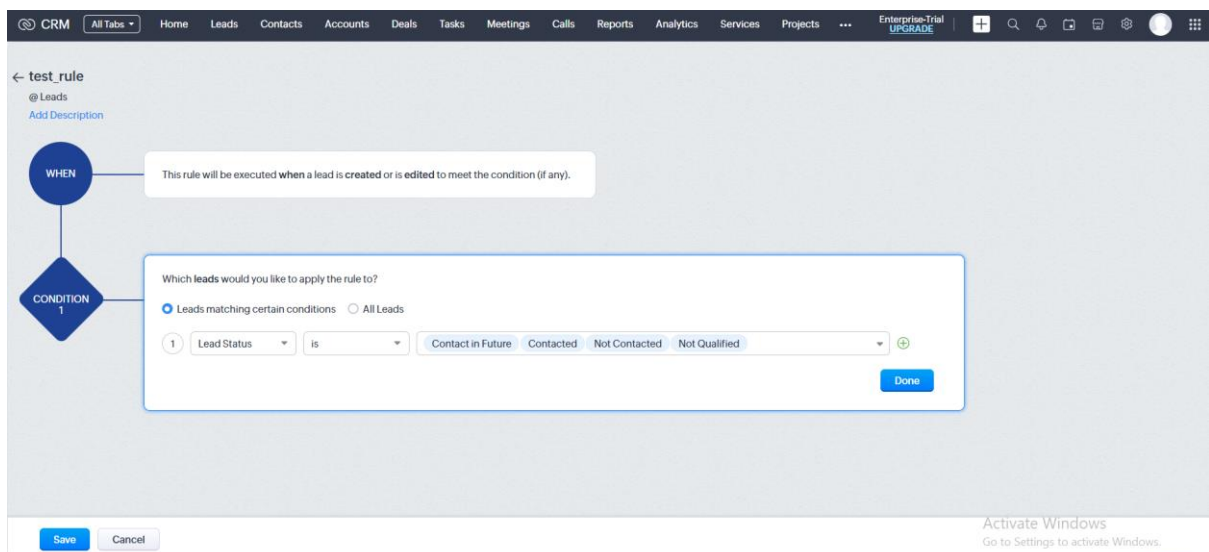


- **Send message using custom action from workflow rules.**

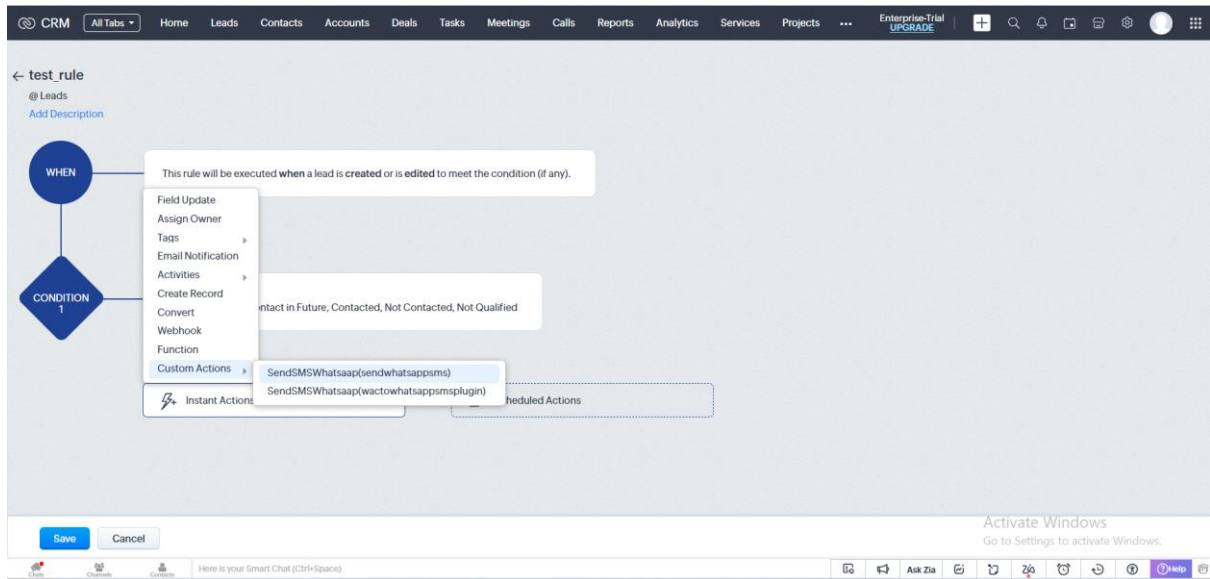
1. Go to settings and select workflow rules inside automation section.
2. Click on create rule and create a new rule by selecting a module. Below screen will be open.



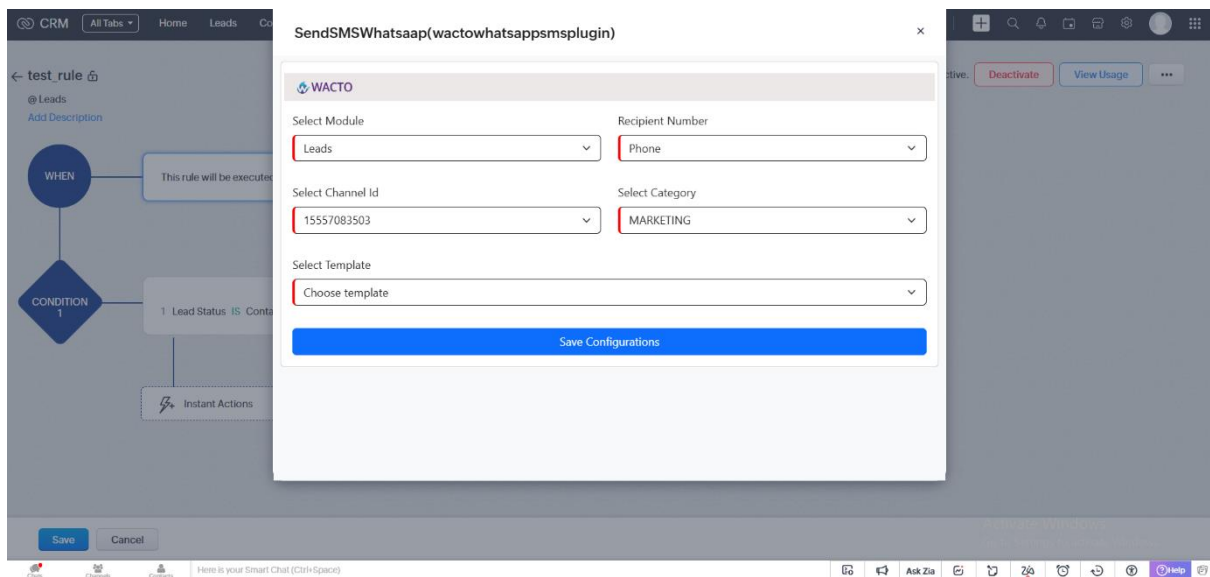
3. Click next and add conditions for executing rule.



4. Click done and select custom actions by clicking instant actions.

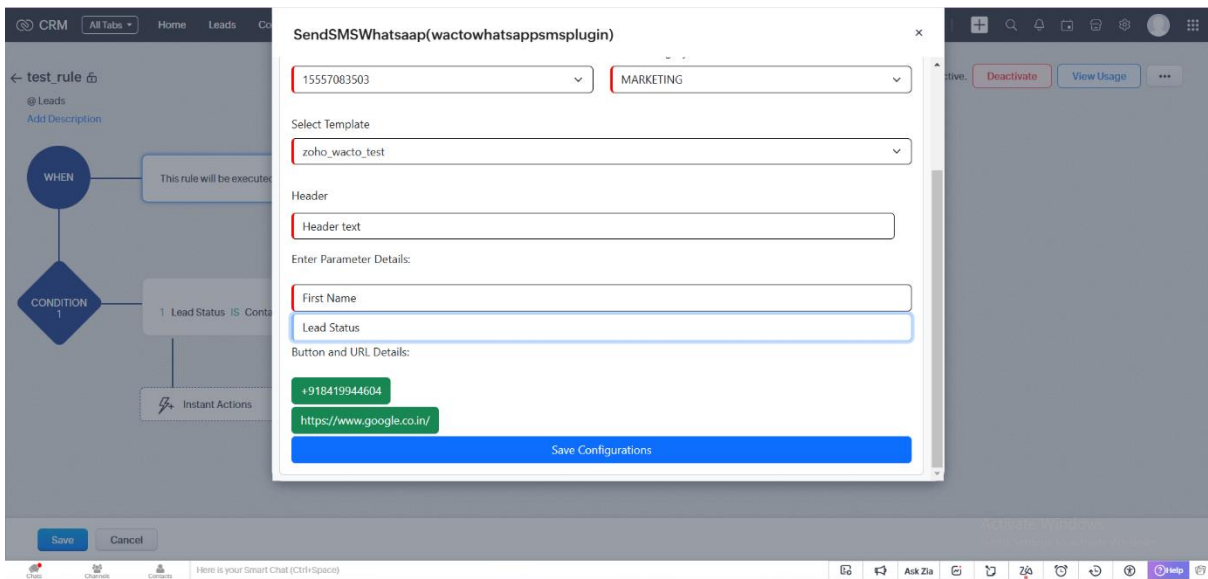


5. Select action sendSMSWhatsapp(WACTOwhatsappsmsplugin), below configuration page will be open.

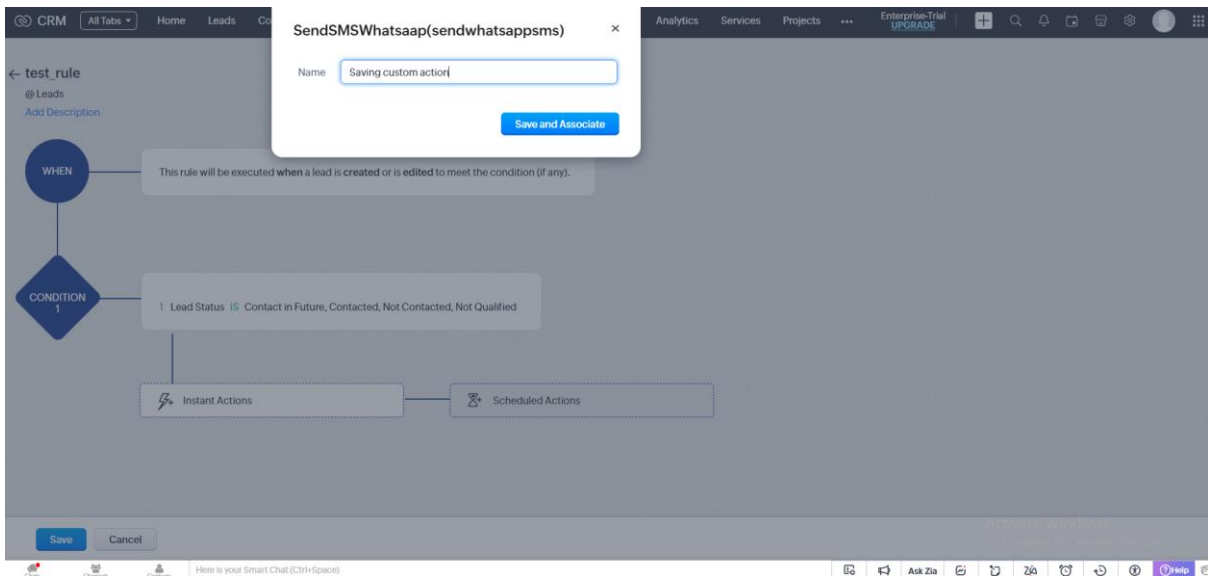


6. Select channel id, recipient number, category and template for sending message.

7. Based on selected template header, parameters, button and url details will be displayed. Here user can select the values for parameters from provided dropdowns.



8. After selecting all the required fields and values click on Save Configuration button. Below page will be open.



9. Click on Save and Associate and again click on save button available in bottom of the rule page.
10. New rule with custom action will be saved in rules as shown in below image.

Setup

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.

<input type="checkbox"/>	Rule Name	All Modules	Execute On	Actions	Modified On	Status
<input type="checkbox"/>	Big Deal Rule	Deals	Create or Edit	1	Jan 15, 2025	On
<input type="checkbox"/>	Send sms on whatsapp	Leads	Create or Edit	0	Feb 24, 2025	On
<input type="checkbox"/>	send sms from contact module	Contacts	Create or Edit	0	Jan 28, 2025	On
<input type="checkbox"/>	New Rule	Accounts	Create or Edit	0	Jan 28, 2025	On
<input type="checkbox"/>	test_rule	Leads	Create or Edit	1	Feb 25, 2025	On

Rule Name
test_rule

Activate Windows
Go to Settings to activate Windows.

https://crm.zoho.com/crm/org876217609/settings/workflow-rules/619091500000827003

11. This rule will be executed whenever predefined conditions will be satisfied and configured message will be sent to user on whatsapp.