



D7SMS Extension for ZohoCRM

Overview

D7 SMS integration with Zoho CRM creates an efficient 2-way communication channel between Zoho CRM and your customers. Direct7 Networks provides highly reliable and cost-effective communication solutions to businesses across all industries. D7 specialises in providing worldwide SMS transmission using D7's own connectivity to global mobile network operators.

Key Features

- Two-way SMS with push notification on ZohoCRM.
 - Send personalized SMS within each Contact, Lead and Deal.
 - Bulk messages to your Contacts, Leads and Deals in a single click.
 - Advanced SMS templates with dynamic fields and convert to template feature
 - SMS Scheduling with a detailed report on the Websender panel.
 - Receive detailed SMS alerts to multiple agent contact numbers when a new Lead, Contact or Deal is created.
 - Automated welcome SMS to new Lead, Contact or Deal when it's created
 - SMS Opt-out option for each Lead & Contact which is also then mapped with Deal module.
 - An integrated SMS Activities report inside ZohoCRM and also externally hosted a dedicated portal for Reports.
 - SMS history under each contact and lead
 - Unlimited Email alerts for incoming SMS
 - Custom Function script for automate the business process
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Video Tutorial

Click on the following link for detailed instructions and tutorial

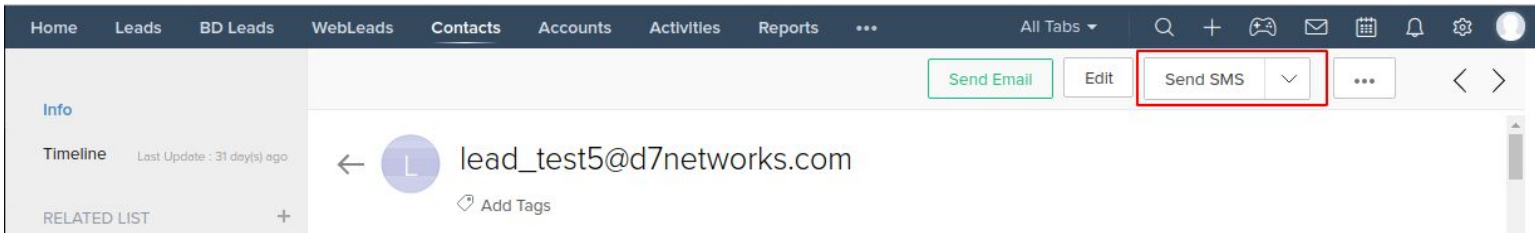
<https://youtu.be/WYYuNOC6OIo>

Installation and configuration

1. Install the extension from Zoho marketplace
 - 1.1. Open Zoho CRM and Navigate to Settings > Marketplace > All
 - 1.2. Search for D7SMS
 - 1.3. Select D7SMS and follow on-screen instructions to complete the installation
 2. Collect API Details from [D7Website](#)
 - 2.1. Signup at <https://d7networks.com/accounts/signup/>
 - 2.2. Navigate to <https://d7networks.com/accounts/profile/> and click on “API details”
 3. Update API Details on the extension
 - 3.1. Navigate to Settings > Marketplace > All > Installed > D7SMS > Configure
 - 3.2. Click on Edit symbol next to “Extension Settings”
 - 3.3. Update “**API Username**” and “**API Password**” with the API Details received.
 - 3.4. Default value of “**Msg From**” is “**D7-Zoho**”. If you purchased SenderID or a dedicated number you can add it here.
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Send SMS

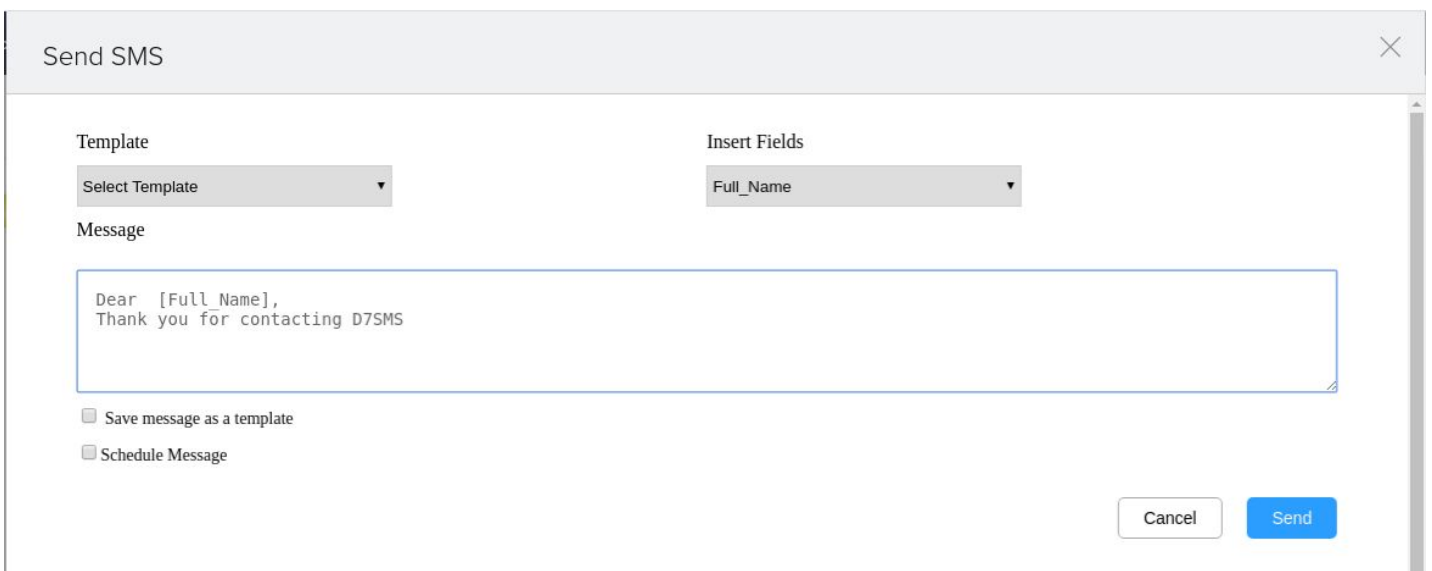
- Navigate to a Contact, Lead or Deal
- **Send SMS** option will be available on the top right side.



- If the **"Send SMS"** button is not listed on top, you can find it on the submenu. Click on the button as given in the following image and the **"Send SMS"** option will be available on the menu list.



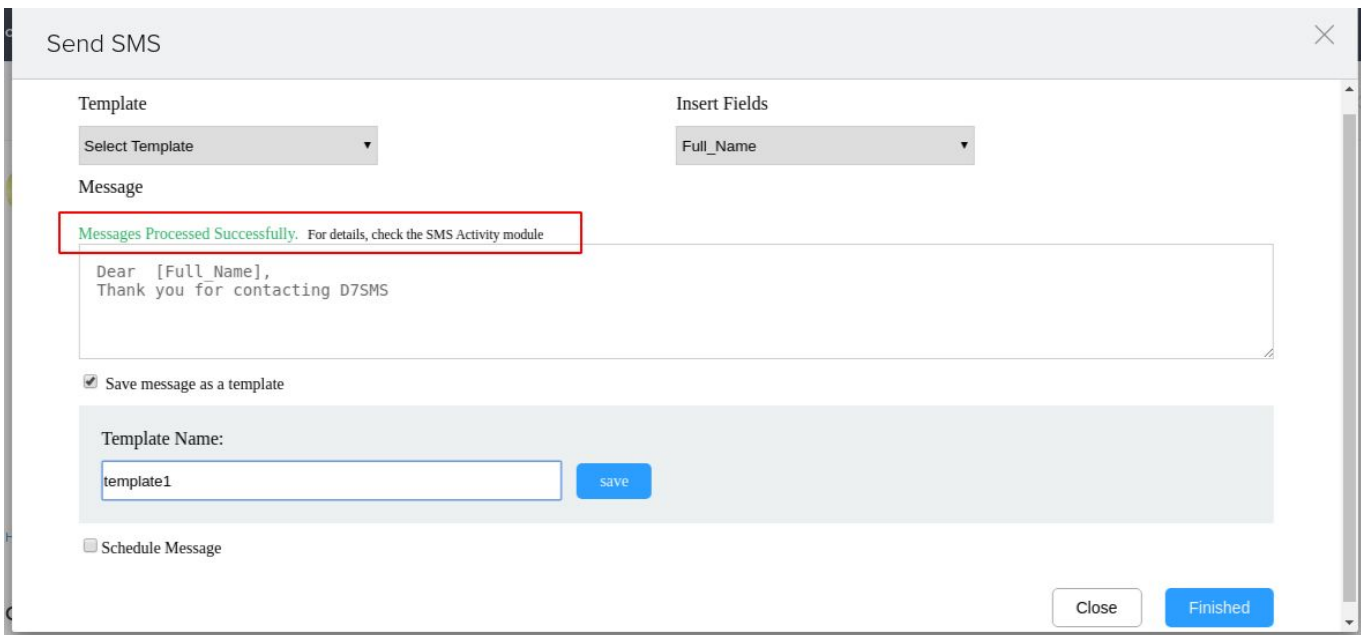
- After click on **"Send SMS"** a Popup window will be opened with multiple options, and each explained here:



The 'Send SMS' popup window has a title bar with a close button. It contains the following fields and options:

- Template:** A dropdown menu with 'Select Template' as the current selection.
- Insert Fields:** A dropdown menu with 'Full_Name' as the current selection.
- Message:** A text area containing the message: 'Dear [Full Name], Thank you for contacting D7SMS'.
- Options:** Two checkboxes: 'Save message as a template' and 'Schedule Message', both of which are currently unchecked.
- Buttons:** 'Cancel' and 'Send' buttons at the bottom right.

- **Select Template:** Choose an already created template (if created any)
 - **Insert Fields:** Insert Dynamic fields to Message content. Available dynamic fields are listed here.
 - **Message:** This will be the SMS Body
 - **Save Message As template:** Save current message content as a template. This is the easiest way to create templates with dynamic variables
 - **Schedule Message:** Schedule message to send later.
- Once the message is composed you can click on “Send” and you will receive a status message on the same window. Also, you can get a detailed report from the “**SMS Activity**” module.

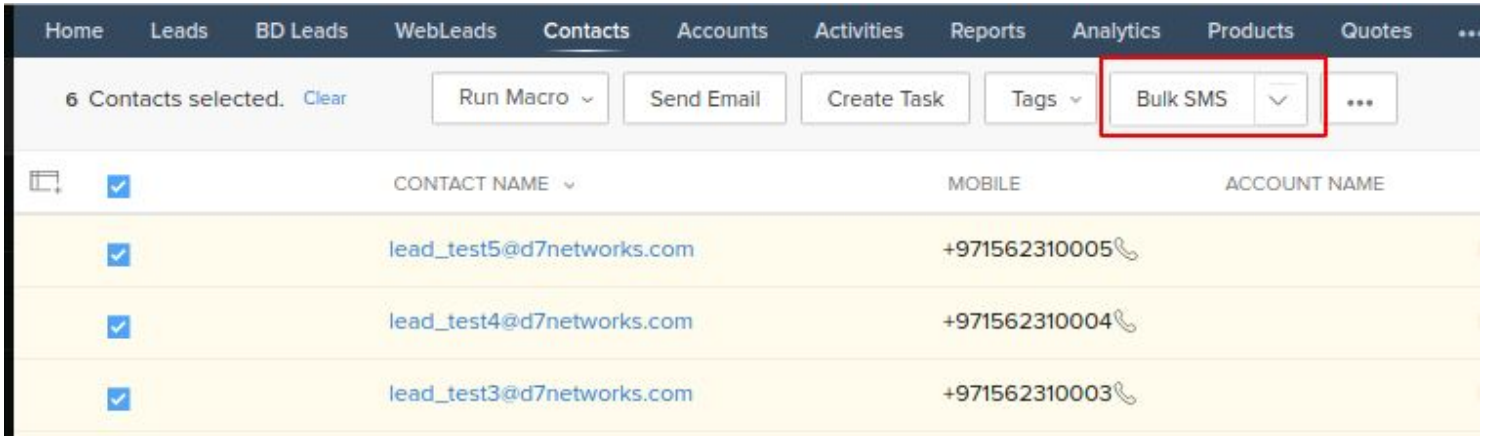


The screenshot shows a 'Send SMS' window with the following elements:

- Template:** A dropdown menu with 'Select Template'.
- Insert Fields:** A dropdown menu with 'Full_Name'.
- Message:** A text area containing 'Dear [Full Name], Thank you for contacting D7SMS'. A red box highlights a green status message: 'Messages Processed Successfully. For details, check the SMS Activity module'.
- Save message as a template:** A checked checkbox.
- Template Name:** A text input field with 'template1' and a blue 'save' button.
- Schedule Message:** An unchecked checkbox.
- Buttons:** 'Close' and 'Finished' buttons at the bottom right.

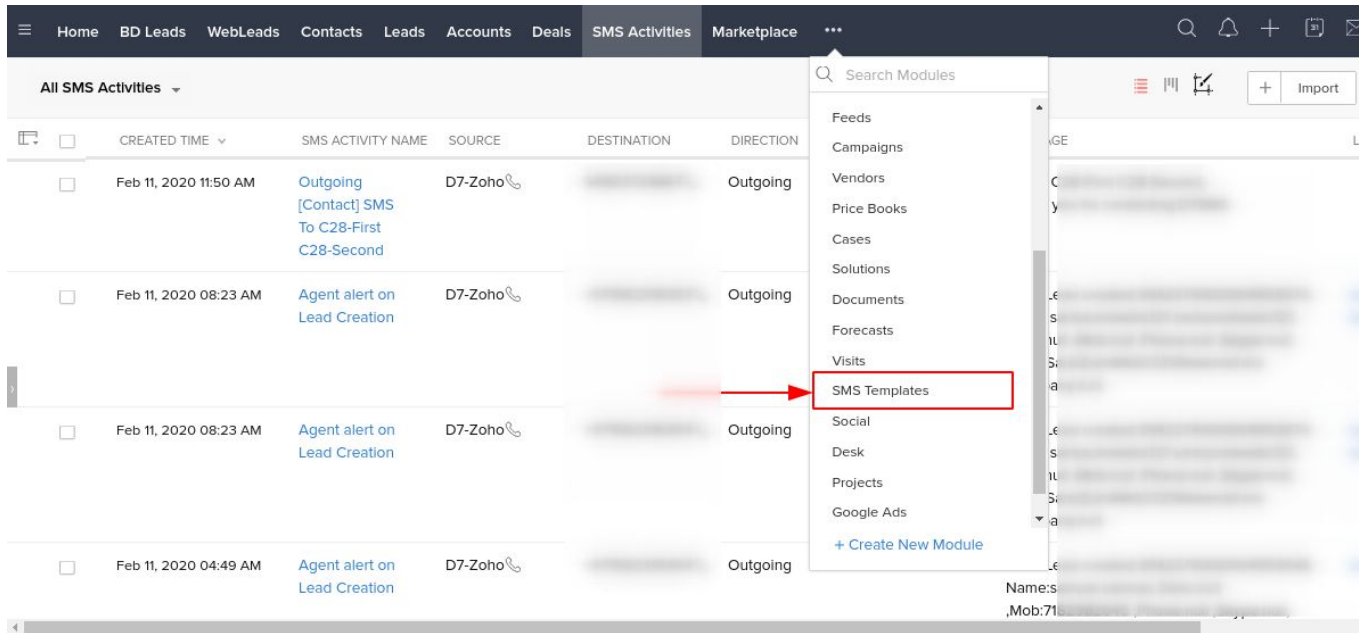
Bulk SMS

- Navigate to Contacts, Leads or Deals modules Page.
- Select a few contacts and "**Bulk SMS**" option will be displayed on top

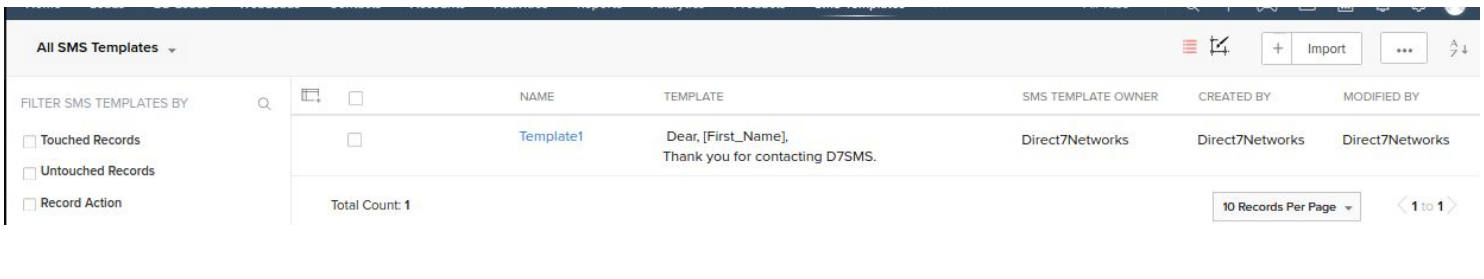


SMS Templates

- You can access "**SMS Templates**" from the modules list, and if not listed in the main modules section you can get it from Submenu.

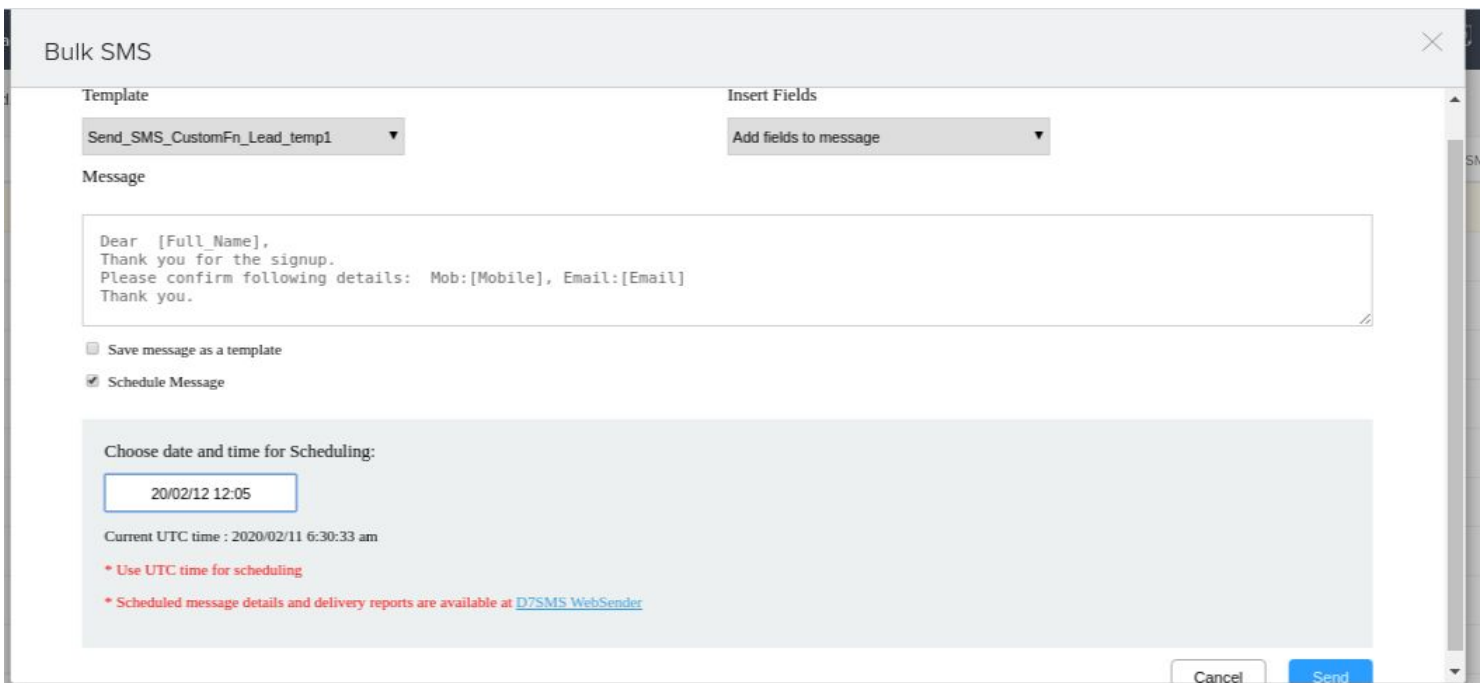


- Here, you will be having read, write, delete and modify permission over all the templates used by the SMS module
- Templates can also be saved from **Send SMS** and **Bulk SMS** windows.



All SMS Templates						
FILTER SMS TEMPLATES BY	NAME	TEMPLATE	SMS TEMPLATE OWNER	CREATED BY	MODIFIED BY	
<input type="checkbox"/> Touched Records <input type="checkbox"/> Untouched Records <input type="checkbox"/> Record Action	Template1	Dear, [First_Name], Thank you for contacting D7SMS.	Direct7Networks	Direct7Networks	Direct7Networks	
Total Count: 1						10 Records Per Page < 1 to 1 >

SMS Scheduling



Bulk SMS

Template: Send_SMS_CustomFn_Lead_temp1

Insert Fields: Add fields to message

Message:

Dear [Full Name],
Thank you for the signup.
Please confirm following details: Mob:[Mobile], Email:[Email]
Thank you.

Save message as a template

Schedule Message

Choose date and time for Scheduling:

20/02/12 12:05

Current UTC time : 2020/02/11 6:30:33 am

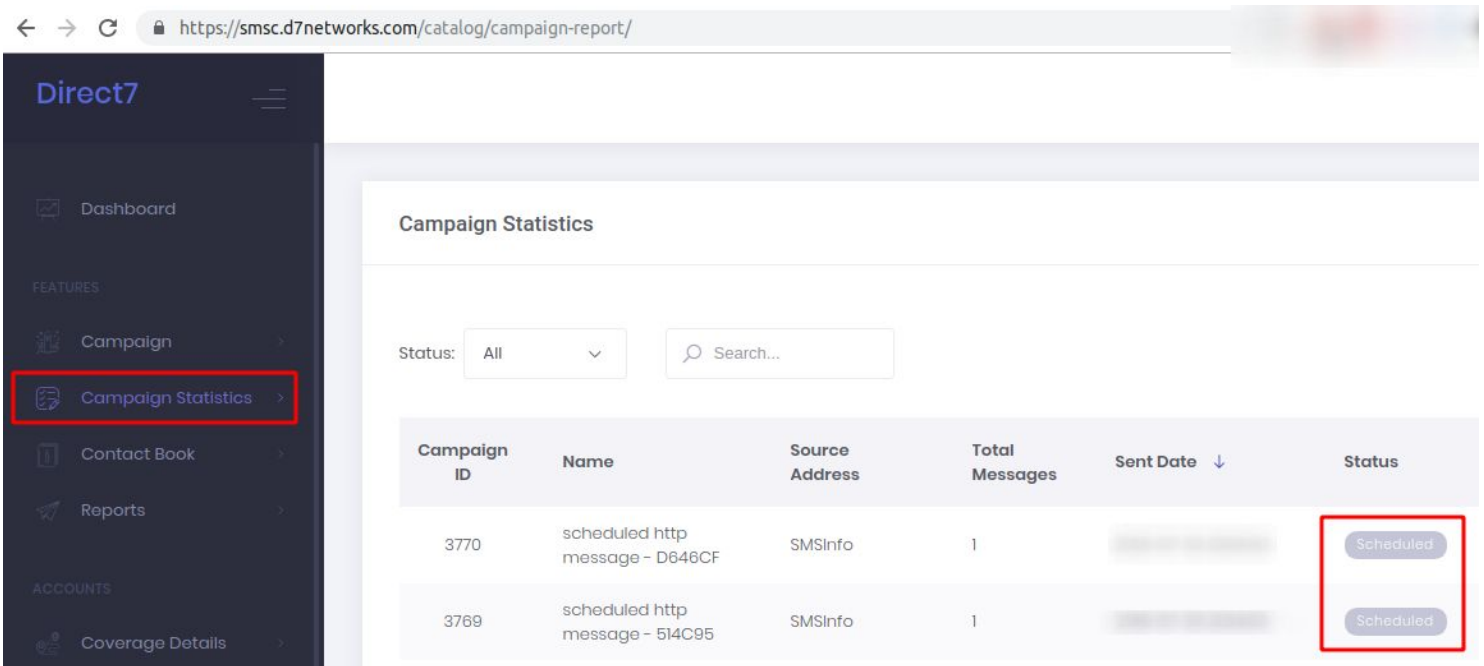
* Use UTC time for scheduling

* Scheduled message details and delivery reports are available at [D7SMS WebSender](#)

Cancel Send

- The SMS Scheduling feature is available for both Single SMS and Bulk SMS options.
- You can find the **“Schedule Message”** checkbox on the SMS compose popup window.
- Once the **“Schedule message”** option is checked (ticked), the scheduler will ask to **“Choose date and time for Scheduling”**.

- Please use the UTC time for scheduling since we schedule the messages on the endpoint for avoiding restrictions inside ZohoCRM.
- Scheduled messages will be stored in [D7SMS Websender](#) and you can log in here with your API username and API password



https://smsc.d7networks.com/catalog/campaign-report/

Direct7

Dashboard

FEATURES

Campaign

Campaign Statistics

Contact Book

Reports

ACCOUNTS

Coverage Details

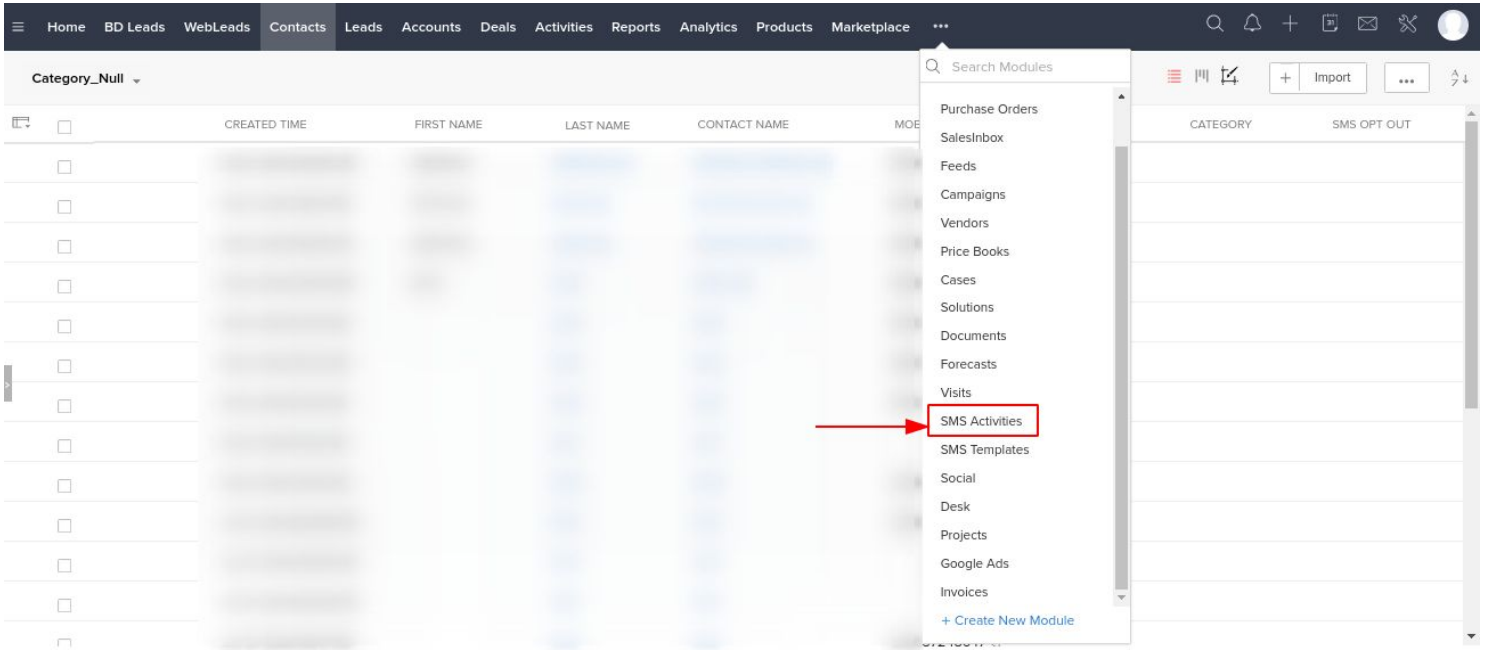
Campaign Statistics

Status: All

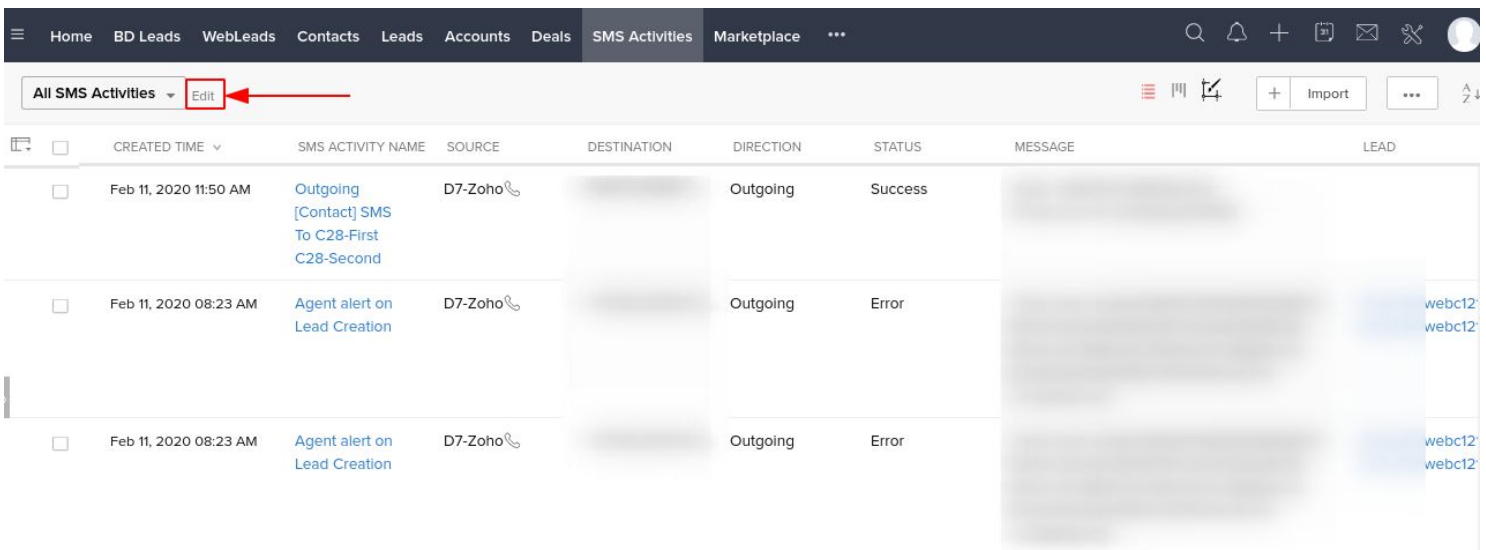
Campaign ID	Name	Source Address	Total Messages	Sent Date ↓	Status
3770	scheduled http message - D646CF	SMSInfo	1		Scheduled
3769	scheduled http message - 514C95	SMSInfo	1		Scheduled

Reports - SMS Activities

- **SMS Activities** provides a detailed report of all the SMS activity which is happening under this extension.
- You can access "**SMS Activities**" from the modules list, and if not listed in the main modules section you can get it from Submenu.



- You can customize the Report view by clicking on the edit button next to **"All SMS Sent"**



- The same report can be accessed under each Contact and Leads

Home BD Leads WebLeads **Contacts** Leads Accounts Deals SMS Activities Marketplace ...

C28-First C28-Second Send Email Edit Send SMS ...

SMS History010 + Assign + New Edit Customize View

Created Time	SMS Activity Name	Source	Destination	Direction	Status	Message
Feb 11, 2020 11:50 AM	Outgoing [Contact] SMS To C28-First C28-Second	D7-Zoho	94903724867	Outgoing	Success	Dear C28-First C28-Second, Thank you for contacting D7SMS
Feb 10, 2020 03:44 PM	SMS Generated from Custom function	D7-Zoho	94903724867	Outgoing	Success	TEST Content

Agent Alerts

- ZohoCRM administrators or agents can receive SMS when there is a new entry creation that occurs in Lead, Contact or Deal module in the ZohoCRM.
- CRM Administrator can configure N number of agent mobile numbers to receive the alert.

Extension Settings

API Username

API Password

Msg From **D7-Zoho**

Agent Alert - Contact	+971562316353,+971562316354
Agent Alert - Lead	+971562316353,+971562316354
Agent Alert - Deal	+971562316353,+971562316354

Incoming WebHook URL **https://platform.zoho.com/crm/v2/functions/d7sms__mosms/actions/execute?auth_type=apikey&zapikey=1001.eebf5df6e981d05f02d7c4cb79ed3aad.2e84b5ce364ff342a0d912b3ca7b6a1**

Autogenerated SMS to new Lead - Content **SKIP**


Autogenerated SMS to new Contact - Content **SKIP**

- Following is the sample text for new Contact creation.

#	Source	Destination	Message	Sent Date ↓
834f... 28cf- 43e5- 9303- c5b4...	SMSInfo	971562316354	New Contact created:394227400... Name:Lead01, Desc:Direct7Test lead - d7networks.com ,Mob:+971562316353 ,Phone:null, Source:Cold Call	
			New Contact	

SMS Opt-out

- Maybe few of the customers do not prefer SMS communication so that we can exclude them by enabling opt-out for them.
- So that when we send bulk messages opt-out customers will be skipped
- The opt-out option is available under each Contact and Lead.
- For Deal module, it will be checking the linked Contact or Lead opt-out status

←  Lead01


Send Email
Edit
Send SMS
▼

Modified By **Direct7Networks**
Mon, 29 Jul 2019 09:51 PM

SMS Opt Out

Asst Phone —

Email Opt Out —

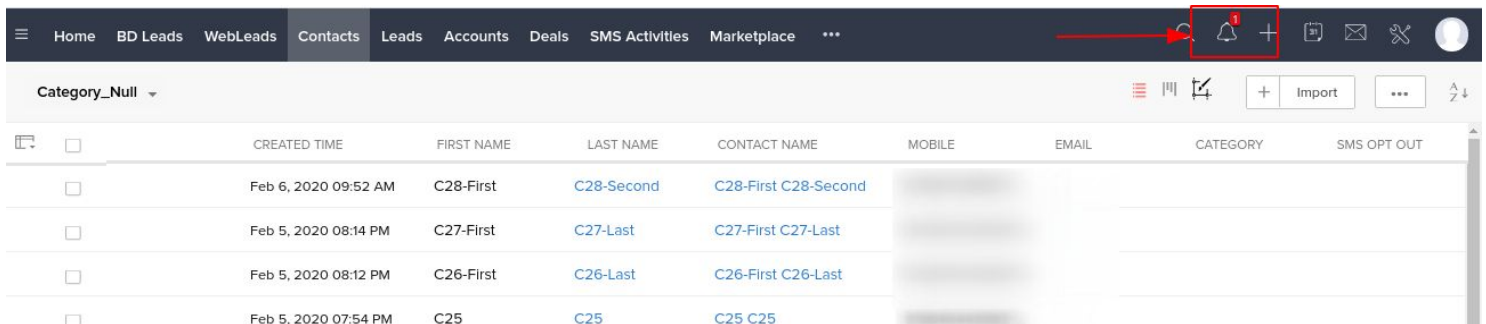
Skype ID **d7networks** 

Secondary Email —

Twitter —

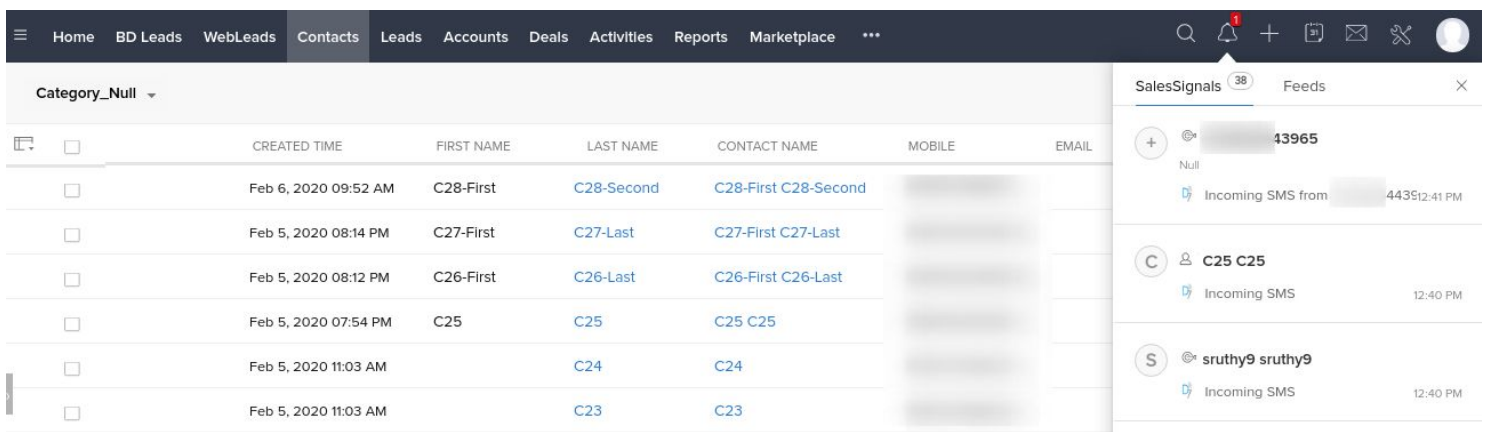
Incoming SMS

- Zoho CRM users can receive incoming sms on their CRM by adding one or more dedicated numbers.
- Incoming SMS is delivered to ZohoCRM using the WebHook URL. You must update it on the D7 control panel to receive incoming SMS.
- Also, you can email this link with API username to support@d7networks.com, and the support team will configure it for you.
- Customers will receive sales Signal notification whenever a new incoming sms is received.



CREATED TIME	FIRST NAME	LAST NAME	CONTACT NAME	MOBILE	EMAIL	CATEGORY	SMS OPT OUT
Feb 6, 2020 09:52 AM	C28-First	C28-Second	C28-First C28-Second				
Feb 5, 2020 08:14 PM	C27-First	C27-Last	C27-First C27-Last				
Feb 5, 2020 08:12 PM	C26-First	C26-Last	C26-First C26-Last				
Feb 5, 2020 07:54 PM	C25	C25	C25 C25				

- When CRM receives an sms from a number, it will be linked to corresponding Lead and Contact by search and find in the modules.
- If no leads or contact is found for the source number, a new lead will be generated and the incoming sms will be saved under that lead.
- In case of duplicate Contacts and Leads, the incoming sms will be saved for the first created item.



CREATED TIME	FIRST NAME	LAST NAME	CONTACT NAME	MOBILE	EMAIL
Feb 6, 2020 09:52 AM	C28-First	C28-Second	C28-First C28-Second		
Feb 5, 2020 08:14 PM	C27-First	C27-Last	C27-First C27-Last		
Feb 5, 2020 08:12 PM	C26-First	C26-Last	C26-First C26-Last		
Feb 5, 2020 07:54 PM	C25	C25	C25 C25		
Feb 5, 2020 11:03 AM		C24	C24		
Feb 5, 2020 11:03 AM		C23	C23		

SalesSignals (38) Feeds

- + @ 43965
Null
Incoming SMS from 4435(2:41 PM)
- C C25 C25
Incoming SMS 12:40 PM
- S sruthy9 sruthy9
Incoming SMS 12:40 PM

- Also, the SMS details are saved in the **"SMS Activity"** module.

	CREATED TIME	SMS ACTIVITY NAME	SOURCE	DESTINATION	DIRECTION	STATUS	MESSAGE	LEAD
<input type="checkbox"/>	Feb 11, 2020 12:41 PM	Incoming SMS	[REDACTED]	3965 SMSinfo	Incoming	N/A	Test content	+919645443965
<input type="checkbox"/>	Feb 11, 2020 12:40 PM	Incoming [Contacts] SMS from C25 C25	[REDACTED]	965 SMSinfo	Incoming	N/A	Test content	
<input type="checkbox"/>	Feb 11, 2020 12:40 PM	Incoming [Leads] SMS from sruthy9 sruthy9	[REDACTED]	965 SMSinfo	Incoming	N/A	Test content	sruthy9 sruthy9

Workflow Webhook (Automation)

- You can create a workflow and add a webhook to send SMS from ZohoCRM Automation.
- The detailed documentation can be accessed from [here](#)

Workflow Custom Function (Automation)

- Also, you can create a workflow and add a custom function to send SMS from ZohoCRM Automation.
- The detailed documentation can be accessed from [here](#)

Support

- For all the support requests and general queries you can contact zoho@d7networks.com or visit [contact-us](#)
- Also, you can avail the live chat available our website d7networks.com or you can text with us via WhatsApp at +971566816452