



D7SMS Extension for ZohoCRM

Overview

D7 SMS integration with Zoho CRM creates an efficient communication channel between Zoho CRM and your customers. This integration helps to easily reach your customers via SMS from within your Zoho CRM account. SMS is the most effective form of communication, with a 98% open and read rate. Direct7 Networks provides highly reliable and cost-effective communication solutions to businesses across all industries. D7 is the result of dedication and continuous experimentation by a group of IT Engineers in the telecommunication service sector, specialising in providing worldwide SMS transmission using D7's own connectivity to global mobile network operators

Key Features:

- 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 template creation feature.
- SMS Scheduling without time barrier or any limit.
- Receive detailed SMS alerts to agent's contact numbers when a new Lead, Contact or Deal is created.
- SMS Opt-out option for each Lead & Contact which is also then mapped with Deal module.
- An integrated detailed report of all SMS activity within the ZohoCRM itself.

Video Tutorial:

Click on the following link for detailed instructions and tutorial

<https://youtu.be/Nu38svOedhc>

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 Authuser and Authpass with API Details received.
4. Update Agent Contacts
 - 4.1. If you want to receive new entry alerts configure it here separated by a comma. Else leave it as “NA”

← Extension Details

Name	D7-SMS for Zoho CRM
Version	143.0
Installed by	d7web@d7networks.com
Short description	Kindly contact zoho@d7networks.com or signup at https://d7networks.com/signup for API details. Also you can get 10 Free SMS Credits for testing the extension.
Status	Active
Permission	Change Permission

Extension Settings

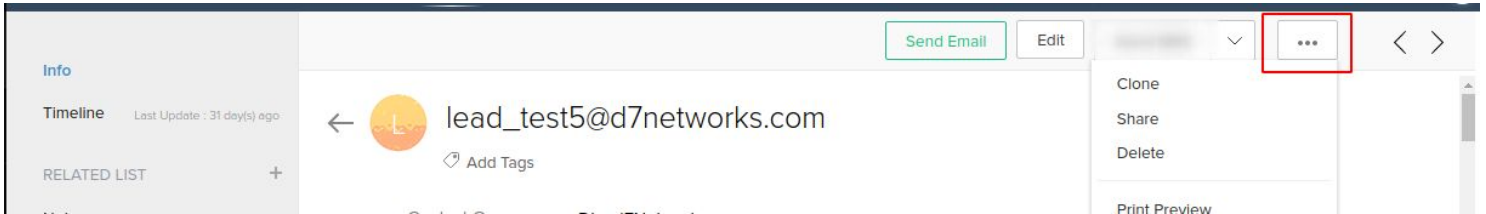
Authuser	
Authpass	
Msg From	SMSInfo
New Contact Alert	+971562316353,+971562316354
New Lead Alert	+971562316353,+971562316354
New Deal Alert	+971562316353,+971562316354

Send SMS:

- Navigate to a Single entry of Contacts, Leads or Deals
- Send SMS option will be available on the top

The screenshot shows the Zoho CRM interface. At the top, there is a navigation bar with tabs for Home, Leads, BD Leads, WebLeads, **Contacts**, Accounts, Activities, and Reports. On the right side of the navigation bar, there are icons for search, add, chat, email, calendar, notifications, settings, and profile. Below the navigation bar, there is a toolbar with buttons for 'Send Email', 'Edit', 'Send SMS' (highlighted with a red box), and a dropdown menu. The main content area shows a contact entry for 'lead_test5@d7networks.com' with a profile picture and an 'Add Tags' button. On the left side, there is a sidebar with 'Info', 'Timeline' (Last Update: 31 day(s) ago), and 'RELATED LIST'.

- 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 “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:

A screenshot of a 'Send SMS' popup window. The window has a title bar with 'Send SMS' and a close button. The main content area includes:

- Template:** A dropdown menu with 'Select Template' and a downward arrow. Below it is a link 'Add New Template'.
- Insert Fields:** A dropdown menu with 'First_Name' and a downward arrow.
- Message:** A text area containing the message: 'Dear [First_Name], Thank you for contacting D7SMS.' There is a small icon in the bottom right corner of the text area.
- Save message as a template:** A checked checkbox.
- Template Name:** A text input field containing 'Template1' and a blue 'save' button.
- Schedule Message:** An unchecked checkbox.

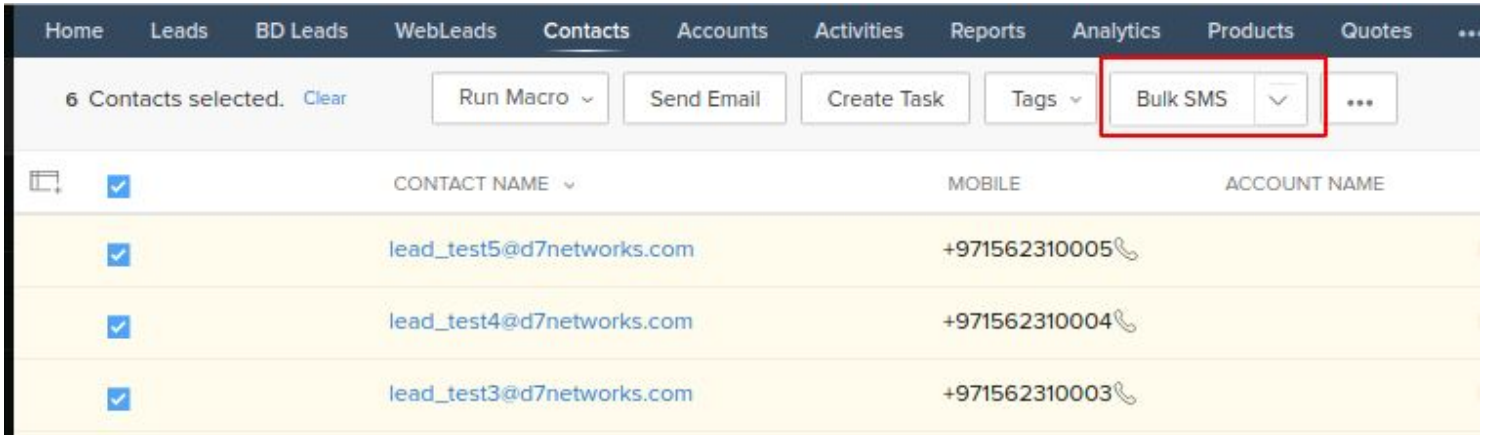
- Select Template: Choose an already created template (if created any)
 - Add new template: Navigate to templates module and add a new template
 - Insert Fields: Insert Dynamic fields to Message content. Available dynamic fields are listed here.
 - Add Message content: This will be the SMS Body
 - Save 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 “SMS Sent” module link

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

- Template:** A dropdown menu with 'Select Template' and a downward arrow. Below it is a link for 'Add New Template'.
- Insert Fields:** A dropdown menu with 'First_Name' and a downward arrow.
- Message:** A text area containing the message: 'Dear [First_Name], Thank you for contacting D7SMS.' A red box highlights a green status message: 'Messages Processed Successfully. More details are available in the [SMS Sent](#) Module'.
- Save message as a template:** A checked checkbox.
- Template Name:** A text input field containing 'Template1' and a blue 'save' button.
- Schedule Message:** An unchecked checkbox.

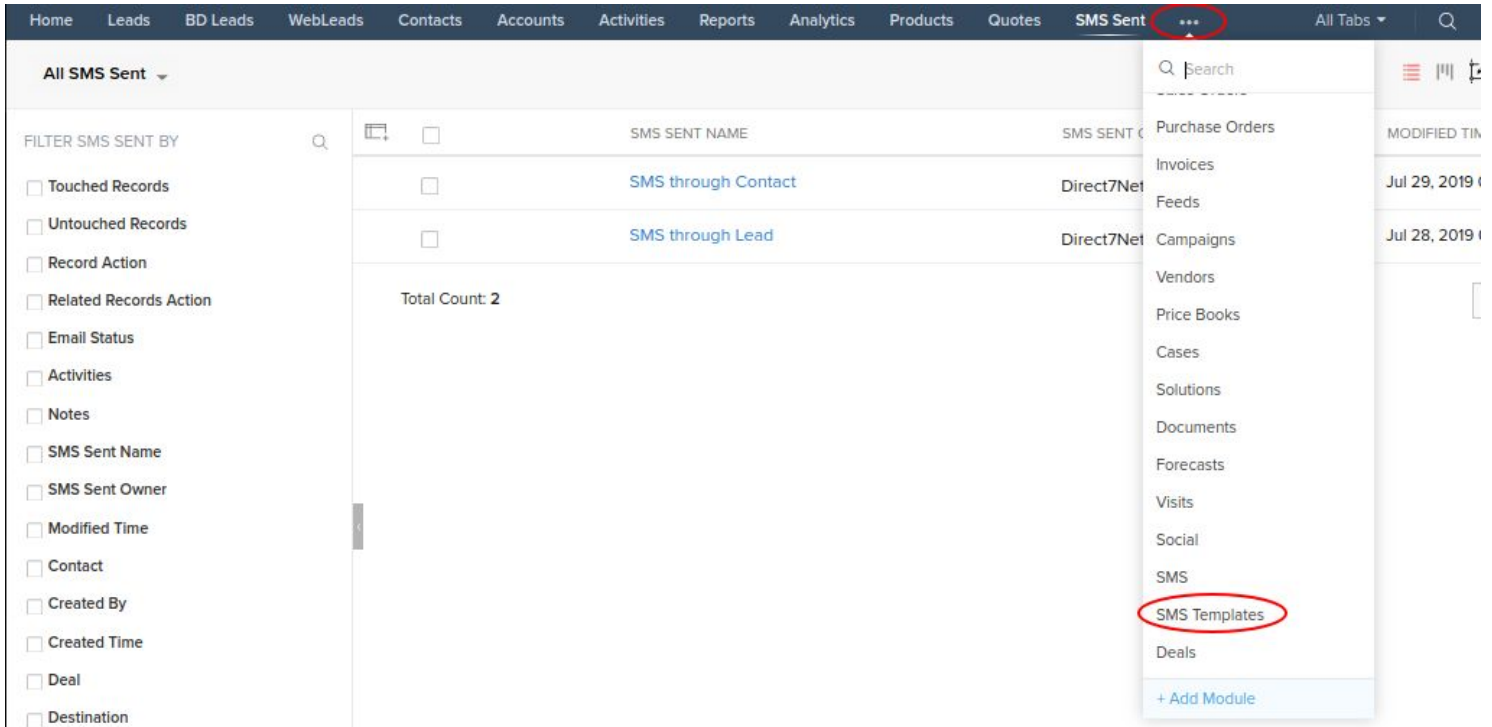
Bulk SMS:

- 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 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 be also saved from Send SMS and Bulk SMS Window.

All SMS Templates

Import

FILTER SMS TEMPLATES BY

- Touched Records
- Untouched Records
- Record Action

NAME	TEMPLATE	SMS TEMPLATE OWNER	CREATED BY	MODIFIED BY
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

Add fields to message

Message

Dear, [First_Name],
Thank you for contacting D7SMS.

Save message as a template

Schedule Message

Choose date and time for Scheduling:

19/07/30 21:04

Current UTC time : 2019/07/29 3:34:10 pm

* 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 “Schedule Message” checkbox on 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

The screenshot shows the Direct7 web interface. The left sidebar contains a navigation menu with 'Campaign Statistics' highlighted in red. The main content area displays 'Campaign Statistics' with a search bar and a table of scheduled messages. Two 'Scheduled' status buttons in the table are also highlighted in red.

URL: <https://smsc.d7networks.com/catalog/campaign-report/>

Direct7

Dashboard

FEATURES

- Campaign
- Campaign Statistics**
- Contact Book
- Reports

ACCOUNTS

- Coverage Details

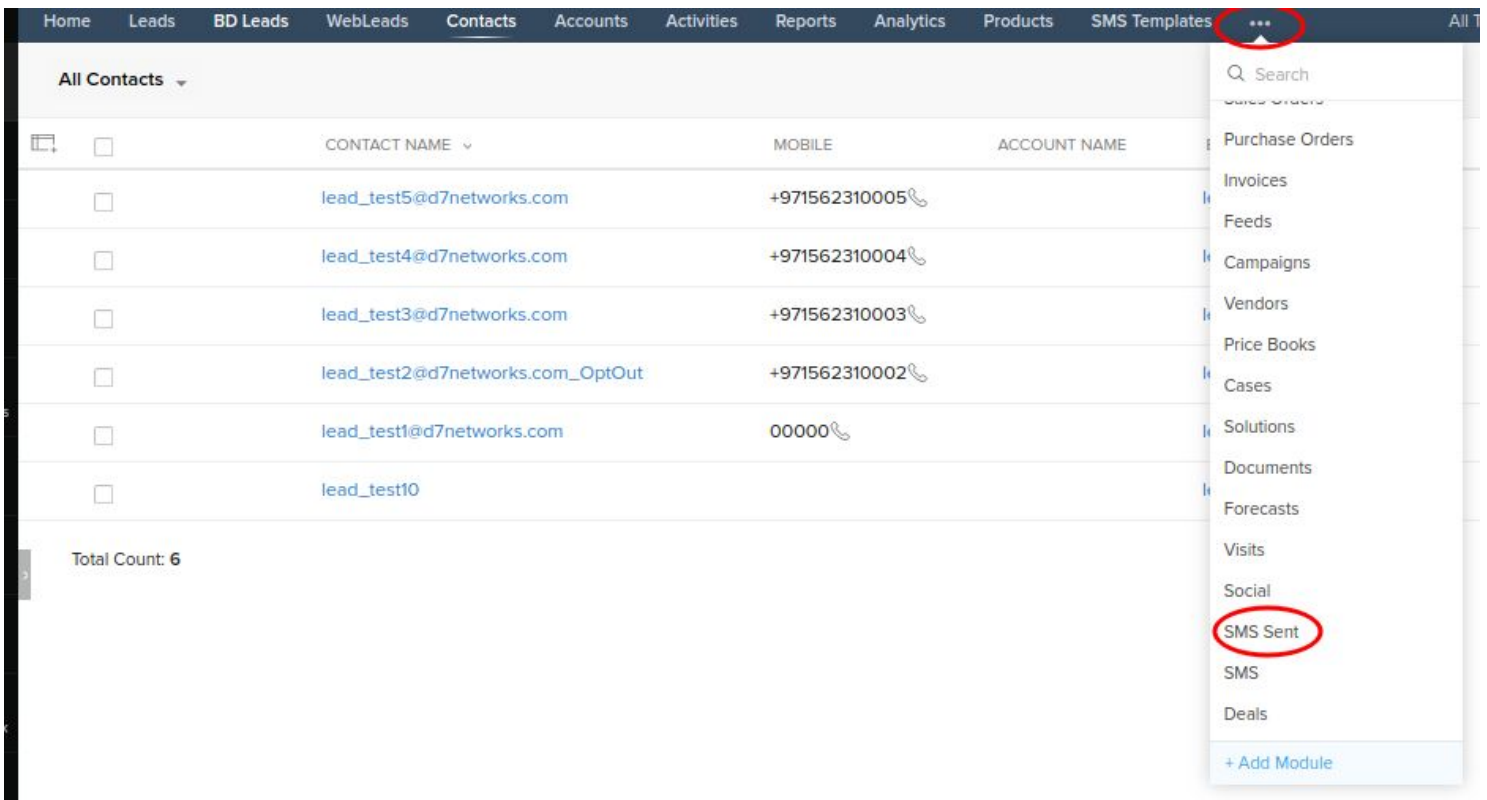
Campaign Statistics

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 Sent:

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



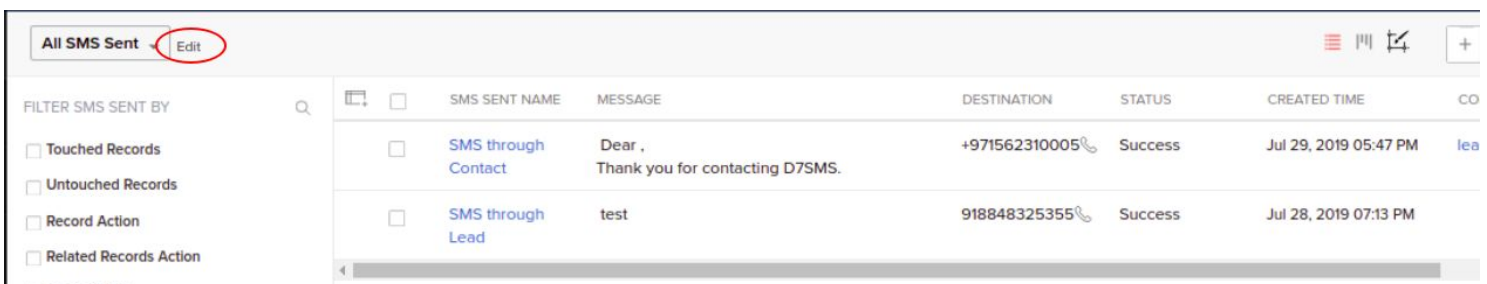
The screenshot shows the CRM interface with the 'Contacts' module selected. The 'All Contacts' list is displayed with columns for CONTACT NAME, MOBILE, and ACCOUNT NAME. A dropdown menu is open, showing various modules. The 'SMS Sent' option is highlighted with a red circle.

CONTACT NAME	MOBILE	ACCOUNT NAME
lead_test5@d7networks.com	+971562310005	
lead_test4@d7networks.com	+971562310004	
lead_test3@d7networks.com	+971562310003	
lead_test2@d7networks.com_OptOut	+971562310002	
lead_test1@d7networks.com	00000	
lead_test10		

Total Count: 6

Dropdown Menu Items: Search, Purchase Orders, Invoices, Feeds, Campaigns, Vendors, Price Books, Cases, Solutions, Documents, Forecasts, Visits, Social, **SMS Sent**, SMS, Deals, + Add Module

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



The screenshot shows the 'All SMS Sent' report view. The 'Edit' button is highlighted with a red circle. The report table displays columns for SMS SENT NAME, MESSAGE, DESTINATION, STATUS, and CREATED TIME.

SMS SENT NAME	MESSAGE	DESTINATION	STATUS	CREATED TIME
SMS through Contact	Dear , Thank you for contacting D7SMS.	+971562310005	Success	Jul 29, 2019 05:47 PM
SMS through Lead	test	918848325355	Success	Jul 28, 2019 07:13 PM

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

The screenshot shows the Zoho CRM interface for a contact named 'lead_test5@d7networks.com'. A red box highlights the 'SMS History01' table, which contains the following data:

SMS Sent Name	Destination	Message	Status	Created Time
SMS through Contacts	+971562310005	Dear , Thank you for contacting D7SMS.	Success	Jul 29, 2019 09:13 PM
SMS through Contact	+971562310005	Dear , Thank you for contacting D7SMS.	Success	Jul 29, 2019 05:47 PM

Agent Alerts:

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

The screenshot shows the 'Extension Settings' page in Zoho CRM. The 'Msg From' field is set to 'SMSInfo'. A red box highlights the alert configurations for new entries:

New Contact Alert	+971562316353,+971562316354
New Lead Alert	+971562316353,+971562316354
New Deal Alert	+971562316353,+971562316354

- 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:

- May be few of the customers does 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, 30 Jul 2019 09:51 PM

SMS Opt Out

Asst Phone --

Email Opt Out --

Skype ID **d7networks**

Secondary Email --

Twitter --

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