routemobile
communication simplified

Route Mobile WhatsApp Integration for Zoho CRM

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About

Route Mobile and Zoho CRM are integrated to make customer communication easier and faster. Route Mobile WhatsApp Integration for Zoho CRM has intelligent features so that the messages reach the end users and make them comfortable without losing communication

Pre-requisites for app installation

- Should have a Zoho CRM account
- Should have a Route Mobile account
- Should have Route Mobile number
- Should have approved templates to initiate the conversation.

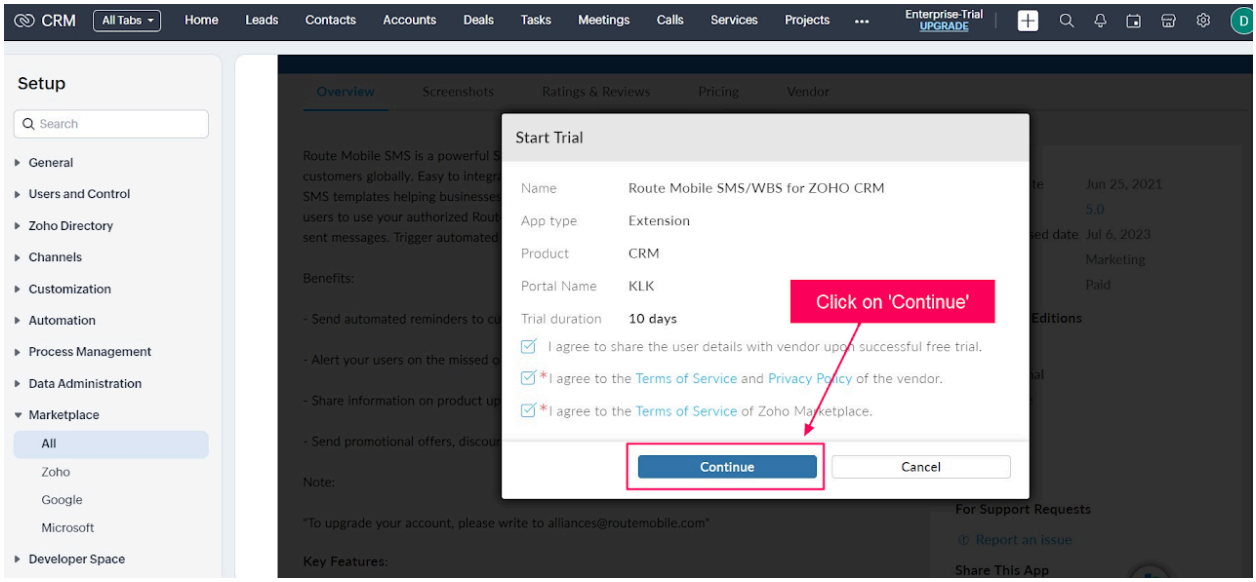
Features

- Send a single message to leads, contacts, deals, and accounts module
- Send Broadcast message to leads, contacts, deals, and accounts module
- Create and manage templates
- View the history of Route Mobile messages
- Send automated messages through workflows

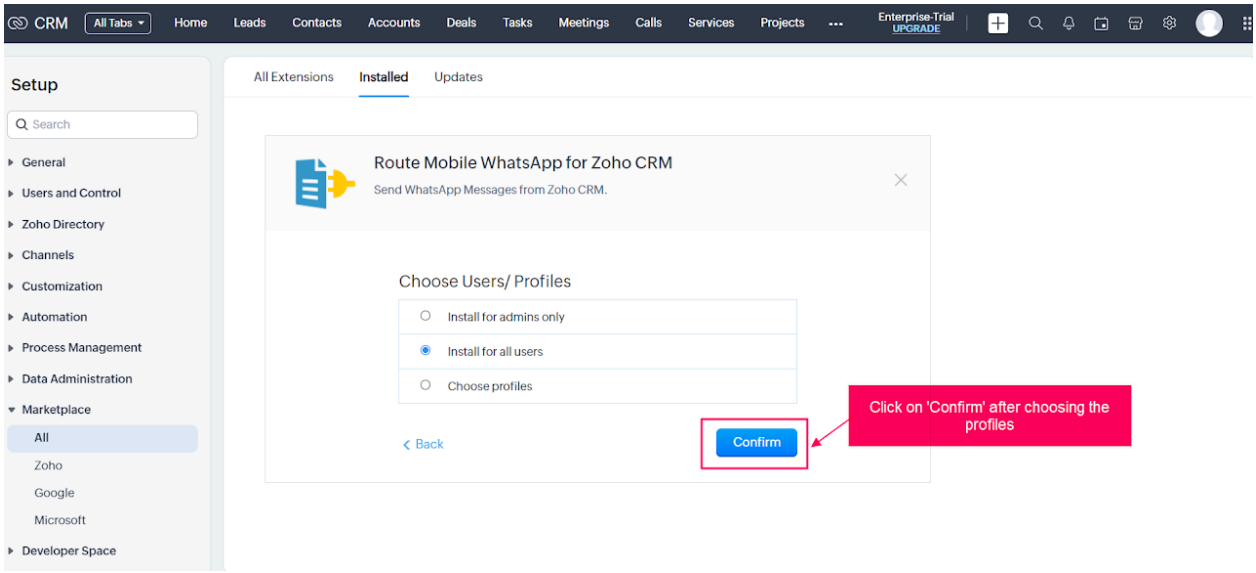
Application Installation

Step 1: Go to Zoho marketplace and install the extension following the below steps.

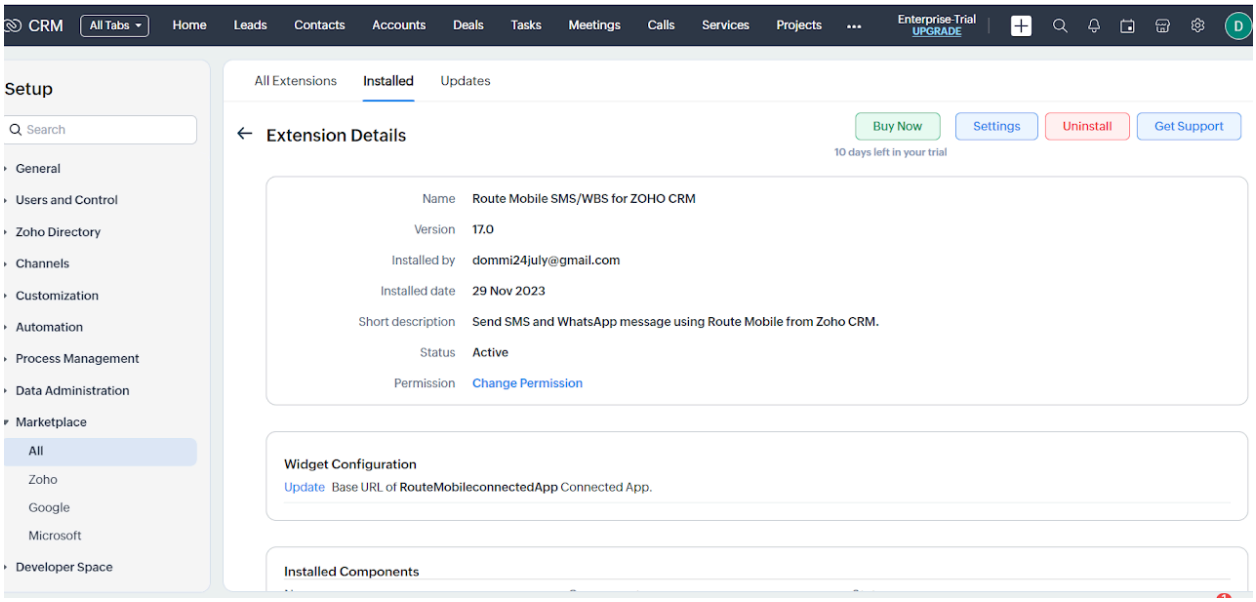
Step 2: Select the check box by agreeing to the terms and conditions and click **Continue.**



Step 3: Choose the profiles to whom you want to install the application in Zoho CRM and click **Continue.**

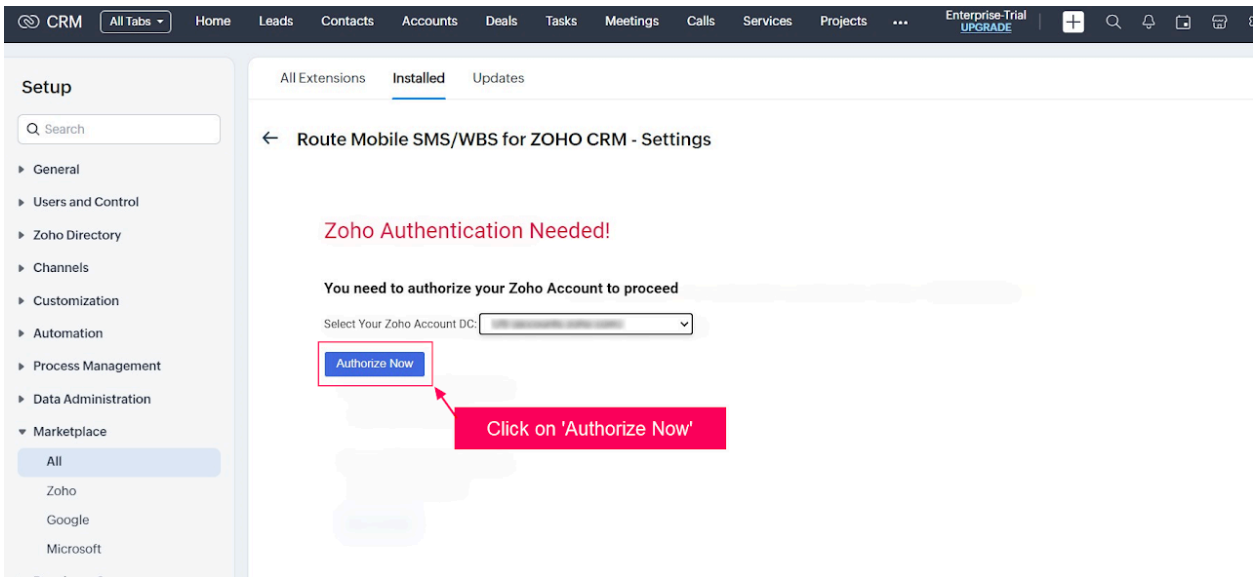


Step 4: Now your extension is successfully installed.



Authorization

Step 1: Initially you have to authorize your Zoho CRM. Click on **"Authorize Now"** option.



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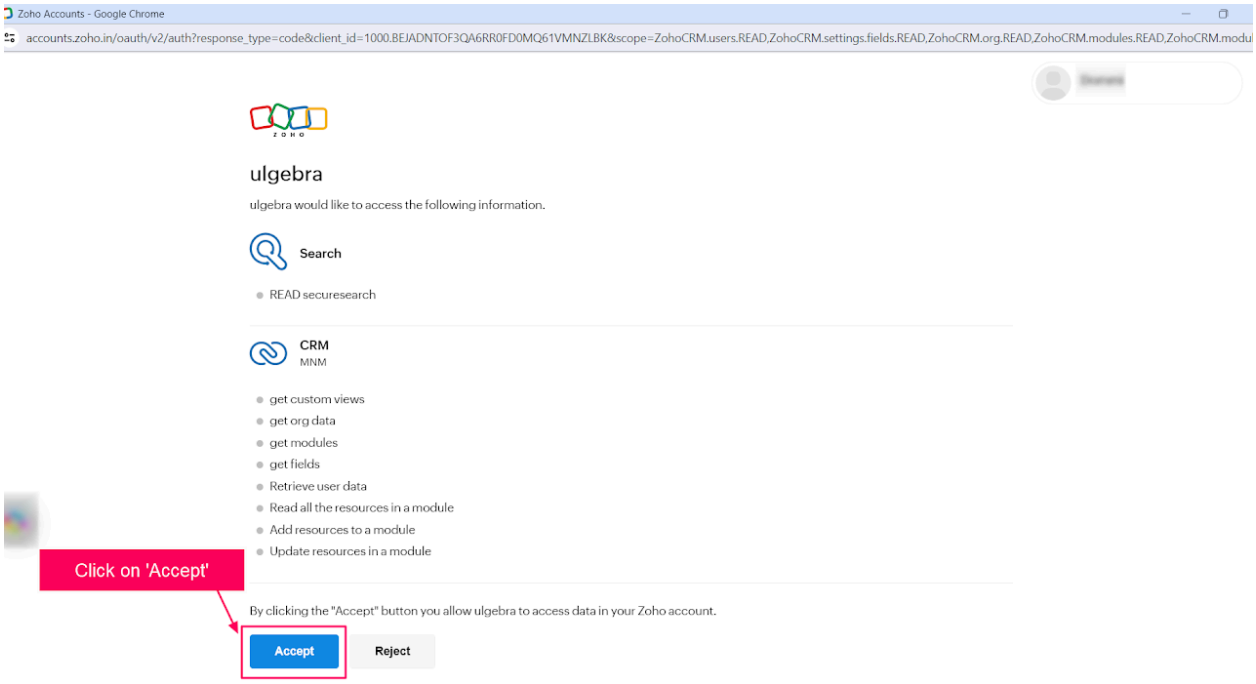
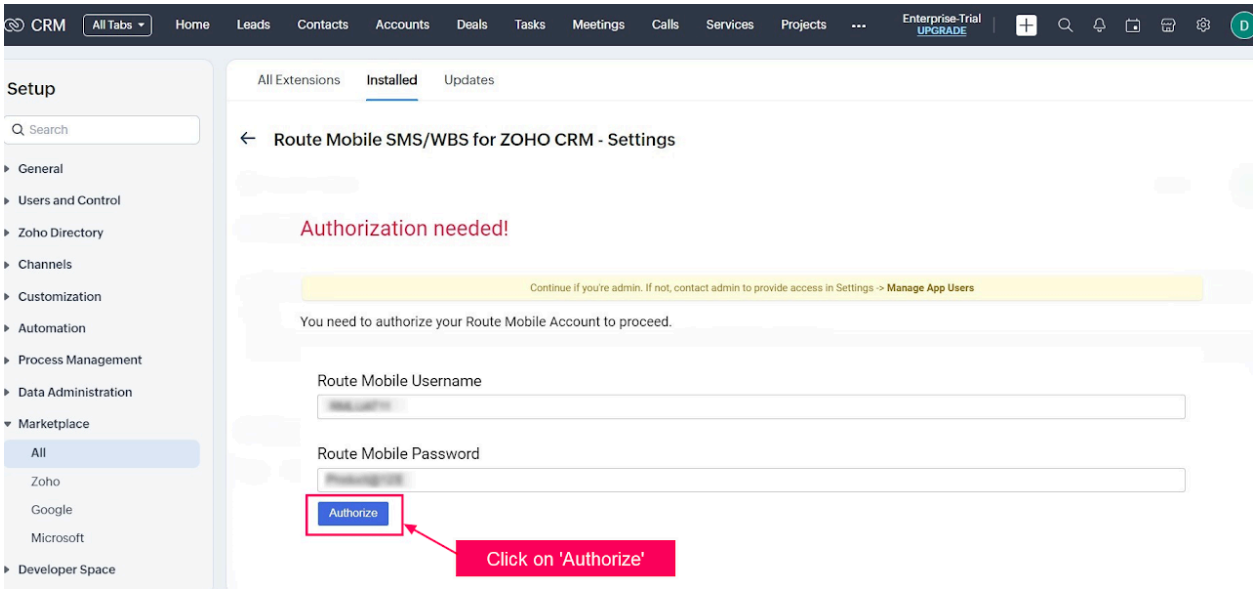
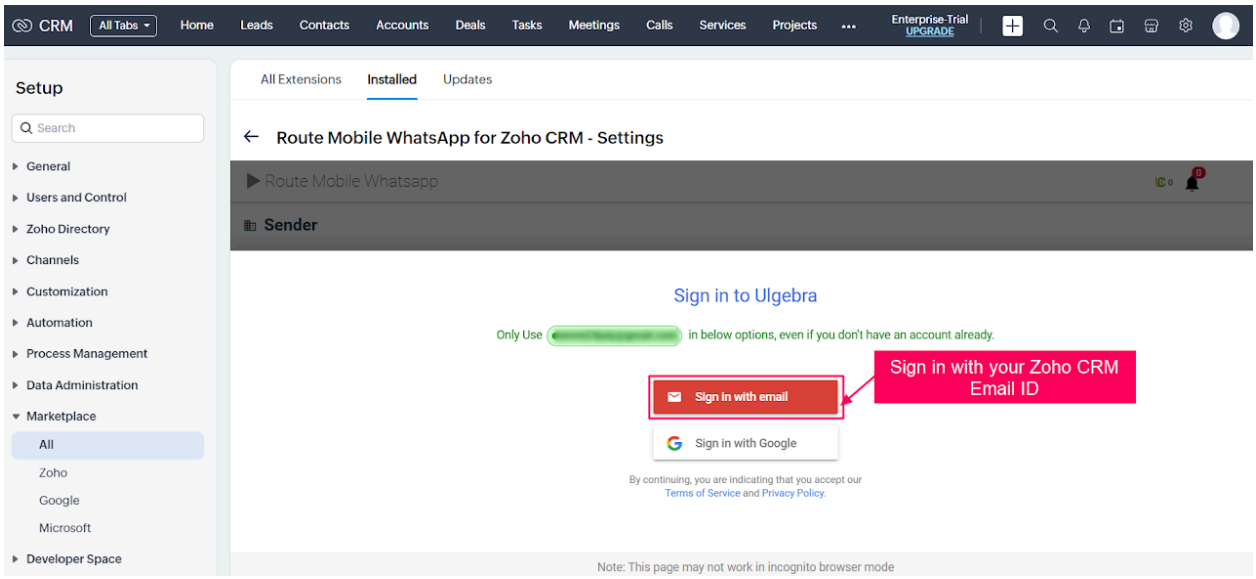


Step 2: Now you have to authorize your Route Mobile account by entering your Route Mobile credentials.



Step 3: Once your Zoho CRM and Route Mobile are successfully authorized, you have to log in to proceed further. You can either use the **"Sign in with email"** option or else you can use the **"Sign in with Google"** option.

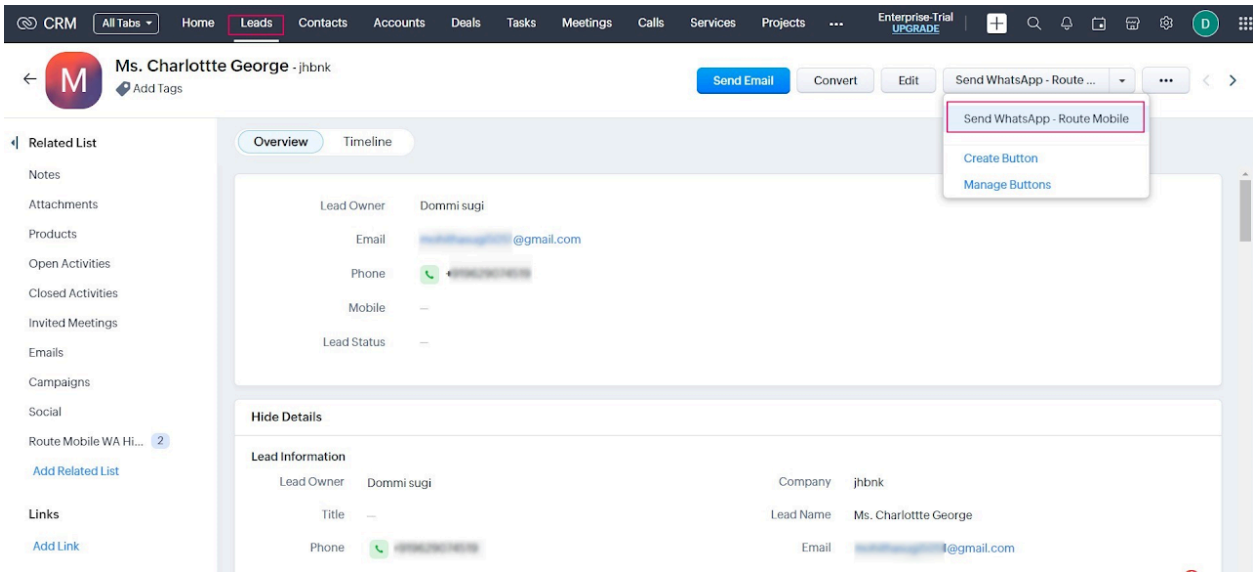
Note: The sign-in mail doesn't have to be your Route Mobile login mail. You can use your Zoho CRM mail for signing in.



Application Working

Sending Route Mobile Messages from Zoho CRM leads

Step 1: Go to the Leads module and open any of the Leads to whom you want to send the message. And then click the **"Send WhatsApp - Route Mobile"** option.



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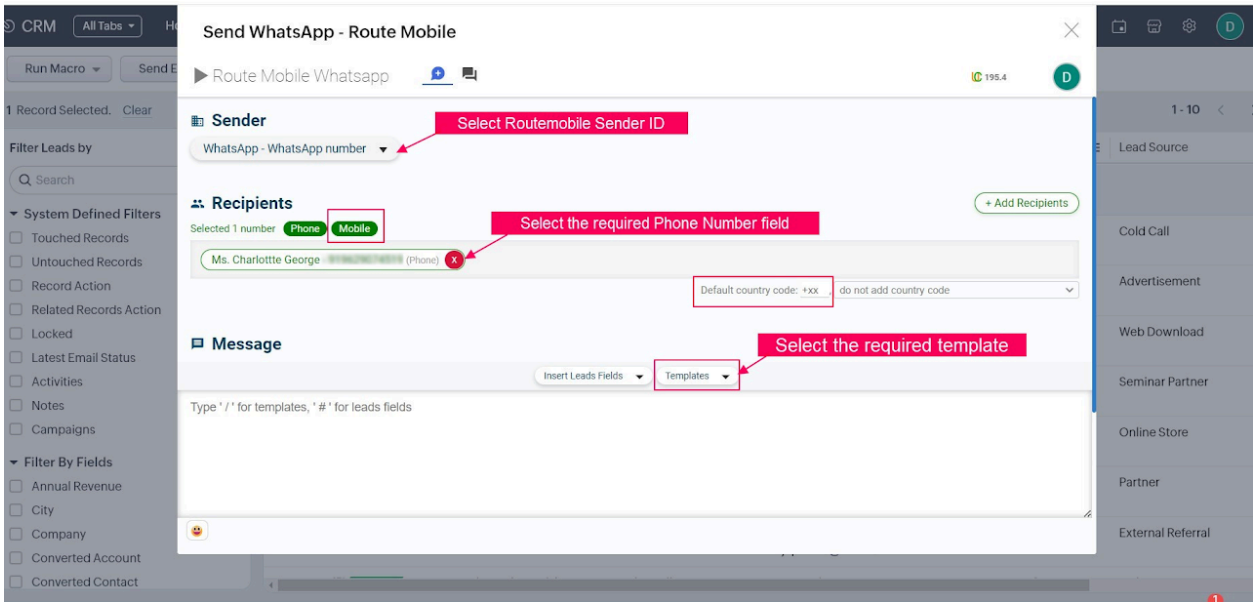
Step 2:

- Select your Route Mobile Sender ID.
- The values in your both phone field and mobile field will be automatically fetched in the Pop-up. You can select the option to which number you wish to send messages by clicking on the respective phone number field.
- Enter your default country code value. Which will be used for sending messages to numbers that don't have any country code in them.
- In the case of sending a message you can either type your own customized messages or else you can select the template for sending.
- For initiating WhatsApp conversations you are only allowed to send Route Mobile-approved Templates to your customers.
- After entering the Message click "Send".



Step 3:

i)Configure your Mobile number field, to which phone number field you wish to send messages.

ii)Configure your default country code option. You have multiple options for configuring the country code.

- Do not add Country code - If you have a country code for all your existing records in your CRM, you can select the ignore option.
- Add for all phone numbers - If all your existing records in your CRM doesn't have any country code you can select this option which will country code for all your numbers.

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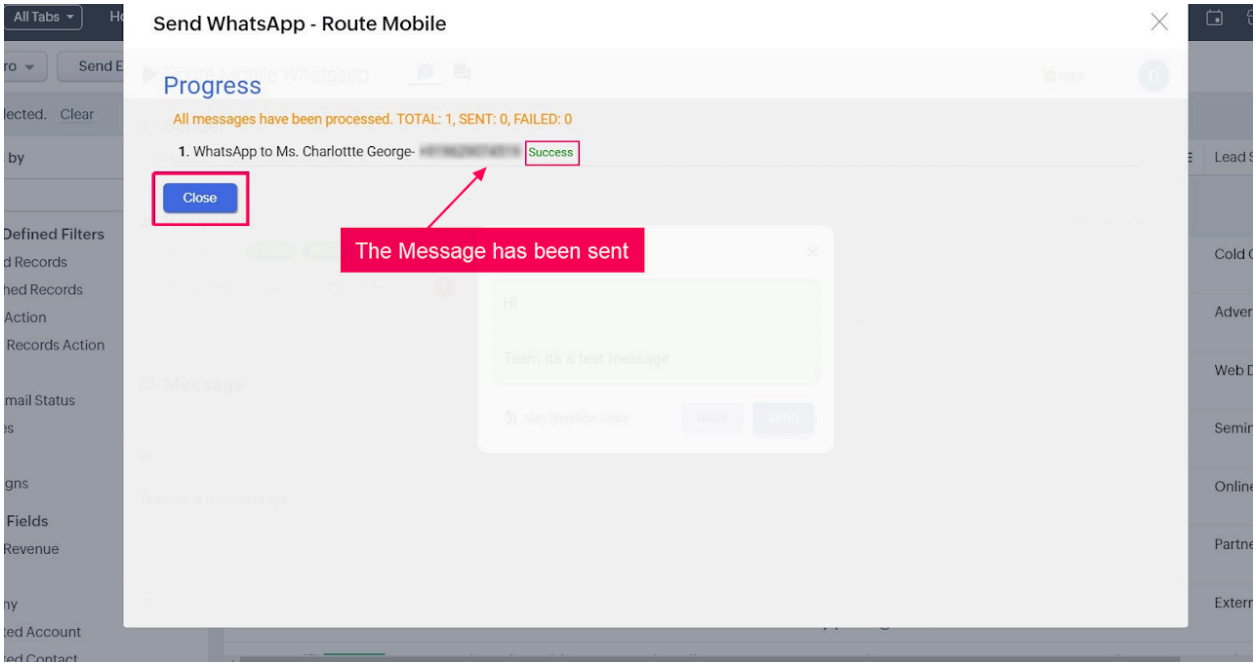
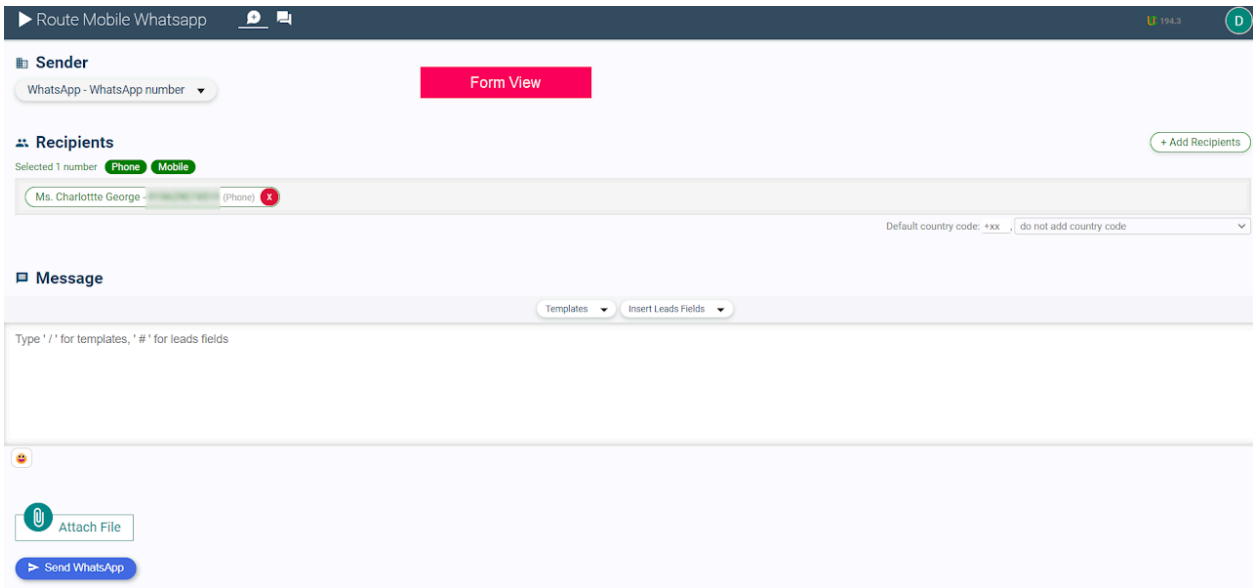
- Add if phone number starts with 0 - In case you have phone numbers in your existing records was saved with 0 (usually applies for abroad numbers) you can select this option.
- Add if phone number does not start with country code - In case some of your records in CRM doesn't have any country code in it you can select this option which will add country code only for the numbers which doesn't have a country code in it and ignore the ones which already have country code in it.

iii)Enter your Message and then click "Send SMS".

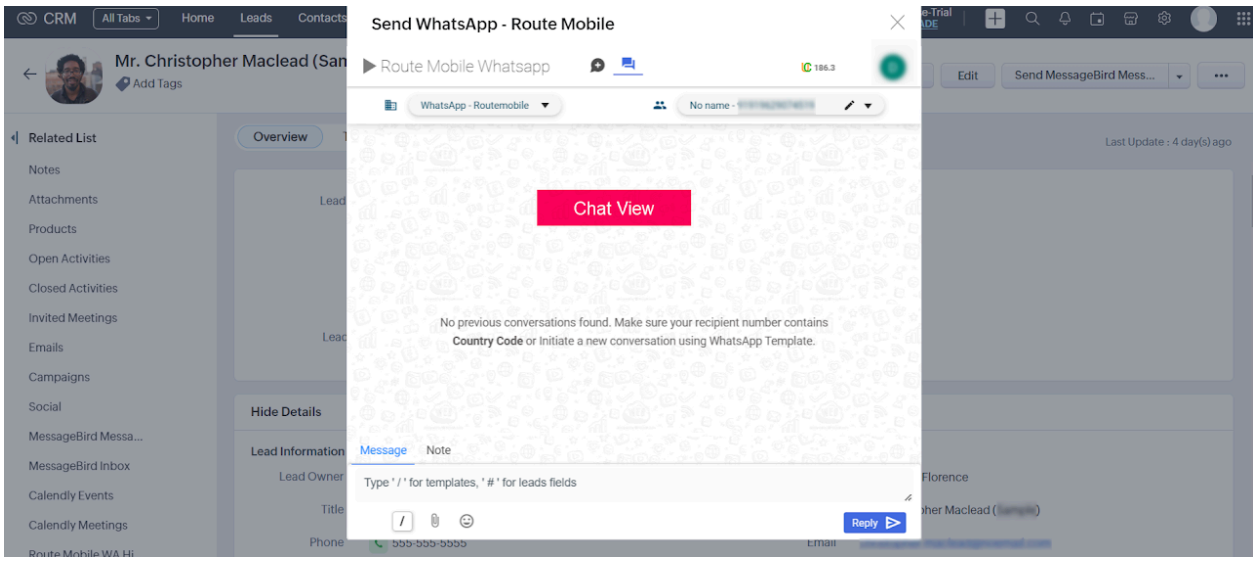
Step 4: You will be notified once your Message is successfully sent to your customers.



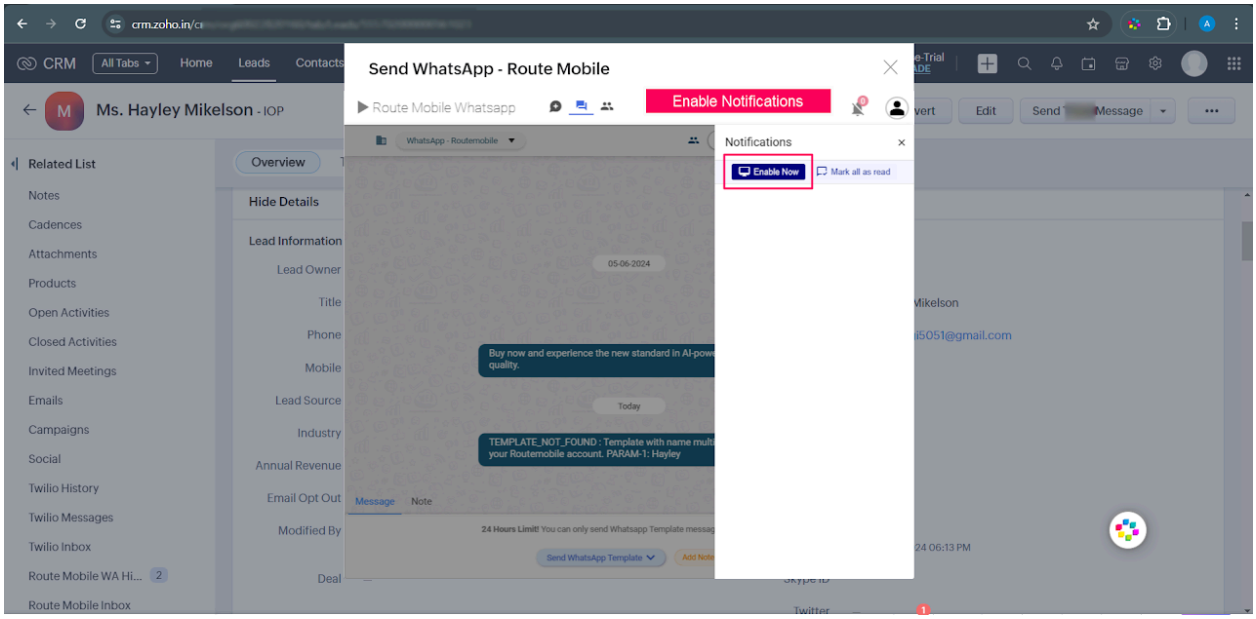
Form View of Route Mobile WhatsApp for Zoho CRM



Chat View of Route Mobile WhatsApp for Zoho CRM



Inbox View of Route Mobile WhatsApp for Zoho CRM



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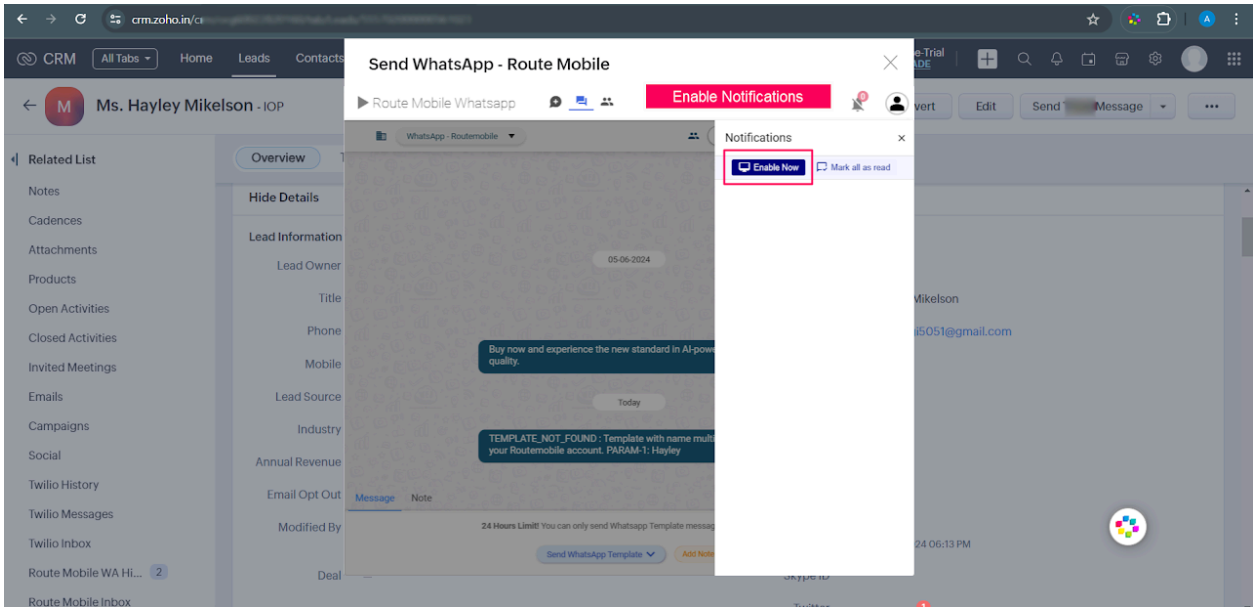
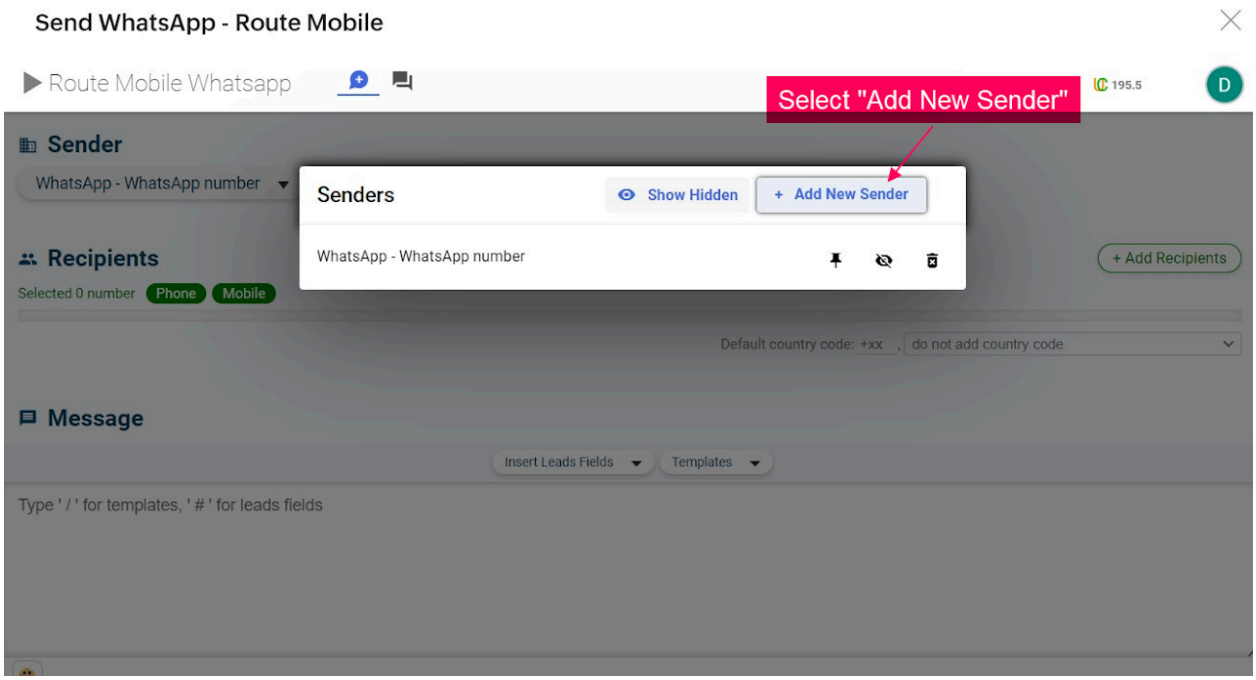
Enable Desktop Notifications

You can Select 'Enable Now' to receive the desktop notifications for every incoming message.



Add additional senders

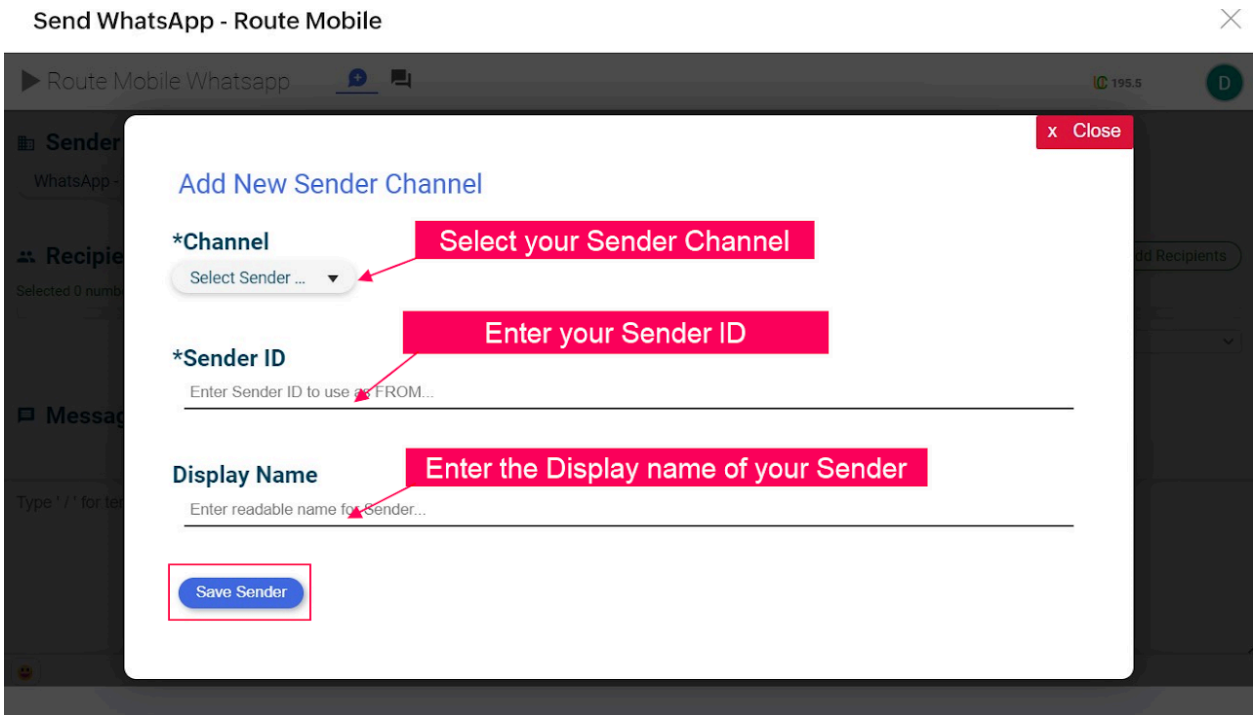
Step 1: Go to any of the Zoho CRM leads/contacts --> Click the **"Send Route Mobile - WhatsApp Message"** option from the top-right drop-down. Select the **"Choose sender"** option and then select **"Add New Sender".**



Step 2:

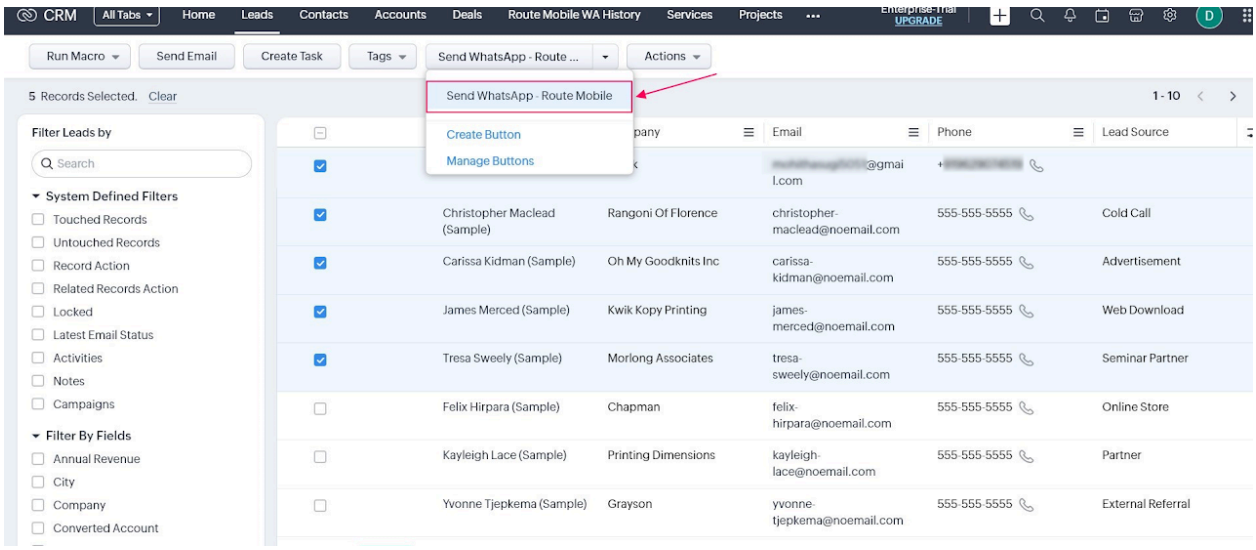
- Select your Sender channel.
- Enter your Sender ID at the provided space.
- Enter the display name of your Sender ID.
- After entering all the details click the **"Save Sender"**

Now you can able to view the additional sender you have added. You can able to send messages to your customers using both sender ID.



Send Broadcast Route Mobile Messages from Zoho CRM

Step 1: To send Broadcast messages go to the Leads list view and select one or more leads to whom you want to send bulk SMS messages. After selecting the leads click the **"Send Route Mobile - WhatsApp"** option.



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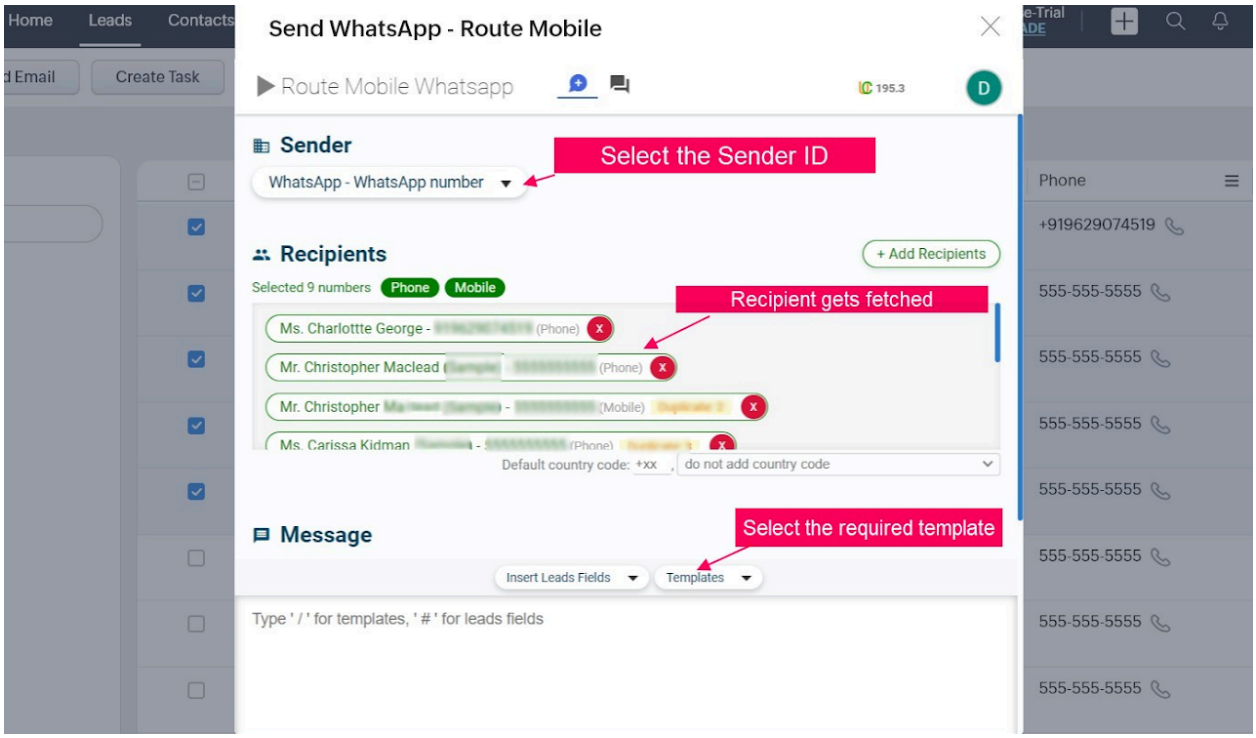
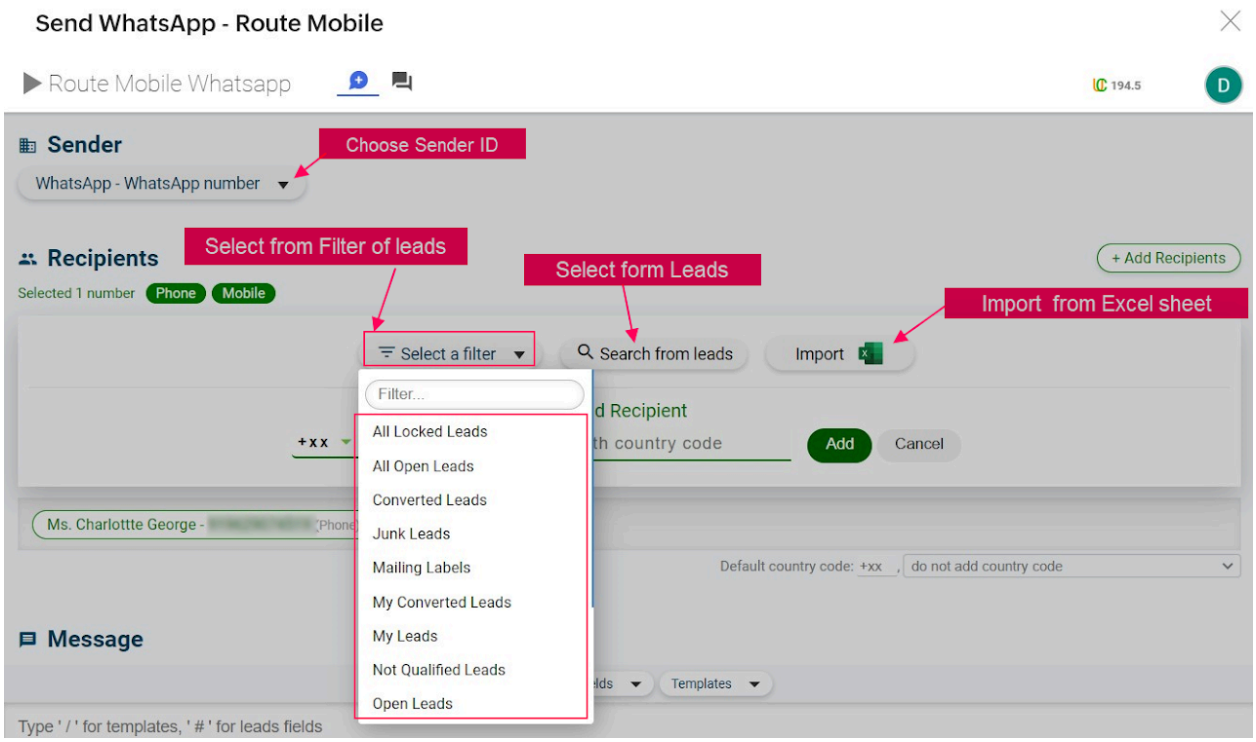
Step 2: Select the Sender ID, the recipients will get fetched automatically in order to send the Broadcast messages. Choose the required template and click 'Send'.



Send Route Mobile Messages to a specified Filter of leads

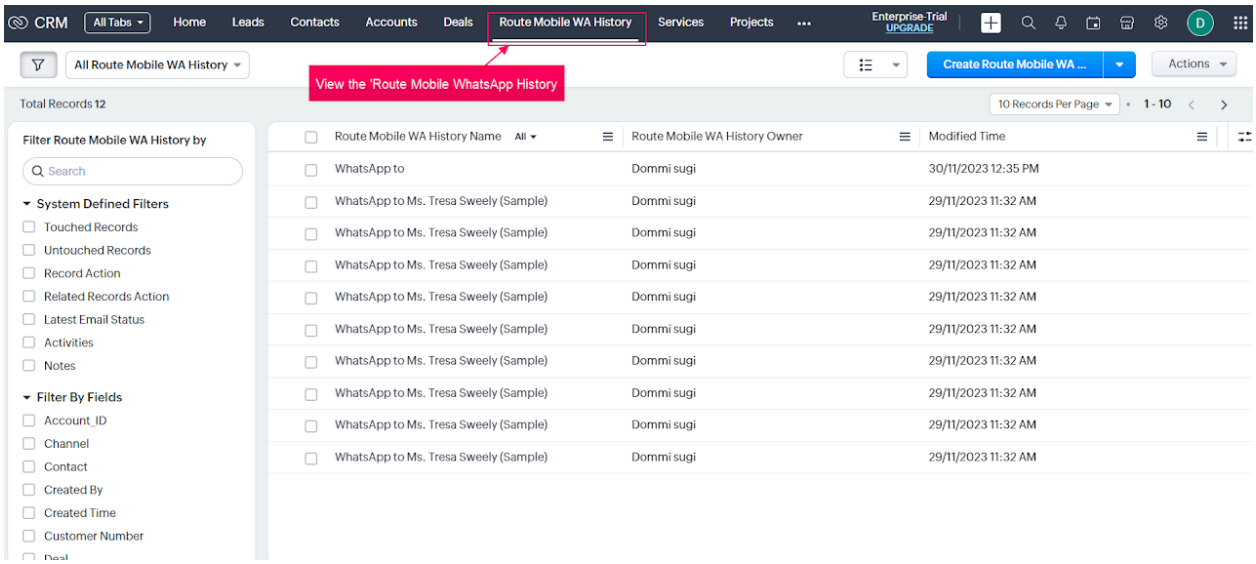
Step 1:

- Open any of your Leads and click on the "Send Route Mobile - WhatsApp" option.
- Select your Sender ID.
- Click on the "Add recipients" and select the filter of leads to whom you want to send the messages by selecting the drop-down.
- You can add the numbers by searching them from the leads using the "Search from Leads" option or else you can manually add the number.
- You can add the recipient from the Excel sheet.



History of Messages

Under the **Route Mobile WhatsApp History Messages** option inside your Lead you can able to view the History of messages you have sent and received to that particular lead.



Under the **Route Mobile WhatsApp History**, option inside your Lead you can able to view the History of messages you have sent and received to that particular lead.

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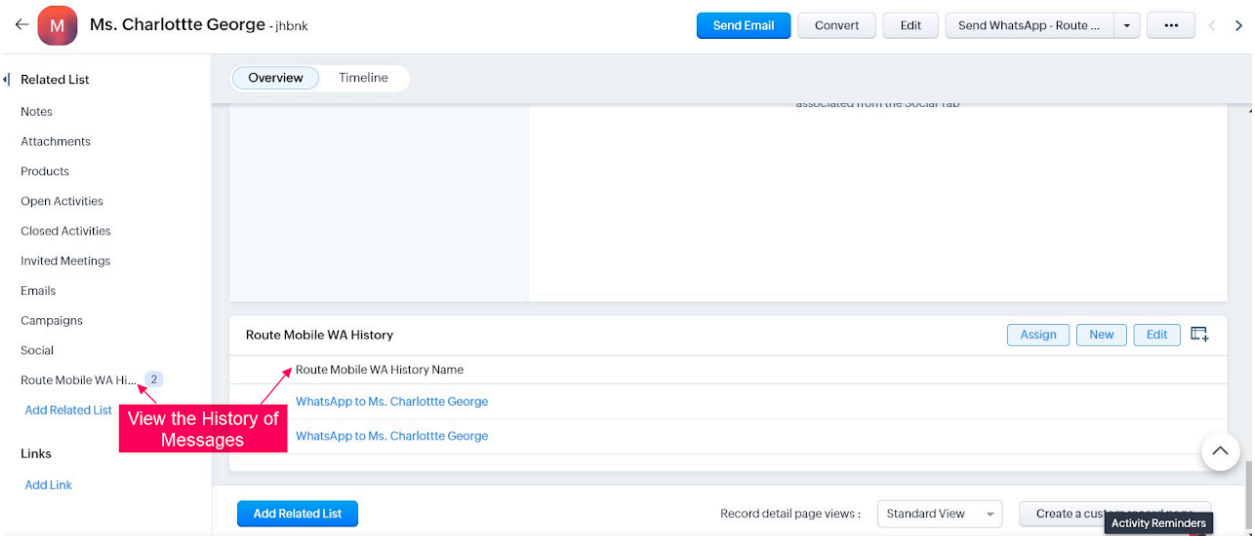
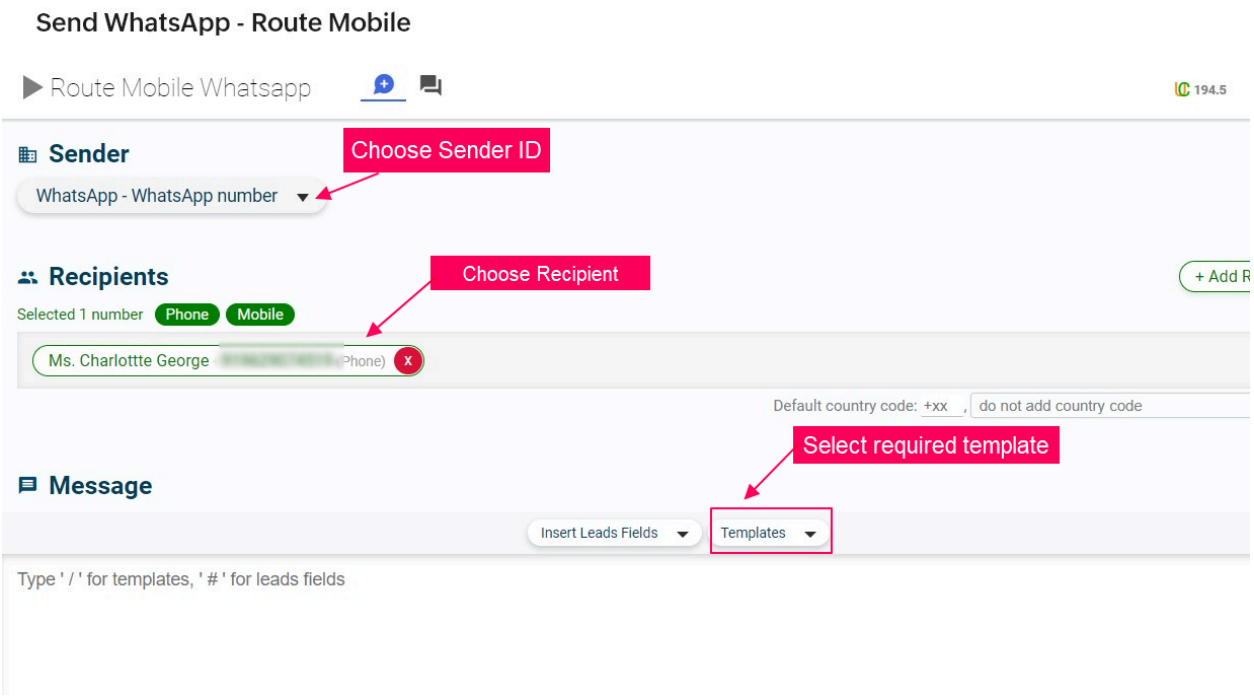


Notify customers with Route Mobile messages using workflows

Step 1: Go to any of the Zoho CRM leads/contacts --> Click the **"Send Route Mobile - WhatsApp"** option from the top-right drop-down --> Click the profile picture --> Click "Workflows". Copy the webhook URL. Copy parameters from the desired section.



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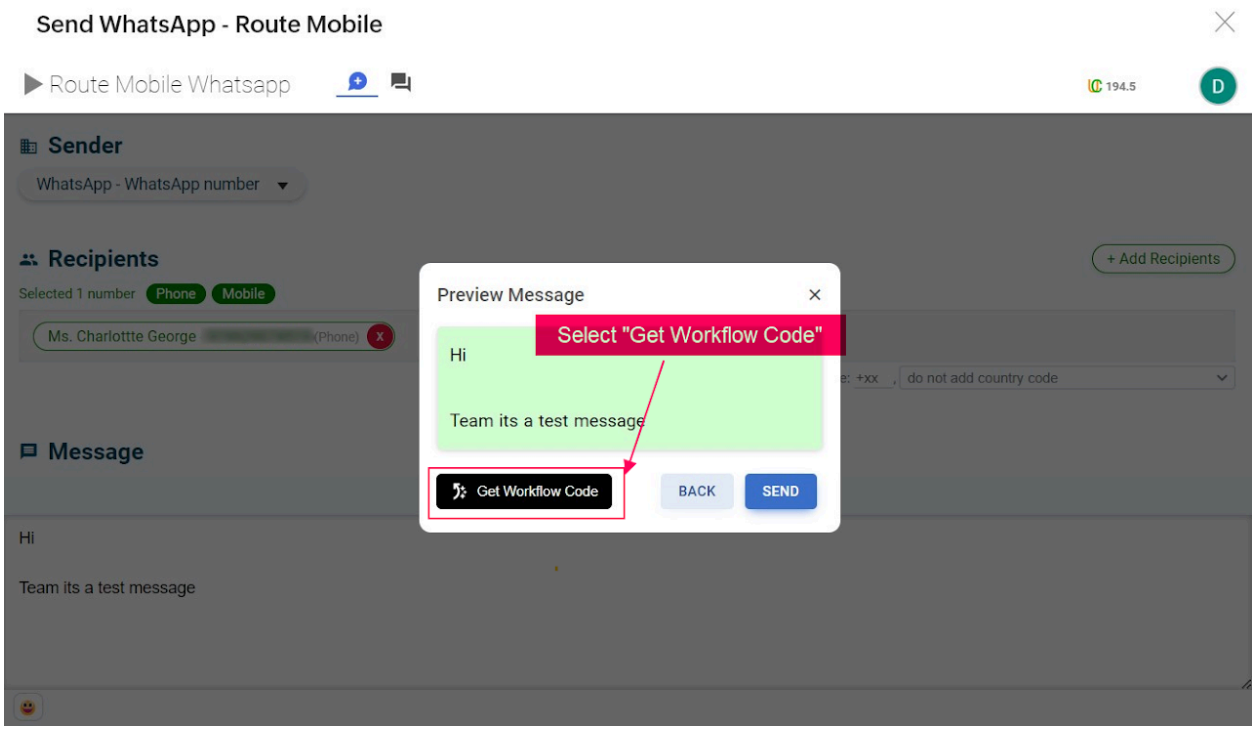

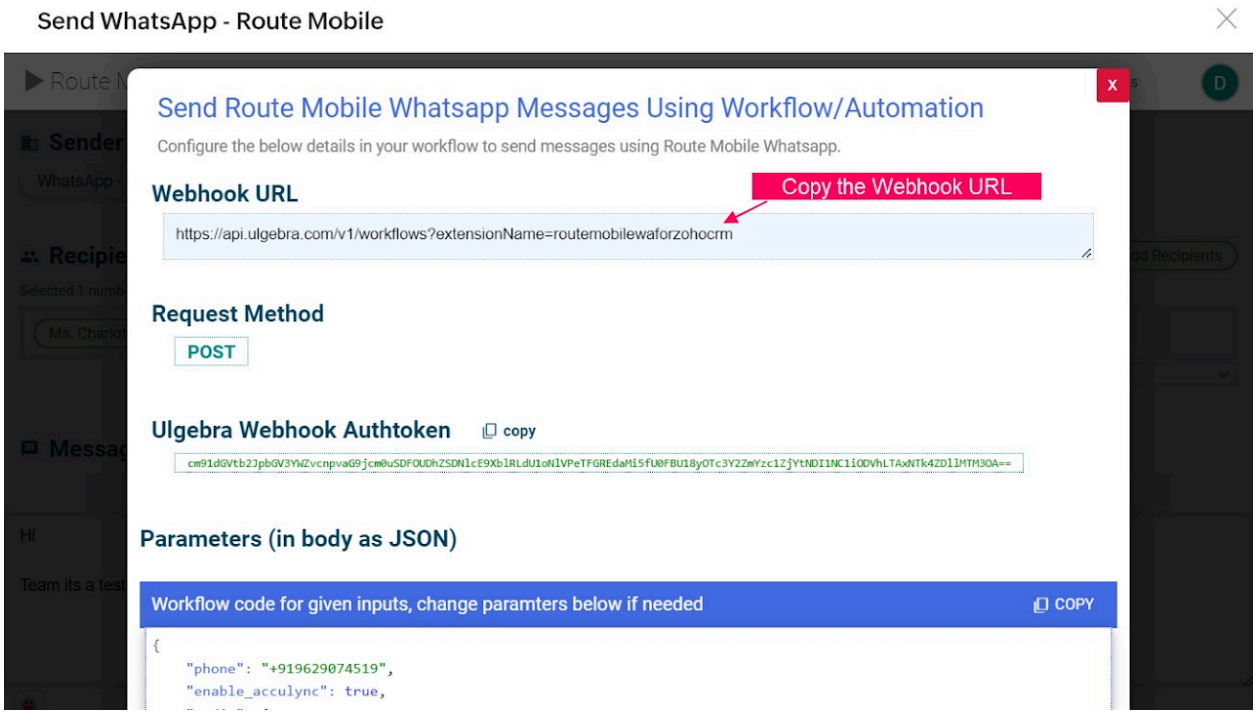

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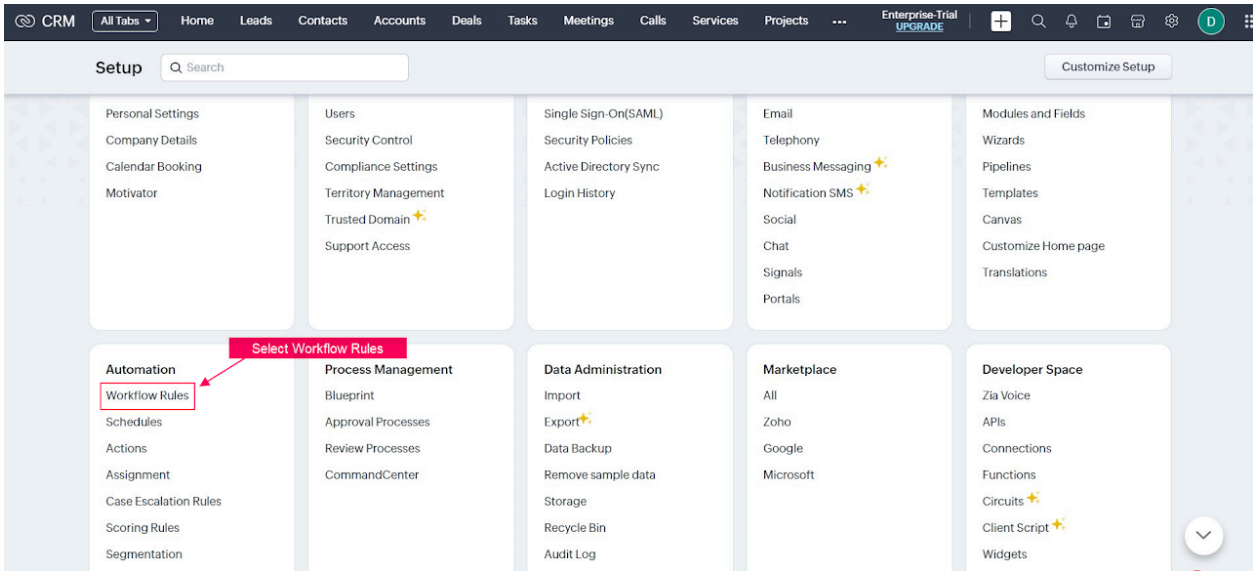
Step 2: Click Settings --> Automation --> Workflow rules --> Create rule. Enter the workflow name and module name for setting up the workflow for that particular module. Enter and fill in the necessary details required in the workflow and use webhook for invoking the workflow.



Step 3: Select 'Create Rule'.

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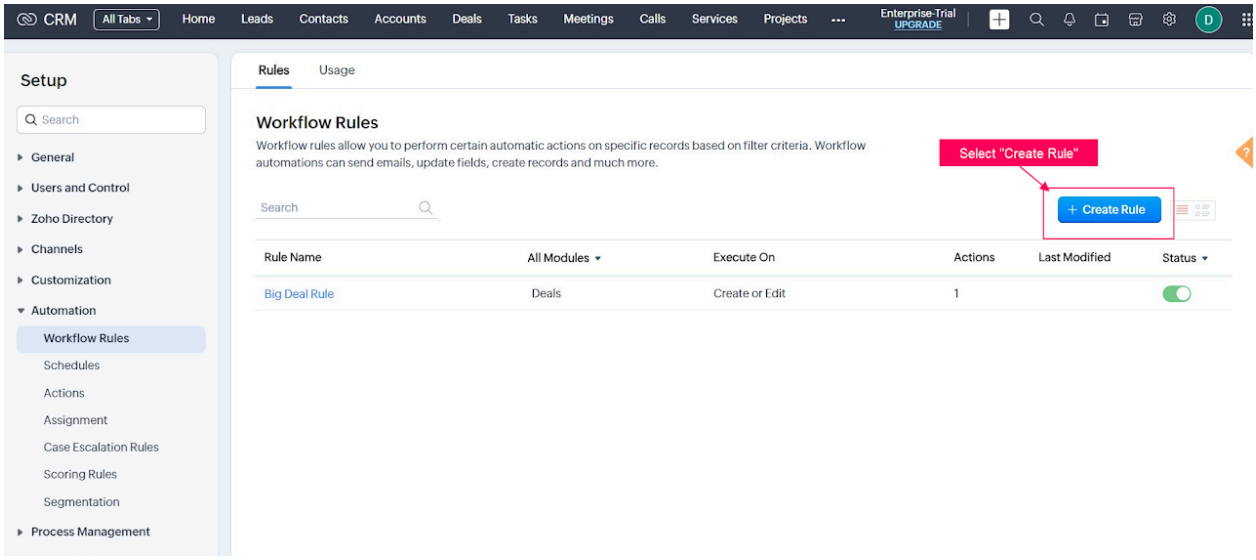
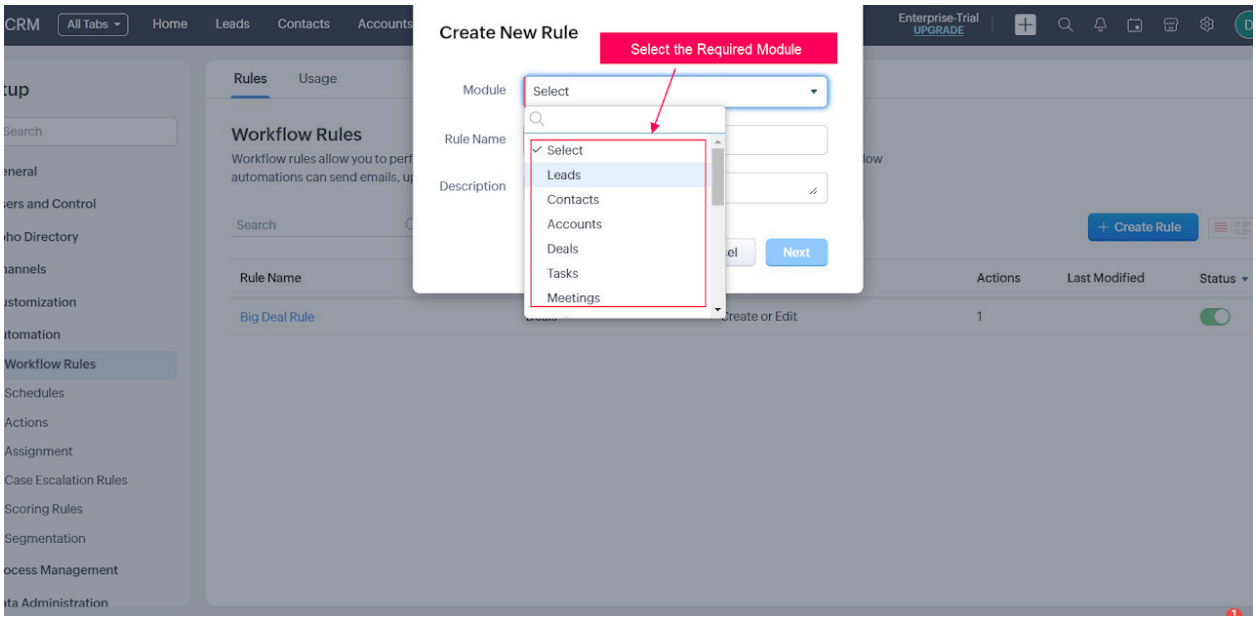


Step 4: Select the required module for the rule to be applied.



Step 5: Create the required condition for the Workflow

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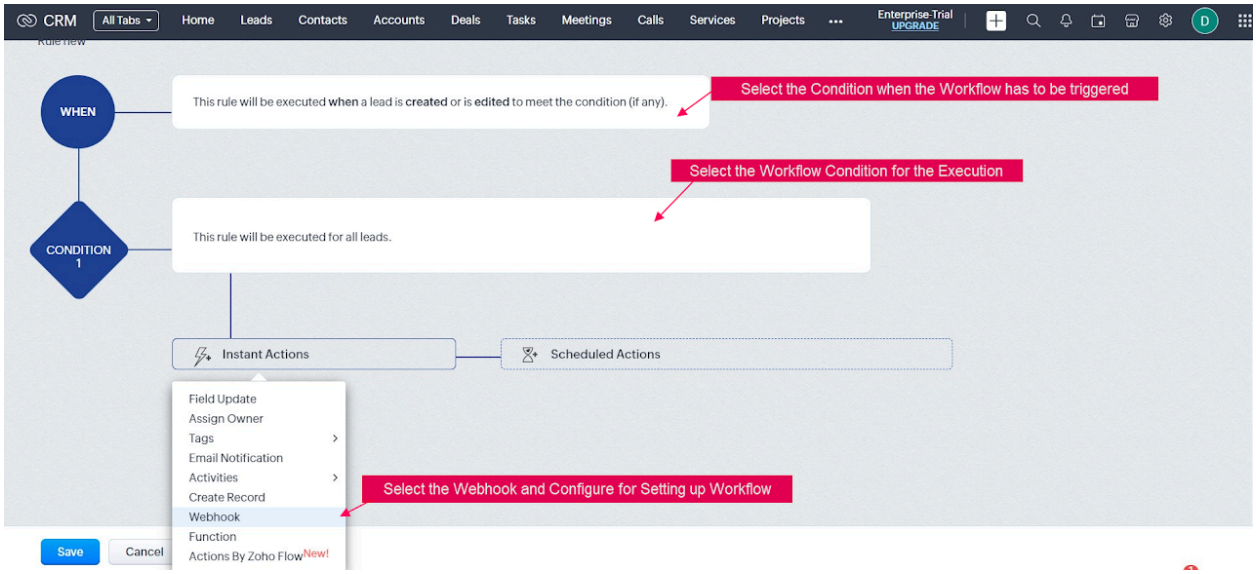
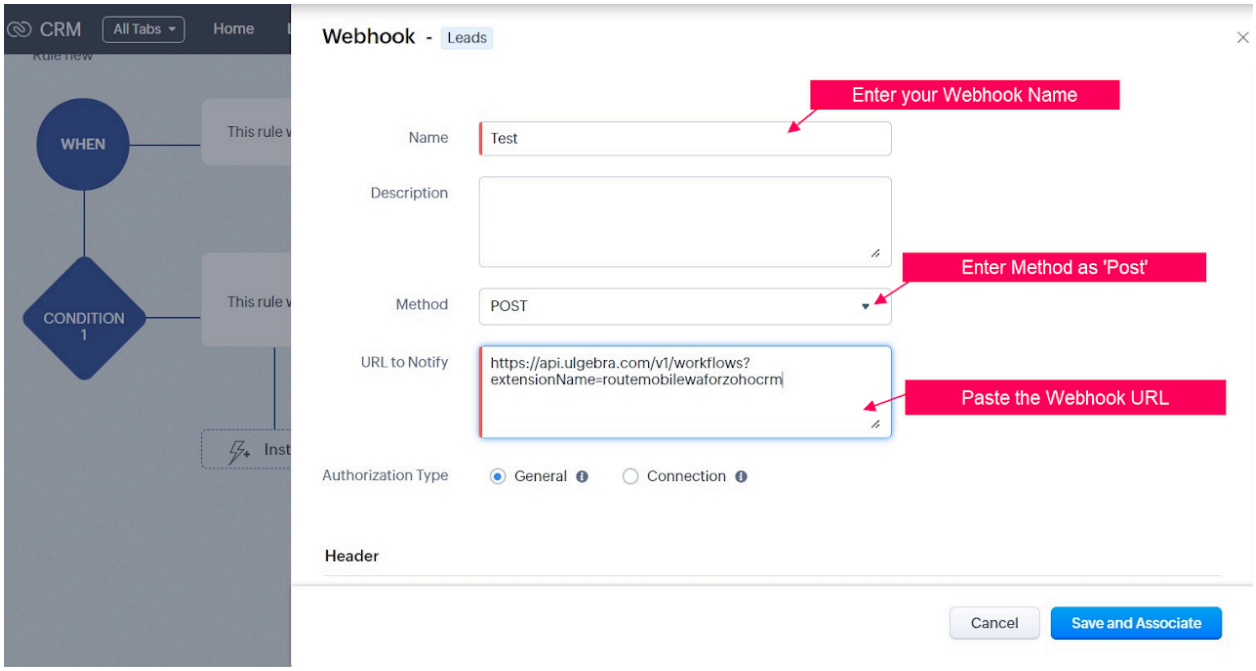


Step 6: Give a name for the Webhook and select the method as **POST.** Paste the webhook URL in the space provided which you have already copied from the extension configuration page.



Step 7: Under "Body", select the Type as "Raw" and Format as "JSON". Paste the parameters in the space provided and replace the "FILL_HERE" option with the required values.

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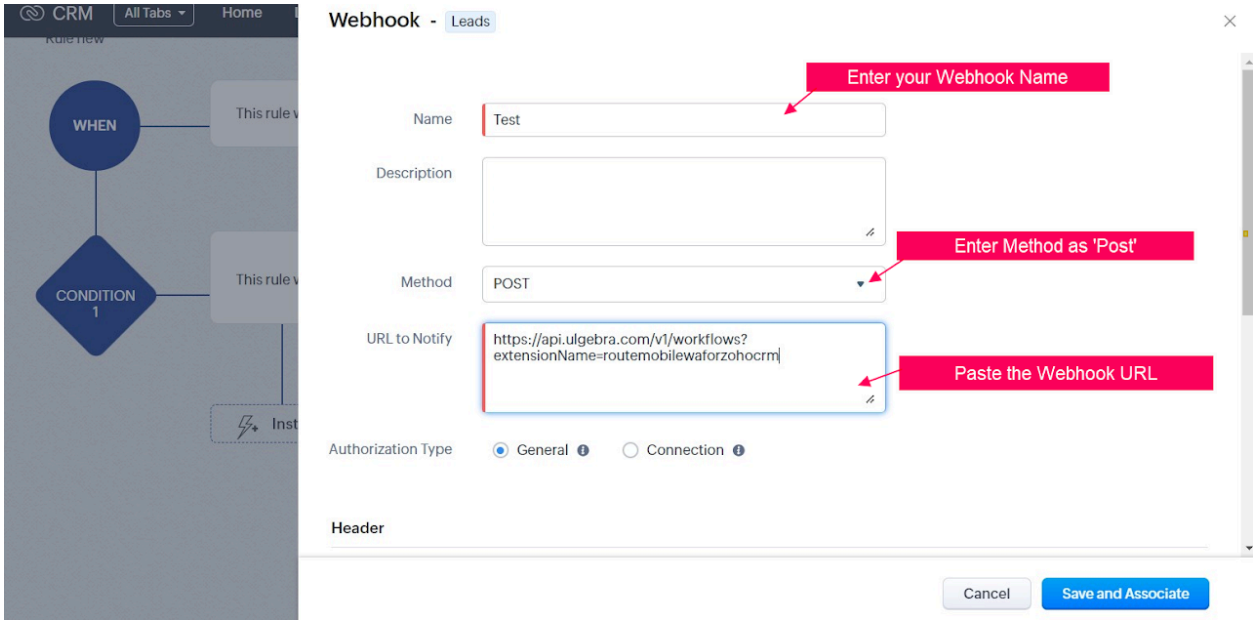

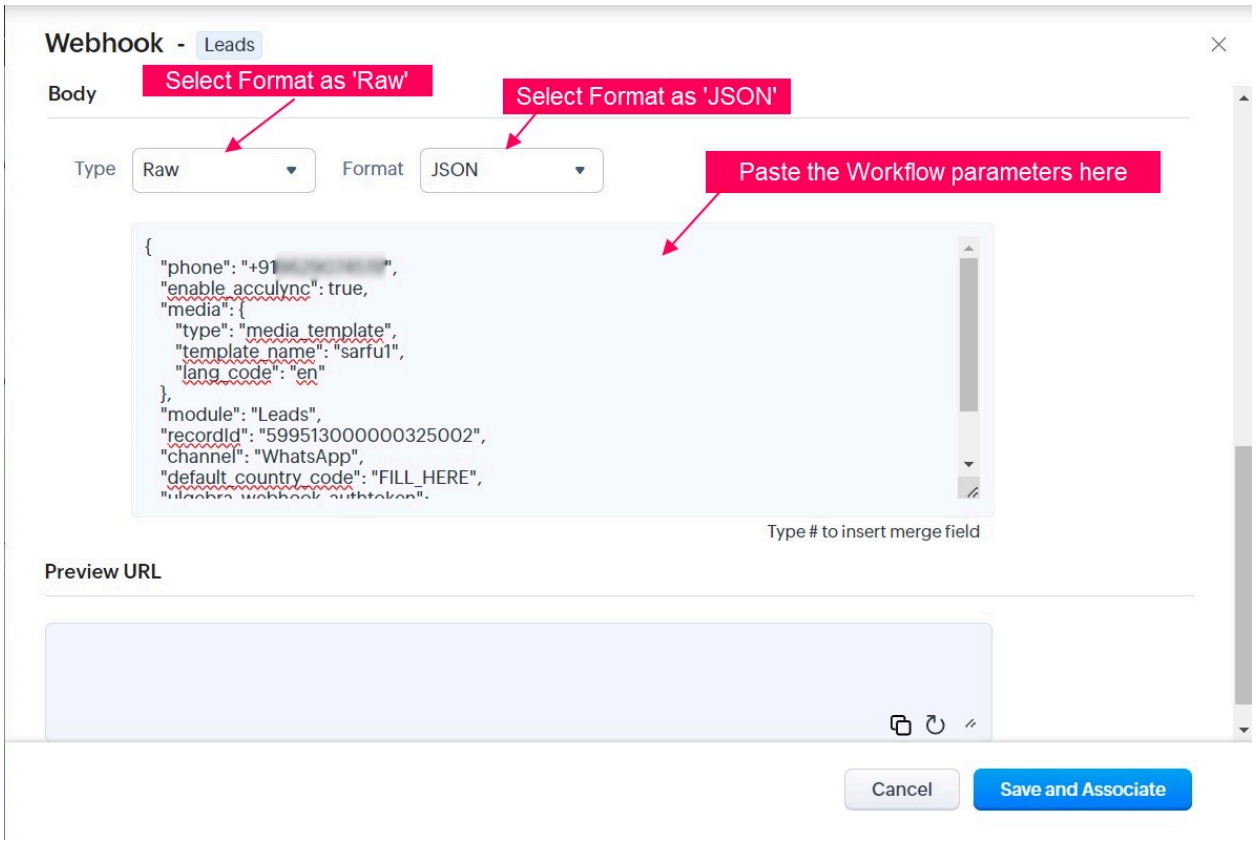

Step 7: Save the Workflow.

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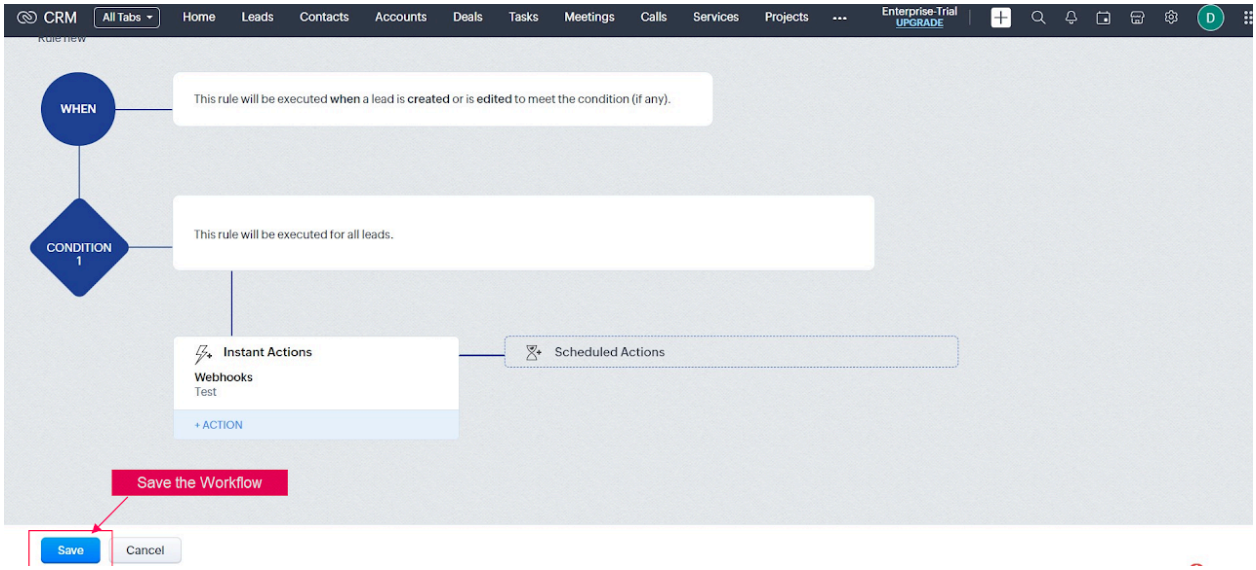
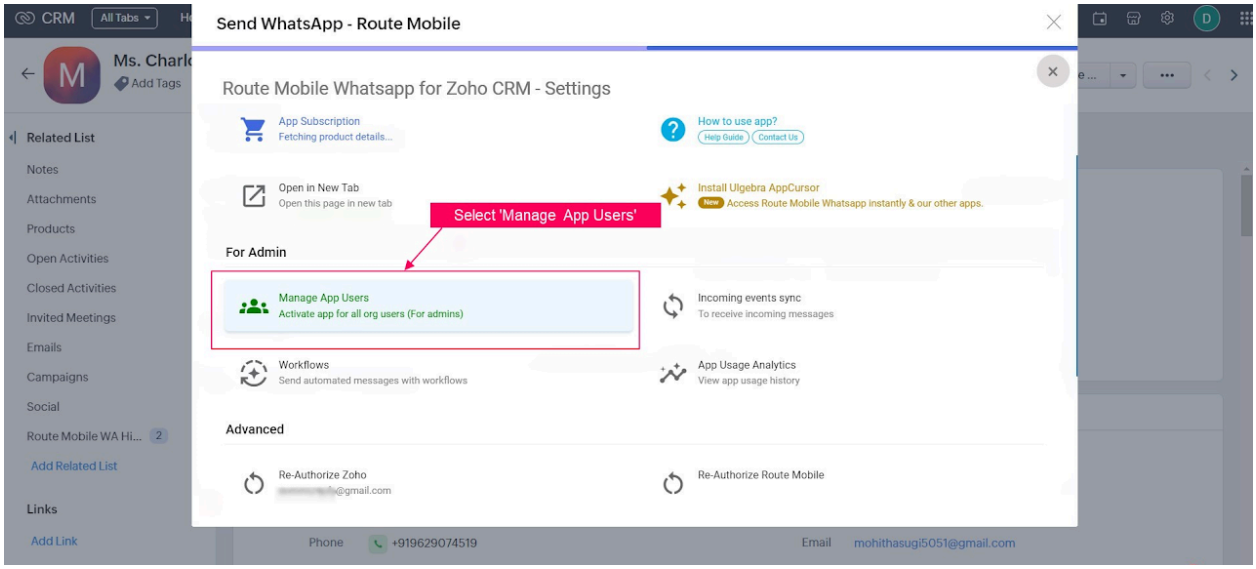


Share Route Mobile Credentials with other Zoho CRM users

Step 1: Go to any of the Zoho CRM leads/contacts --> Click the **"Send Route Mobile - WhatsApp"** option from the top-right drop-down --> Click the profile picture --> Click "Manage App users". If you are a Zoho CRM admin you can share your Route Mobile credentials with Zoho CRM users so that they can use your Route Mobile account for sending messages.



On the admin system:

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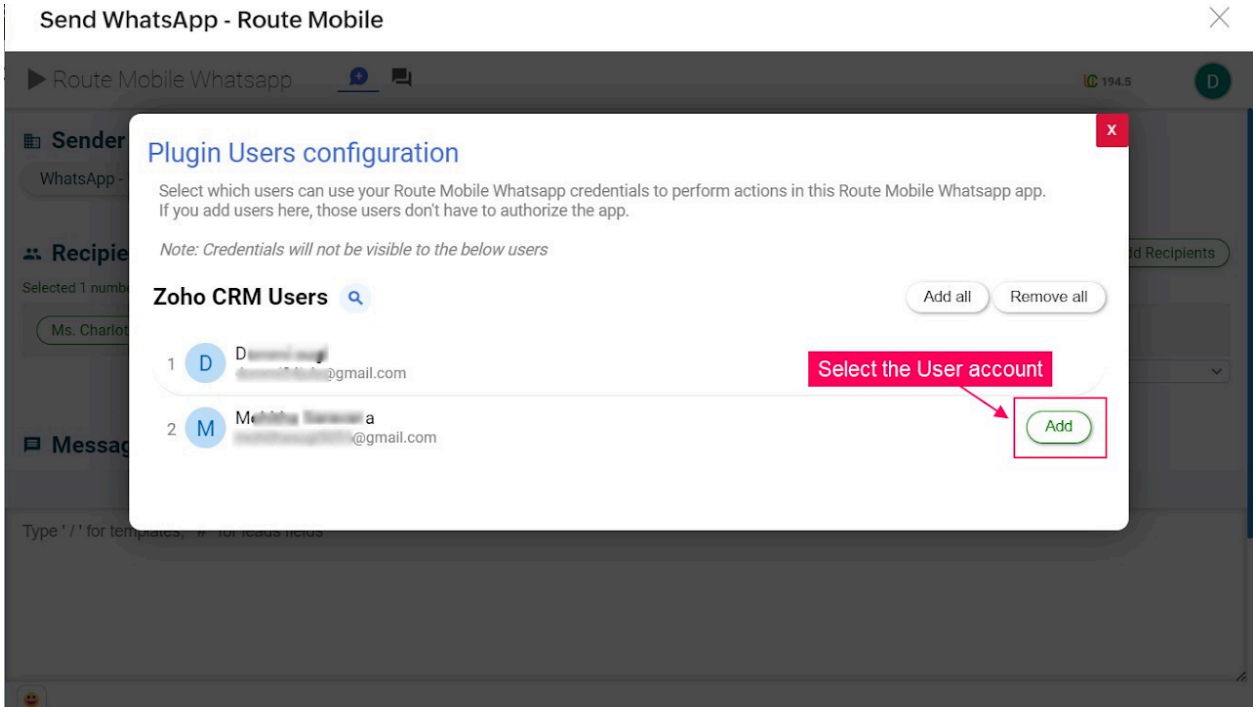
- You can add the Zoho CRM users who can use your Route Mobile account for sending messages.

- You can able to view the list of all Zoho CRM users and you can add them using the **"Add'** button.



On the user system:

The user while re-authorizing the Route Mobile account, you can either use the account shared by their admin or else they can use their account for sending messages. To configure their own account click on the **"Use another account"** option.

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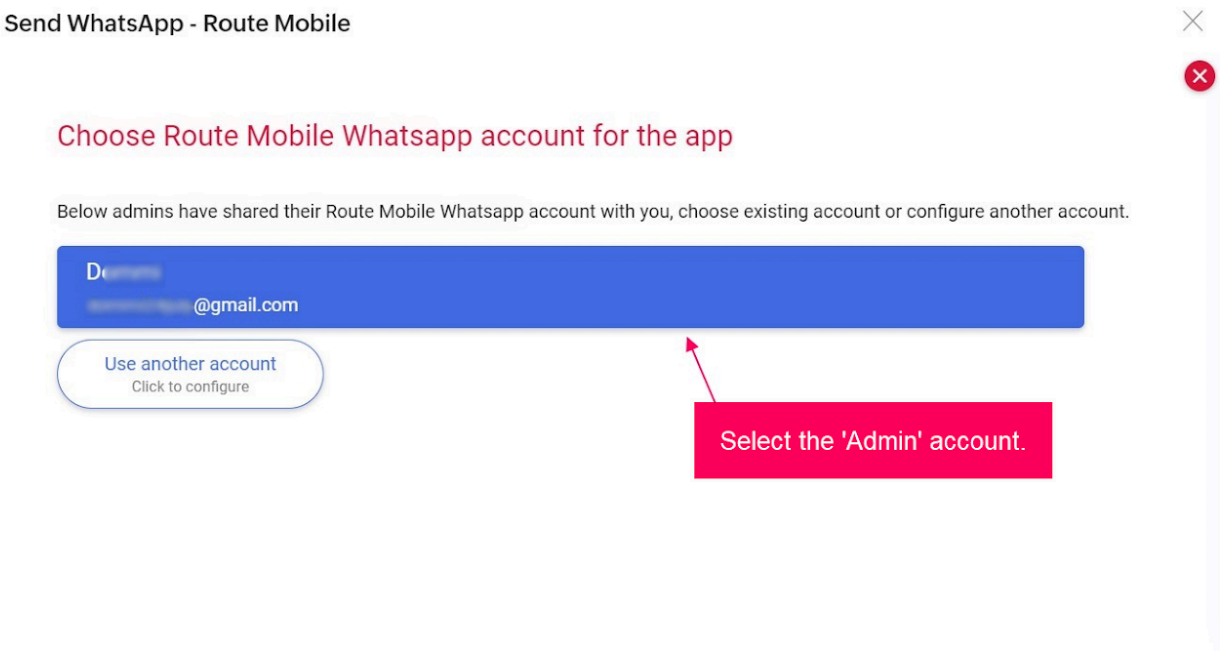
Send WhatsApp - Route Mobile
Choose Route Mobile Whatsapp account for the app
Below admins have shared their Route Mobile Whatsapp account with you, choose existing account or configure another account.
@gmail.com
Use another account
Click to configure
Select the 'Admin' account.