

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.



CRM All Tabs - Home	Leads Contacts Accour	nts Deals Tasks	Meetings Call	ls Services Projec	cts ••• Enterpi UPG	ise-Trial <mark> +</mark> C RADE	. 4 🖬	a 🕸 🖸
Setup	Overview	Screenshots Ra	atings & Reviews	Pricing Vend	or			
Q Search		Start	Trial					
General Users and Control	customers globally. E	Easy to integra Name	e Route N	Nobile SMS/WBS for Z	OHO CRM	te		
Zoho Directory	users to use your au sent messages. Trigg	thorized Rout App t	type Extensio	on		sed dat		
Channels Customization	Benefits:	Produ Porta	uct CRM	_		_		
Automation	- Send automated re	minders to cu Trial o	duration 10 days		Click on 'Contin	Lue'		
Process Management Data Administration	- Alert your users on	the missed o	agree to share the u agree to the Terms	iser details with vendor of Service and Privacy	r upon successful fre Poicy of the vendor.	e trial.		
 Marketplace 	- Share information of	on product up	agree to the Terms	of Service of Zoho Ma	ketplace.			
All Zoho	- Send promotional o	offers, discour		Continue	Cancel			
Google	"To upgrade your acc	count, please write to a	lliances@routemobile	.com"	-	For Support Reque	sts	
Developer Space	Key Features:					Report an issue Share This App		

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

CRM All Tabs • Home	Leads Contacts	Accounts	Deals	Tasks	Meetings	Calls	Services	Projects	 Enterprise-Tr UPGRADE	ial 🕂	Q	¢		6	ŝ	
Setup	All Extensions	Installed	Updates													
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▶ General		Route	Mobile V	VhatsA	pp for Zoł	o CRM			~							
 Users and Control 		Send Wha	atsApp Mes	sages fron	n Zoho CRM.				×							
 Zoho Directory 																
 Channels 																
Customization		Cho	oose Use	ers/ Pro	files											
 Automation 		C	D Install f	or admins	only											
 Process Management 		(Install f	or all users	;											
Data Administration		C	Choose	profiles												
 Marketplace 									Click on 'C	onfirm' afte	r choc	osing	the			
All		< Ba	ack				Co	onfirm		promes						
Zoho																
Google																
Microsoft																
 Developer Space 																

Step 4: Now your extension is successfully installed.



ⓒ CRM All Tabs → Home	Leads Contacts Accounts Deals Tasks Meetings Calls Services Projects Enterprise-Trial 🕇 Q Q 🗂 🗃 🕸 💿
Setup	All Extensions Installed Updates
Q Search	Content Conten
General	נס עמיז אות ווי זיסטור גוומו
Users and Control	Name Route Mobile SMS/WBS for ZOHO CRM
 Zoho Directory 	Version 17.0
Channels	Installed by dommi24july@gmail.com
Customization	Installed date 29 Nov 2023
Automation	Short description Send SMS and WhatsApp message using Route Mobile from Zoho CRM.
Process Management	Status Active
Data Administration	Permission Change Permission
 Marketplace 	
All	Widget Configuration
Zoho	Update Base URL of RouteMobileconnectedApp Connected App.
Google	
Microsoft	
Developer Space	Installed Components

Authorization

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

ⓒ CRM All Tabs → Home	Leads Contacts Ac	counts Deals	Tasks Meetings	Calls Service	s Projects	•••	Enterprise-Trial	+	Q	Ŷ	i (3
Setup	All Extensions Inst	alled Updates										
Q Search	← Route Mobile S	SMS/WBS for	ZOHO CRM - Set	tings								
 Users and Control Zoho Directory 	Zoho Auti	hentication I	Needed!									
Channels Customization	You need to a	uthorize your Zoh	no Account to procee	d								
Automation Process Management	Select Your Zoho	Account DC:	ourits cons cons	~								
 Data Administration 												
Marketplace All		Click	on Authorize No	ow.								
Zoho Google												
Microsoft												



Zoho Accounts - Google Chrome		- 0
accounts.zoho.in/oauth/v2/auth?respons	$e_type=code\&client_id=1000.BEJADNTOF3QA6RR0FD0MQ61VMNZLBK\&scope=ZohoCRM.users.READ,ZohoCRM.settings.fields.READ,ZohoCRM.org.with the set of t$	READ,ZohoCRM.modules.READ,ZohoCRM.modul
		Down
	ulgebra ulgebra would like to access the following information.	
	Search READ securesearch	
	CRM MNM	
	get custom views	
	 get org data get modules 	
	◎ get fields	
10 C	Retrieve user data Read all the resources in a module	
Click on 'Accept'	Add resources to a module Update resources in a module	
	By clicking the "Accept" button you allow ulgebra to access data in your Zoho account. Accept Reject	

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

© CRM All⊺abs ▼ Home	Leads	Contacts	Accounts	Deals	Tasks	Meetings	Calls	Services	Projects		Enterprise-Trial UPGRADE	+	Q	¢	Ö	B	¢	D
Setup	All Ex	tensions	Installed	Updates														
Q Search	← R	oute Mok	oile SMS/	WBS for	zоно	CRM - Set	ttings											
 General 																		
 Users and Control 																		
Zoho Directory		Autho	rization	needeo	<u>:</u>													
Channels																		
 Customization 					Conti	inue if you're adm	in. If not, cor	ntact admin to pr	ovide access in	Settings -	Manage App Users							
Automation		You need	to authorize	your Route	e Mobile A	Account to pr	oceed.											
 Process Management 																		
Data Administration		Route	Mobile Use	ername														
 Marketplace 																		
All		Route	Mobile Pas	ssword														
Zoho		Posts	ange of a															
Google		Autho	nize															
Microsoft																		
Developer Space				C	lick on	'Authoriz	e'											

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.

CRM All Tabs - Home	Leads Contacts Accounts Deals Tasks Meetings Calls Services Projects Enterprise-Trial <mark>+</mark> Q Q 🗔 🗃 🕸 🌔
Setup	All Extensions Installed Updates
Q Search	← Route Mobile WhatsApp for Zoho CRM - Settings
 General Users and Control 	Route Mobile Whatsapp
Zoho Directory	le Sender
Channels	
 Customization 	Sign in to Ulgebra
Automation	Only Use end of the second of
 Process Management 	Sign in with your Zoho CRM
Data Administration	Sign in with email Email ID
 Marketplace 	
All	G Sign in with Google
Zoho	By continuing, you are indicating that you accept our
Google	Terms of Service and Privacy Policy.
Microsoft	
Developer Space	Note: This page may not work in incognito browser mode

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.

CRM All Tabs - Home	Leads Contacts Accounts Deals Tasks Meetings	Calls Services Projects E	Enterprise-Trial <mark>+</mark> Q 유 🖬 জ 🕸	•
← Ms. Charlottte	e George - jhbnk	Send Email Convert	Edit Send WhatsApp - Route	< >
Related List Notes	Overview Timeline		Send WhatsApp - Route Mobile Create Button Nerses Datases	
Attachments Products Open Activities Closed Activities Invited Meetings Emails	Lead Owner Dommi sugi Email @gmail.com Phone C + Mobile – Lead Status –		Malleye butwis	
Campaigns Social Route Mobile WA Hi 2 Add Related List Links Add Link	Hide Details Lead Information Lead Owner Dommi sugi Title - Phone	Company jhbnk Lead Name Ms. C Email	k 2harlottte George ≇@gmail.com	

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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.

のCRM All Tabs ・ Ho	Send WhatsApp - Route Mobile	C	•	¢	D
Run Macro 👻 Send E	Route Mobile Whatsapp 🧕 🖣 😰				
1 Record Selected. Clear	Select Routemobile Sender ID		1	- 10	
Filter Leads by	WhatsApp - WhatsApp number 🔹		Lead Sour	се	
Q Search					
System Defined Filters	* Recipients + Add Recipients				
Touched Records	Select the required Phone Number field		Cold Call		
Untouched Records	Ms. Charlottte George (Phone)				
Record Action	Default country code: +xx ., do not add country code: +		Advertiser	nent	
Related Records Action					
Locked	Message Select the required template		Web Down	nload	
Activities	Insert Leads Fields 👻 Templates 🗸		Seminar F	artner	
Notes	Type ' / ' for templates, ' # ' for leads fields				
Campaigns			Online Sto	bre	
✓ Filter By Fields					
Annual Revenue			Partner		
City					
Company			External R	eferral	
Converted Account					
Converted Contact					

• 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.

Sender		
hatsApp - WhatsApp number 🔻		
Recipients		+ Add Recipien
ted 1 number Phone Mobile	Configure the	country code
Ms. Charlottte George - (Phone) 🗙		
	Default country code: +XX	do not add country code
		add for all phone numbers add if phone numbers
Message		add if phone number not starts with country code
_ Ir	nsert Leads Fields 👻 Templates 👻	
' / ' for templates, ' # ' for leads fields		

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

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



All Tabs - Ho	Send WhatsApp - Route Mobile		\times	
ro 👻 Send E	Progress			
lected. Clear	All messages have been processed. TOTAL: 1, SENT: 0, FAILED: 0			
by	1. WhatsApp to Ms. Charlottte George-Success			E Lead S
	Close			
Defined Filters				
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Action				Adver
Records Action				Mah P
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Form View of Route Mobile WhatsApp for Zoho CRM

▶ Route Mobile Whatsapp ■	U : 194.3	D
Sender WhatsApp - WhatsApp number Form View		
# Recipients	+ Add Re	cipients
Selected 1 number Phone Mobile		
Ms. Charlottte George - Phone Default country code: +xx , do not add country code:		~
P Message		
Templates 👻 Insert Leads Fields 👻		
Type '/' for templates, ' # ' for leads fields		
۲		
Attach File Send WhatsApp		



Chat View of Route Mobile WhatsApp for Zoho CRM

© CRM All Tabs → Home	Leads Contacts	Send WhatsApp - Route Mobile	\times	e-luai 🕂 < ↔ 🖬 ⊕ 🗰 🕸 🕕 🗄
← Mr. Christoph	er Maclead (San	Route Mobile Whatsapp 🦻 💻 🕼 📧	•	Edit Send MessageBird Mess 💌 🚥
Related List	Overview	WinatsApp-Koutemobile		Last Update : 4 day(s) ago
Notes Attachments Products	Lead	Chat View		
Open Activities				
Invited Meetings Emails	Leac	No previous conversations found. Make sure your recipient number contains Country Code or Initiate a new conversation using WhatsApp Template.		
Campaigns Social	Hide Details			_
MessageBird Messa MessageBird Inbox	Lead Information	Message Note		Florence
Calendly Events Calendly Meetings	Title	Type / for templanes, in for reads neros	Reply D	pher Maclead ()

Inbox View of Route Mobile WhatsApp for Zoho CRM

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CRM All Tabs - Home	Leads Contacts	Send WhatsApp - Route Mobile	\times	e-Trial 🕂 🤇	2 4 🖬 📾 🏶 🛑 🏢		
← M Ms. Hayley Mike	Ison - IOP	Route Mobile Whatsapp D = Enable Notifications	R (1	vert Edit	Send Message		
Related List	Overview 1	🗈 Whatskep: Routerachie 🔻 🍊 (Notifications	ark all as read	4			
Notes	Hide Details						
Cadences Attachments	Lead Information	05-06-2024					
Products Open Activities	Title			vlikelson			
Closed Activities	Phone	Buy now and experience the new standard in Al-powe		ii5051@gmail.com			
Invited Meetings	Mobile	quality.					
Emails	Lead Source	Today					
Campaigns	Industry	TEMPLATE_NOT_FOUND ; Template with name multi					
Social	Annual Revenue	your Routemobile account. PARAM-1: Hayley					
Twilio History	Email Opt Out	Message Note					
Twilio Messages	Modified By	24 Hours Limit: You can only send Whatsapp Template messag			<u>a</u>		
Twilio Inbox		Send WhatsApp Template 🗸 🗸 Add Note		24 06:13 PM	•••		
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Route Mobile Inbox		Twitter	_	0			

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Enable Desktop Notifications

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

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CRM All Tabs - Home	e Leads Contacts	Send WhatsApp - Route Mobile	X 🚾 Ħ q & i a 🕸 🛑 🏢
← M Ms. Hayley Mil	kelson - IOP	Route Mobile Whatsapp 🦻 💻 🗰 Enable Notific	ations 🧟 vert Edit Send Message 🗸 🚥
		🗈 WhatsApp - Routemobile 🔻 🦛 🗰 Notifica	utions ×
Related List	Overview 1		able Now 🖓 Mark all as read
Notes	Hide Details		
Cadences			
Attachments	Lead Information	05.05.2024	
Products	Lead Owner		
Open Activities	Title		vlikelson
Closed Activities	Phone	al a so and al a so a si al al .	i5051@gmail.com
Invited Meetings	Mobile	Buy now and experience the new standard in Al-powe quality.	
Emails	Lead Source		
Campaigns	Industry		
Social	industry	TEMPLATE_NOT_FOUND : Template with name multi your Routemobile account. PARAM-1: Hayley	
Twilio History	Annual Revenue		
Tuilio Messerres	Email Opt Out	Message Note	
TWITIO Messages	Modified By	24 Hours Limit! You can only send Whatsapp Template messag	🤹
Twilio Inbox		Send WhatsApp Template V Add Note	24 06:13 PM
Route Mobile WA Hi 2	Deal		okthe in
Route Mobile Inbox			

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".**



X

Send WhatsApp - Route Mobile

Route Mobile Whatsapp	<u>9</u>	Select "Add New Sender"	L 195.5 D
∎ Sender		/	
WhatsApp - WhatsApp number 🔻	Senders	Show Hidden + Add New Sender	
Recipients Selected 0 number Phone Mobile	WhatsApp - WhatsApp number	¥ ⊗ ā	+ Add Recipients
		Default country code: +xx , do not add country code	~
■ Message			
	Insert Leads Field	is Templates	
Type ' / ' for templates, ' # ' for leads fiel	ds		

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 WhatsApp - Route Mobile

X

▶ Route Mobi	le Whatsapp 🧕 💻	(C 195.)	
E Sender		x Close	
WhatsApp -	Add New Sender Channel		
* Recipie	*Channel Select your Sender Channel		
	*Sender ID Enter Sender ID to use FROM		
	Display Name Enter the Display name of your Sender		
Type 7 Torter	Enter readable name for Sender	_	

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.

© CRM All Tabs → Home Lo	eads Contacts Accounts	Deals Route Mobile W/	A History Services	Projects ••• E	UPGRA		ĉ	i	•
Run Macro 👻 Send Email	Create Task Tags 👻	Send WhatsApp - Route	- Actions -						
5 Records Selected. Clear		Send WhatsApp - Route Mol	bile					1 - 10	< >
Filter Leads by		Create Button	pany	≡ Email	Ξ	Phone	≡	Lead Source	-
Q Search		Manage Buttons	K	@gr I.com	mai	+			
System Defined Filters Touched Records		Christopher Maclead (Sample)	Rangoni Of Florence	christopher- maclead@noemail.cc	m	555-555-5555 📞		Cold Call	
Untouched Records Record Action Related Records Action		Carissa Kidman (Sample)	Oh My Goodknits Inc	carissa- kidman@noemail.com	n	555-555-5555 📎		Advertisement	
Locked Latest Email Status		James Merced (Sample)	Kwik Kopy Printing	james- merced@noemail.cor	n	555-555-5555 📞		Web Download	
Activities Notes		Tresa Sweely (Sample)	Morlong Associates	tresa- sweely@noemail.com	n	555-555-5555 📞		Seminar Partner	
Campaigns	0	Felix Hirpara (Sample)	Chapman	felix- hirpara@noemail.com	n	555-555-5555 📞		Online Store	
Annual Revenue City		Kayleigh Lace (Sample)	Printing Dimensions	kayleigh- lace@noemail.com		555-555-5555 📞		Partner	
Company		Yvonne Tjepkema (Sample)	Grayson	yvonne- tjepkema@noemail.co	om	555-555-5555 📞		External Referral	
Gondradound									

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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'.

Home	Leads	Contacts	Send WhatsApp - Route Mobile	\times	e-Trial	#	Q	Ĉ
d Email	Cre	ate Task	Route Mobile Whatsapp 🔎 🖣	D				
			Select the Sender ID					
		-	WhatsApp - WhatsApp number 👻		Phone			≡
			* Recipients (+ Add Rec	pients	+919629	074519	S	
			Selected 9 numbers (Phone) Mobile Recipient gets fetched		555-555	-5555 🔍	>	
			Ms. Charlottte George - (Phone) X Mr. Christopher Maclead (Phone) X		555-555	-5555 🔍	>	
			Mr. Christopher - (Mobile)		555-555	-5555 🖉	>	
			Derault country code: +XX _, up not and country code	~	555-555	-5555 🔍	þ	
			Message Inset Leads Fields Templates	nplate	555-555	-5555 🔍	>	
			Type ' / ' for templates, ' # ' for leads fields		555-555	-5555 @	>	
					555-555	-5555 🔍	>	

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.



Send WhatsApp - Route Mob	ile	\times
Route Mobile Whatsapp		C 194.5
Sender WhatsApp - WhatsApp number	hoose Sender ID	
Select from Filte	r of leads Select form Leads Import	+ Add Recipients
+xx -	All Locked Leads th country code Add Cancel	
Ms. Charlottte George - (Phone	Converted Leads Junk Leads	
	Mailing Labels Default country code: +xx , do not add country code My Converted Leads	de v
Message	My Leads Not Qualified Leads Open Leads	
Type ' / ' for templates, ' # ' for leads fields		

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.

CRM All Tabs - Home Leads	Contacts Accounts Deals Route Mobile WA Histo	ory Services Projects	Enterprise-Trial <mark>+</mark> Q & 🖬 🗃	۵ 💿 🗰
All Route Mobile WA History 👻	View the 'Route Mobile WhatsApp History		E Create Route Mobile WA	Actions 👻
Total Records 12	view the roote mobile whatsApp history		10 Records Per Page 💌	1-10 < >
Filter Route Mobile WA History by	□ Route Mobile WA History Name All - Ξ	Route Mobile WA History Owner	■ Modified Time	≡ ∓=
Q Search	WhatsApp to	Dommi sugi	30/11/2023 12:35 PM	
 System Defined Filters 	 WhatsApp to Ms. Tresa Sweely (Sample) 	Dommi sugi	29/11/2023 11:32 AM	
Touched Records	WhatsApp to Ms. Tresa Sweely (Sample)	Dommi sugi	29/11/2023 11:32 AM	
Untouched Records Record Action	WhatsApp to Ms. Tresa Sweely (Sample)	Dommi sugi	29/11/2023 11:32 AM	
Related Records Action	WhatsApp to Ms. Tresa Sweely (Sample)	Dommi sugi	29/11/2023 11:32 AM	
Latest Email Status	WhatsApp to Ms. Tresa Sweely (Sample)	Dommi sugi	29/11/2023 11:32 AM	
Activities Notes	WhatsApp to Ms. Tresa Sweely (Sample)	Dommi sugi	29/11/2023 11:32 AM	
✓ Filter By Fields	WhatsApp to Ms. Tresa Sweely (Sample)	Dommi sugi	29/11/2023 11:32 AM	
Account_ID	WhatsApp to Ms. Tresa Sweely (Sample)	Dommi sugi	29/11/2023 11:32 AM	
Channel Contact	WhatsApp to Ms. Tresa Sweely (Sample)	Dommi sugi	29/11/2023 11:32 AM	
Created By				
Created Time				
Customer Number				

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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← Ms. Charlottte G	eorge - jhbnk	Send Email Convert Edit Send WhatsApp - Route • •• •
Related List	Overview Timeline	
Notes Attachments		
Products Open Activities		
Closed Activities		
Emails		
Campaigns Social	Route Mobile WA History	Assign New Edit 📭
Route Mobile WA Hi 2	Route Mobile WA History Name WhatsApp to Ms. Charlottte George	
Links	story of ges WhatsApp to Ms. Charlottte George	(A).
Add Link	Add Related List	Record detail page views : Standard View Create a cus Activity Reminders

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.

▶ Route Mobile Whatsa	app 😟 🖳	194.5
E Sender	Choose Sender ID	
WhatsApp - WhatsApp number	V A	
* Recipients	Choose Recipient	+ Add R
Selected 1 number Phone Mobile		
Ms. Charlottte George	Phone)	code
	Select required template	
E Message	se de la constante de la const	
- message		

Send WhatsApp - Route Mobile



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Send WhatsApp - Route Mobile

🕨 Route Mobile Whatsapp 📃 뢷		C 194.5
Sender WhatsApp - WhatsApp number		
Recipients Selected 1 number Phone Mobile	Preview Message ×	+ Add Recipients
Ms. Charlottte George (Phone) X	Hi Team its a test message	~
Message	5: Get Workflow Code BACK SEND	
н		
Team its a test message		
•		

Send WhatsApp - Route Mobile

X





X

Send WhatsApp - Route Mobile

Route N		0Vh1TA-WITK47D11MTM30A==
Sender WhatsApp	Parameters (in body as JSON)	iters to send WhatsApp Messages
Recipie	Workflow code for given inputs, change paramters below if needed	COPY dd Recipien
ected T numb	ł	
Ms. Charlot	<pre>"phone": "+919629074519", "enable_acculync": true, "enable_acculync": true,</pre>	
	<pre>"type": "media_template", "template_name": "sarfu1",</pre>	
lessag	"lang_code": "en" }, "module": "Leads",	
	<pre>"recordId": "599513000000325002", "channel": "WhatsApp", "default_country_code": "FILL_HERE",</pre>	
its a test	<pre>"ulgebra_webhook_authtoken": "cm91dGVtb2JpbGV3YWZvcnpvaG9jcm@uSDFOUDhZSDNlcE9XblR }</pre>	LdU1oNlVPeTFGREdaMi5fU0FBU18yC
	You may need to replace module, recordid and other params with Zoho CRM place holders while	configuring workflows

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.

© CRM	All Tabs - Home Leads	Contacts Accounts Deals	Tasks Meetings Calls Services	Projects Enterprise-Trial UPGRADE	<mark>+</mark> < 4 🖬 🗃 🛱	\$ 🖸 #
	Setup Q Search				Customize Setup)
	Personal Settings Company Details Calendar Booking Motivator	Users Security Control Compliance Settings Territory Management Trusted Domain + Support Access	Single Sign-On(SAML) Security Policies Active Directory Sync Login History	Email Telephony Business Messaging * Notification SMS * Social Chat Signals Portals	Modules and Fields Wizards Pipelines Templates Canvas Customize Home page Translations	
	Automation Workflow Rules Schedules Actions Assignment Case Escalation Rules Scoring Rules Segmentation	t Workflow Rules Process Management Blueprint Approval Processes Review Processes CommandCenter	Data Administration Import Export Data Backup Remove sample data Storage Recycle Bin Audit Log	Marketplace All Zoho Google Microsoft	Developer Space Zia Voice APIs Connections Functions Circuits Client Script	~

Step 3: Select 'Create Rule'.



CRM All Tabs - Home	Leads Contacts Accounts	Deals Tasks Meetings Ca	Ills Services Projects	Enterprise-Trial + Q	4 🖬 🖶 🏶 🕩 📕
Setup	Rules Usage				
Q Search	Workflow Rules				
General	Workflow rules allow you to perform automations can send emails, upda	m certain automatic actions on specific ate fields, create records and much more	ecords based on filter criteria. Workflow	Select "Create R	ule"
Users and Control				· · · · · · · · · · · · · · · · · · ·	
Zoho Directory	Search Q				+ Create Rule
 Channels 	Rule Name	All Modules 🝷	Execute On	Actions Las	t Modified Status -
Customization	Pig Dogl Pulo	Deale	Create or Edit	1	
 Automation 	big bear kule	Deals	create of Edit		
Workflow Rules					
Schedules					
Actions					
Assignment					
Case Escalation Rules					
Scoring Rules					
Segmentation					
Process Management					

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

CRM All Tabs - Home	Leads Contacts Accounts	Create Ne	w Rule			E	nterprise-Trial UPGRADE	-	Q Ç	ī	# \$ (
tup	Rules Usage Workflow Rules	Module Rule Name	Select	Select the Requ	vired Module						
eneral	Workflow rules allow you to perf automations can send emails, up	Description	Leads		4	low					
ers and Control	Search C		Accounts						4	Create I	Rule
nannels	Rule Name		Deals Tasks		el Next		A	Actions	Last M	odified	Status 💌
istomization	Big Deal Rule		Meetings		Create or Edit		1				0
Workflow Rules											
Schedules Actions											
Assignment											
Case Escalation Rules Scoring Rules											
Segmentation											
ocess Management											0

Step 5: Create the required condition for the Workflow



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Rule new	,																			
WHI		This ru	lle will be e	xecuted when	a lead is creat	ed or is edi	ted to mee	et the conditio	n (if any).		Select the (Conditio	on when the Wo	rkflow h	as to l	be tri	ggere	d		
										Select th	he Workflov	w Cond	lition for the Exe	cution						
CONDI	TION	This ru	ile will be ex	xecuted for all	leads.				*											
		F+ 1	nstant Act	ions			*	Scheduled A	Actions											
		Field Up Assign Tags Email N Activiti Create Webho	pdate Owner Notification les Record pok	>	Select t	ne Webh	ook and	Configure	for Settir	ng up Work	kflow									
Save	Cancel	Function	on s By Zoho F	low ^{New!}																

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.

	Home I	Webhook - Lea	ds	×
WHEN	This rule v	Name	Test	ter your Webhook Name
		Description		Enter Method as 'Post'
	This rule v	Method	POST	
		URL to Notify	https://api.ulgebra.com/v1/workflows? extensionName=routemobilewaforzohocrm	Paste the Webhook URL
	<mark>⁄</mark> ∕≁ Inst	Authorization Type	General Connection	
		Header		
				Cancel Save and Associate

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.



	Home I	Webhook - Lea	ds	\times
			Enter your Webhook Name	^
WHEN	This rule v	Name	Test	
		Description		
			Enter Method as 'Post'	
CONDITION	This rule v	Method	POST **	
		URL to Notify	https://api.ulgebra.com/v1/workflows? extensionName=routemobilewaforzohocrm Paste the Webhook URL	
	🖓 Inst	Authorization Type	General Connection	
		Header		Ŧ
			Cancel Save and Associate	



Step 7: Save the Workflow.



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Rule flew																			
WHE	N	Thisru	ule will be e	executed wher	n a lead is create	ed or is edi	ited to mee	et the conditio	n (if any).										
CONDIT		Thisru	ule will be e	executed for all	l leads.														
		Webh Test	Instant Ac looks	tions				Scheduled /	Actions										
		+ ACTI	ON																
	Save	e the Wo	rkflow	•															
Save	Cancel																	-	

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.

CRM All Tabs - He	Send WhatsApp - Route Mobile		\times	6	() ()	D	8
← Ms. Chark	Route Mobile Whatsapp for Zoho CRM - Settings		×	e 🔻			>
Related List	App Subscription Fetching product details	How to use app? (Help Guide) Contact Us					
Notes Attachments Products	Open this page in new tab Select 'Manage App Users	Install Ulgebra AppCursor Compared Access Route Mobile Whatsapp Instantly & our other apps.					
Open Activities	For Admin						
Closed Activities Invited Meetings	Manage App Users Activate app for all org users (For admins)	Contraction incoming events sync To receive incoming messages					
Emails Campaigns	Workflows Send automated messages with workflows	App Usage Analytics View app usage history					
Route Mobile WA Hi 2	Advanced						
Add Related List	Re-Authorize Zoho	O Re-Authorize Route Mobile					
Links							
Add Link	Phone +919629074519	Email mohithasugi5051@gmail.com	m				

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.

Send WhatsApp - Route Mobile		\times
Route Mobile Whatsapp 🔎 🖳	194.5	D
Image: Sender WhatsApp Plugin Users configuration WhatsApp Select which users can use your Route Mobile Whatsapp credentials to perform actions in this Route Mobile Whatsapp app. If you add users here, those users don't have to authorize the app. ** Recipie Note: Credentials will not be visible to the below users Select 1 nume Add all Remove (Ms. Charlet Add all Remove 1 D Add all Remove 2 M Message 2 M Message Type '/' for leftpratesy in the results include Add all Remove	all d R	ecipients V

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.



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.

De	
@gmail.com	
Use another account Click to configure	
	Select the 'Admin' account.