

V-1.0

# ZOHO CRM - SMS ALERT ADMIN SETUP GUIDE



[www.smsalert.co.in](http://www.smsalert.co.in)

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## Contents

1.	1.1. Purpose.....	2
	1.2. Integration Process .....	2
	1.2.1. Steps to Send SMS to any Contact or Lead .....	2
2.	Contact Information.....	2

# 1. Integration

## 1.1. Purpose

SMS Alert integration with ZOHO CRM enables you to notify your customers and leads via Text Message (SMS), like you can send your office address if a client wants to visit your office, you can send him your bank details, if he is about to make purchase, send offers or discounts to leads, or any other important information.

## 1.2. Integration Process

- Signup at [www.smsalert.co.in](http://www.smsalert.co.in) for Transactional, Promotional or International SMS route.
- Install SMS Alert - ZOHO plugin from ZOHO Marketplace.
- Enter your SMS Alert login credentials under **SMS Alert SETUP** menu in Authentication Tab, and click on save.
- You can check your available/allocated Senderid's and your current balance in respective tabs.
- You are now all setup to send SMS.

### 1.2.1. Steps to Send SMS to any Contact or Lead

You can now send SMS to your Contact or Lead directly from the Contact/Lead Page.

- Just Click on **Send SMS** button, a popup window will appear
- Select the senderid from which you want to send the SMS
- Type your SMS Content or select from templates
- Click on **Send** Button
- Your SMS has been successfully sent.

# 2. Contact Information

If you have further doubts and require clarification, you can always feel free to contact us. We will be happy to answer any question you may have.

Our contact information is listed below:

**Email:** [support@cozyvision.com](mailto:support@cozyvision.com)

**Phone:** 080-1055-1055

**To raise a support ticket:** <http://support.cozyvision.com>

**Website:** [www.smsalert.co.in](http://www.smsalert.co.in)