



# MessageWhiz-Zoho CRM Integration

Getting Started Guide



Thank you for downloading MessageWhiz and integrating it with Zoho CRM.  
This guide will help you get started sending SMS and WhatsApp messages to your database.



## Prerequisites

To get started, create a MessageWhiz account. If you plan on sending WhatsApp messages, and do not already have a WhatsApp Business account, you will also need to create a WhatsApp Business account. The WhatsApp Business account, will need to be connected to your MessageWhiz account.

## Creating a MessageWhiz and WhatsApp Business Account

Our dedicated Zoho CRM Account team is ready to help set up your MessageWhiz Account. [Click here](#) to schedule a meeting with your account manager. Your Account Manager will also help you set up your WhatsApp Business account.

### Expected Time Frame

Fully activating your MessageWhiz account within Zoho CRM takes some time, and is typically streamlined with the help of a MessageWhiz Zoho CRM integration expert. Here is what you can expect:

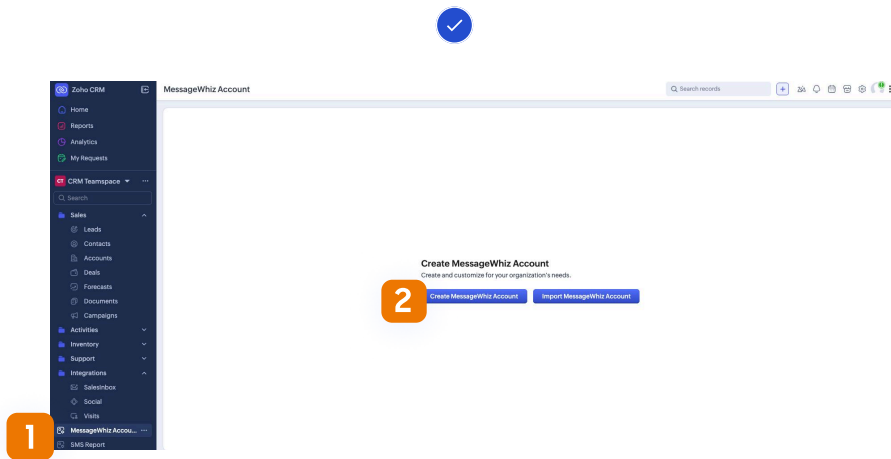
Activity	Timeline	MessageWhiz Assistance Available/Required
 Account Creation	About 30 minutes	<b>Required</b>
 Sending First SMS Message	About 1 hour	<b>Preferred</b>
 Open WhatsApp Business Account	About 10 business days	<b>Preferred</b>
 Integrating existing WhatsApp Business account into MessageWhiz/Zoho CRM	About 1-2 business days	<b>Optional</b>

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## Setting Up Your MessageWhiz Integration in Zoho CRM

Once you have created a MessageWhiz account, you'll create your MessageWhiz sending account(s) inside Zoho CRM.



1. In Zoho CRM, select MessageWhiz from the left-side menu
2. Click Create MessageWhiz Account
3. Enter an Account Name

**Note:** You must create a separate account per channel. For example, if you plan to use SMS and WhatsApp, you will need to create two accounts.

**Best practice:** Use a naming convention that clearly identifies the channel, such as:

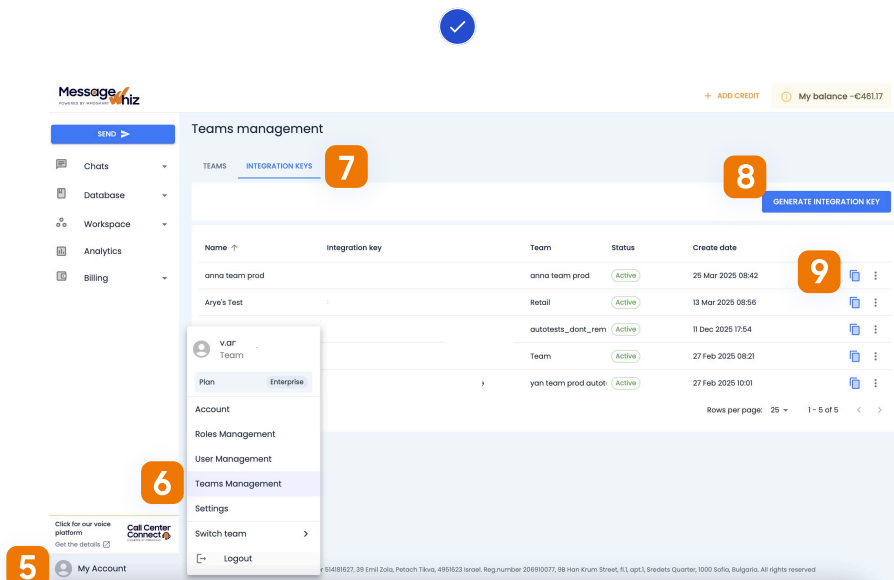
- CompanyName - SMS
- CompanyName - WhatsApp

## Add your MessageWhiz Integration Key

To connect Zoho CRM to MessageWhiz, you'll need an Integration Key from MessageWhiz.

Find your Integration Key in MessageWhiz

4. Log in to the MessageWhiz platform
5. From the left panel, click My Account
6. Select Teams Management
7. Click Integration Key
8. Click Generate Integration Key to create a new one
9. If you have an existing key, click the copy icon on the right side of the screen



## Add the key in Zoho CRM

10. Paste the key into the Integration Key field in Zoho CRM

**Note:** You can reuse the same Integration Key for multiple SMS accounts. However, if you need data segregation (separate teams, reporting, billing, or access), it's best to use a unique Integration Key per business unit/account. Each WhatsApp account needs a unique integration key.

## Complete the account setup

11. For SMS, enter the Sender Name

a. For SMS, sender name is limited to 11 alphabetic characters or 20 numeric characters

12. For WhatsApp, the Sender Name field will change to Sender ID, and must be generated within MessageWhiz

a. Go to MessageWhiz > Chats > Channel Manager

b. Go to your WhatsApp channel

c. Click Copy ID next to the WhatsApp channel

d. Paste the ID into the Sender ID field

13. Select the MessageWhiz Account Owner from the dropdown

14. Select the Channel for this account (SMS or WhatsApp)

15. Click Save

16. Repeat these steps to create all required accounts

The screenshot shows the 'Create MessageWhiz Account' form in Zoho CRM. The form is titled 'Create MessageWhiz Account' and has a 'Save' button. It contains several fields: 'MessageWhiz Account Image' (with a placeholder icon), 'MessageWhiz Account Information' (with sub-fields for Name, Integration key, and Sender ID), and 'MessageWhiz Account Owner' (a dropdown menu). The 'Channel' dropdown is also visible. Orange callout boxes with numbers 11, 12, 13, 14, and 15 point to the Sender ID field, the Owner dropdown, the Channel dropdown, and the Save button respectively. A blue checkmark icon is visible above the form.

## Integration Complete

- Your MessageWhiz account is now connected.
- Your Zoho CRM is successfully linked with MessageWhiz. It is ready for sending SMS or WhatsApp campaigns and tracking delivery reports.



# Sending SMS Messages

You can send SMS messages to your Zoho CRM leads and contacts directly from your Zoho CRM workspace using MessageWhiz.

## To send an SMS message

1. In Zoho CRM, go to Leads or Contacts
2. Select the lead/contact you want to message
3. At the top of the record, open the dropdown next to the Send MessageWhiz button
4. Select your SMS channel  
(Some organizations may have multiple SMS channels available.)
5. Select the Phone field to use for this message (typically Mobile, Office, or Phone)  
Note: SMS messages can only be delivered to mobile numbers
6. The recipient's phone number will automatically populate in the Phone Number field
7. Select the SMS account you are planning on using
8. Enter the Sender Name in the Enter Sender field
  - a. Sender name is limited to 11 alphabetic characters or 20 numeric characters
9. Type your SMS message
  - a. You can include tokens to personalize messages using Zoho CRM fields (e.g., First Name, Last Name, region, etc.)
10. A message preview will appear in the phone mockup on the right side of the screen
11. Click Send

A confirmation popup will appear once the message is successfully sent

The screenshot displays the Zoho CRM interface with the 'Send MessageWhiz SMS' form open. The form includes fields for 'Select phone field' (5), 'Enter phone number' (6), 'Select account' (7), 'Enter sender' (8), and 'Enter message' (9). A 'Send' button (11) is visible. A confirmation popup (10) is shown on the right, displaying a message preview and the text 'The message preview is coming up. Keep an eye out for it.' A blue checkmark icon is visible above the form.

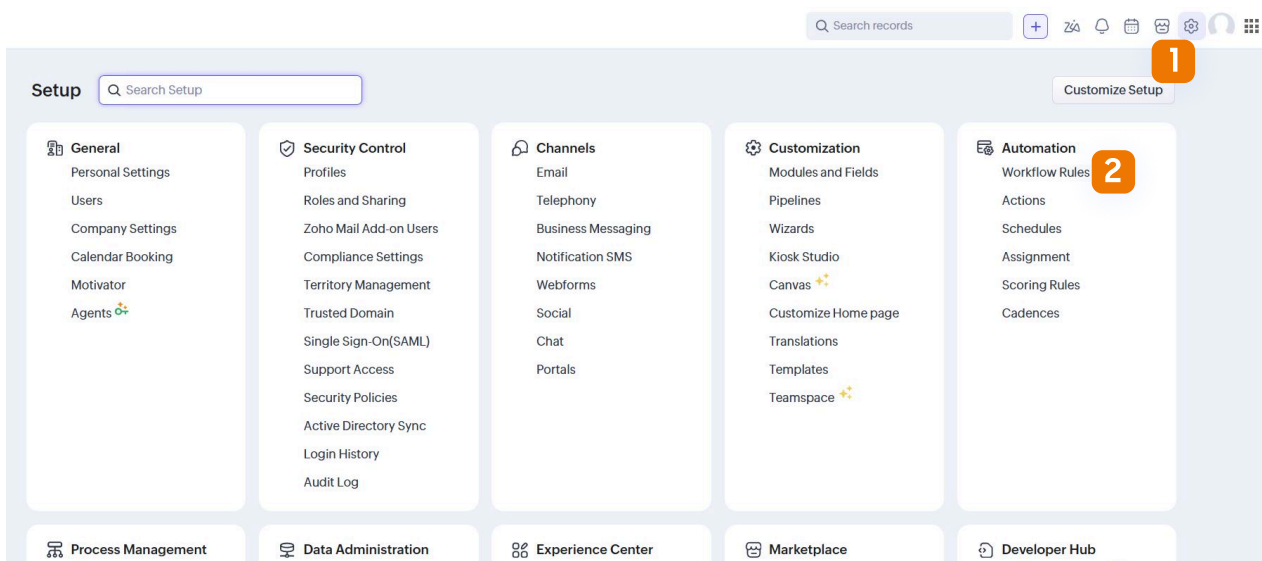
# Create an SMS Messaging Workflow

SMS workflows allow you to automatically send messages based on events in Zoho CRM. For example, a new lead can receive a welcome message automatically, or an existing customer can receive a limited-time promotion after completing a specific action.

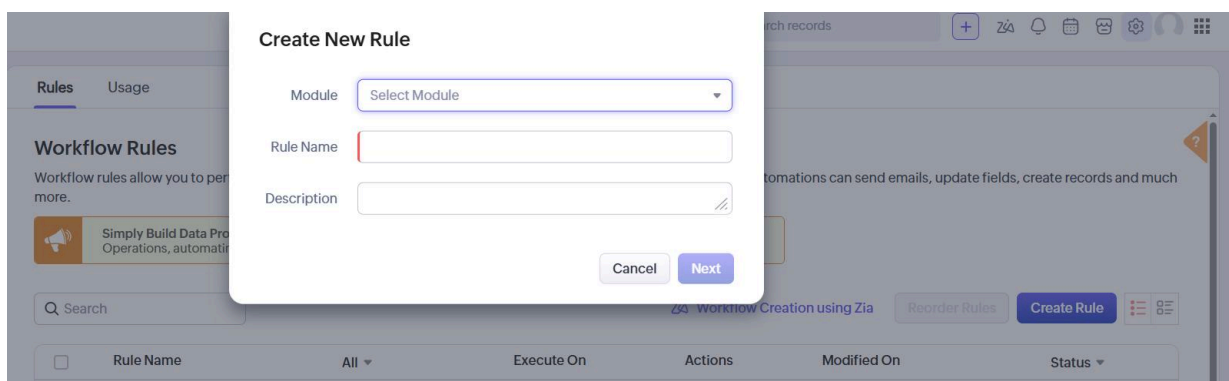
Workflows are created directly inside Zoho CRM.

## Step 1: Create a workflow rule in Zoho CRM

1. Click the Settings icon at the top of your Zoho CRM screen
2. Under Automation, click Workflow Rules



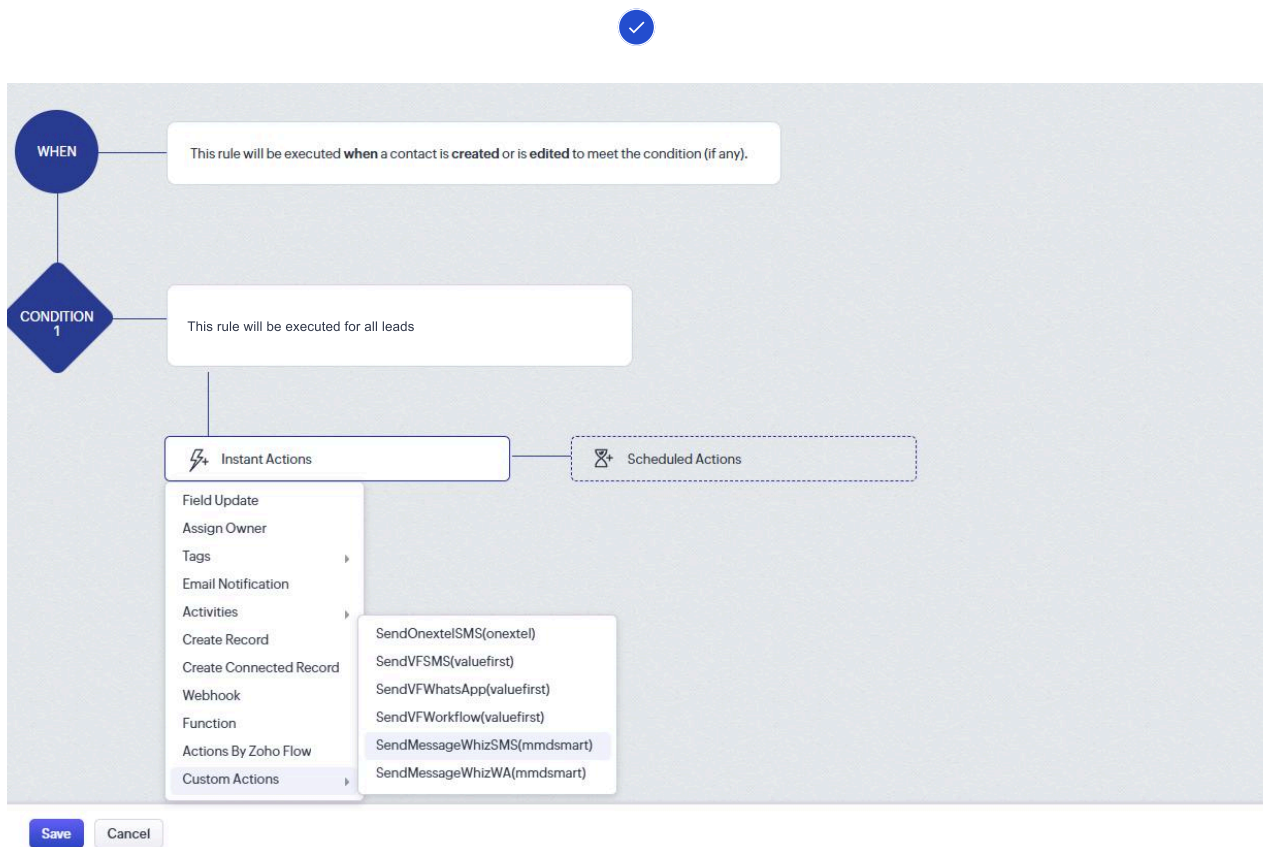
3. Click Create Rule
4. In the rule setup screen:
  - Select the Module where the rule should apply (e.g., Leads, Contacts)
  - Enter a Rule Name  
**Pro Tip:** Choose a name that will be easy to find later among other workflow rules
  - Add an optional Description
5. Click Next



## Step 2: Build your workflow logic

1. Using the Zoho CRM workflow builder, follow the on-screen steps to define:
  - When the workflow should run
  - What conditions must be met
2. Once complete, click Save

**Important:** Make sure you select Custom Actions in the workflow and complete/close the workflow configuration by selecting the SMS action.



## Step 3: Configure the SMS message

After saving the workflow rule, you will be prompted to configure the SMS message.

1. Select the Phone Field (recipient number)
2. Select the Account (MessageWhiz sending account, if applicable)
3. Enter the Sender Name
  - Limited to 11 alphabetic characters or 20 numeric characters
4. Type your SMS message
  - Use tokens to personalize messages (based on Zoho CRM fields)
5. Review the message preview shown on the right side of the screen
6. Click Save

## Result

Once saved, your SMS message will be sent automatically whenever the workflow conditions you defined are met.

## Sending WhatsApp Messages

You can send WhatsApp template messages to your leads and contacts in Zoho CRM directly from your Zoho CRM workspace using MessageWhiz. You will also need to configure receiving inbound messages from WhatsApp within the Zoho CRM.



### To send a WhatsApp message

1. In Zoho CRM, go to **Leads** or **Contacts**
2. Select the lead/contact you want to message
3. At the top of the record, open the dropdown next to the Send MessageWhiz button
4. Select your WhatsApp channel (Some organizations may have multiple WhatsApp channels available.)
5. Select the Phone field to use for this message (typically Mobile, Office, or Phone)  
**Note:** Whatsapp messages can only be delivered to mobile numbers
6. The recipient's phone number will automatically populate in the Enter Phone Number field
7. Select the Account you want to use for this message
8. Select your WhatsApp Template from the dropdown menu
  - WhatsApp templates must be created in the MessageWhiz application
9. The template message will automatically populate in the Enter Message field.

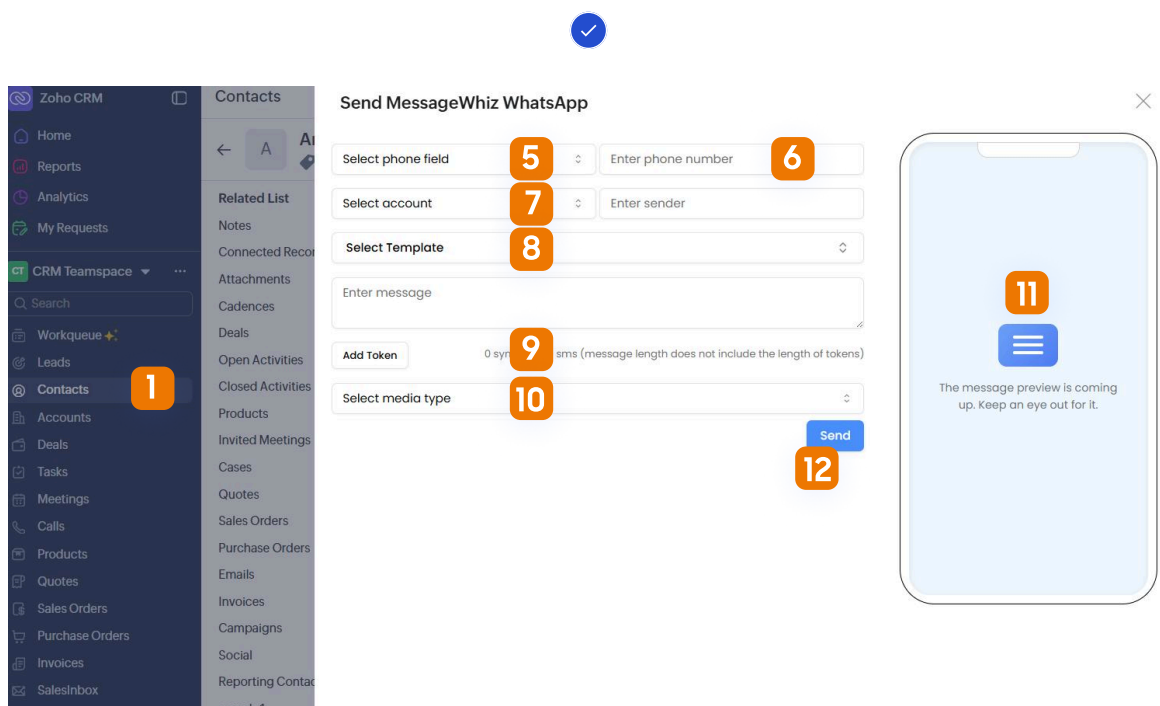
**NOTE:** Templates must be approved by WhatsApp. New templates typically take about 5 minutes to be approved.

- You can edit the message and personalize it using tokens (based on Zoho CRM fields)
10. To add media (such as an image or video), click Select Media Type and paste a link in the field. NOTE: Media can only be added to a template that includes a media field
  11. Review the message preview shown on the phone mockup on the right side of the screen
  12. Click Send

Your WhatsApp message will be sent immediately

### Key Notes

- Once a user responds to a business-initiated message, you can continue the conversation without using a WhatsApp template.
- To view inbound WhatsApp replies inside Zoho CRM, you must first configure inbound WhatsApp messages in the Zoho CRM-MessageWhiz integration.



## Configuring Inbound WhatsApp Messages

Additional configuration that is beyond the scope of this guide is required within Zoho CRM to receive WhatsApp messages. Your MessageWhiz expert can assist you with this when needed.



# Reporting

SMS and WhatsApp reporting can be accessed from the navigation bar on the left side of the screen.

Click SMS Report to see how your SMS messages performed.



The screenshot shows the Zoho CRM interface for the 'MessageWhiz SMS Report'. On the left is a navigation menu with options like Home, Reports, Analytics, My Requests, and CRM Teamspace. The main area displays a table of report records. The table has columns for checkboxes, 'MessageWhiz ...', 'MessageWhiz SMS Re...', 'Modified Time', and 'Error'. The table contains several rows of data with dates ranging from March 19, 2026, to April 20, 2026. A 'Filter MessageWhiz ...' sidebar is visible on the left, and a 'Total Records 77' indicator is at the bottom of the table.

Click WhatsApp Report to see how your WhatsApp messages performed.



The screenshot shows the Zoho CRM interface for the 'All MsgWhiz WhatsApp Report'. The layout is similar to the SMS report, with a navigation menu on the left and a table of report records in the center. The table columns include checkboxes, 'MsgWhiz Wha...', 'MsgWhiz WhatsApp R...', 'Modified Time', and 'Error Description'. The data rows show dates from March 19, 2026, to April 22, 2026. A 'Filter MsgWhiz Wha...' sidebar is on the left, and a 'Total Records' indicator is at the bottom.





## Why Brands Choose MessageWhiz?

- Highest Delivery Rates: Owned routes and intelligent routing ensure consistent global delivery
- 24x7 Expert Support: Dedicated account managers guide strategy, setup, and ongoing optimization
- AI-Optimized Messaging: Generate, test, and deploy stronger variants that improve engagement
- True Omnichannel Reach: Serve customers on SMS, WhatsApp, Viber, RCS, email, voice, and more
- Built-In Automation: Trigger messages from behaviors, transactions, or system updates
- Performance Safeguards: CTR-based rules and automatic throttling protect sender reputation
- Flexible Customization: Adapt workflows, routing, features, and configurations to your needs
- Advanced Analytics: Full transparency into message performance, funnel behavior, and ROI

# Get in touch.



Schedule a call today

[www.messagewhiz.com](http://www.messagewhiz.com)

[info@messagewhiz.com](mailto:info@messagewhiz.com)



## About MessageWhiz

MessageWhiz, powered by MMDSmart, is a performance-driven omnichannel messaging platform that helps marketing, CX, operations, and growth teams turn conversations into measurable outcomes. With smart routing and flexible integrations, brands worldwide deliver timely, reliable experiences across SMS, WhatsApp, RCS, Viber, Telegram, email, and voice.

