Cellcast SMS Zoho Plugin

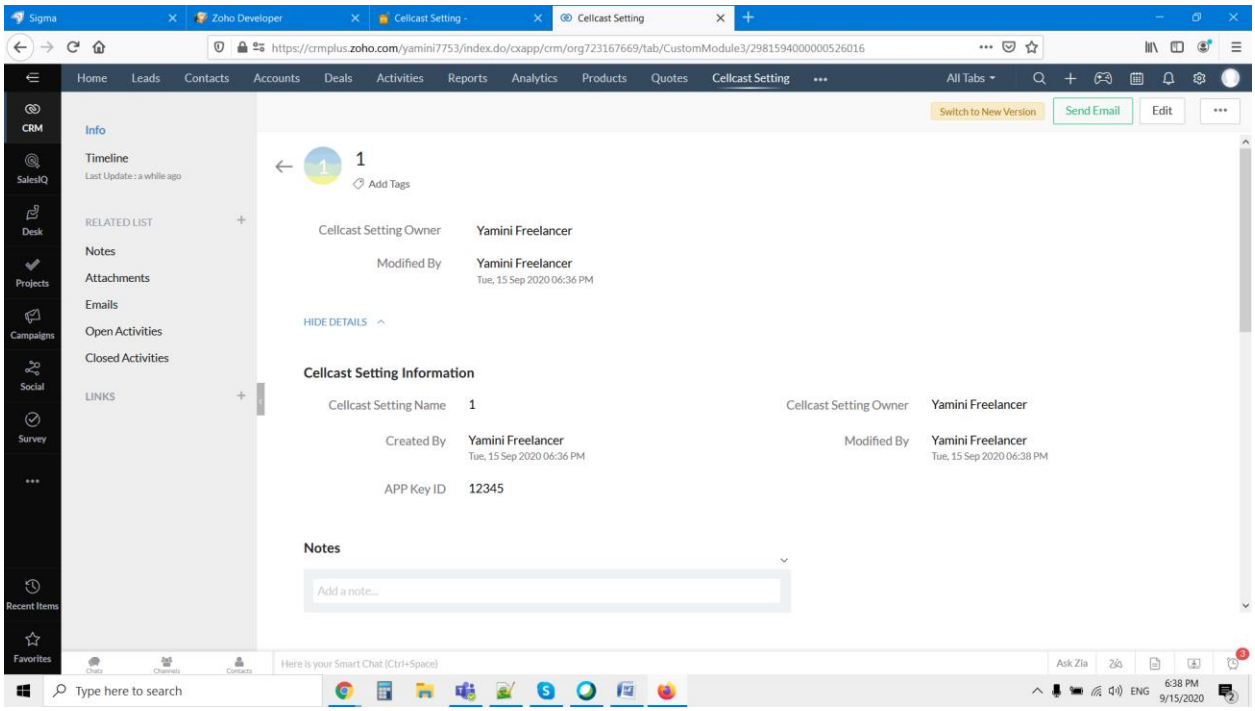
Cell cast allows you to send SMS using Zoho from Lead/Contact/Potential module, Bulk SMS messaging and SMS histories for outgoing and incoming text messages.

Key Features:

- Two-way SMS conversations
- Message history
- Bulk SMS messaging
- Manage SMS templates with dynamic fields

Installation Steps:

1. Install the Cellcast SMS Zoho CRM Plugin from Marketplace
2. Once installed, Navigate to Cellcast setting module and provide APP Key ID



Send SMS Functionality:

1. **Lead/Contact/Deal Module**

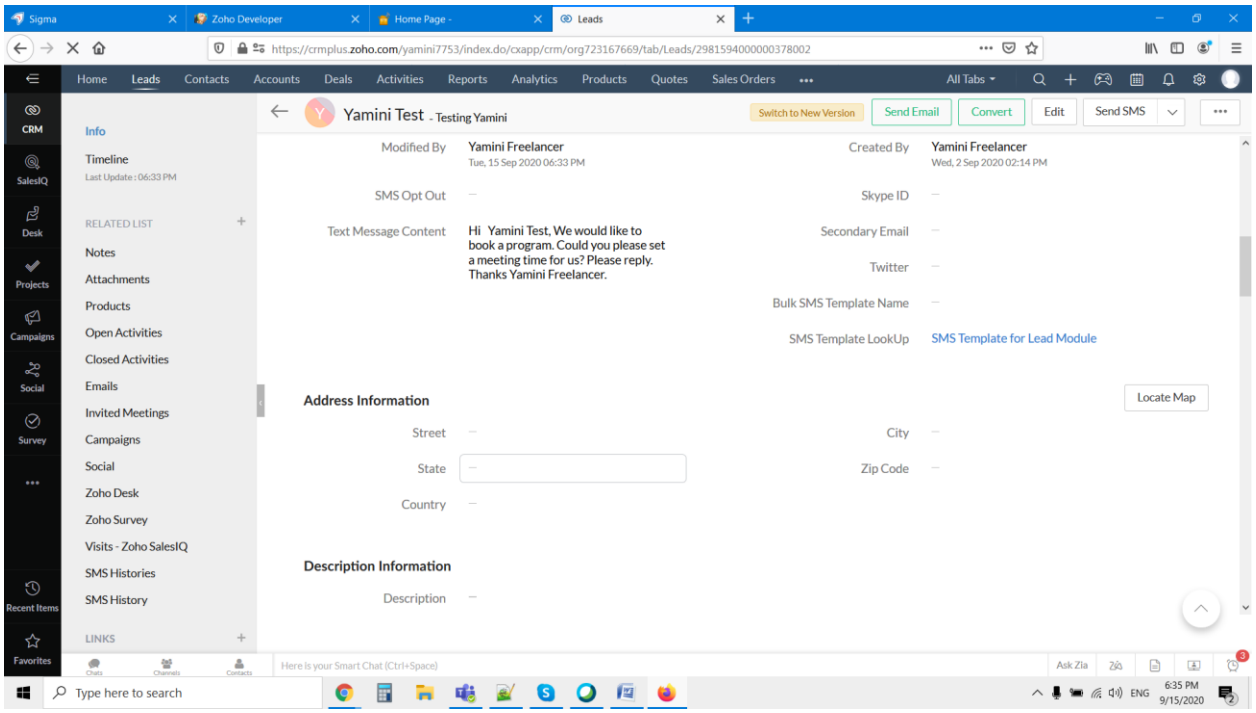
Send SMS button on record view page

Bulk SMS button on list view page

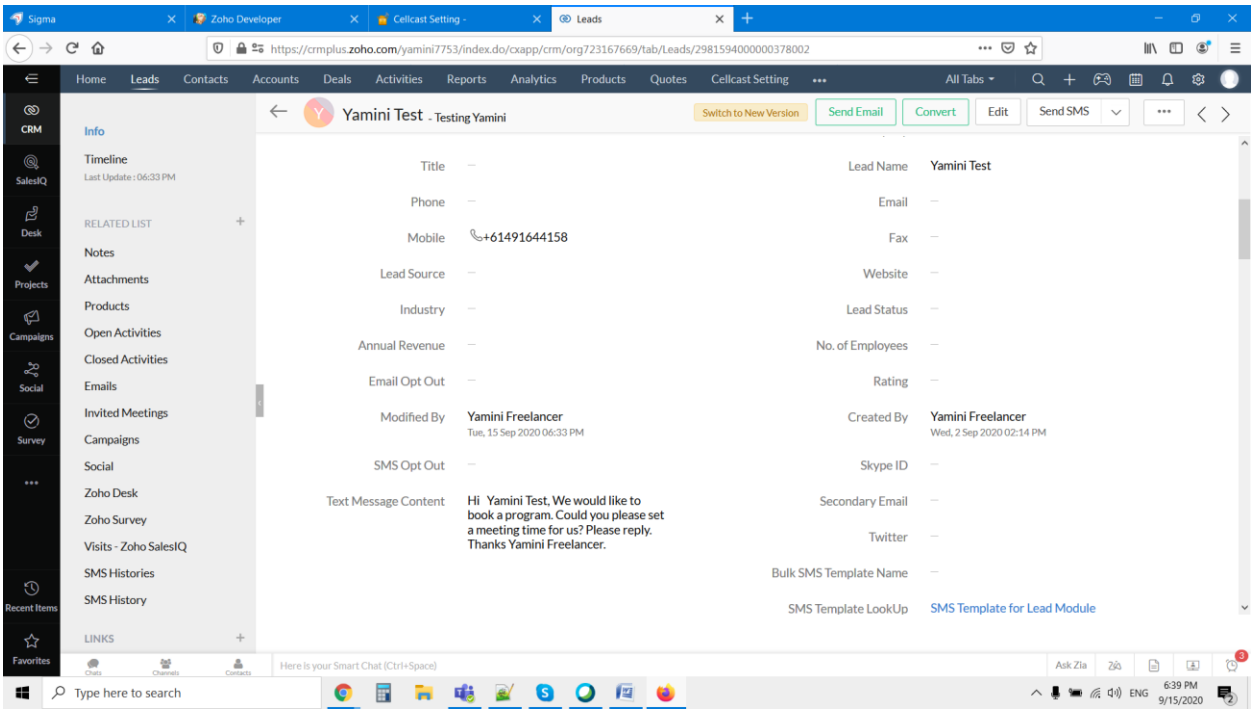
Automated SMS on creation of record using workflow function.

Send SMS Button – On Click of Send SMS Button, it will trigger SMS to mobile number from text message in the Lead module with help of given SMS template details.

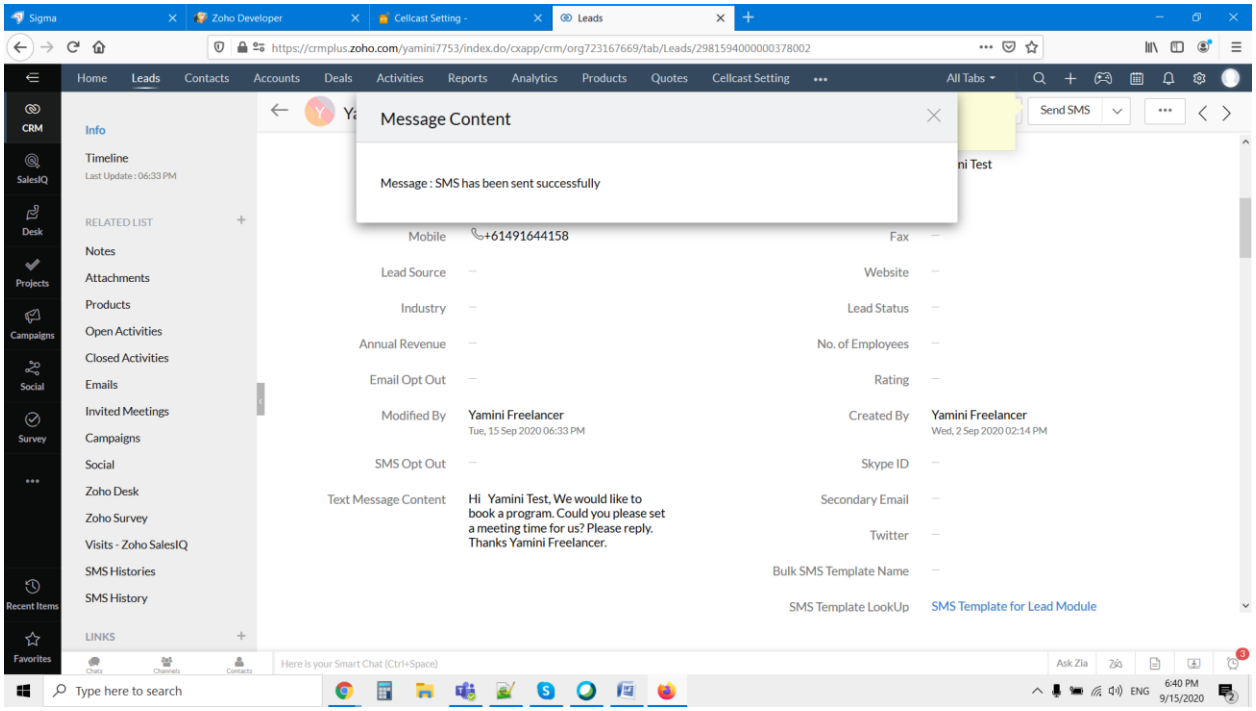
1. Update SMS Template Lookup and see the updated message in text message content field :



2. Click Send SMS button as shown below :



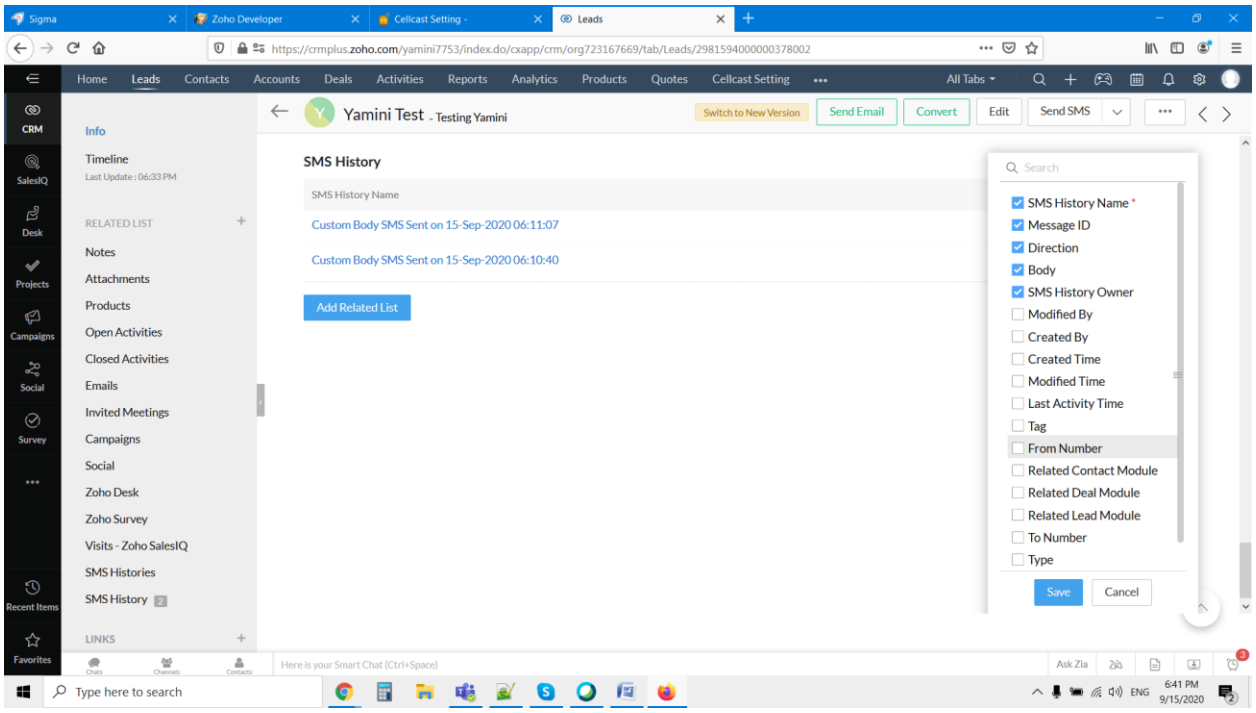
3. Once SMS is sent, you can see the SMS sent successfully modal box as mentioned below.

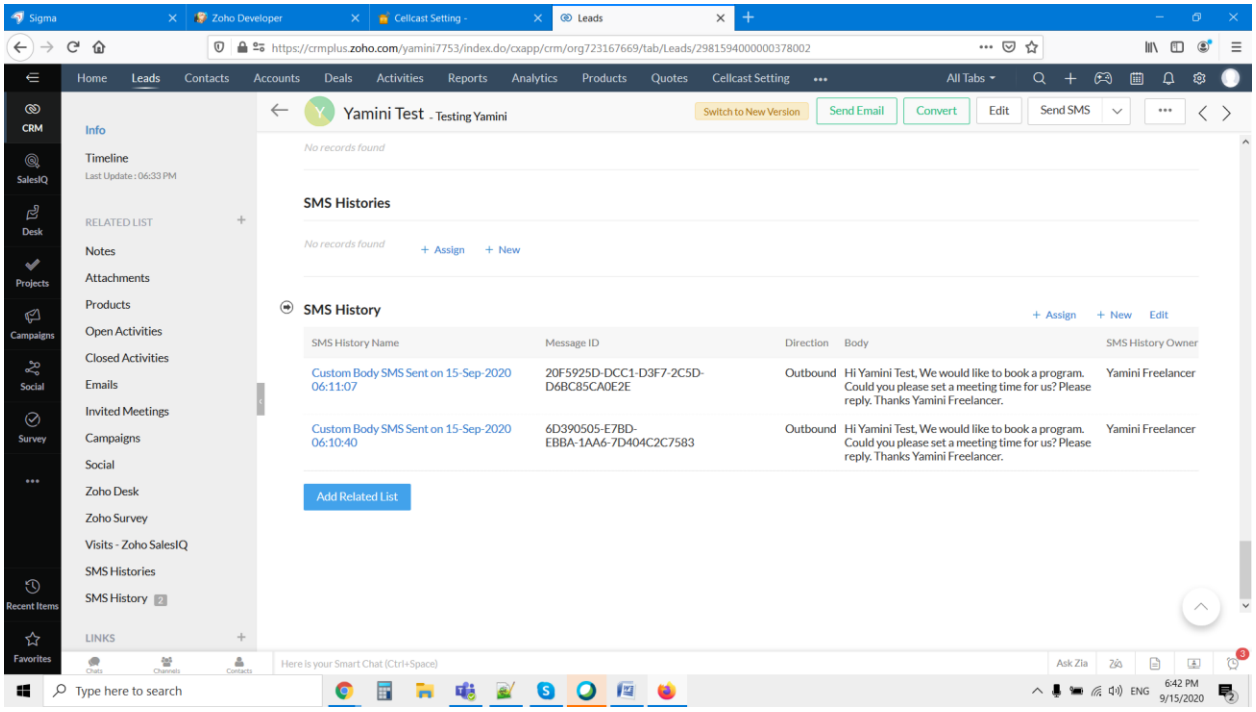


SMS history:

Once SMS is sent then we can able to see SMS history details in Lead related list and separate module as well.

You can add columns in the related list as mentioned below :

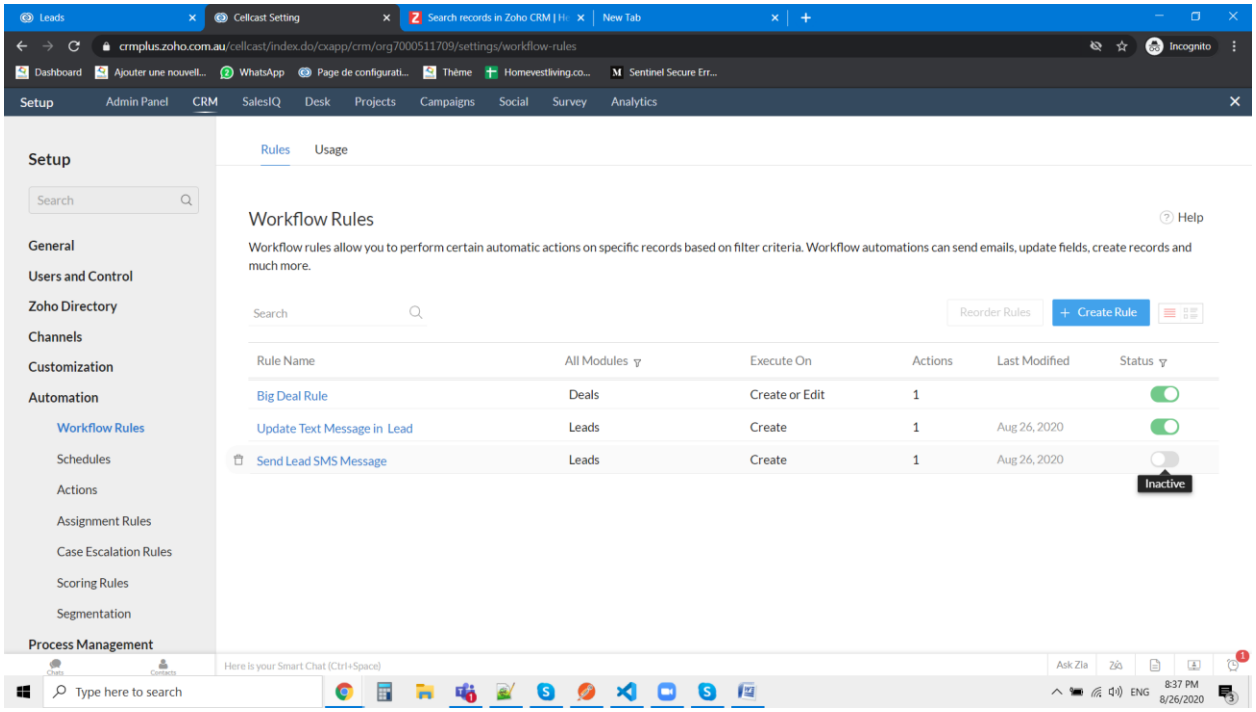

Yamini Test - Testing Yamini
Switch to New Version
Send Email
Convert
Edit
Send SMS
SMS History
SMS History Name
Custom Body SMS Sent on 15-Sep-2020 06:11:07
Custom Body SMS Sent on 15-Sep-2020 06:10:40
Add Related List
Search
SMS History Name *
Message ID
Direction
Body
SMS History Owner
Modified By
Created By
Created Time
Modified Time
Last Activity Time
Tag
From Number
Related Contact Module
Related Deal Module
Related Lead Module
To Number
Type
Save
Cancel


Yamini Test - Testing Yamini
Switch to New Version
Send Email
Convert
Edit
Send SMS
No records found
SMS Histories
No records found
+ Assign
+ New
SMS History
+ Assign
+ New
Edit
SMS History Name
Message ID
Direction
Body
SMS History Owner
Custom Body SMS Sent on 15-Sep-2020 06:11:07
20F5925D-DCC1-D3F7-2C5D-D6BC85CA0E2E
Outbound
Hi Yamini Test, We would like to book a program. Could you please set a meeting time for us? Please reply. Thanks Yamini Freelancer.
Yamini Freelancer
Custom Body SMS Sent on 15-Sep-2020 06:10:40
6D390505-E7BD-EBBA-1AA6-7D404C2C7583
Outbound
Hi Yamini Test, We would like to book a program. Could you please set a meeting time for us? Please reply. Thanks Yamini Freelancer.
Yamini Freelancer
Add Related List

Send Text Message automatically once lead is created:

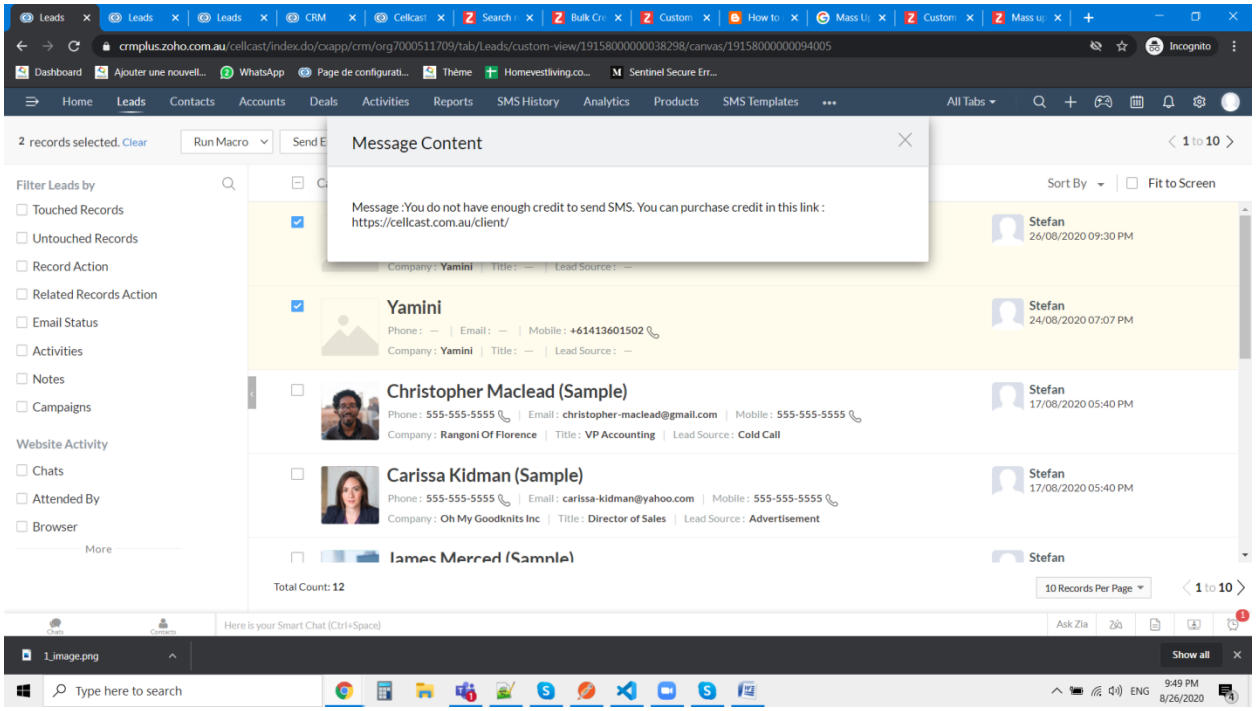
Created workflow rule and associated separate workflow as mentioned below. You can make on/off for each workflow. See the status toggle for each workflow. For now, I have deactivated the workflow to give the difference.

To activate / deactivate – Go Setup -> Automation - > Workflows



Low Credits:

If we don't have credits in cell cast account, we will be throwing error as follows:

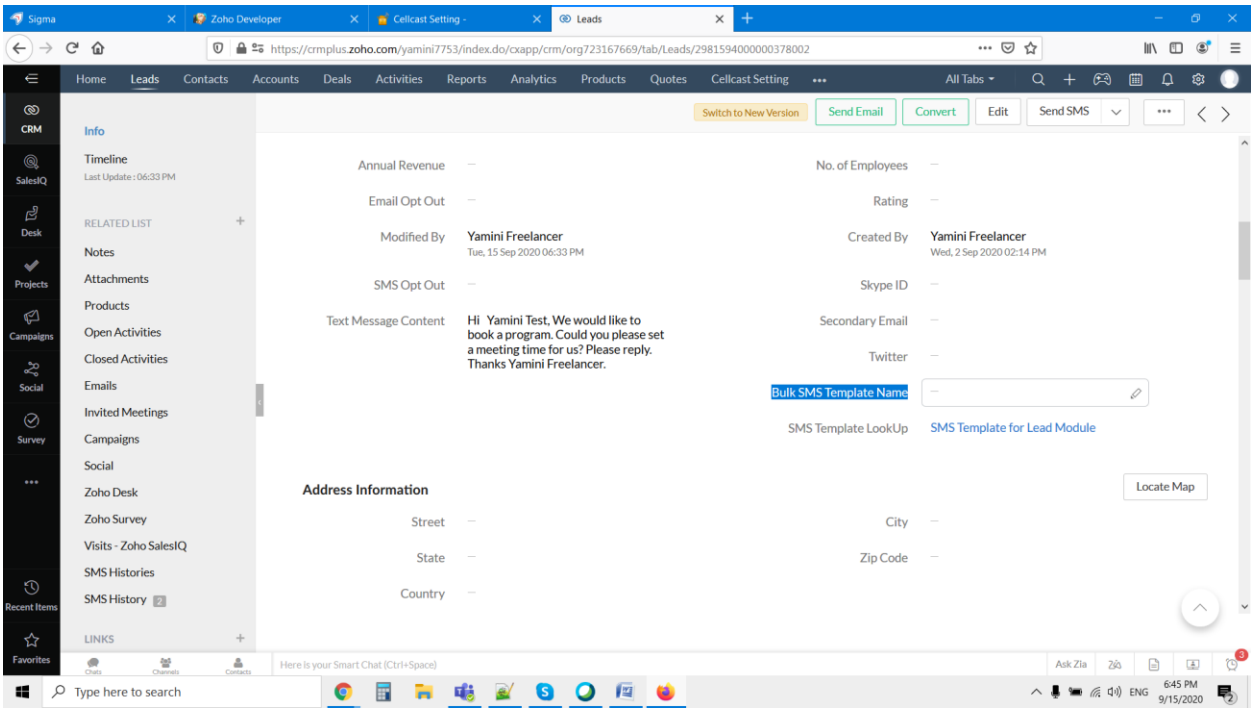


Bulk SMS:

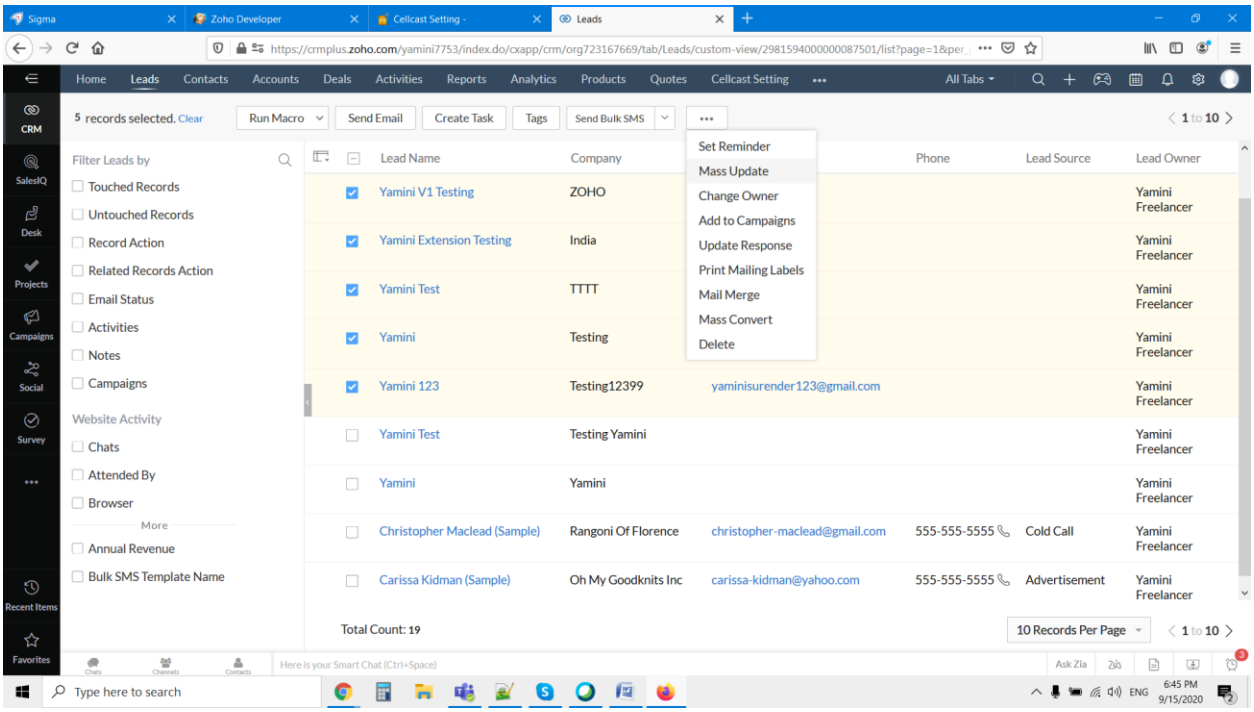
Select list of records that you want to send SMS. – **Bulk Send SMS Button**

Mass update the selected records as mentioned below:

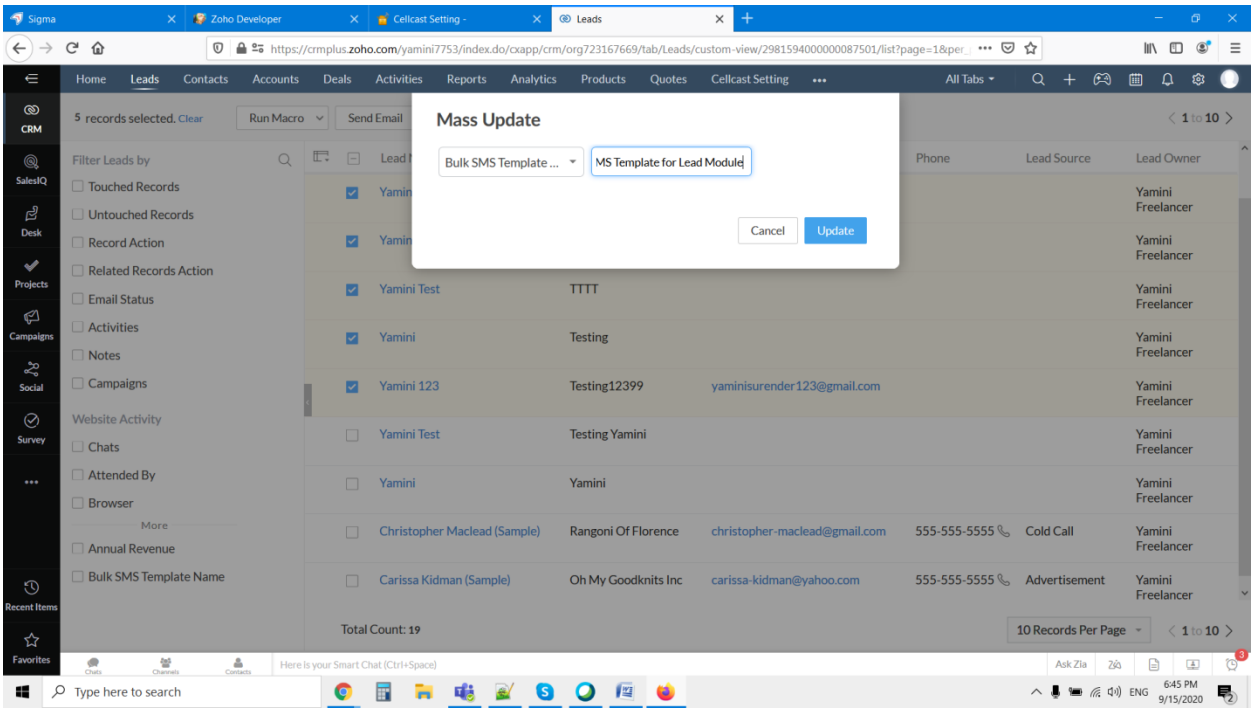
1. Please update exact template name in "Bulk SMS Template Name" as mentioned in SMS Template module to provide the content for BULK SMS functionality.



2. Click Mass Update

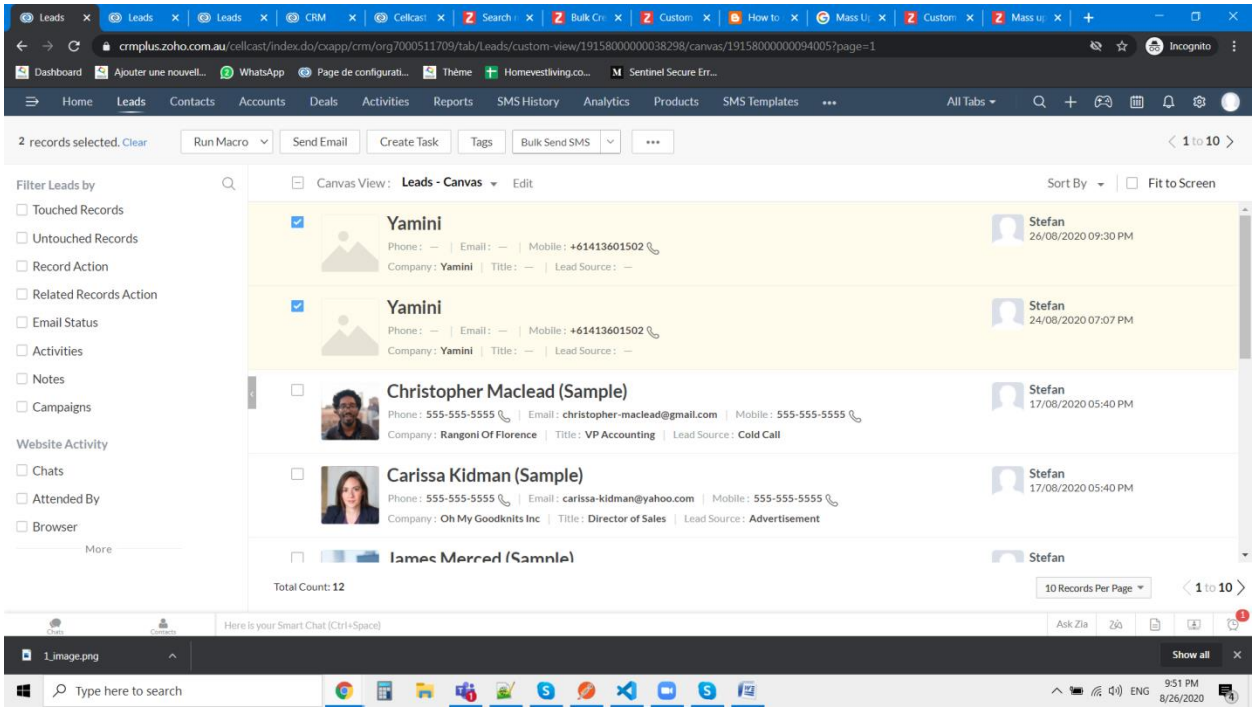


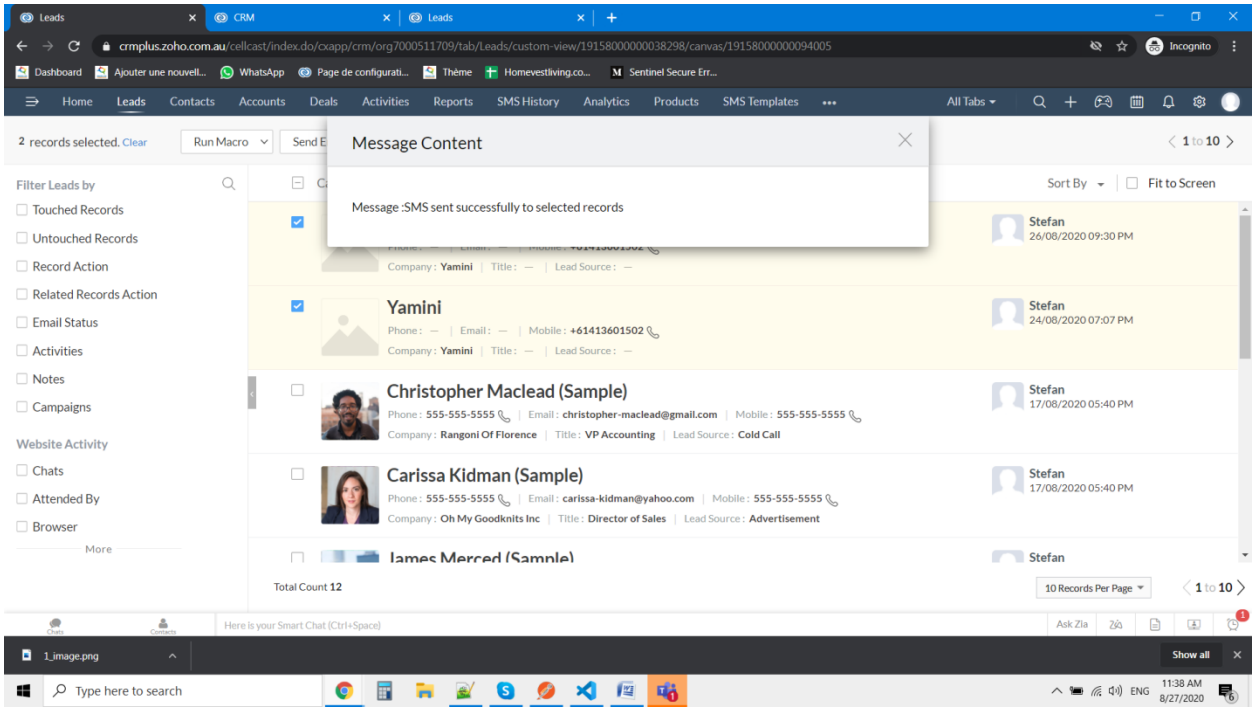
3. Enter exact name of SMS template name here



4. Once it is updated and click Bulk SMS button then SMS will be sent to all selected records.

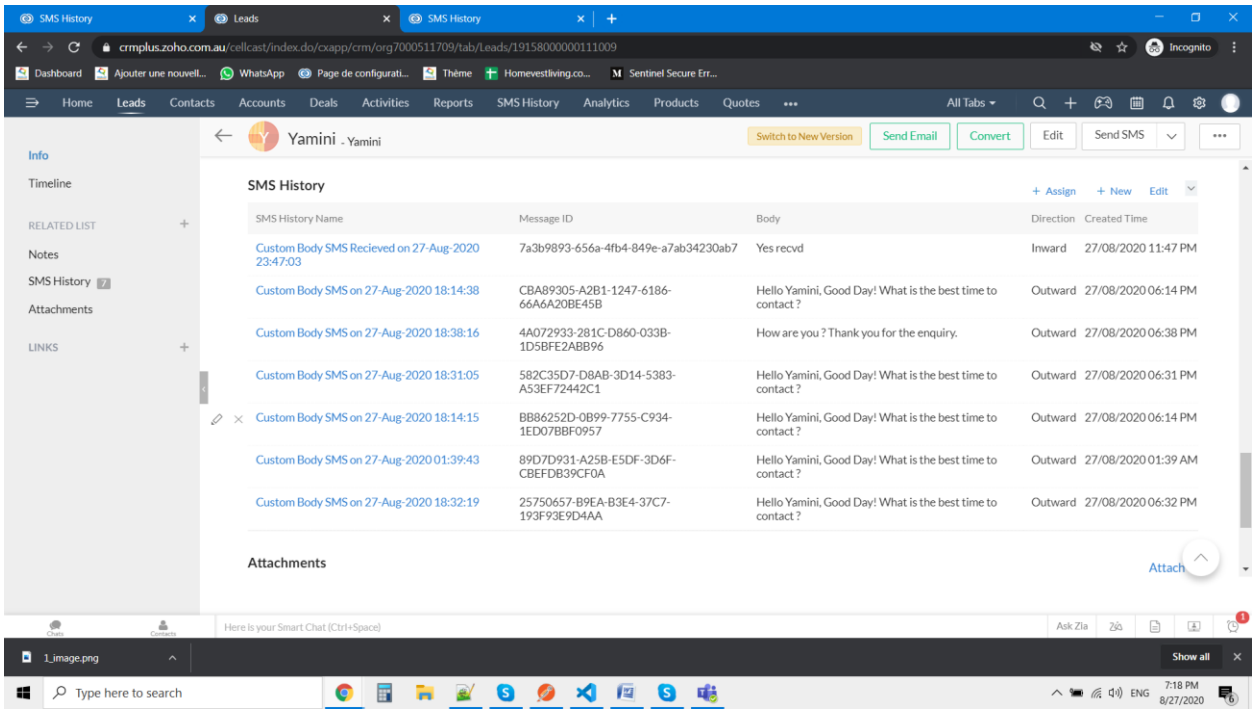
Trigger Bulk SMS button:

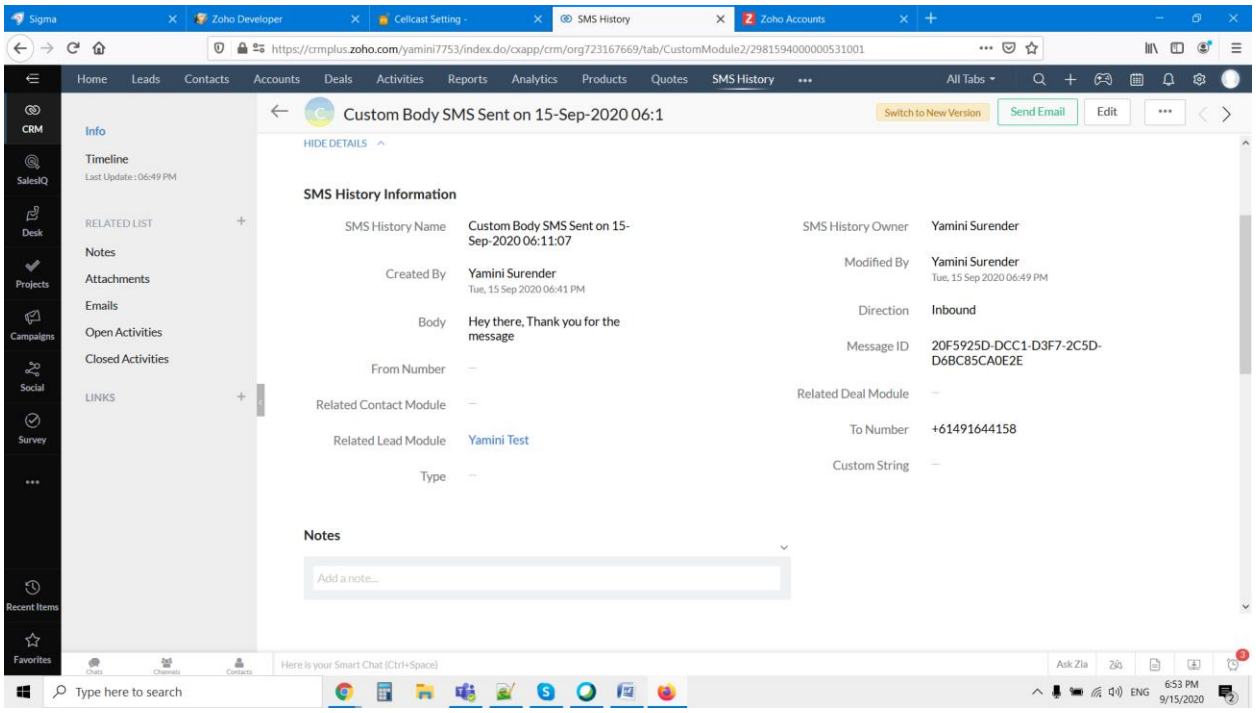




Incoming SMS:

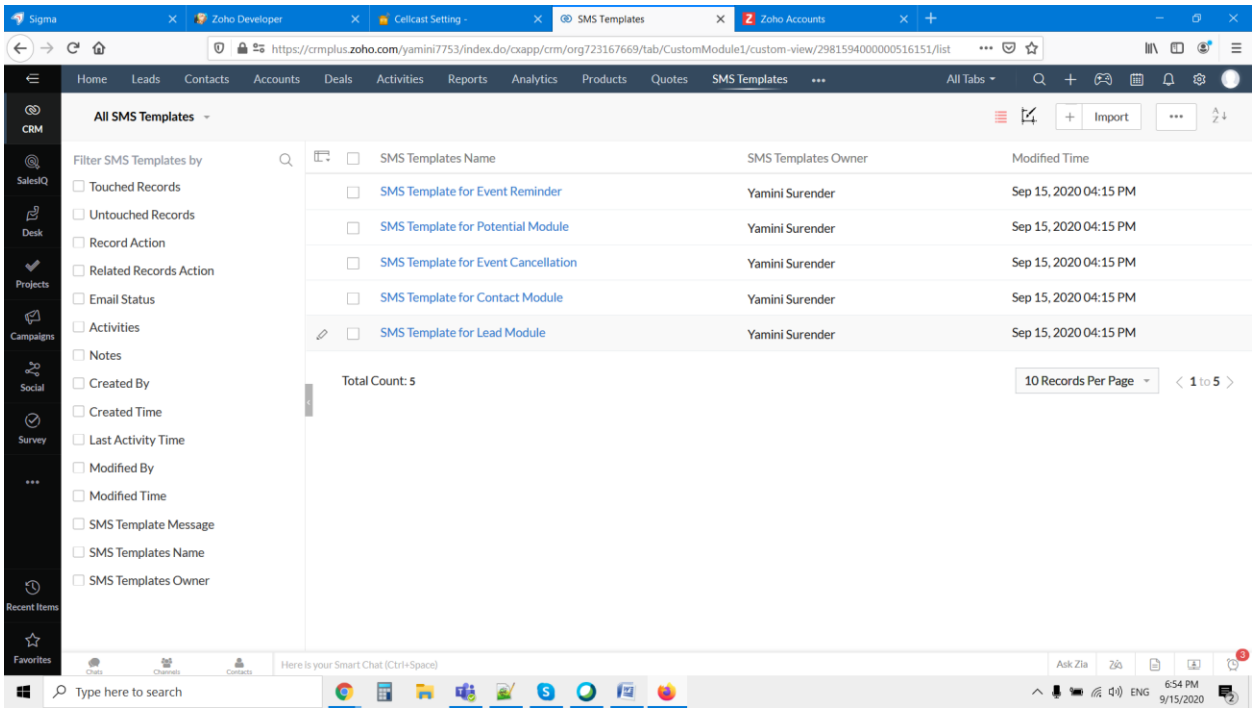
Whenever incoming SMS is received in Cellcast, SMS history will hold the incoming SMS with incoming body message and received time as well.





SMS Templates:

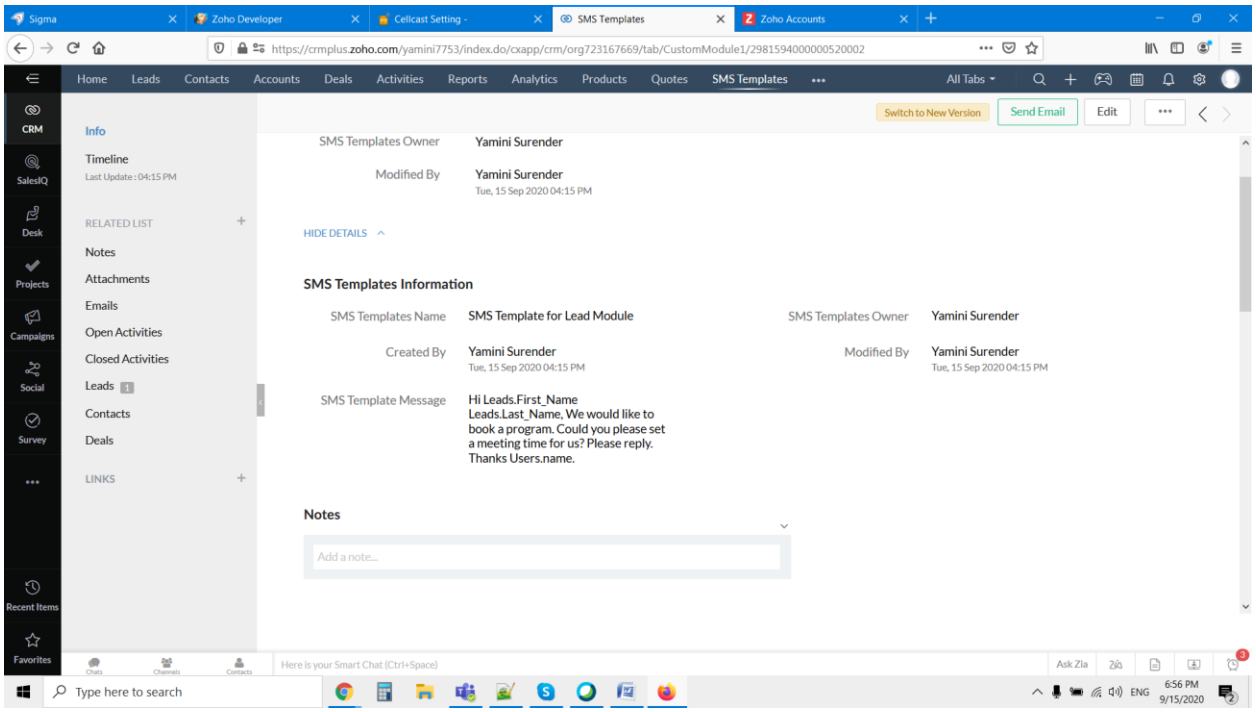
On installation of Cellcast Plugin, default templates will be added with default body. User can change the body content any time.



In the body, user can change any API name accordingly like as follows:

ModuleName.APIName

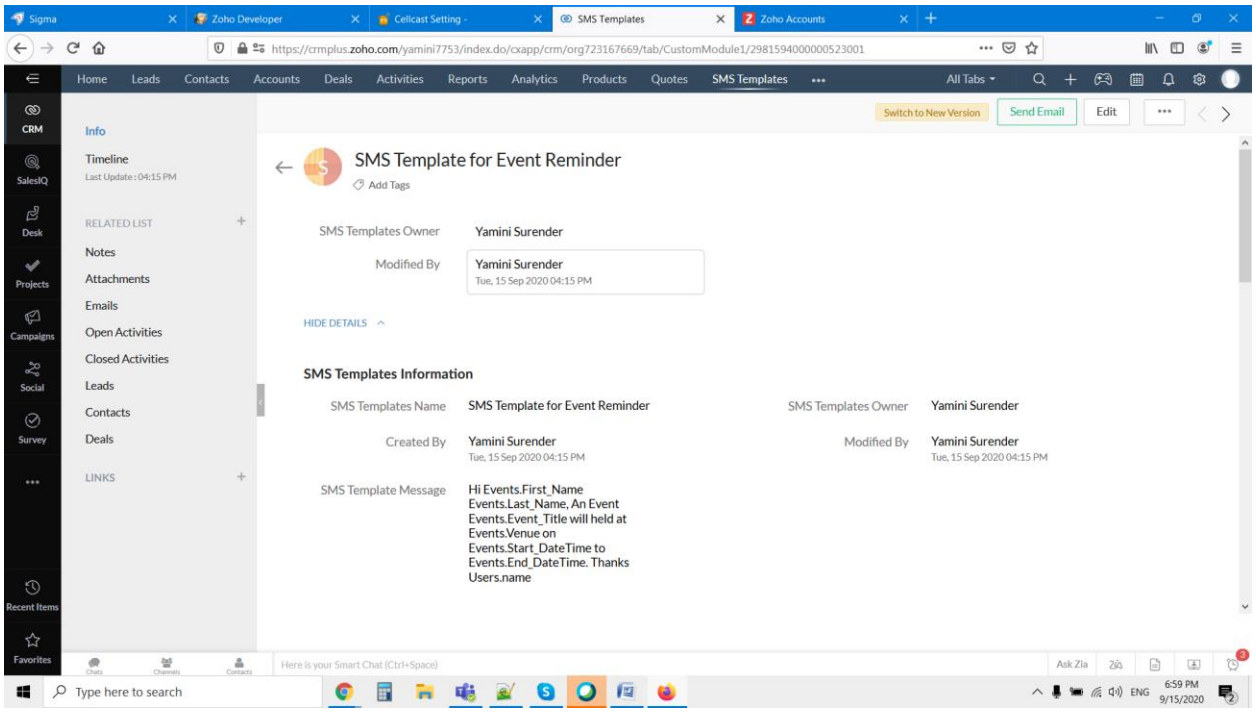
Example: Leads.First_Name



This template will be taken care in all updated template lookup of Lead, Contact and Deal module.

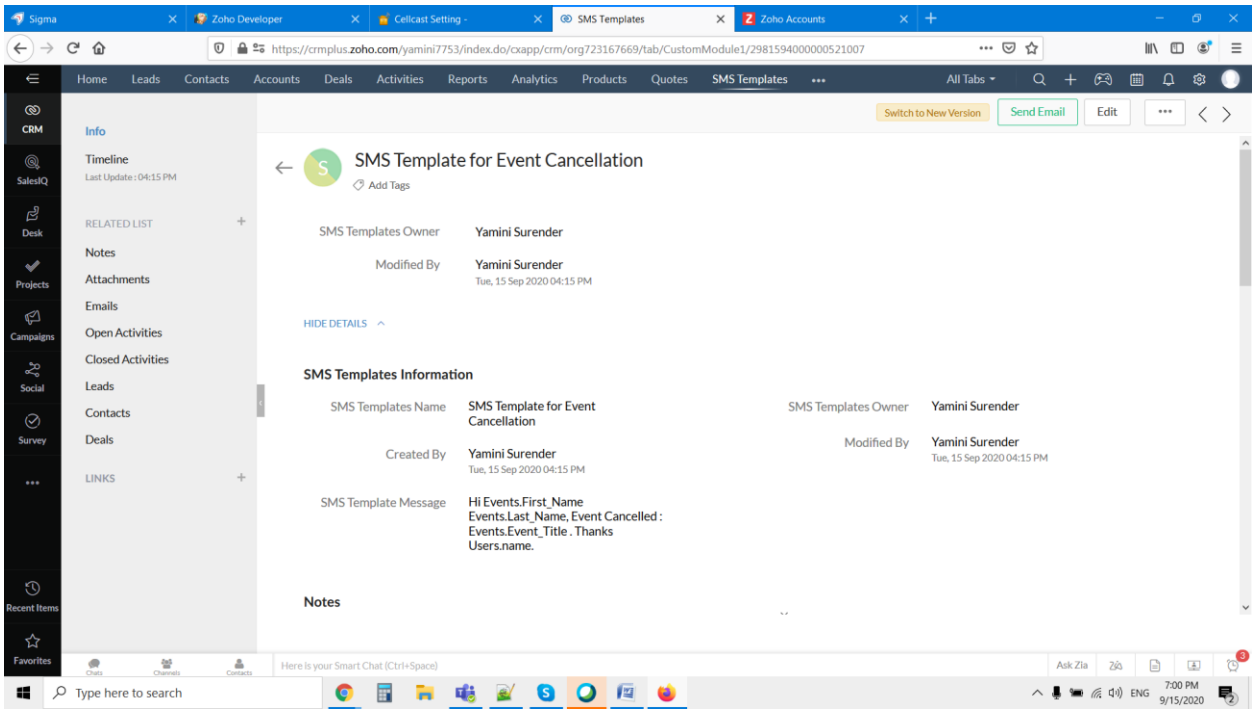
Event Creation SMS:

Once event is created, Event creation SMS will be sent to related lead/related contact module and template will be taken from SMS Template – Event Reminder Template



Event Cancellation SMS:

Once event is deleted, Event cancellation SMS will be sent to related lead/related contact module and template will be taken from SMS Template – Event Cancellation Template.



You can send SMS using a Custom Workflow function:

```
recordId = "123456";
module = "Contacts";
contact = zoho.crm.getRecordById(module,recordId);
custom_string = module + "-" + recordId ;
phone = contact.get("Phone").replaceAll("[^\d\+]","");
//
getTemp = contact.get("cellcastsms__SMS_Template_LookUp");
getTempID = contact.get("id");
getTempRec = zoho.crm.getRecordById("cellcastsms__SMS_Templates",getTempID);
message = getTempRec.get("cellcastsms__SMS_Template_Message");
//
convertMob = getMob.toJSONList();
createMap = Map();
createMap.put("sms_text",mess);
createMap.put("numbers",convertMob);
createMap.put("custom_string","Lead - " + LID);
headerMap = Map();
getApp = zoho.crm.getRecords("cellcastsms__Cellcast_Setting");
convertMap = getApp.toMap();
getAppID = convertMap.get("cellcastsms__APP_Key_ID");
headerMap.put("APPKEY",getAppID);
headerMap.put("Content-Type","application/json");
headerMap.put("Accept","application/json");
sendTextMessage = invokeurl
```

```
[
        url :"https://cellcast.com.au/api/v3/send-sms"
        type :POST
        parameters:createMap.toString()
        headers:headerMap
];
info sendTextMessage;
```

Incoming SMS Message:

Please find the below production URL for posting the data in Zoho CRM SMS History:

POST URL: (Cellcast SMS Webhook URL)

https://platform.zoho.com/crm/v2/functions/cellcastsms__authkey/actions/execute?auth_type=apikey&zapikey=<zapikey>

```
{
'from' => "+614NNNNNNN",
'body' => "---Body of incoming message ---",
'received_at' => "2020-09-14 12:03:31",
'message_id' => "ID",
'custom_string' => "custom_string"
}
```