

BagAChat Extension: Zoho CRM-WhatsApp Integration (for two-way Chatting)

Using the BagAChat integration, **Whatsapp messages can be sent and received from Zoho CRM to your leads and Contacts**. All your chats are backed up in Zoho CRM.

Notes:

- 1) This Extension is available only for Zoho CRM **Enterprise, Zoho ONE & Zoho CRMPlus** subscription plans
- 2) Readymade **Whatsapp-ZohoDesk** two-way WhatsApp messaging integration is also offered by BagAChat. Drop an email to info@bagachat.com for more details.
- 3) Spamming/Marketing messages are not supported on Whatsapp & it can result in your number being blocked by whatsapp. *Use this integration only for sending transactional or informative messages.*

Let's Get Started with Setup!

Contents

1) Create BagAChat Account:.....	2
2) Configure Zoho CRM:.....	2
a) Refer Videos Install BagAChat extension in Zoho CRM:.....	2
b) Install BagAChat extension in Zoho CRM:.....	2
c) Authorize Extension:.....	4
3) How to Use Whatsapp-Zoho CRM Integration:.....	7
a) Send/Receive messages with Individuals:	7
b) Send common message to multiple leads/contacts:	8
c) Automation: Take action based on Lead/Contact's responses on Whatsapp.....	9
Connect Multiple Whatsapp Numbers to your Zoho CRM Account:	9
1) Add 2nd number to the extension setting:.....	9
2) Update Special Custom Field:	10

1) Create BagAChat Account:

BagAChat account needs to be activated first to enable Whatsapp integration. Steps are provided separately in [BagAChat Account Activation-Chrome Extension.pdf](#) document (refer document here: <https://drive.google.com/drive/u/1/folders/1ypc23APkfr4IZSQeV76ldVOgQ7pMQa4s>).

Once the account is activated with your Business Whatsapp number, you can start configuring your Zoho CRM account.

2) Configure Zoho CRM:

If not already logged in, sign in to your Zoho CRM account which you want to connect with WhatsApp.

Click on

<https://crm.zoho.com/market/installPrivatePlugin.do?portalName=bagachatinfo&nameSpace=bagachatcrmext&versionIndex=3690541000000483002> →Install

(also present at <https://marketplace.zoho.com/app/crm/bagachat-for-zoho-crm>).

a) Refer Videos Install BagAChat extension in Zoho CRM:

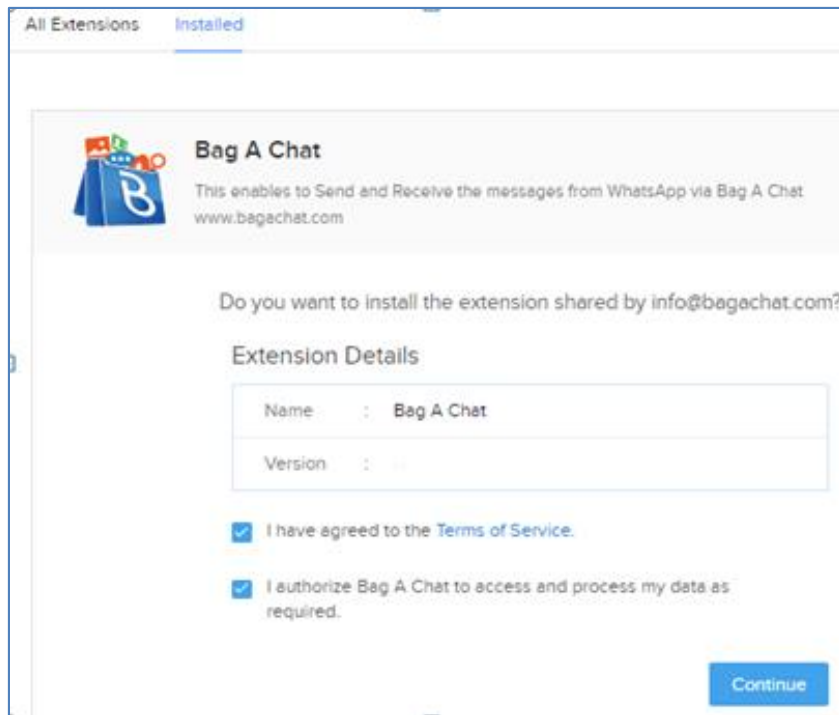
Setup Instructions video: <https://youtu.be/3NfVrKwbXj4>

How to Use video: <https://www.youtube.com/watch?v=cCA7p1JQGyw>

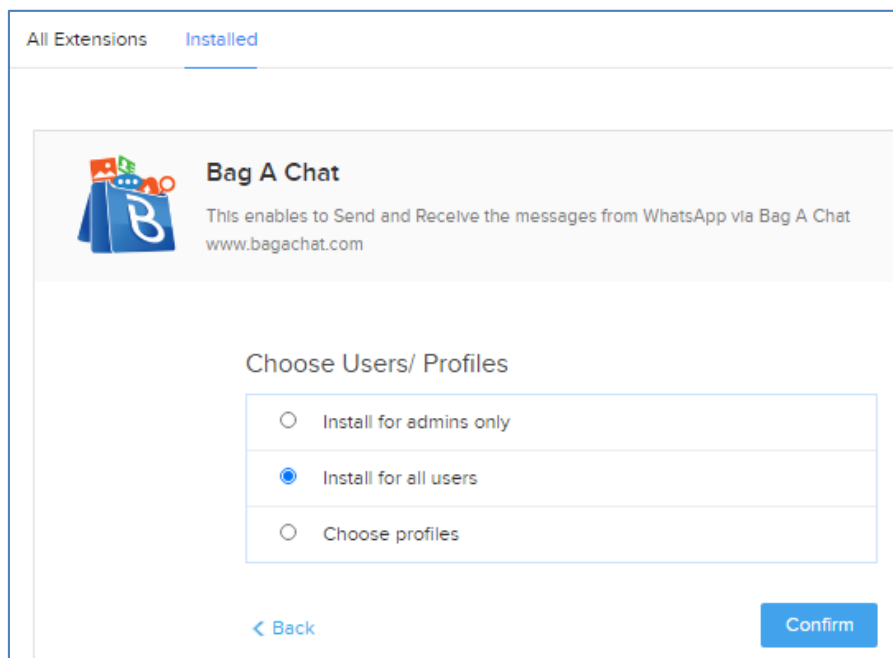
The same instructions & usage is also explained below, step by step (you can refer **ONLY** if more clarification needed apart from the above videos).

b) Install BagAChat extension in Zoho CRM:

Enable the checkboxes and click on **Continue**.

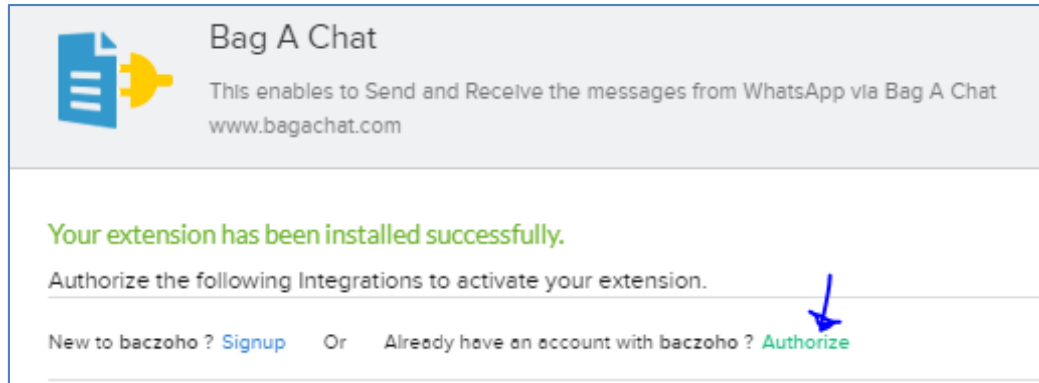


Select **install for all users** and click on **Confirm**.



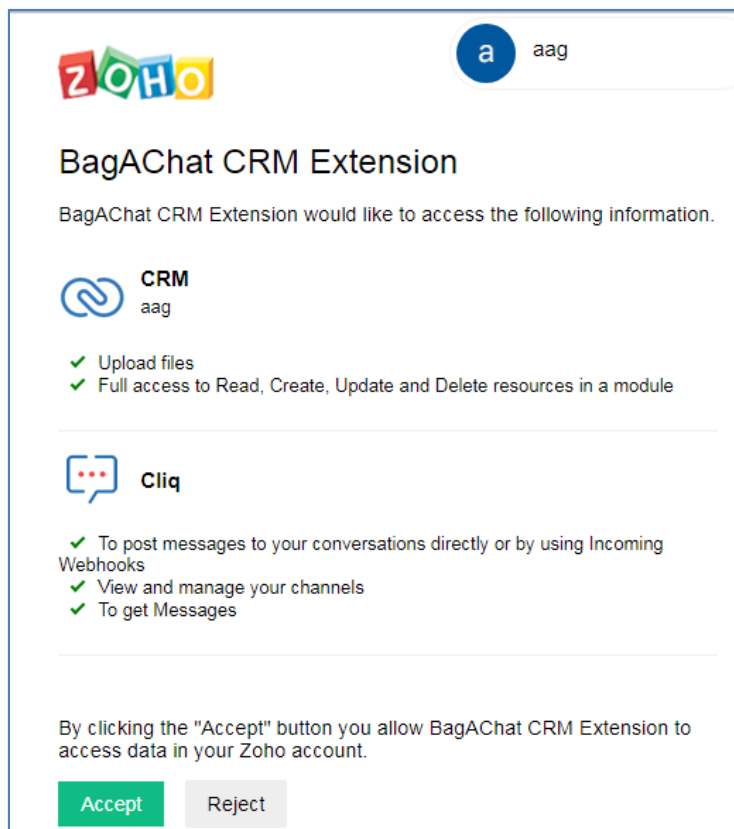
c) Authorize Extension:

For connecting your BagAChat account with Zoho CRM account, click on “Authorize” button.



The screenshot shows the Bag A Chat extension interface. At the top, there is a logo for Bag A Chat and the text: "Bag A Chat This enables to Send and Receive the messages from WhatsApp via Bag A Chat www.bagachat.com". Below this, a green message states: "Your extension has been installed successfully." Underneath, it says: "Authorize the following Integrations to activate your extension." At the bottom, there are two links: "New to baczooh ? [Signup](#)" and "Or Already have an account with baczooh ? [Authorize](#)". A blue arrow points to the "Authorize" link.

Click on **Accept**.




The screenshot shows the Zoho CRM extension authorization screen. At the top left is the Zoho logo, and at the top right is a user profile icon with the letter 'a' and the name 'aag'. The main heading is "BagAChat CRM Extension". Below this, it says: "BagAChat CRM Extension would like to access the following information." There are two sections of permissions:

- CRM** (aag):
 - ✓ Upload files
 - ✓ Full access to Read, Create, Update and Delete resources in a module
- Cliq**:
 - ✓ To post messages to your conversations directly or by using Incoming Webhooks
 - ✓ View and manage your channels
 - ✓ To get Messages

At the bottom, there is a disclaimer: "By clicking the 'Accept' button you allow BagAChat CRM Extension to access data in your Zoho account." Below this are two buttons: "Accept" (green) and "Reject" (grey).

Click on “**Next**” button to proceed.



Bag A Chat

This enables to Send and Receive the messages from WhatsApp via Bag A Chat
www.bagachat.com

Your extension has been installed successfully.

Authorize the following Integrations to activate your extension.

[Revoke](#) access to baczoho data.

Populate the Account specific details in the “**Settings**” Form:

All Extensions
Installed
Updates

← Extension Details

Settings
Uninstall

Name	BagAChat Whatsapp extension for Zoho CRM
Version	38.0

Click on “**Add New WA PhoneNumber**” button and populate the details as explained below:

← BagAChat Whatsapp extension for Zoho CRM - Settings

**This extension needs Bag A Chat (<http://www.bagachat.com>) account.
Please contact info@bagachat.com for account creation, if not done already.**

ZOHO CRM Domain

Select Domain

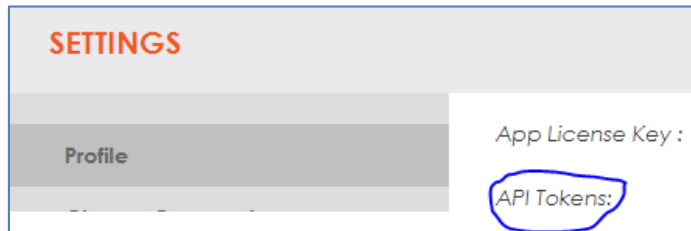
Bag A Chat Linked WhatsApp Number Details

+ Add New WA PhoneNumber

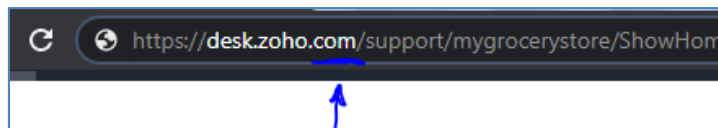
Phone Number	API Token	Country Code	Actions

Save

API Token : Once you activate BagAChat account, the value of **BagAChat API Token** is available as 'APITokens' value in Settings→Profile menu in BagAChat web-portal (<https://link.bagachat.com>). Your login to this portal is your registered email id & password is sent on the same email id.



Zoho CRM Domain: The domain name is found in the URL of your desk account. It can have value like **com, eu, au, in** etc.



Phone Number: Your Whatsapp Number registered with BagAChat

Country Code: Put the value of your country code **without +sign** (e.g. 44 for UK). If contact mobile number is in local format, this default code will be added to it. Refer to <https://countrycode.org> for Country Code.

All the above 4 parameters are mandatory for the integration to be successful.

(Note: If you have more than 1 Whatsapp Numbers registered with BagAChat, you can connect all those numbers also to same Zoho CRM Account. Use “**Add New WA PhoneNumber**” button to details of the additional numbers)

Save the details.

That's it! Your Extension is successfully setup.

Please see the next pages, to understand **how to use the extension...**

3) How to Use Whatsapp-Zoho CRM Integration:

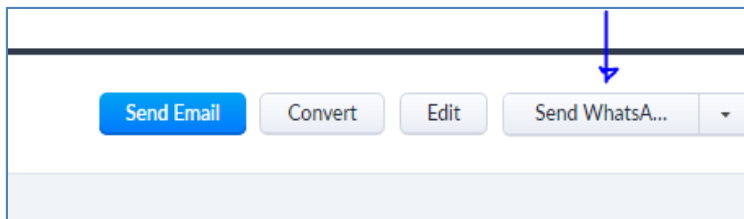
a) Send/Receive messages with Individuals:

Whatsapp messages can be sent to those Leads or Contacts for whom the Mobile number is populated in the **Mobile** field.

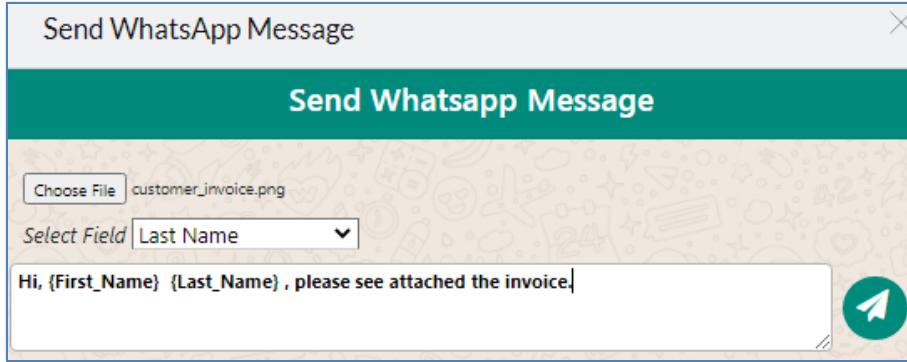
Note:

- If Mobile number is in international format, it should have a **+sign** in front of it.
- Else number should be in local format (default ISD Code mentioned above, will be added to it)
- Mobile number must **not have any spaces** in between its digits.

Open a lead/contact page. Click **Send Whatsapp** button on top right corner to send message



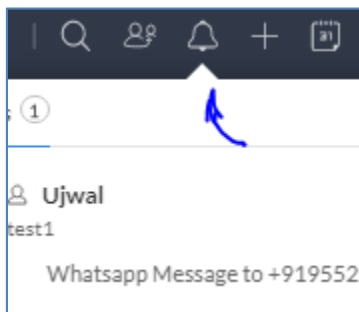
Text as well as attachments (images, PDF files etc.) can be sent to contacts on WhatsApp. By using "Select Field" dropdown, personalized messages can also be sent.



Incoming /outgoing messages are visible (in chronological order) at the bottom of the corresponding Lead/contact’s page, along with the Zoho Agent who sent the response.

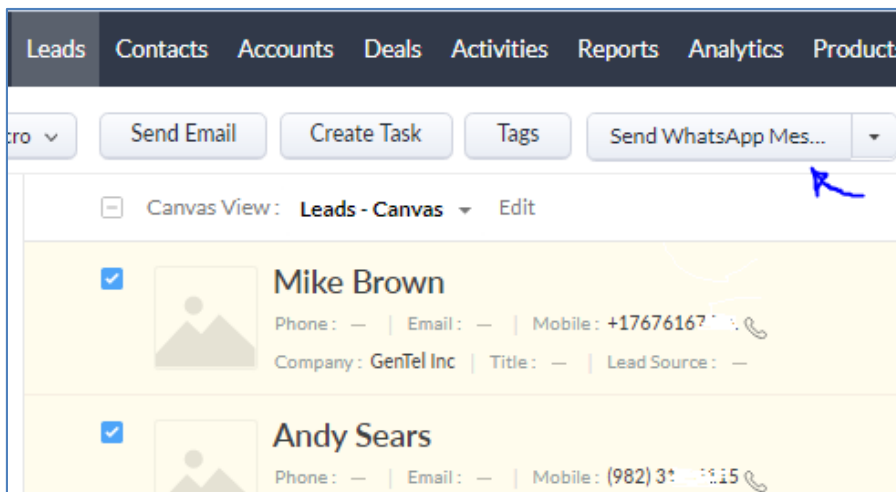
WhatsApp Messages						
Direction	Message	Attachment	Media Type	Time	Status	Agent
Outgoing	sure sir, regarding which service you need help?			2021-05-30T05:24:24+05:30	DELIVERED	aag hike
Incoming	Hello, I need some help regarding your services.			2021-05-30T05:21:13+05:30	Received	aag hike

Notifications for all the incoming messages are also visible. It allows a quick way to access the chats.



b) Send common message to multiple leads/contacts:

Go to Leads/Contacts Module. Select contacts. The “Send Whatsapp” button appears to send a common message to selected contacts.



The sent messages are visible in the respective Lead/Contact's page.

Note: Maximum 20 messages can be sent in one batch/minute.

c) Automation: Take action based on Lead/Contact's responses on Whatsapp

You can easily trigger some automated actions in Zoho CRM, based on the whatsapp messages received from your lead/contact. E.g.

- Subscribing the lead for a service when he/she sends a "#SUBSCRIBE" message
- Stopping emails to them when they send a "STOP" message
- Sending more information to them when they send any response on Whatsapp

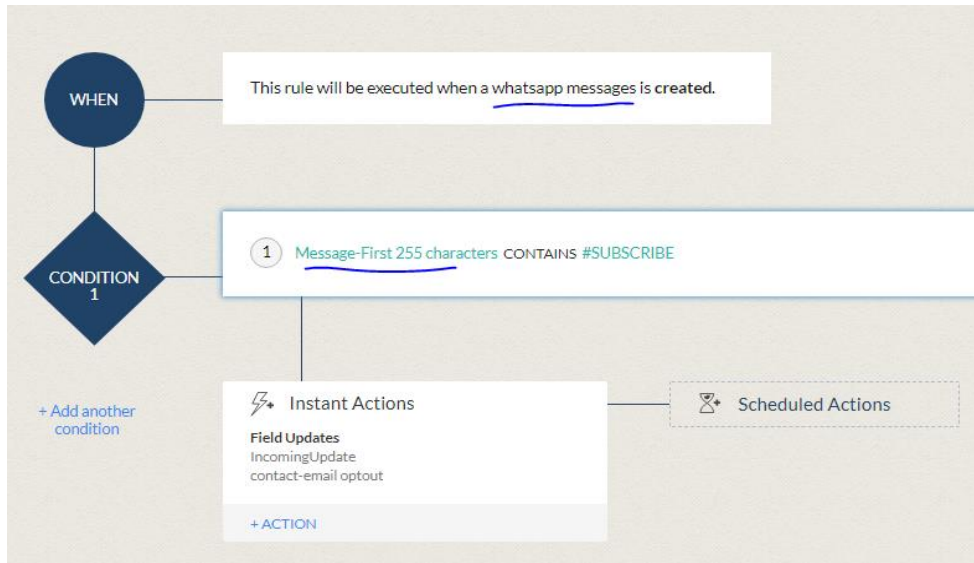
All you need to do is setup a workflow rule with the below details:

When → "Whatsapp messages" is created

Condition → "Message-First 255 Characters" matches with whatsapp response.

Action → choose any one like **Field Update**, **Webhook** etc.

Example of automation based on incoming message:



Connect Multiple Whatsapp Numbers to your Zoho CRM Account:

You may want to send/receive messages from more than one Whatsapp number of your organization. BagAChat support the same.

1) Add 2nd number to the extension setting:

Go to Settings → MarketPlace → All → Installed → BagaChat Whatsapp extension for Zoho CRM → Settings





← BagAChat Whatsapp extension for Zoho CRM - Settings

This extension needs Bag A Chat (<http://www.bagachat.com>) account.
Please contact info@bagachat.com for account creation, if not done already.

ZOHO CRM Domain

India (.in)

Bag A Chat Linked WhatsApp Number Details + Add New WA PhoneNumber

Phone Number	API Token	Country Code	Actions
+91956898468	M87620JVN	India (+91)	 
+91943510014	KU87620FVZ	India (+91)	 

Save

Save the additional number details.

2) Send Message from any particular whatsapp number:

When you install the BagAChat extension, a custom field **"BagAChat Linked WA Number"** gets added to the Lead/Contact page. **This field is important ONLY IF you are have multiple BagAChat accounts (Whatsapp numbers) connected to your Zoho CRM account.**

You can edit this field as per from which phone number you want to send the message out to Lead/Contact. This number must to be registered with BagAChat first.

No. of Employees —

Rating —

Created By aag hike
Sat, 22 May 2021 05:04 PM

Skype ID —

Twitter —

Secondary Email

BagAChat Linked WA Number

In the example given above, the reply/outgoing messages to this lead/contact will be sent from +91943510014.

Whatsapp-Zoho CRM integration workflow Supported:

- The first Whatsapp message from a new customer (whose phone number is not present in Zoho CRM in Lead/Contact module) creates a new Lead with phone number as unique identifier.
- Any follow-up messages from same customer get added to this Lead in a '**WhatsApp Messages**' related list (visible on same page)
- On this Lead, all existing Zoho CRM manual/automation scenarios are applicable
- When any User clicks on the '**Send Whatsapp message**' in that lead/contact page, A form opens up to send whatsapp message & file (if any).
- The reply is also saved in '**WhatsApp Messages**' related list.
- Even if the lead is converted to Contact, the following whatsapp communication gets stored in the same Contact.
- The BagAChat registered phone number, on which a customer message was received, is saved in "**BagAChat Linked WANumber**" field.