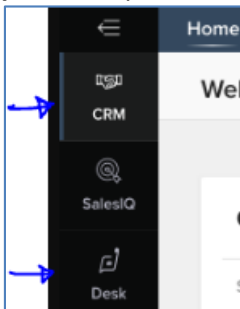


BagAChat: WhatsApp –Zoho CRM Integration

Using the BagAChat integration, **automated messages can be sent from Zoho CRM to Whatsapp contacts.**

Notes:

- 1) Same steps are also applicable for integration with **Zoho Invoice & Books** with Whatsapp, if needed.
- 2) Readymade **Whatsapp-ZohoDesk** two-way WhatsApp messaging integration is also offered by BagAChat. Zoho CRM & ZohoDesk are bundled together in **Zoho One & Zoho CRMPlus subscription plans**. 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.*
- 4) It is **recommended** to use **Whatsapp Business app** (<https://www.whatsapp.com/business>) instead of **Whatsapp Personal app**, while using Automated messaging.

Let's Get Started with Setup!

1) Create BagAChat Account:

BagAChat account needs to be activated first to enable Whatsapp integration. Download and follow the Steps are provided in <https://link.bagachat.com/pdfs/BagAChat%20Account%20Activation-Cloud-WebWhatsApp.pdf> document.

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

2) Configure Zoho CRM:

There are two ways to configure WhatsApp integration.

- a) Create a webhook (available in [Zoho CRM Professional plan or above / Zoho One / Zoho CRM Plus](#))
- b) Write a Custom Function for more advanced automation (available in [Zoho Standard and above / Zoho One / Zoho CRM Plus](#))

Setup Video: <https://www.youtube.com/watch?v=CSoqJtZfwoE>

Refer to the steps below:

a) Create Webhook in Zoho CRM:

You can create webhook to send messages on Whatsapp. This webhook can be added in your workflow rules. Using webhook, **only text messages (or public files) can be sent**. Attachment/Media internal to Zoho CRM is supported only via custom functions (refer section 2.c below)

- Go to Settings→Automation→Actions→Webhooks→Configure Webhook

In the Webhook creation page, you need to start populating the below values.

URL to Notify: <https://push.bagachat.com/api/sendtransactionalmsg.bg>
Method: POST

Note: The allowed rate of calling Webhooks is limited to **20 calls per minute**. If the calling rate exceeds beyond this limit, HTTP Status code 429 (TOO_MANY_REQUESTS) will be returned and your messages delivery will fail. You need to throttle Webhook calls accordingly.

Under **Body**→ **Type “Form-Data”**:

Module Parameters: [Standard Format](#) → [Add Parameter](#)
Parameter Name: **conversationname** Parameter value **Mobile**.
Parameter Type: **Leads**

Here, the ‘**conversationname**’ value is the mobile number of the contact (supported in local as well as international format).

Custom Parameters: [Add Parameter \(use + icon\)](#)

auth [BagAChat API Token](#) (see explanation below)
content-type [application/json](#)
countrycode [CountryCode](#) (see explanation below)

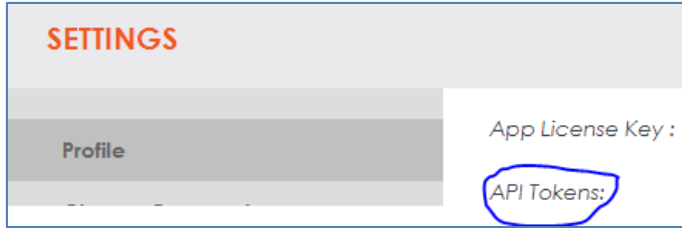
Optional parameters (only for sending attachments):

medianame [File name with extension](#) (see explanation below)
mediaurl [Public url of file](#) (see explanation below)

User Defined Format:

Parameter Name: **message** **Parameter Value:** **Your_text_Template_to_be_sent_to_contact**

[BagAChat 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://push.bagachat.com>). Your login to this portal is your registered email id & password is sent on the same email id.



countrycode: Put the value of your country code with + sign (e.g. +44 for UK).

mediaurl: public url of the file for BagAChat to retrieve the file.

medianame: name of the file with the file extension.

e.g. if you have an image <https://filebin.net/ytkusddpslryhgwk/messi.jpg?t=lk7ogeyh> then set
“**mediaurl**”: “<https://filebin.net/ytkusddpslryhgwk/messi.jpg?t=lk7ogeyh>” and “**medianame**”:
“**messi.jpg**”

(If you don't have a public domain to save attachments, then <https://filebin.net> is a good free site to host your attachments in public domain)

Notes for sending Attachments:

- **The file internal to Zoho CRM cannot be sent via webhook.** For that, a custom function needs to be developed.
- If a file is to be sent, then only **mediurl** & **medianame** fields need to added. Else these fields are not needed.

Sample values are shown in below screenshot, for BagAChat account with **BagAChat API Token** value MHMJ7U10HVNP & **Country Code** value as +91 (for country India)

Parameter Name	Parameter Value
auth	XZ3YFFEHVPO
Content-type	application/json
countrycode	+91

Sample values for sending a file present on public url:

Parameter Name	Parameter Value
auth	XZ3YFFEHVPO
Content-type	application/json
countrycode	+91
medianame	rViljVP.png
mediaurl	https://i.imgur.com/rViljVP.png

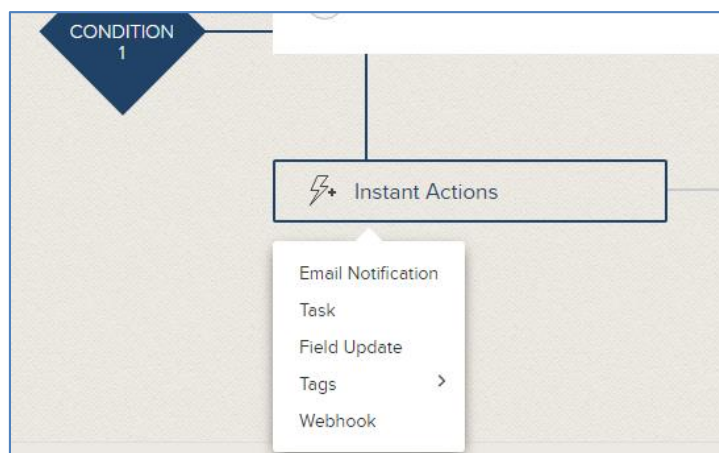
Important Note: For every type of template message to be sent, a **separate webhook** is needed.

Reference: <https://www.zoho.com/developer/help/extensions/automation/webhooks.html>

b) Create Workflow Rule in Zoho CRM:

Workflow Rule is created to trigger alerts based on updates in Zoho CRM. On each rule, you can attach Webhook to send WhatsApp message.

- Go to Settings → Automation → Workflow Rules → Add Rule
- During the Workflow rule creation, in the **Instant Actions**, select **Webhook**. Select the BagAChat Webhook that was created. Save the Workflow rule.



More help of Workflow Rules:

<https://help.zoho.com/portal/en/kb/crm/automate-business-processes/workflow-management/articles/configuring-workflow-rules#Part 1 - Enter the basic details of the rule>

Please refer to some **examples** in below pages to understand the configuration better.

Example Automation Workflows in ZOHO CRM

Please refer to examples below for setting up your webhook. Webhook can fetch information from any CRM module like leads/Contacts etc.

Example 1: Send a **personalized** text message

Below screenshot shows webhook configuration where a **personalized** text message “**Hello Firstname Lastname, Thank you for contacting our organization**’ will be sent to phone number present in **Mobile** field of the **Lead** Module. Zoho CRM’s dynamic fields **Leads.First Name** & **Leads.Last Name** are used as an example.

Name	<input type="text" value="Whatsapp Integration"/>
Description	<input type="text"/>
Method	<input type="text" value="POST"/>
URL to Notify	<input type="text" value="https://push.bagachat.com/api/sendtransactionalmsg.bg"/>
Authorization Type	<input checked="" type="radio"/> General ⓘ <input type="radio"/> Connection ⓘ
Module	<input type="text" value="Leads"/>

Header

Module Parameters

[Add parameter](#)

Custom Parameters

[Add parameter](#)

Body

Type Form-Data

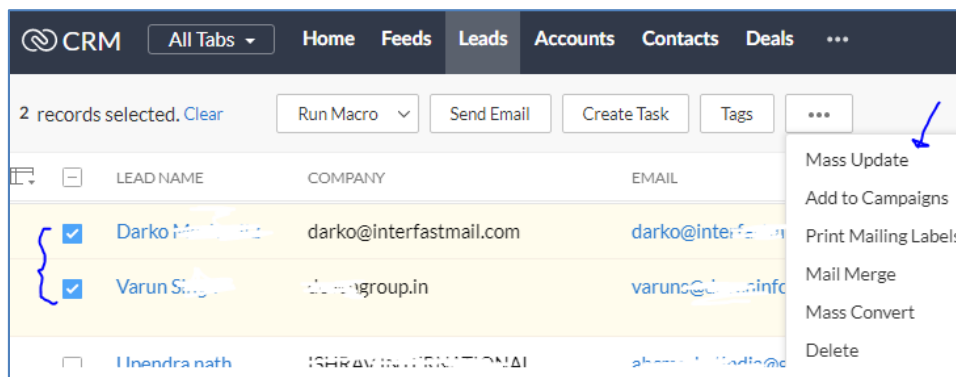
Module Parameters		
Parameter Name	Parameter Type	Parameter Value
ConversationName	Leads	Mobile

Custom Parameters	
Parameter Name	Parameter Value
Auth	KZYK45UI
content-Type	application/json
CountryCode	+91

User defined Format	
Parameter Name	Parameter Value
Message	Hi, \${Leads.First Name} \${Leads.Last Name}, thank you for contacting our organization.

Example 2: Send Bulk/Campaign Whatsapp Message to Contacts

Configure the Webhook as per example #2 above. Select multiple contacts as shown below → Mass Update. Select the field which corresponds to the “message” field in webhook & put value as the Whatsapp Message to sent → Update.



c) Create Custom Function in Zoho CRM:

Custom Functions can be used for in 2 cases:

- 1) Sending files internal to Zoho CRM e.g. invoices, proposals etc.
- 2) More advanced personalization of messages or business logic which can't be achieved by webhook

Refer to the below section to see how Custom Function can be added in Zoho CRM :

<https://www.zoho.com/crm/help/automation/custom-functions.html>

Maximum 40 calls to custom functions are allowed in a minute.

A sample custom function code is provided below, which sends a personalized message ("Hello FirstName LastName , Thanks for visiting our Website!) to a CRM Lead.

// Get the Lead information from CRM

```
leadIdLong = input.leadId.toLong();
leadDetails = zoho.crm.getRecordById("Leads", leadIdLong);
first = ifnull(leadDetails.get("First Name"), "");
last = ifnull(leadDetails.get("Last Name"), "");
name = first + " " + last;
```

// Get the Lead mobile number from CRM (in international format e.g.+919999999999)

```
mobile = ifnull(leadDetails.get("Mobile"), "");
message = "Some Message"; // "Hello " + name + ", Thanks for visiting our Website!";
```

//Once you activate BagAChat account, the APITOKEN is available as 'APITokens' value // in profile page on BagAChat web-portal.

```
apiToken = "APITOKEN";
baseEncoded = zoho.encryption.base64Encode(apiToken + ":A");
header = {"Authorization":"Basic " + baseEncoded, "Content-Type":"application/json"};
```

//Here, the 'conversationname' value is the phone number of the contact with the country // code -without any space in between (e.g. if +91 is country code & 8888888888 is the // phone number of contact then "conversationname":"+918888888888" to set in JSON)

```
postBody = '{"conversationname':" + mobile + "', 'message':" + message + "'}";
postBody = Map();
postBody.put("conversationname", mobile);
postBody.put("message", message.toString());
str = postUrl("https://push.bagachat.com/api/sendtransactionalmsg.bg", postBody, header, true);
```