

WhatsApp - ZohoDesk Integration Help

Using the BagAChat integration capability, Whatsapp can be connected to your Zohodesk account for two way interaction with Whatsapp contacts/leads via Zohodesk. **Zohodesk Standard** subscription plan and above is compatible with this solution.

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 ZohoDesk account.

Configure BagAChat Account:

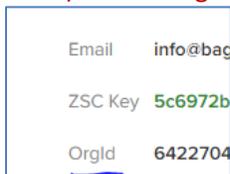
BagAChat forwards whatsapp messages (text/attachments) received from contacts to ZohoDesk in real-time. Whenever a message is received (text or attachment), it is forwarded to ZohoDesk.

The below 4 fields are needed to Integrate BagAChat BagAChat with your Zoho Desk account. Please note these in a notepad for filling in the Authorization form later.

- 1) **Bag a Chat API Token:** API Token of your BagAChat account. To get it, Login to your BagAChat account (<https://link.bagachat.com>) go to Settings Menu → Profile → API Token.

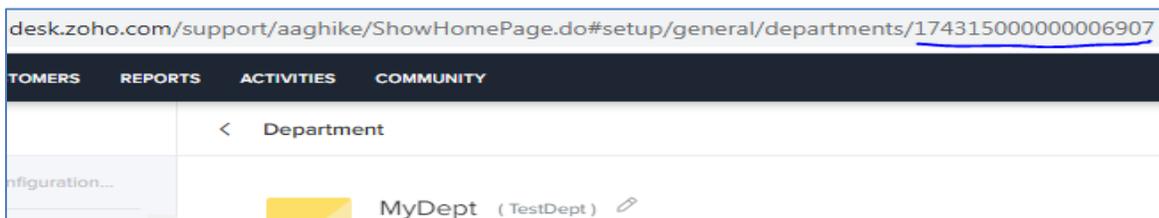
ZohoDesk fields: Login to your Zohodesk Account to get Zoho specific fields.

- 2) **Zoho Org ID:** On the same API page, **OrgId** is available at the bottom of the page.



- 3) **Zoho Desk Department ID:** Go to Settings → General → Departments → Click on the Department Name.

Copy the number in URL (see screenshot below). This is your Department ID.



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



Login to your BagAChat account (<https://link.bagachat.com>)

Go to **Settings**→**Integrations**. Here the Zoho Desk parameters need to be populated.

| | |
|-------------------------|----------------------|
| Bag A Chat API Token | <input type="text"/> |
| Zoho Desk Department Id | <input type="text"/> |
| Zoho Desk Org Id | <input type="text"/> |
| Zoho Desk Domain | <input type="text"/> |

Authorize ZOHO account

Once the configuration is done in BagAChat Dashboard, click on **Authorize ZOHO Account** button. It opens us a Zoho form as a popup as shown below. Click on **Accept** button. (Note: To get the form, the popup needs to be enabled).

If you are already logged in the ZohoDesk account on the same PC/laptop, then the below popup comes up. Else a prompt will ask you to login.



Bag A Chat and Desk

Bag A Chat and Desk would like to access the following information.

 **Zoho Desk**
bactest

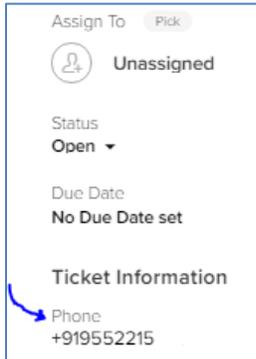
- ✓ Search across data in your desk account.
- ✓ Read/Write contacts, accounts and their sub resources
- ✓ Full access to desk events
- ✓ Read/Write tickets and its sub resources

By clicking the "Accept" button you allow Bag A Chat and Desk to access account.

Accept **Reject**

It should give a Success message. This indicates your configuration in BagAChat dashboard is complete.

Test: Send a few messages on your WhatsApp number (registered with BagAChat) and see if those messages are visible in your ZohoDesk account in a new ticket. Also, check that the **Phone** field of that ticket has the Whatsapp number of the contact (In international format). **Please never edit this field.**



Configuring ZohoDesk to Send Responses to WhatsApp:

1) Create a webhook. Go to **Settings (Gear Icon) → Developer Space → Webhooks → New Webhook**

Please refer to the details below carefully.

URL to Notify: Put the below URL.

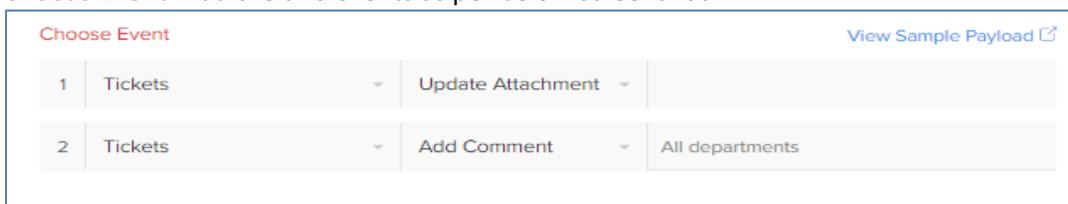
<https://bac-zoho-oauth-integrator.herokuapp.com/receiveMsgFromZoho?bacToken=BagAChatToken>

Replace **BagAChatToken** with the values obtained as explained on Page 1 of this document above.

Example: <https://bac-zoho-integrator.herokuapp.com/receiveMsgFromZoho?bacToken=ZHX78ERY>

Source ID: copy this value as is **36e13466-8487-11ea-bc55-0242ac130003**

Choose Event: Add the two events as per below screenshot



SAVE the webhook.

Sample Response Setting -ZohoDesk page:

< Edit Webhook

Name
Whatsapp-integration

URL to notify
<https://bac-zoho-integrator.herokuapp.com/receiveMsgF>

Description
send replies to Whatsapp Contacts

Source ID ⓘ
36e13466-8487-11ea-bc55-0242ac130003

Choose Event

| | | | |
|---|---------|-------------------|-----------------|
| 1 | Tickets | Update Attachment | |
| 2 | Tickets | Add Comment | All departments |

Whatsapp-ZohoDesk integration workflow:

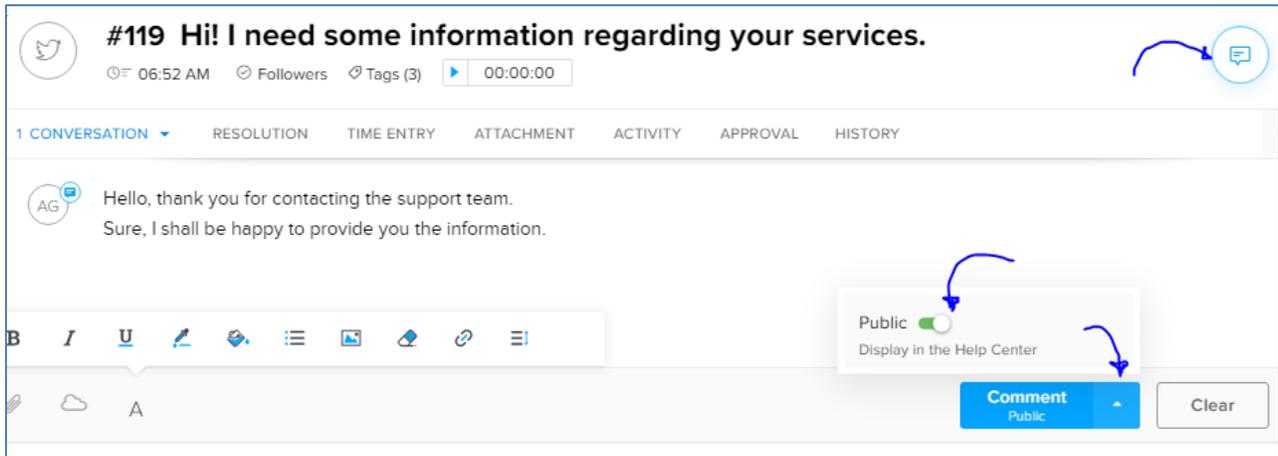
- The first Whatsapp message from a customer creates a new Ticket with 'Status' as 'Open'.
- If new customer, a customer record is created with phone number as unique identifier.
- Any follow-up messages from same customer get added to this Ticket as private comments.
- On this ticket, all existing ZohoDesk Ticket management scenarios are applicable (e.g. agent assignment/triggers/ticket field updates etc.).
- When any agent adds a 'public' comment to this ticket, that comment gets sent to that customer on Whatsapp.
- Once any agent changes 'Status' of this ticket to 'Closed', a new whatsapp message coming from same customer creates a new Ticket.
- Public comments added to the ticket are sent as Whatsapp messages to contacts.
- **Notes:**
 - This feature is applicable in ZohoDesk from **Standard** plan and above or with **Zoho One**.
 - **Maximum of 50 replies/ minute** can be sent on whatsapp (across all ZohoDesk users together). Beyond that the messages will need to be resent.

How to Send Replies from ZohoDesk Tickets to WhatsApp:

To enable chatting with customer via ZohoDesk, the Zohodesk user (agent) can add public comments in tickets. The replies are sent to the WhatsApp Number auto-populated in **Phone** field of the ticket.

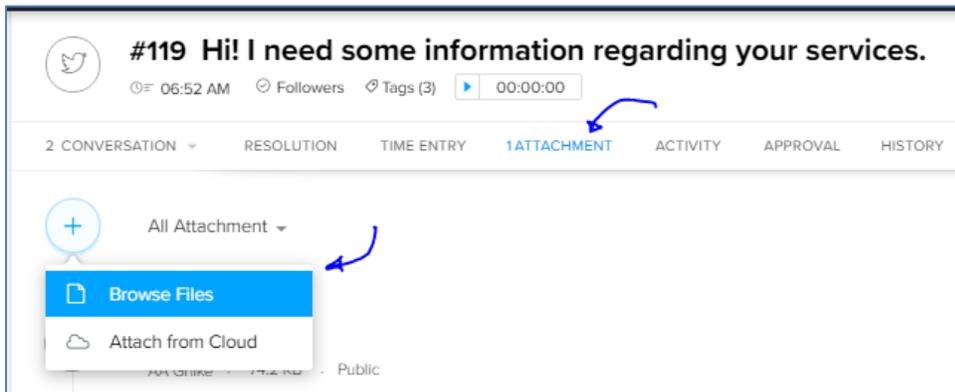
1) Send a text messages from a ticket:

Select **Add Comment** → Write the text message → Click arrow in **Comment** button → Enable **Public**



2) Send the Attachment/File from a ticket:

a) Go to **Attachment tab** → Click on **+** icon → Browse Files → Select File to be sent.



b) When this attachment added to the ticket as comment, select **Mark as Public**.

