

# SMS for Zoho Desk by Zoho Voice

SMS for Zoho Desk by Zoho Voice enables you to send and receive Short Messaging Service (SMS) messages to your domestic customers using voice and SMS-enabled local phone numbers, and expand your reach with multi-channel connectivity.

**Note:** Local two-way SMS service is only available in the USA and Canada. International outbound SMS service is available in 100+ countries.

# **Prerequisites for using this extension**

- A valid Zoho Desk plan supporting this extension
- A valid Zoho Voice account and plan supporting this extension
- Purchase of number in Zoho Voice
- For the **US** and **Canada** regions, **10DLC registration** must be completed for the purchased local number (mandatory to send and receive SMS/MMS)

# **Supported plans in Zoho Voice**

• All Zoho Voice plans except the SOLO plan support this SMS extension.

Note: For users on the SOLO plan, you must purchase a user add-on to use the extension.

# For Zoho Desk users with an active Zoho Voice

## account

- Install the SMS for Zoho Desk by Zoho Voice extension
- Send SMS/MMS in Zoho Desk using this extension

## Installing the SMS for Zoho Desk by Zoho Voice Extension

To start sending SMS/MMS messages directly from **Zoho Desk**, you need to install the **SMS for Zoho Desk by Zoho Voice** extension.

To install:

- 1. In your Zoho Desk account, navigate to Marketplace.
- 2. Search for SMS for Zoho Desk by Zoho Voice and click Install.



- 3. Review your profile details and make any changes if needed.
- 4. Confirm the installation by accepting the Terms of Service and Privacy Policy.
- 5. In general settings, select the **Departments** and **Profiles** whose agents should have access to this extension.
- 6. Agree to the **Terms of use** and click **Install**.

Q Search setup and configuration	< SMS for Zoho Desk by Zoho Voice
<ul> <li>Setup</li> <li>Schedules</li> <li>DATA ADMINISTRATION</li> <li>Sandbox</li> <li>Import History</li> </ul>	SMS for Zoho Desk by Zoho Voice Send and receive SMS directly from Zoho Desk and improve ticket resolution time
Data Backup Zwitch(Data Migration)	EXTENSION DETAILS GENERAL SETTINGS
Bulk Action Log + >	Azent Permissions
Recycle Bin	Select departments and profiles whose agents can access this extension.
INTEGRATIONS Marketplace	Departments
Zoho	DeptZ
Microsoft	Profiles - All Profiles
Others +	Support Administrator Newbie Agent Agent Supervisor
DEVELOPER SPACE	Support Manager
APIs >	
Connections	C I have read and agree to the Terms of Use
Functions	
Webhooks	
Mobile SDK	Install Cancel

## Send SMS/MMS using the extension in Zoho Desk

- 1. In your **Zoho Desk** account, navigate to **Customers** → **Contacts** module.
- 2. Select a contact from the list.
- 3. On the contact's detailed view page, click the **more menu** icon and select **Zoho Voice SMS Extension**.

H C Tickets	Kr	nowledge Base Contracts Custor	mers Analyti	cs Activities Co	nmunity Social Chat	IM All Departments •	+ • @ 🗗	8	© 🛞
<	8	Contact Properties	2	(+1)	-	🕼 Add Tick	ket 👂 🚥 😫		
	0	Contact Owner		OVERVIEW HISTOR	Y ACTIVITIES TICKETS	HAPPINESS RATING TIME ENTRY PROI	DUCTS =		
		Email Add Email	م 1	All Tickets	Open Tickets <b>1</b>	Overdue Ticket Overdue Ticket			
		Mobile Add Mobile Phone	Pe	nding Tickets		Zoho Voice SMS E	xtension		
П		Facebook Add Facebook		Outbound Una           #6532         . ©= 10 Ma	answered Call to (+131263566)	39) Open Desk - Support	= p 🐌		
		Twitter Add Twitter Zoho CRM Contact Type contacts	Tra	affic Analysis		Average Handling Time	Last 6 months		
		Contact Created Time 10 Mar 12:48 PM				First Response Time	00:00		
		Layout companypavi		Tickets	1 Phone (100%)	Response Time	00:00		
						Resolution Time	00:00		

4. On the conversation page, select the **Sender ID** from the list of **SMS enabled number(s)** you have.

<	8	Contact Properties	(1)
	0	Contact Owner	OVERVIEW HISTORY ACTIVITIES TICKETS HAPPINESS RATING ZOHO VOICE SMS EXTENSION -
		<b>V</b>	C Zoho Voice SMS Extension
		Email Add Email Mobile Add Mobile	O Search in current conversation Q
		Phone	
		Facebook Add Facebook Twitter	
		Add Twitter Zoho CRM Contact Type	0
		Contacts Contact Created Time 10 Mar 12:48 PM	
		Layout companypavi	Longcode Sales
			C Testing the sample content
			Sales V V Send C Send C

- 5. Type your message and attach files if needed.
- 6. Click Send.
- 7. To schedule for later:
  - a. Click Schedule Later icon instead of Send.
  - b. Choose the **date, time,** and **time zone,** and click **Schedule**.

III 🖉 Tick	ets Kr	nowledge Base Contracts	Customers	Analytics Activities Community Social Chat IM 🛛 All Departments - 🛨 🍳 🔮	= ¢ 🛞
<	8	Contact Properties	æ	(1) (3 AddTicket (2) (3	
	0	Contact Owner Jack Reacher		OVERVIEW HISTORY ACTIVITIES TICKETS HAPPINESS RATING ZOHO VOICE SMS EXTENSION =	
		Email Add Email Mobile		(§ Zoho Voice SMS Extension            13126356639 O         Search in current conversation         Q	
		Add Mobile Phone Solution			
"		Facebook Add Facebook Twitter Add Twitter			
		Zoho CRM Contact Type contacts		o Schedule SMS × DATE TIME Date Time Date 2025-03-18 17:45	
		10 Mar 12:48 PM Layout companypavi		Start a conversar (+5:30) India Standard Time ( Asia/K >	
				Cancel Schedule	
				Sales V II Sales Sales V II Sales	

# For Zoho Desk users without an active Zoho Voice account

If you are a Zoho Desk user and do not have an active **Zoho Voice account**, please follow the steps below before installing the **SMS for Zoho Desk by Zoho Voice** extension:

- Sign up and Sign in to Zoho Voice
- Plan purchase
- Number purchase
- Activate SMS/MMS in Zoho Voice

#### Sign up for Zoho Voice

- 1. Sign up here to **Zoho Voice**. Enter the credentials and click **Sign Up**.
- 2. Go to the <u>Home</u> page of Zoho Voice.
- 3. Click **Sign In** in the top-right corner of the page.
- 4. Fill in the credentials and click Sign In.

Sign in to access Zoho Voice			
	Ì		
Sign in using email OTP	Forgot password?	MFA for all accounts Secure online accounts with OneAuth 2FA. Back up OTP secrets and never lose access to	
Sign in		your accounts.	
		-	

**Note:** For users encountering an **Access denied** message like the one shown in the screenshot below, kindly contact our support (<u>support@zohovoice.com</u>).

← → C to voice.zoho.in/app/zvt.jsp	☆	•	New Chrome available
Voice			Logout
Uh oh!			
Sorry! Access is denied.			
Sorry, we have blocked this domain(Eg: Gmail) to prevent illegitimate use of service. Please use an official email address to create your Zoho Voice account.			
Go Back			

## Upgrade to a supporting plan

After successfully logging in to your Zoho Voice account, upgrade to a supporting plan. To upgrade to a supporting plan:

- 1. Go to **Settings** and to **Subscription** from the left bar menu.
- 2. Click **Upgrade plan** under the **Subscription** tab. You will be redirected to the **Zoho Store**.

🄇 Zoh	o Voice			TRIAL (Enterprise Telephony) Expires in 14 Days Try Other Edition (or) Upgrade	06:54 GMT (+00:00)	01:54 EST (-4:00)	06:54 GMT (+1:00)	CREDIT BALANCE	è ù	John • AVAILABLE	~
2000 Dashboard	Settings	Settings > Subs	scription								
ശ്ര) Live Calls ഹ്ര Logs	My Profile Deskphone Business Hours / Holidays			ENTERPRISE TELEPHONY - TRIAL Next payment on: 2025/01/15				\$ (	/user/year		
င Users ထို့ရှိ Queues	Audio Files Call Recording Profile Documents Blocked Numbers		Free Min Outgoing Incoming	utes ;: 2000 ;: 0				O UF	GRADE PLAN		
Contacts	Zoho Telephony Credit History Voice Rates		Note: Cri	VOICE CREDITS Last purchased on: 2024/12/30	hase on an as-nee	ded basis.		CREE 1000	IT BALANCE		
Call Config	Subscription								REDITS		

- 3. Click **Upgrade** under your preferred plan.
- 4. Enter the number of licence/users. Verify the total amount and click **Proceed**.
- 5. Enter your billing and payment details in the *Pay* section and click **Make Payment**.

Once the payment is successful, your Zoho Voice organization will be upgraded to the selected subscription plan.

#### **Purchase User Add-on**

For users who have decided to go with the **Solo** plan, you must purchase the **user add-on** since the solo plan as stand-alone doesn't support the SMS extension.

To purchase user Add-ons:

- 1. Go to **Settings**  $\rightarrow$  **Subscription** tab.
- 2. Click **Upgrade plan** and select **Buy Add-on** of SOLO.

• • •	& ZohoVoice	× 🔇 ZohoVoice										
	C 😳 voice.localzoho.co	om/app/zvt.jsp#/settings/	subscription								\$	
🔇 🖄	o Voice				SOLO (Business Phone) Upgrade	<b>13:22</b> GMT (+00:00)	09:22 EDT (-4:00)	<b>13:22</b> GMT (+1:00)	CREDIT BALANCE	t t	Keertha	na v LABLE v
<b>BB</b> Dashboard	Settings	Settings > Sub	scription									
ර Logs Vsers Queues ව Integration	My Profile Deskphone Business Hours / Holidays Audio Files Call Recording Profile Documents Blocked Numbers		Free Minutes Outgoing: 0 Incoming: 0	JSINESS PHONE : t payment on: dditional users: 0	- SOLO (1) - )				\$ 	O /month GRADE PLAN		
Contacts	Zoho Telephony Credit History Voice Rates		Note: Credits	VOICE CREDITS Last purchased of purchased are no	n: 2025/03/18 ot refundable. Please purc	hase on an as-nee	ded basis.		CRED 8	IT BALANCE		
# Numbers	Subscription											
Settings	Workflow											<b>3</b>

- 3. Choose the required user add-on count and click **Proceed**.
- 4. Enter your billing and payment details in the **Pay** section and click **Make Payment**.

Once the payment is successful, your Zoho Voice organization will be upgraded to SOLO+ user add-on

#### Number Purchase in Zoho Voice

After successfully upgrading to a supporting plan, you can purchase a local number. To purchase a number:

- 1. Go to the **Numbers** module.
- 2. Filter by the type of number or the country the number is associated with and click **Search**. A list of available numbers will be displayed.

🔇 Zoh	o Voice						<b>11:27</b> IST (+5:30)	00:57 EST (-4:00)	<b>05:57</b> GMT (+1:00)	CREDIT BALANC	e €	CAB Robert V OFFLINE V
Live Calls	Numbers											Page tips?
4) Logs												
	Туре	All	✓ Match	Contains	~ Co	ountry 💻 +1 * o	ə.g. 201-555-012	3		⊗ c	lear Search	
Messages	NUMB	All Toll-Free	DATION		ТҮРЕ				COST		ACTION	
Users	+1 747	Local	United Stat	es	Local (Call & SMS	( MMS)			1 credit/month		🖾 Buy N	umber
۲ Queues	+1 978	Personal Personal Unlimited	United Stat	ies	Local (Call & SMS	; / MMS)			1 credit/month		🖻 Buy N	umber
<i>C</i> Integration			United Stat	es	Local (Call & SMS	; / MMS)			1 credit/month		🖻 Buy N	umber
æ			📰 United Stat	es	Local (Call & SMS	( MMS)			1 credit/month		🖻 Buy N	umber
Contacts			United Stat	es	Personal Unlimited	(Call & SMS / MMS)			10 credit/mont	h	🖻 Buy N	umber
Dower Dialer			United Stat	es	Personal Unlimited	(Call & SMS / MMS)			10 credit/mont	h	🖻 Buy N	umber
G Call Config			United Stat	es	Personal Unlimited	(Call & SMS / MMS)			10 credit/mont	h	🖻 Buy N	umber
#			United State	es	Local (Call & SMS	( MMS)			1 credit/month		🖾 Buy N	umber
Numbers			United Stat	es	Personal Unlimited	(Call & SMS / MMS)			10 credit/mont	h	🖾 Buy N	umber
Settings			United Stat	es	Local (Call & SMS	( MMS)			1 credit/month		🖻 Buy N	umber

- 3. Click **Buy Number** next to the desired number of your choice.
- 4. A pop-up box will display the details of the selected number type. Review the details and click **Continue**.
- 5. In the **Purchase Number using Credit** page, enter a **Display Name** for the number for easy identification.
- 6. Attach the address proof by clicking on the **Add new** button. **Upload** the proof of business doc.

Note: Please submit your **Business Registration Certificate** as Proof of Business for verification.

🔇 Zoh	o Voice			<b>13:10</b> GMT (+00:00)	09:10 13:10 EDT (-4:00) GMT (+1:00)	CREDIT BALANCE	G: C <sup>III</sup> ( <sup>™</sup> → AVAILABLE →
Live Calls	Numbers		_		_		Page tips?
ی Logs			Purchase Number Using Credits		×		
Messages	Type All	~	NUMBER	+1		Q Search	n
0	NUMBER	LOCATIC	LOCATION	United States			ACTION
Users		E Unit	ТҮРЕ	Local 🛈 Call & SMS / MMS 🛈		onth	Buy Number
<u>9</u> 92			COST	1 credit/month		51(1)	
Queues		<b>E</b> Unit			t/n	nonth	Buy Number
ري Integration		<b>E</b> Unit	DISPLAY NAME*	Ex: Premium Support Number	t/n	nonth	Buy Number
83		E Unit	ADDRESS PROOF*	TEST	✓ + Add new t/n	nonth	🖻 Buy Number
Contacts		📰 Unit	ASSIGN AGENTS ①	Meet M × Nina × Sai ×	t/n	nonth	Buy Number
Power Dialer		<b>Unit</b>	Note: Phone number rental will be autor	natically deducted from your Credit ba	t/n lance every month. By	nonth	🖻 Buy Number
Call Config		= Unit	clicking buy, you deree to the terms an		t/n	nonth	Buy Number
# Numbers		= Unit	Ca	ancel Buy 🖻	t/n	nonth	Buy Number

7. Select the users/agents to assign this number as their default outgoing number.

Note: If you prefer, skip this step and assign the number later in **Call Config** module.

8. Click **Buy** and finalize the payment using credits.

**Note:** Phone number rental will be automatically deducted from your Credit balance every month. By clicking **Buy**, you agree to the **Terms and Conditions** 

🔇 Zoh	o Voice		<b>11:27</b> IST (+5:30)	00:57 05: EST (-4:00) GMT (+	57 CREDIT BALANCE ▶1:00) 121.54 ⊕ 🖓 1	Gas Content Co
Live Calls		Purchase Number Using Credits		×		
Messages		NUMBER	+44		(1000)	
ر Users		LOCATION	Local ①		-	
Queues		COST	1.5 credit/month		-	
<i>C</i>		DISPLAY NAME*	Ex: Premium Support Number		-	
		ADDRESS PROOF*	Proof for UK Business sample test	✓ + Add new	-	
Contacts		ASSIGN AGENTS ①	Enter agent		-	
Power Dialer		Note: Phone number rental will be auton clicking Buy, you agree to the <u>Terms and</u>	natically deducted from your Credit bala d Conditions	nce every month. By	and the second s	
Call Config #		Ca	ancel Buy 🕅		-	
Numbers					-	
Settings						

**Zoho Voice support** will verify your submission and approve the number upon successful completion of the number purchase.

🔇 Zoh	o Voice			09:45 04:4 GMT (+00:00) EST (-4	45 09:45 CREDIT BALANCE 4:00) GMT (+1:00) 14.48	🕞 🖈 🚅 🔇 Test	VAILABLE
	Numbers						Page tips?
(0) Live Calls							
4) Logs		0	Success	6 H 4	a come of		
Ę		(Contraction)	Number purchased	successfully!			
Messages		Statement of the local division of the local	Previous Credits	11 48			
CUsers			Used Credit	0 (Free number)			2
盎		(account)	Balance Credits	14.48			
Queues			Approval is pending fo you about it through e then.	or this number. We'll notify mail. Please wait until			
Integration		(Contraction)					
Contacts		()		ОК	and the second second		
Dower Dialer							
S							
Call Config							

#### **Documents required for number purchase**

To complete your number purchase, you'll need to provide any of the following documents:

- **Business Registration Certificate** A copy of your valid Business Registration Certificate is required.
- Local Address Proof You might need to submit proof of address for the region where you're purchasing the number. Acceptable documents include an **internet bill, water bill, or electricity bill.**
- Valid Business website Your business website details must match the submitted documents.

**Important Note:** In some regions, additional documents may be required, such as a government-issued ID or a passport copy. Requirements may vary, so please check with our support (<u>support@zohovoice.com</u>), before proceeding with number purchase.

## Activate SMS & MMS

Zoho Voice provides SMS and MMS services that are supported for local numbers in the US and Canada.

On the **Call Config** module, you can review information about all the phone numbers you've acquired.

To create a new request to enable SMS/MMS for a number:

- 1. Go to the **Call Config** module in the left sidebar menu of your Zoho Voice account.
- 2. In the **Active** tab, do one of the following:
  - Click the Enable SMS/MMS button at the top-right corner (or) Hover over the number you want to enable SMS/MMS for and click the Request SMS/MMS icon.

Live Calls	Active (4) Inactive (0) Pending (1)			<b>■</b> +All ×	Search number/name	+ Enable SMS / MMS Page	
4) Logs							
	NUMBERS	MODE	TYPE			<b>■ SMS / MMS</b>	
Messages	TEST SUPPORT 2	Agent	Local	✓ Enabled	✓ Enabled	⊗ Not Enabled 🛛 🖳 🕼 🏛	
٩							
Users	TEST SUPPORT	IVR	Local	✓ Enabled	✓ Enabled	() Requested	
æ							
Queues	TEST SUPPORT 3	Agent	Local	✓ Enabled	✓ Enabled	◎ Not Enabled	
Ô							
Integration	TESTING 호 🎫 +1	Agent	Toll-Free	✓ Enabled	✓ Enabled	<ul> <li>Not Available</li> </ul>	
Contacto							

- 3. Fill in the number details, attach a valid ID/address **proof**, and click **Submit**.
  - To upload a new ID/address proof, click the **+Add New** button.

🔇 Zoho Voice		<b>06:41</b> GMT (+00:00)	06:41 06:41 EDT (-4:00) GMT (+1:00)	CREDIT BALANCE 10.2485 ↔ 🖓 💭	• OFFLINE ~
and states a descent of the					
-	SMS / MMS Request		×		
1 11	Important note: SMS and MMS services w numbers. For more details, please refer to functionality will be enabled in 3-4 busines	II be activated only to 10DLC registere our <u>post</u> . After successful registration, s days.	ed Business phone , SMS /MMS		
A Constant of the local division of the loca	NUMBER TEST SUPPO	RT 2	~		
and the second second	COUNTRY* United	States	•		
and the second	ADDRESS PROOF* Business pro	of v	+ Add new		
	COMMENTS	nts	h		
	Canc	el Submit			
					•

Once the request has been raised, the status (SMS/MMS column) will be marked as Requested.

Our team will review the request, verify the details, and will start the activation process. During this process, the status will be changed to **In Progress**.

After SMS/MMS is successfully enabled, we'll notify you, and the status will be updated to **Enabled**.

#### Valid Local Address Proof Includes (any one):

- Internet Bill
- Water Bill
- Electricity Bill

#### Valid Government issued ID Includes (any one):

- Passport
- Driving License

#### Notes:

- In some cases, government ID proof might be needed.
- C A Business Registration Proof is mandatory.

**Important Note:** To use SMS/MMS services in the US and Canada, you must complete the **10DLC registration process**(refer to this <u>document</u>). This is a regulatory requirement and is essential to enable successfully and use SMS/MMS features in these regions.

Once your Zoho Voice account set up is completed, proceed to install the extension from the Zoho Desk Marketplace.