



Zoho Corporation

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# How to send SMS via Zoho Creator?

## How to send Zoho Voice SMS via Zoho Creator?

Follow the steps below to send automatic SMS via a Zoho Voice number directly from your Zoho Creator solutions.

### Step1 :

Login to <https://creator.zoho.com/>

### Step 2:

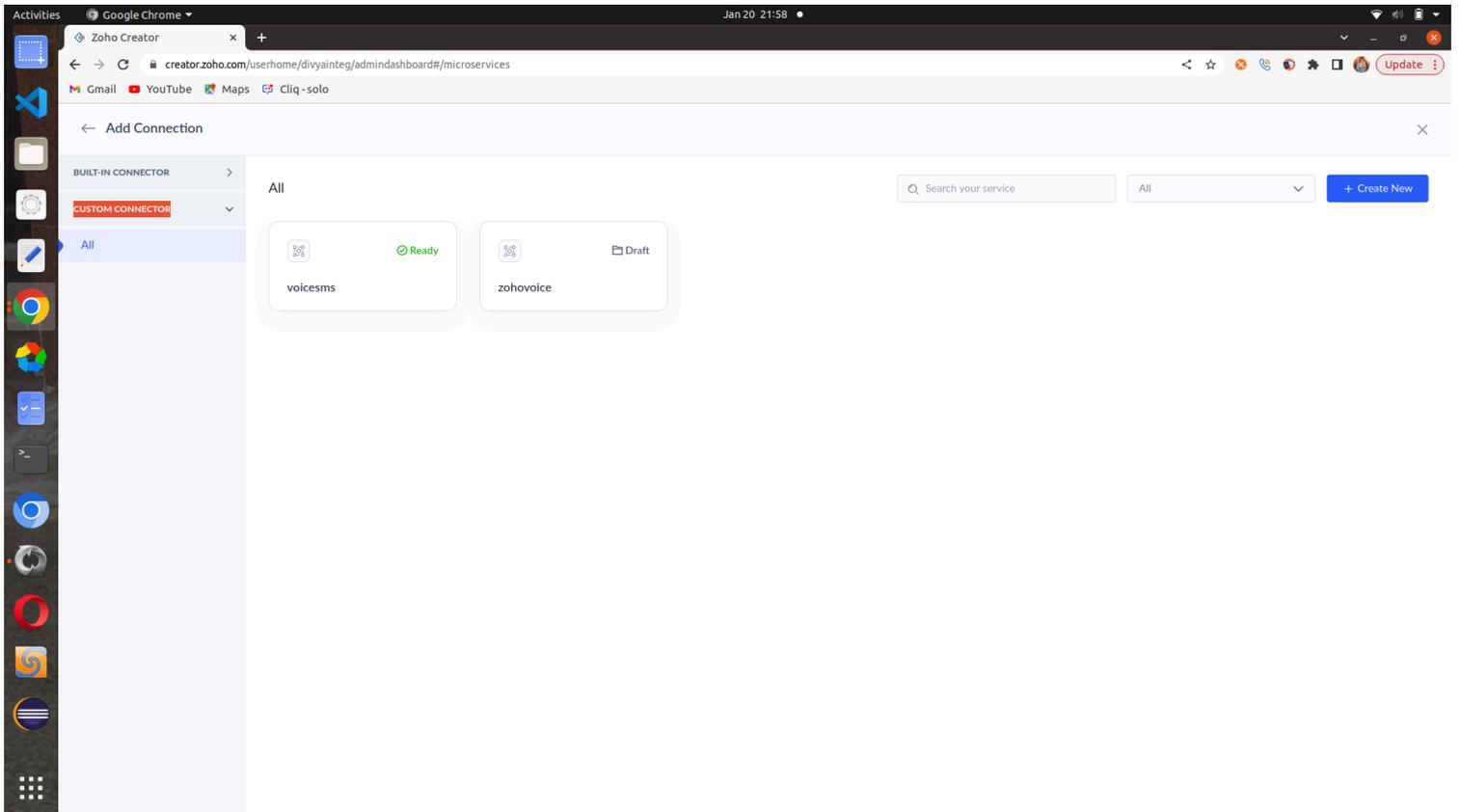
To create connectors for your Creator solution:

Go to **Microservices** - > **Create New** -> **Connections** - > **Pick & Create**

### Step 3:

Click **CUSTOM CONNECTOR** -> **Create New**

If you have previously created Custom Connectors, they will be displayed as cards on the Custom Connectors page. Click the **+Create New** icon in the top-right corner, a builder will appear.



#### Step 4:

Enter the connector name and save.

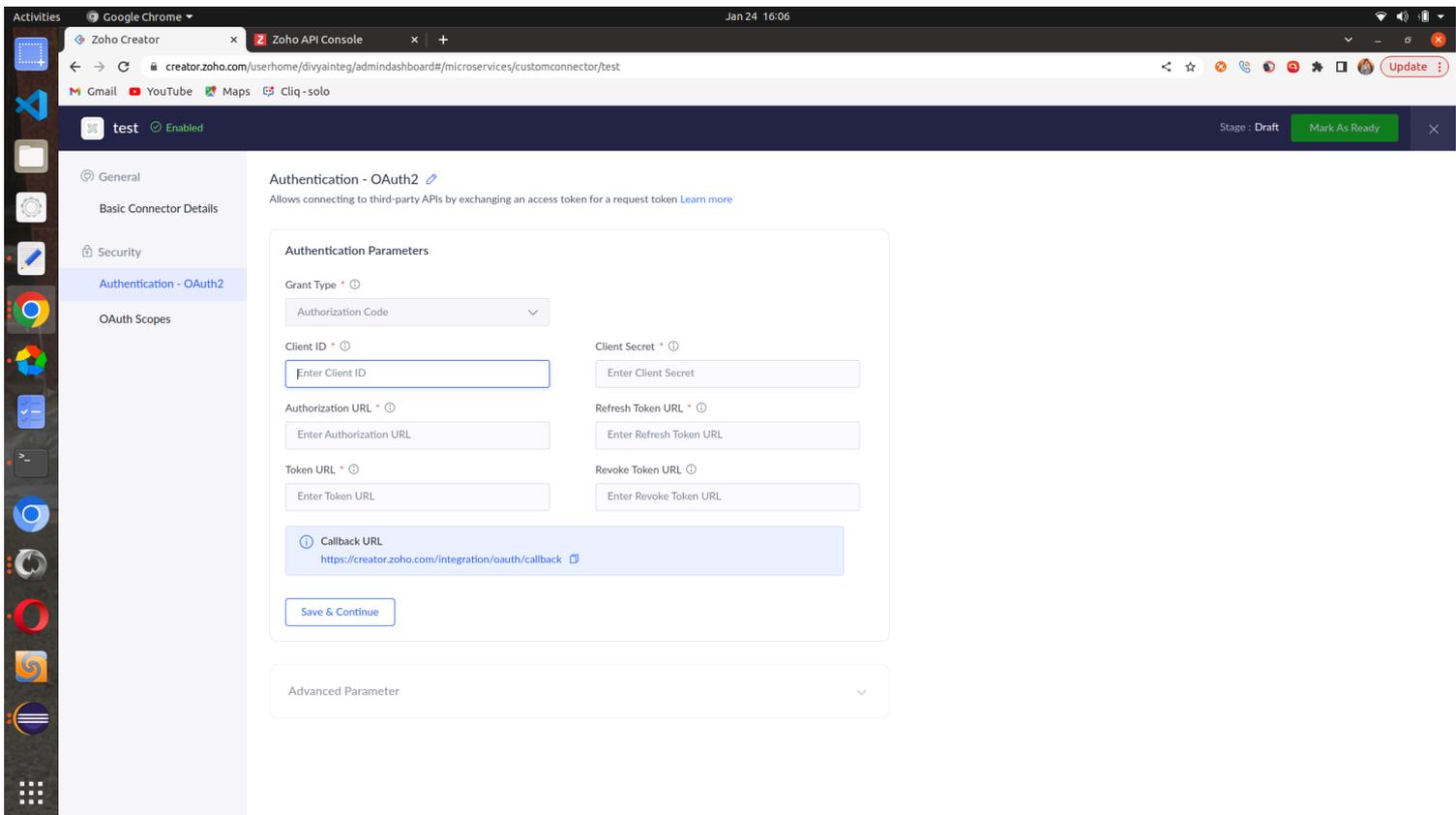
#### Step 5:

Enter **General** connector details such as **Connector name** , **Connector link name** , **Description**, and **Logo**-> Click **Save and continue**

#### Step6:

Defines the authentication settings of the Custom Connector, such as **Authentication Type**, **Authentication Parameters** and **Scopes**. Choose **OAuth2 Authentication** as the Authenticatio type then click **Save and continue**.

The **Authentication Parameters** appears in the subsequent page as shown below:



Copy the **Callback URL** into your clipboard to be updated in the API console.

### Step 7:

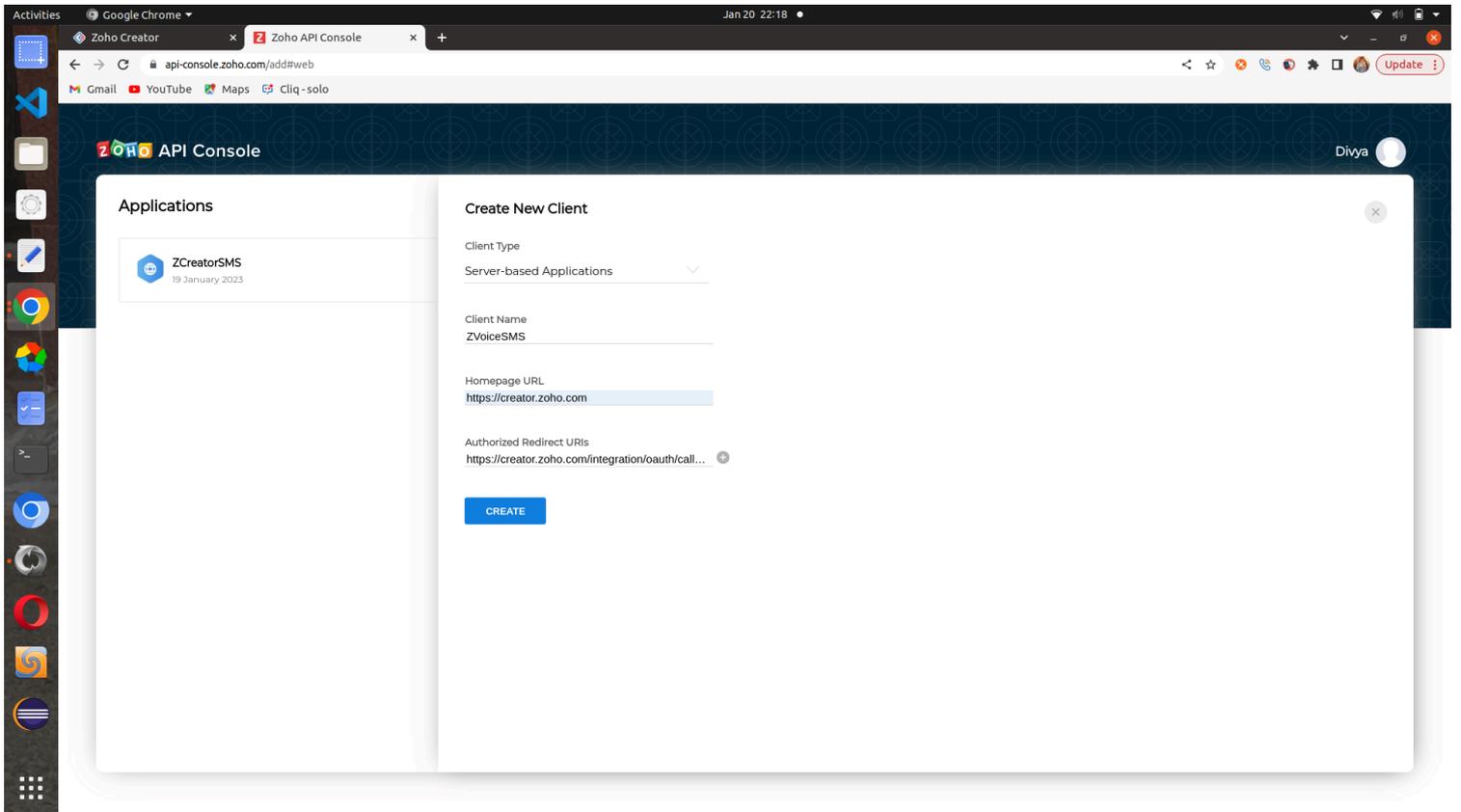
To update the authentication parameters, open a new tab in parallel go to <https://api-console.zoho.com/>

This will take you to the **Zoho API console** where you can directly access and configure the specific authentication API **ZCreatorSMS**.

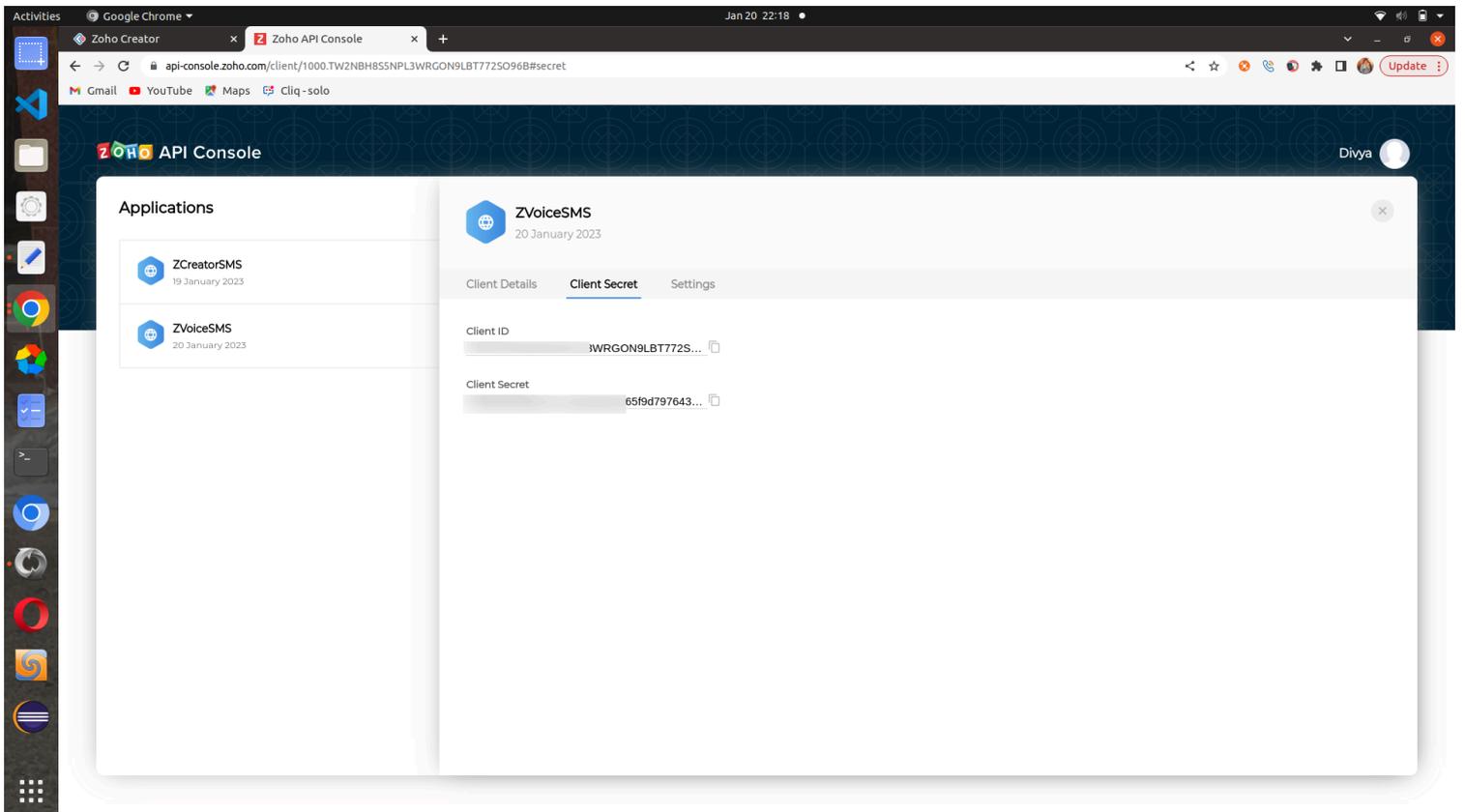
Click on **Add Client** and then choose **Server-based Applications**

### Step 8:

Add **Client name** and **Homepage URL**. Paste the **callback url** that you copied from your creator page into the **Authorized Redirect URL** and click **Create**.



Once the new client is created, Copy the **Client ID** and the **Client Secret** values that are automatically generated from the **Client Secret** tab.



**Step 9:**

In the creator page with **Authentication Parameters** as shown in **step 6**, paste the **Client ID**, the **Client Secret** and the following values in the respective fields.

Authorization URL : <https://accounts.zoho.com/oauth/v2/auth>

Refresh Token URL: <https://accounts.zoho.com/oauth/v2/token>

Token URL : <https://accounts.zoho.com/oauth/v2/token>

Revoke Token URL : <https://accounts.zoho.com/oauth/v2/revoke>

Then click the **Save and Continue** button.

After saving the **Authentication Parameters** in **OAuth2 Authentication**, You will be directed to the **OAuth Scopes** section or you can also navigate by clicking **OAuth Scopes** from the left pane.

### Step 10:

In the Creator page, now select the **OAuth Scopes** menu under the **Security** section and click **Add Scope**.

Key in the scope details as follows:

Scope Display Name : **ZohoVoice Send SMS**

Scope Value : **ZohoVoice.sms.ALL**

Then click on the **Mark as Ready** button to mark the custom connector just created as ready to use it in connection. Now the **Stage** of the scope will change from **Draft** to **Ready**.

### Step 11:

To integrate your Zoho Creator application with other cloud service like Zoho Voice, you need to configure a connection. This process of configuring a connection is twofold.

The first step requires you to **create the connection** with the specified parameters.

The next step requires you to **authorize the connection** for it to be functional.

Immediately after the connector is ready, **Add Connection** button appears, Click on **Add Connection**.

Give Connection Name as **zohovoice\_sms**.

For a connector with **OAuth2 type authentication**, you will be prompted to select **Scope** for Connection before creating a connection.

Select the **Always use the same authorization for all environments** checkbox, if you need the same credentials to be used to authorize across all [environments](#).

Click **Create and Authorize**. The connection will be created and prompted for authorization.

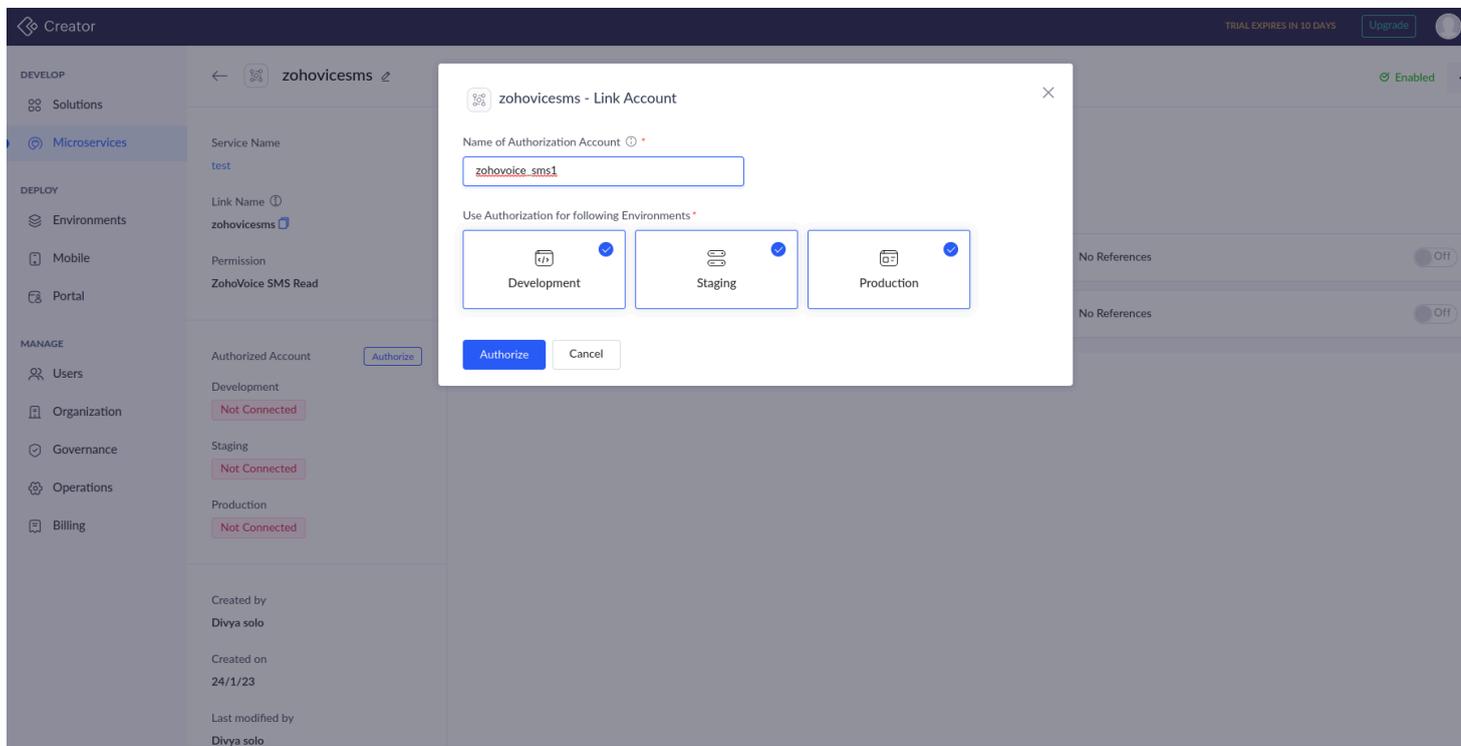


**Note:**

You cannot edit or delete scopes once you added connections with the [Custom Connector](#).

**Step 12:**

Enter the **Name of the Authorization Account** and the authorization credentials. The name provided is used to identify the authorization. The credentials required to authorize are based on the authentication type supported by the target service. Here it is OAuth2 authentication type.



On selecting the checkbox **Always use the same authorization for all environments**, all environments will be locked and the authorization will remain constant across environments.

Click **Authorize** and proceed to authorize access to the selected service.

With OAuth2 Authentication type, once you click Authorize, you will be redirected to the Zoho Voice Authorization Page. Now click **Accept** to accept the access permissions for the application.

Make sure you provide the name for the Connection as "**zohovoice\_sms**" then it will redirect to a new page.



### ZVoiceSMS

ZVoiceSMS would like to access the following information.



- To allow all operations on SMS

By clicking the "Accept" button you allow ZVoiceSMS to access data in your Zoho account.

[Accept](#) [Reject](#)

Now navigate to Microservices-> Connections, click on the connection card bearing the name: "**zohovoice\_sms connection**". Now enable connection access to application

Enabling the connection access allows other users to use the connection on your creator application. Turn on the Connection Access for the desired application by just dragging the toggle in the right to green, as shown below:

The screenshot shows the Zoho Creator interface. At the top, there's a notification: "Your zohovicesms connection has been successfully authorized" with a "Close" button. Below this, the "zohovicesms" connection card is shown with a green "Enabled" toggle. The main content area is divided into two sections: "Service Details" and "Connection Access".

**Service Details:**

- Service Name: test
- Link Name: zohovicesms
- Permission: ZohoVoice SMS Read
- Authorized Account: Re-Authorize
- Development: zohovoice\_sms1 (Test)
- Staging: zohovoice\_sms1 (Test)
- Production: zohovoice\_sms1 (Test)
- Created by: Divya solo
- Created on: 24/1/23
- Last modified by: Divya solo

**Connection Access:**

Turning on Connection Access allows other users to use this connection on the applications listed below.

| Application | References    | Access Status |
|-------------|---------------|---------------|
| ABC         | No References | Off           |
| zohovoice   | No References | Off           |

### Step 13:

Now, go to **Solutions**. click on **Create or Edit Solution**

Click on the **Workflow** button at the top to navigate to the workflow dashboard.

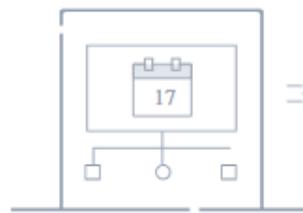
Then click **Create Workflow-> New Workflow**.

Select **While using the form** option to specify when you need to trigger the workflow.

## When do you want to run your action?



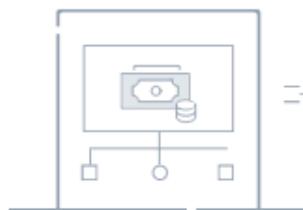
On a form event



On a scheduled date



On an approval activity



On a payment activity



On a function call

Key in the required details:

### Run workflow on any event in the form

Choose form

Run when a record is (Record Event)  Created  Edited  Created or Edited  Deleted

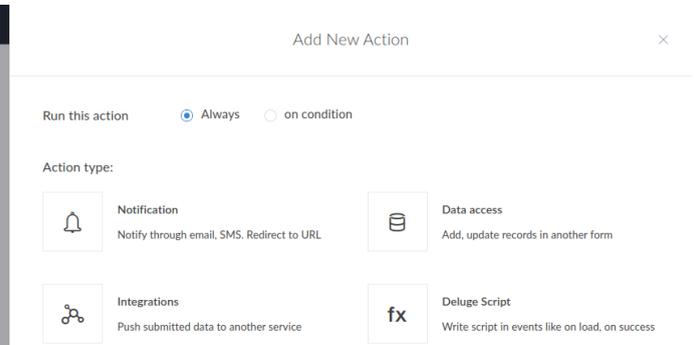
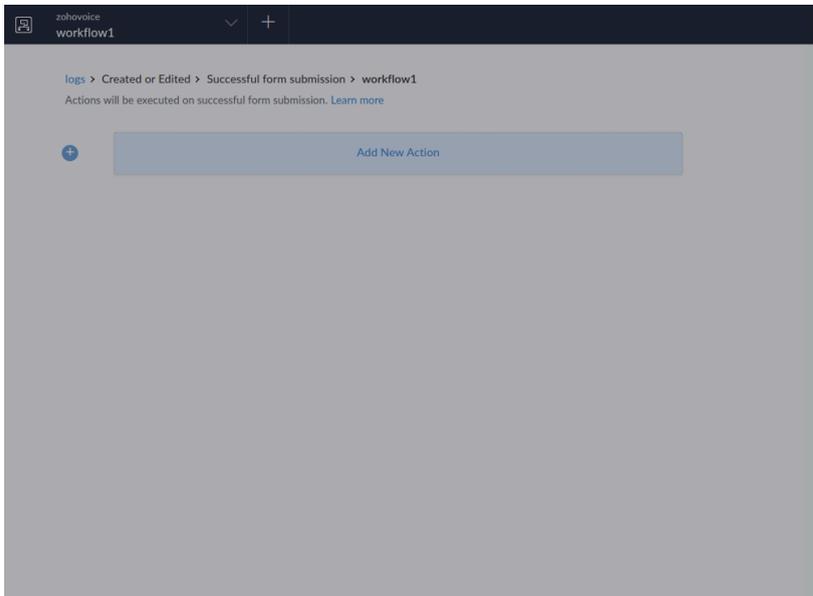
When to trigger workflow (Form Event)

Name the workflow

Choose the required form by the form name. Select **Created or Edited** option as the **Record Event** and **Successful Form Submission** option as the **Form Event**. Finally name the workflow and click on the **Create Workflow** button. The workflow builder will appear as shown in the example illustration below:



Click **Add New Action**. The actions associated with the chosen form event are displayed.



Choose **Deluge Script**.



**Info:**

Connections using Custom Connectors should be invoked using Deluge [invoke URL task](#), mentioning the respective action API, for any specific scenario/workflow as given in the code below.

Paste the code below and save. Finally Click **Done** to exit the workflow builder.

```
response = Map();

dataTxt = Map();

dataTxt.put("message","this is test SMS");

dataTxt.put("customerNumber",input.{FORM_FILED});

dataTxt.put("senderId","+1484292YYYY");

resp = invokeurl

[

    url :"https://voice.zoho.com/rest/json/v1/sms/send"

    type :POST

    parameters:dataTxt.toString()

    headers:{"Content-Type":"application/json"}
```

```
connection:"zohovoice_sms"  
  
];  
  
info resp;
```

Inside the code:

**input.{FORM\_FILED}** serves as the placeholder for the numbers submitted via your Zoho Creator solution

Hardcode the zoho Voice number that is supposed to send messages near the variable **senderID**

For more convenience, it is best to have the connector name as **zohovoice\_sms** throughout the setup.