



User Guide for IM Integration with Zoho Voice

Zoho Voice is a cloud-based phone system that offers a variety of features to help businesses improve their communication with customers. One of the most recent additions to Zoho Voice is the integration with the instant messaging apps, WhatsApp and Telegram. This integration allows businesses to connect with customers on the platforms they already use, leading to improved customer satisfaction and loyalty.

Prerequisites for IM integration with Zoho Voice

Before getting started, ensure the following prerequisites are met for hassle-free integration with WhatsApp and Telegram:

For WhatsApp

1. An active **Zoho Voice** account
2. A **Facebook Business Manager** account
3. A verified business
4. A **WhatsApp Business Account(WABA)**
5. A prepaid line of credit for your WhatsApp Business Account
6. A valid business phone number capable of receiving or making calls and SMS to access the WhatsApp Business API.

Info: Numbers from countries that do not support WhatsApp within their geographical boundaries cannot be used to access the WhatsApp Business API.

Note: When integrating WhatsApp with Zoho Voice, ensure the **correct WhatsApp Business Account number is configured**. Incorrect configuration cannot be reversed and once a WhatsApp account is integrated, it **cannot be dissociated** from the Zoho Voice account.

For Telegram

1. An active **Zoho Voice** account
2. A **verified** business
3. A **Telegram** account

Note: IM integration is supported in Zoho Voice for all the plans, **except** for the **SOLO and TRIAL** plans.

Getting Started

Integration Process

Once you have created the necessary accounts, you can follow these steps to integrate WhatsApp and Telegram with Zoho Voice:

1. Log in to your **Zoho Voice** account.
2. Navigate to the **Integrations** section.

3. Select WhatsApp or Telegram (depending on which platform you want to integrate).
4. To configure WhatsApp, [refer to this page](#).
5. To configure Telegram, [refer to this page](#).

Core Features

Zoho Voice's IM integration offers a variety of components that can help businesses improve their communication with customers.

Feature	Description
Sandbox Testing	Zoho Voice provides a sandbox environment that allows you to test the IM integration features before using them with live customers.
WhatsApp Configuration	To use WhatsApp integration, you must create a WhatsApp Business Account and link it to your Zoho Voice account.
Telegram Configuration	To use Telegram integration, you must create a Telegram bot and configure it in your Zoho Voice account.
Channel Creation and Management	Channels are used to manage incoming and outgoing IM conversations. You can create multiple channels and assign agents to them.
Agent Assignment	You can assign agents to channels to handle customer inquiries. Agents can be assigned to multiple channels.
Template Messages (WhatsApp)	<p>Template messages are pre-approved messages that businesses can send to customers through WhatsApp. Template messages can be used to save time and ensure that all customer communications are consistent.</p> <p>There are 2 types of Template messages, Utility: Includes specificities about user transactions Marketing: Helps generate awareness about the business</p> <p>Note: Template messages are used to initiate a conversation (only as outbound messages) and have to be approved by WhatsApp before sending them to the users.</p> <p>Template messages are supported only in WhatsApp integration.</p>
Canned Messages	Canned messages are pre-drafted responses that can be used to save time when responding to frequently asked questions. Canned messages can be used for both WhatsApp and Telegram conversations.
Auto-Responses	Auto-responses are pre-written texts that are automatically sent to customers when they initiate a conversation. Auto-responses can be used to greet customers and let them know that their message has been received.
Invite Options	Zoho Voice offers a variety of ways to invite customers to chat with you on WhatsApp or Telegram. You can generate a link, QR code, or message button that customers can use to start a conversation.

Message Handling	When a customer sends a message, it will be routed to the appropriate channel. Agents can then pick up the message and respond to the customer. Messages can also be assigned to specific agents or transferred between agents.
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What IM Integration can do for businesses?

There are several benefits to using IM integration for businesses, such as:

- **Improve customer satisfaction**, where customers can now reach businesses through their preferred communication channels, leading to a more positive user experience.
- **Increase efficiency** thereby businesses can handle customer inquiries more efficiently by using IM to communicate with customers. Multi-channel engagement with media-sharing features helps users share their queries with ease and assists agents with the resolution time.
- **Reduced costs** when compared to traditional phone calls, while IM can be a more cost-effective way to communicate and help businesses reach more customers.
- **Seamless user engagement** helps businesses build stronger relationships with customers by communicating with them on a more personal level through IM.
- **Improved scalability** in handling increasing customer volumes without compromising performance by associating multiple agents to a single channel and managing high-priority queries with experienced agents.

Multi-channel communication for the long haul

By combining the strengths of both WhatsApp and Telegram, Zoho Voice provides a comprehensive solution for businesses seeking to enhance customer engagement and drive business success.