



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

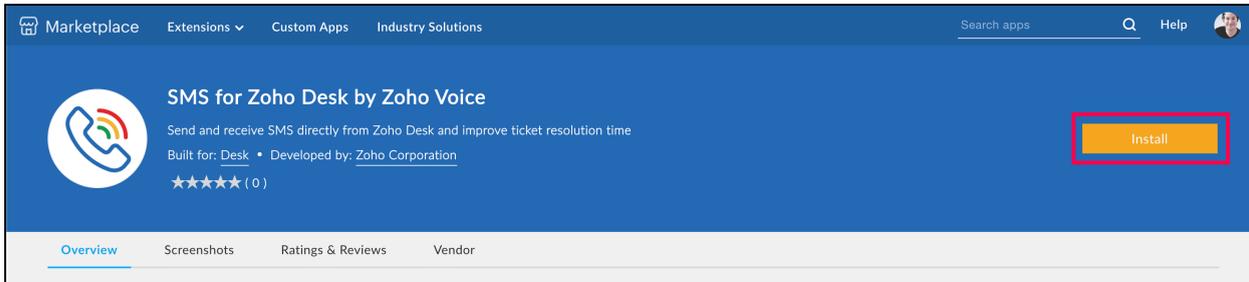
- Install the SMS for Zoho Desk by Zoho Voice extension
- Send SMS/MMS in Zoho Desk using this extension

Installing the SMS for Zoho Desk by Zoho Voice Extension

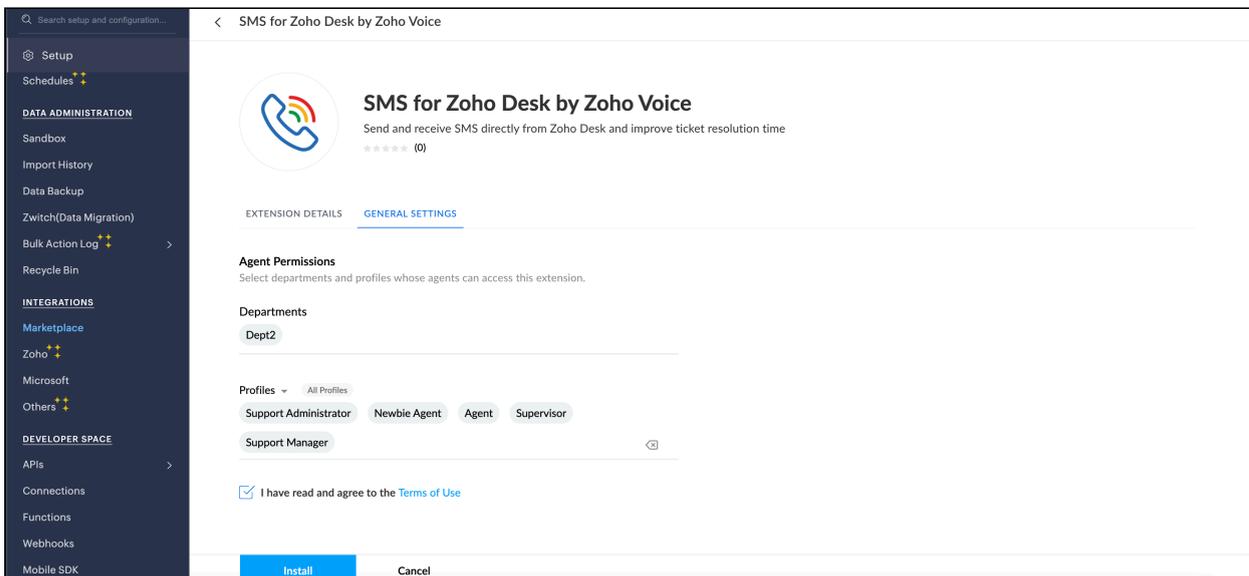
To start sending SMS/MMS messages directly from **Zoho Desk**, you need to install the **SMS for Zoho Desk by Zoho Voice** extension.

To install:

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

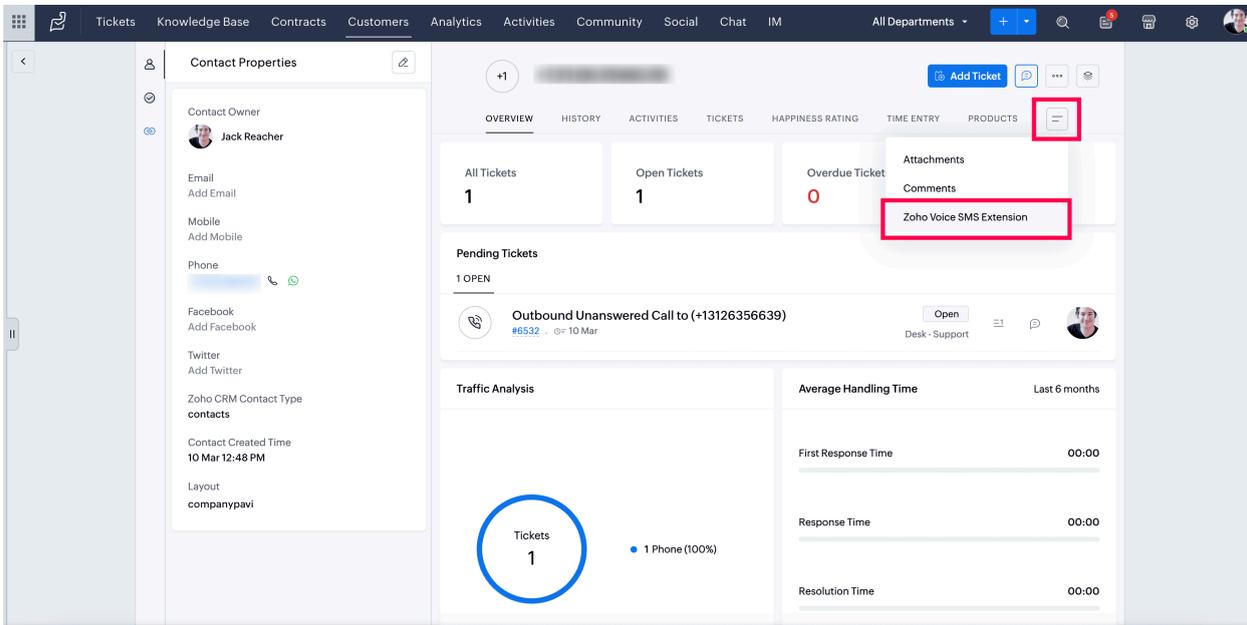


3. Review your profile details and make any changes if needed.
4. Confirm the installation by accepting the **Terms of Service** and **Privacy Policy**.
5. In general settings, select the **Departments** and **Profiles** whose agents should have access to this extension.
6. Agree to the **Terms of use**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

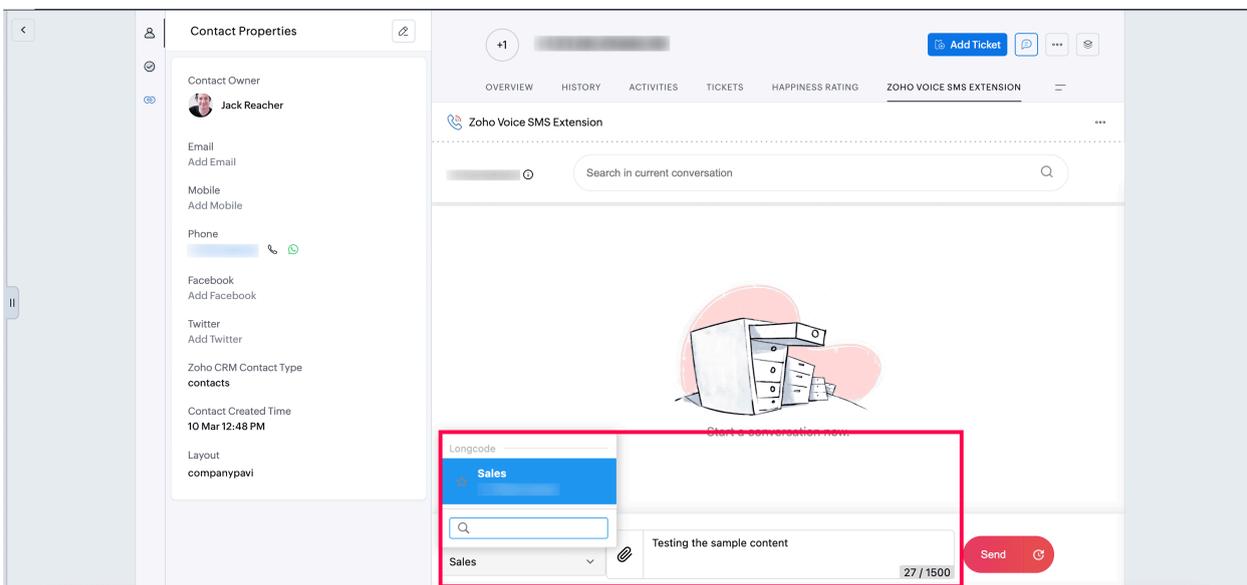


Send SMS/MMS using the extension in Zoho Desk

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**.



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



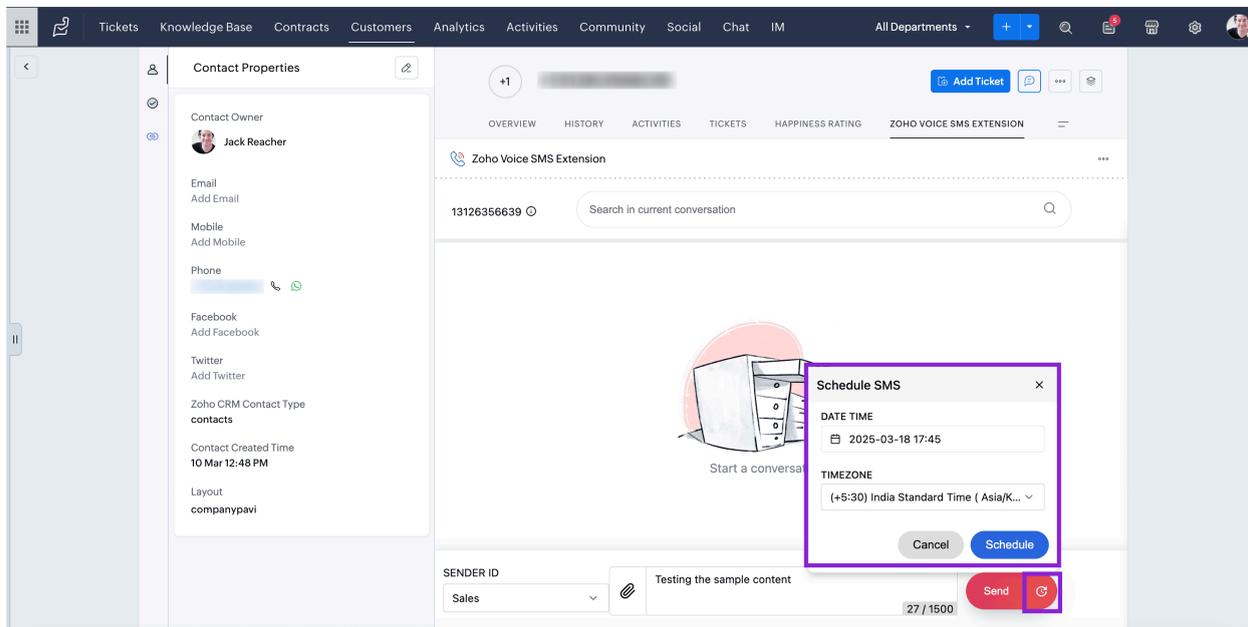
5. Type your message and attach files if needed.

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**.



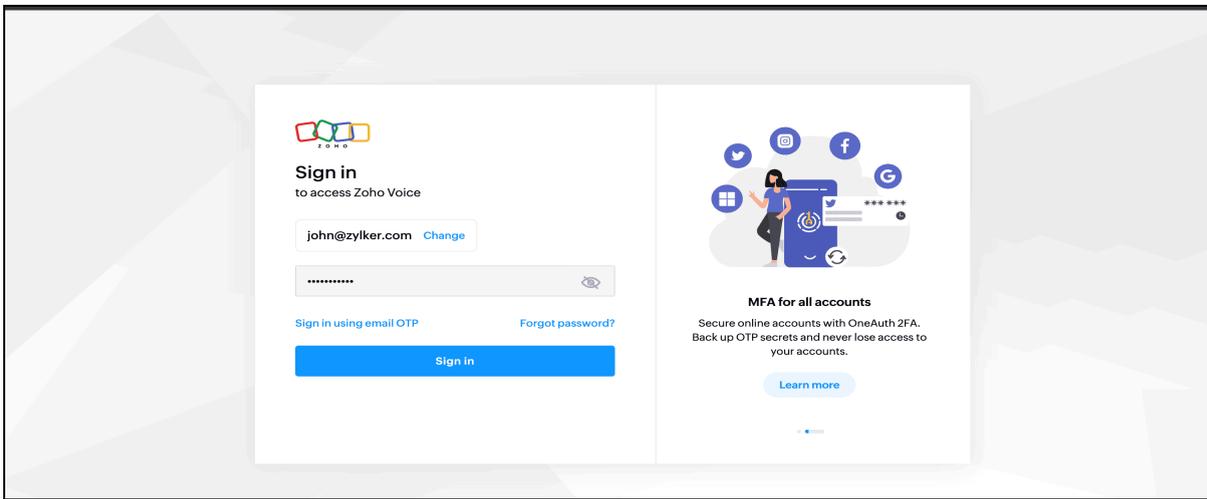
For Zoho Desk users without an active Zoho Voice account

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:

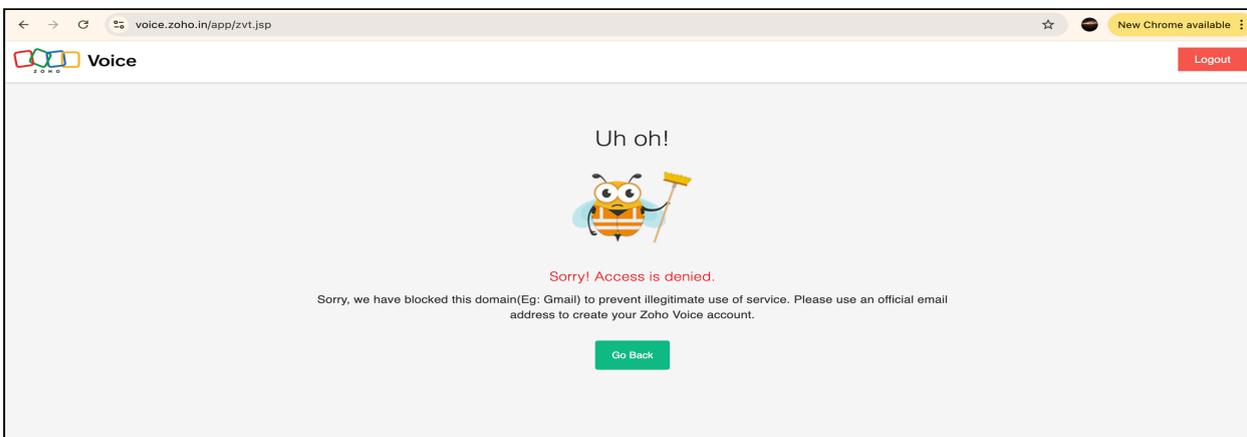
- Sign up and Sign in to Zoho Voice
- Plan purchase
- Number purchase
- Activate SMS/MMS in Zoho Voice

Sign up for Zoho Voice

1. Sign up [here](#) to **Zoho Voice**. Enter the credentials and click **Sign Up**.
2. Go to the [Home](#) 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**.



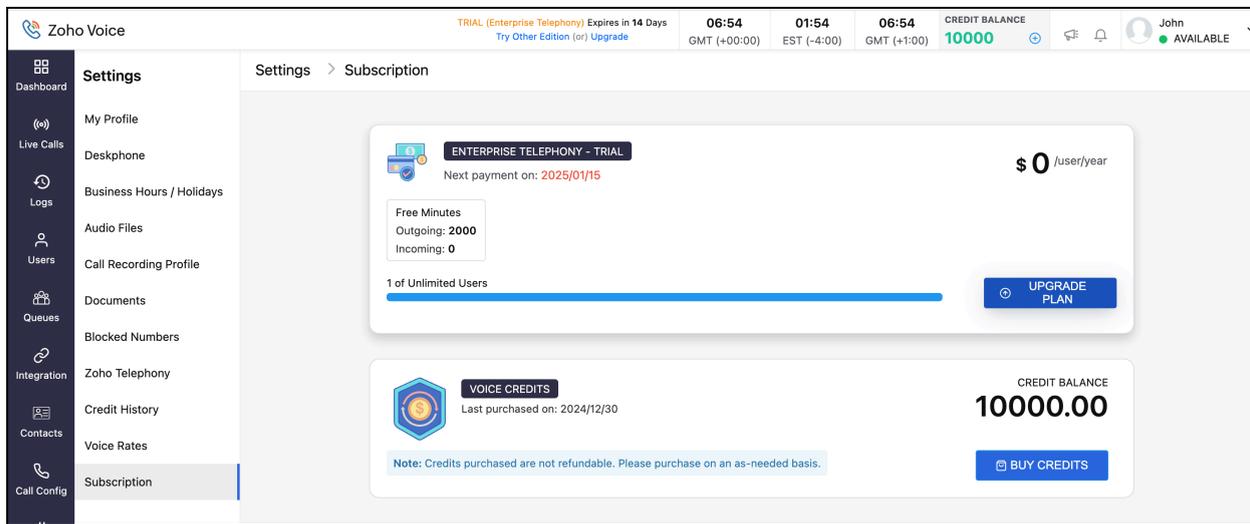
Note: For users encountering an **Access denied** message like the one shown in the screenshot below, kindly contact our support (support@zohovoice.com).



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**.



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**.

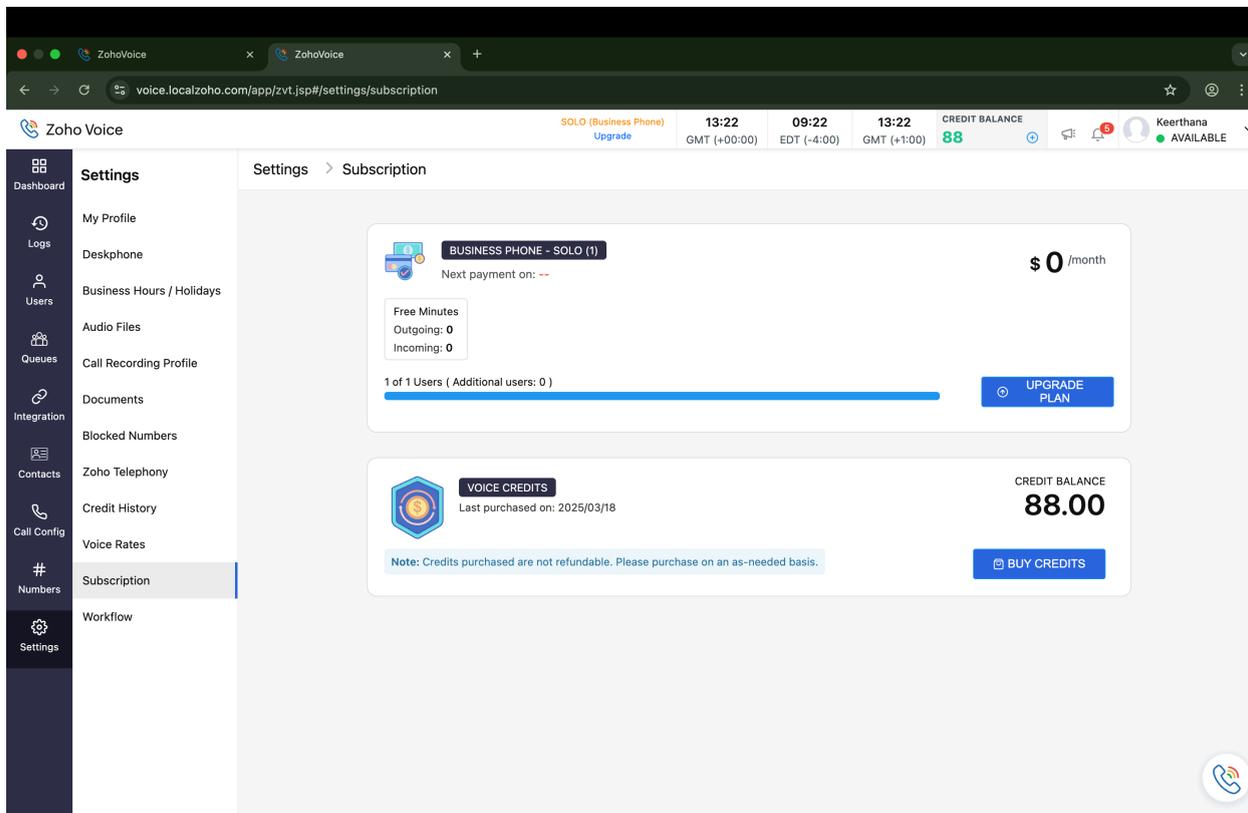
Once the payment is successful, your Zoho Voice organization will be upgraded to the selected subscription plan.

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** → **Subscription** tab.
2. Click **Upgrade plan** and select **Buy Add-on** of SOLO.



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**.

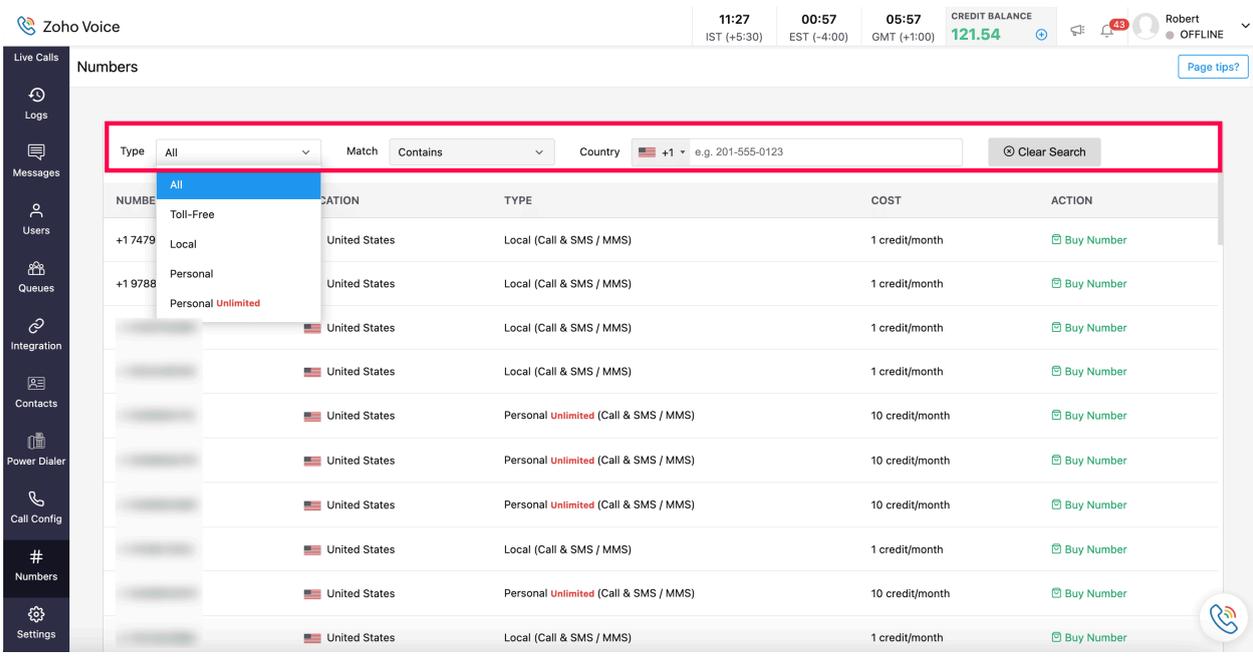
Once the payment is successful, your Zoho Voice organization will be upgraded to SOLO+ user add-on

Number Purchase in Zoho Voice

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

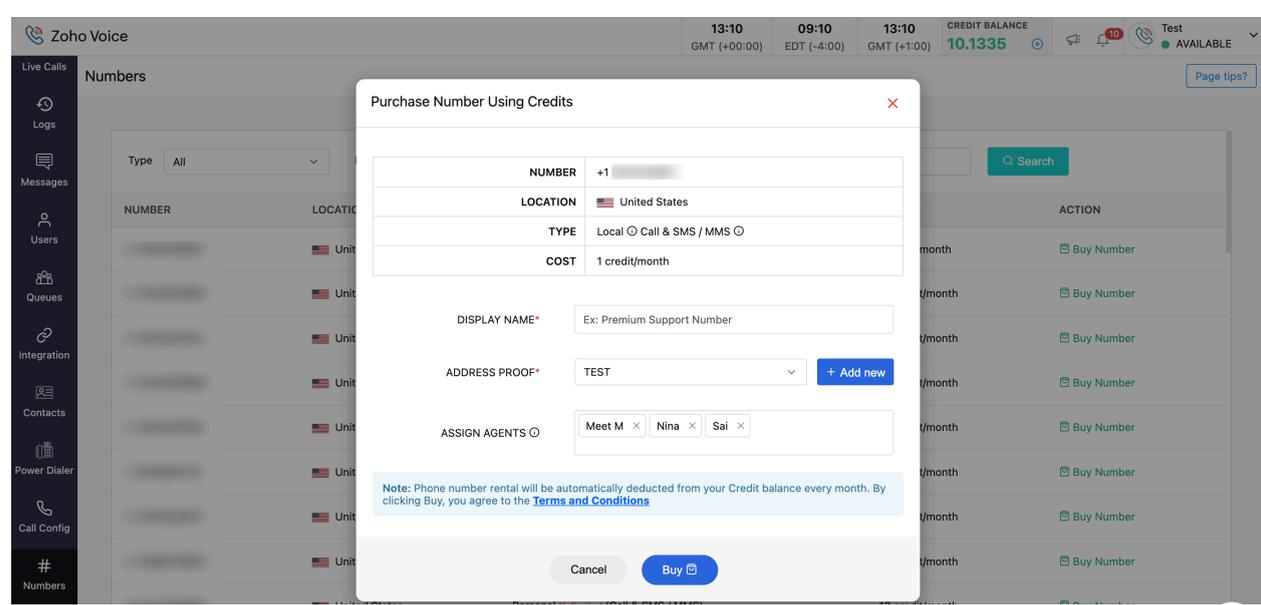
1. Go to the **Numbers** module.

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.



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.

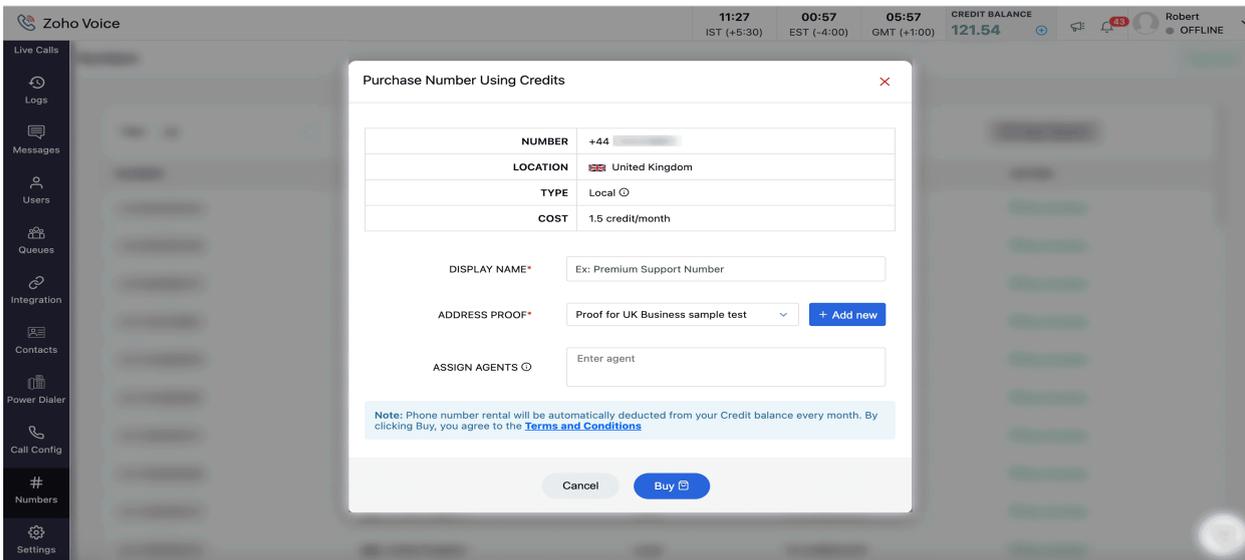


7. Select the users/agents to assign this number as their default outgoing number.

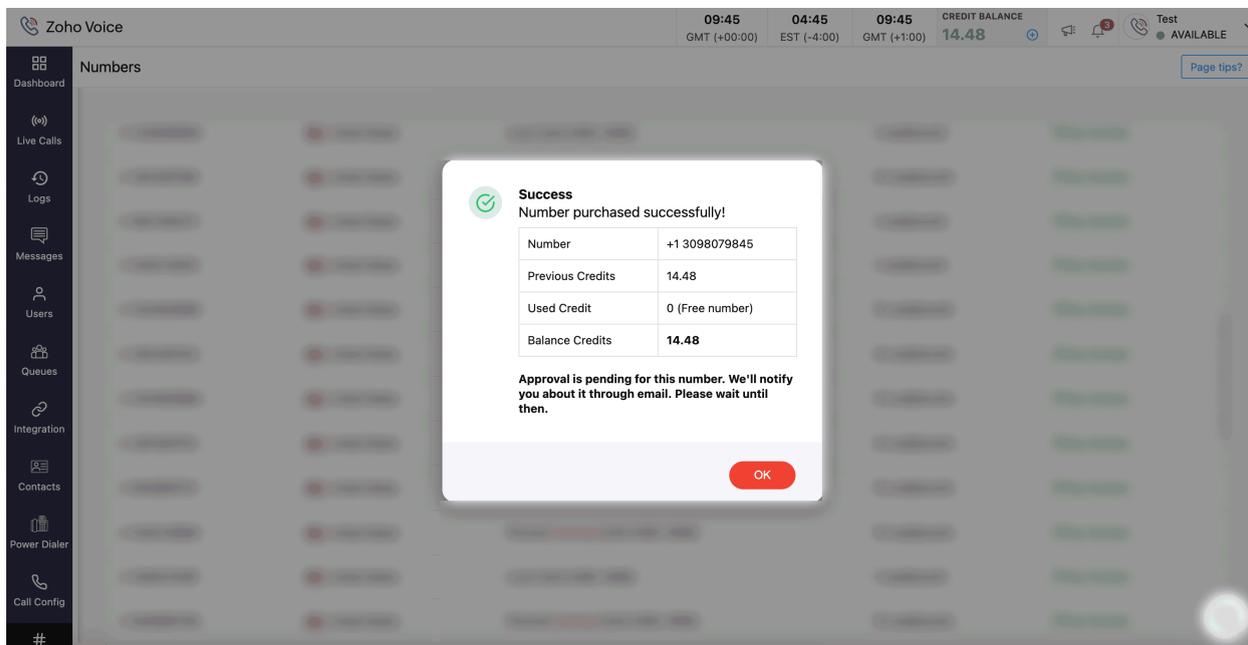
Note: If you prefer, skip this step and assign the number later in **Call Config** module.

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](#)



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



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 (support@zohovoice.com), before proceeding with number purchase.

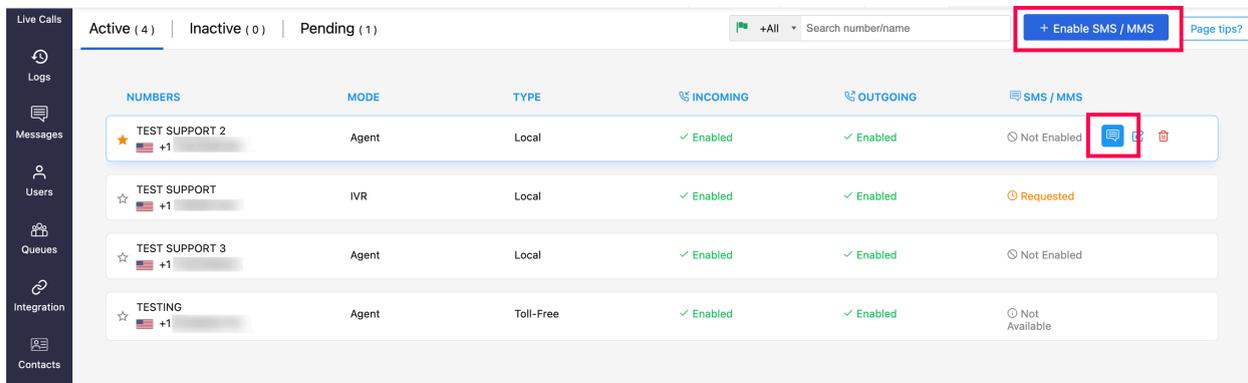
Activate SMS & MMS

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.

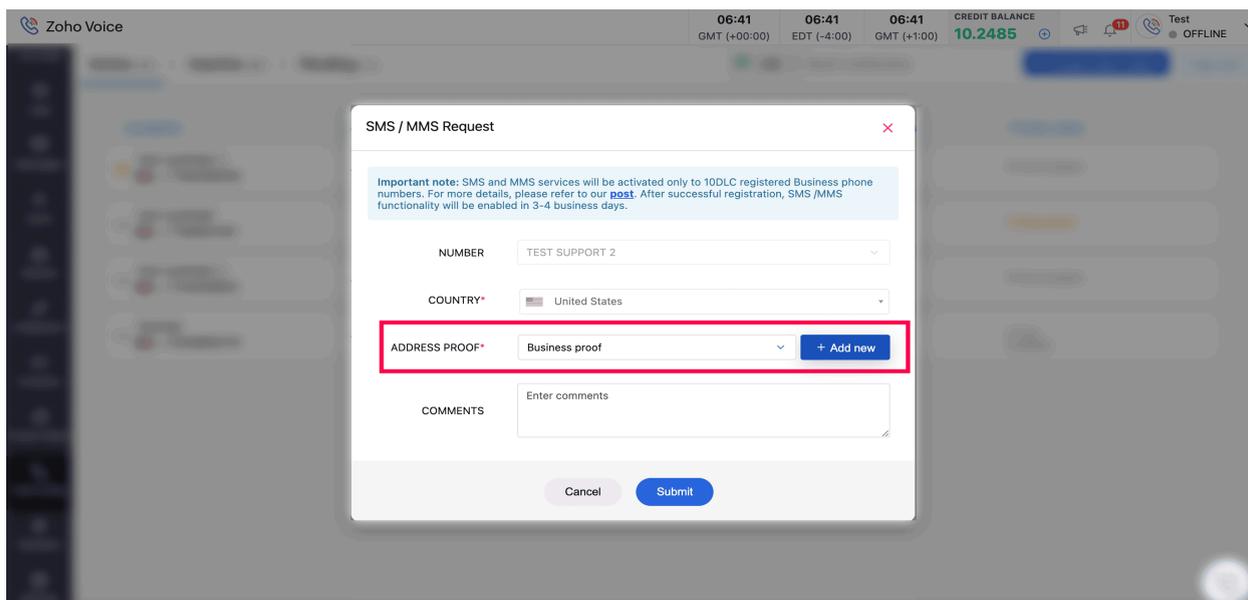
To create a new request to enable SMS/MMS for a number:

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**.



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.



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.

 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 [document](#)). 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.