

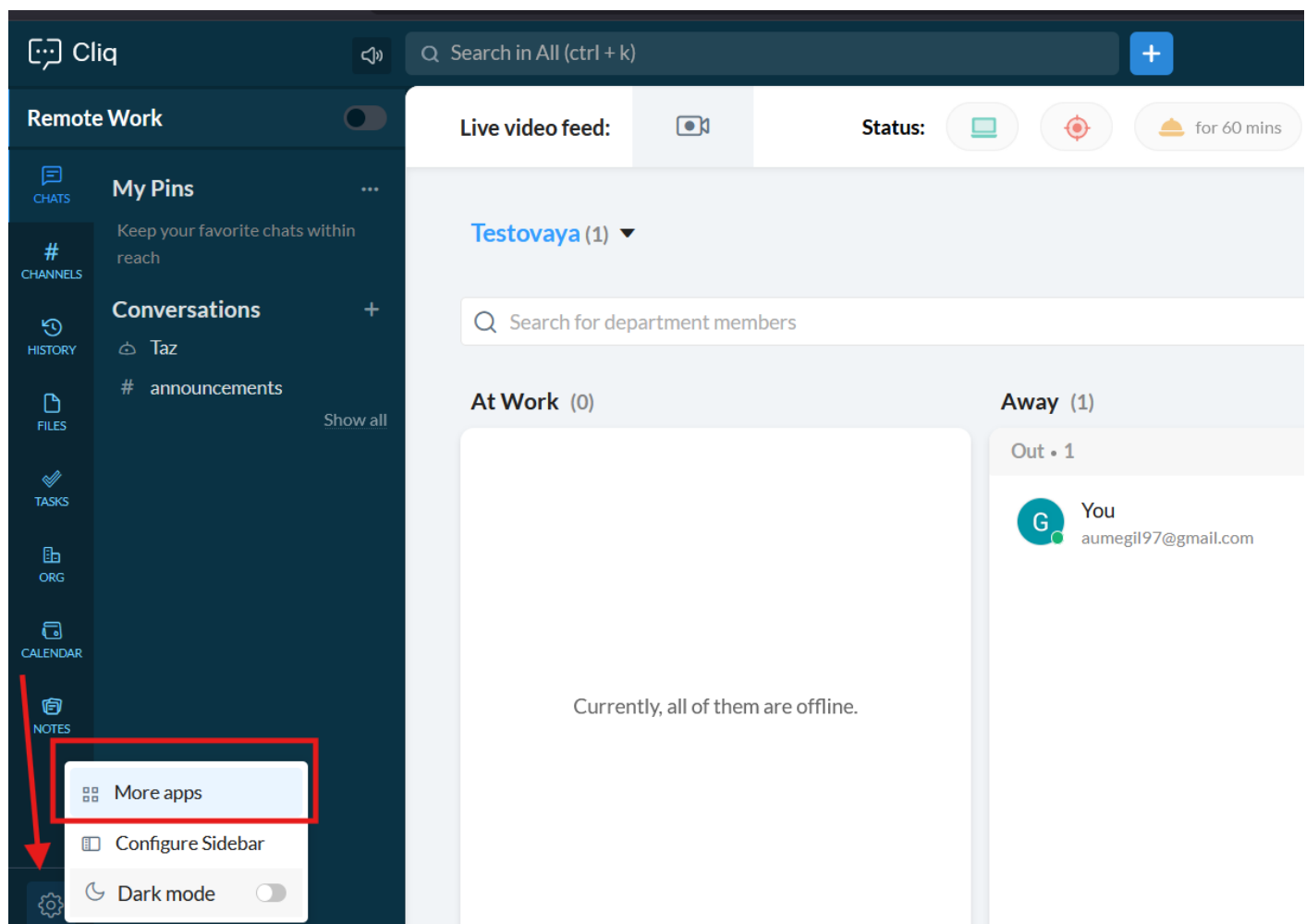
WhatsApp for Zoho CRM \ CLIQ

- [WhatsApp Business API for Zoho Cliq: Installation and sending the first message.](#)
- [How to create a template for WhatsApp Business API](#)
- [How to improve your mailing](#)
- [How to initiate dialogue in Zoho](#)

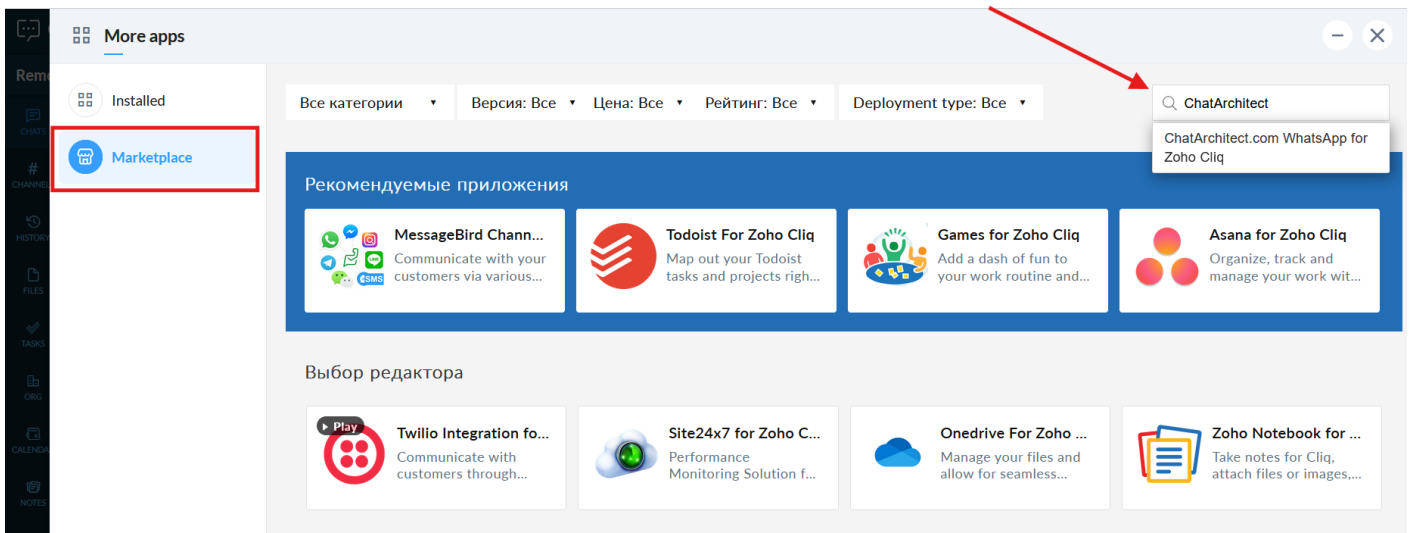
WhatsApp Business API for Zoho Cliq: Installation and sending the first message.

In this guide, you will learn how to install our WhatsApp Business API integration in Zoho Cliq.

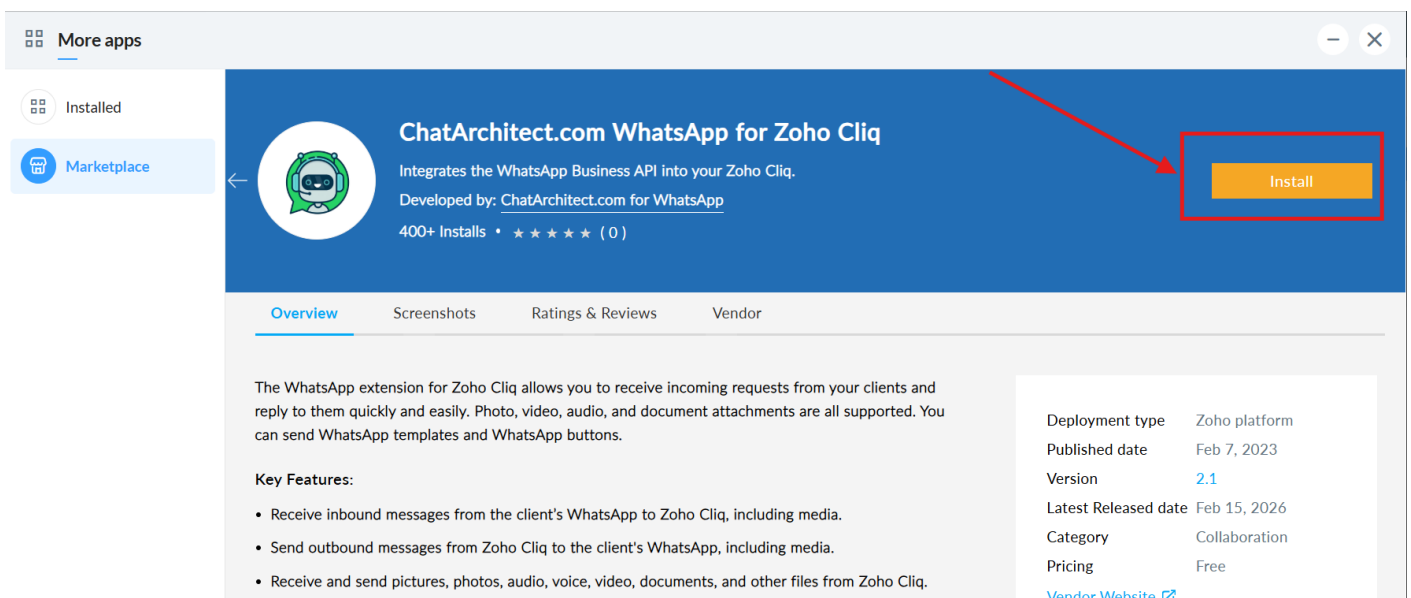
1. First of all, go to the **"Settings"** -> **"More apps"**



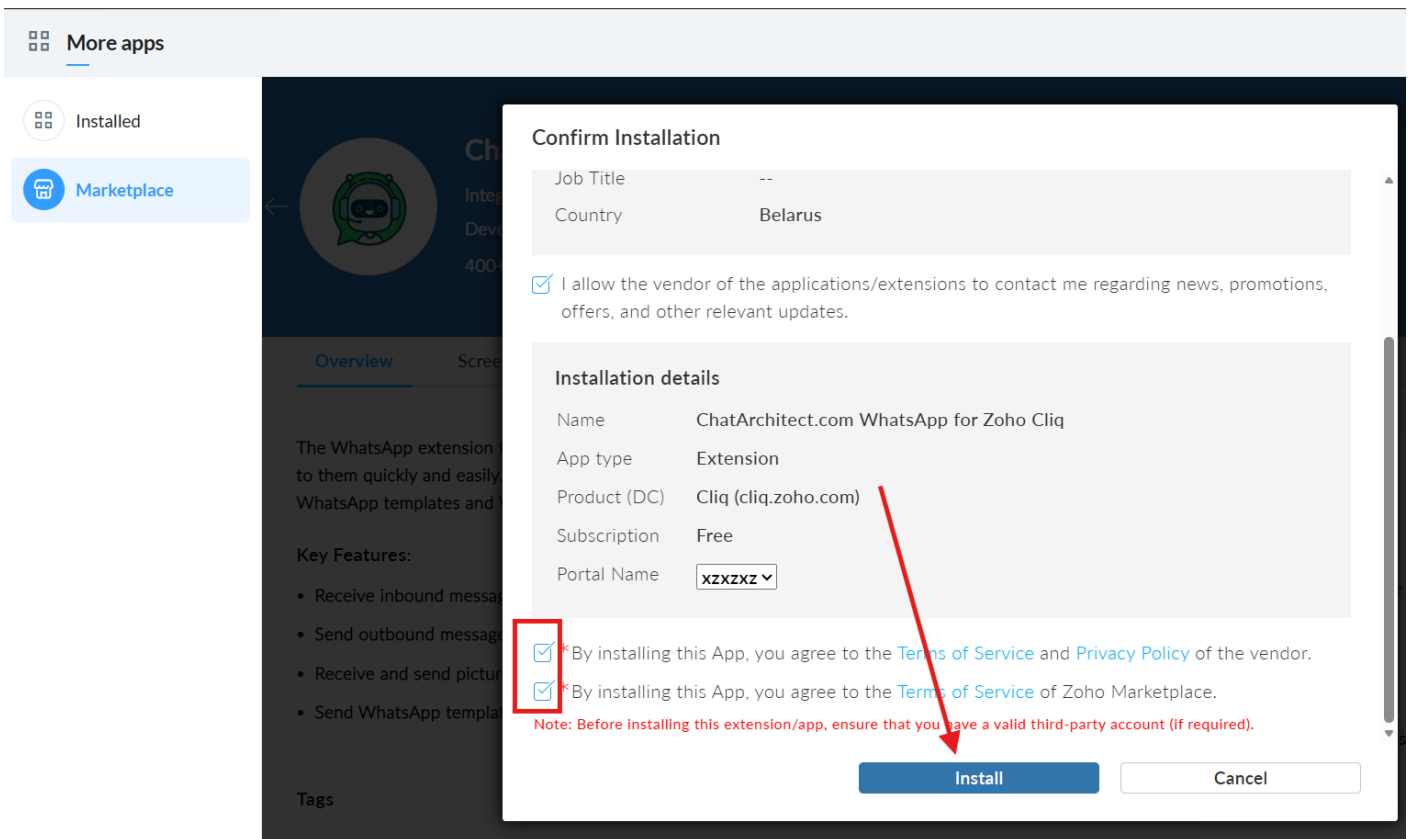
2. Go to the **"Marketplace"** and fill in in the search field **"ChatArchitect"** and choose our app



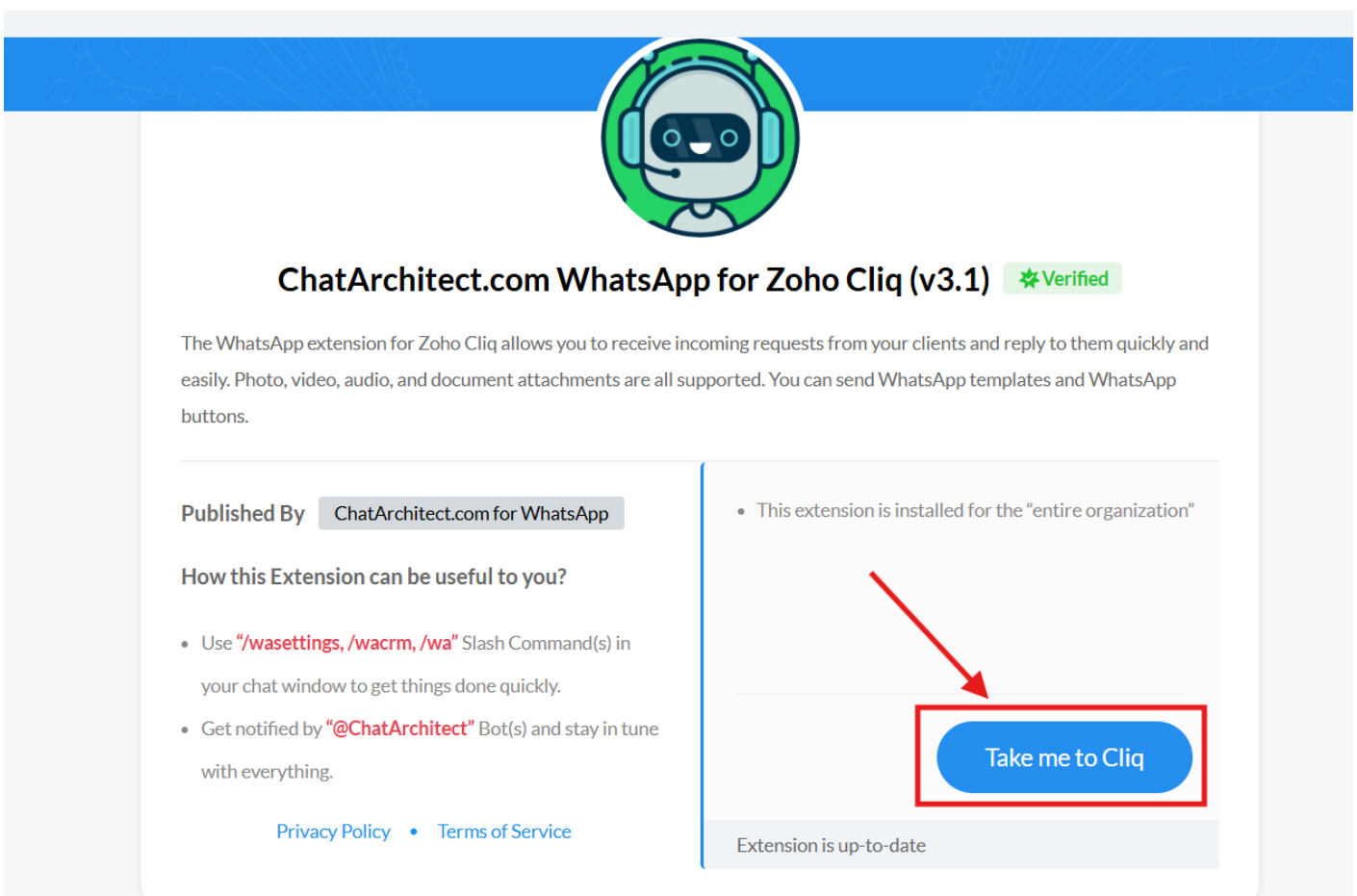
3. Press "Install"



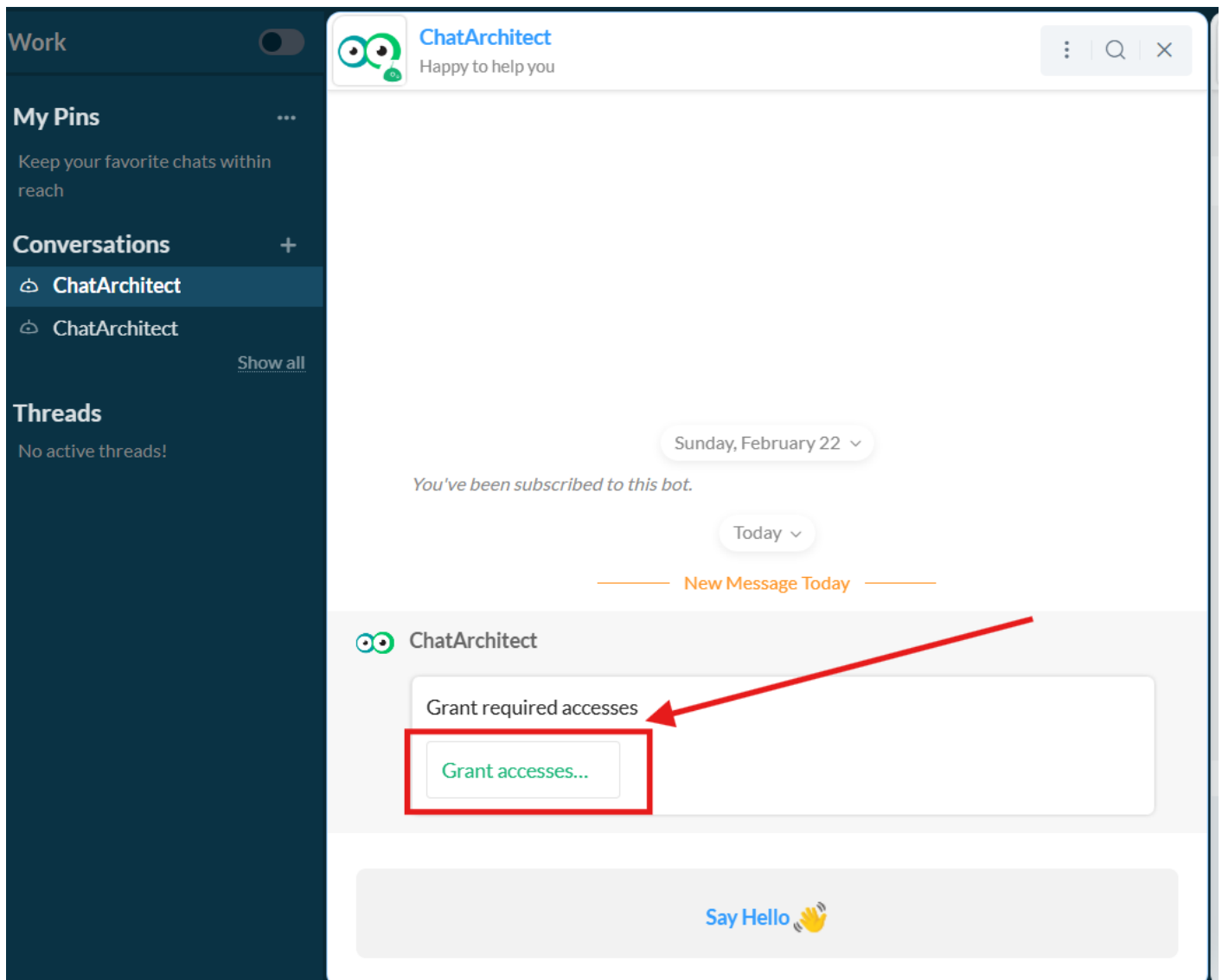
4. Check the boxes and click the "Install" button.



5. Press "Take me to Cliq" button



6. Choose "Grant access"



7. Check the boxes and press "**Accept**"

ChatArchitect.com would like to access the following information.



Zia Search

- READ To search your data across Zoho apps.



Cliq

- Create new channels
- Access all your channels
- Modify your channels
- Remove your channels
- To post messages to your conversations directly or by using Incoming Webhooks
- To get Attachments
- To get Messages



CRM

You are not a part of any org. So CRM permission(s) will not be granted.

- ✗ get leads data
- ✗ get org data



I acknowledge that I do not have access to certain organizations for some services, and I choose to proceed with limited access.



I allow ChatArchitect.com to access the above data from my Zoho account.

Accept

Reject

8. Fill in your **APP ID** and **APP SECRET** and press "**Save settings**"

Settings

Choose language

English

Type your whatsapp api login

bQW

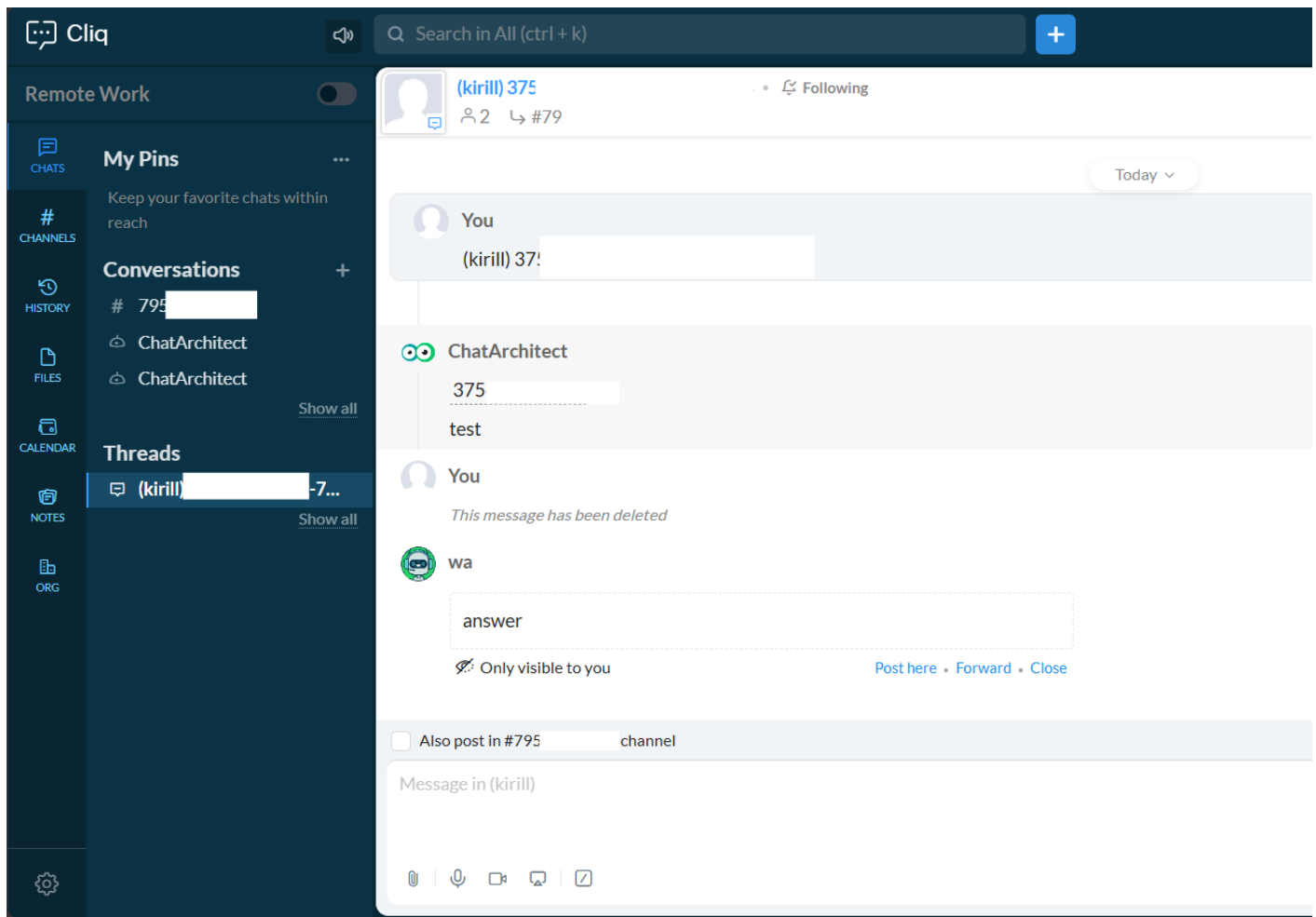
Type your whatsapp api password

.....

Add additional whatsapp account

Save settings

9. Next, write to your connected WhatsApp Business API number from your personal WhatsApp. It will be displayed in threads.



How to reply

1. You can reply by using **/wa** +your_text



(kirill) 375

0430024 • Following

2

Today ▾



You

(kirill) 375



ChatArchitect

375

test



You

This message has been deleted



wa

answer

Only visible to you

[Post here](#) • [Forward](#) • [Close](#)

☐ Also post in #79 channel

/wa message that you want to send

2. You can **quote** client's message

(kirill)

2 7

Following

Q

X

You

(kirill) 375 -795

Today

ChatArchitect

375

test

You

This message has been deleted

wa

answer

Only visible to you

Post here • Forward • Close

ChatArchitect

test

Also post in #795 channel

answer

Aa

How to create a template for WhatsApp Business API

Step-by-step instructions how to create a template in our app

1. First of all, you need to open wtargeted.com/ and click on the "Facebook Login" button or "Google Login" button



2. After you have logged in to your google \ facebook account, you must enter your PERSONAL phone number on which there is a WhatsApp application, a verification code will be sent to it (not to be confused with the number that you connected with us)

Your personal WhatsApp number in the international format
(not Whatsapp Business API)

Your personal WhatsApp number in the international format

Send a Code

Type the code here...

Check the Code

3. Put your App key and Secret and press "Yes, continue".

App key (required)

If you don't have a key, leave a request to
WhatsApp <https://wa.me/421233221242>

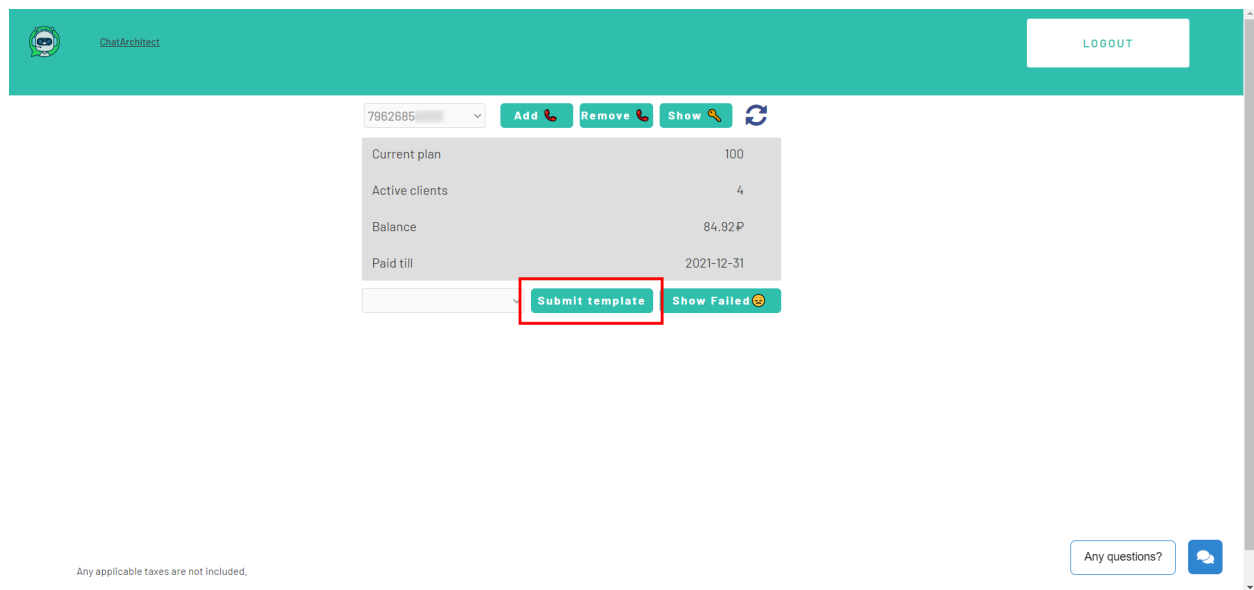
Type here...

Secret (required)

Type here...

Yes, continue

4. After this, an app menu will be opened. Click on the "Submit template" button.



5. Select the desired language and template type.

Write your message with variables in the first column. For example, "Hello, our employee will answer you as soon as possible. Ticket {{1}} has been created." Variables should be in braces {{}}.

Write a sample message replacing the variables with meaningful information in the second column. For example, "Hello, our employee will answer you as soon as possible. Ticket [999TTT] has been created.". The placeholder is square brackets [].

Then click "Submit Template".

English en



MARKETING



Template Format. Text with variables {{1}}, {{2}}, etc. Max length can be 1,024 characters.

Hello. Our employee will answer you as soon as possible. Ticket {{1}} has been created.

A sample message replacing the variables with a meaningful info. The placeholder is square brackets [].

Hello. Our employee will answer you as soon as possible. Ticket [999TT] has been created.

Buttons:

☒ 0

☐ 1

☐ 2

☐ 3

Submit Template

6. After review (it may take from few minutes to 24 hours), your template will appear in "Approved templates".

 ChatArchitect

LOGOUT

796268

AddRemoveShowRefresh

Current plan	100
Active clients	4
Balance	79.89P
Paid till	2030-12-31

Approved templatesSubmit templateShow Failed

Hello, our employee will answer you as soon as possible. Ticket {{1}} has been created.

Hi, {{1}}.
You are welcome!

Здравствуйте!
Ранее вы обращались к нам по заявке на {{1}}.
Пожалуйста, ваш вопрос еще актуален?

Any applicable taxes are not included.

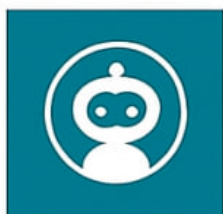
Any questions?

Don't forget to click on the "refresh" button.

How to improve your mailling

How to improve your Template

When preparing a mailing campaign, one of the most common questions is: *How can I create an effective newsletter without risking being blocked?* In this article, we'll share practical recommendations to help you achieve that.



CHATARCHITECT

How to improve your template for WhatsApp Business API

-  **Text volume** 20%
Send text no longer than 500 characters to increase engagement
-  **Variables** 40%
Use variables for more personalized addressing
-  **Media** 60%
Add an **Image** or **video** to attract the client
-  **Buttons** 80%
Add quick reply buttons or buttons with a link/number to increase the chance of client's response
-  **Button "Unsubscribe"** 100%
This button will help you reduce the likelihood of blocking

Text Length

Meta recommends keeping marketing templates under 500 characters to maximize customer engagement. The optimal range is 300–500 characters. In practice, this means keeping your message concise and focused: present the essence of your offer in just a few sentences instead of overwhelming readers with a wall of text.

Personalization with Variables

Personalization significantly improves the effectiveness of your campaigns. Using variables such as the customer's name is a simple but powerful way to make your messages feel more personal. After all, everyone appreciates being addressed directly.

Use of Media

Adding visuals such as bright images or short videos is a proven way to increase click-through rates. High-quality media design not only attracts attention but also serves as an important driver of conversions.

Action Buttons

Quick-reply buttons are an excellent tool for faster customer interaction. A single click is always easier than typing a response.

Hello. Please select the best day to check in.

10:40

← Monday

← Tuesday

← Wednesday

In addition, action buttons can redirect users directly to your website or phone number, making the communication process seamless and convenient.

Hello. Thank you for contacting our service. To go to the site or to call, click on the buttons below

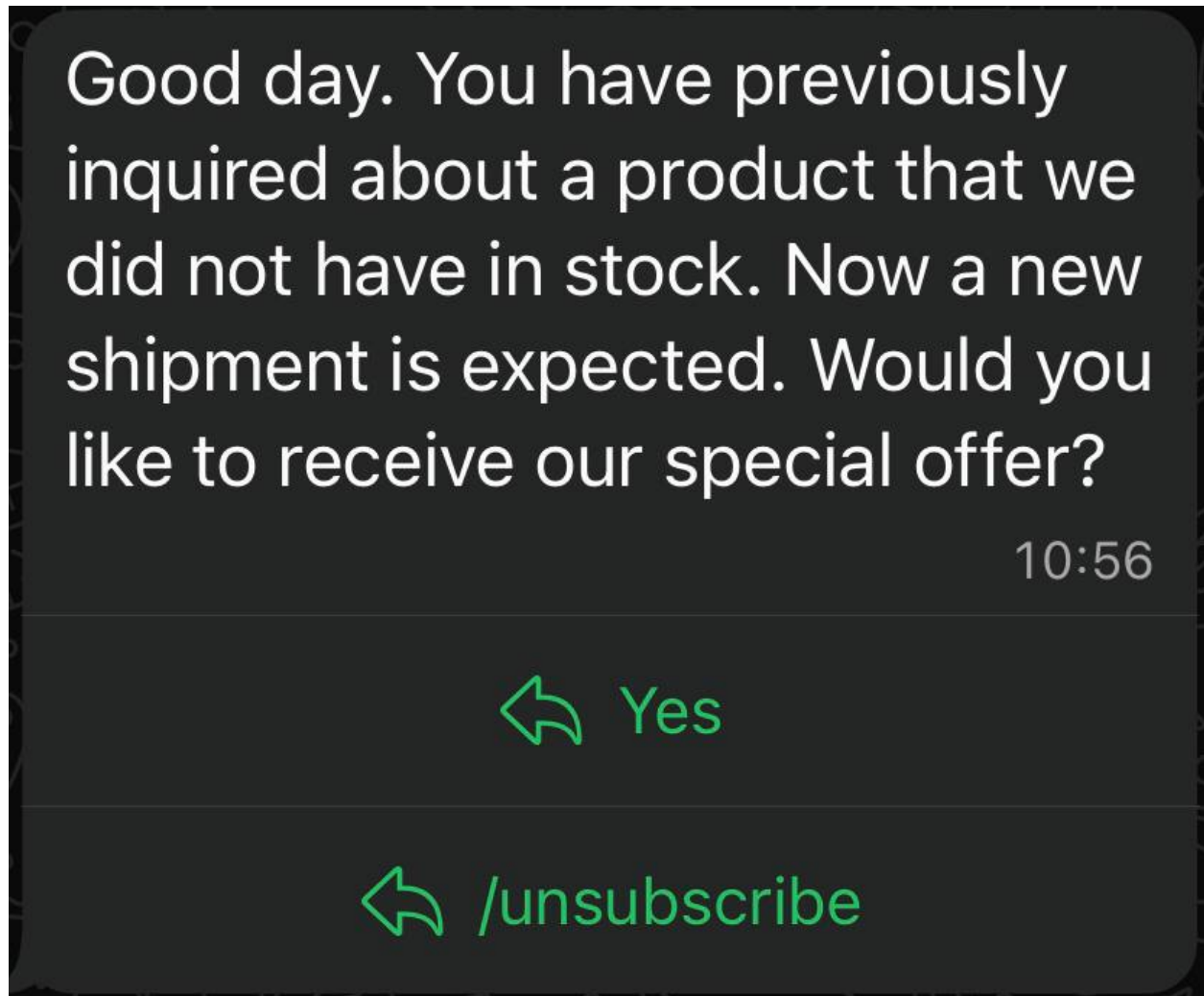
10:50

↗ Our website

☎ Call me

Unsubscribe Button

Meta recommends including an “Unsubscribe” button in mass-mailing templates, and we strongly support this practice. It’s much better to give customers an easy, native way to opt out than to risk complaints or negative feedback.



Conclusion

If you want your newsletter to deliver high engagement and strong conversion rates, make sure your template includes all of the elements listed above: concise copy, personalization, engaging visuals, action buttons, and an unsubscribe option.

Important Note: Templates containing images or call-to-action buttons (such as a website link or phone number) can only be approved via chat with our support team: wa.me/421233221242
wa.me/17377101702

How to initiate dialogue in Zoho

How to initiate dialogue in Zoho

1. First of all, you need to open your personal account <https://wtargeted.com/settings> and copy a template by using "**Copy**" button

The screenshot shows the Zoho Wtargeted settings interface. At the top, there's a dropdown menu with the value '447418610794' and buttons for 'Add', 'Remove', 'Show', and a refresh icon. Below this is a table of account statistics:

Current Plan:	100
Active clients:	2
Balance:	0.4€
Paid till:	2030-12-31
Free entry point:	0
User-initiated:	3
Marketing:	0
Authentication:	0
Utility:	2
Conversations cost:	0.0242€
Plan price:	15€

To the right of the table are buttons for 'Sender', 'Reports', 'Add balance', and 'Change tariff', along with a link 'Your ideas'. Below the table is a section for 'Approved templates' with a dropdown menu, a 'Submit template' button, and a 'Show Failed' button. A list of templates follows, each with a paper plane icon, a copy icon (highlighted with a red box and a red arrow), and a trash icon. The first template is titled 'Category: UTILITY' and contains a long alphanumeric ID and a welcome message.

Category: UTILITY dfq966ggzgtyubgfxjtaze
{{ee891ffc-aa3c-46b1-8b03-4a956f727c2d}}
Welcome {{[1]}} to Clix Technology Support WhatsApp. If you need support for any systems please simply request here and one of our engineers will be able to help you.

2. After that, go to Zoho, select the conversation you need to initiate, open it, and paste the template text into the chat thread (including the ID — it is only visible to you; the client will not see

it).

The screenshot shows a Telegram chat window. At the top, the header displays a profile picture, the name '(kirill) 375444611922-79500430024', and a 'Following' status. Below the header, a date separator indicates 'Saturday, April 25'. The chat history shows two messages: one from 'You' with the text '(kirill) 375444611922-79500430024' and another from 'ChatArchitect' with the text '375444611922 test'. A red arrow points from the 'test' message to a red-bordered box containing a message preview. This preview includes a checkbox labeled 'Also post in #79500430024 channel', a JSON object containing a long alphanumeric string, the text 'Hello! 🍌', a line 'You've reached us through the website chat 🌐', another JSON object containing the text 'Test', and the name 'WhatsApp Virtual Assistant' with a bot icon. At the bottom of the chat window, there is a toolbar with icons for attachments, voice recording, gallery, voice messages, and a link icon, along with text formatting options like bold, italic, and monospace.

How to initiate a dialogue with a client if no prior dialogue exists

1. First of all, you need to open your personal account <https://wtargeted.com/settings> and press "Sender" button

447

▼

Add

Remove

Show

↺

Current Plan:100

Active clients:2

Balance:

Paid till:

Free entry point:

User-initiated:

Marketing:

Authentication:

Utility:

Conversations cost:

Plan price:

Sender

Reports

Add balance

Change tariff

[Your ideas](#)

Approved templates ▼

Submit template

Show Failed

📄

🗑️

Category: UTILITY

dfq966ggzgtyubgfxjtaze

{{ee891ffc-aa3c-46b1-8b03-4a956f727c2d}}

Welcome {{1}} to Clix Technology Support WhatsApp. If you need support for any systems please simply request here and one of our engineers will be able to help you.

2. In the top field, select the template you want to send.
In the bottom field, enter the client's number you want to send it to.
Also, check the **"Copy text to CRM"** option.

WhatsApp Sender



{{ee891ffc-aa3c-46b1-8b03-4a956f727c2d}} Welcome {{[1]}} to Clix~

{{ee891ffc-aa3c-46b1-8b03-4a956f727c2d}}
Welcome {{[1]}} to Clix Technology Support WhatsApp. If you need support for any systems please simply request here and one of our engineers will be able to help you.

List of phone numbers (delimiters - new line, tab, "," ";" " "):

42121281671

☒ text

☐ image

☐ video

☐ file

Media URL https://

Send

☒ Copy text to CRM