

# 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 account settings page. At the top, there is a dropdown menu with the number '447418610794' and three buttons: 'Add', 'Remove', and 'Show'. Below this is a summary of account details:

Current Plan:	100	Sender
Active clients:	2	Reports
Balance:	0.4€	Add balance
Paid till:	2030-12-31	Change tariff
Free entry point:	0	Your ideas
User-initiated:	3	
Marketing:	0	
Authentication:	0	
Utility:	2	
Conversations cost:	0.0242€	
Plan price:	15€	

Below the summary, there is a section for 'Approved templates'. It includes a dropdown menu, a 'Submit template' button, and a 'Show Failed' button. A red arrow points to the 'Copy' icon (two overlapping documents) in the template management area. The template details shown are:

Category: UTILITY      dfq966ggzgyubgfxjtaze  
{{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 WhatsApp chat window. At the top, the contact is identified as '(kirill) 375444611922-79500430024' with a 'Following' status. A date separator indicates 'Saturday, April 25'. The chat history shows a message from 'You' and a message from 'ChatArchitect' with the ID '375444611922' and the text 'test'. A red arrow points from the 'test' message to the ID '375444611922'. Below this, a red-bordered box highlights a message template with the following content: 'Also post in #79500430024 channel', a long alphanumeric ID, 'Hello! 🙌', 'You've reached us through the website chat 🌐', '{{Test}}', and 'WhatsApp Virtual Assistant 🤖'. The bottom of the chat shows a text input field with icons for attachments, voice recording, gallery, emojis, and a link icon.

## 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

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**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

Revision #2

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