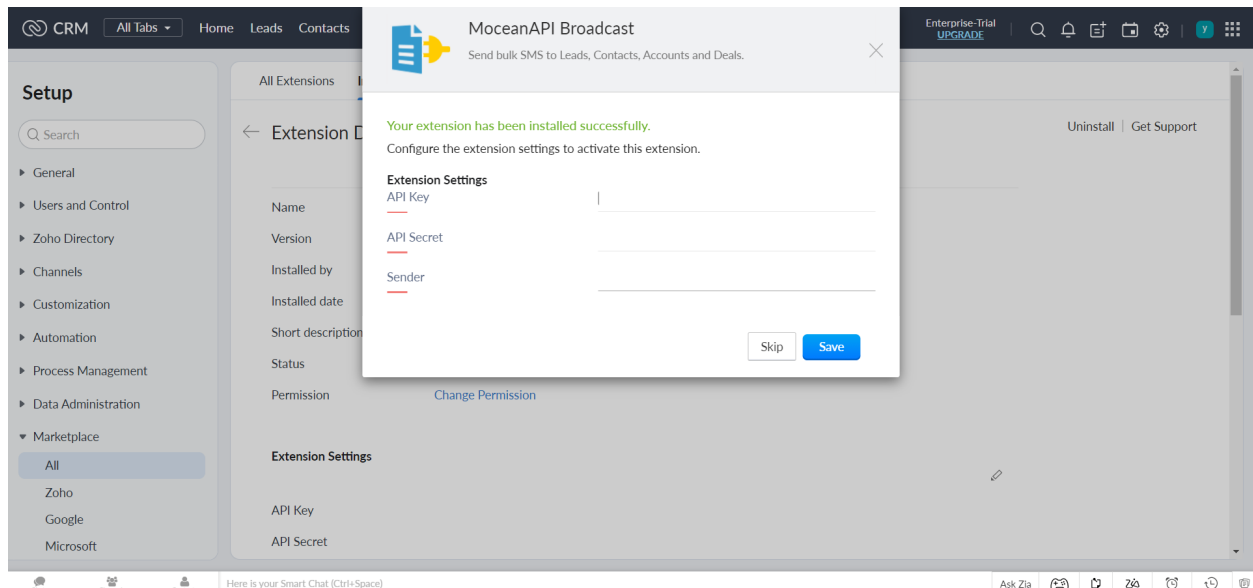


## MoceanAPI Broadcast Add-On

Best SMS Rates & Coverage. MoceanAPI Broadcast allows users to send SMS in bulk to Leads, Contacts, Accounts and Deals by using MoceanAPI service. SMS is still one of the best medium to use to reach your targeted audiences. Worldwide SMS coverage with lowest cost makes it suitable even for cross country audiences.

## Installation

Install the extension through Zoho Marketplace. After installation, users will be prompted to input API Key, API Secret and Sender. Users can skip first and configure the settings in the account configuration page later.



## Mocean Configuration

In the Mocean Configuration page, users can configure their API Key, API Secret and Sender. To find API Key and API Secret, go to <https://dashboard.moceanapi.com/>. For new users, register at <https://dashboard.moceanapi.com/register?fr=zohocrm>.

Home Leads Contacts Accounts Deals Activities Reports Analytics Products Mocean Configuration ...

Credit Balance EUR 7,7648

API Key  Your Mocean account API key.

API Secret  Your Mocean account API secret.

Message From  Sender of the SMS when the message is received at a mobile phone.

Defaults

Leads: Mobile  Contacts: Mobile  Deals: Account

Leads & Account: Select field Phone/Mobile as default to send SMS to.  
Deals: Select associated Account/Contact with deal as default to send SMS to.

Country  Optional: Select a default country to check for country code, phone number that have invalid format for selected country will not be sent SMS. Recipients that have Country information in Address Information will be checked with their listed country instead.

Ask Zia

If correct credentials are given, your credit balance will appear.

Users can set the default field (Phone or Mobile) to be sent SMS for Leads and Contacts. Accounts only has the Phone field by default. For Deals, users may choose between the associated Account or Contact to send SMS to. Below shows an example of the associated Account and Contact of a Deal:

## Hide Details

### Deal Information

Deal Owner MoceanAPI MoceanAPI

Deal Name Benton

Account Name [Benton \(Sample\)](#)

Type —

Next Step —

Lead Source —

Contact Name [John Butt \(Sample\)](#)

Modified By MoceanAPI MoceanAPI  
Mon, 26 Jul 2021 08:34 AM

Users can also select a default country to check for country code and format of phone numbers. However, if the selected recipient has inputted a valid country in their Address Information, checking the number with their country is in first priority. If the country inputted is invalid, the number will only then be checked with the default country.

If the number is considered invalid format for the default country, the SMS attempt is considered failed. If no default country is selected, only checking for recipients with valid country in Address Information is done.

## SMS Templates

Users can set up predefined SMS templates to be used later. Field tags can be inserted, the tags will be substituted by the details of the record selected during SMS sending. Note that only substitution is done for one module on each SMS, hence do not insert tags from different modules in one SMS template.

Home Leads Contacts Accounts Deals Activities

Create SMS Template [Edit Page Layout](#)

SMS Template Image

SMS Template Information

SMS Template Name

Template Content Hi {Leads.Full\_Name}, how are you doing?

Full Name Insert Accounts Tag Insert Contacts Tag Insert Deals Tag

Template Content

Hi {Leads.Full\_Name}, how are you doing?

Paste Pasted to main form.

Note: Do not include tags from different modules in one SMS template.

anAPI

Ask Zia

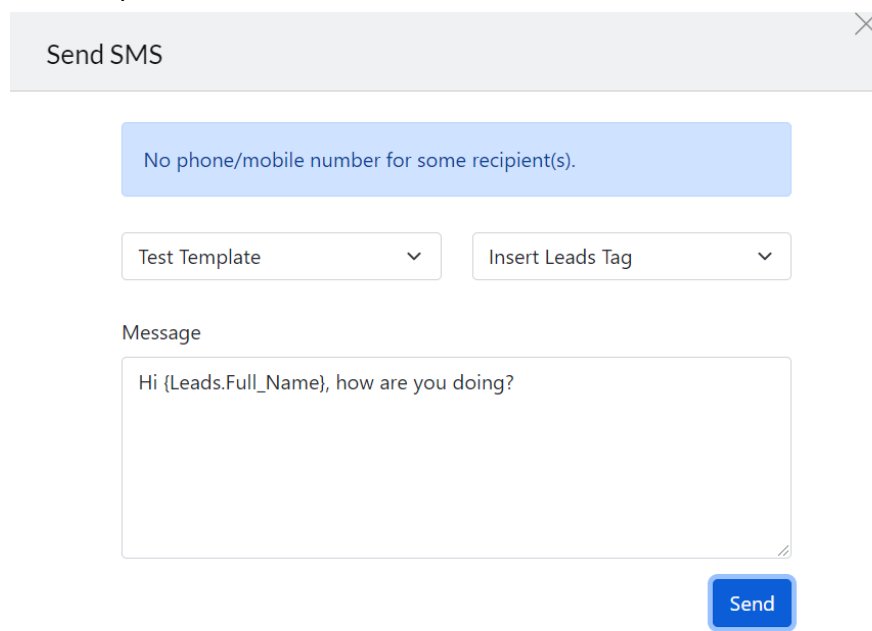
## Sending SMS

Users can send SMS to:

- Leads
- Contacts
- Accounts
- Deals

The phone number associated with the selected record will be sent the SMS, country code is required. Users are able to select which SMS template to be used, and also insert field tags of the module of selected record. For Deals, SMS will be sent to associated Account or Contact depending on user configuration at the Mocean Configuration page.

If the recipient of the SMS does not have the Phone or Mobile inputted, a alert bar will appear as below and no attempts will be done:



The screenshot shows a 'Send SMS' dialog box with a close button (X) in the top right corner. Inside the dialog, there is a blue error message box that says 'No phone/mobile number for some recipient(s)'. Below this, there are two dropdown menus: 'Test Template' and 'Insert Leads Tag'. Underneath these is a text area labeled 'Message' containing the text 'Hi {Leads.Full\_Name}, how are you doing?'. At the bottom right of the dialog is a blue 'Send' button.

The same applies for Deals with no associated Account or Contact:

Home Leads Contacts Accounts Deals Activities Reports Analytics Products SMS Transaction History ...

[Create SMS Transaction ...](#)
[Actions](#)

Total Records 72

**Filter SMS Transaction History by**

Search

**System Defined Filters**

- ☐ Touched Records
- ☐ Untouched Records
- ☐ Record Action
- ☐ Related Records Action
- ☐ Latest Email Status
- ☐ Activities
- ☐ Notes

**Filter By Fields**

- ☐ Account
- ☐ Contact
- ☐ Created By
- ☐ Created Time

<input type="checkbox"/>	Message ID All ▾	Created Time	Recipient Phone Number	Message	Response	Status
<input type="checkbox"/>	nytynl071515105 5442325.0002	Jul 15, 2021 08:03 AM	555-555-5555	Hi Kayleigh Lace (Sample), how are you doing?	Message Sent	Success
<input type="checkbox"/>	nytynl071515105 5531133.0003	Jul 15, 2021 08:03 AM	555-555-5555	Hi Yvonne Tjepkema (Sample), how are you doing?	Message Sent	Success
<input type="checkbox"/>	N/A	Jul 15, 2021 08:03 AM	555-555-5555	Hi Michael Ruta (Sample), how are you doing?	Authorization failed	Fail
<input type="checkbox"/>	N/A	Jul 15, 2021 08:03 AM	555-555-5555	Hi Chau Kitzman (Sample), how are you doing?	Authorization failed	Fail
<input type="checkbox"/>	nytynl071515105 6103545.0004	Jul 15, 2021 07:10 AM	555-555-5555	Testing	Message sent	Success
<input type="checkbox"/>	nytynl071515105 6592438.0001	Jul 15, 2021 07:10 AM	555-555-5555	Hi Theola Frey (Sample), how are you doing?	Message sent	Success
<input type="checkbox"/>	nytynl071515105 5442327.0002	Jul 15, 2021 07:10 AM	555-555-5555	Test message	Message sent	Success