

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 displays the Zoho account settings interface. At the top, there's a header bar with a dropdown menu showing '447418610794' and several action buttons: 'Add', 'Remove', 'Show', and a refresh icon. Below this, a table lists account details:

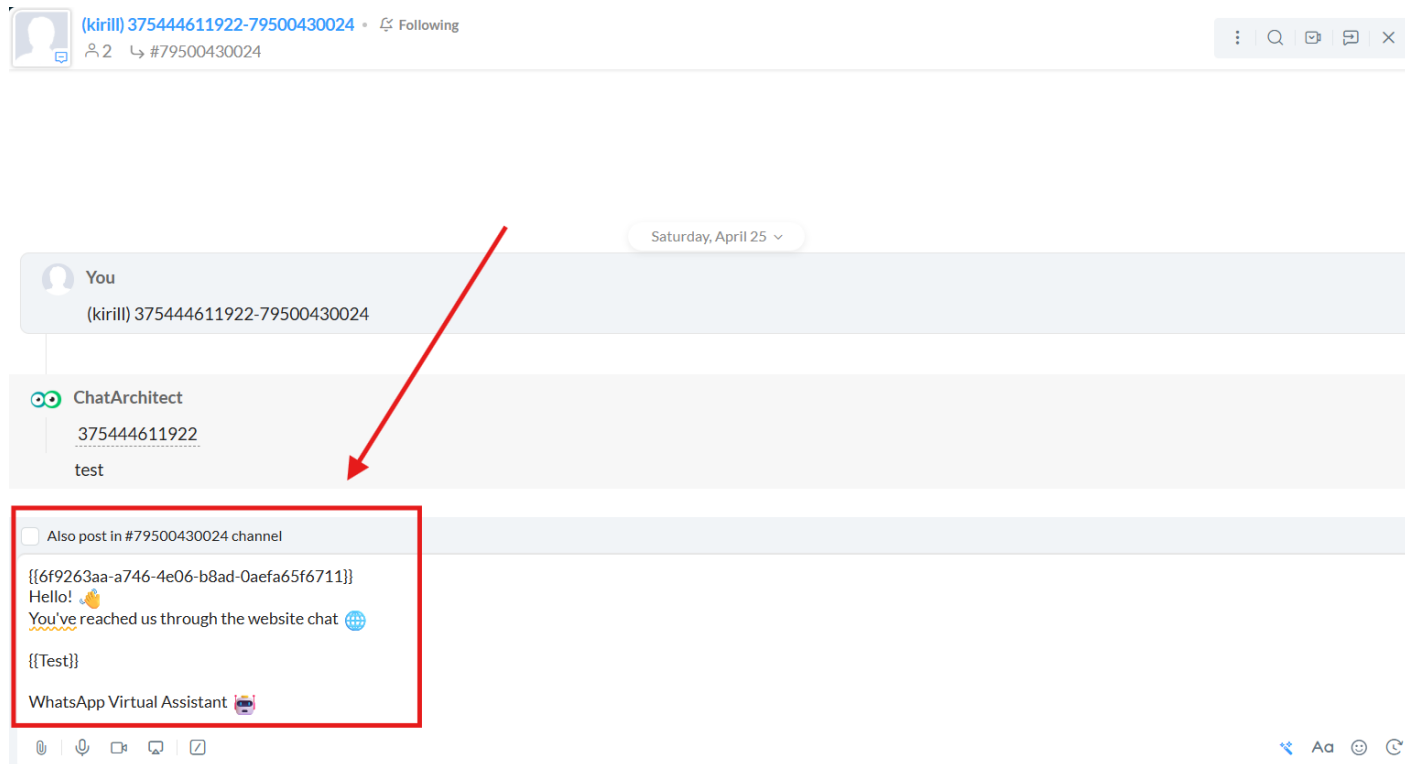
Current Plan:	100
Active clients:	2
Balance:	0.4€
Paid till:	2030-12-31
Free entry point:	0
User-initiated:	3
Marketing:	0
Authentication:	0
Utility:	2
Conversations cost:	0.0242€
Plan price:	15€

To the right of the table are several buttons: 'Sender', 'Reports', 'Add balance', 'Change tariff', and a link 'Your ideas'. Below the table, there's 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 'Copy' icon (a document with a plus sign), a 'Category' (UTILITY), and a unique ID (dfq966ggzgyubgfxjtaze). The first template's content is partially visible: '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.'

A red arrow points to the 'Copy' icon of the first template. A vertical scrollbar is visible on the right side of the template list.

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).



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

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