Pinnacle <SMS > Zoho CRM Setup Guide

Revision Number	Revision Date	Affected Sections & Summary of Change	Prepared By	Reviewed By	Approved By
1.0	15-10-2026	ZOHO CRM	Francis R	Francis R	Raghuraman M

This policy will be reviewed for continued completeness, relevance, and accuracy within 1 year of being granted “final” status and at yearly intervals

The version control table will show the published update date and provide a thumbnail of the significant change.

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1.Overview

- Install the Pinnacle SMS app in Zoho and configure the DLR URL with the Pinnacle team.
- Create a Pinnacle SMS account configuration in Zoho using your Pinnacle credentials.
- Send SMS manually from individual Lead, Contact, or Account records.
- Set up Zoho workflow rules to send SMS automatically on trigger events.

> **Why the order matters**
>
> The DLR URL is generated only after the app is installed, and Pinnacle needs it configured before any delivery reports can be received. Complete Part A fully before sending any messages.

2.Before You Start

- ➔ A Zoho CRM account with permission to install marketplace apps and create workflow rules.
- ➔ A Pinnacle SMS dashboard account with access to your Sender ID, Access Key, and Entity ID.
- ➔ A DLT-approved message template ID and its approved message content, copied from the Pinnacle dashboard.
- ➔ Connect with the Pinnacle team to share the DLR URL with them during setup.

3.Part A — Install the App and Configure the DLR URL

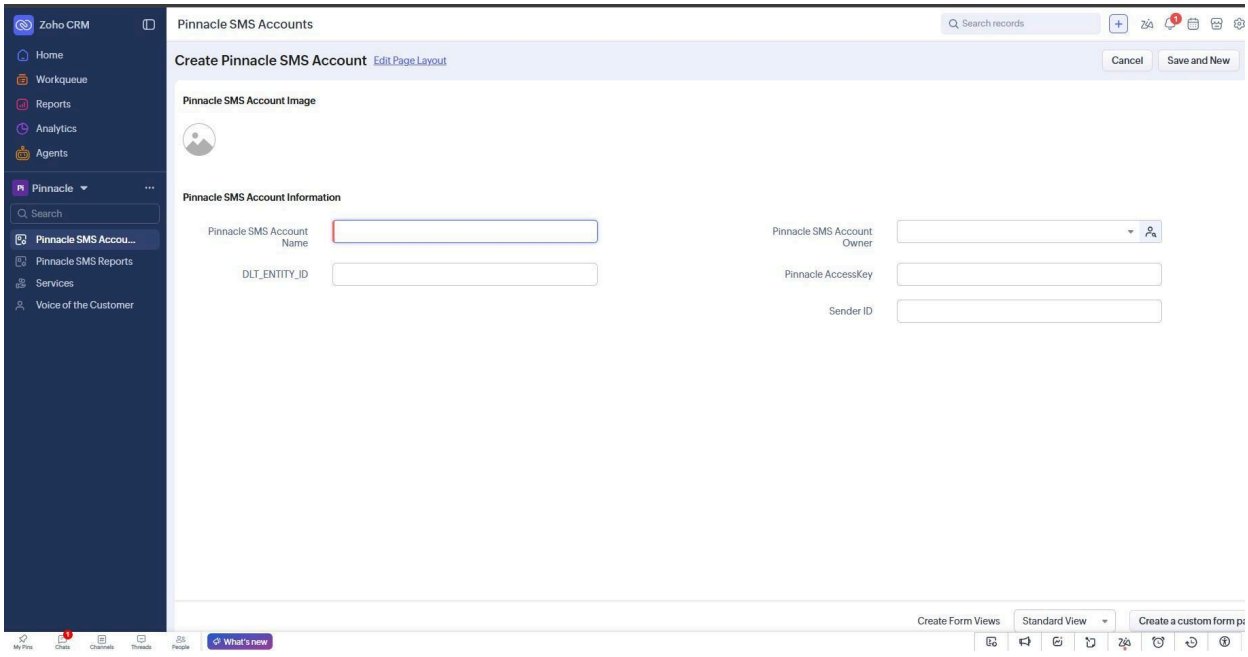
- Log in to your Zoho CRM dashboard and install the Pinnacle SMS app from the marketplace.
- On installation, a DLR URL is generated and displayed on the screen.
- Share this DLR URL with the Pinnacle team so they can configure it on their end.

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4.Part B — Create the Pinnacle SMS Account Configuration

- In the Pinnacle SMS app within Zoho, click Create Pinnacle SMS Account.
- Enter the Sender ID, Access Key, and DLT-Entity ID. These values are available in your Pinnacle dashboard.
- Enter a Configuration Name of your choice to identify this account.
- Save the configuration.

Field	Value
Sender ID	<insert your Pinnacle Sender ID here>
Access Key	<insert your Pinnacle Access Key here>
Entity ID	<insert your Pinnacle Entity ID here>
Configuration Name	Any name you choose, e.g., "Main Pinnacle Account"



5.Part C — Send SMS from Lead, Contact, or Account Records

- Open the particular Lead, Contact, or Account record you want to message.
- Click the button at the top right of the record and select Send Pinnacle SMS from the dropdown.
- In the pop-up window, select the phone number field to send the SMS to.
- Select the Pinnacle account configuration you created earlier.
- Enter the DLT Template ID, available from your Pinnacle dashboard account.
- Enter the message content, copied from the Pinnacle dashboard.
- Use Add Token to insert dynamic variables into the message where needed.
- Click Send. The message report becomes available both in the Pinnacle SMS report and on the record's page.|

Field	Value
Phone Number Field	Field on the record containing the recipient number
Account Configuration	The Pinnacle account created in Part B
DLT Template ID	<from Pinnacle dashboard>
Message Content	Copied from the Pinnacle dashboard
Dynamic Variables	Optional, added via Add Token

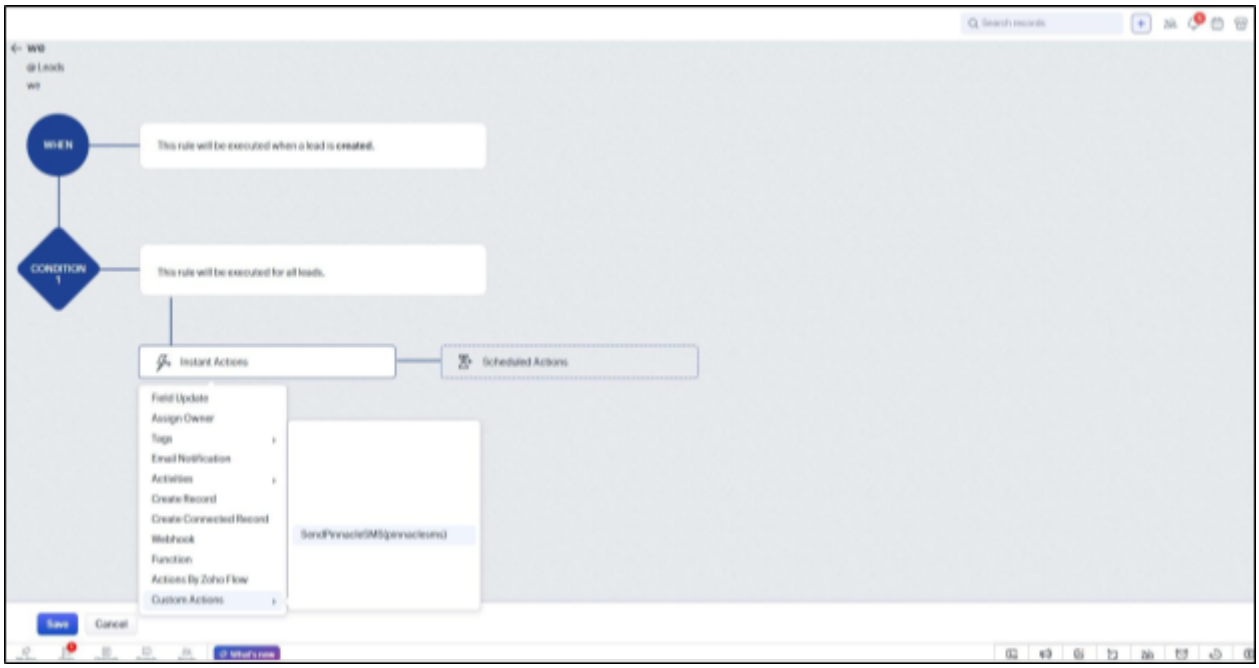
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6.Part D — Automate SMS with Workflow Rules

- Go to Workflow Rules, natively available in Zoho CRM, and click Create Rule.
- Select the module, then enter a rule name and description.
- Configure the rule and record action as required for your use case.
- In the Action block, select Custom Action, then choose Send Pinnacle SMS.
- Configure the SMS action the same way as the individual send in Part C (phone field, account configuration, DLT template ID, message content, tokens).
- Save the rule.

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Common mistake

The workflow SMS action uses the same configuration fields as a manual send in Part C. Skipping the DLT Template ID or leaving the wrong account configuration selected will cause the automated send to fail silently until checked in the Pinnacle report.

7.Validate the Setup

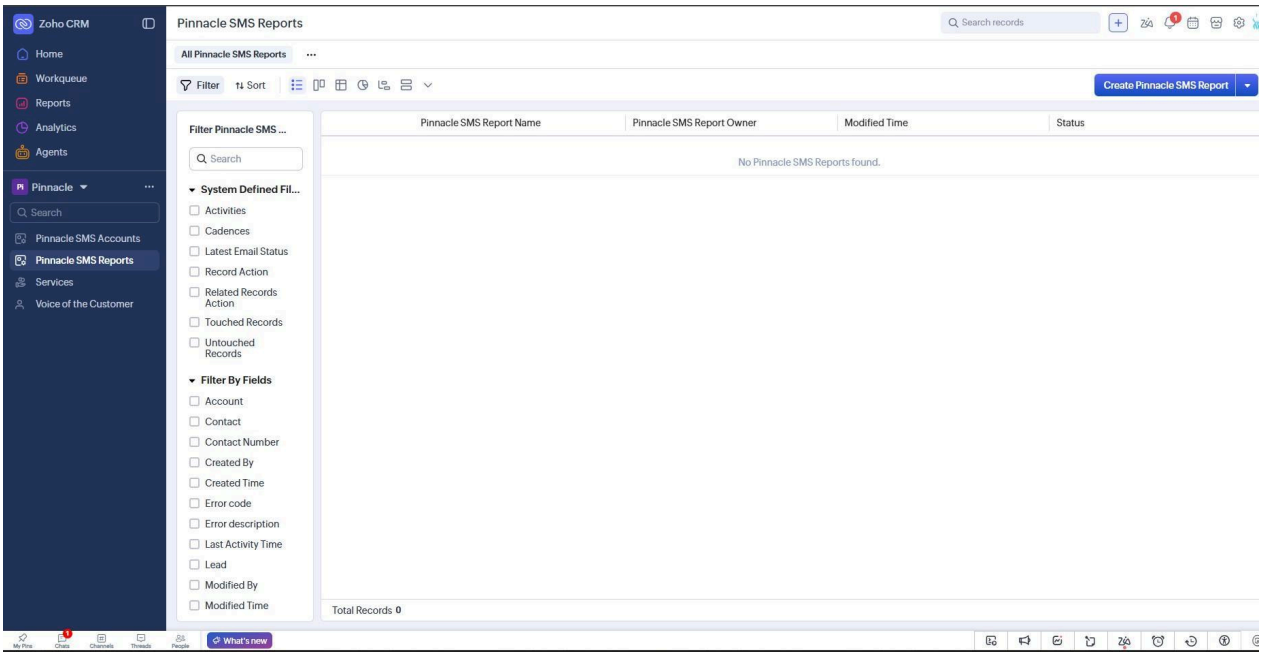
➔A test SMS sent from a Lead, Contact, or Account record appears in the Pinnacle SMS report.

➔ The same test SMS also shows a report entry on the individual record's page.

➔A workflow rule with the Send Pinnacle SMS action triggers correctly, and the resulting message shows in the Pinnacle SMS report.

➔Delivery status (DLR) updates are received back in Zoho, confirming the DLR URL was configured correctly by the Pinnacle team.

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Appendix — Quick Reference

Item	Where to Find / Use It
DLR URL	Generated on app install; share with Pinnacle team
Sender ID / Access Key / Entity ID	From Pinnacle dashboard; entered in Part B
DLT Template ID	From Pinnacle dashboard; required per SMS send
Manual send location	Lead / Contact / Account record → top-right button → Send Pinnacle SMS
Automated send location	Workflow Rules → Custom Action → Send Pinnacle SMS
Reports	Pinnacle SMS report, and on each record's page

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