

Horizon

Integrator Zoho Add-in Guide



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Introduction

Zoho CRM 4 Add-in Guide

This document will guide you through configuration and basic use of Horizon Integrator's Zoho CRM Add-in. It is expected that you are already familiar with the Address Book, Call History and Preview window, and the basic concepts of integration and screen popping using the Add-ins. See the full user guide for these topics.

Zoho CRM and the database used to store your contact data should already be installed and working normally before proceeding with this integration.

Integrator must also be installed already with the initial configuration completed. If this is not the case, please see the full user guide or consult your Horizon administrator.

Information You'll Need;

- Windows account username and password
- Zoho Authorisation token, User and username

 **Instructions on where to find this information are given below if required**



Configuration



Configuration

User/Email:

Password:

Auth token:

Modules:

- Leads
- Accounts
- Contacts
- Cases

On the 'Configuration' group, enter your Zoho CRM account username or registered email address and your password.

Once your details are in place, click the 'Regenerate' button to automatically generate and enter your Zoho authentication token. The token that is generated is

what authenticates you, not the username/email and password; they are used purely to generate the authentication token so changing them after generating the token has no effect. To change accounts, you must create a new Zoho CRM integration by clicking the "(Add new)" button and delete the unwanted Zoho CRM integration.



User/Email: john.smith@examplecompany.com

Password: *****

Auth token:

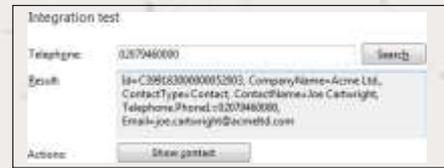
Note: this method of authentication replaces the 'API Key' method which has been deprecated by Zoho as of 30/6/2012. Users with Zoho CRM integrations using the 'API Key' will need to update the client software, then create a new Zoho CRM integration and delete the old, outdated integration.

In the 'Modules' section, select the Zoho CRM contact types you want to be used by ticking the corresponding boxes.

Click the 'Save' button to store and apply your settings.

Testing

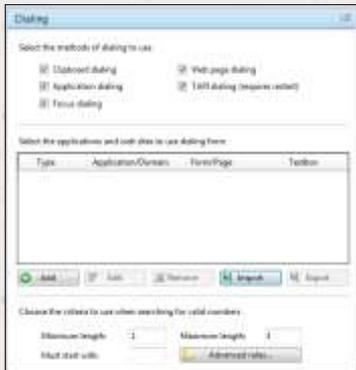
To test if the configuration worked, enter a phone number from your Zoho CRM account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.



If the test does not work or you get an error, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.



Dialling configuration



To dial out from within Zoho CRM, dialling needs to be configured correctly.

Right-click the tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up, this will open the 'Configuration' screen. In the 'General' group, click on the 'Dialling' option.

Make sure the 'Web page dialling' box is ticked. This converts the telephone numbers identified on web pages into hyperlinks you can click to dial the number.

You can refine the criteria used to identify telephone numbers. Enter the appropriate number of digits into the 'Minimum length' and 'Maximum length' text boxes and specify a prefix that identifies telephone numbers (if there is one) by entering it in the 'Must start with' box.

If you would like to be able to dial directly when you are entering new information in Zoho CRM e.g. on the new contact page, we need to carry out some further configuration so click the 'Add' button to start the Dialling wizard.

The first question in the wizard asks you about the type of application you want to dial from. Select the 'The application runs inside a web browser' option. Click the 'Next' button.



We've already covered converting identified numbers into hyperlinks so select the 'Text boxes' option on the second screen of the wizard and click the 'Next' button.

Open your Zoho CRM account in Internet Explorer and find the text box you want to dial out from, it needs to have a number in it already so add a temporary one if you need to. Copy or make a note of the telephone number currently displayed in the text box and leave the web page open.



Back in the wizard, paste or type the number into the 'Number to search for' box and click the 'Detect' button.



The wizard will search the current web page for the telephone number you entered and, once found, display the details. Click 'Next' and then 'Close'.

You can add as many textboxes as you like, just start the process by clicking the 'Add' button and working your way through again.

Click 'Save' to store your settings and you're ready to go.

Now, a clickable icon is placed at the end of any textboxes you have configured and you just click on it to dial the number in the textbox. Refresh the page in Zoho CRM to see it.



Functionality

When a call comes in, the 'Preview Window' will pop up and display the phone number that is calling. If the caller is recognised as one of your contacts from Zoho CRM, their details will also be displayed and you can 'pop' their contact record by clicking the 'Zoho CRM' button in the window.



You can also pop recognised callers' contact records by clicking the 'Zoho CRM' button on the 'Phone Window'.

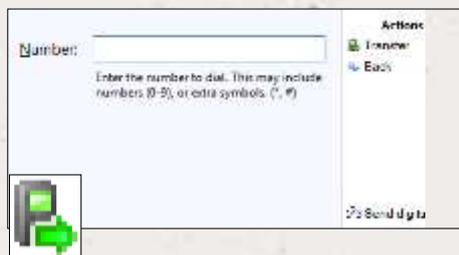


Calls can be deflected to another extension before answering them by clicking the 'Deflect' button, entering the extension number and clicking 'Deflect' again.

To answer a call on either the 'Preview' or 'Phone' window, you just need to click the 'Answer' button.



To speak to a colleague during an active call, click the 'Consult' button, enter the extension number and click 'Consult' again; the active call is automatically held. To end the call to your colleague and resume the held call, click 'Cancel'.



To transfer a call to another extension, click the 'Transfer' button, enter the extension number and click 'Transfer' again.

