Horizon

Integrator CRM Zoho Phonebridge Add-in Guide

Contents

Introduction

This page will guide you through configuration and basic use of the Horizon Integrator Zoho PhoneBridge 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 'User Guide' for these topics.

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

Horizon Integrator must also be installed already with the initial configuration completed. If this is not the case, please see the 'Technical Installation Guide' or consult your system administrator.
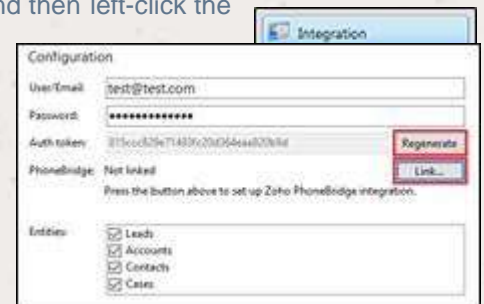
Information You'll Need

Windows account username and password

Zoho Auth token, User/Email and password

Configuration

Right-click the Horizon Integrator 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 'Integration' area, click the 'Add new' button, select 'Zoho PhoneBridge' from the 'Type' dropdown box and then click the 'Set' button.

On the Configuration group, enter your Zoho PhoneBridge 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 PhoneBridge integration by clicking the "(Add new)" button and delete the unwanted Zoho PhoneBridge integration.

Select 'Link' to start the validation process.

You will now need to log in to Zoho to verify Horizon Integrator can use the PhoneBridge.

If the Zoho user has Two-Factor Authentication enabled, they need to create an Application Specific Password as detailed below, and enter that instead of their actual password into the Zoho addin configuration. Don't forget to remove any spaces that may appear in the Application Specific Password:

Log in to Zoho PhoneBridge

Open https://accounts.zoho.com

In the Zoho Accounts Home page, click Two Factor Authentication

In the Two Factor Authentication page, click on the Manage Application Specific Passwords

In the Application Specific Passwords pop-up, specify these details:

Device or App Name

Current Password

Click Generate

Note: This method of authentication replaces the 'API Key' method which has been deprecated by Zoho as of 30/6/2012. Users with Zoho PhoneBridge integrations using the 'API Key' will need to

update the client software, then create a new Zoho PhoneBridge integration and delete the old, outdated integration.

Cache allows for data to only be updated (with only 4 searches/credits used to create the cache file) every 'X' number of minutes. Tick the check box to enable this option and set the duration in minutes between caches in the 'Frequency' text box. Any new contacts added between caches will not be seen by Horizon Integrator until the next scheduled cache.

Advisory

Zoho PhoneBridge API Usage Limits

The Zoho API has limits, as detailed here: https://www.zoho.com/crm/help/api/api-   limits.html Therefore, on high usage sites it is recommended that the Zoho addin is configured to use 'Caching'.

Live search limitations

Another reason to use cached mode instead of live mode is because the Zoho API method only allows one field to be queried in each search. This means the following limitations apply:

When searching for a telephone number in Leads and Contacts, only the phone field is searched.

When searching for a name in Leads, only the Lead's last name field is searched.

When searching for an address in Accounts, only the Billing City is searched. When searching in Contacts, only the Mailing City is searched.
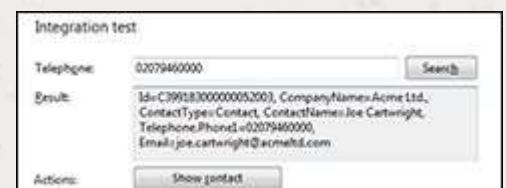
In the 'Modules' section, select the Zoho PhoneBridge account contact types you want to be used by ticking the corresponding boxes.

Click the 'Save' button to store the information you've entered and apply the configuration.

Testing

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

The test area results should look similar to the results showing in the image here. If the test does not work, 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.

Functionality

You will see that when the vieiwng contacts on Zoho CRM, a new icon will appear on the 'Phone' field.

When clicked, this will initiate a call through to the Horizon Integrator software.

You will now be provided a Pop-up within Zoho PhoneBridge. Here you can affect the call, using the commands on the screen.

Dialing configuration

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

Right-click the Horizon Integrator 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 'Dialing' option.
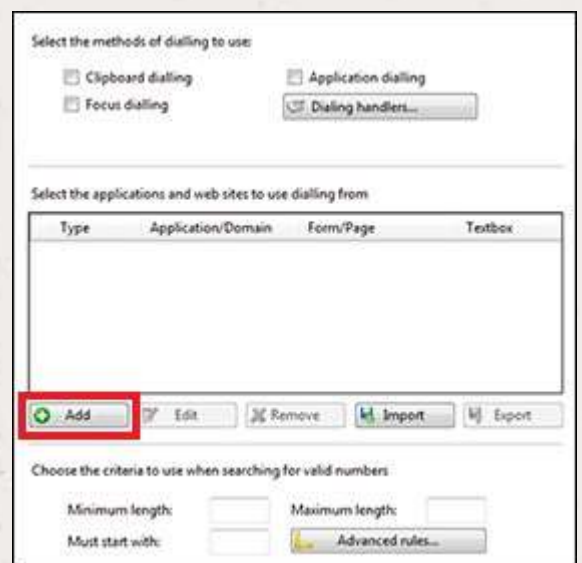
Please see the following link to make sure that the web dialing feature is enabled before progressing: http://integrator.unlimitedhorizon.co.uk/help/help.php?item=1119&lang=uk

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, for example on the new contact page, we need to carry out some further configuration. Click the 'Add' button to start the Dialing 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.
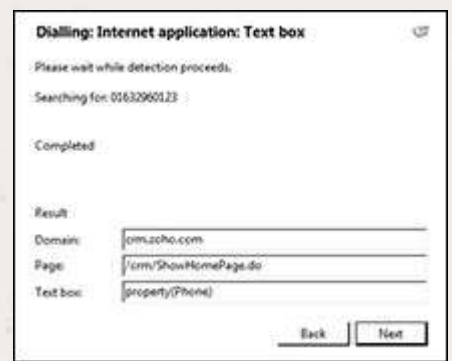
Now, a clickable icon is placed at the end of any textboxes you have configured and you just click on it to dial the number in the textbox. Refresh the page in Zoho CRM to see it in action.