VozTelecom for Zoho

Integrate your Zoho apps with Centrex - VozTelecom's cloud PBX

Introduction:

With VozTelecom's cloud PBX integration in Zoho, you'll improve your management and commercial attention to your customers, through features such as direct dialing in one click, incoming call information via pop-up, and the registration of all calls in the customer's file.

Access:

The Zoho user must log in to their Zoho product, through the website: www.zoho.com

Management: Customer, Access URL

Each Zoho user must access a unique URL to authorise Zoho to integrate with Centrex. These URLs are generated by VozTelecom and delivered to the customer via email.

Each user must access their assigned URL and perform the following steps. Obtain authorization code.
When entering the assigned URL, the following interface informs us of our authorisation code that we will have to enter later in Zoho:

Write down the code and click on AUTHORIZE to automatically open the Zoho interface in another browser tab.

Log in to Zoho

In the new tab, Zoho will ask us for our login details.

Enter authorisation code

In the next interface, Zoho asks for the code obtained in the previous step: Get authorisation code. If we don't have it written down, we can go back to the other browser tab to consult it. Click on Verify to verify the authorisation code and continue with the following steps.

Authorise VozTelecom to connect with Zoho

Zoho will identify the code given, and ask the user to authorise VozTelecom to interact with its platform.
When you press Accept, a confirmation message will appear:
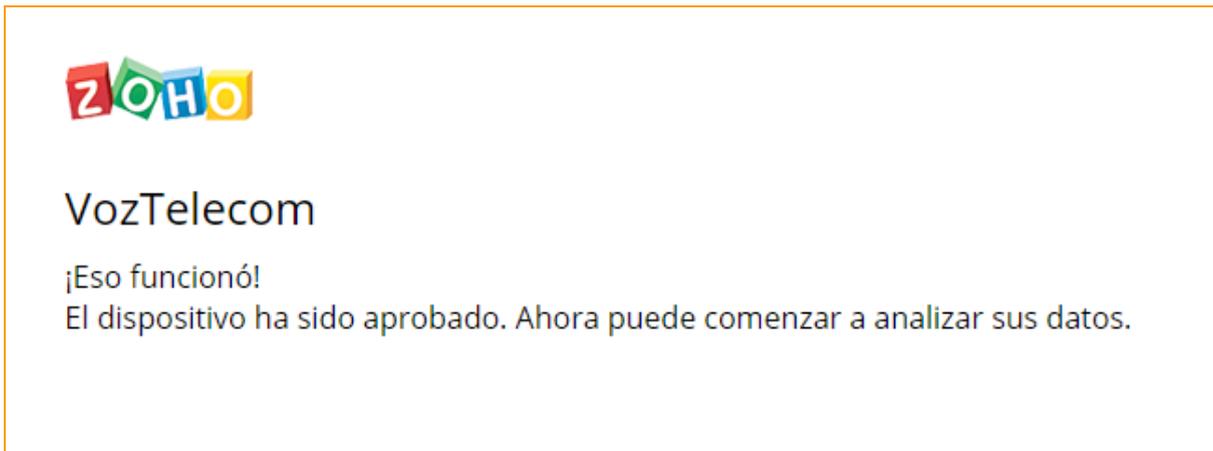
We can close the tab and return to the VozTelecom tab.

Activate functionalities

Once all the management with Zoho is done, click again on the AUTHORIZE button.

The page will reload showing the available functionalities:

VozTelecom - Zoho Integration

Gestiona la integración desde esta página

Activa las notificaciones de llamada

Cuando actives este servicio recibirás notificaciones en Zoho de las llamadas entrantes y salientes.

ACTIVAR

Activa el click to call

Con el Click to Call podrás lanzar llamadas desde Zoho de una forma rápida y cómoda. Requiere la notificación de llamadas

By clicking ON under Call Notifications, you will receive notifications of incoming and outgoing calls from the user's extension.

A confirmation pop-up will appear on the screen, click OK in the bottom right corner to close.

Hecho!!

Tu petición se ha procesado correctamente. La página se recargará en un instante

OK

Tu petición se ha procesado correctamente. La página se recargará en un instante
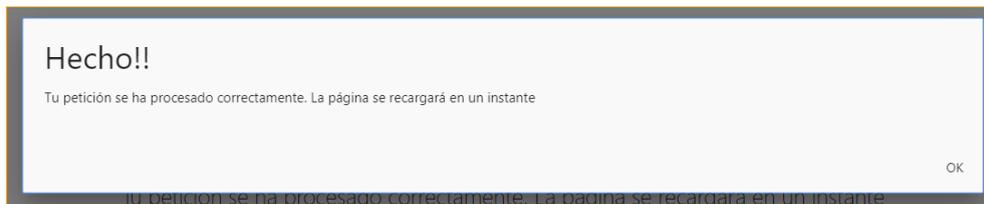
Once the notifications have been activated, we can activate or deactivate the click to call.

- Notifications: informs us of incoming or outgoing calls via a pop-up window.
- Click to call: allows you to make calls with a click, without having to enter the entire number to call.

VozTelecom - Zoho Integration

Gestiona la integración desde esta página

Desactiva las notificaciones

Dejarás de recibir notificaciones de llamada.

DESACTIVAR

Desactiva el click to call

Ya no podrás lanzar las llamadas desde Zoho pero podrás hacerlo desde tu teléfono.

DESACTIVAR

Once the activation is done, you can start using the features of the integration in Zoho.

Modify integration

To activate or deactivate the notifications or the click to call, it is necessary to re-enter the URL without the need to re-authorise with Zoho.

Integration functionalities

The functionalities of the integration are detailed below by means of examples so that you can get to know how they work in depth.

Receiving calls

When receiving calls, a notification pop-up will appear indicating the number that is making the call as well as the name of the contact if it is registered.
Until we pick up the phone with our device configured to receive calls, the message "Calling..." will appear.
In the incoming call notification pop-up, clicking on the caller's name opens the customer's file to leave notes.
Once the call is picked up (answered by the user) the seconds counter of the call in progress starts. While the call is in progress or after the call has ended, it is possible to add a comment to the call in the "Call Description" section.
Once the call has ended, we can select "Finished" and in the contact's own file we can view the call history in the "Closed activities" or "Open activities" tab, depending on whether we have successfully completed the call or whether a reminder has been included to make the call again.
It is also possible, once the call is finished, to select the "Add" section and we will see the "Call", "Event" and "Task" options in the drop-down menu.
We can generate reminders or follow-ups for each call, directly from the pop-up window. The following follow-ups are allowed:

- **Call:** schedule another call for another time. This call can then be later on the home screen (by configuring the views) or in the Zoho calendar.
- **Event:** in case a meeting is generated from the call, it is possible to directly schedule it.
- **Task:** if we generate a task we set an action to be carried out in the future. This task will be a reminder that will be triggered on the indicated day. If required, it is also

possible to set a reminder reminder and an alert via pop-up or email. Tasks do not end until the user marks them as "Completed".

Making calls

By accessing the Contacts module you can call your saved contacts. It is also possible to call potential customers (Leads) and in all the sections where there is a telephone number or in the option "Call now".
Automatically on the right side of our screen we will see a pop-up with the call information such as contact name, elapsed call time, contact owner, phone number as well as additional information from the contact sheet.

While the call is in progress or after the call has ended it is possible to add a comment to the call in the "Call Description" section or by selecting the icon next to the contact name "Add call details".

A new window will open and you can select different options regarding the reason for the call as well as the purpose and outcome of the call.

In the outgoing call notification pop-up, clicking on the caller's name opens the customer's file to leave notes.

Once the call has ended, we can select "Finished" and in the contact's own file we can view the call history in the "Closed activities" or "Open activities" tab, depending on whether we have successfully completed the call or whether a reminder has been included to make the call again.
You can find it as a shortcut in the "Related list" or, once you have entered the contact's file, by going through each menu until you find "Closed activities" or "Open activities".

Call recordings

To view the call recordings, you need to access the contact's file and view the "Closed activities" or "Open activities" section and click on one of the recorded calls, whether received or made.
The activity will open with additional information such as the time and start of the call as well as the duration of the call, etc... We will see the Voice Recording section which will allow us to listen to the recording by clicking on the "Play" icon, increase or decrease the volume and download it in MP3 format.