

Zoho Extension integration manual

Version 1.2

Introduction

The CloudCTI for Zoho Extension integration offers caller recognition, click-to-dial and screen pop from within the Zoho environment, without the need of any locally installed software.

Key features

- Click-to-dial enabled for every phone number field in Zoho.
- Caller recognition on incoming calls.
- Automatic opening of caller info tab.
- Automatic logging of calls in Activities tab with possibility to add notes.

Getting Started

Upload and installation

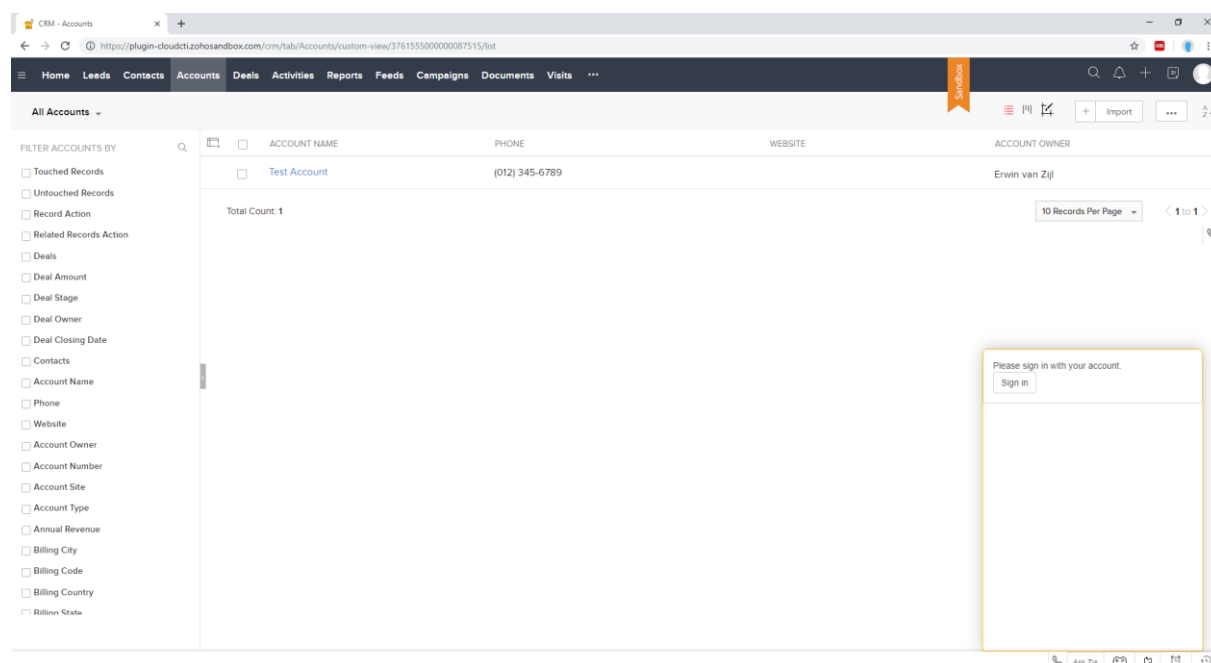
Download the CloudCTI for Zoho extension from the Zoho Marketplace:

<https://marketplace.zoho.com/crm/cloudcti-for-zoho-crm>

When the process is complete, the extension appears in the list of installed extensions.

Using the Extension




Click the 'phone' icon at the bottom of the page to open the extension.



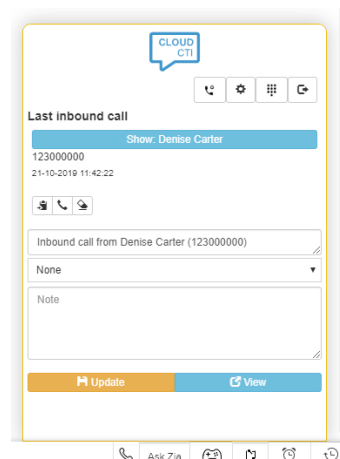
Sign in with your credentials to connect to your phone platform.


Inbound caller recognition

On an incoming call, the extension shows the name of the caller if the number is recognized. By default, it opens the caller's contact page in the current browser tab. Below the call info are three buttons with the following functions:

-  copy the number to the clipboard.
-  call back the number.
-  clear the call.


If the caller has multiple matches, all are shown in a dropdown list with a button 'view caller'. If there is one single match, the button shows the name of the caller.



The default action to open the caller's info in the current tab can be disabled by clicking the cog wheel button on top  and selecting 'No action' on an incoming call. It is also possible to choose to open the caller's info in a new browser tab, to do this select 'Open caller in new tab'.

A note and call purpose can be added to the automatically created call log, also the title can be changed. When there are multiple matches the contact selected when clicking the 'Update' button will be matched to the log. To view the log you can click the 'View' button.

Outbound dialing

When a user is signed in, all phone numbers automatically show a phone icon. Clicking the icon sends the 'make call' command to the call center. It is also possible to dial a number manually via the extension's dial pad. To do this, open the dial pad by clicking the  button on the top and use the digits or paste a number into the edit box.

