How to configure caller recognition and screen-pop for:

Zoho CRM

Supported versions: Zoho CRM
Contact replication method: REST API
Screen pop method: Url

Prerequisites

The Zoho CRM API is used for contact data replication. To enable this, the Recognition Update service must be authorized via OAuth 2.0 to access Zoho CRM.

Notes

Dial from Zoho CRM is easy, just click on a phone number hyperlink to dial. The first time your browser may request your permission to associate 'skype:' uri links with MakeCall.exe. Please note that in case Skype or MS Office 365 / Lync is installed, the skype uri handling is overridden by these applications. In any case you can select a phone number and dial with the client hotkey (PAUSE).
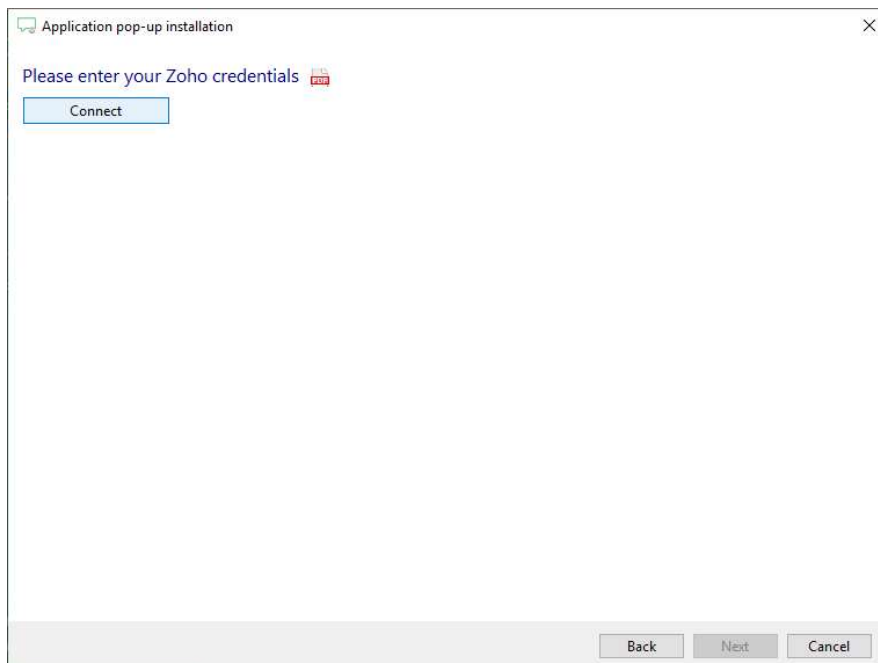
|	
Rating:	
Phone:	+31 (0) 12 3456 789
Fax:	+31 (0) 12 3456 000
Website:	www.zoho.nl

Configuration steps

1) Start by clicking 'add recognition' in the Recognition Configuration Tool (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'Zoho CRM', as shown below.
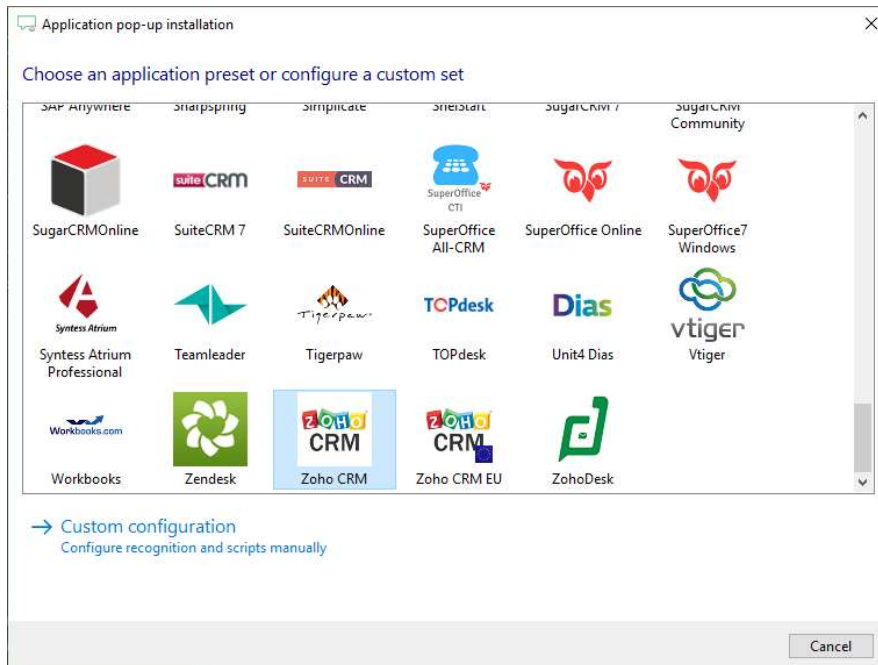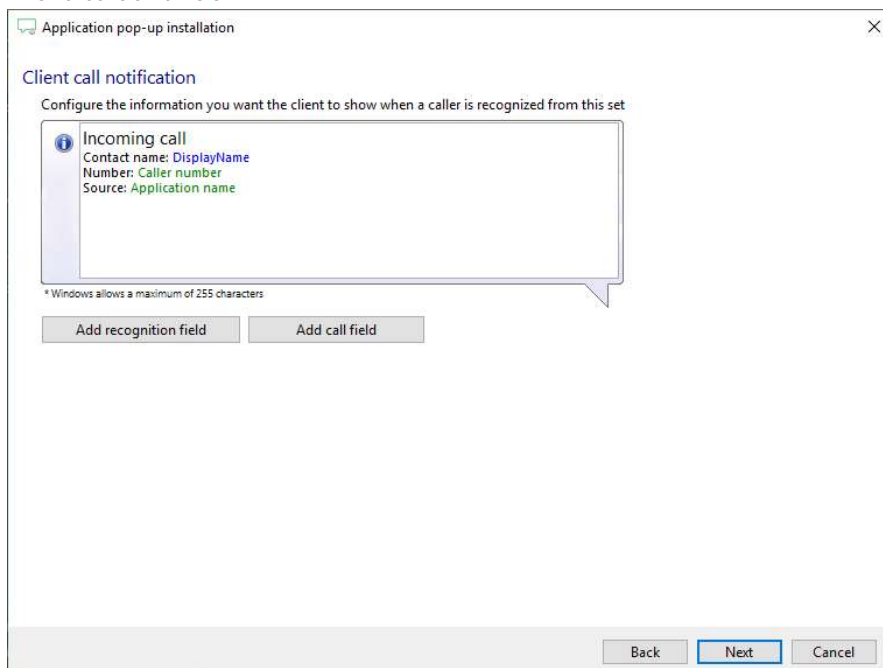

2) Connect to Zoho CRM to authorize CloudCTI. Click 'Connect'.

3) Enter your Zoho CRM credentials to access the data from your account and click 'Accept'.
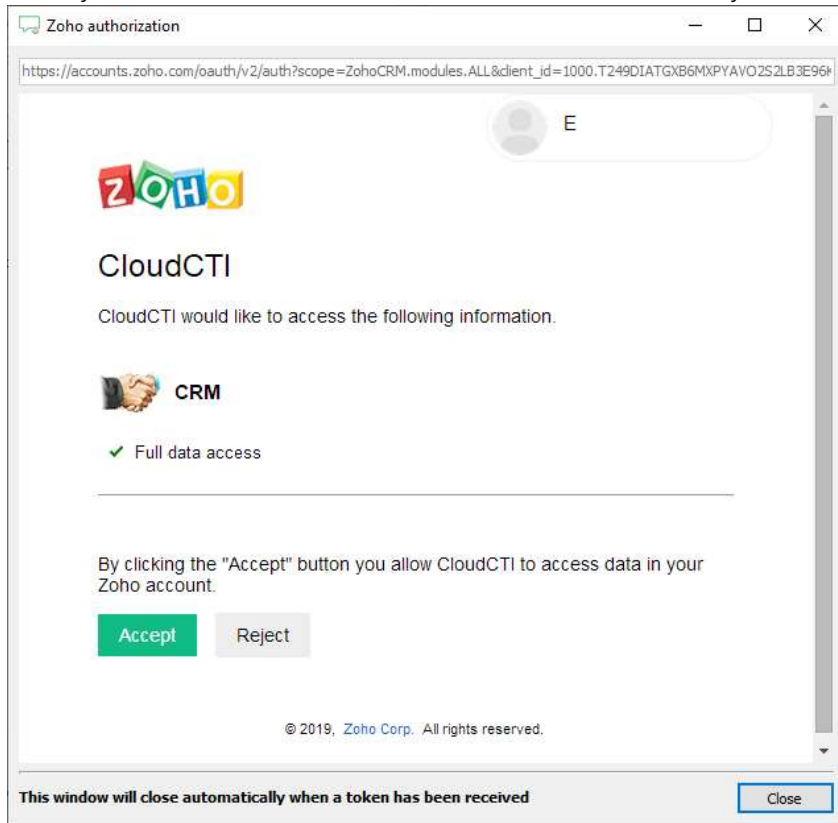
4) You can choose which fields to display in the call notification or leave it by default. Press 'Next' to continue

5) Check the configuration summary and click finish to add the recognition from Zoho CRM.