

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 <u>Recognition Configuration Tool</u> (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'Zoho CRM', as shown below.

SAP Anywhere	onarpspring	simplicate	SHEISLAIL	SugarCrivi /	Community	
	suite(CRM	SUITE CRM	SuperOffice W	00	00	
SugarCRMOnline	SuiteCRM 7	SuiteCRMOnline	SuperOffice All-CRM	SuperOffice Online	SuperOffice7 Windows	
Syntess Atrium		Tigerpaw.	TCPdesk	Dias	wtiger	
Syntess Atrium Professional	Teamleader	Tigerpaw	TOPdesk	Unit4 Dias	Vtiger	
Workbooks.com	22	CRM		Ē		
Workbooks	Zendesk	Zoho CRM	Zoho CRM EU	ZohoDesk		

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

💭 Application pop-up installation	×
Please enter your Zoho credentials 🛗	
Connect	
Back	Next Cancel



3) Enter your Zoho CRM credentials to access the data from your account and click 'Accept'.

Coho authorization	1 <u>222</u>		×
https://accounts.zoho.com/oauth/v2/auth?scope=ZohoCRM.modules.ALL&client_id=1000.T249DI/	TGXB6MXP1	AVO2S2L	B3E96⊧
Е			Ê
ZOHO			
CloudCTI			
CloudCTI would like to access the following information.			
CRM			
✓ Full data access			
By clicking the "Accept" button you allow CloudCTI to access data i Zoho account.	n your		l
Accept			
© 2019, Zoho Corp. All rights reserved.			•
This window will close automatically when a token has been received		Clo	ose

4) You can choose which fields to display in the call notification or leave it by default. Press 'Next' to continue

ont -	call potification		
Confi	gure the information you wa	nt the client to show when a caller is recognized from	n this set
0	Incoming call Contact name: DisplayName Number: Caller number Source: Application name		
* Wind	ows allows a maximum of 255 charact	Add call field	



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

Gamma Application pop-up installation	×
Summary	
Application	
Zoho CRM	
Recognition	
Recognition from Zoho	
Scripts	
Show Contact: Open webpage \$(PopUpUri)	
	Back Finish Cancel