

Phone Manager Application Support

JANUARY 2015

DOCUMENT RELEASE 4.2

APPLICATION SUPPORT



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Zoho CRM

Overview

This describes the features that are available when integrating with Zoho CRM.

Supported Versions


Version	Cloud
2014	

 The integration uses Zoho CRM Web Services v2014. Although Zoho CRM tries to maintain backwards compatibility when they upgrade their cloud platform this is never guaranteed. This version of the plugin has been tested on the latest version that was available upon release.

Limitations

The Zoho CRM API is limited to only searching for single record at a time based on a single telephone number format. For example to search the *Contacts* and *Leads* modules for the telephone number 08001831234 the plugin must make two separate calls to the API.

This can lead to performance & licensing issues when you are searching over multiple modules, in multiple telephone fields, with multiple telephone formats as an API call must be made for each one. For example, if you are searching for 1 number over 3 modules, over 6 number fields with 8 telephone formats, for 1 call you will have 144 queries to Zoho.

 Your version of Zoho will determine how many queries you are allowed per day. If you go over that number Zoho will return an error when sending the query. You will then not be able to make any more queries that day so the screen pop will not work.

To increase performance it is recommended that you store your telephone numbers in an unformatted string i.e. 08001831234 and turn off the Advanced Searching option, see the [Advanced](#) section for details. Reducing which telephone fields you search will also increase performance and by default only *Main* and *Mobile* numbers are set to search.

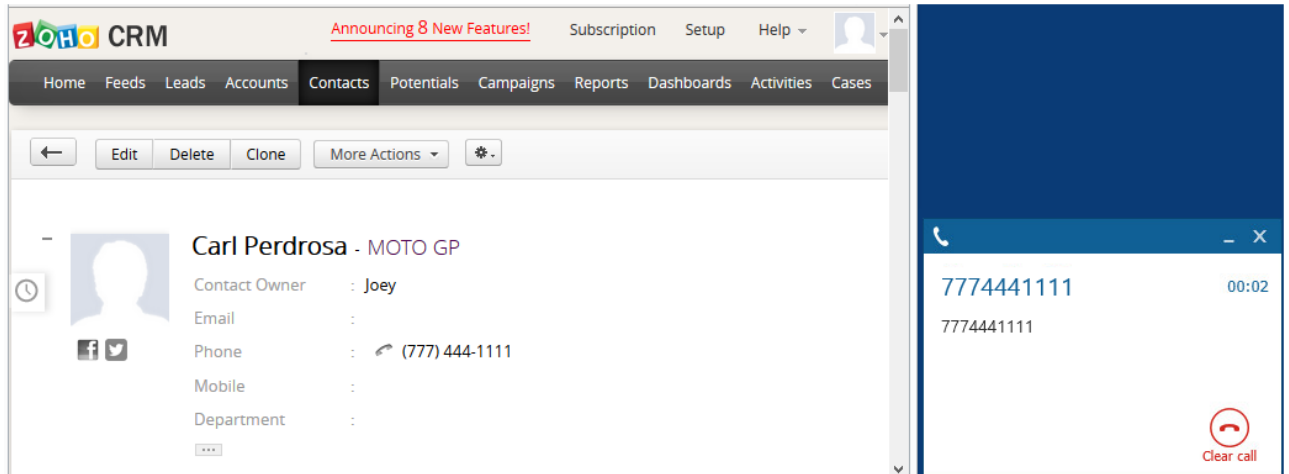
Features

Integration with Zoho CRM supports the features listed below:

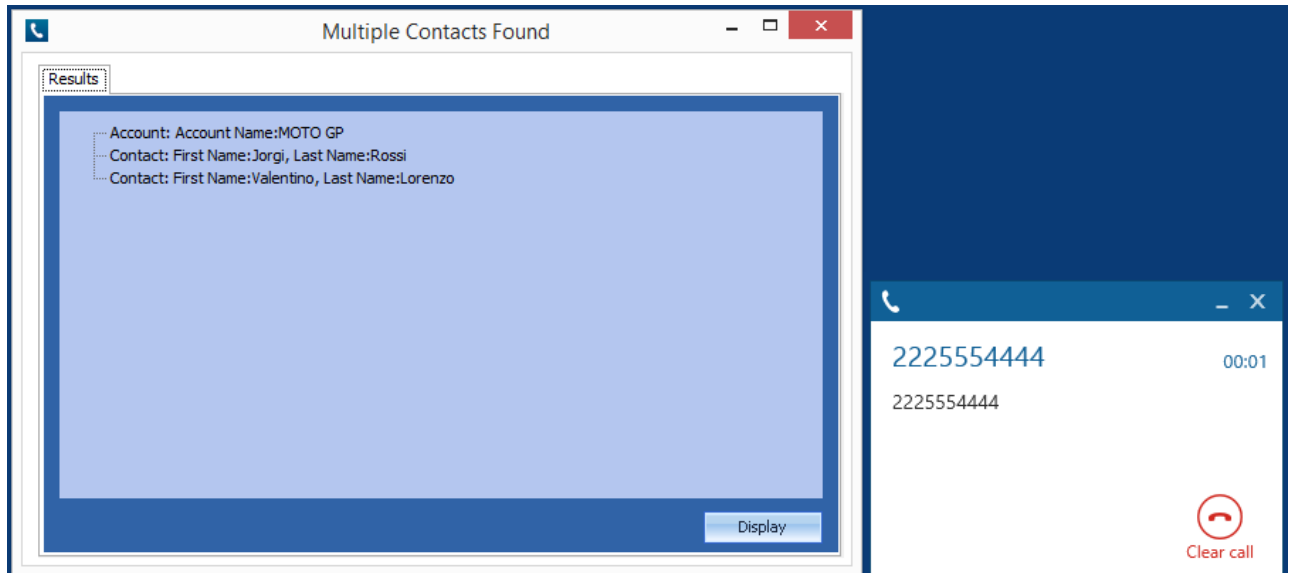
- [Screen pop for contacts, accounts and leads](#)
- [Automatic call history entry](#)

Screen pop

CRM *Contact*, *Account* and/or *Lead* entities can be screen popped directly within CRM when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* entity was found and the record was automatically displayed using the Users default browser.



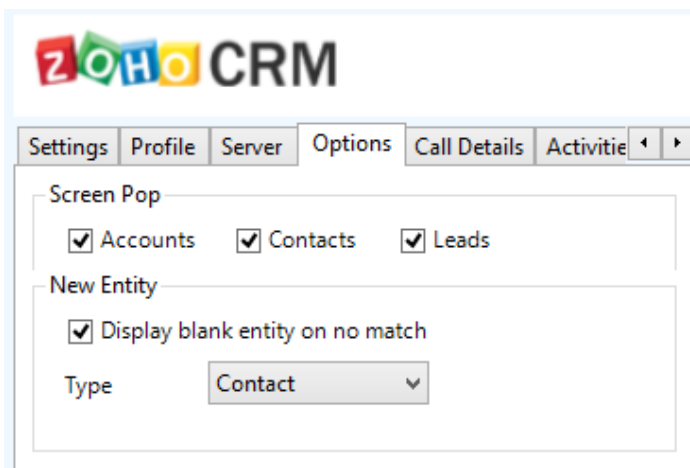
If multiple matches are found then the *Multiple Contacts Found* is shown and enables the User to select the correct record to be displayed. For example a call is made to 2225554444 and this has found three matching entities, a *Account*, *Contact* and *Lead*, that have this telephone number.



The correct Entity can then be highlighted and then clicking on the *Display* button will open this record.

Entity and matching options

Configuration options are available on the plugin that allow the type of *Entities* to be used in the searching to be set. For example it can be configured so that only the *Contact* Entities are searched. These options are set on the *Options* tab




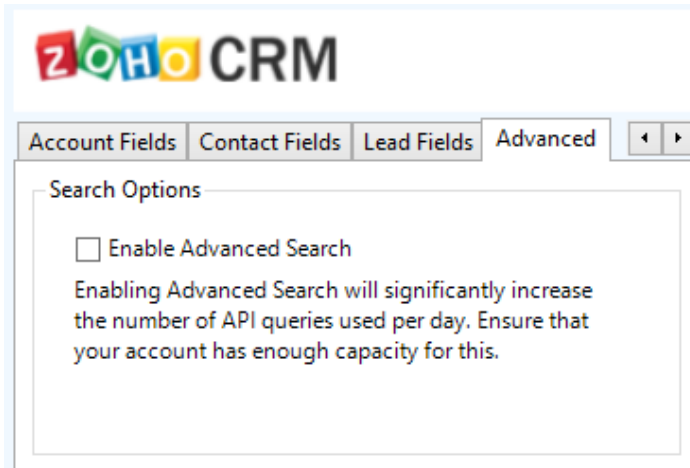
If no match is found when searching for an Entity than a blank form can be automatically displayed to create a New Entity. The

Type of Entity, *Contact*, *Account* or *Lead* that is created can be set here.

Advanced options

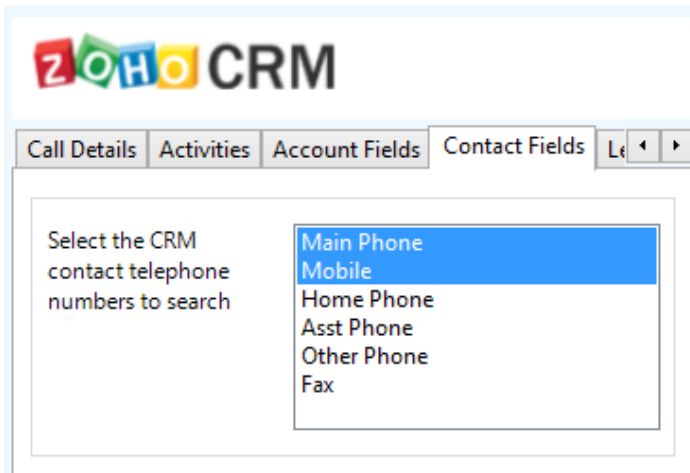
The *Advanced* tab control how matching contacts are searched for.

 Zoho CRM limits the number of calls to its API, and only lets you search for 1 phone number at a time. Zoho CRM free edition you may only send 250 queries per company per day, meaning if you are searching for the number 9876543210 in the US, and only searching for the Main Telephone number and only on the Contacts module, this search will generate 9 queries.






Search fields




The range of telephone numbers that are to be searched for can be configured for each of the *Contact*, *Account* or *Lead* Entities individually. By default the common telephone number fields are listed on the *Leads Fields*, *Contacts Fields* or *Account Fields* tab.









These are the default field name and descriptions and may be different if they have been customised. Contact your Zoho CRM administrator for details.

Contact Entities







Field name	Field description	Enabled?
Main Phone	Phone	
Mobile	Mobile	
Home Phone	Home Phone	

Asst Phone	Asst Phone	
Other Phone	Other Phone	
Fax	Fax	

Account Entities

Field name	Field description	Enabled?
Main Phone	Phone	
Mobile	Mobile	
Home Phone	Home Phone	
Asst Phone	Asst Phone	
Other Phone	Other Phone	
Fax	Fax	

Lead Entities

Field name	Field description	Enabled?
Main Phone	Phone	
Mobile	Mobile	
Home Phone	Home Phone	
Asst Phone	Asst Phone	
Other Phone	Other Phone	
Fax	Fax	

Telephone number formats

Zoho CRM does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210	(987)654-3210		

⚠ Zoho CRM limits the number of calls to its API, and only lets you search for 1 phone number at a time. Zoho CRM free addition you may only send 250 queries per company per day, meaning if you are searching for the number 9876543210 in the US, and only searching for the Main Telephone number and only on the Contacts module, this search will generate 9 queries. To increase performance and reduce queries you can disable the telephone format searching as described in [Advanced](#) section.

Call details

The call information that is used to search for matching records can be configured. By default the dialled number or the caller id are used to search with, depending on the call direction, but other call details can be configured. There are options for the direct dial number or the direct dial name (or DNIS) as shown.

📄 Caller ID represents either the caller ID for inbound calls or the dialled number for outbound calls.

The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

When multiple call details are used the searching will stop as soon as a match is found with the first call detail.

Automatic call history entry

The plugin supports the ability to be able to automatically create and display a Zoho CRM Phone Call Activity entity. The Entity to associate this with is found using the caller id received or the number dialled, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the [screen popping](#). The telephone numbers used to search are set in the [screen popping](#) section.

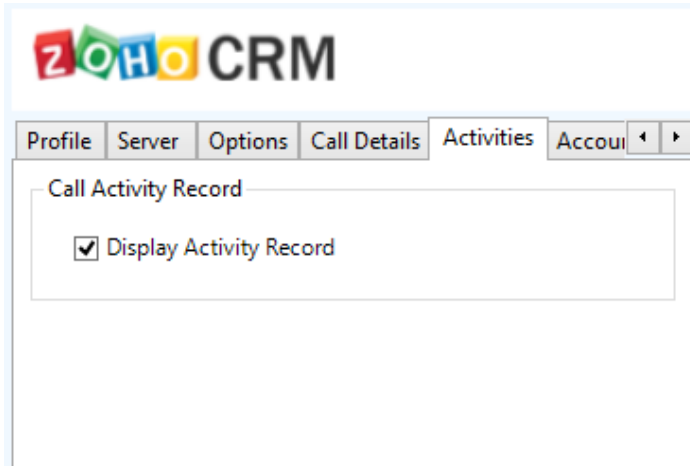
The Activity record is automatically created with the information relating to the call entered into the relevant fields.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received on.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they are not known until the call is cleared.

Call Recording

If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the recording id when the call has been answered.

The plugin configuration has options that can be set to determine how the record is created.



The screenshot shows the Zoho CRM configuration interface. At the top is the Zoho CRM logo. Below it is a navigation bar with tabs: Profile, Server, Options, Call Details, Activities, and Account. The 'Activities' tab is selected. Underneath, there is a section titled 'Call Activity Record' which contains a single checkbox labeled 'Display Activity Record' that is checked.

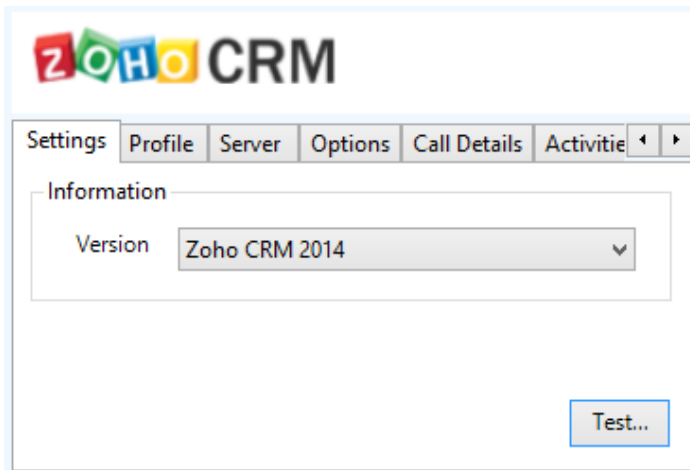
Display Activity Record: This will display the Activity form, if this is not set then the record will be created without the user seeing the form.

Configuration

For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to Zoho CRM.

Settings and versions

The correct version of Zoho CRM that is used needs to be selected from the Version drop down on the *Settings* tab.



The screenshot shows the Zoho CRM configuration interface. At the top is the Zoho CRM logo. Below it is a navigation bar with tabs: Settings, Profile, Server, Options, Call Details, and Activities. The 'Settings' tab is selected. Underneath, there is a section titled 'Information' which contains a dropdown menu labeled 'Version' with 'Zoho CRM 2014' selected. At the bottom right of the 'Information' section is a button labeled 'Test..'.

Server connection

The specific connection details to the CRM server need to be set on the *Server* tab.

The screenshot shows the Zoho CRM interface with the 'Server' tab selected. Under the 'Website' section, there are two input fields: 'URL' containing 'https://crm.zoho.com' and 'Token Url' containing 'https://accounts.zoho.com'.

URL: This is the URL of the Zoho CRM server. Contact your administrator for details on what this should be. Leave this as <https://crm.zoho.com> for the hosted version.

Token URL: This is the URL of the Zoho CRM accounts server. Contact your administrator for details on what this should be. Leave this as <https://accounts.zoho.com> for the hosted version.

Authentication and profile details

The Profile tab enables the security credentials used to access Zoho CRM to be configured.

The screenshot shows the Zoho CRM interface with the 'Profile' tab selected. Under the 'Details' section, there are three input fields: 'Username' containing 'ben.williams@acme.com', 'Password' containing a masked password (represented by dots), and 'AuthToken' containing '7dcf83a9e350c2f9f571cc60ec94855f'.

Username: This is the Zoho CRM username.

Password: This is the Zoho CRM password for this user.

Auth Token: This button generates an authentication token to log into Zoho CRM. You only need to generate this once. If you already have an authentication token you may enter it in here. The token is generated by Zoho based on your Zoho Username and password.


Your Zoho CRM administrator can manage AuthTokens through the settings page under Active AuthTokens setting shown.

Browser address bar: <https://accounts.zoho.com/u/h#setting/authtoken>

Zoho Accounts | [Home](#) | [Profile](#) | **Settings** | [Groups](#) | [Help](#) | [Sign Out](#)

Welcome **Joey**

User Profile Photo



[Upload your Profile Photo](#)

- **Preferences**
- **Two Factor Authentication**
- **Allowed IP Address**
- **Authorized Websites**
- **Linked Accounts**
- **Active Sessions**
- **Active Authtokens**
- **Activity History**
- **Close Account**

Settings

Manage your preferences and access information.

Active Authtokens

Access and manage all the active secret auth tokens of your account authorized to different scopes.

<input type="checkbox"/> Token	Scope Name	Service Name	IP Address	Description	Generated Time	Action
<input type="checkbox"/> 77986d74baf4383913aedc387ec2f992	crmapi	CRM	78.158.57.46		Nov 18, 2014 14:58:00 PM	<input type="button" value="Remove"/>
<input type="checkbox"/> 7dcf83a9e350c2f9f571cc60ec94855f	crmapi	CRM	78.158.57.46		Nov 18, 2014 15:10:55 PM	<input type="button" value="Remove"/>
<input type="checkbox"/> d605cae0baec654c29188dc9d7a00fe3	crmapi	CRM	78.158.57.46		Nov 18, 2014 15:04:42 PM	<input type="button" value="Remove"/>
<input type="checkbox"/> e4345787585ff63f1988c80b228455f0	crmapi	CRM	78.158.57.46		Nov 18, 2014 15:06:28 PM	<input type="button" value="Remove"/>