

# Phone Manager Application Support

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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 limits the number of API requests for a company on a per day limit. When searching over multiple modules there will be a separate API request for each module.

 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.

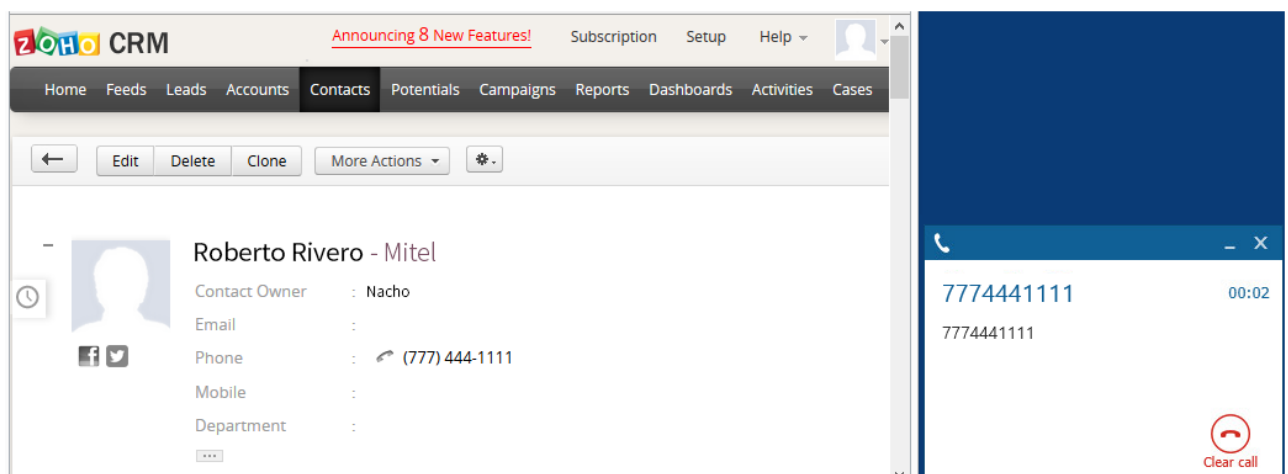
## Features

Integration with Zoho CRM supports the features listed below:

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

## Screen pop

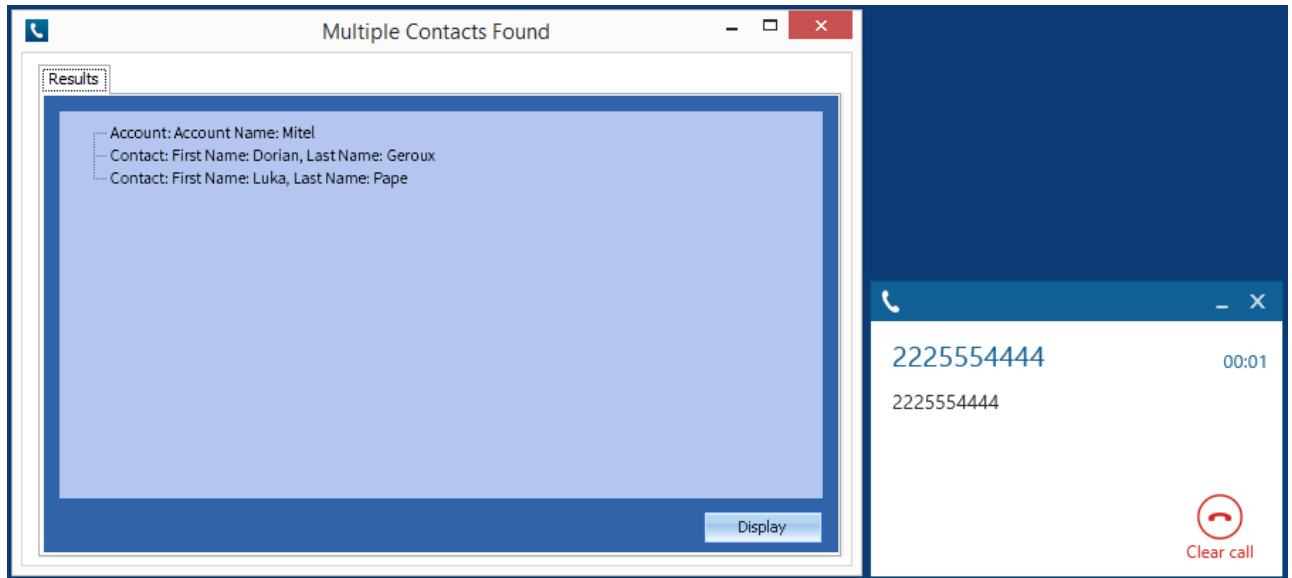
CRM *Contact*, *Account* and/or *Lead* entities can be screen popped directly within CRM when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching entities that have this number. For example an inbound 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.



The screenshot displays the Zoho CRM web interface. The top navigation bar includes 'Home', 'Feeds', 'Leads', 'Accounts', 'Contacts', 'Potentials', 'Campaigns', 'Reports', 'Dashboards', 'Activities', and 'Cases'. The 'Contacts' module is active, showing a contact record for 'Roberto Rivero - Mitel'. The contact details include: Contact Owner: Nacho, Email: (blank), Phone: (777) 444-1111, Mobile: (blank), and Department: (blank). A call toast notification is overlaid on the right side of the screen, showing the phone number '7774441111' and a duration of '00:02'. The toast also includes a 'Clear call' button.

If multiple matches are found then the *Multiple Contacts Found* is shown and enables the User to select the correct record to

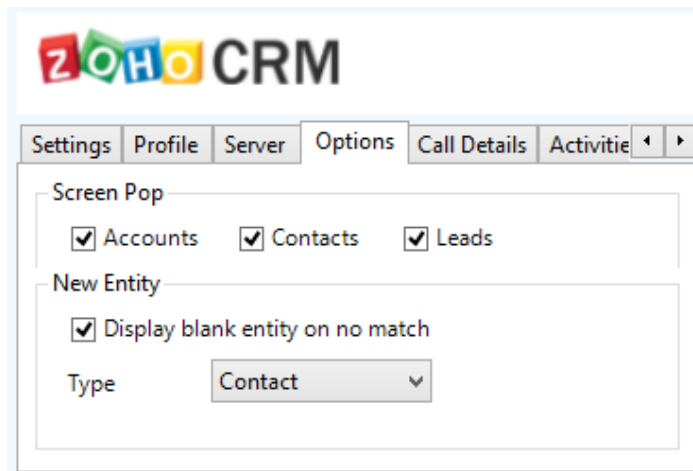
be displayed. For example a call is made to 2225554444 and this has found three matching entities, a *Account*, *Contact* and *Lead*, that have this telephone number.



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

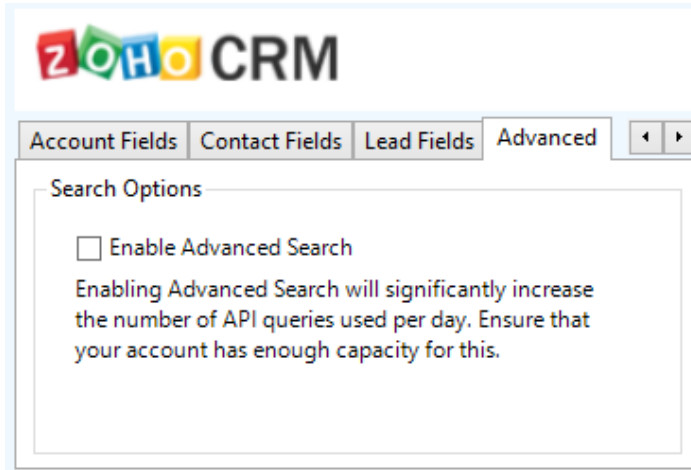


If no match is found when searching for an Entity than a blank form can be automatically displayed to create a New Entity. The Type of Entity, *Contact*, *Account* or *Lead* that is created can be set here.

**Advanced options**

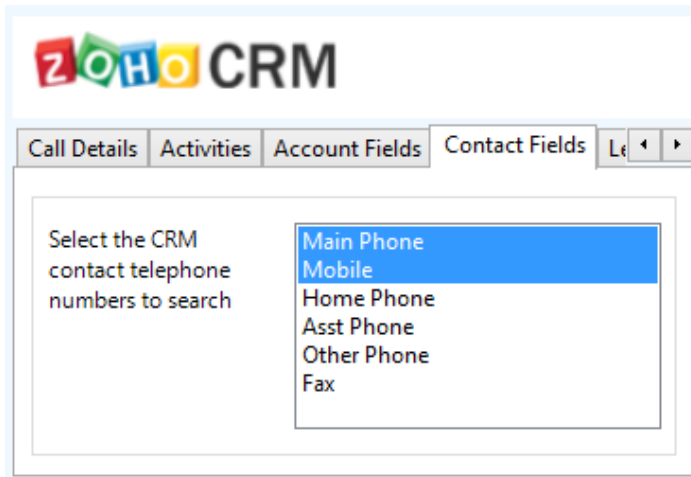
The *Advanced* tab control how matching contacts are searched for.

**⚠** Zoho CRM limits the number of calls to its API, and only lets you search for 1 phone number at a time. Zoho CRM 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.



**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? |
|------------|-------------------|----------|
| Phone      | Phone             |          |

|     |     |   |
|-----|-----|---|
| Fax | Fax |  |
|-----|-----|---|

**Lead Entities**

| Field name | Field description | Enabled?  |
|------------|-------------------|---|
| Phone      | Phone             |  |
| Mobile     | Mobile            |  |
| 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      |

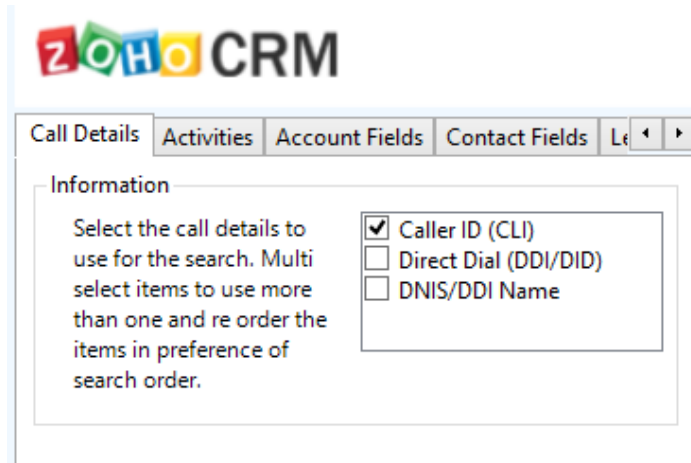
The default formats for the US are shown below. This is based on the number 9876543210 been searched for.


| 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 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 dialed 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.

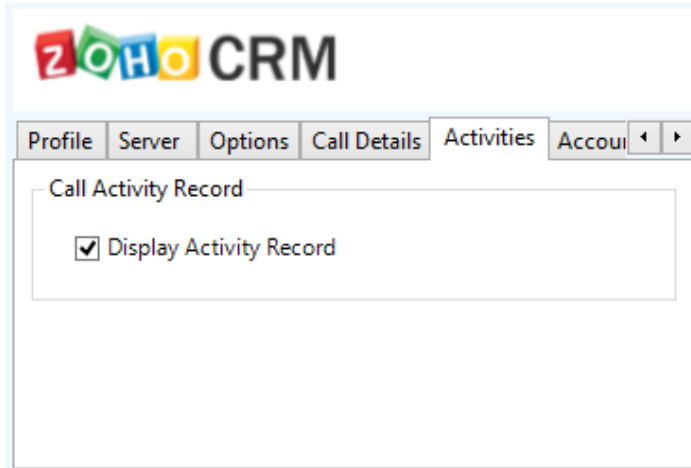
### Automatic call history entry

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 dialed, 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.

|                               |   |
|-------------------------------|---|
| <b>Phone number</b>           | For inbound calls this is the caller ID and for outbound calls this is the dialed number.   |
| <b>DDI/DID</b>                | For external inbound calls only, the DDI/DID number that the call came in on.   |
| <b>DDI/DID Name</b>           | For external inbound calls only, the DNIS of the DDI/DID that the call came in on.  |
| <b>Direction</b>              | The direction of the call.  |
| <b>Account Code</b>           | The account codes that was set on the call.   |
| <b>Trunk</b>                  | For external calls the outside network trunk number that the call was made or received on.  |
| <b>Transferring Extension</b> | The device that the call was transferred from.  |
| <b>Duration</b>               | 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.  |
| <b>Call Recording</b>         | 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 interface with the 'Activities' tab selected. Under the 'Call Activity Record' section, there is a checkbox labeled 'Display Activity Record' which is checked.

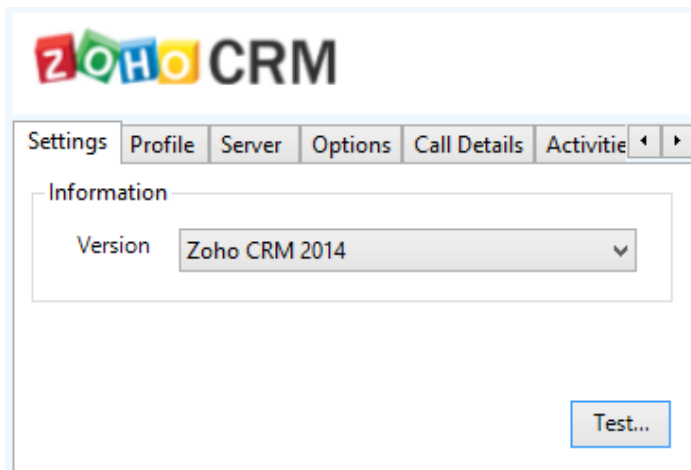
**Display Activity Record:** This will display the Activity form, if this is not set then the record will be created without the user seeing the form.

## 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 interface with the 'Settings' tab selected. Under the 'Information' section, there is a dropdown menu for 'Version' currently set to 'Zoho CRM 2014'. A 'Test...' button is visible at the bottom right of the settings area.

### 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' with the value 'https://crm.zoho.com' and 'Token Url' with the value '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 fields: 'Username' with the value 'maurice.abel@mitel.co.uk', 'Password' with masked characters, and 'AuthToken' with the value '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 **Michael**

**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.

Remove Selected

| <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 | <a href="#">Remove</a> |
| <input type="checkbox"/> 7dcf83a9e350c2f9f571cc60ec94855f | crmapi     | CRM          | 78.158.57.46 |             | Nov 18, 2014 15:10:55 PM | <a href="#">Remove</a> |
| <input type="checkbox"/> d605cae0baec654c29188dc9d7a00fe3 | crmapi     | CRM          | 78.158.57.46 |             | Nov 18, 2014 15:04:42 PM | <a href="#">Remove</a> |
| <input type="checkbox"/> e4345787585ff63f1988c80b228455f0 | crmapi     | CRM          | 78.158.57.46 |             | Nov 18, 2014 15:06:28 PM | <a href="#">Remove</a> |