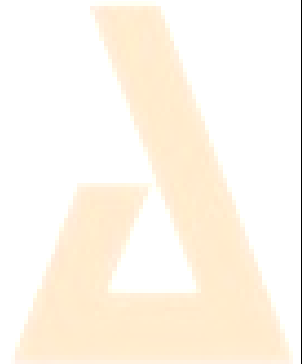
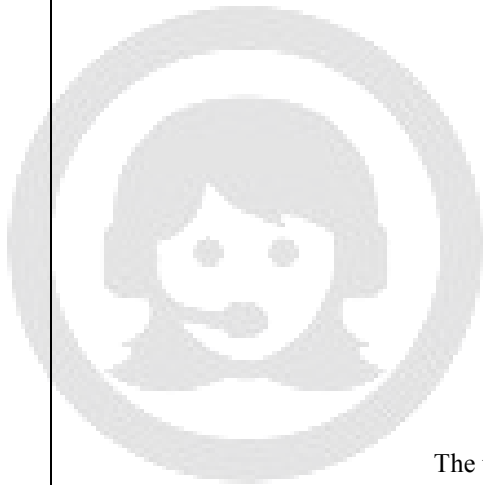




Integration with Zoho CRM

Technical & Feature Document
Document Version: 1.1



Revision History

The table below provides the revision history of this document

Date	Version	Author	Approved By	Description
Jun-2021	V1.1			Tech. Flow & Features



ETA

TABLE OF CONTENTS

S.No.	Topic	Page
1.	Preface	3
1.1	Purpose of this document	3
1.2	Use of this document	3
1.3	Overview	3
1.4	Basis of this Document	3
2.	Smart Dial Extension Enable Process For Zoho CRM	4-8



ETA



1. Preface

1.1 Purpose of this document

#1.1.a This document is a generic Technical Design Document for use by “Essence Technology Automation India Pvt. Ltd.”. It provides guidance and template material which is intended to assist the relevant management or production staff or support staff, in producing a project specific Technical Design Document. It is also useful background reading for anyone involved in developing or monitoring the existing Smart Dial extension enable process for Zoho CRM.

1.2 Use of this document

#1.2.a This Preface is addressed to the users of this generic document and is not meant to be retained in any project specific Technical Design Document based on it.

#1.2.b This document may be modified or overwritten directly at each occurrence and it depends of the discretion of the user.

1.3 Overview

#1.3.a This preface is for information only (in very specific term the purpose & the use).

1.4 Basis of this Document

#1.4.a It attempts to set standards and create a consistent approach to the design and development of systems across the Program. It will enable the Program to benefit from ‘economies of scale’ and a consistency in the approach to building and deploying systems. Important issues that need to be considered include the architecture of systems, links to legacy systems, contemporary approaches to design (Object Oriented Program), aims for code re-use and the need to develop systems that will work on an operational basis over many years and the associated desire to make such systems easily supportable and affordable.

#1.4.b A key point will be to build on the work already carried out in smart and its predecessor programs, where a large number of specific ‘technical’ developments were undertaken looking at, for example, standards for data exchange, such as APIs, and the introduction of contemporary technologies and infrastructures.

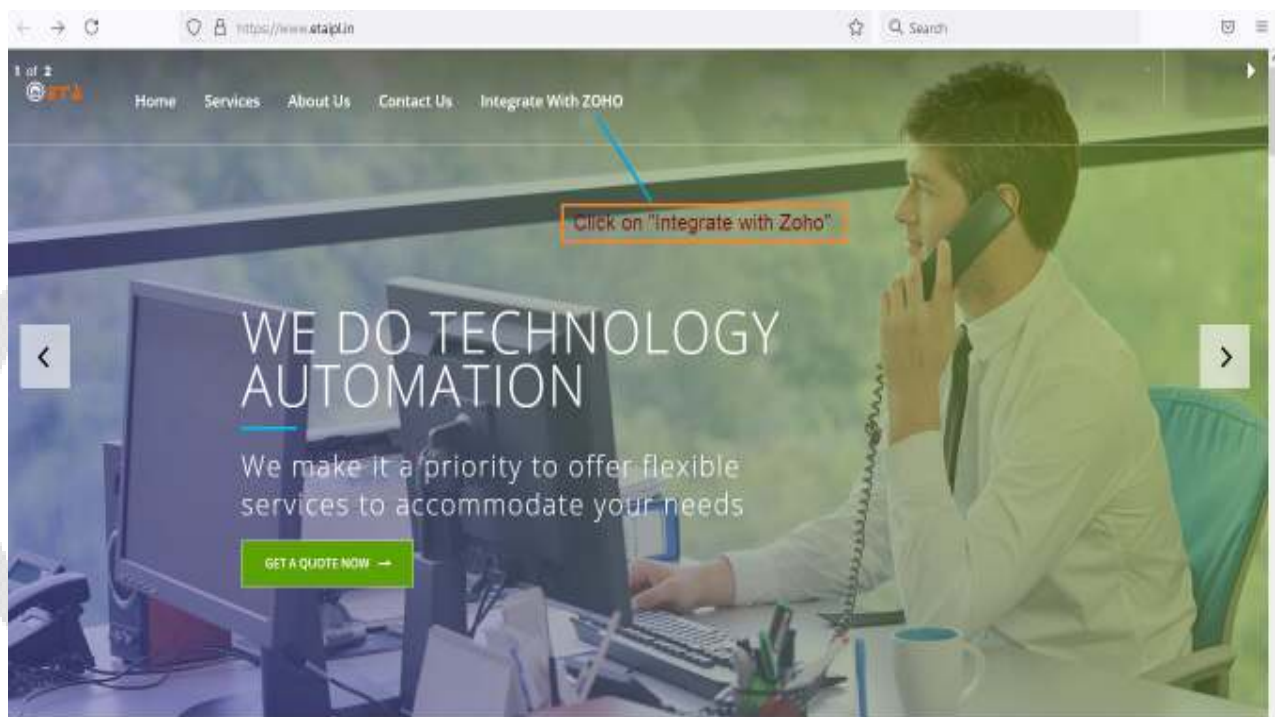


2. Smart Dial Extension enable process for Zoho CRM

Find the steps to be taken for the integration with the ZOHO for enabling SMART DIAL extension in ZOHO CRM.

Step1: Visit <https://www.etaipl.in>

Step2: Then click on “Integrate With Zoho” as shown in below page



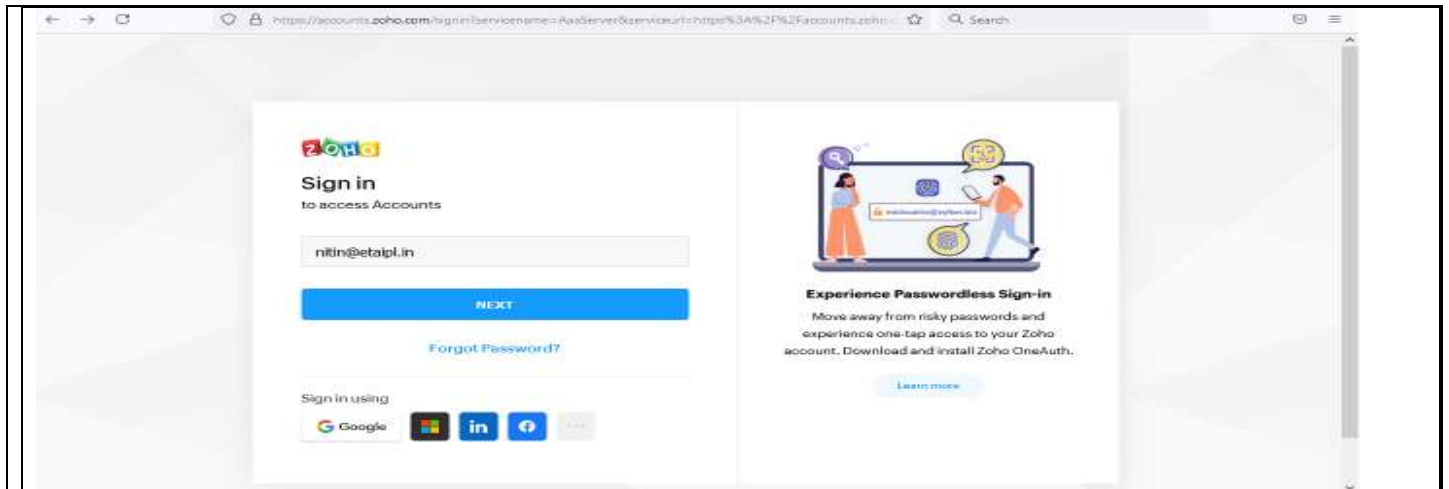
Step3: Once the integration page is opened , then it shows as follows:



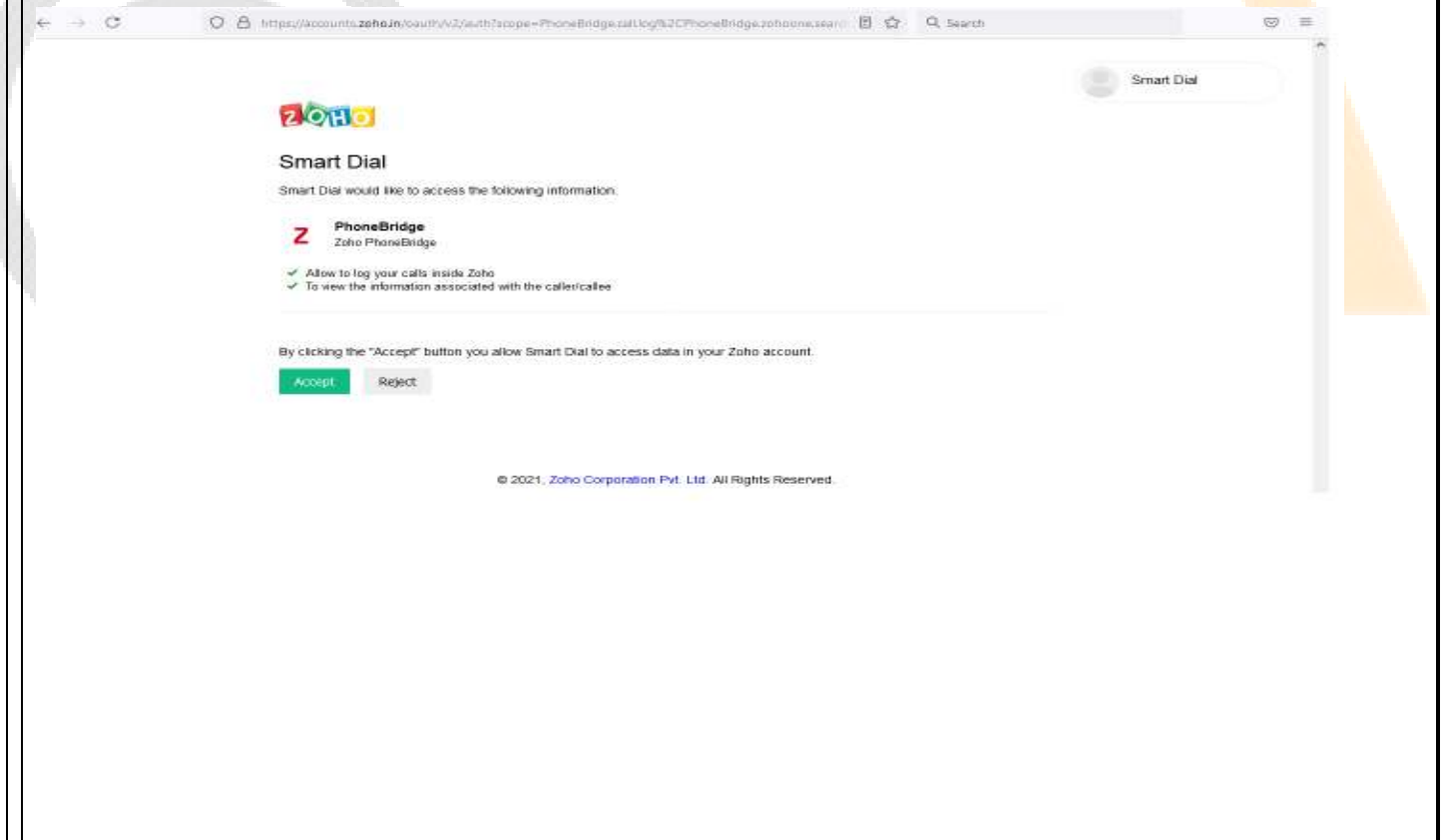
Step4: Fill out the client id, agent id and campaign available in or shared by the Smart Team.

Step5: Then click on Save button to submit the information

Step6: The website will be redirected to the Zoho panel, login with email or mobile and password.



Step7: After logged In, it asks for Accept/Reject





Step8: Then click on “Accept” button for PhoneBridge authorization of the SMART dial extension.

Step9: Check the message available on the screen after accepting the authorization, which looks like as follows:

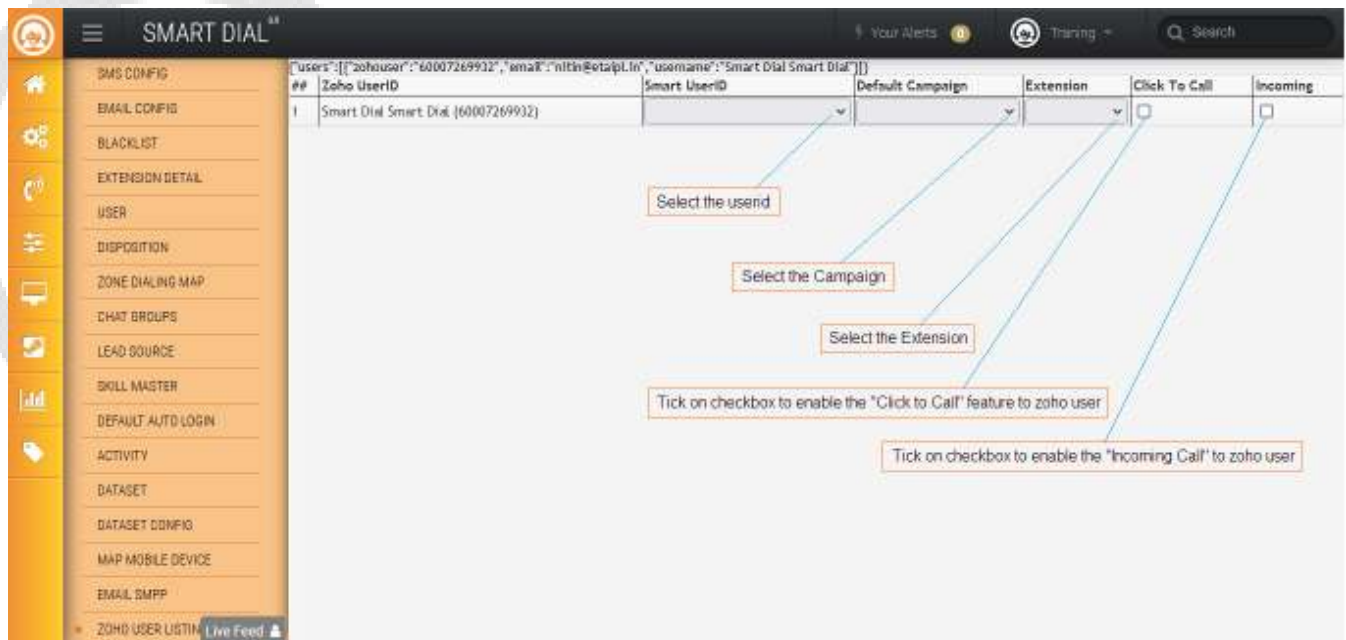


Integration With ZOHO has been completed for the agent.

Step10: If it is successful, then smart dial extension is enabled in the Zoho CRM.

Step11: Now, login to the SMART Administrator Panel.

Step12: Goto System Configuration > Zoho User Listing Menu.



Step13: Select the userid in the SMART Userid Column, campaign in Default Campaign Column and SIP Number in the Extension Column.

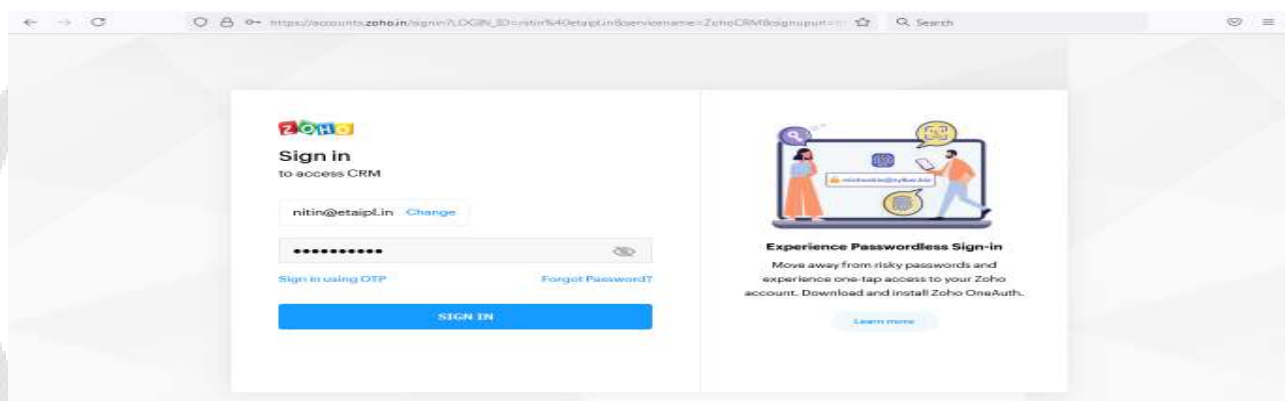


#	Zoho UserID	Smart UserID	Default Campaign	Extension	Click To Call	Incoming
1	Smart Dial Smart Dial (60007269932)	admin (Training)	TRAINING	60106	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Step14: Mark the click to call column checkbox true, if click to call has to be enabled for that Zoho user. Mark incoming column checkbox true, if incoming has to be enabled for that Zoho user.

(Note: incoming will be default true, if click to call has been checked true, it can be manipulated afterwards.)

Step15: Then Login to Zoho CRM Login page as follows:



Step16: Now it is good to go for the calling from ZOHOO CRM using SMART DIAL Extension.

