



# **Zoho Integration Guide**

Version : 1.0.0

Ease customer calling process simplified with integration of HoduCC plugin with your Zoho CRM account. By doing this, your agents will get a call notification popup directly in Zoho. Agents will also get missed call alerts, for which they could set up call reminders in Zoho. The call between your customer and agent will get recorded and it will be available in Zoho CRM reports and call analytical data.

### **Basic Requirements:**

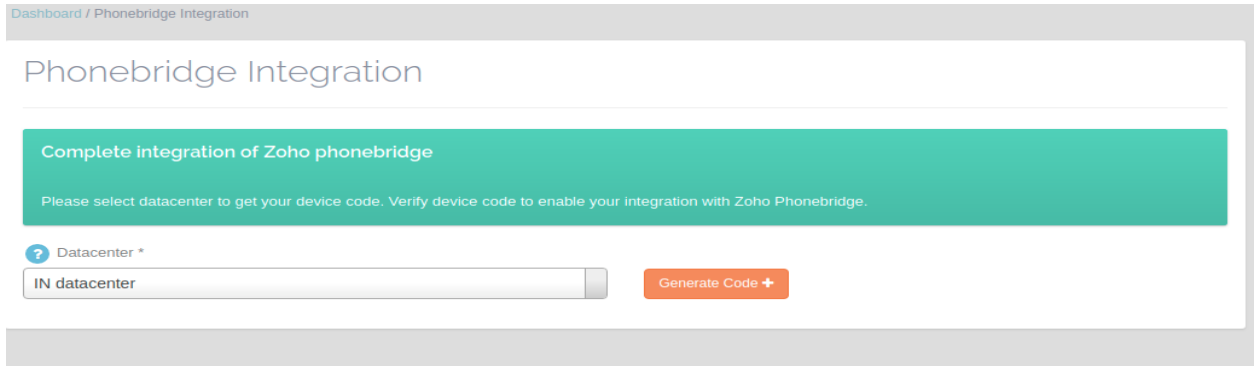
- 1) Zoho CRM administrator account access.
- 2) Already have a HoduCC account, contact our support team to start your Zoho Phonebridge Integration.
- 3) New to HoduCC, write to us directly on [sales@hodusoft.com](mailto:sales@hodusoft.com) to get you registered with us.

**Once you have active HoduCC and Zoho CRM account, complete two simple steps to get started:**

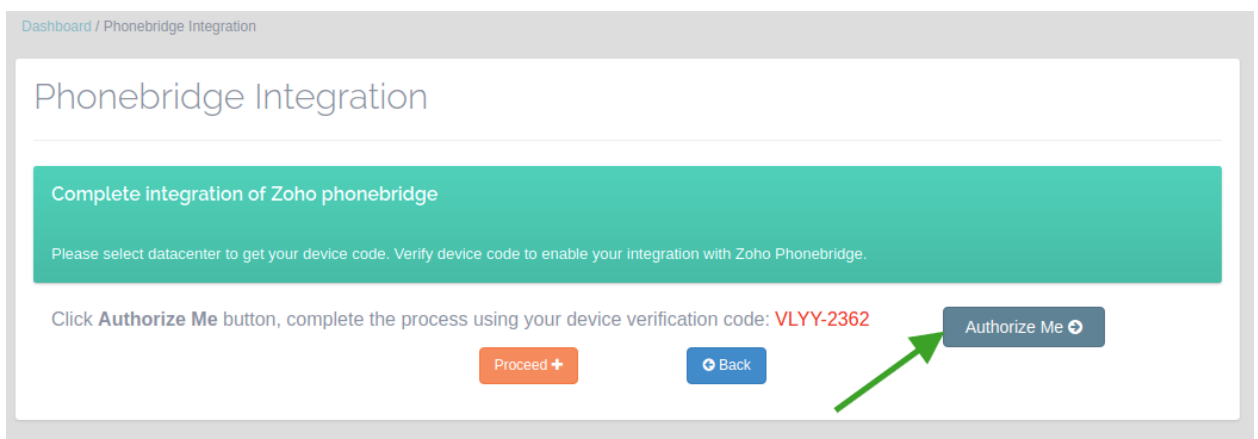
- 1) Authorize Zoho Phonebridge Integration in HoduCC
- 2) Associate HoduCC Agent with Zoho CRM Users

### **Step 1 : Authorize Zoho Phonebridge Integration in HoduCC**

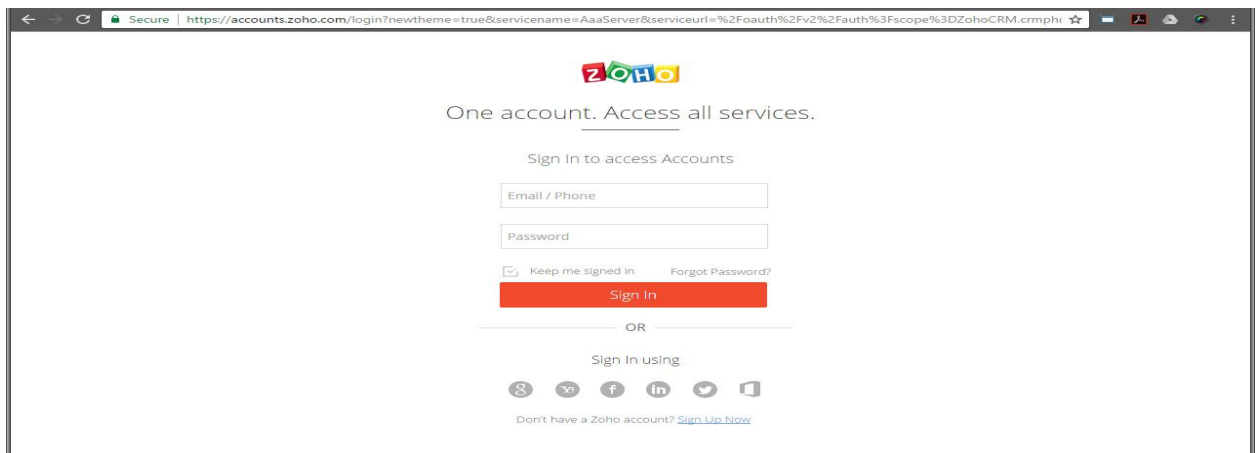
1. Login in HoduCC and click on **Zoho** Menu on the left sidebar.
2. Click the first sub-menu **Phonebridge Integration**.
3. Select **Datacenter**, click on **Generate Code**.



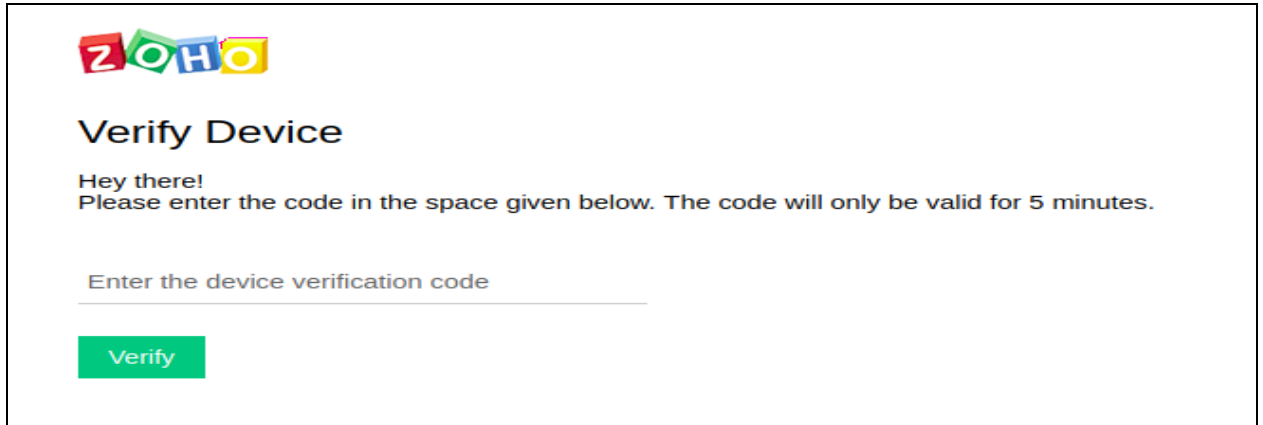
- Next you need to click on the Authorize **Me** button, this will redirect you to Zoho.



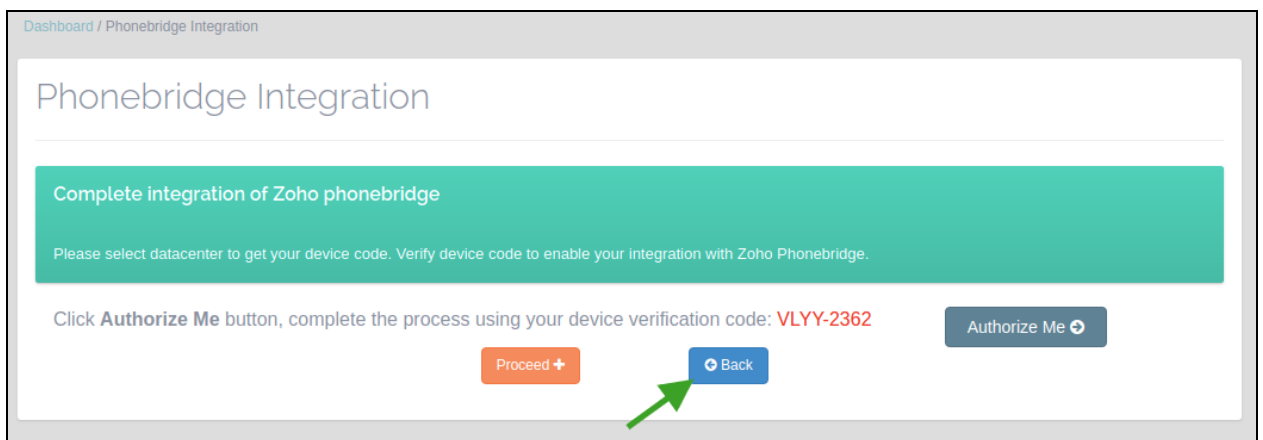
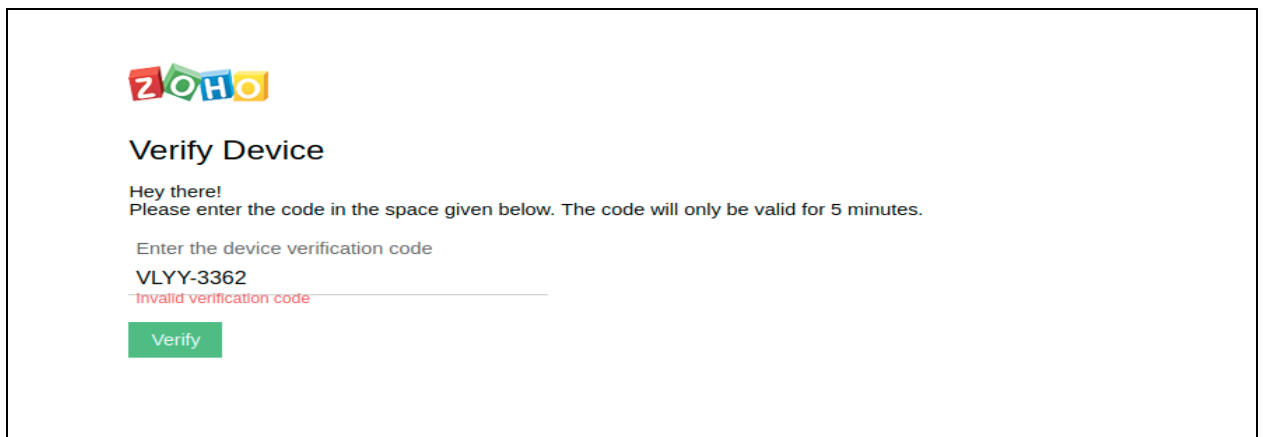
- Login with your Zoho CRM administrator account and enter device verification code to complete the authorization process.



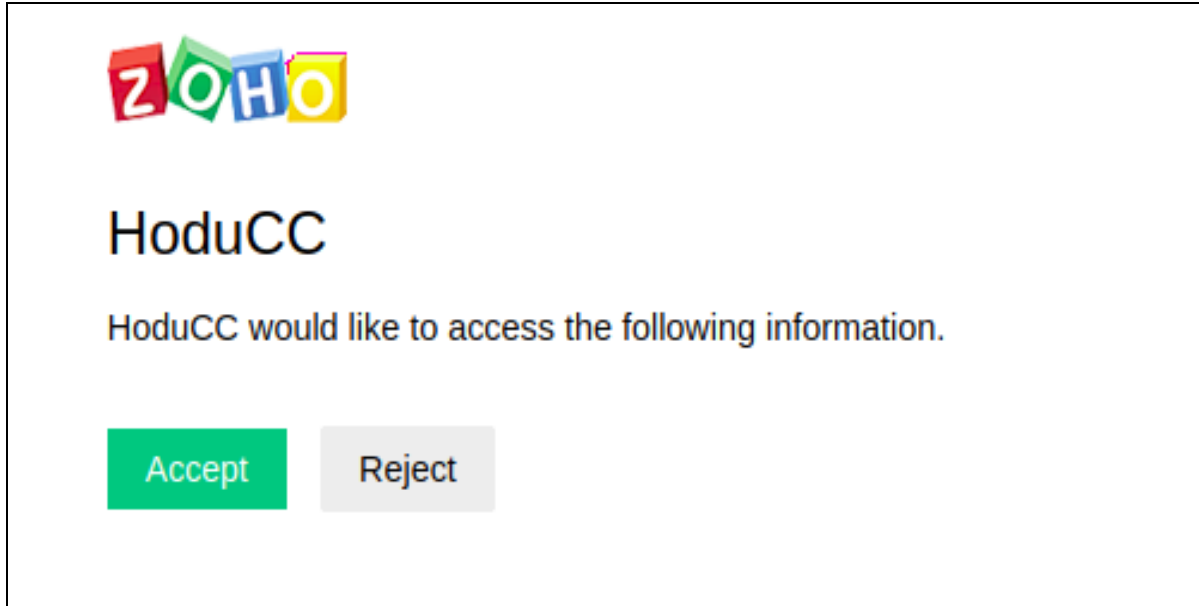
- Add your **device verification code** received in the HoduCC phonebridge integration page. Refer to step 4 to get device verification code.



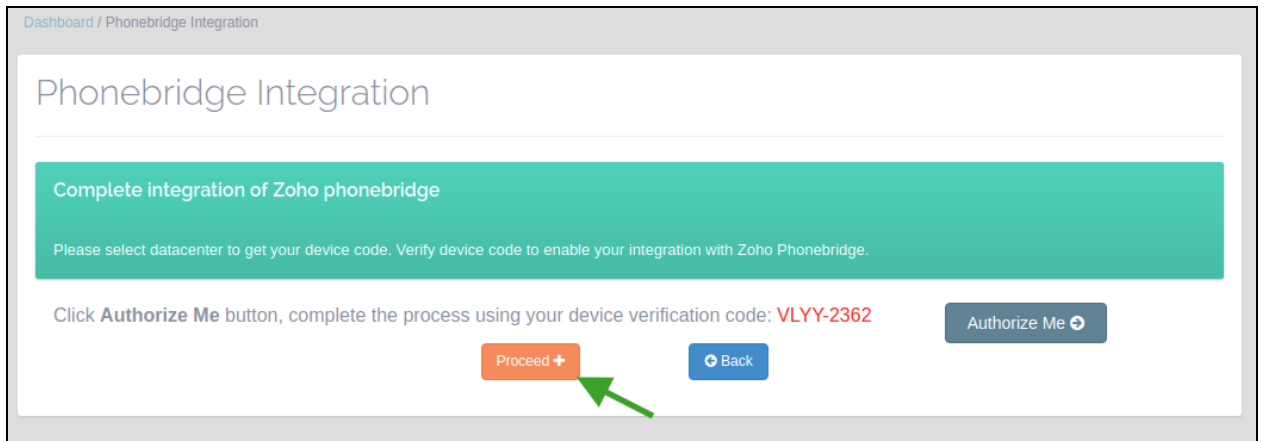
7. Device verification code has an expiry time of 60 minutes. Please note that in this case you need to back and re-generate device code using the Back button.



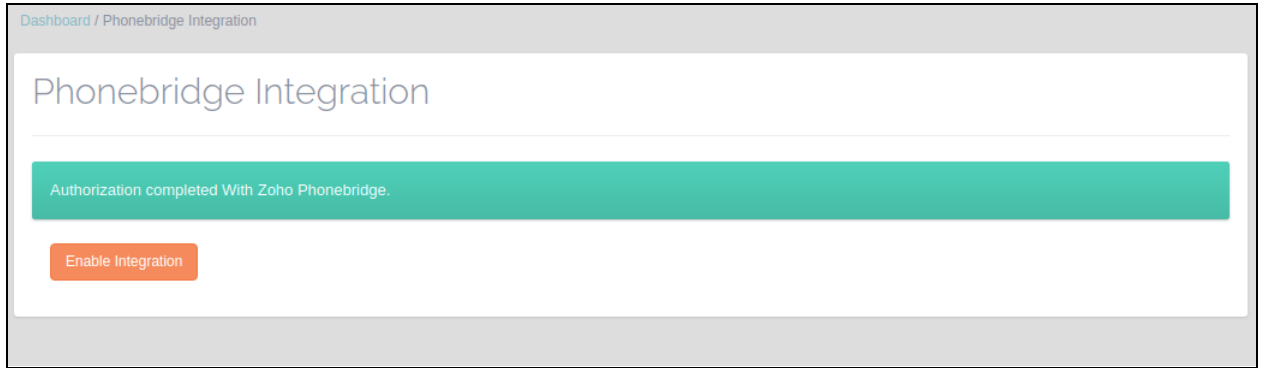
8. Click on the Accept button and go back to the HoduCC Phonebridge Integration page.



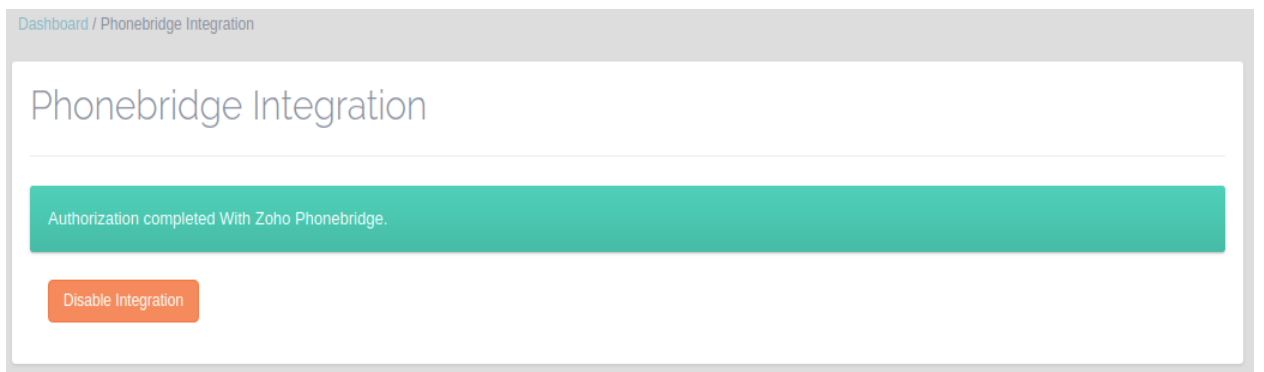
9. Once you successfully finish step 8, click on the Proceed button to complete authorization.



10. Please click on **Enable Integration** to complete Zoho phonebridge integration.



11. Please click on **Disable Integration** to disable Zoho phonebridge integration.



## **Step 2 : Associate HoduCC Agent with Zoho CRM Users**

1. Click the Assign Zoho Agent link on the left side menu bar. Click the **Add new** button at the top right.

Assign Zoho Agent Add New +

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10 ▾

	Agent	Campaign	Status
	ALL	ALL	ACTIVE

No results found.

10 ▾ Displaying 1-0 of 0 results.

2. Select **Agent**, **Campaign** and **Zoho Username** in dropdown. Set status as **On** to enable the integration status by default.

Add Assign Zoho Agent

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? Agent \*      ? Campaign \*      ? Zoho Username \*

Select Agent      Select Campaign      Select Zoho Username

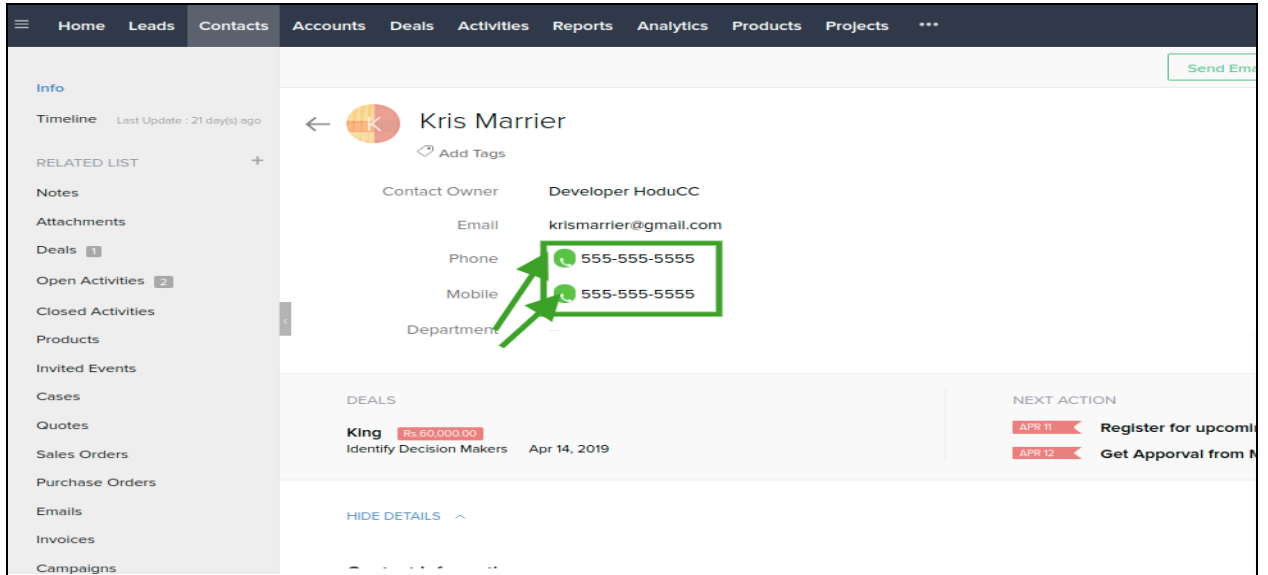
? Status

ON

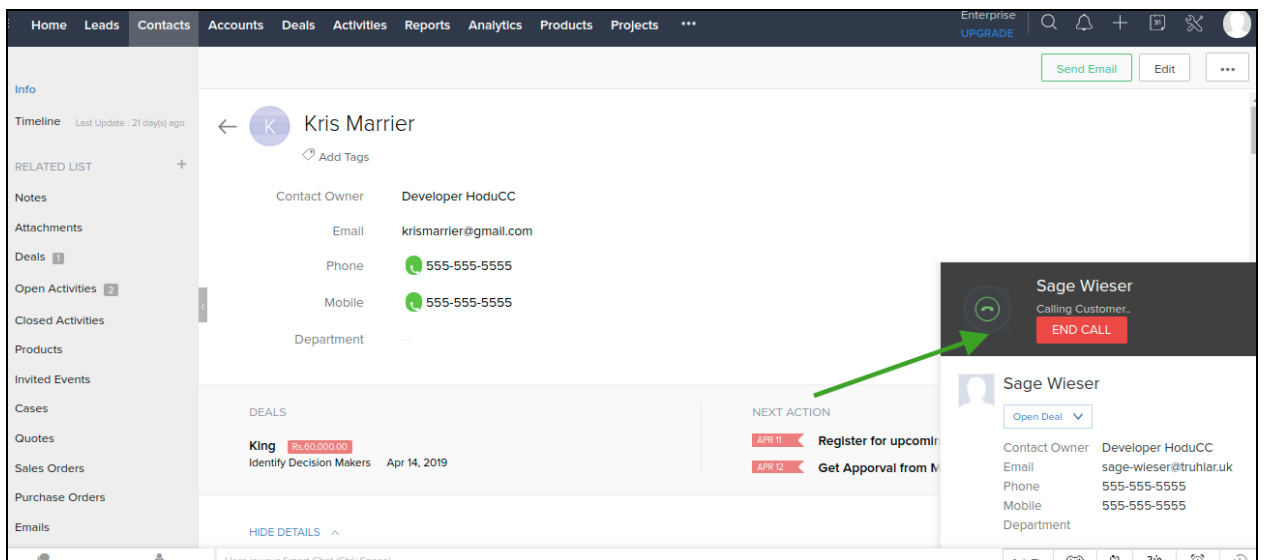
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Create ↗
↶ Back

3. Now click on the **Create** button to assign an agent with a Zoho user. The mapped agents can now also see the Dial button in Zoho CRM.



4. Agent will get a call popup in Zoho CRM whenever a new call is placed from Zoho or HoduCC system.



5. When a customer is making a call to your agent in HoduCC, an automated popup shows up in Zoho CRM. You can also submit call disposition in Zoho CRM once the call is ended.



Enterprise UPGRADE

Home Leads **Contacts** Accounts Deals Activities Reports Analytics Products Projects \*\*\*

All Contacts + Import ...

Canvas View: **Contacts - Canvas** Edit Sort By Fit to Screen

FILTER CONTACTS BY

- Touched Records
- Untouched Records
- Record Action
- Related Records Action
- Email Status
- Activities
- Notes
- Deals
- Deal Amount
- Deal Stage
- Deal Owner
- Deal Closing Date
- Campaigns

<input type="checkbox"/>		<b>Niids Khakhkhar</b> / n/a n/a / (906) 738-0773 / (906) 738-0773 n/a / n/a / n/a	Agent Supreme Apr 29, 2019 03:51 PM
<input type="checkbox"/>		<b>Nids Khakhkhar</b> / n/a n/a / (906) 738-0773 / (906) 738-0773 n/a / n/a / n/a	Developer HoduCC Apr 25, 2019 05:28 PM
<input checked="" type="checkbox"/>		<b>Kris Marrier</b> / n/a krismarrier@gmail.com / 555-555-5555 / 555-555-5555 Quality Engineer / n/a / Trade Show	APR 11
<input checked="" type="checkbox"/>		<b>Sage Wieser</b> / n/a sage-wieser@truhtar.uk / 555-555-5555 / 555-555-5555 Product Engineer / n/a / Advertisement	APR 13

Total Count: 12

**Sage Wieser**  
Calling..

**Sage Wieser**  
[Open Deal](#)

Contact Owner: Developer HoduCC  
Email: sage-wieser@truhtar.uk  
Phone: 555-555-5555  
Mobile: 555-555-5555  
Department:

Here is your Smart Chat (Ctrl+Space) Ask Zia