Integrate HoduPBX With Zoho

Ease calling process simplified with integration of HoduPBX plugin with your Zoho CRM account. By doing this, your extensions will get call notification popup directly in Zoho. Extensions will also get missed call alerts, for which they could setup call reminders in Zoho. The call analytical data of call between caller and callee will be available in Zoho CRM reports.

Basic Requirements:

- 1) Zoho CRM administrator account access.
- 2) Already have a HoduPBX account, contact our support team to get you started with Zoho Phonebridge Integration.
- New to HoduPBX, write to us directly on <u>sales@hodusoft.com</u> and get yourself registered with us.

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

- 1) Authorize Zoho Phonebridge Integration in HoduPBX.
- 2) Associate HoduPBX Extension with Zoho CRM Users.

Step 1 : Authorize Zoho Phonebridge Integration in HoduPBX

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

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4. Next you need to click on Authorize Me button, this will redirect you to Zoho.



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

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🛗 Apps 🗳 OrangeHRM 🌀 Gmail M 🖸 JIRA 🖿 PBX 🖿 PBX-DB 🖿 ClientList 🚯 Hoducrm 🖿 Client_db 🖿 HoduSwitch 👘 Other bookmarks
ZOHO
One account. Access all services.
Sign In to access CRM
hodupbxin2@protonmail.com
C Keep me signed in Forgot Password?
Sign In
OR
Sign in with Google or other IDPs
Don't have a Zoho account? <u>Sign Up Now</u>

6. Add your **device verification code** received in HoduPBX Phonebridge integration page. Refer to step 4 to get device verification code.



Verify Device

Hey there! Please enter the code in the space given below. The code will only be valid for 5 minutes.

Enter the device verification code

Verify

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



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



HoduPBX

HoduPBX would like to access the following information.



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

Home / Phonebridge Integration			
Phonebridge Integration			
Complete integration of Zoho	phonebridge		
Please select datacenter to get your devic	code. Verify device code to enable your int	egration with Zoho Phonebridge.	
Click Authorize Me button, complet	e the process using your device ver	fication code: VMBK-4753	
and success complete	e the process using your device veh		Authorize Me G
	Proceed +		

10. Next, click on **Enable Integration** to complete Zoho Phonebridge integration.



11. You can choose to **Disable Integration** when you want to temporarily disable the integration. In case you want to create a new integration, click on **Delete Integration** to permanently remove the existing integration.

Home / Phonebridge Integration		
Phonebridge Integration		
Authorization completed With Zoho Phonebridge		
Disable integration Delete integration		

Step 2 : Associate HoduPBX Extension with Zoho CRM Users

1. Click Extension Mapping link on the left side menu bar. Click the **Add new** button at the top right.

Home / Extension Mapping with	h Zoho User		
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2. Select **Extension**, **Zoho Username** in dropdown. Set status as **On** to enable the integration status by default.

Extension *	Select	*	Zoho Username *	Select	*
Status	ON 🔵				

3. Now click on the **Create** button to map HoduPBX extension with Zoho user. The mapped extensions can now also see **Dial** button in Zoho CRM.

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RELATED LIST +	Add Tags					
Notes	Contact Owner	Developer HoduCC				
Attachments	Email	krismarrier@gmail.com				
Deals	Phone	555-555-5555				
Open Activities 🗾	Mobile	555,555,5555				
Closed Activities						
Products	Department					
Invited Events						
Cases	DEALS				NEXT ACTIO	N
Quotes	King Rs 60,000.00				APR 11	Register for upcomi
Sales Orders	Identify Decision Makers	Apr 14, 2019			APR 12	Set Apporval from N
Purchase Orders						
Emails	HIDE DETAILS					
Invoices						
Campaigns						

4. Extension will get call popup in Zoho CRM whenever new call is dialed from Zoho or HoduPBX system.

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5. When your extension receives an incoming call in HoduPBX, an automated popup is also shown in Zoho CRM.

