

# 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:**

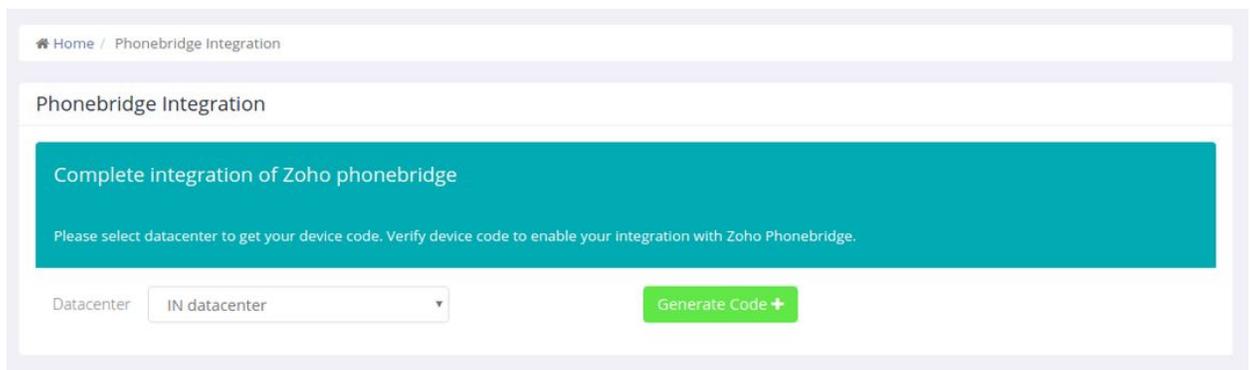
- 1) Zoho CRM administrator account access.
- 2) Already have a HoduPBX account, contact our support team to get you started with Zoho Phonebridge Integration.
- 3) New to HoduPBX, write to us directly on [sales@hodusoft.com](mailto:sales@hodusoft.com) and get yourself registered with us.

**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**.



Home / Phonebridge Integration

Phonebridge Integration

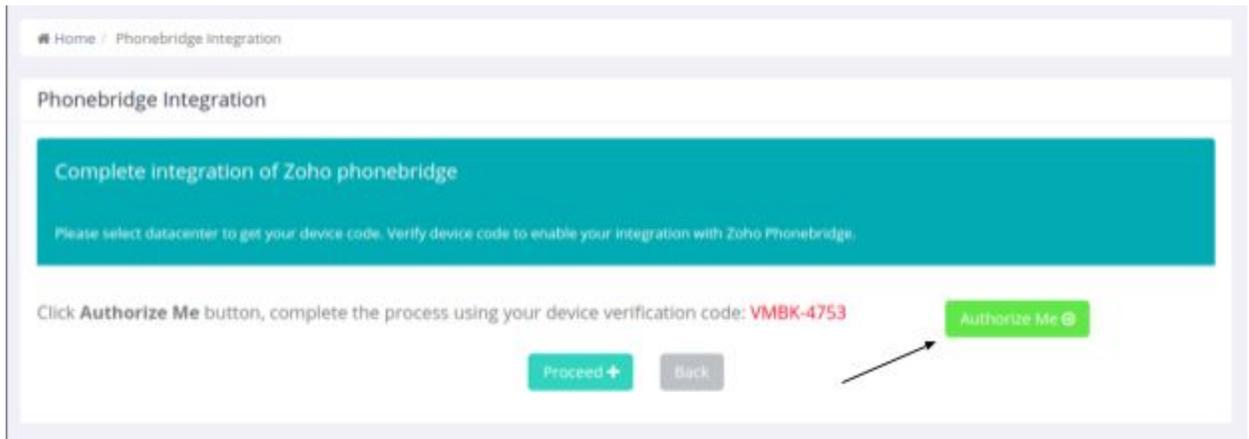
Complete integration of Zoho phonebridge

Please select datacenter to get your device code. Verify device code to enable your integration with Zoho Phonebridge.

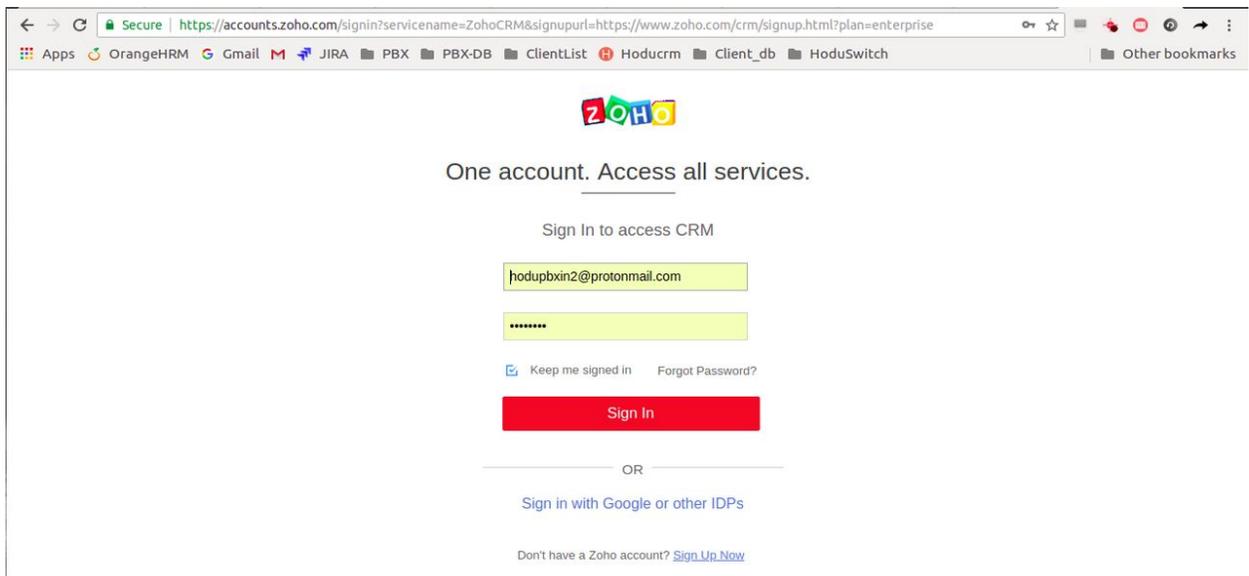
Datacenter IN datacenter

Generate Code +

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



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



- 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.



## 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

qqqq-1111|

Invalid verification code

Verify

Home / Phonebridge Integration

### Phonebridge Integration

Complete integration of Zoho phonebridge

Please select datacenter to get your device code. Verify device code to enable your integration with Zoho Phonebridge.

Click **Authorize Me** button, complete the process using your device verification code: **VMBK-4753**

Proceed +    Back    Authorize Me

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



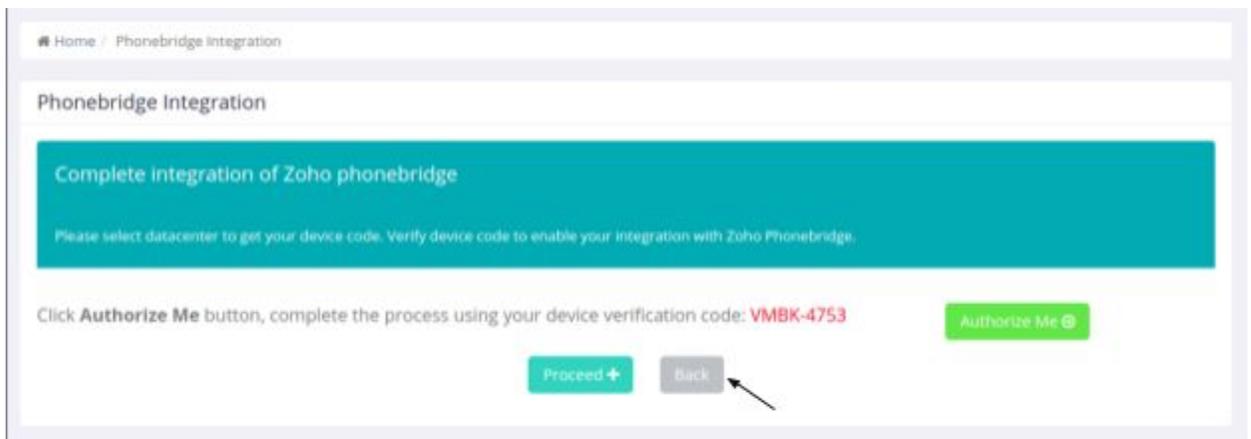
## HoduPBX

HoduPBX would like to access the following information.

Accept

Reject

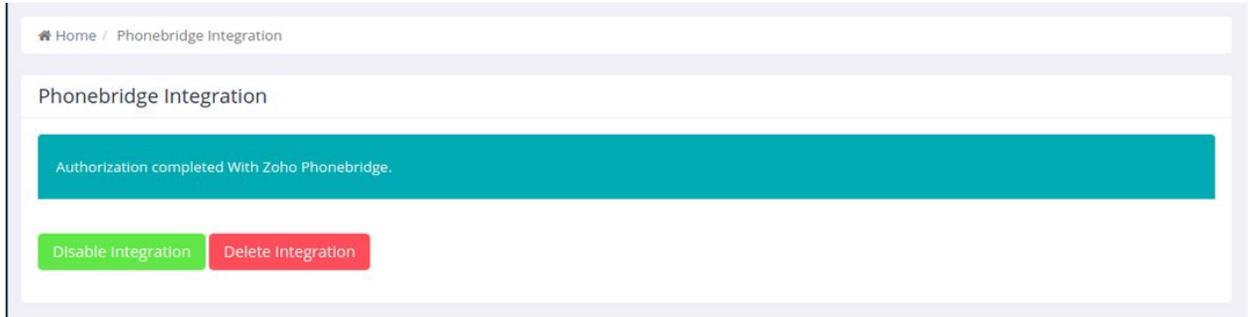
9. Once you successfully finish step 8, click on **Proceed** button to complete authorization.



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.

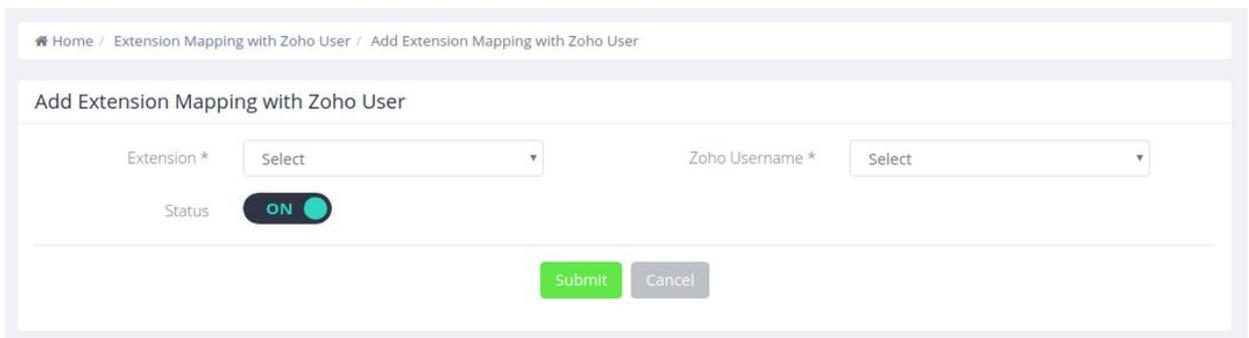


## **Step 2 : Associate HoduPBX Extension with Zoho CRM Users**

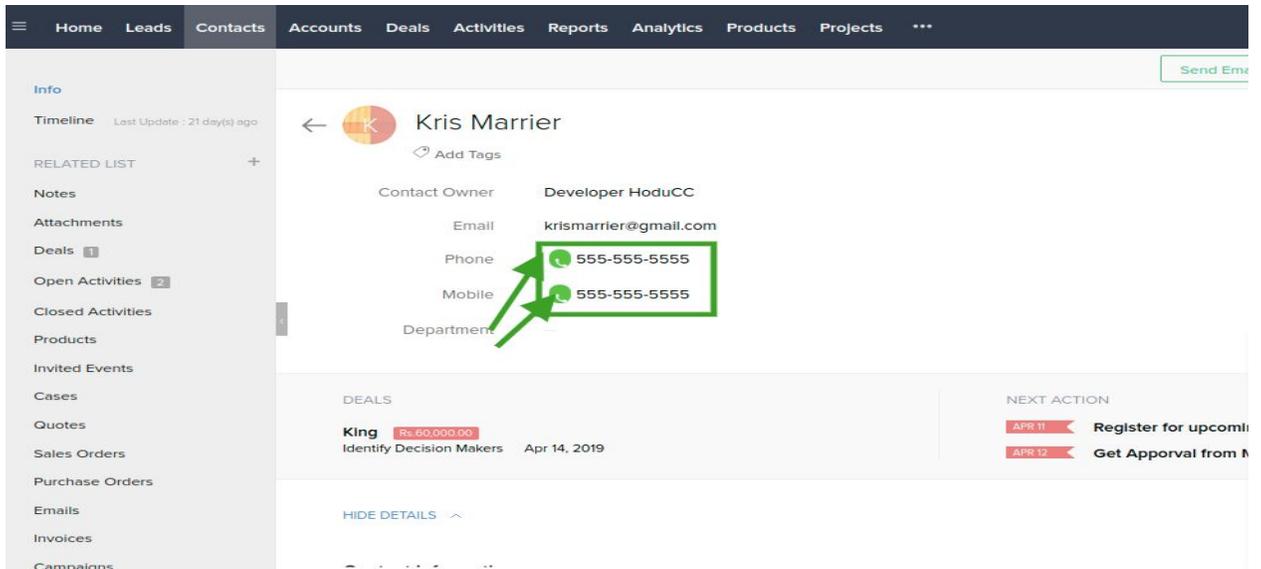
1. Click Extension Mapping link on the left side menu bar. Click the **Add new** button at the top right.



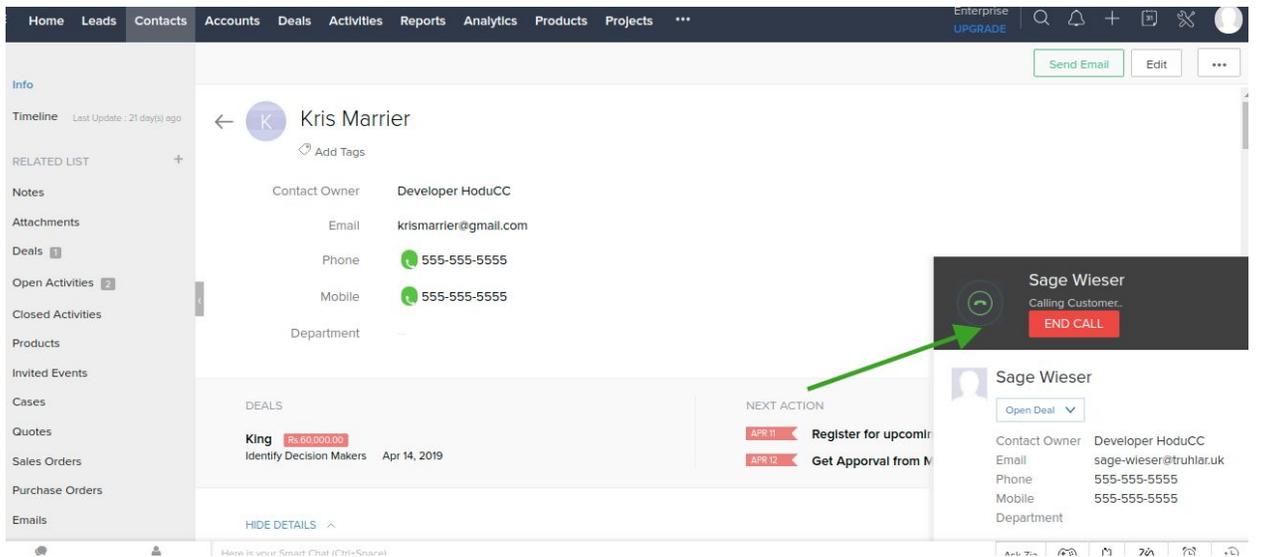
2. Select **Extension**, **Zoho Username** in dropdown. Set status as **On** to enable the integration status by default.



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.



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



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

The screenshot displays the Zoho CRM interface. At the top, there is a navigation bar with tabs for Home, Leads, Contacts, Accounts, Deals, Activities, Reports, Analytics, Products, and Projects. The 'Contacts' tab is active. Below the navigation bar, there is a search bar and a 'Filter Contacts By' section on the left. The main area shows a list of contacts in a canvas view. The contacts listed are:

- Niids Khakhkhar / n/a (906) 738-0773 / (906) 738-0773
- Nids Khakhkhar / n/a (906) 738-0773 / (906) 738-0773
- Kris Marrier / n/a (906) 738-0773 / (906) 738-0773
- Sage Wieser / n/a (906) 738-0773 / (906) 738-0773

A call popup is visible on the right side of the screen, showing a call in progress for Sage Wieser. The popup includes a 'Calling..' status and a 'Sage Wieser' profile card with the following details:

- Contact Owner: Developer HoduCC
- Email: sage-wieser@truhlar.uk
- Phone: 555-555-5555
- Mobile: 555-555-5555
- Department: (blank)

The bottom of the screen shows a status bar with 'Here is your Smart Chat (Ctrl+Space)' and a 'Ask Zia' button.