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Wildix PBX for Zoho CRM integration Guide

 This guide explains how to enable Wildix Integration with Zoho CRM.

Available starting from WMS 4.01.

Created: December 2018

Permalink: <https://confluence.wildix.com/x/2IPIAQ>

Description

Wildix integration for Zoho CRM facilitates the business processes, reduces the human latency and automates the daily tasks, enabling the employees to place and receive calls directly within their Zoho CRM accounts. Supported features:

- Incoming call pop-ups with contact information
- Click-to-call from Zoho CRM
- Call logging
- Possibility to schedule follow-up activities once the call is ended

Requirements

The integration works only with Standard, Professional and Enterprise Zoho PhoneBridge account (not available for Free accounts).

In WMS Network the integration can be enabled only on the PBX Server.

After changing extension of any user from Zoho CRM, the integration should be disabled and enabled again to sync the new data.

Set up the integration

To start using the integration, follow the steps:

Step 1. Import Zoho CRM users into Wildix PBX:

1. Log in to WMS as admin user
2. Go to WMS *Users*
3. Click **Import**

4. Select *ZohoCRM* as backend
5. Click **Login**
6. Confirm access to Zoho CRM accounts from Wildix application
7. Click **Save** and then **Import**
8. After users have been imported, select each user one after another and click **Set password** to set new passwords instead of the automatically generated passwords

Step 2. Enable Zoho CRM integration on Wildix PBX

1. Go to *WMS Settings PBX CRM integrations*
2. Under *Zoho CRM Integration* click **Enable**
3. Authorize access in Zoho CRM
4. Confirm access to Zoho PhoneBridge from Wildix application

Once you have completed these two steps, users can:

- receive an incoming call pop-up with contact information and call details
- decline an incoming call
- click-to-call from Zoho CRM Contacts by clicking on a green handset icon near the contact's phone number