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Wildix PBX for Zoho Products integration Guide


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

Available starting from WMS 4.01.

Updated: September 2019

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

- [Description](#)
- [Requirements](#)
- [First time setup](#)
- [Upgrade instructions to Wildix - Zoho PhoneBridge integration](#)

 Starting from January 2020 support for API version 2 will be discontinued!

[Upgrade to API version 3](#)

Description

Wildix integration for Zoho Products facilitates the company's business processes, reduces human latency and automates daily tasks, enabling employees to place and receive calls directly from their Zoho Products.

Supported features:

- Incoming call pop-ups with contact information
- Click-to-call from Zoho Products
- 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 on the Zoho side, the integration should be disabled and enabled again to sync the new data.

First time setup

To start using the integration, follow the steps:

In your Zoho account under Setup -> Channels -> Telephony , "Enable PhoneBridge" will be available. The administrator has to click on "Enable PhoneBridge" to enable PhoneBridge for their Organization.

Step 1. Import users from Zoho account into Wildix PBX:

1. Log in to WMS as admin user
2. Go to WMS *Users*
3. Click **Import**
4. Select *Zoho* as backend
5. Click **Login**
6. Confirm access to Zoho 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 integration on Wildix PBX

1. Go to WMS *Settings PBX CRM integrations*
2. Under *Zoho Integration* click **Enable**
3. Authorize access in your Zoho account
4. Confirm access to Zoho 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 Contacts by clicking on a green handset icon near the contact's phone number

Upgrade instructions to Wildix - Zoho PhoneBridge integration

1. Disable existing Wildix - Zoho integration on the Wildix side (WMS *Settings PBX CRM Integrations*)
2. Log out from your Zoho account in the Import dialog (WMS *Users Import Backend Zoho logout*)
3. In your Zoho account under *Setup -> Channels -> Telephony* , "Enable PhoneBridge" button becomes available. The administrator has to click on **Enable PhoneBridge** to enable PhoneBridge for their Organization.
4. In WMS log in and import users again in the Import dialog (WMS *Users Import Backend Zoho*)
5. Re-enable Wildix - Zoho integration on the Wildix side (WMS *Settings PBX CRM Integrations*)