CRM
INFO

User instructions for the CloudCTI for Zoho app for:

Zoho

Prerequisites

Zoho user account of at least 'Standard' edition
CloudCTI user account

Key features

- Click-to-dial enabled for every phone number field in Zoho.
- Caller recognition on incoming calls.
- Automatic logging of calls in Timeline and Calls tabs with possibility to add notes and a subject.
- Quickly call contacts with speed dial.
- Quickly create contacts, accounts and leads.

App usage

Open the CloudCTI for Zoho app by clicking the phone icon in the bottom-right corner of the screen and enter your CloudCTI credentials. After logging in, the app will look as follows:
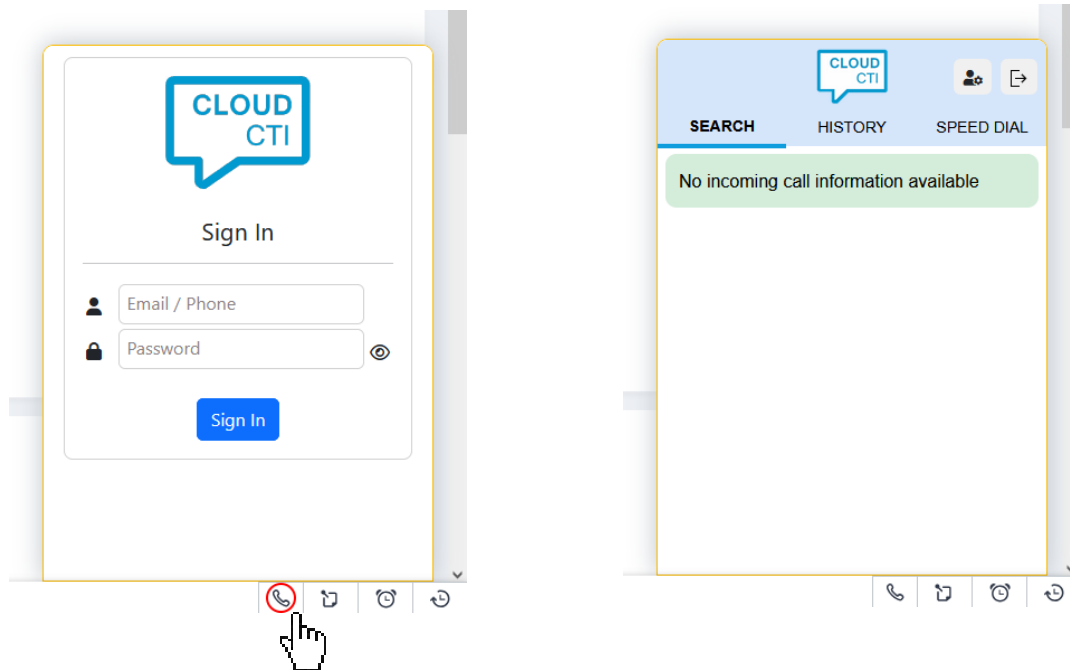
Search tab

The Search tab is the screen that is shown when initially opening the CloudCTI for HubSpot app. When receiving or making a call, multiple functions become available to the user, which are listed below.

1. Options: used to select the app language and view info about the signed-in user.
2. Logout: returns the user to the sign in screen and disables call recognition.
3. Copy number: copies the recognition's phone number to clipboard.
4. Call back: call back the current recognition.
5. Create lead: creates a new lead and opens a tab to edit it within Zoho.
6. Create contact: creates a new contact and opens a tab to edit it within Zoho.
7. Create company: creates a new company and opens a tab to edit it within Zoho.
8. Recognition select: when a phone number matches with multiple records, this dropdown becomes available. From it, the user can select which lead, contact or company they would like to save the call to. When no recognition is present, this field is left out.
9. Record navigation: opens a new tab to the selected recognition's page.
10. Notes field: can be used to write notes about the call.
11. Save call: adds the current notes to the call history of the selected recognition. Changing recognition and saving again also removes the saved notes from the previous recognition. This button is automatically pressed at the end of a call, and just before a new call starts to prevent notes from being lost.
12. View note: opens a new tab to the current call object on the selected recognition's page.
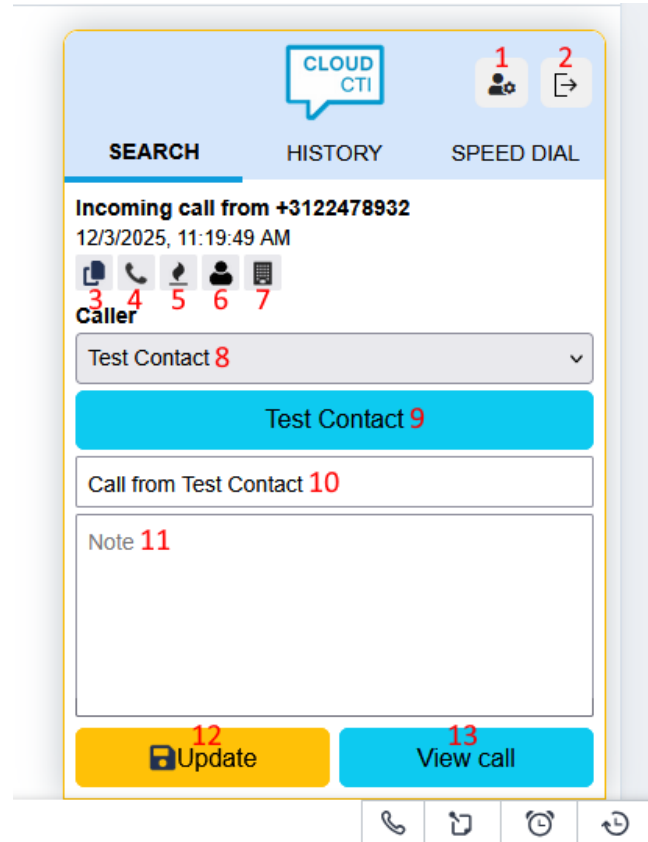
History tab

After a call is ended, it is added to the call history. At any time, the 50 newest calls are saved. Below, we list the functionalities that come with the call history entries.

1. Search: filter the call history based on the entered text. Matches on full name and phone number.
2. All call types: do not impose a filter on call direction.
3. Outgoing: only show calls made by the user.
4. Incoming: only show calls received by the user.
5. Options: Fold out options for selected call.
6. Call back: make a call to the selected entry.
7. Copy number: copy number to clipboard.
8. Remove from view: remove entry from history.
9. Add to/remove from speed dial: add or remove contact/company to or from speed dial, see 'Speed dial' in the section below for details. Speed dials can also be removed from the Speed Dial tab
10. Call: make a call to the selected entry. Identical to nr. 6 'Call back'.
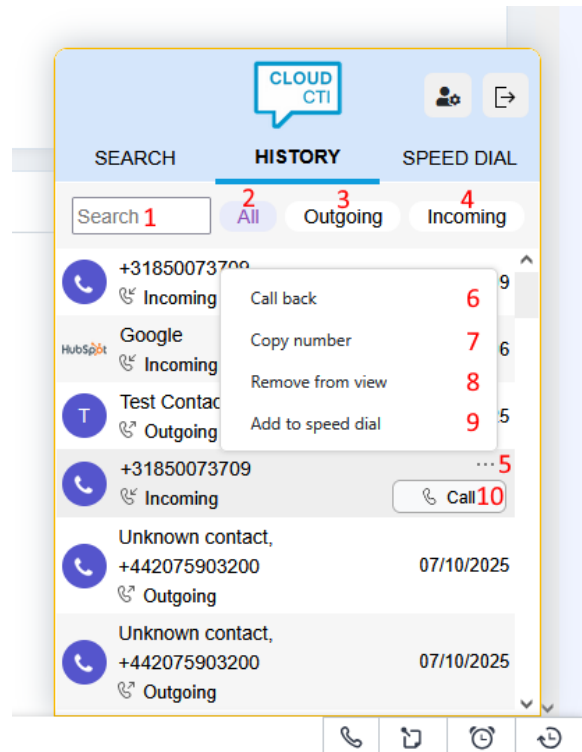
Speed dial

Speed dials can be added from the call history to quickly call select contacts and companies. Below, the features of this tab are explained.

1. Options: Fold out options for selected call.
2. Call: make a call to the selected entry.
3. Call back: make a call to the selected entry. Identical to nr. 2 'Call'.
4. Copy number: copy number to clipboard.
5. Remove from speed dial: remove contact/company from speed dial. This can also be done from the History tab.