

Bonvoice Solutions Pvt Ltd

Zoho Phone bridge integration steps

Steps :

1. Go to pbx.bonvoice.com in the browser.
2. Login with the username and password.
3. Expand menubar and navigate to “Add Agents” menu under Department
4. Fillup the following fields.
 - a) Agent user name
 - b) Mobile number prefixed with 0
 - c) Email ID
 - d) Password
5. Click on create (Two agents are added in the video)
6. Navigate to “Add Department” Menu under Department
7. Fillup the following fields.
 - a) Department Name
 - b) Description (optional)
 - c) Ring strategy as Linear
 - d) Failover detination as Terminate call
 - e) Check Enable Call Recording option
 - f) Check Sync CRM option
 - g) Max waiting time - 120 seconds
 - h) Max callers - 5 seconds
 - i) Agent time out - 25 seconds
 - j) Retry Interval – 1 seconds
 - k) Select agent users and click add
8. Click on create
9. The next step is to configure an inbound call route to the newly created department. Navigate to “Route” menu under inbound route.
10. Click on “Add inbound route” button and fillup the following fields.
 - a) Description
 - b) DID

- c) Select call type as Hide Number
 - d) Select destination as Department
 - e) Select departemt name
 - f) Select the DID Again
 - g) Check Enable External API Response
11. Open a new tab and navigate to Zoho CRM and login with the admin credentials.
 12. Navigate to Marketplace. Search and install Bonvoice Cloud Telephony For Zoho APP and logout.
 13. Switch back to Bonvoice app and navidate to “Zoho CRM” Menu under Integrations and toggle on the “Enable Integration” button. On toggle the page will redirected to Zoho authentication page and click on “Accept” button. Then the page will redirect to integration success page.
 14. Switch back to Bonvoice app and navigate to “Zoho CRM” Menu under Integrations to add the first agent.
 15. Enter Zoho agent name and 10 digits mobile number.
 16. Klik on save
 17. On the new popup appeared, click on start integration option. This will redirect to Zoho login page and login with concerned agent credentials. After login the page will redirected to Zoho authentication page and click on “Accept” button. Then the page will be redirected to the integration success page.
 18. On the new page click on “Back to bonvoice” button and the page willl redirected to bonvoice application.
 19. Open a new tab and navigate to zoho crm page and sign out the currently logged in user.
 20. Back to bonvoice and navigate to “Zoho CRM menu under” Integrations to add the second agent.
 21. Fillup agent name and mobile number and click on save.
 22. From the pop up, click the start integration button. This will redirect to Zoho login page and login with the second agent credentials. After login the the page will redirected to zoho authentication page and click on “Accept button”. Then the page will be redirected to integration success page. Click “Back to bonvoice” button.
 23. Now the integration for two agents are completed and status visible as active. More agents can be added based on the requirements.
 24. To enable/disable click 2 dial feature, use activate/deactivate button in the agent list.
 25. To disable the entire integration delete all agents from the list. To check weather the integration is disabled successfully, login to Zoho CRM Admin account and navigate to Settings > Telephony. If the bonvoice app is not appearing in installed app list the deactivation is successfull.