

Zoho Integration with VoxPro

Procedures

1. Send an ZOHO integration request mail to support@voxprosolutions.com
2. Download and Install the Softphone
3. Enable Zoho in the VoxPro market place
4. Map Zoho users to VoxPro Extensions/Users

1. Download and Install the Softphone

- Use below link to Download 3cx softphone.

<https://downloads.3cx.com/downloads/3CXPhone6.msi>

- Open the downloaded setup file and install the 3cx softphone.
- Click on the '**Create Profile**' to create a sip account then click on '**New**' to add credentials of sip.
- Register User extension.



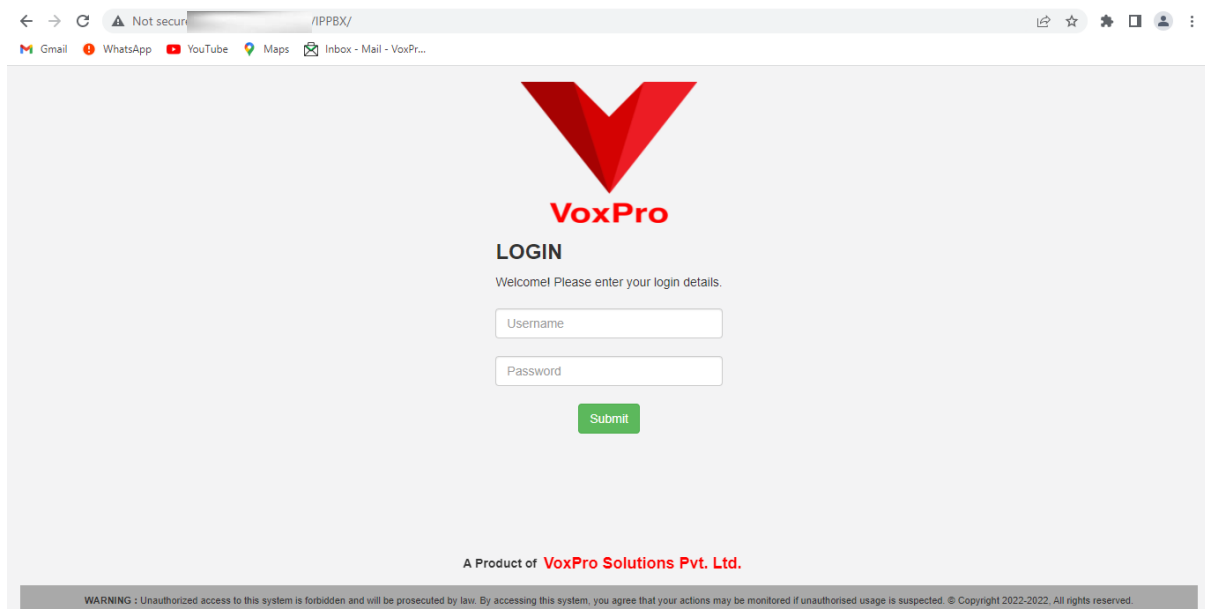
The Softphone shows “On Hook” on the screen, then the sip account is created successfully.

2. Enable Zoho in the VoxPro market place

- Use the below link to enter the VoxPro login page.


https://voxprosolutions.com/Phone_Bridge.php

- Enter the Username “admin” and Password “demo” then click on **‘Submit’** to login the page.



← → ↻ Not secure /PPBX/

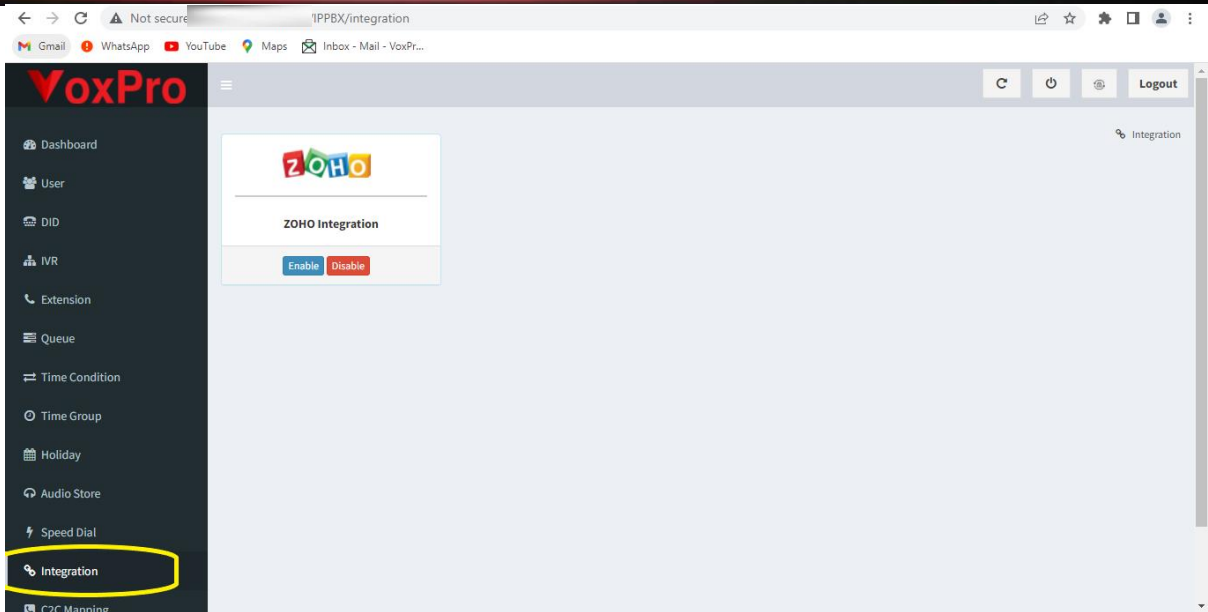
Gmail WhatsApp YouTube Maps Inbox - Mail - VoxPr...


VoxPro
LOGIN
Welcome! Please enter your login details.

A Product of **VoxPro Solutions Pvt. Ltd.**

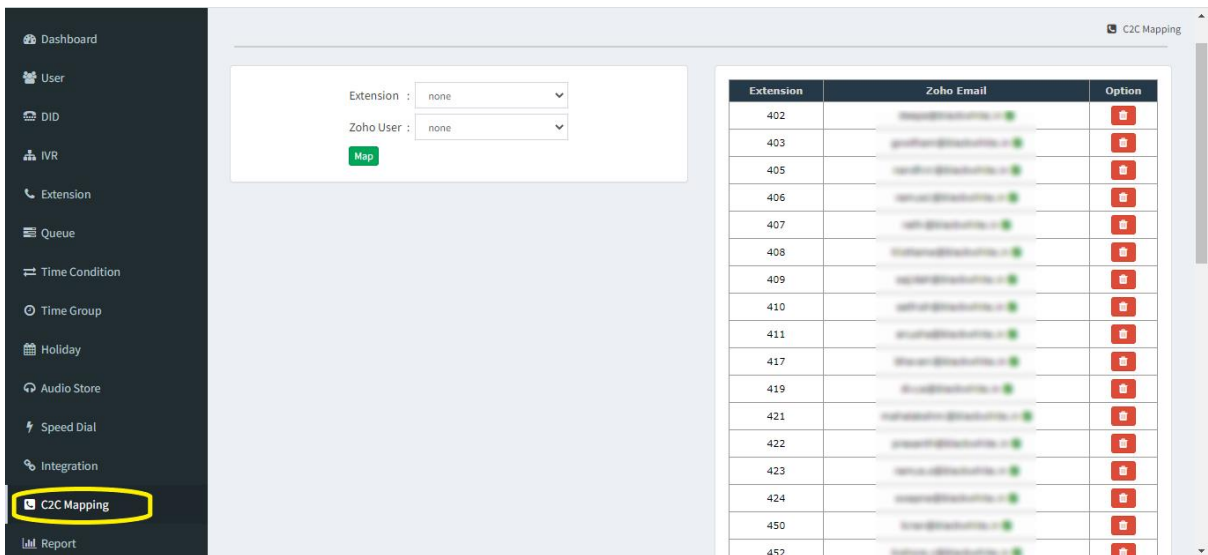
WARNING : Unauthorized access to this system is forbidden and will be prosecuted by law. By accessing this system, you agree that your actions may be monitored if unauthorised usage is suspected. © Copyright 2022-2022. All rights reserved.

- Select **‘Integration’** and click on **‘Enable’** button to integrate with Zoho.



3. Mapping Zoho users with VoxPro Extensions/Users

Select 'C2C Mapping', then choose Extension number and select Zoho user and then click on the 'map' button to enable clicktocall and other call notifications.



Call Flow

Inbound Call notification :

The screenshot displays a CRM interface with a dark header containing navigation tabs: CRM, Home, Leads, Contacts, Accounts, Deals, Tasks, Meetings, Calls. On the right, it shows 'Enterprise-Trial UPGRADE' and search/notification icons. Below the header, there's a 'Filter Leads by' section with a search bar and 'System Defined Filters' (Touched Records, Untouched Records, Record Action, etc.). A mobile phone overlay shows an 'Incoming calls' notification from '+919972957633'. The main area features a table of leads with columns: Name, Company, Email, Phone, and Status. A contact information popup for 'Ramesh Rai' is visible, showing details like 'Lead Owner: Manjunath', 'Email: ramesh@gmail.com', 'Phone: +91 8050890716', and 'Lead Status: Lost Lead'.

Name	Company	Email	Phone	Status
Ramesh Rai	Alpha Technologies	ramesh@gmail.com	+91 8050890716	Cold
Carissa Kidman (Sample)	Oh My Goodknits Inc	carissa-kidman@yahoo.com	555-555-5555	Adve
James Merced (Sample)	Kwik Kopy Printing	james-merced@gmail.com	555-555-5555	Web
Tresa Sweely (Sample)	Morlong Associates	tresa-swee		
Felix Hirpara (Sample)	Chapman	felix-hirpa		
Kayleigh Lace (Sample)	Printing Dimensions	kayleigh-la		
Yvonne Tjepkema (Sample)	Grayson	yvonne-tjepkema@		
Michael Ruta (Sample)	Runklev Miller & Wright	michael-ro		

Outbound: Click to Dial

This screenshot is similar to the one above, showing the same CRM interface. The mobile phone overlay now shows an 'Incoming calls' notification from '8050890716'. The lead list is the same, but the contact information popup for 'Ramesh Rai' now indicates 'Connecting...'. The interface elements, including the header, filters, and table, are consistent with the previous image.

CRM Home Leads Contacts Accounts Deals Tasks Meetings Calls ... Enterprise-Trial UPGRADE

All Leads Create Lead Actions

Total Records 10 50 Records Per Page 1 - 10

Filter Leads by

System Defined Filters

- Touched Records
- Untouched Records
- Record Action
- Related Records Action
- Scoring Rules
- Latest Email Status
- Activities
- Notes
- Campaigns

Filter By Fields

Lead Name All Company Email Phone

Ramesh Rai	Alpha Technologies	ramesh@gmail.com	+91 8050890716	Cold
Carissa Kidman (Sample)	Oh My Goodknits Inc	carissa-kidman@yahoo.com	555-555-5555	Adve
James Merced (Sample)	Kwik Kopy Printing	james-merced@gmail.com	555-555-5555	Web
Teresa Sweely (Sample)	Morlong Associates	tresaswee		
Felix Hirpara (Sample)	Chapman	felix-hirpa		
Kayleigh Lace (Sample)	Printing Dimensions	kayleigh-la		
Yvonne Tjepkema (Sample)	Grayson	yvonne-tjepkema@		
Michael Ruita (Sample)	Burklev Miller & Wright	michael-er		

3CXPhone

16:26:31 201

8050890716

Connected 00:00:03 Available

Line 1 Line 2 Line 3 Line 4 Line 5

1 2 3

4 5 6

7 8 9

0 * #

Hold Transfer

Ramesh Rai Alpha Technologies Calling customer...

Contact Information

Lead Owner Manjunath

Email ramesh@gmail.com

Phone +91 8050890716

Mobile +91 9972957633

Lead Status Lost Lead

Here is your Smart Chat (Ctrl+Space)

Ask Zia

Call logs at ZOHO

CRM Home Leads Contacts Accounts Deals Tasks Meetings Calls ... Enterprise-Trial UPGRADE

All Calls Create Call Actions

Total Records 19 50 Records Per Page 1 - 19

Filter Calls by

System Defined Filters

- Touched Records
- Untouched Records
- Record Action
- Related Records Action

Filter By Fields

- Call Agenda
- Call Duration
- Call Duration (in seconds)
- Call Owner
- Call Purpose

<input type="checkbox"/>	Subject All	Call Type	Call Start Time	Call Duration	Related To
<input type="checkbox"/>	Outgoing call to Ramesh Rai (8050890716)	Outbound	Dec 28, 2021 04:17 PM	00:00	Ramesh Rai
<input type="checkbox"/>	Missed call from Ramesh Rai (9972957633)	Missed	Dec 28, 2021 03:49 PM	00:00	Ramesh Rai
<input type="checkbox"/>	Missed call from Ramesh Rai (9972957633)	Missed	Dec 28, 2021 03:48 PM	00:00	Ramesh Rai
<input type="checkbox"/>	Incoming call from Ramesh Rai (9972957633)	Inbound	Dec 27, 2021 05:25 PM	00:11	Ramesh Rai
<input type="checkbox"/>	Incoming call from Ramesh Rai (9972957633)	Inbound	Dec 27, 2021 04:49 PM	00:07	Ramesh Rai

Here is your Smart Chat (Ctrl+Space)

Ask Zia

For any assistance, please Contact us:

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