Zoho Corporation

Native integrations with Zoho and ManageEngine apps

Integrate Zoho Voice with Zoho CRM, Desk, Bigin, and ManageEngine ServiceDesk Plus Cloud

Zoho Voice offers native integrations for Zoho CRM, Desk, Bigin, and ManageEngine ServiceDesk Plus Cloud (SDP Cloud) using which you can make and receive calls directly from those apps via the ZDialer.

What you get in this integration

- Get caller details in screen pop-ups from CRM/Desk/Bigin/SDP Cloud and find out who's on the line.
- Make and receive calls directly from Zoho CRM/Desk/Bigin/SDP Cloud using ZDialer.
- Auto-detect phone numbers in CRM/Desk/Bigin/SDP Cloud and make calls using click-to-call.
- Bulk import CRM/Desk/Bigin/SDP Cloud agents to create them as Zoho Voice users.
- Automatically log the calls made from the phone numbers you use. (*Note: This functionality is not available in SDP OD*)

Setting up the integration

The integration enables contacts look-up functionality when you make and receive calls from the dial pad in Zoho Voice web or mobile apps. Click-to-call, dial pad and incoming call pop-ups in CRM/Desk/Bigin/SDP Cloud will be enabled only through ZDialer. ZDialer is supported in both Chrome, Firefox, and MS Edge browsers.

To set up this ZDialer-based integration, follow the steps below.

1. Go to **Settings > Integrations**, and choose the app you want integrate(CRM/Desk/Bigin/SDP Cloud).

2. In the setup page, choose your CRM, Desk, Bigin, or SDP Cloud portal, so Zoho Voice can fetch your contacts.

3. In the next page, click the ZDialer link for Chrome/Firefox/Edge and get the dialer for your browser from the respective store, and click **Next**. You can also download ZDialer from the links provided in this page.

4. Bulk import your agents from CRM/Desk/Bigin/SDP Cloud and add them in Zoho Voice as users so they can use this integration. Imported users will receive an email invitation to join your account. They will be added as users once they accept the invitation. You can also skip this step and import later.

5. Select and associate the phone numbers that you'll be using, so your calls are automatically logged when you made and receive calls using those numbers. This functionality is not available in SDP Cloud.

6. Click **Complete Integration** to finish the setup.

Apps and calling functionalities:

- See CRM/Desk/Bigin/SDP Cloud contact details while making and receiving calls from the dial pad in Zoho Voice web and mobile apps.
- Make calls directly from CRM/Desk/Bigin/SDP Cloud web apps using the click-to-call button powered by ZDialer. Contact details will be visible in the call pop-up.
- Make calls to unsaved numbers from any webpage(including CRM/Desk/Bigin/SDP Cloud web) using the dial pad widget powered by ZDialer. Make sure you have enabled dial pad in ZDialer settings.
- Receive incoming calls on any webpage(including CRM/Desk/Bigin/SDP Cloud web) through screen pop-ups powered by ZDialer. Caller details will be fetched from CRM/Desk/Bigin/SDP Cloud and will be displayed in the call pop-up.