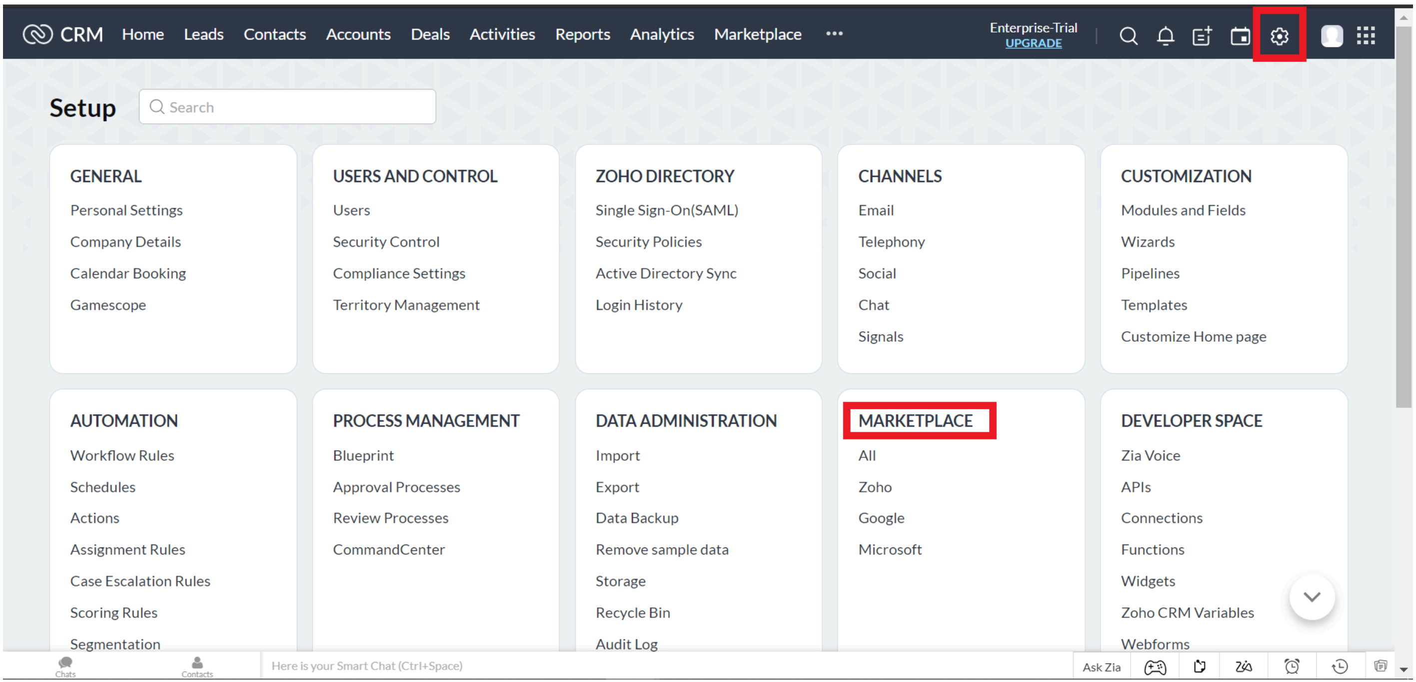
Zoho CRM

The integration with Zoho CRM will allow you to initiate an instant or scheduled remote assistance session from the Contacts or Leads module in Zoho CRM. During a session, you will be able to guide your customer's sales queries or provide necessary instructions by viewing the live camera stream and using our whole host of annotation tools.

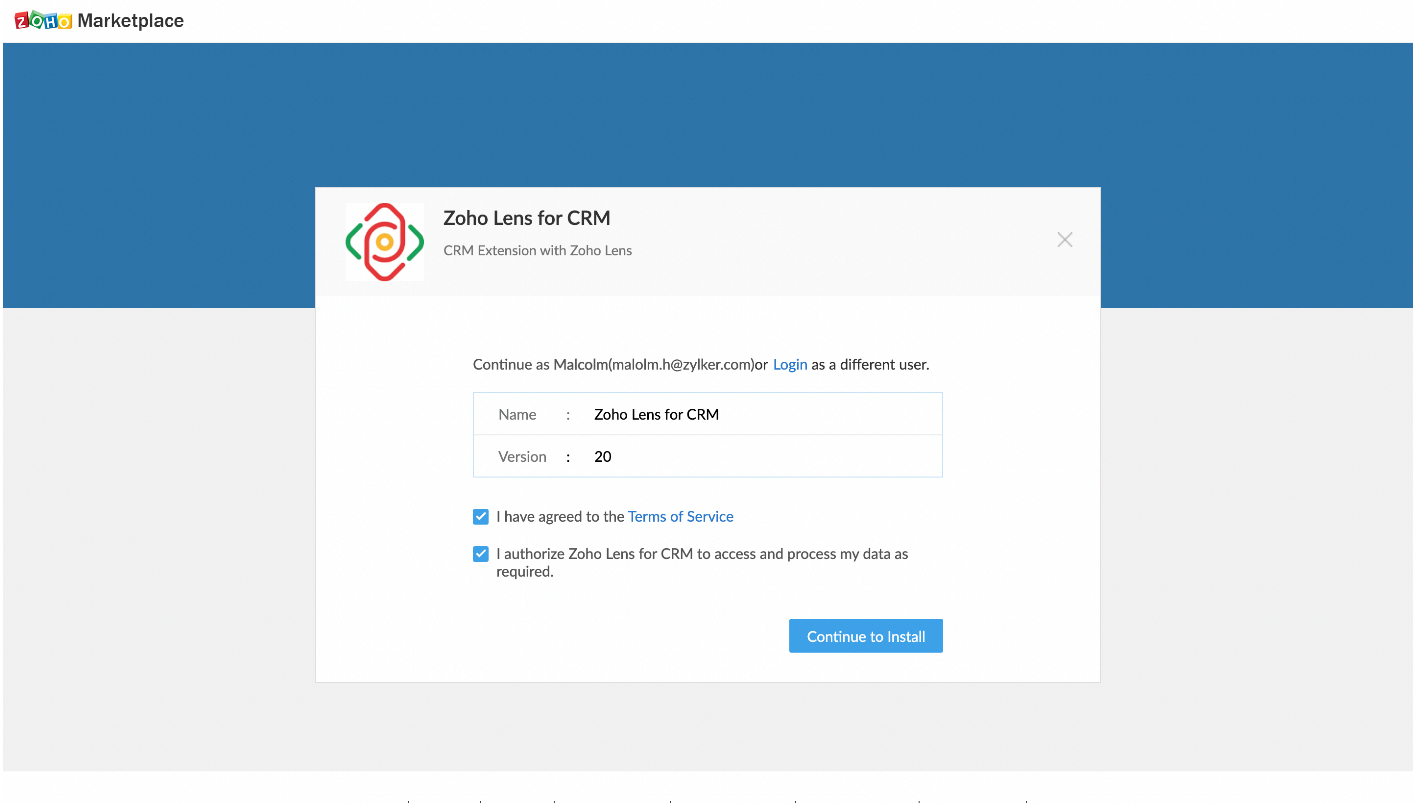
How to enable Zoho Lens for CRM?

1. Log in to your Zoho CRM account.
2. Select the Settings option from the top-left corner of the screen.
3. Navigate to the Marketplace category and choose Zoho.

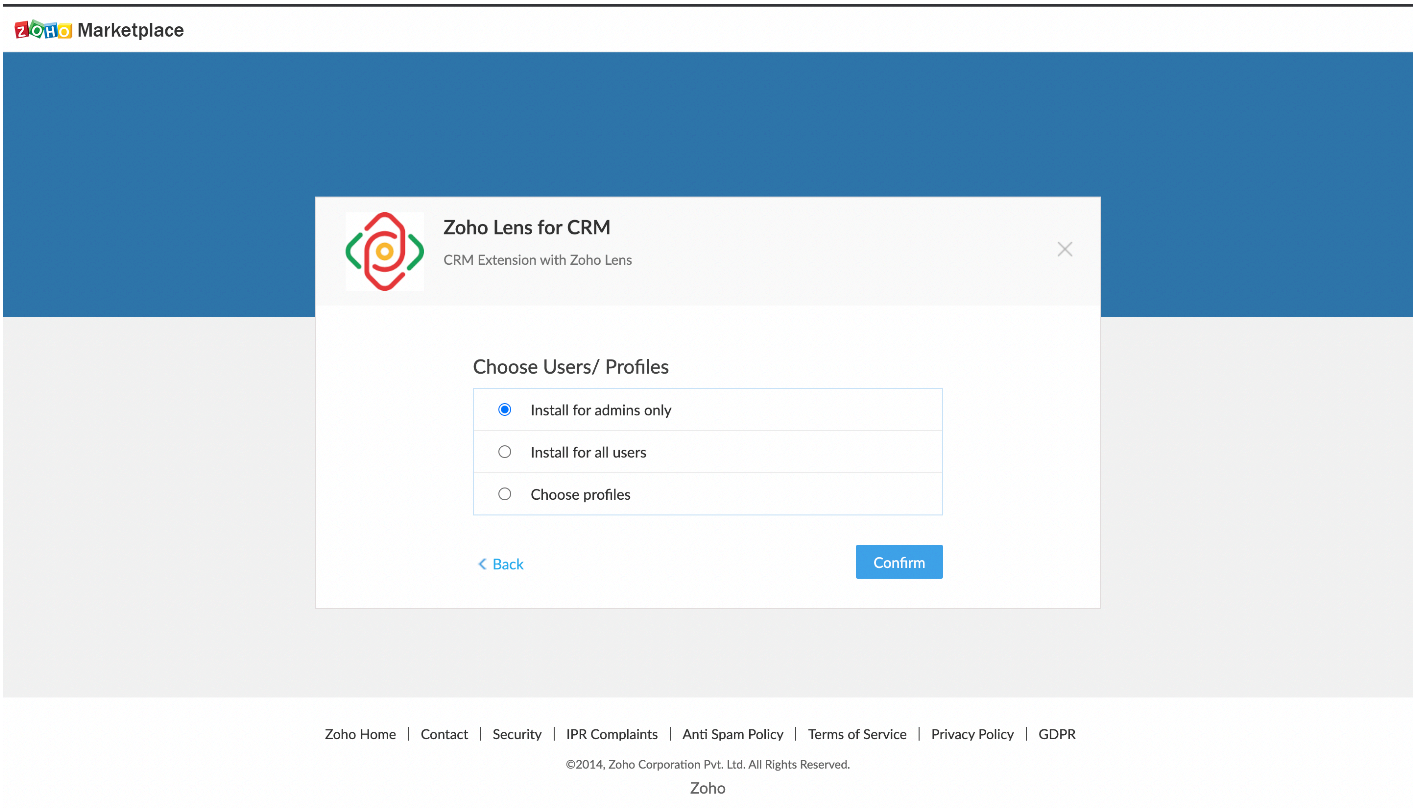


4. Under the list of extensions available below Zoho, find Zoho Lens and click the Setup Now button.
5. Agree to all the terms and conditions by enabling the checkbox next to the I have agreed to the Terms of Service option.
6. Also, authorize extension to get access to your data by checking the box available near the I authorize Zoho Lens for CRM to access and process my data as required option.

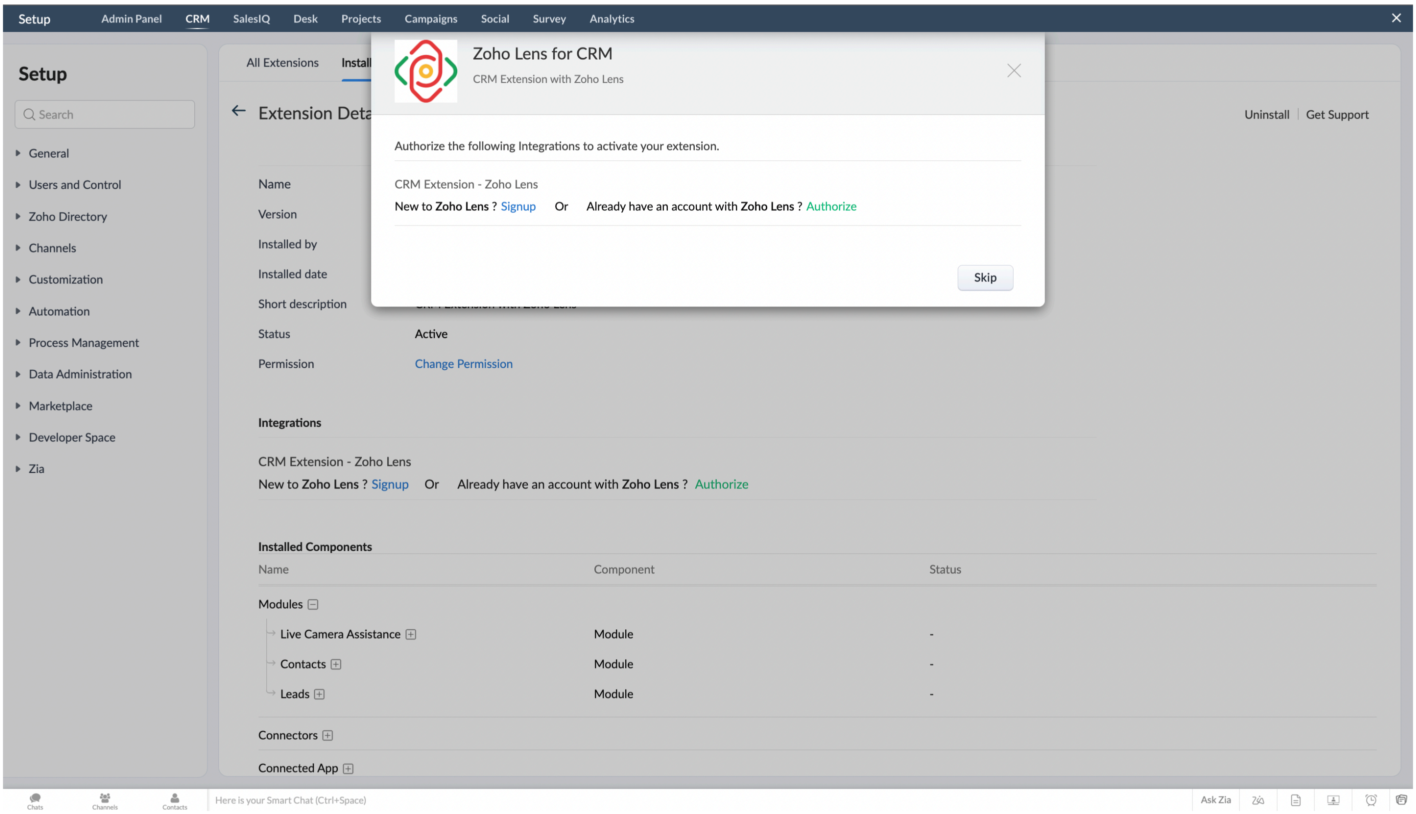
7. Click the Continue to Install button.



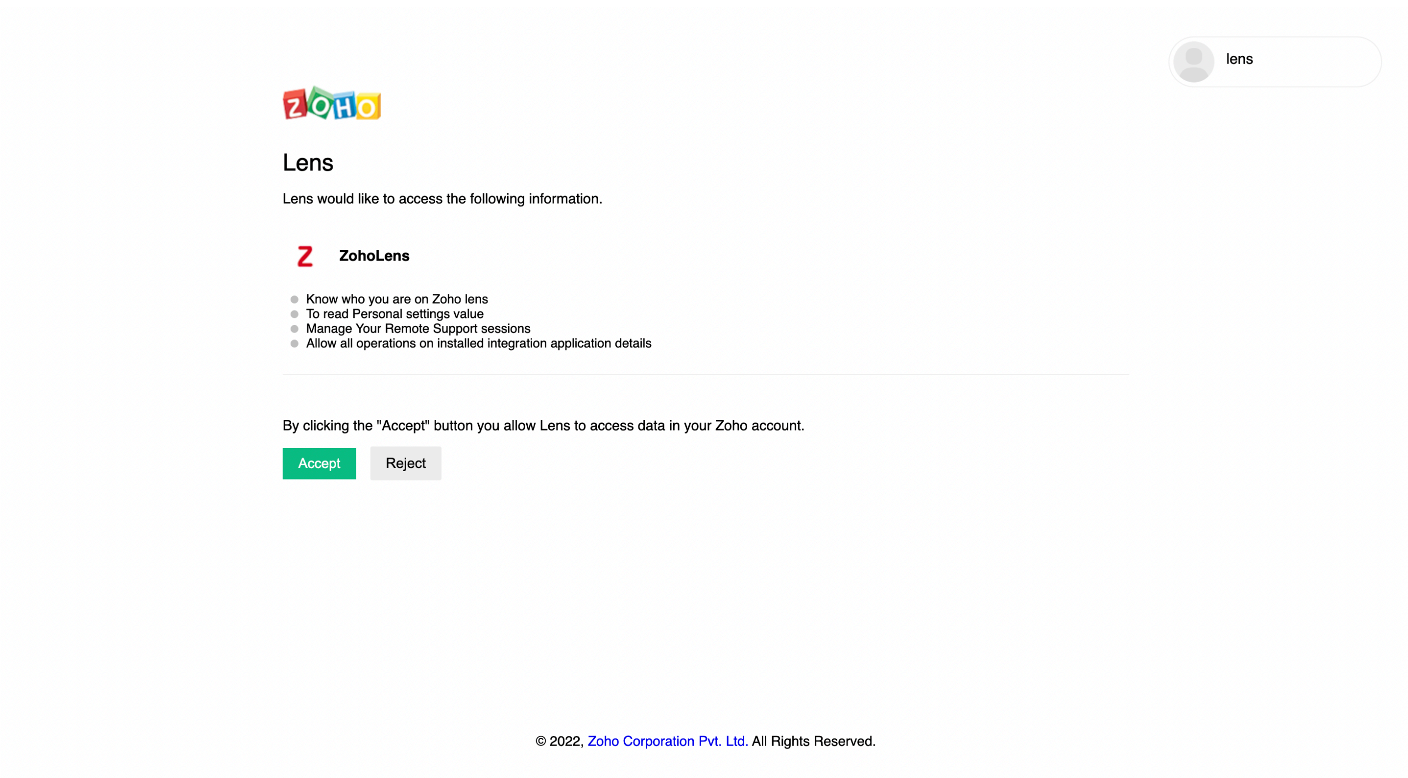
8. In the next step, choose the Users/Profiles for which you want to enable the extension for and click Confirm.



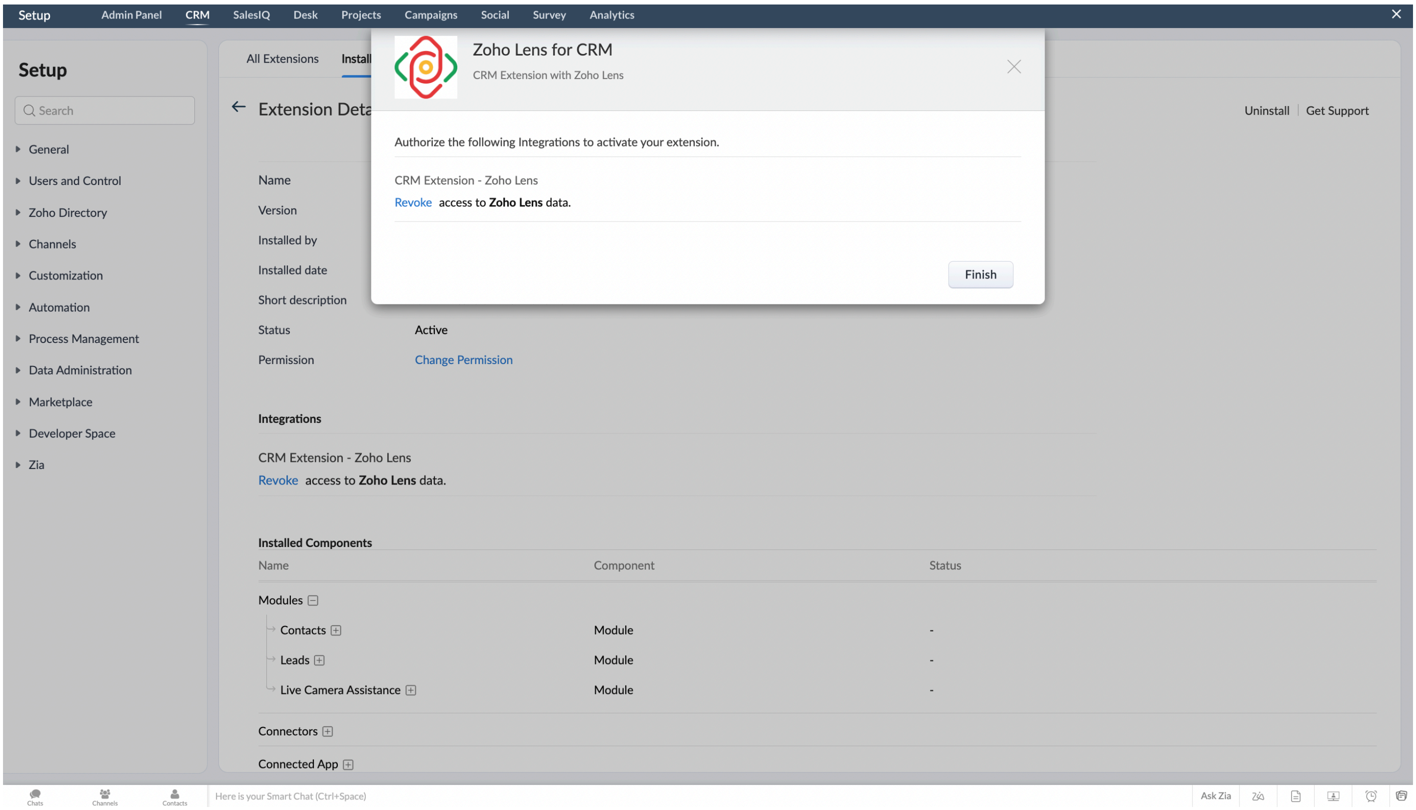
9. Click the Authorize button if you have an existing Zoho Lens account.



10. Click the Accept button to allow Zoho Lens for CRM to access all data related to your Zoho Lens account.

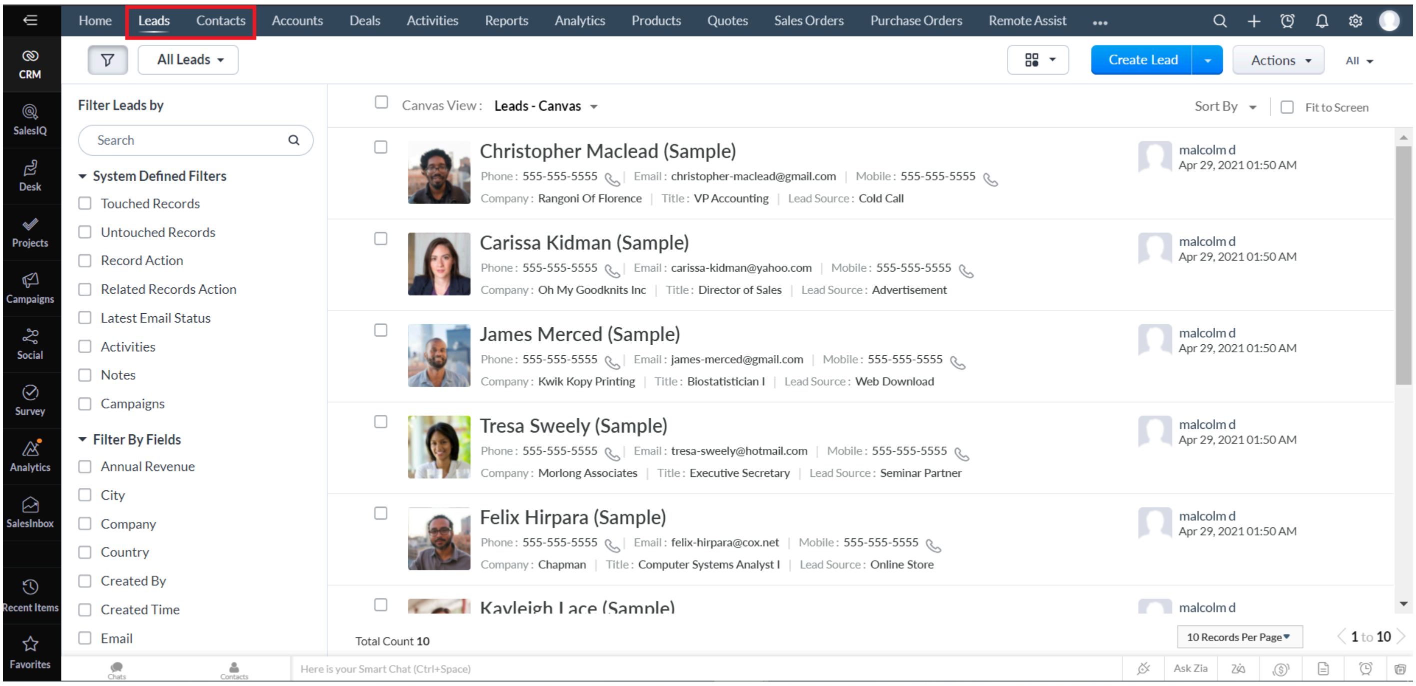


11. Click Finish. The Zoho Lens for CRM extension has now been installed successfully.

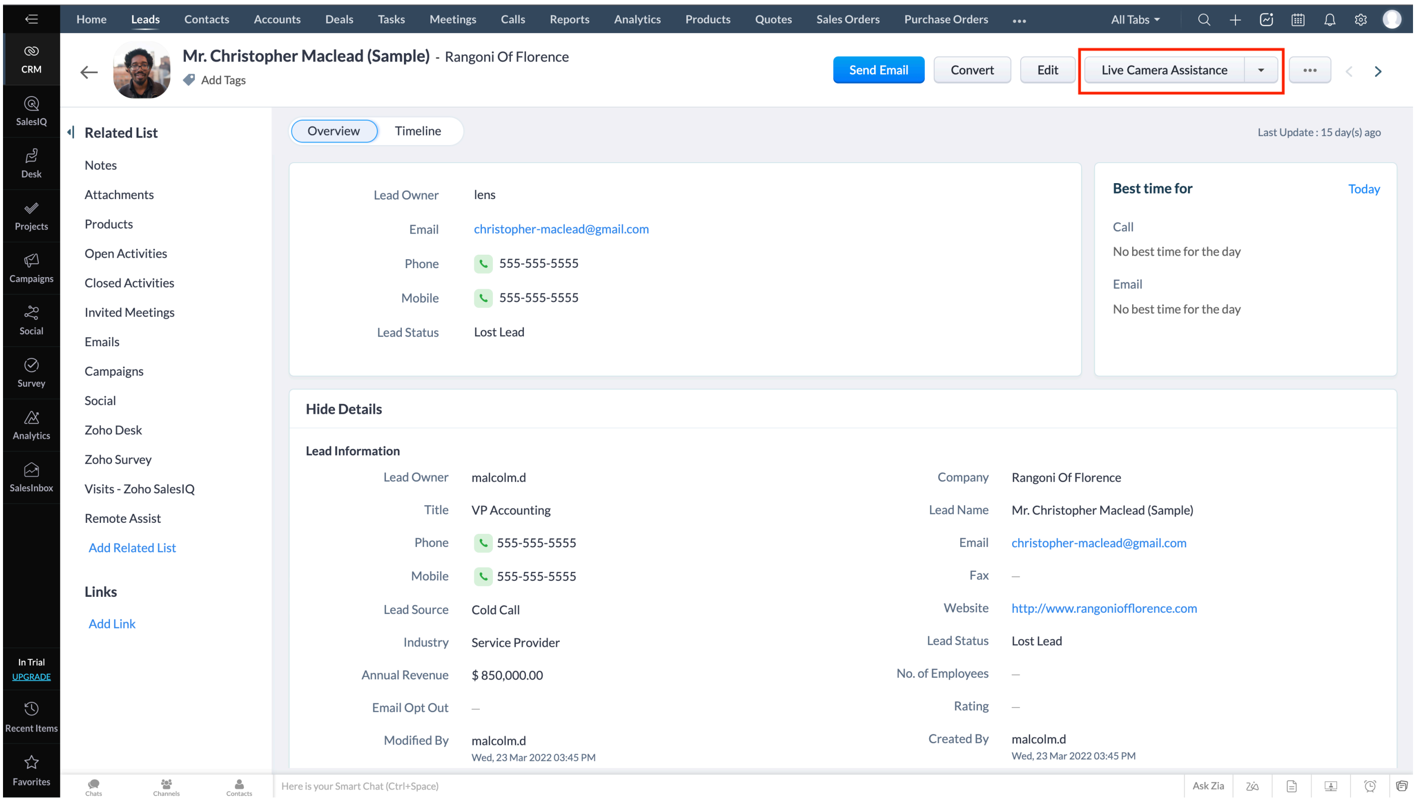


How to start a session from CRM?

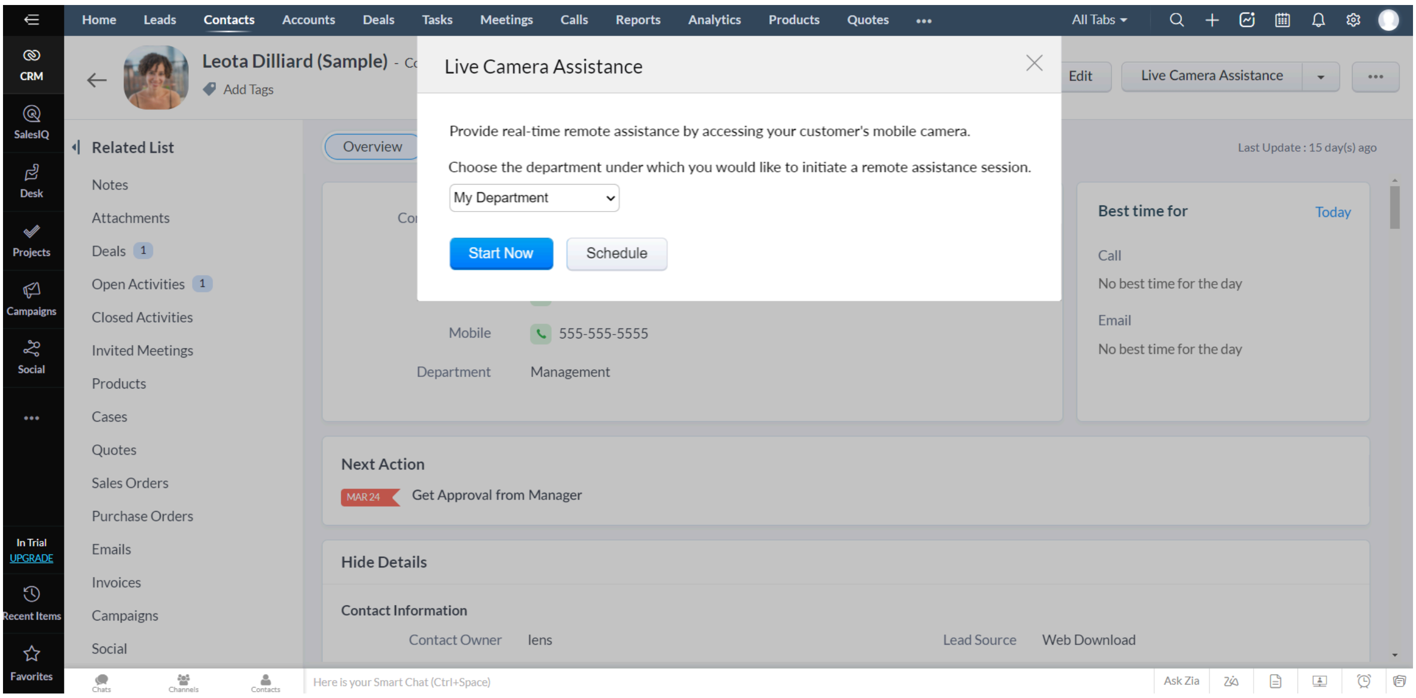
1. Go to Zoho CRM.
2. Log in to CRM using your credentials.
3. To start a session for any lead or contact, navigate to the Leads or Contacts module.



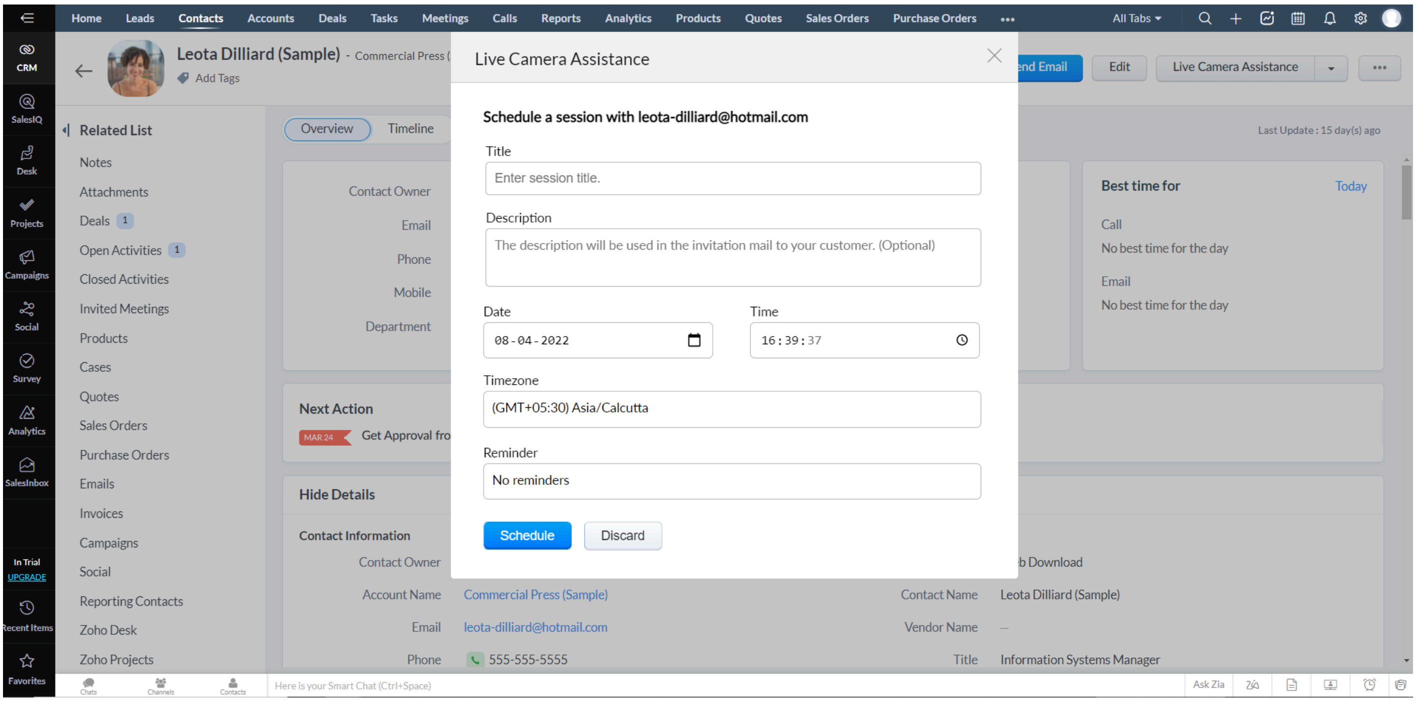
4. Select a lead or contact, then click the Live Camera Assistance option in the top-right corner.



5. Choose the default department from which you would like to start the Lens session in the proceeding window.
6. Click the Start Now button to initiate a session instantly.



7. To schedule a session, select the Schedule option and specify the necessary information.



8. You can also create a session by navigating to the Live Camera Assistance tab. Select the Create Live Camera Assistance option in the top-right corner, key in the required details.

9. To add a contact or lead after a session is scheduled, go to the Contact or Lead module. Choose a contact or lead of your choice.

10. Click the Assign option under the Live Camera Assistance section to add that contact or lead successfully.

11. You can also select the New option in the Live Camera Assistance section, then fill in the required details to create a session for any lead or contact when required.