#### RAINBOW CRM BRIDGE - ZOHO CRM CONNECTORUSER GUIDE

# Rainbow CRM Bridge ZOHO CONNECTOR User Guide



### Introduction:

The ZoHo Rainbow connector brings the following features to the CRM users:

- 1. Click to call from Leads, Contacts and Accounts records
- 2. Screen Pop (Open respective contact upon incoming telephony call)
- 3. Activity Log (Incoming and Outgoing calls)
- 4. Direct Dialling (CTI Calls)

#### Preliminary note:

Before starting using the connector make sure the Rainbow Client is being initiated successfully after entering the credentials provided by your administrator.



Subject	Due Date	Chabur	Delevites	Related To	Contact Name	Activity Owner	Labor Terr			
Register for upcoming CRM Webinars	Mar 19, 2021	Not	Low	King (Sample)	Sample)	chris knight	Tasks			
Refer CRM Videos	Mar 21, 2021	In Progress	Normal	Morlong Associates	(B. Mitsue Tollner (Sample)	chris knight	Tasks			
Competitor Comparison Document	Mar 17, 2021	Not Started	Highest	Feitz Printing Service	Capla Paprocki (Sample)	chris knight	Tasks	No Laads found		
Set Apporval from Manager	Mar 18, 2021	Not Started	Low	🖪 Chapman	Simon Morasca (Sample)	chris knight	Tasks			
Get Approval from	Mar 20,	In	Normal	Commercial	🍘 Leota Dilliard	chris knight	Tasks			
20000										Please enter the email address associated with your Rainbow account Email address * <b>D</b>
1170000										Enter your password Password *
3				£ 100,000.00						Connect
10,000					£ 70,000.0	10		£70,000.00		Keep my session alive
50000							£ 25,000.00	£ 35,000	00	Don't have an account? Signup! Learn more about Rainbow Copyright ID 2020 - ALE International
	Herek	s your Smart Ch	at ICtrl+Space	)	_					% AskZis (⊡ 10 26 10 ⊕

Enter the Rainbow credentials provided by your administrator

### 1. Click to call from Leads, Contacts and Accounts records

- A phone call can be initiated from any lead, contact or account record by clicking the green phone icon that is available against each phone number in the relevant record.
- Once you click this icon, the Rainbow Client client will propose the user to select the phone number to be called as well as proposing to reach the contact via Rainbow itself if the same contact is using Rainbow as well.

	(Sample) - King (Sample)	rts Analytics Products Quotes Sales Ordel	rs Purchase Orders Invoices Salesint	box reeds				
← Add Tags	(Sample) - King (Sample)				Send Mail Call now Edit ···· < :			
이 Related List	Overview Timeline				Last Update : a while ag			
Notes 1					Best time for Today			
Attachments	Contact Owner chris knight							
Deals 1 Open Activities 2	Email krismarrier@g	gmail.com			Call No best time for the day			
Closed Activities 10+	Phone (\$33888				Email			
Products	Mobile 0060736				☆11:00 AM			
Invited Meetings	Department <b>Engineering</b>							
Cases								
Quotes	Deals		Next Action					
Sales Orders	King £60.000.00		MAR 19 Register for upcon	ning CRM Webinars				
Purchase Orders Emails	Identify Decision Makers Mar 22, 2021		MAR 20 Get Apporval from	n Manager				
Invoices	Show Details				Q People, conversations, incidents			
Campaigns	Show Betails	Show Details						
Social	Notes	Notes Recent Last *						
Reporting Contacts	infor given to the customer about his r	acont care			Rev Agent4 Workflow called			
Add Related List	Contact - Kris Marrier (Sa • Add Note				Kris Marrier (Sample) ×			
Links	Add a note				Business phone (33888)         DIAL           Mobile phone (0607360312)         DIAL			
Add Link								
	Attachments				CAUCEL			
	No Attachment				I have customer on line, could you please help me on this case ? Mar 22, 2021 - 5:09 PM 🛇			
	Deals				Enter your text here			
A 4. A	Deal Name Here is your Smart Chat (Ctrl+Space)	Amount Stage	Proba	bility (%) Closing	Dite Sakzia (23) (1) Zá (1) tĐ			
1 - Clic	k the phone icon t	o initiate a call						
				in the Rainbo The call will b	e initiated as soon as			
				the Dial optio	n is clicked			

## 2- Screen Pop (Open respective contact upon incoming telephony call)

- When an incoming call reaches the user, the corresponding record screen will open up automatically.
   i.e. : If the caller number is an identified contact, the contact record screen will pop up.
- If the caller is not identified, the user will be proposed to create a new contact



## 3- TimeLine Activity Log (Incoming and Outgoing calls)

- Each time a user will make or receive a call, the corresponding activity will be recorded and added to the Contact timeline:
  - Type of event: Incoming or Outgoing call
  - Timestamp: Date and Time
  - User name
- If the user does not answer a call, the activity will be recorded as 'Missed Call'

CRM Home Leads Conta	acts Accounts Deals Activities Reports Feeds Campaigns Documents •••	Free <u>UPGRADE</u>   Q. ⊈. ⊑† 🖬 🕸   🕕 🏭
← Stris Marrier (San	mple) - King (Sample)	Send Email Call now Edit
Related List     Notes	Overview Timeline	Last Update : 02:06 PM
Attachments Deals 1	History	
Open Activities 2 Closed Activities 10+	8 Jun, 2021	
Invited Meetings Emails	02:06 PM Call added - Incoming Call Alert - Generated by RCB by chris knight 8 Jun, 2021	
Campaigns	7 Apr, 2021	
Social Reporting Contacts	04:45 PM Call added - Outgoing Call Alert - Generated by RCB by chris knight 7 Apr, 2021	
	04:45 PM Call added - Outgoing Call Alert - Generated by RCB by chrisk night 7 Apr, 2021	