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.



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	Enter your password
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5000 £350000	45. Don't have an account? Signup!
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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.

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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'

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