

VOYCELL Zoho CRM Integration – User Help Guide

Integration (Connecting VOYCELL with Zoho CRM)

To start using VOYCELL with Zoho CRM, the user must first connect your Zoho account with the VOYCELL application.

Begin by opening the VOYCELL application in your browser by navigating to <https://app.voycell.com/>. Log in using your registered email address and password. Once successfully logged in, you will be redirected to the main dashboard.

From the dashboard, locate the sidebar menu and click on the “**Sync & Integration**” section. Inside this section, you will find the option to connect Zoho CRM. Click on “**Connect Zoho CRM**” to initiate the integration process.

You will be redirected to the Zoho login page. Enter your Zoho CRM credentials and proceed with authentication. After logging in, Zoho will request permission to allow VOYCELL to access necessary CRM data. Carefully review the permissions and click “**Accept**” to authorize the integration.

Once authorization is completed, you will be redirected back to VOYCELL. The integration status will now display as “**Connected**”, confirming that your Zoho CRM account is successfully linked with VOYCELL.

Functionality (Using VOYCELL with Zoho CRM)

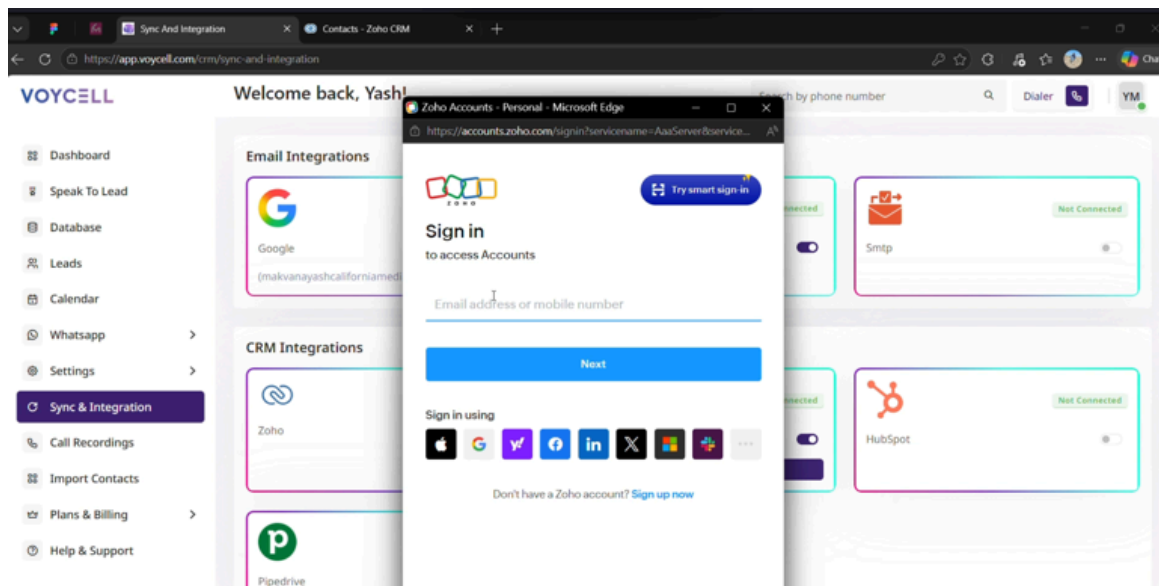
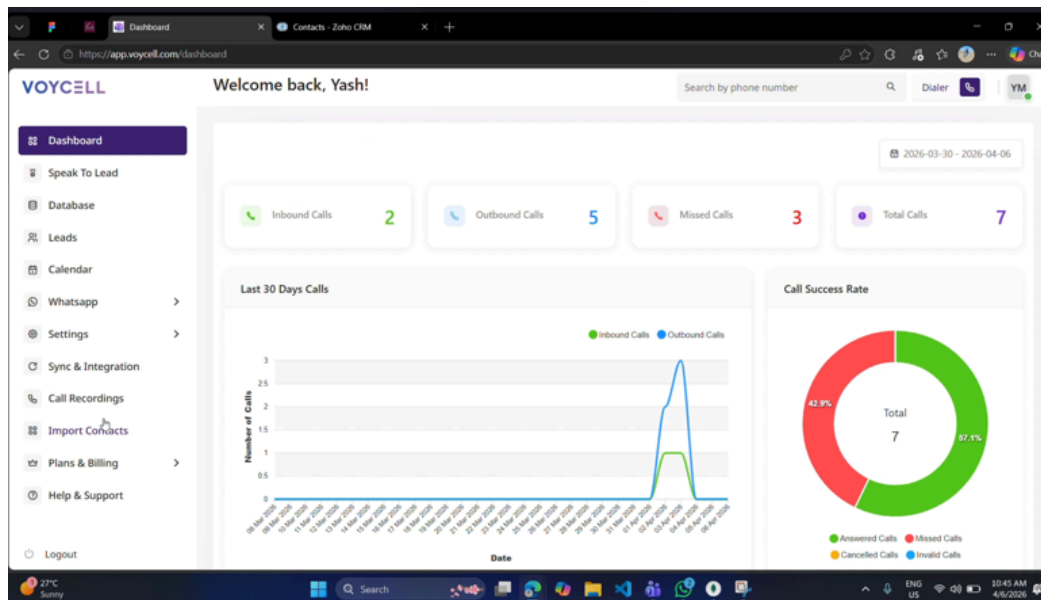
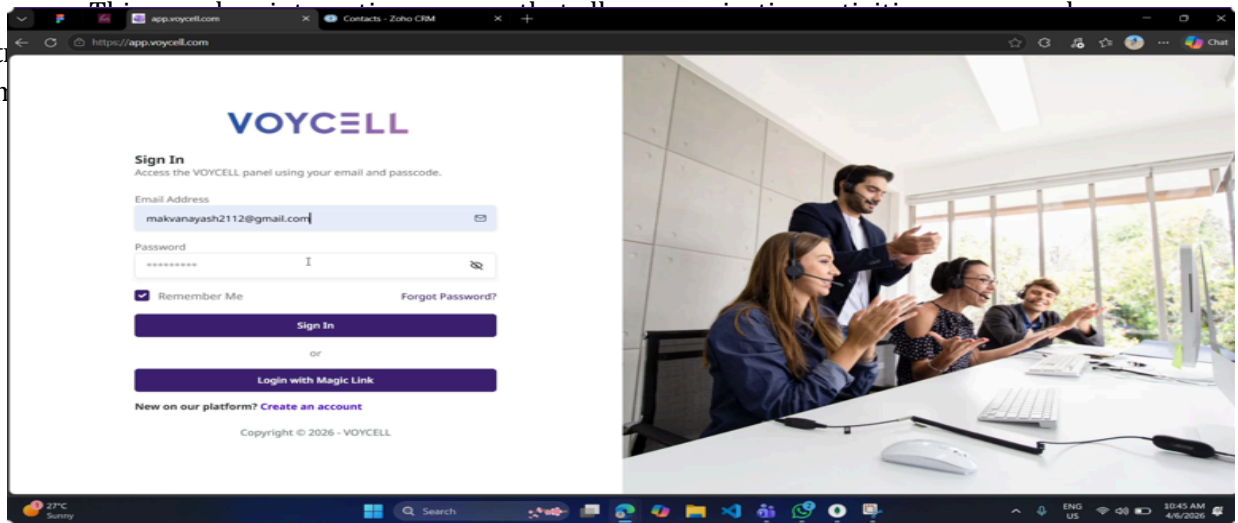
Once integration and configuration are complete, users can begin using VOYCELL's full functionality alongside Zoho CRM.

To make a call, open the dialer within the VOYCELL dashboard. Enter the phone number manually or select a contact from your available data. Click the call button to initiate the call. The system will start dialing and display the call status in real time.

During an active call, users have access to various controls such as muting the microphone, placing the call on hold, using the dial pad for inputs, and ending the call when required. These controls ensure smooth communication handling.

After the call is completed, the system will prompt you to enter call details. Add relevant notes about the conversation, select the appropriate call status such as “Connected”, “No Answer”, or “Call Back”, and include any meeting details if required. Once all details are entered, click **Save**.

All the information entered will automatically be synchronized with Zoho CRM. The call activity, notes, and any associated data will be linked to the respective contact or lead inside Zoho CRM without requiring any manual update.



https://app.voycell.com/agent/dashboard

VOYCELL

Welcome back, waqar!

Search by phone number

Dashboard

- Database
- Leads
- Calendar
- Whatsapp
- Settings
- Sync And Integration
- Call Recordings
- Import And Export
- Help & Support

Inbound Calls: 5

Outbound Calls: 53

Missed Calls

Last 30 Days Calls

Number of Calls

● Inbound Calls ● Outbound Calls

Active Call

Ready

Ext: 1010

0

0542396200

0:00

ringing

Mute Hold Dialpad

95.2%

https://app.voycell.com/crm/sync-and-integration

VOYCELL

Welcome back, Yash!

Search by phone number

Sync & Integration

- Dashboard
- Speak To Lead
- Database
- Leads
- Calendar
- Whatsapp
- Settings
- Call Recordings
- Import Contacts
- Plans & Billing
- Help & Support
- Logout

Email Integrations

- Google (makvanayashcalliforniaimedia)
- Smtip (Not Connected)

CRM Integrations

- Zoho
- HubSpot (Not Connected)
- Pipedrive

Zoho Accounts - Personal - Microsoft Edge

https://accounts.zoho.in/oauth/v2/auth?scope=ZohoCRM.modules...

Yash Makvana

Voycell

Voycell would like to access the following information.

- CRM
- california media
- Perform CRUD operations on the modules
- Retrieve user data
- Group scope to perform CRUD operations on metadata
- manage contacts data
- manage leads data
- manage tasks data
- manage events data

I allow Voycell to access the above data from my Zoho account.

27°C Sunny

10:46 AM 4/6/2020