# broadvoice + USER GUIDE

### **INTRODUCTION**

Broadvoice b-hive now integrates with Zoho to connect your telephony account and users with Zoho's phone and dialing capabilities, improving workflows and the customer experience.

### **THINGS TO KNOW**

### RINGOUT

A ringout is a call that has been routed through a service provider's device before connecting to the final number. In this case, Zoho will notify Broadvoice via the user's account to initiate the call. To make the connection, the user's device will ring — via a desk phone or Communicator's softphone — and confirm that the user wants to continue the call. Once confirmed, the call will be connected to the desired number.

### **CLICK-TO-CALL**

When an outgoing call is initiated in Zoho by clicking a phone number, the call is made via Broadvoice. Once the number is clicked, the device or softphone will ring to acknowledge the intent and bridge the phone call to the recipient.



### DIALPAD

Zoho also provides a dialpad that allows users to enter a valid phone number and initiate a call in the same way click-to-call operates via the ringout capability.

### **NOTIFICATIONS**

Zoho will display the call status and information about the caller during the call.

### **ADDING THE BROADVOICE APP IN ZOHO**

Go to Setup -> Channels -> Telephony and select Broadvoice from the Telephony MarketPlace

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Broadvoice	BT Cloud Phone	TELUS	ATAT Office@Hand
Broadvoice	BT Cloud Phone	TELUS Business Connect	Office@Hand
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Bulutsantralim	TelTel	SanIPPBX	Freevoice

From the Broadvoice app window, click the "Install" button.

Next, select which Zoho users you wish to connect to Broadvoice; you can select all users or indicate specific users.

Setup Broadvoice	
Choose the users who use Broadvoice Specific Users	
Cancel	•••

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You are done setting up the Zoho portion in preparation for linking the Broadvoice user with the Zoho user.

$\leftarrow$	Broadvoice	Uninstall
	One more step is pending. You would need to go to the Broadvoice interface to enable this integration for the below users. Click here to know how to do the same.	
	App Info Manage Users Broadvoice is installed for all the users in this organisation.	
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# **CONNECTING THE ACCOUNTS**

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After you have installed the Broadvoice app in Zoho, you need to connect your Broadvoice account to your Zoho account. Start by logging in to your Broadvoice account as an admin; once logged in, proceed to Account Settings and click the Integrations tab on the right side.

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& Account Settings	Settings	🝯 Contact Roles	🖶 Billing 🛛 Ø	Account Suspension	n 🔒 B-Labs	🔥 Integrations 🗗

From the Integrations tab, click the "Connect" button on the Zoho application card. This will open the Zoho login and authorization screens.

App Library Webhooks		
App library Review and manage your connected apps, or activate new ones.		
All apps Connected apps		
salesforce Enable users to take calls in call pop	Active Enterprise SSC Manage app logins	) Inactive + Connect
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**Note:** You must be a Zoho Administrator and confirm that you understand you are connecting your Broadvoice account to your Zoho account, which will allow information to be shared between the accounts to facilitate the integration between the two systems.



### **MANAGING USERS**

The Access Management screen allows the account admin to assign b-hive users to the corresponding Zoho users on the account.

App Library W	ebhooks					
- Back						
Zoho integrat	tion Disconne	ct				
Access mana	gement					
Add new						
Zoho user	User	Location	Phone number	SIP account	Enabled	
Zoho User	QuerOll	Northridge	1 (555) 555-1234	user08@sipemailaddri	ess.com 🕑 🛛 Edit 🔅	<

- To edit or change a user, select the "Edit" button.
- To disable a user, uncheck the "Enabled" box.
- To remove a user and remove the connection between the b-hive user and the Zoho user, click the "X."
- To add or connect a new b-hive user to a Zoho user on the account, click the "Add New" button.

In Zoho, you will see the following in the bottom left corner of your browser window.

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Phone

Add new connec	tion		
Zoho user:		Zoho User	~
User:		User08	~
Location:		Northridge	
Phone number:		1 (555) 555-1234	
SIP account:		user08@slpemailaddress.com	
Enabled:		<b>v</b>	
Save	Cancel		

The "Phone Settings" button allows you to turn on and off the pop-up display, and the dialpad (if enabled) allows you to make calls using a phone number (just like a normal call) via the ringout capability.

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### **CALLING IN ZOHO**

If the Zoho user is connected to their b-hive user account, they can click any displayed phone number and initiate a call.

Contact OwnerQuinn Rivers &Emailmelinda.a@ventura.comPhone< <al><al><al><al><al><al><al><al><al><a< th=""><th>Melinda Ar</th><th>nderson - Ventura Capitalists</th></a<></al></al></al></al></al></al></al></al></al>	Melinda Ar	nderson - Ventura Capitalists
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Mobile (Call) 4083529191	Phone	<b>Call</b> (202) 555-0124
	Mobile	(call) 4083529191
Department Purchase	Department	Purchase

# **RECEIVING CALLS IN ZOHO**

If a Zoho user is connected to their Broadvoice account and the Broadvoice phone number i associated with a Zoho user, a pop-up with the caller's information will appear when the phone rings. For example, if the phone number is found in contacts, leads, or accounts, Zoho will present the caller/account information so the user knows who is calling. When the user answers the call, Zoho will display an updated call status in the pop-up until the user ends or transfers the call.

# **CALL DISPOSITIONS IN ZOHO**

After a user ends or transfers a call, they will be presented with a call disposition screen where they can add call notes or create a contact/lead if one does not exist for the number/caller.

### **FOLLOW-UP ACTIVITY**

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At the end of every call, users can add a follow-up activity, such as a call, event, or task.

- Add a follow-up call to schedule a reminder to call the contact again.
- Add a follow-up event, such as emailing the contact.
- Add a follow-up task to remind the user to do something for the contact.

Call Disposition	
Description Call Description	
FollowUp Action	٨dd







### **CALL REMINDERS IN ZOHO**

Between monitoring deals and handling tasks, it can be hard to keep track of calls. Zoho lets users set reminders for upcoming calls and sends them notifications for missed reminders.

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	Mobile	4083529191	
	Department	Purchase	

### **CALL LOGGING IN ZOHO**

Leverage the call logging capabilities of Zoho to add notes, create follow-up tasks, or assign a contact to a different user.

All Calls 🕝				🗮 ।ण 🕂 Task	Event +	Call •••• 2
🗄 🗌 Subject	Call Type	Call Date	Start Time	Call Duration	Related To	Contact Name
Demo Feedback enquiry	Outbound	Jan 24	09:55 AM	02:04	Ventura Capita	Melinda Anderson
Call Regarding Demo Schedule	Outbound	Jan 24	01:43 PM	06:10	📳 Ventura Capita	Melinda Anderson
Confirmation call	Outbound	Jan 23	05:00 PM	04:43	Rue	Gerry Mc Shane
Order delivery date	Outbound	Jan 23	06:05 PM	06:10	Gavin Larson	Michael Wright





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## **CALL ANALYTICS IN ZOHO**

Call analytics help measure the sales team's performance and motivate them to improve, and built-in charts and reports let users visualize their call data and determine how to provide a better customer experience.

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Date	✓ Da	ys	~	Last 7	Days 🗸 🗠 Filt	ter			
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5	Free II Pression			die d	Dialled Attended	Dialled UnAttended	Call Received	Call Missed	Total Call Duration (in mins)
Email Sent	Email Receiv	ed En	mali Kej	olled	342	79	63	12	729
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etailed Repo	ort			ſ					
Date 🔻	Email Sent	Email Receiv	ved	Emai	Dialled Attended	Dialled UnAttended	Call Received	Call Missed	Total Call Duration (in mins)
01/20/2022	17				42	7	14	0	162
01/20/2022	17		7		37	12	3	1	184
01/19/2022	32		13					-	
	11		16		28	13	12	1	65
01/18/2022									

# DISABLING THE BROADVOICE INTEGRATION

To disable the integration, simply go to the Zoho integration card, manage the integration, and click the "Disconnect" button. This will de-authorize the integration between Broadvoice and Zoho and disable dialing in Zoho.

Users should also uninstall the Broadvoice app in Zoho by clicking the setup gear, going to Channels -> Telephony, and clicking the "Installed" tab.





**Note:** If you are logged in to your Zoho account, the login screen may skip to the acknowledgment screen.

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0 <sup>6</sup> Account Settings	Settings	誉 Contact Roles	🚍 Billing 🛛 🖉 Ac	ccount Suspension	n 👗 B-Labs	📥 Integrations 🕑

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salesforce	Salesforce Enable users to take calls in call pop	Active		Enterprise SSO Manage app logins	Inactive + Connect	
_zapier	Zapier User event connectivity	Inactive + Connect	ZONO	<b>Zoho</b> CRM integration: calling, logging and messaging	Inactive + Connect	

**Note:** You must be a Zoho Administrator and confirm that you understand you are connecting your Broadvoice account to your Zoho account, which will allow information to be shared between the accounts to facilitate the integration between the two systems.

