



**broadvoice** +   
Z O H O

# 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

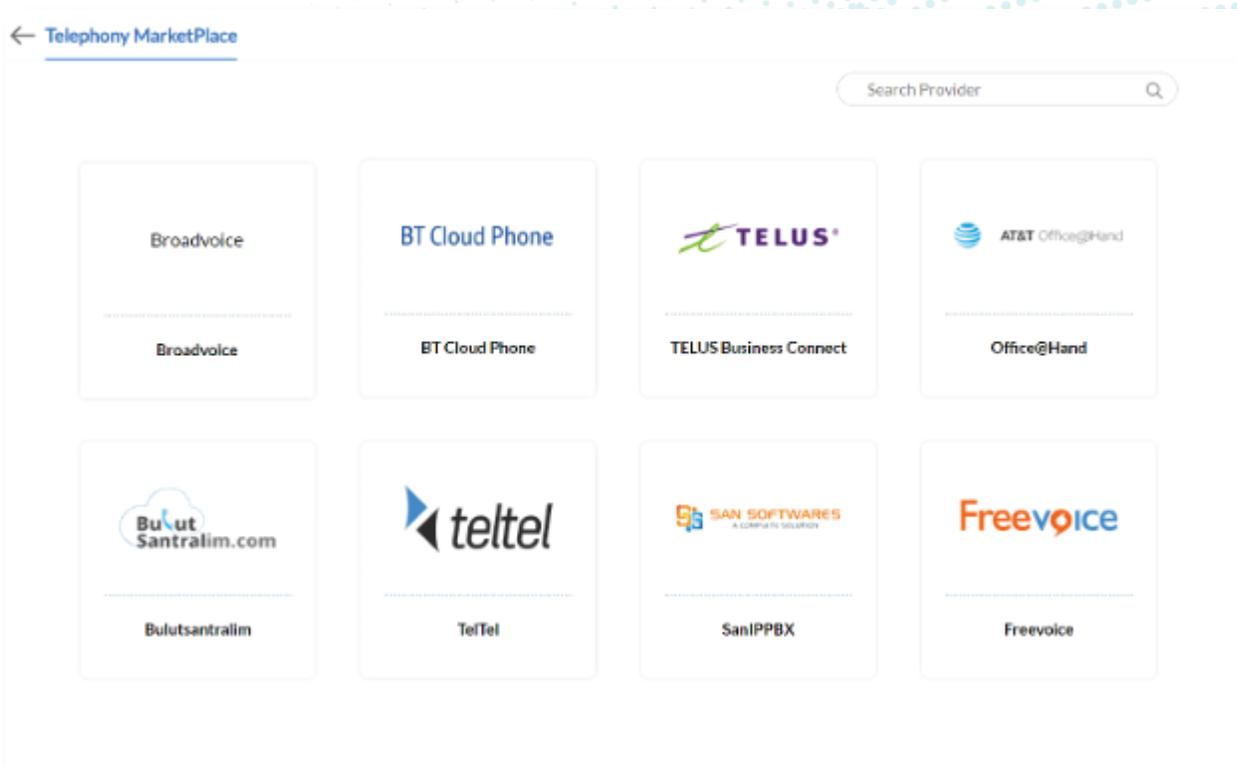
Zoho also provides a dialpad that allows users to enter a valid phone number and initiate a call in the same way click-to-call operates via the ringout capability.

## NOTIFICATIONS

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

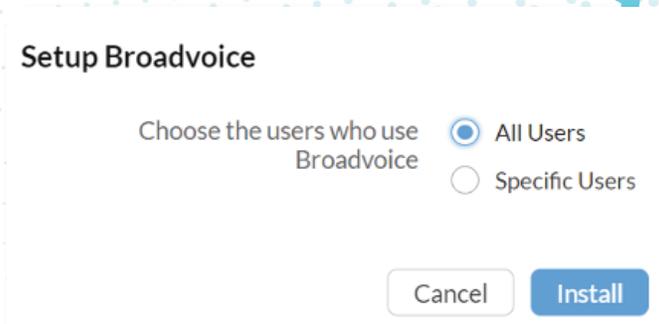
## ADDING THE BROADVOICE APP IN ZOHO

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

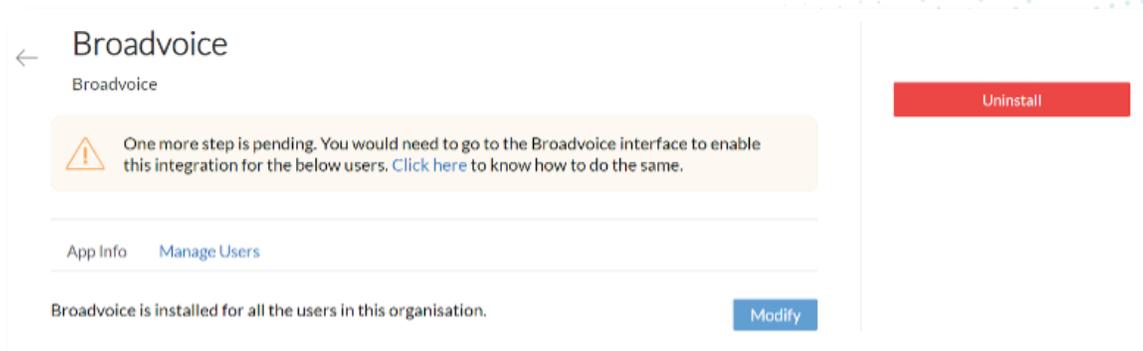


From the Broadvoice app window, click the "Install" button.

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



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

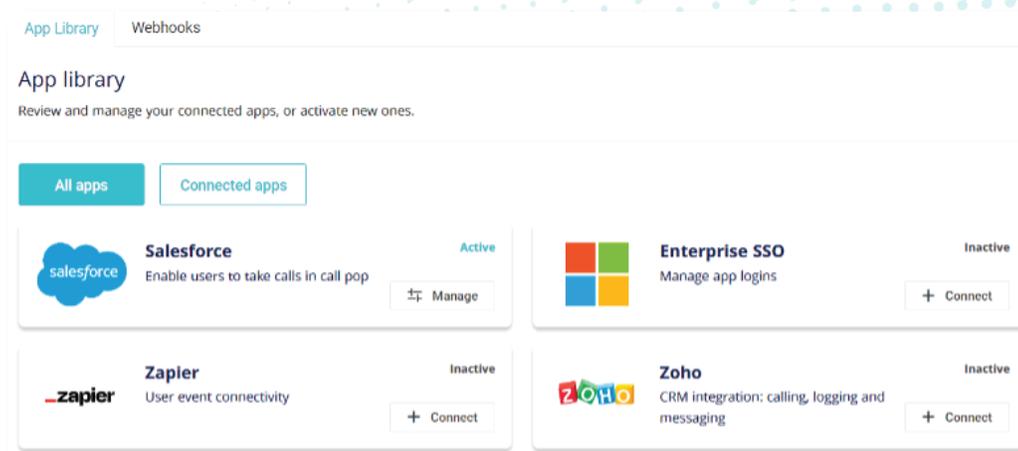


## CONNECTING THE ACCOUNTS

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.



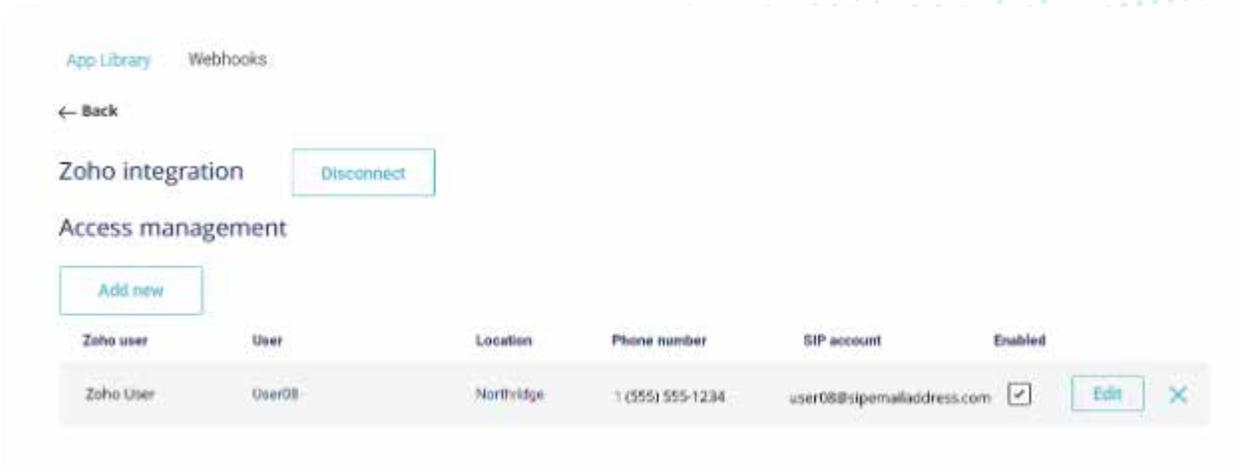
From the Integrations tab, click the “Connect” button on the Zoho application card. This will open the Zoho login and authorization screens.



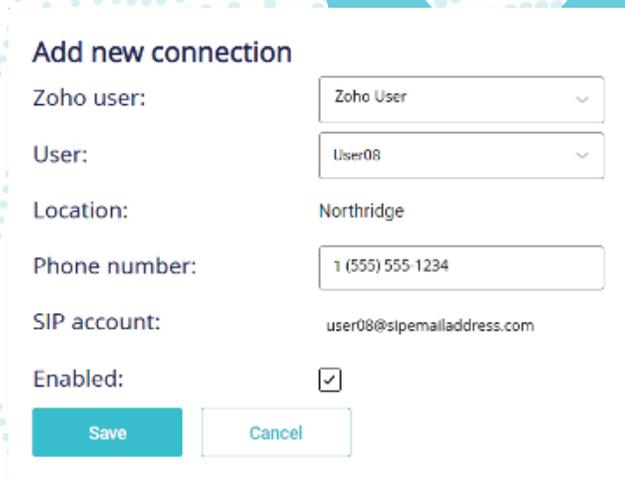
**Note:** You must be a Zoho Administrator and confirm that you understand you are connecting your Broadvoice account to your Zoho account, which will allow information to be shared between the accounts to facilitate the integration between the two systems.

# MANAGING USERS

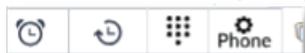
The Access Management screen allows the account admin to assign b-hive users to the corresponding Zoho users on the account.



- 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.

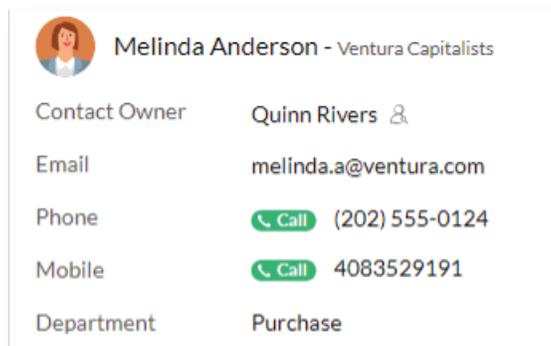


The “Phone Settings” button allows you to turn on and off the pop-up display, and the dialpad (if enabled) allows you to make calls using a phone number (just like a normal call) via the ringout capability.



## 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.



## RECEIVING CALLS IN ZOHO

If a Zoho user is connected to their Broadvoice account and the Broadvoice phone number is 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.

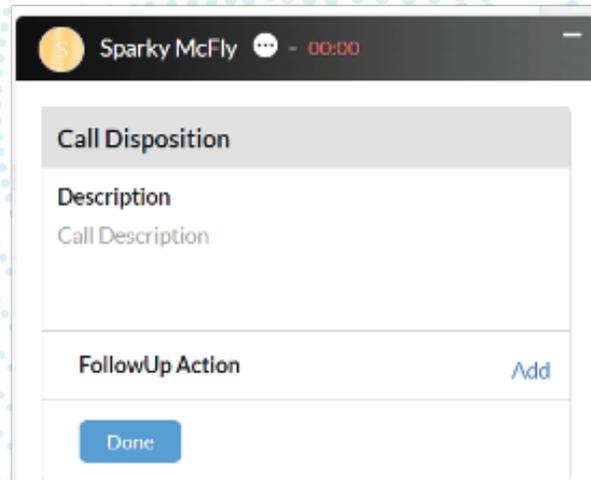
## CALL DISPOSITIONS IN ZOHO

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

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 REMINDERS IN ZOHU

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.

**It's time to call.**

**Melinda Anderson**  
Ventura Capitalists

Contact Owner: **Quinn Rivers**  
Email: **melinda.a@ventura.com**  
Phone: **(202) 555-0124**  
Mobile: **4083529191**  
Department: **Purchase**

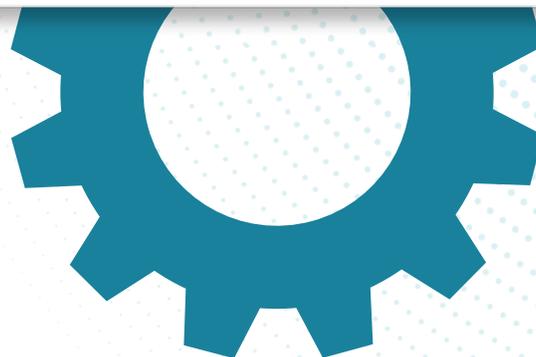
**Call** ▾ **Later** **Close** ▾

## CALL LOGGING IN ZOHU

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

**All Calls** ▾ + Task + Event + Call ⋮ ⬆ ⬇ ⬆ ⬇

<input type="checkbox"/> Subject	Call Type	Call Date	Start Time	Call Duration	Related To	Contact Name
<input type="checkbox"/> Demo Feedback enquiry	Outbound	Jan 24	09:55 AM	02:04	Ventura Capita...	Melinda Anderson
<input type="checkbox"/> Call Regarding Demo Schedule	Outbound	Jan 24	01:43 PM	06:10	Ventura Capita...	Melinda Anderson
<input type="checkbox"/> Confirmation call	Outbound	Jan 23	05:00 PM	04:43	Rue	Gerry Mc Shane
<input type="checkbox"/> Order delivery date	Outbound	Jan 23	06:05 PM	06:10	Gavin Larson	Michael Wright



# 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.

← Email and Call Analytics Report Export to PDF Duplicate

Summarized By: Date | Group By: Days | Date Range: Last 7 Days | Filter

All Entities | All Emails | All Users

**Summary Report**

Email Sent	Email Received	Email Replied	Dialled Attended	Dialled UnAttended	Call Received	Call Missed	Total Call Duration (in mins)
92	41	74	342	79	63	12	729

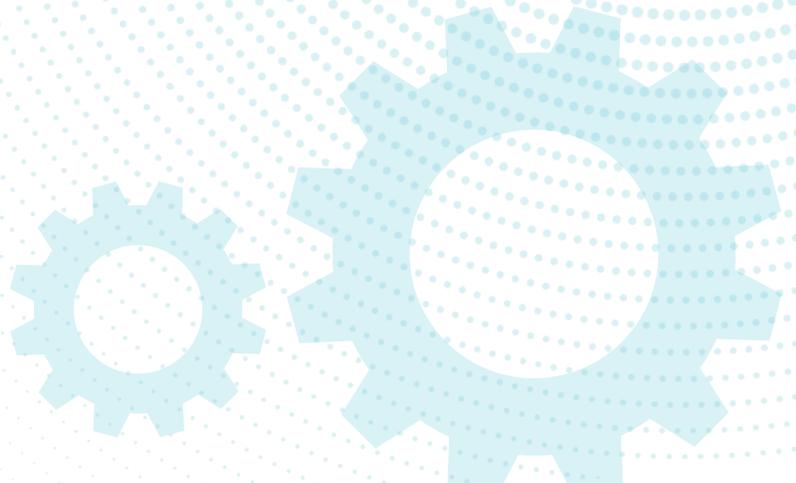
**Detailed Report**

Date	Email Sent	Email Received	Email Replied	Dialled Attended	Dialled UnAttended	Call Received	Call Missed	Total Call Duration (in mins)
01/20/2022	17	9	11	42	7	14	0	162
01/19/2022	32	13	16	37	12	3	1	184
01/18/2022	11	16	11	28	13	12	1	65
Sum	60	38	38	107	32	29	2	411

# 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.

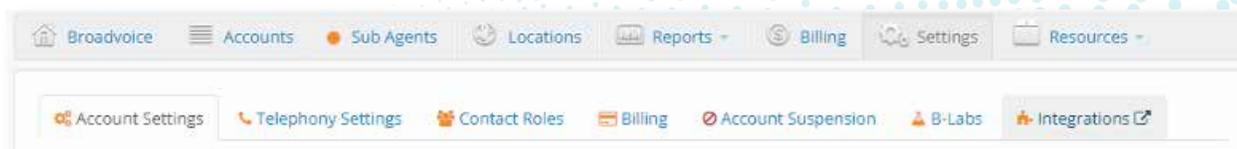
Users should also uninstall the Broadvoice app in Zoho by clicking the setup gear, going to Channels -> Telephony, and clicking the “Installed” tab.



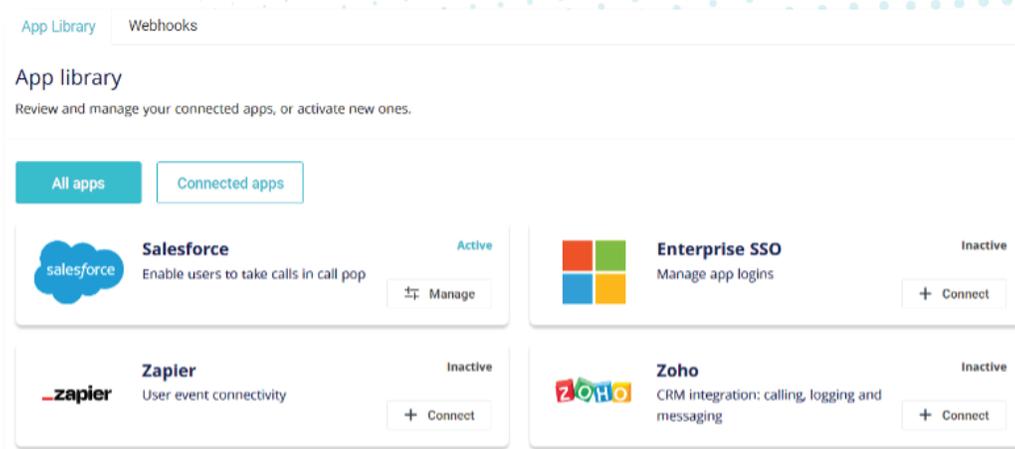
**Note:** If you are logged in to your Zoho account, the login screen may skip to the acknowledgment screen.

## CONNECTING THE ACCOUNTS

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.



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



**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.