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TABLE OF CONTENTS

S.No.	Topic	Page
1.	Preface	3
1.1	Purpose of this document	3
1.2	Use of this document	3
1.3	Overview	3
1.4	Basis of this Document	3
2.	Smart Dial Extension Enable Process For Zoho CRM	4-8





1. Preface

1.1 Purpose of this document

#1.1.a This document is a generic Technical Design Document for use by "Essence Technology Automation India Pvt. Ltd.". It provides guidance and template material which is intended to assist the relevant management or production staff or support staff, in producing a project specific Technical Design Document. It is also useful background reading for anyone involved in developing or monitoring the existing Smart Dial extension enable process for Zoho CRM.

1.2 Use of this document

#1.2.a This Preface is addressed to the users of this generic document and is not meant to be retained in any project specific Technical Design Document based on it.

#1.2.b This document may be modified or overwritten directly at each occurrence and it depends of the discretion of the user.

1.3 Overview

#1.3.a This preface is for information only (in very specific term the purpose & the use).

1.4 Basis of this Document

#1.4.a It attempts to set standards and create a consistent approach to the design and development of systems across the Program. It will enable the Program to benefit from 'economies of scale' and a consistency in the approach to building and deploying systems. Important issues that need to be considered include the architecture of systems, links to legacy systems, contemporary approaches to design (Object Oriented Program), aims for code re-use and the need to develop systems that will work on an operational basis over many years and the associated desire to make such systems easily supportable and affordable.

#1.4.b A key point will be to build on the work already carried out in smart and its predecessor programs, where a large number of specific 'technical' developments were undertaken looking at, for example, standards for data exchange, such as APIs, and the introduction of contemporary technologies and infrastructures.



2. Smart Dial Extension enable process for Zoho CRM

Find the steps to be taken for the integration with the ZOHO for enabling SMART DIAL extension in ZOHO CRM.

Step1: Visit https://www.etaipl.in

Step2: Then click on "Integrate With Zoho" as shown in below page



Step3: Once the integration page is opened, then it shows as follows:

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← → C O A https://w © T Home Services Integrate w	etaiplin/zoho-integration.html 💮 🧟 Search 💿 🗏	
	Your SMART Client ID	
	Your SMART Campaign	
Step4: Fill out the client	d, agent id and campaign available in or shared by the Smart Team.	
Integrate wi	h ZOHO номе / интеглате илти зоно	
	2001 C	
	trolning Save	
Step5: Then click on Sa	e button to submit the information	
Step6: The website will	e redirected to the Zoho panel, login with email or mobile and password.	



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	Sign in using	Lauromees	
Step7: After lo	gged In, it asks for Accept/Reject		
e → C	3 8 https://accounts.zoho.in/courts/v2/with?accpe=?hcreeBidge.zwiLlog%2CPhoneBidge.zohoun	essant 🗉 🏠 🔍 Search	
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Step8: Then click on "Accept" button for PhoneBridge authorization of the SMART dial extension.

Step9: Check the message available on the screen after accepting the authorization, which looks like as follows:

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Integration With ZOHO has been completed for the agent.

Step10: If it is successful, then smart dial extension is enabled in the Zoho CRM.

Step11: Now, login to the SMART Administrator Panel.

Step12: Goto System Configuration > Zoho User Listing Menu.

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•	BLACKLIST			/	2	/		/	1
67	EXTENSION DETAIL			The second second		1			
	USER			Select the usend		1	11	/	
	DISPOSITION				9			E.	
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	CHAT BROUPS				Tan		/	P	
2	LEAD SOURCE				Sele	ect the Extension		1	
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	DEFAULT AUTO LOGIN			TICK OT CIECKDON (C ET	aven	e orek to call real	1 6 (0 20110 G981	P.	
	Αρτινίτν					Tick on checkt	ox to enable the "In	coming Call" to	zoho user
	DATASET								
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Step	13: Select the user	idi	in the SMART Userid Co	olumn, campaign in	Def	fault Campa	ign Colum	n and SIP	Number in
the E	Extension Column.								



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Q ;	BLACKLIST								
Step	14: Mark the clic	s to	o call column checkbox tr	rue, if click to call h	as to	be enabl	ed for the	at Zoho us	ser. Mark
nco	ming column che	ckb	box true, if incoming has	to be enabled for th	at Zo	oho user.			
(Not	e: incoming will b	e c	lefault true, if click to cal	l has been checked	true	, it can be	e manipu	lated afte	rwards.)
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Step	16: Now it is goo	d to	o go for the calling from 2	ZOHO CRM using	SMA	ART DIA	L Extens	ion.	
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