



Epygi QX IP PBX Integration with Zoho CRM

Abstract: **Epygi** IP PBX products are integrated with **Zoho CRM** via **Zoho PhoneBridge REST API**. This document describes how to configure and use Epygi IP PBX with Zoho CRM.

Document Revision History

Revision	Date	Revision	Valid for Models	Valid for FW
1.0	23-Nov-22	Initial Release	Epygi IP PBXs of QX and UC line	6.4.15 and higher

Contents

1. Introduction.....	3
2. Enable Epygi Extension in Zoho CRM	3
3. Configure QX to work with Zoho CRM	5
4. The Click to Dial feature	8
5. Screen pop-ups for calls.....	9
6. References	11

1. Introduction

Epygi provides integration between its IP PBX and Zoho CRM via Zoho PhoneBridge REST API. This integration allows to use Epygi IP PBX features from Zoho CRM. Specifically, to make calls from Zoho CRM, to watch the calling contact's details in Zoho CRM window, etc.

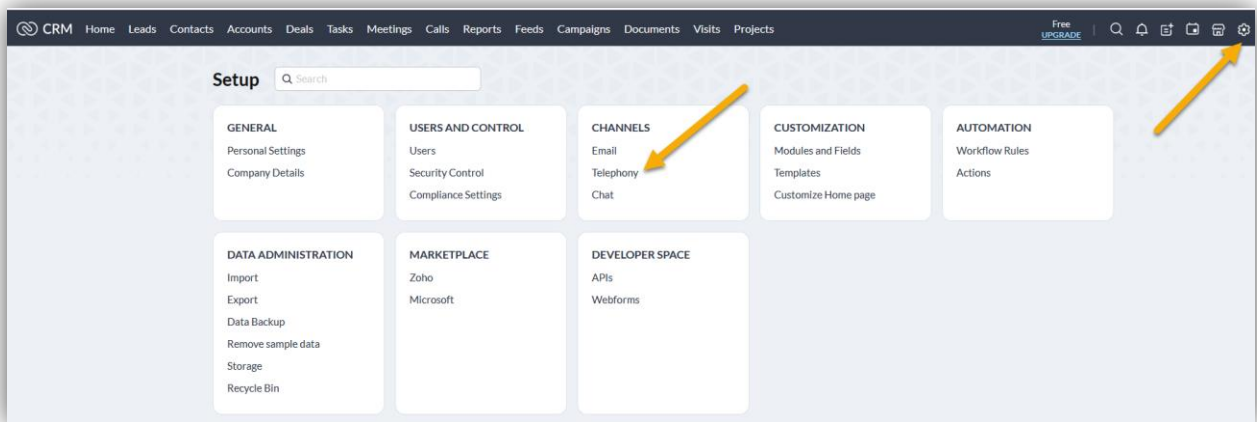
The CRM integration is a licensable feature for Epygi IP PBX, therefore a license key should be purchased and installed to make the integration functional on a simultaneously connected user basis. Only after license activation on the Epygi IP PBX, the **CRM Connect Management** menu option will be accessible for admin under the **Extensions** → **CRM Connect menu** on the GUI.

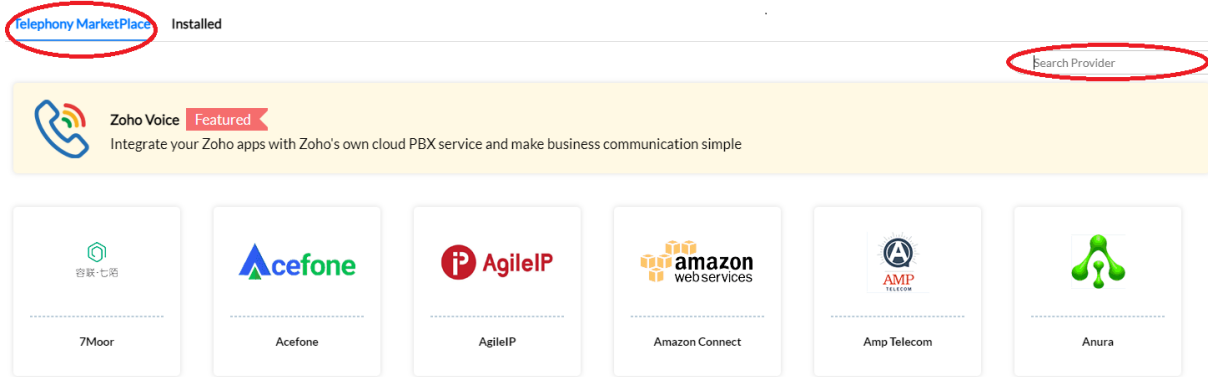
Below we describe how to configure Epygi IP PBX with Zoho CRM for enabling integration, and how to make use of that integration.

Please Note: The described configuration is generic for all Epygi IP PBX products of QX and UC line (henceforth QX), namely for QX20, QX50, QX60, QX100, QX200, QX500, QX3000, QX5000, QXISDN4+, ecQX and UC20, UC80. The security issues are beyond the scope of this document. See the listed documents in References section to get more information on the security related issues for QX.

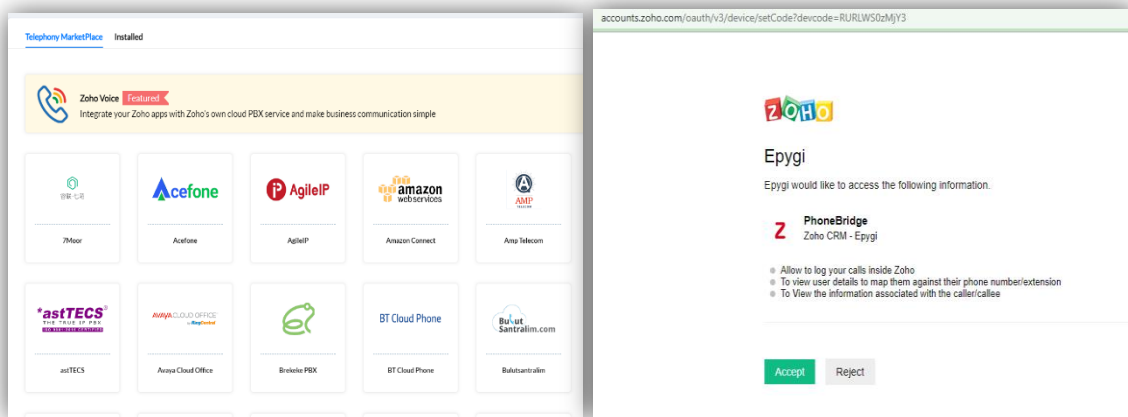
2. Enable Epygi Extension in Zoho CRM

- Log-in to <https://crm.zoho.com/> with manager account
- Go to “Setup- > Channels- > Telephony” menu
- Open the “Telephony -> Marketplace” tab

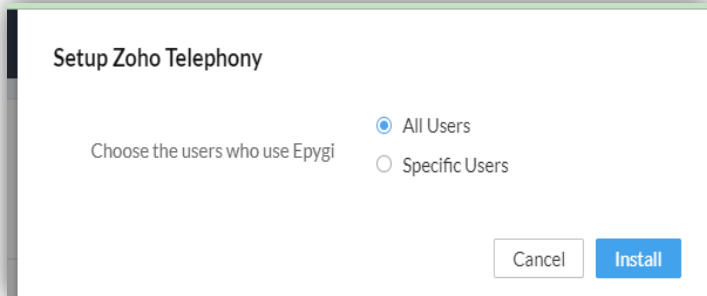




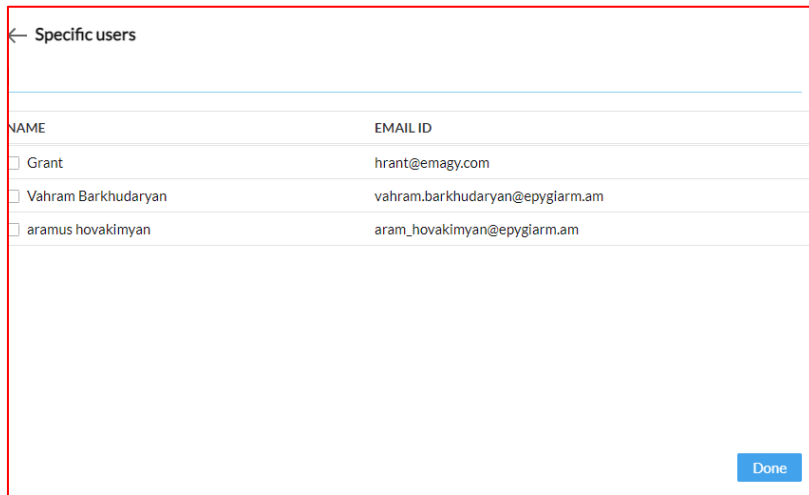
- In the **Search Provider** field type “Epygi”
- Push “Epygi” then “Install” for **All Users**
- Accept the terms and click the install button



Note. If the Epygi application will be used by specific Zoho users (if in call centers, they mostly are called “Agents”), then it is necessary to select the “Specific Users” option from the Zoho Settings -> Telephony -> Marketplace menu, otherwise, click All Users



The second option will open the list of users to choose from



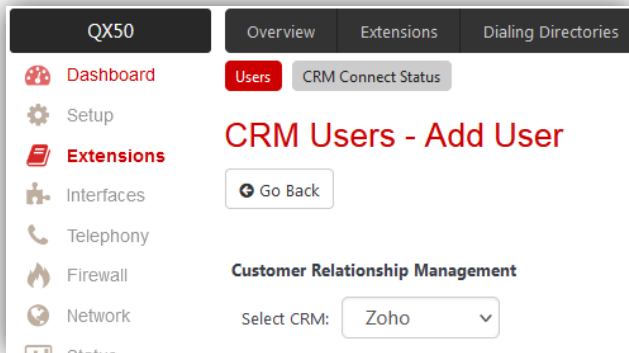
NAME	EMAIL ID
<input type="checkbox"/> Grant	hrant@emagy.com
<input type="checkbox"/> Vahram Barkhudaryan	vahram.barkhudaryan@epygiarm.am
<input type="checkbox"/> aramus hovakimyan	aram_hovakimyan@epygiarm.am

Result: Users will see the Epygi app installed in the Settings->Telephony menu as shown in the snapshot below. Users who have the Epygi extension installed from the Zoho Marketplace platform will be able to use the corresponding sections of the Zoho CRM system to make or receive calls.

Note. From user's Basic Permission section, an Administrator must enable settings like Leads, Contacts, Calls and Reports in order to allow users to work with Epygi features.

3. Configure QX to work with Zoho CRM

- Login into QX as admin and go to **Extensions -> CRM Connect-> Users-> Add User**
- In Select CRM menu choose: Zoho

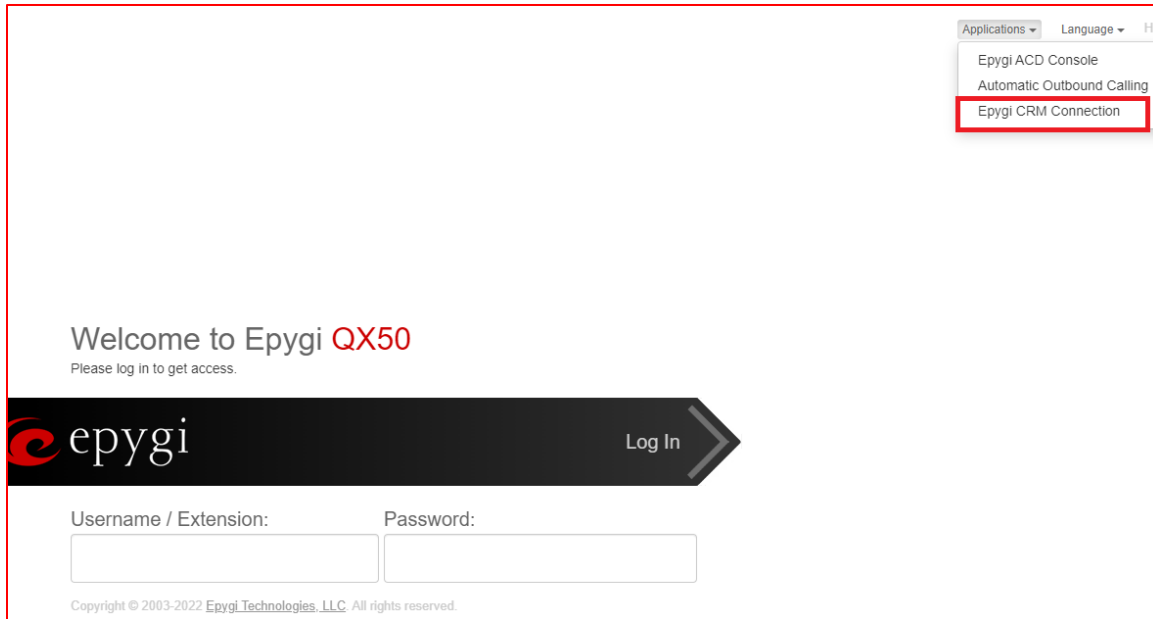


- In the Username field enter the CRM username on QX (should be unique)
- In the Web Authentication section: add credentials that should be used to login and access the CRM account from the Epygi web client via QX GUI Applications->Epygi CRM Connection. Both numbers and letters can be used for the login, such as the agent's first and last name or nickname.

- Monitored Extensions: the QX extensions (users) that will be connected to the Zoho CRM user
- Connection Settings -> Account URL: the account URL of Zoho CRM. Example: <https://accounts.zoho.com>. This setting is the same for all Zoho CRM users in QX.
- Connection Settings -> Click to dial URI: this URI will be called by Zoho CRM when user initiates ClickToDial function from Zoho CRM. Example: <https://myQX.epygicloud.com/crmclicktodial>.

The screenshot shows the 'ecQX' web interface with the 'CRM Connect' tab selected. The 'Users' section is active, displaying configuration options for a user named 'Grant'. The 'Web Authentication' section includes fields for Username ('hrant'), Password, and Confirm Password. The 'Monitored extensions' section has a field for 'Extensions' set to '202'. The 'Connection Settings' section includes a dropdown for 'Account URL' set to 'https://accounts.zoho.com.au' and a text field for 'Click to dial URI' set to 'https://zoho.epygicloud.com/crmclicktodial'. A 'Save' button is located at the bottom of the configuration area.

Result: The basic configuration is completed in QX. To start working with Zoho CRM, user should at first login to QX via “QX GUI Applications->Epygi CRM Connection” using “Web Authentication” credentials configured in Extensions->CRM Connect->Users.

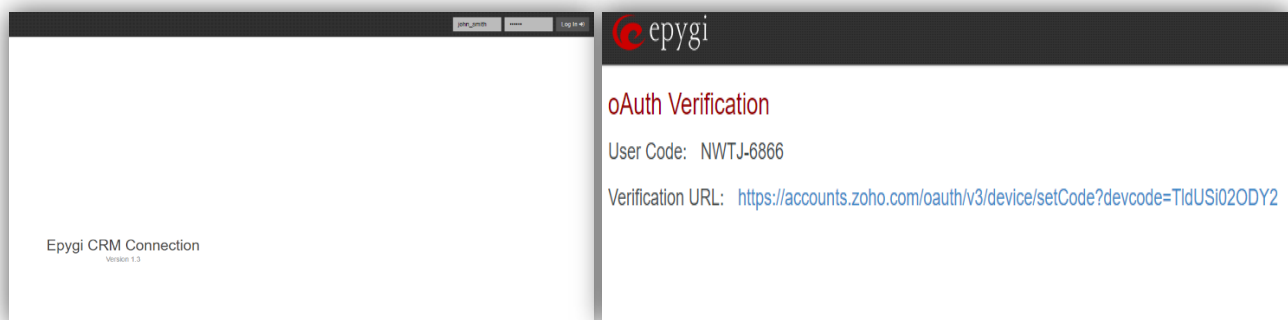


After successful login, the Verification URL will be displayed to the user. User should follow the verification link, login into accounts.zoho.com portal using Zoho credentials, and press the “Accept” button to start working with Zoho CRM.

Note. This step is necessary to connect the device to the Zoho CRM system, and when at least one of the agents clicks that link, there is no need to click the same link again, because after using the link once, the device is already connected to the Zoho CRM.

If Zoho CRM is connected to Epygi QX, a Zoho agent can make or receive calls from its dashboard, by selecting contact or lead or schedule a call for the future. Additionally, once the calls are already made and visible in the history, it is possible to create leads and contacts from history.

Note. The CRM interface is only needed to authenticate and connect the given agent to the QX device. Once authenticated, the QX will then be connected to Zoho and there is no additional need for each agent to click that link again.



Once a user is logged into cm.zoho.com, he/she can use the following features:

- **Click to Dial:** Call to customers and leads directly from Zoho account with a single click using the Click to Dial feature.

- **Screen pop-ups for calls:** Receive screen pop-ups for incoming and outgoing calls to see instantly who is calling or being called. The pop-ups that appear in Zoho provide detailed information and contextual access to the historical interactions with the contact.
- **Automatic call logs:** All incoming and outgoing call activities are logged automatically inside the Zoho platform.

4. The Click to Dial feature

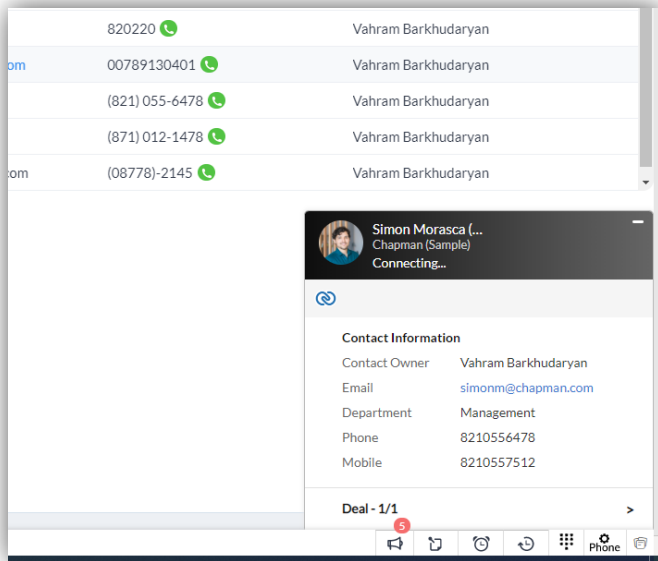
The Click to Dial (C2D) feature allows to activate a call, connecting two parties together via auto-generated call. The integration in the Zoho system is already done when we connect the Zoho CRM system to the QX device. If you see green phone button next to the phone number, it means that C2D is activated and ready for use.

In the corresponding pop-up window, we can see to whom the call is being sent. Important details are Contact Information, Contact Owner, Department or Email address. The avatar photo and other details are filled right from the Zoho window in the given customer's profile. These are needed so that more information is visible in the CRM system and agents can add information to customer profiles as needed.

Clicking on the phone icon on the Contacts' window to make a call to the contact

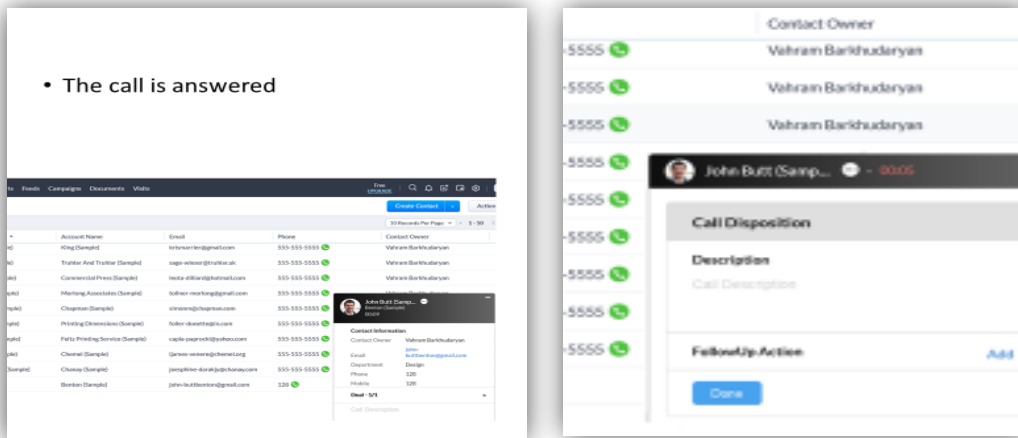
Contact Name	Account Name	Email	Phone	Contact Owner
Aram Hovakimyan		jaaaram@gmail.com	77429149	aramus hovakim
Agent 128 Agent 128			128	Vahram Barkhudaryan
Agent 103 Agent 103			103	John Smith
John Buttenton		john-buttenton@gmail.com	+37491000000	John Smith
Panos Marrier (Sample)	King (Sample)	krismarrier@gmail.com	30360033	Hrant Vardanyan
Sage Wieser (Sample)	Truhlar And Truhlar (Sample)	sage-wieser@truhlar.uk	820220	Vahram Barkhudaryan
Leota Dillard (Sample)	Commercial Press (Sample)	leota-dillard@hotmail.com	00789130401	Vahram Barkhudaryan
Simon Morasca (Sample)	Chapman (Sample)	simonm@chapman.com	(821) 055-6478	Vahram Barkhudaryan
Donette Foller (Sample)	Printing Dimensions (Sample)	foller-donette@in.com	(871) 012-1478	Vahram Barkhudaryan
Capla Paprocki (Sample)	Feltz Printing Service (Sample)	capla-paprocki@yahoo.com	(08778)-2145	Vahram Barkhudaryan

In case if the call is answered, the call-related details may be filled in by user in the popup windows.



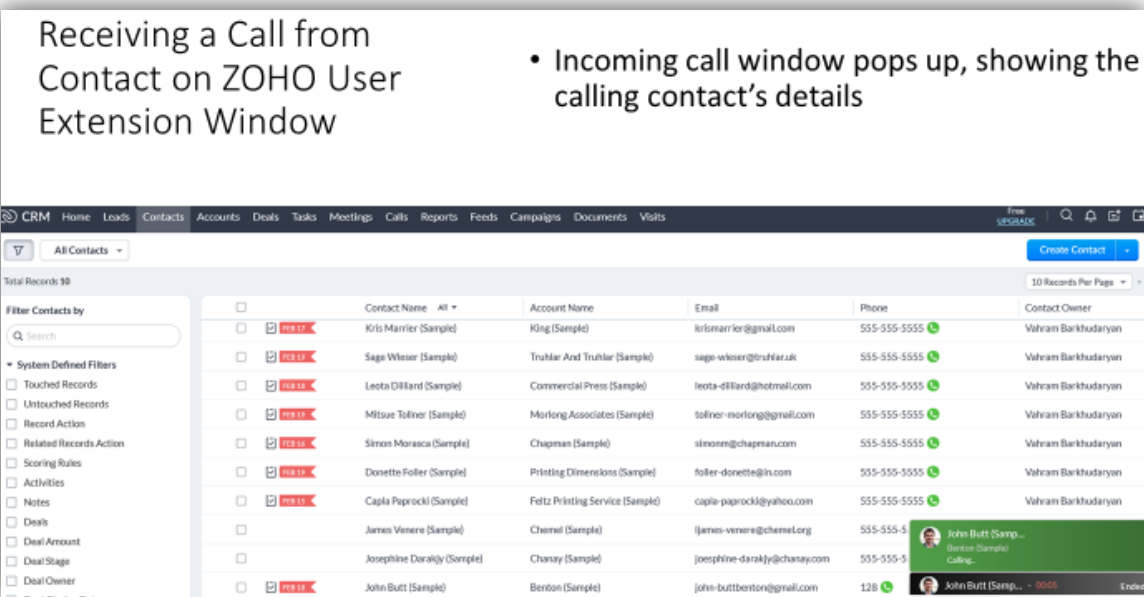
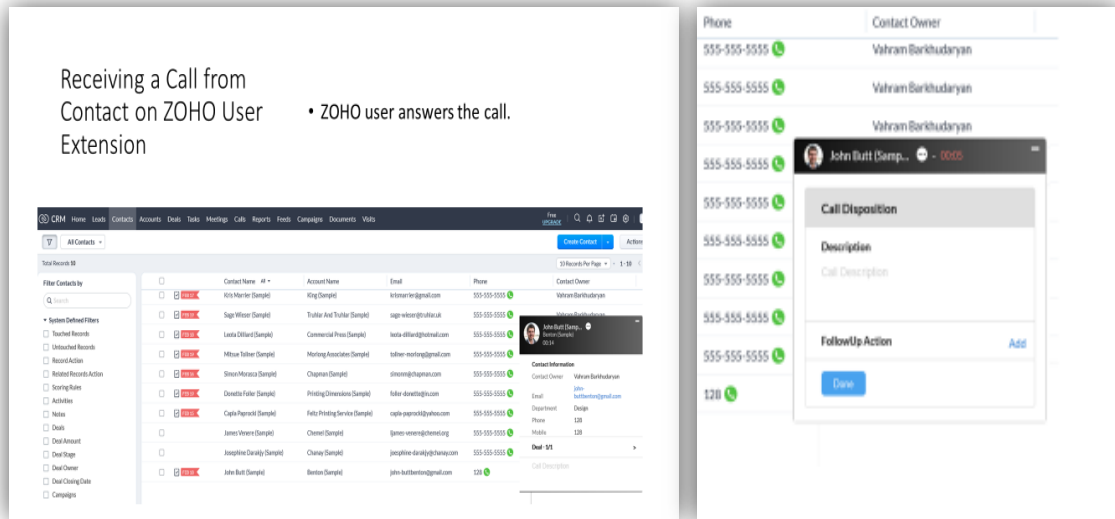
5. Screen pop-ups for calls

During a call, Zoho agents mostly work with pop-up windows.



They can be used to receive or send a call. It is often necessary to fill in data in the opened pop-up window, such as the purpose or topic of the call, status, etc.

As soon as the Zoho agent sees the incoming call in the small window and picks it up, the window expands, and they can leave notes if required.



6. References

Refer to the below-listed resources to get more details about the configuration settings used in this guide at the Epygi Support Portal:

- Manual-II: Administration Guide for QX IP PBXs
- Manual-III: User Guide for QX IP PBXs
- Call Routing on QX IP PBXs
- Preventing Unauthorized Calls on QX IP PBXs
- Users Rights Management on QX IP PBXs

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