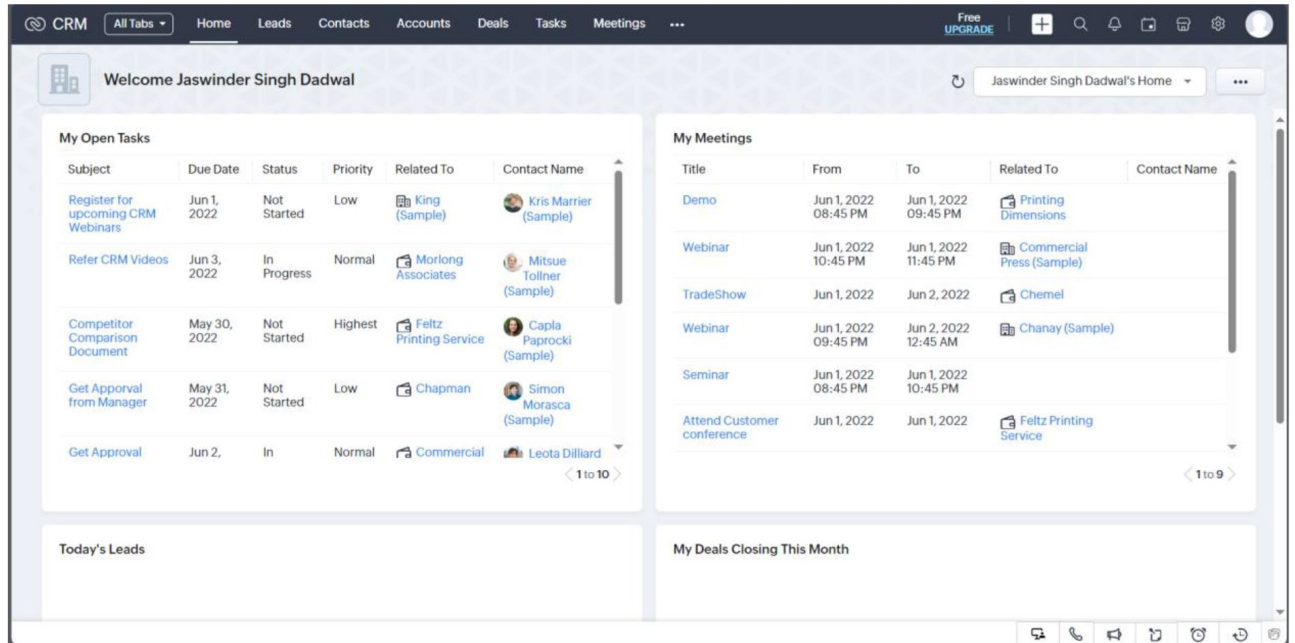
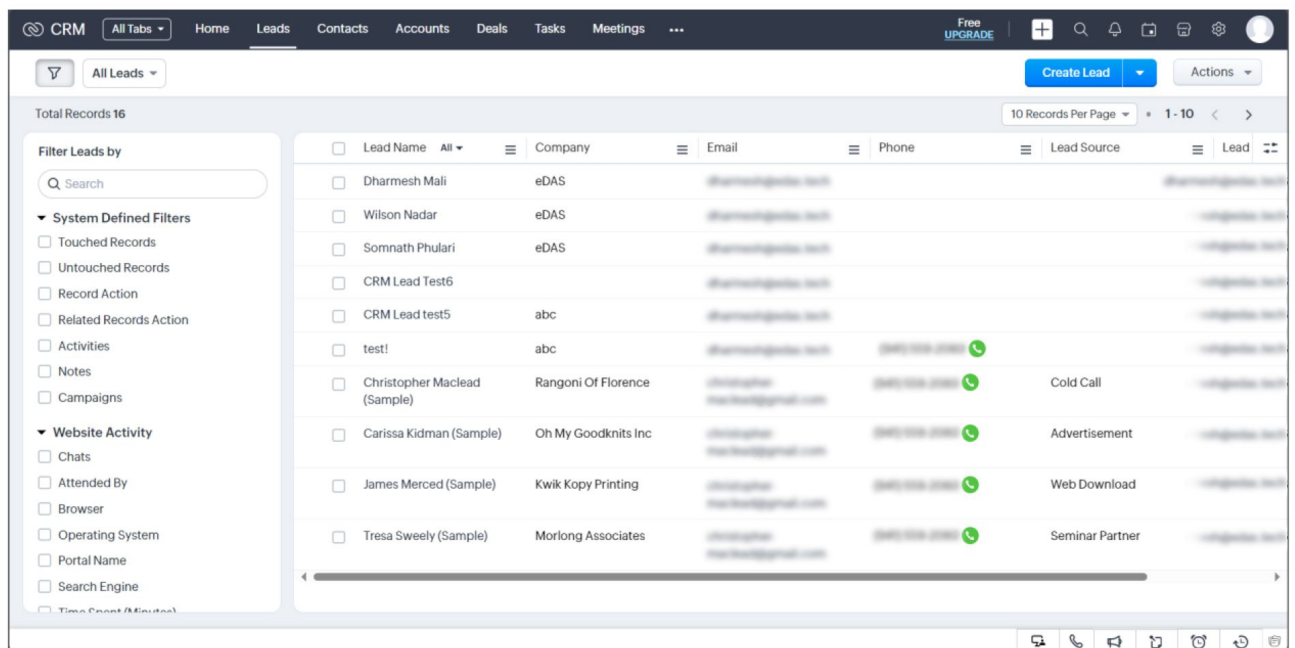


VAANI Telephony Extension for ZOHO CRM

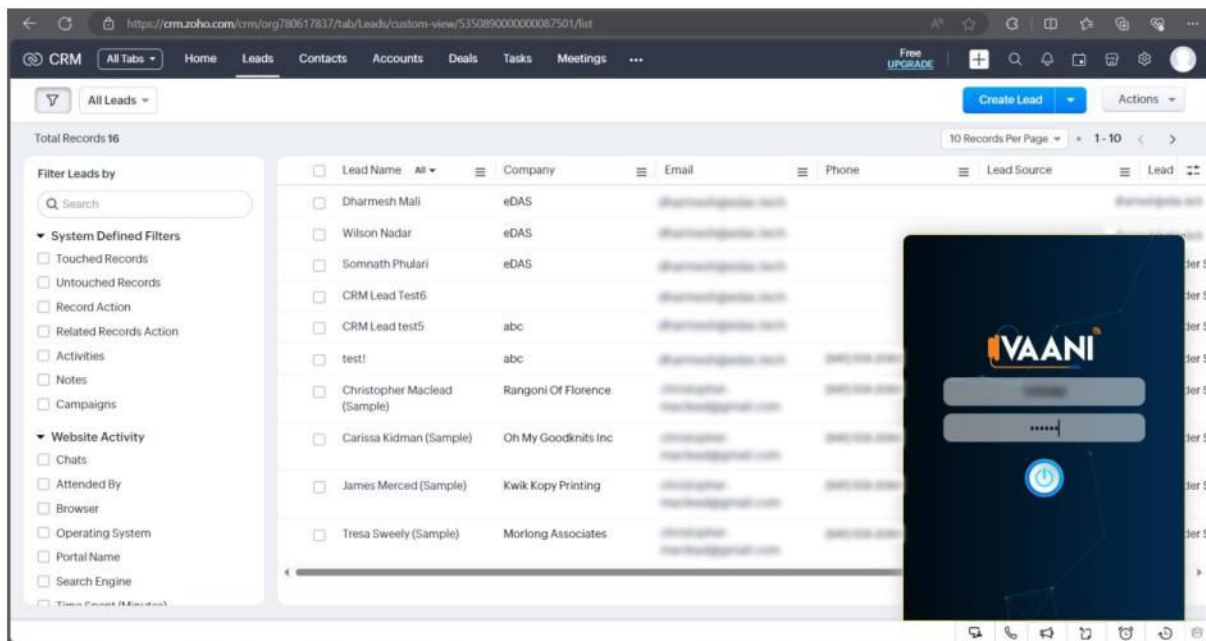
- Login in your ZOHO CRM page.



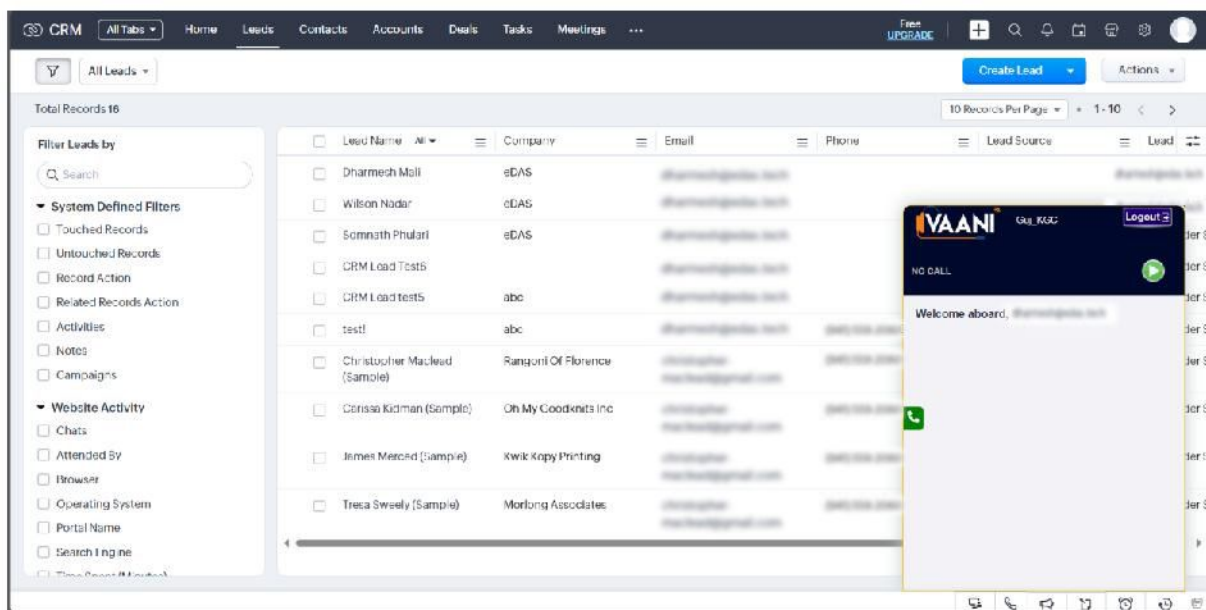
- Click on the “Lead” tab to view the leads table.



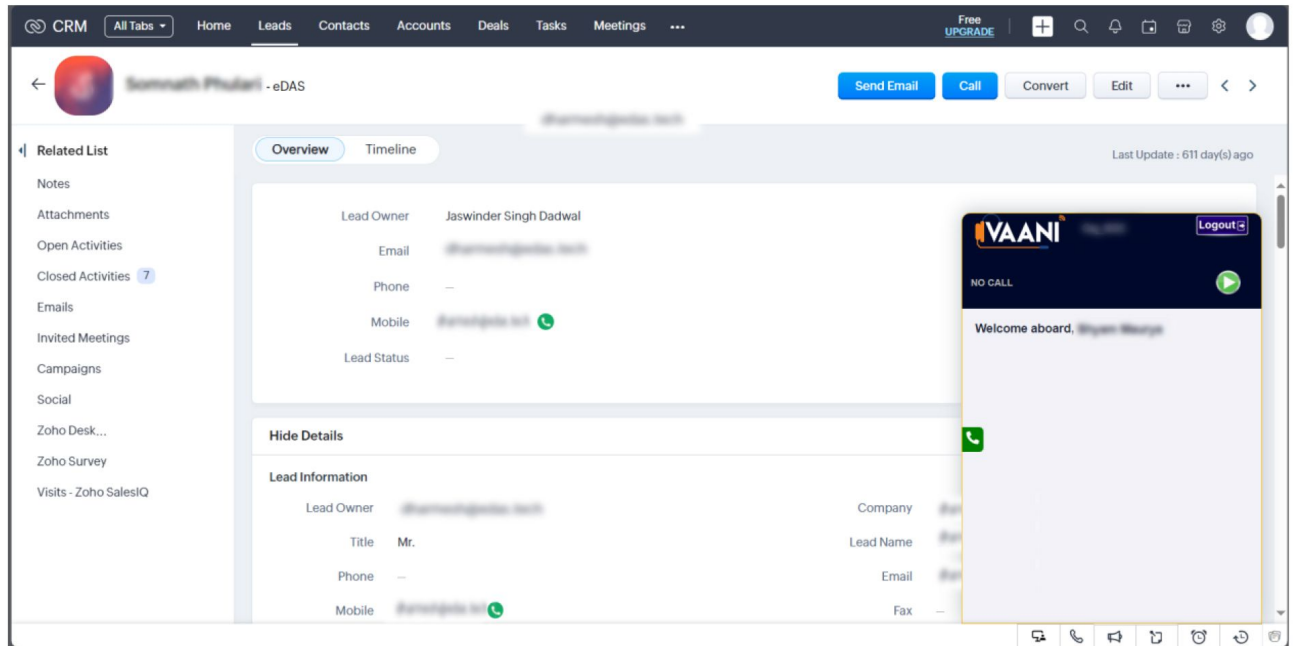
- The widget logo can be found on the bottom right side of your screen with a phone logo. Once clicked the dialler pop up appear on the screen showing a login page.



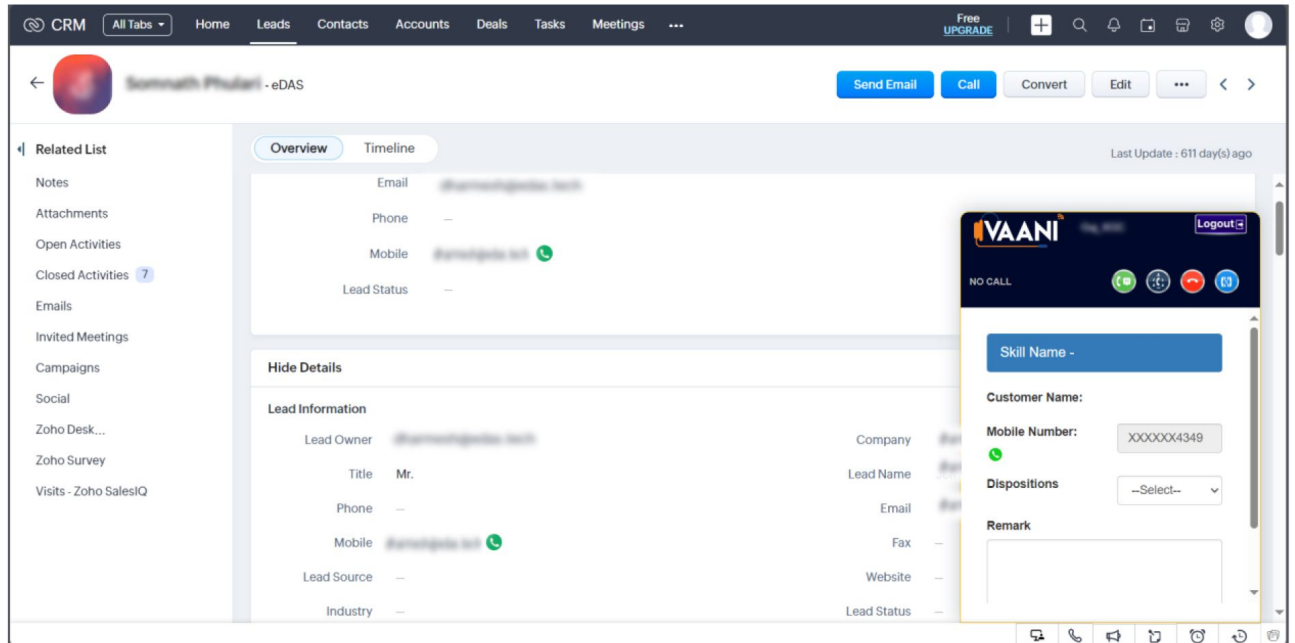
- After entering the credentials select a lead from the leads tab to dial.



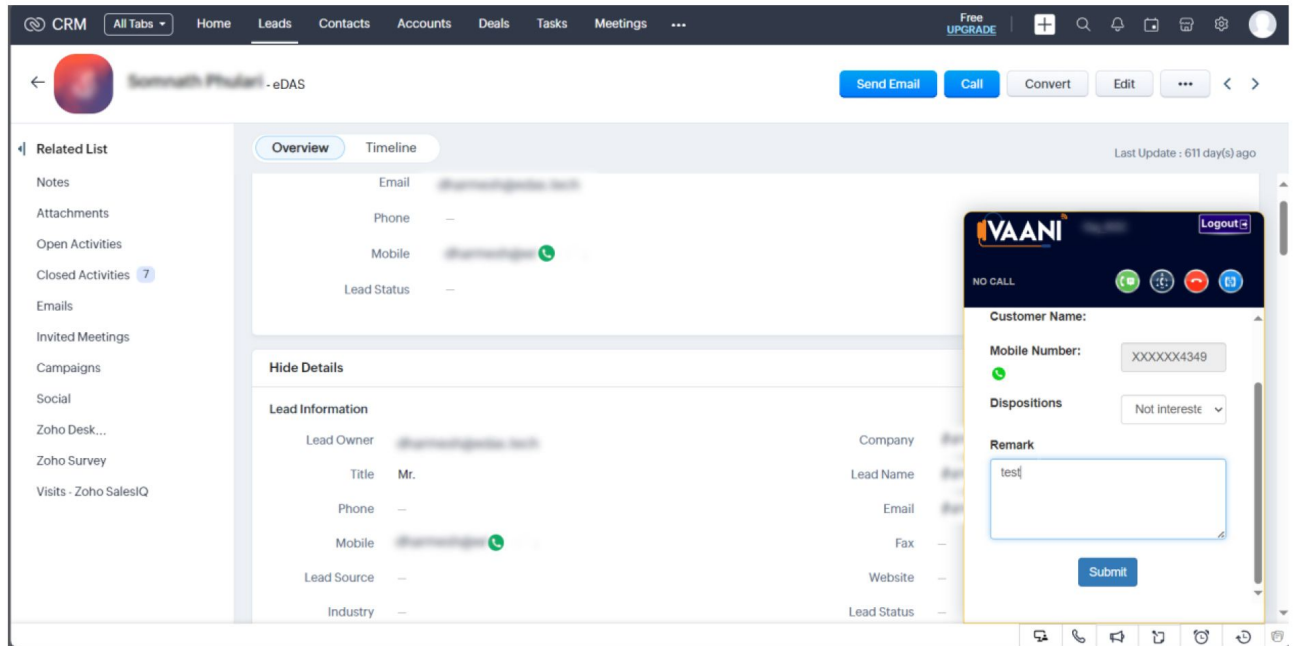
- On selecting a lead click on its name to open the lead details tab.
- Select the phone number and click on the green button near the number to dial the number.



- The number on dialling will be reflected in the VAANI panel (widget).



- The widget on dialling will have the customer details with – **Masked phone number**, **Dispositions** and **Remark** for manual text.

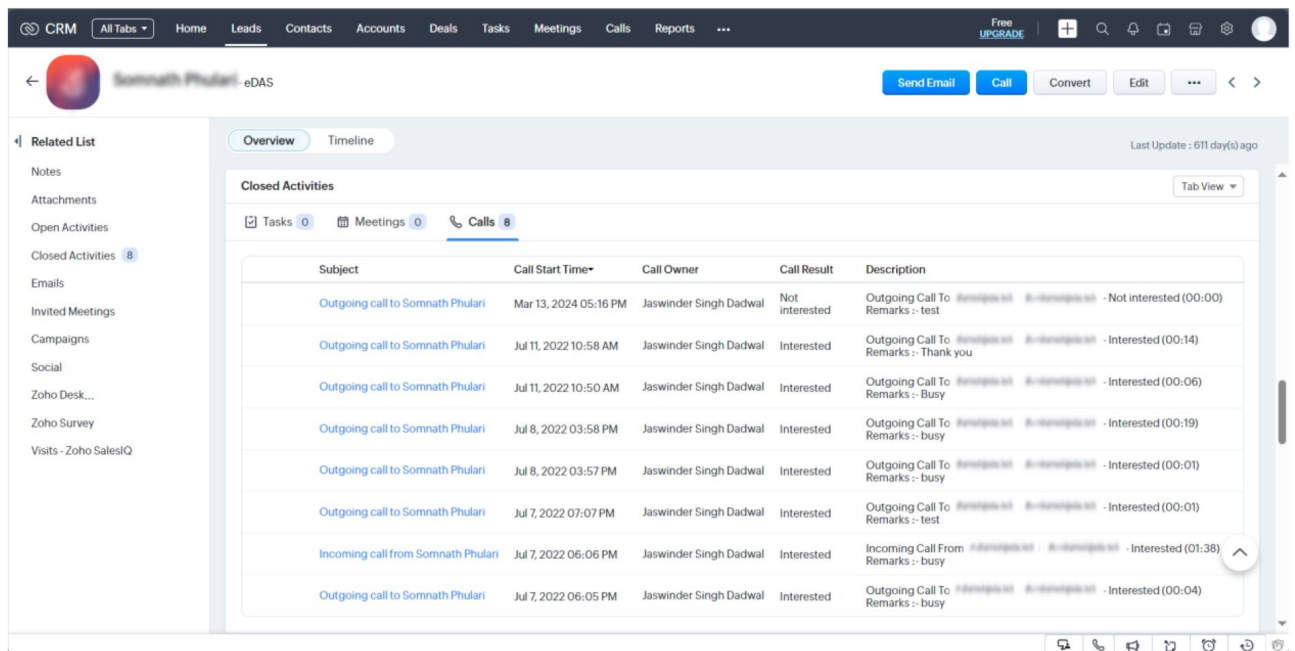


The screenshot shows a CRM lead profile for 'Somnath Phulari'. A VAANI dialler widget is open, showing the following details:

- Customer Name: [Redacted]
- Mobile Number: XXXXXX4349
- Dispositions: Not Interest
- Remark: test

The widget also includes a 'Submit' button and a 'Logout' link.

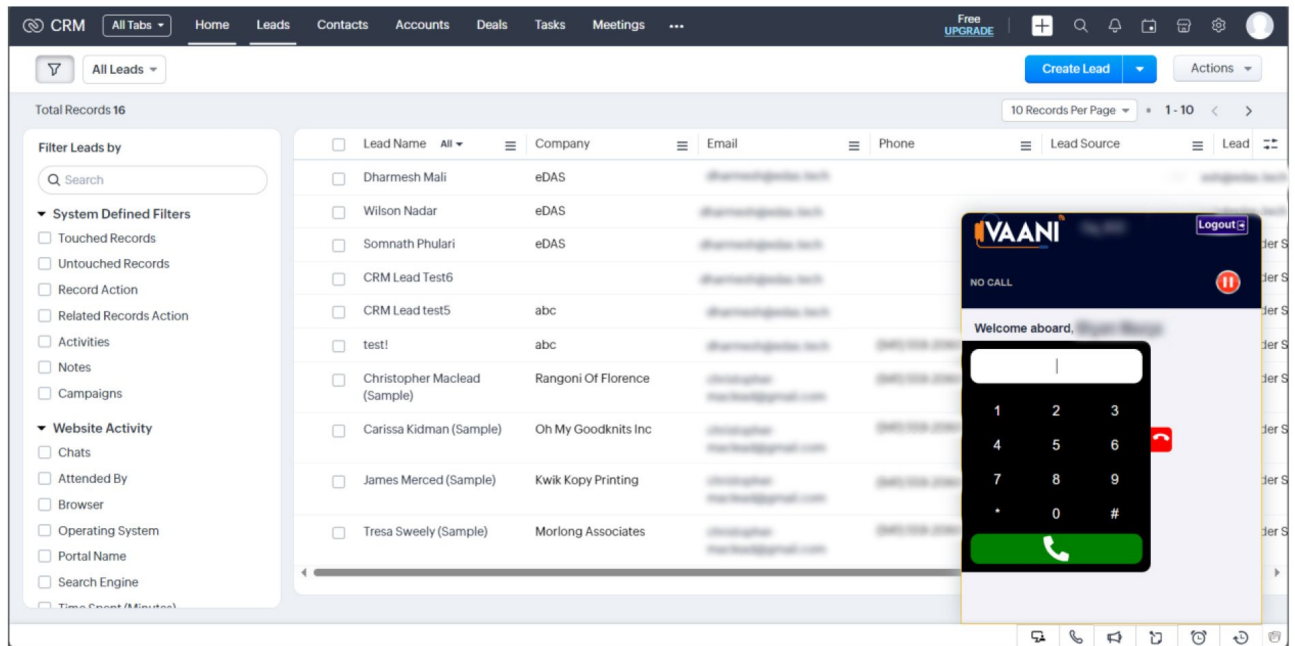
- On submitting the on the widget after the call the details filled in the dialler will be reflected in the **“Closed Activities”** section in the lead’s details with all the fillers.



The screenshot shows the 'Closed Activities' section for the lead 'Somnath Phulari'. The 'Calls' tab is selected, showing a list of call activities:

Subject	Call Start Time	Call Owner	Call Result	Description
Outgoing call to Somnath Phulari	Mar 13, 2024 05:16 PM	Jaswinder Singh Dadwal	Not interested	Outgoing Call To Remarks - test
Outgoing call to Somnath Phulari	Jul 11, 2022 10:58 AM	Jaswinder Singh Dadwal	Interested	Outgoing Call To Remarks - Thank you
Outgoing call to Somnath Phulari	Jul 11, 2022 10:50 AM	Jaswinder Singh Dadwal	Interested	Outgoing Call To Remarks - Busy
Outgoing call to Somnath Phulari	Jul 8, 2022 03:58 PM	Jaswinder Singh Dadwal	Interested	Outgoing Call To Remarks - busy
Outgoing call to Somnath Phulari	Jul 8, 2022 03:57 PM	Jaswinder Singh Dadwal	Interested	Outgoing Call To Remarks - busy
Outgoing call to Somnath Phulari	Jul 7, 2022 07:07 PM	Jaswinder Singh Dadwal	Interested	Outgoing Call To Remarks - test
Incoming call from Somnath Phulari	Jul 7, 2022 06:06 PM	Jaswinder Singh Dadwal	Interested	Incoming Call From Remarks - busy
Outgoing call to Somnath Phulari	Jul 7, 2022 06:05 PM	Jaswinder Singh Dadwal	Interested	Outgoing Call To Remarks - busy

- On clicking the **phone icon** on the dialler the manual panel for dialling pops out for manual dialling.
- Following entering the number a blank CRM Page will appear for the dialler person to fill in to make a fresh entry in the leads table



- On clicking the logout, the panel will logout.

