



# User Guide

Fuze Connect for Zoho CRM

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# Introduction

Fuze Connect is a desktop application which automatically looks up Zoho CRM data during a call, to give you the information you need about the caller at a glance.

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## Getting Started

Fuze Connect is offered as a desktop application. To install Fuze Connect on your computer, you can download the executable from Fuze servers.

1. Open your web browser and navigate to the Fuze Connect download link:
  - <https://fuzeconnect.gts.fuze.com/>

Your browser should automatically download the Mac or Windows installer that is specific to your platform.

2. Open the downloaded Fuze Connect installer, and follow the installation instructions.



## Initial Setup

Perform the following actions to set up Fuze Connect with Zoho CRM

- Once installation is complete, you may start Fuze Connect.
- On first run, you will need to log in to your Fuze account.
- On this screen, enter your **Fuze Username** and click **Next**.
- Depending on your account settings, you will either be prompted for your **Fuze Password**, or redirected to your **authentication provider** to complete your login.



## Welcome

Enter your username or e-mail to sign in

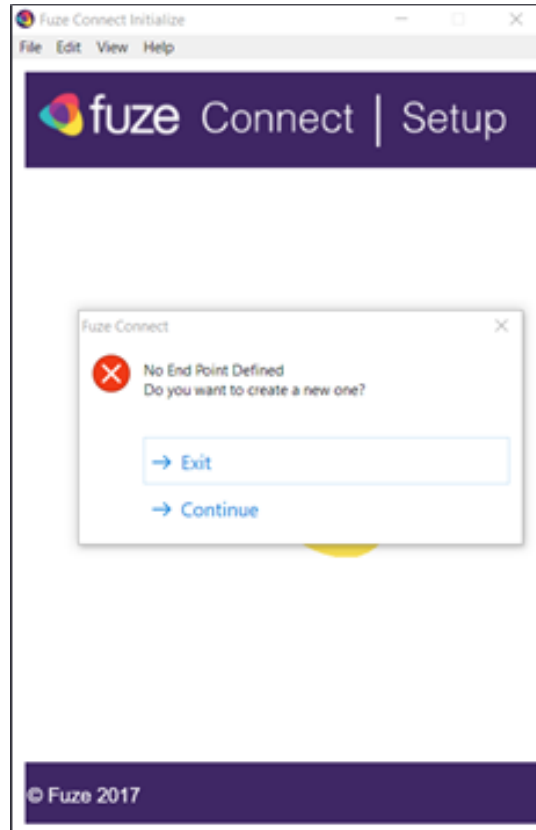
NEXT

Forgot your [username](#) or [password](#)?

## Authorizing Zoho CRM

Once you log in with your Fuze account, additional authentication will be required to complete the connection between Fuze and Zoho CRM.

**If you receive the following message, you must authorize your connected Zoho CRM integration before you can use Fuze Connect:**



1. Click **Continue** to be redirected to your Zoho CRM



### Sign in

to access Accounts

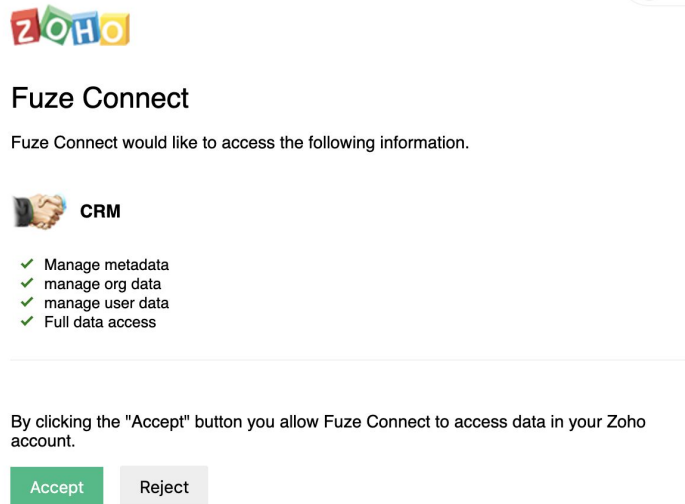
NEXT

[Forgot Password?](#)

Sign in using



2. If necessary, log in to your Zoho CRM. In some cases a screen asking for authorization for Fuze Connect to be able to access Zoho CRM may appear and user should accept it.

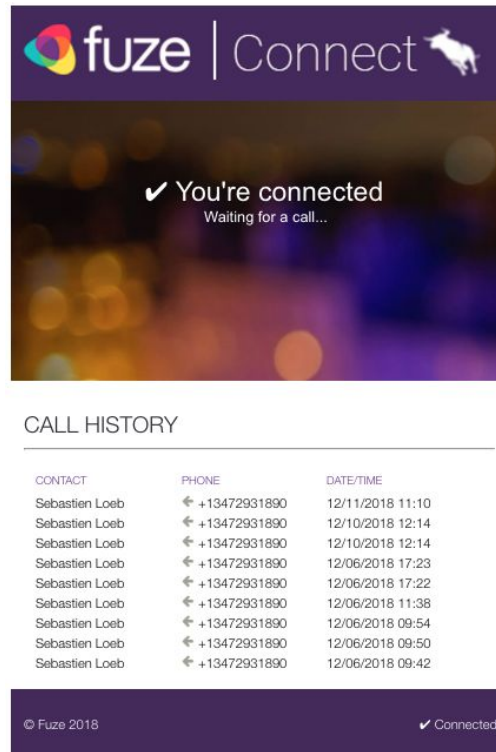


After the Oauth2 process is finished a Fuze Connect landing page will appear on the browser.

Once Fuze Connect has been authorized with your Zoho CRM instance, you can begin using Fuze Connect right away.

## Idle Screen



While you are not on a call, Fuze Connect will display the following Idle Screen:



### *Fuze Connect Idle Screen*

The idle screen shows the connection status of Fuze Connect.

Below the status text and image is the Call History, which shows all calls made or received while Fuze Connect was open and active.

- A **left arrow**  indicates an **Inbound Call**.
- A **right arrow**  indicates an **Outbound Call**.

Clicking on a record in the Call History will dial that contact at the number shown.

*Calls initiated in this way will be made using your preferred Click to Call device, as configured in the Fuze Customer Portal.*

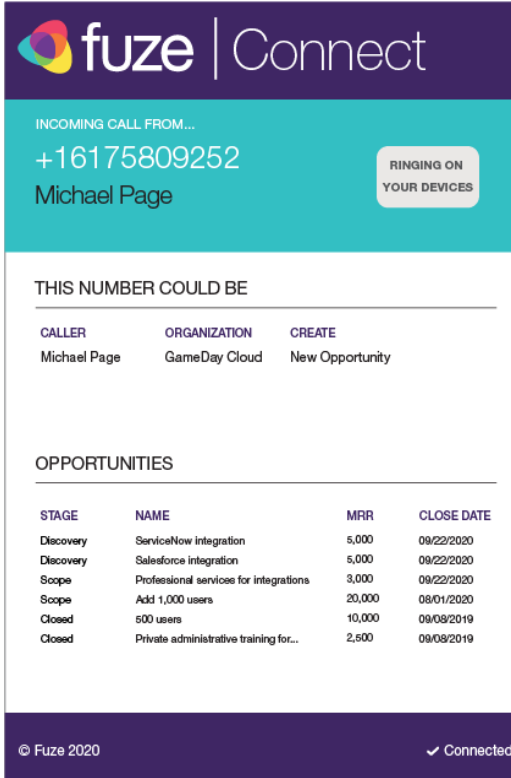
## Inbound / Outbound Calls

On an incoming or outgoing call, the Connector will present relevant information by performing a lookup in your connected Zoho CRM environment based on the caller's phone number and Caller ID.

Once the lookup is complete, a table will be displayed which shows relevant data.

Fuze Connect will attempt to match the phone number to any accounts in the connected Zoho CRM environment.

Contacts/Leads/Accounts will be searched matching the phone number and if it will be displayed in the primary area if found. When there is a Contact Match, the integration will display related Opportunities



The screenshot displays the Fuze Connect interface. At the top, it shows the Fuze logo and the text 'fuze | Connect'. Below this, it indicates an 'INCOMING CALL FROM...' with the phone number '+16175809252' and the name 'Michael Page'. A 'RINGING ON YOUR DEVICES' button is visible. The main section is titled 'THIS NUMBER COULD BE' and contains a table with the following data:

CALLER	ORGANIZATION	CREATE
Michael Page	GameDay Cloud	New Opportunity

Below this table, there is a section titled 'OPPORTUNITIES' with a table listing various opportunities:

STAGE	NAME	MRR	CLOSE DATE
Discovery	ServiceNow integration	5,000	09/22/2020
Discovery	Salesforce integration	5,000	09/22/2020
Scope	Professional services for integrations	3,000	09/22/2020
Scope	Add 1,000 users	20,000	08/01/2020
Closed	500 users	10,000	09/09/2019
Closed	Private administrative training for...	2,500	09/09/2019

At the bottom left, it says '© Fuze 2020' and at the bottom right, it says '✓ Connected'.

### *Incoming call info*



## On-Call Actions

The following actions can be performed on the associated data in Fuze Connect while on a call:

- Click on the **Caller Name** to open that contact in your connected Zoho CRM.
- Click on the **Opportunity** listing to automatically open that record in your connected Zoho CRM.
- Click on the **New Opportunity** link creates a new opportunity on Zoho CRM and pops it on the browser.

## Call Notes and Wrap-Up

When the call ends, a Notes window will be opened for the user to be able to add call notes related to the contact/lead/account of the call and select a Wrap-Up code. If an opportunity or a new opportunity link is clicked, then the phone call entry is also associated with that opportunity.

Call notes will also include a link to the associated call recording link. NOTE: Call recordings are stored on the Fuze platform for a defined amount of time, currently 60 days. If a user clicks on a call link for a call that is older than this defined time, they will receive an error or notification that the link is expired.



*Call Wrap-Up Window, displayed after each call if enabled*

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