



A Description of the Amazon Connect - Zoho PhoneBridge Integration



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Overview

The Amazon Connect for Zoho PhoneBridge integration helps initiate all sales calls right from within a Zoho CRM account. A person can view the caller's information while they receive calls for their Amazon Connect number, thus ensuring better communication.

The high points of this integration are listed below:

- The Click-to-Call feature allows sales reps to complete calls with a single click from Zoho applications, and create an integrated phone system that offers more value to potential customers.



Melinda Anderson - Ventura Capitalists [Follow](#)

Contact Owner

Quinn Rivers

Email

melinda.anderson@ventura-capitalists.com

Phone

Call (202) 555-0124

Mobile

Call +1-202-555-0180

Department

Purchase

Territories

[Assign](#)

- This integration will give call pop-ups on all incoming calls, notify agents of any missed calls, and let them set reminders for their outbound calls.



Melinda Anderson

Calling...

ANSWER



Melinda Anderson

Ventura Capitalists

Lead Owner	Quinn Rivers
Email	melinda.a@ventura.com
Phone	+14083529191
Mobile	
Lead Status	Contacted



- Through contextual calling, a business card view with the lead's contact information, owner, and status will be displayed every time an agent reaches out to a lead or customer.

The screenshot displays the Zoho CRM interface for a call record titled "Price Negotiation - Ventura Capital". The main view shows call details such as Call Type (Outbound), Call Purpose (Negotiation), Call Duration, Call Owner (Quinn Rivers), and Modified By (Quinn Rivers, Wed. 25 Jan 2017 06:45 PM). A "Notes" section contains a note: "Customer interested in 1000 widget package. Price negotiation required." Below the notes is a text input field for adding a new note. The "Links" section is currently empty, displaying "No Links found".

On the right side, there is a contextual calling overlay for Melinda Anderson. The overlay includes a "Call" button, an "Edit" button, and a "Send Email" button. Below these buttons, the overlay displays Melinda Anderson's contact information: Ventura Capitalists, phone number +14083529191, and email melinda.a@ventura.com. The overlay also shows "0 Followers" and a "More Info" link. At the bottom of the overlay, there is a "Call Description" field.



- The Call Analytics Reports help agents gain valuable insights based on their call data.

Navigation: Home Feeds Leads Contacts Accounts Potentials Activities Reports Dashboards ***

← Email and Call Analytics Report Export to PDF Duplicate

Summarize By: Date | Group By: Day | Date Range: Last 7 Days | Filter

Filters: 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)
07/20/2016	17	9	16	42	7	14	0	162
07/19/2016	32	13	4	37	12	3	1	184
07/18/2016	11	16	9	28	13	12	1	65
Sum	60	38	29	107	32	29	2	411

Total records in this page: 3 < 1-3 >

- Calls can be made directly from a browser.
- The integration can be enabled easily, with just a single click.

Note: Before integrating Amazon Connect with Zoho CRM, the following prerequisites should be in place:

- An Amazon Connect instance
- Any paid edition of Zoho CRM



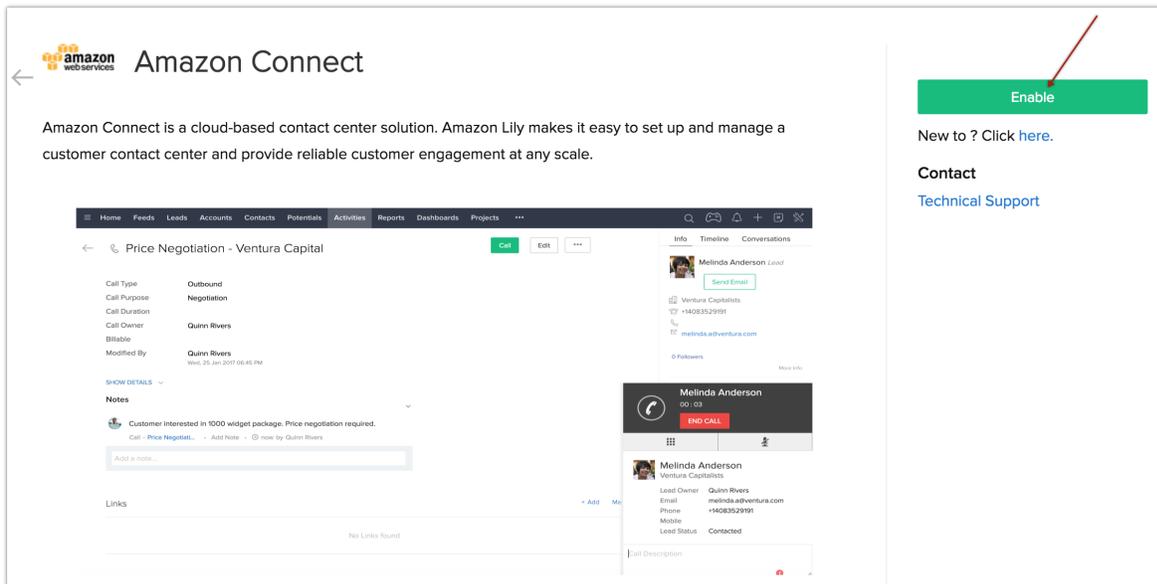
Configuration

Configuring Amazon Connect in Zoho CRM involves two important steps:

- **Enabling the Amazon Connect integration**
- **Logging in to the Amazon Connect account in Zoho CRM**

To enable the Amazon Connect integration:

1. Click **Settings > Setup > Channels > Telephony**.
2. Select **Amazon Connect** from the available list of PhoneBridge integrations.
3. Click **Enable**.



Note:

After clicking Enable, please wait while the page refreshes automatically. Do not click anywhere else until the *Amazon Connect Login* screen appears.

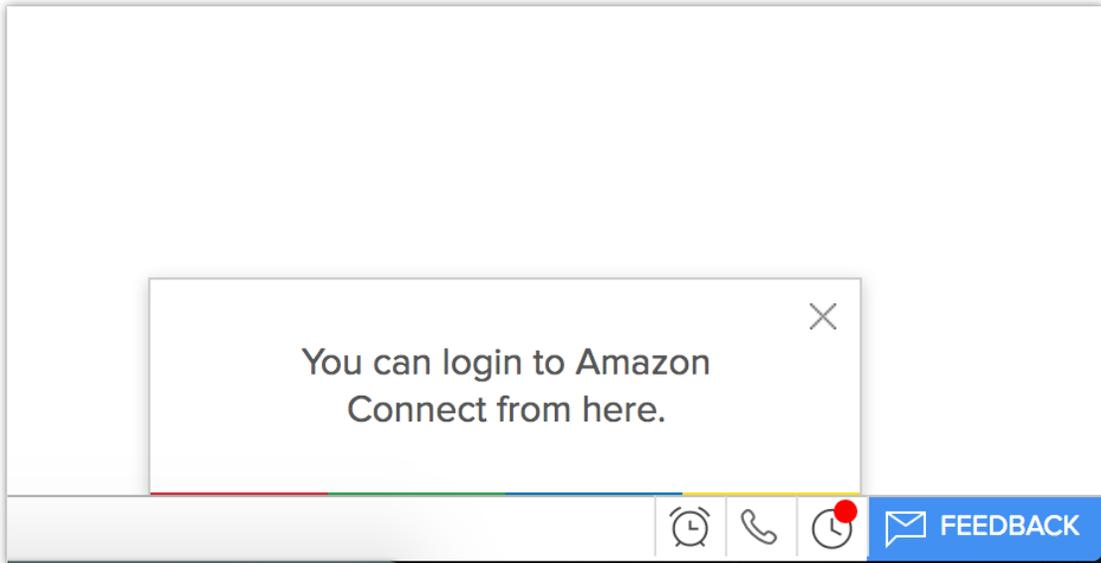


Logging in to Amazon Connect:

Once you have enabled the Amazon Connect integration, you will be prompted to log in to your AWS account from Zoho CRM.

1. Click **Login to Amazon Connect**, and enter the Instance Alias name that you created for Zoho CRM in your Amazon console.

2. Clicking on **Login to Amazon Connect** will open a new Amazon Connect Login window. Please enter the login details here. Once you are successfully logged in, the window will close automatically.
3. If you wish to log in later, you can use the Phone icon at the bottom right of the page to access the Amazon Connect Login screen.



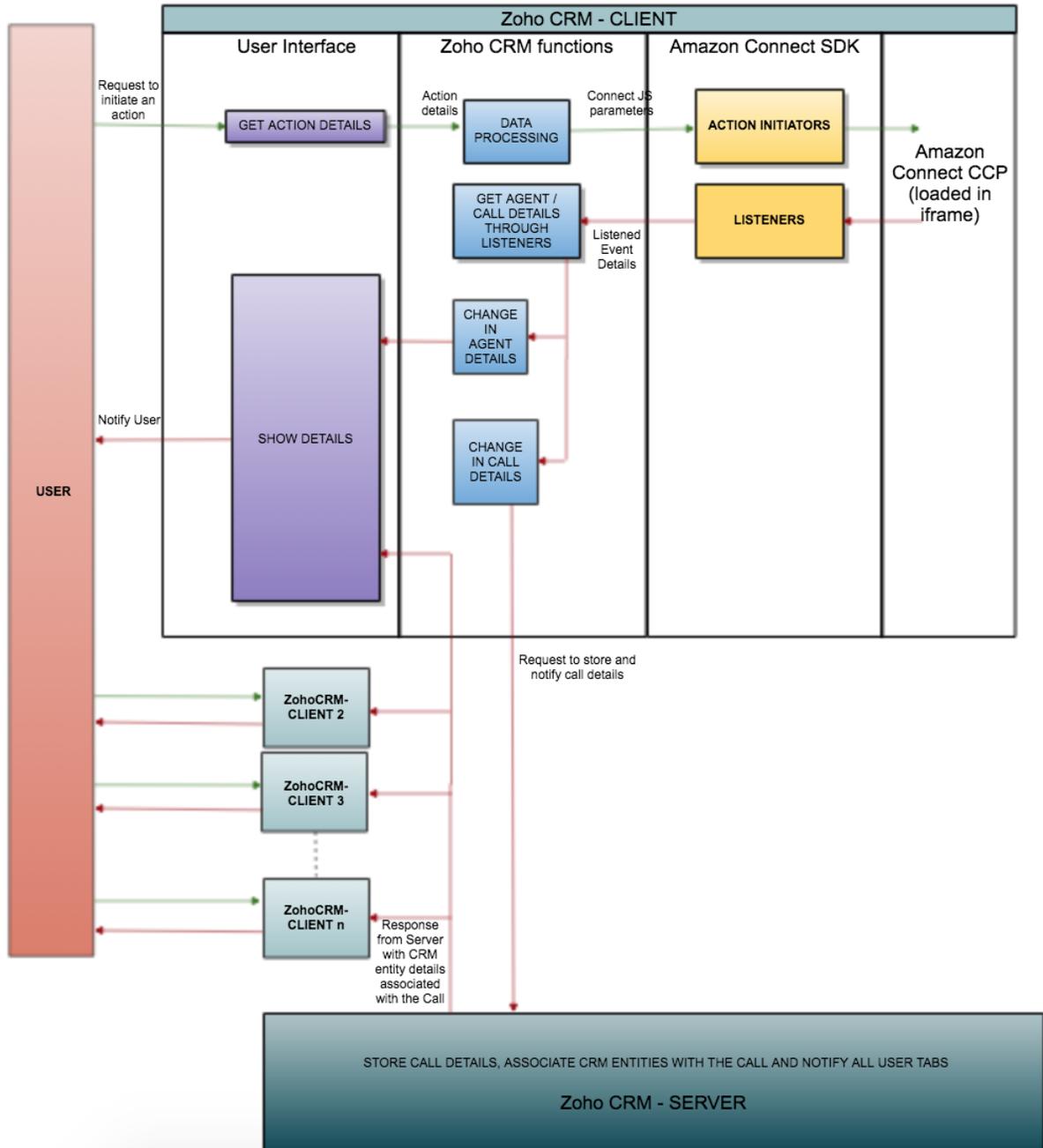
Note:

- The Zoho CRM domain should be added in the Applications Integration section of the instance from the Amazon console.
- The mapping of phone numbers, agents, queues, and call flows can be configured on the Amazon Connect page.
- Only Zoho CRM Administrators can enable the Amazon Connect integration. After enabling, each Zoho CRM user can log in to their Amazon Connect account from Zoho CRM by providing the Amazon Connect instance name.



Architecture

The general layout architecture for the Zoho CRM - Amazon Connect integration is shown below:





Note:

- Amazon Connect is the only AWS service involved in this integration.
- This integration only uses Stream JS APIs.

Glossary of Terms:

Action Initiator:

This informs Amazon Connect to initiate call actions, such as making calls, holding calls, and changing agent status.

Data Processing:

This refers to the processing of Zoho CRM data, so that Amazon Connect can smoothly utilize it to achieve the actions initiated.

Get Action Details:

This refers to getting the details of the actions performed by the Zoho CRM user.

Explanation of the Reference Architecture

Making outgoing calls from Zoho CRM:

When a Zoho CRM user goes to the Setup page and enables the Amazon Connect integration, the Amazon Connect Contact Control Panel (CCP) will be loaded in Zoho CRM for the integration to work. Once the user completes the integration, a call icon will be shown adjacent to the Phone Number fields in the Zoho CRM modules. The user can use this call icon to make calls from within their CRM account. Whenever a user initiates a call, Zoho CRM will search for that phone number in the Zoho CRM database, and will display relevant information about that lead or contact. Then, Amazon Connect will be notified by Zoho CRM to initiate the call through the Amazon Connect CCP. This CCP connects to the Amazon Connect CTI (Computer Telephony Integration) service through a Connect Shared Worker.



Making outgoing calls from the Amazon Connect CCP:

A user can also make outgoing calls from the Amazon Connect CCP. When this happens, Amazon Connect will notify Zoho CRM that a call has been initiated, along with details of the call. Once Zoho CRM gets the call information, it will search for that phone number in the Zoho CRM database, and will display the relevant information about the number dialed for the user.

Receiving calls in Zoho CRM:

When a user receives an incoming call, the Amazon Connect CCP will notify Zoho CRM. Once Zoho CRM receives this information, it will search for that phone number in the Zoho CRM database, and will display the relevant information about the incoming call for the user.

Performing call actions, such as answering, hanging up, and holding:

A Zoho CRM user can answer, hold, and hang up. When any of these actions are performed, Zoho CRM will notify Amazon Connect. The Amazon Connect CCP connects to the Amazon Connect CTI service, and completes the respective call action.

Note:

- Lambda functions are currently not part of this integration.



Security

Zoho CRM integrates with Amazon Connect by loading the Contact Control Panel (CCP) into Zoho CRM as a hidden inline frame. All the API requests and data sharing are securely made through the CCP.

Authorization -

The Zoho CRM domain must be whitelisted in the user's Amazon Connect instance under the Applications Integration section. This is to make sure that only authorized domains can access the Amazon Connect CCP, and pass data.

Authentication -

Once the Zoho CRM domain is whitelisted in the Amazon Connect instance, Zoho CRM users must provide their Amazon Connect instance name to initiate the login process. They will be asked to provide their login details in the Amazon Connect Contact Control Panel associated with the instance provided. Further communications from Zoho CRM to Amazon Connect will be done through the Amazon Connect CCP.



Troubleshooting

Q: Why am I am not able to make calls from my browser?

A: Please check if you're using a browser that is supported by the [AWS Management Console](#).

Q: All my calls are either being dropped immediately, or not getting connected at all. Why?

A: If you have not allowed microphone access in your browser, this could happen. Check your browser settings.

Q: Whenever I try to call from Zoho CRM (through the Click-to-Call feature), I get an error message saying "Unable to make a call." What should I do?

A: You need to check the format of the number you have saved for that record in Zoho CRM. Make sure that you've entered the phone number in [E164 format](#).

Q: When I try to call from Zoho CRM, the Amazon dialer opens but the call doesn't get initiated. Why?

A: The [Zoho CRM domain](#) needs to be whitelisted in your Amazon Connect instance. Refer to our [help guide](#) for further instructions.