



G O L D T E L

Hosted PBX for **Z O H O**

Quick Setup Guide



# Prerequisite

- In order to integrate your telephone system with Zoho, you need to have the correct product licensing configured.
- To do this, please send contact our admin team at [applications@goldtel.co.za](mailto:applications@goldtel.co.za) or our technical team at [support@goldtel.co.za](mailto:support@goldtel.co.za).
- We will gladly prepare the system environment for you to get you up and running in no time.



# Integration

- Link your company's Goldtel Hosted PBX tenant to your Zoho tenant
- **Step 1:** Log into the Goldtel Hosted PBX Portal with your company's administrative user

Hosted PBX

Sign in

101

.....

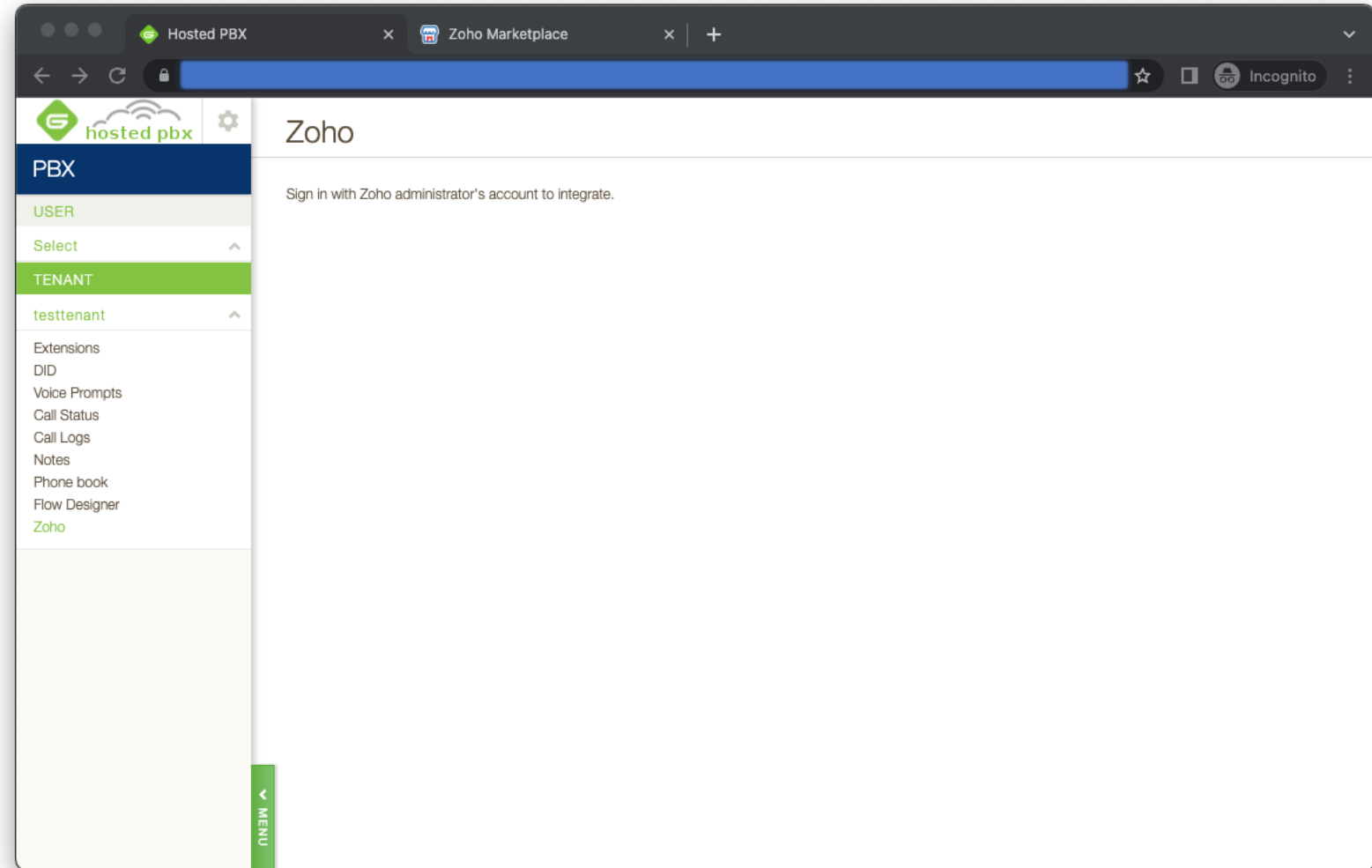
REMEMBER ME

SIGN IN



# Integration

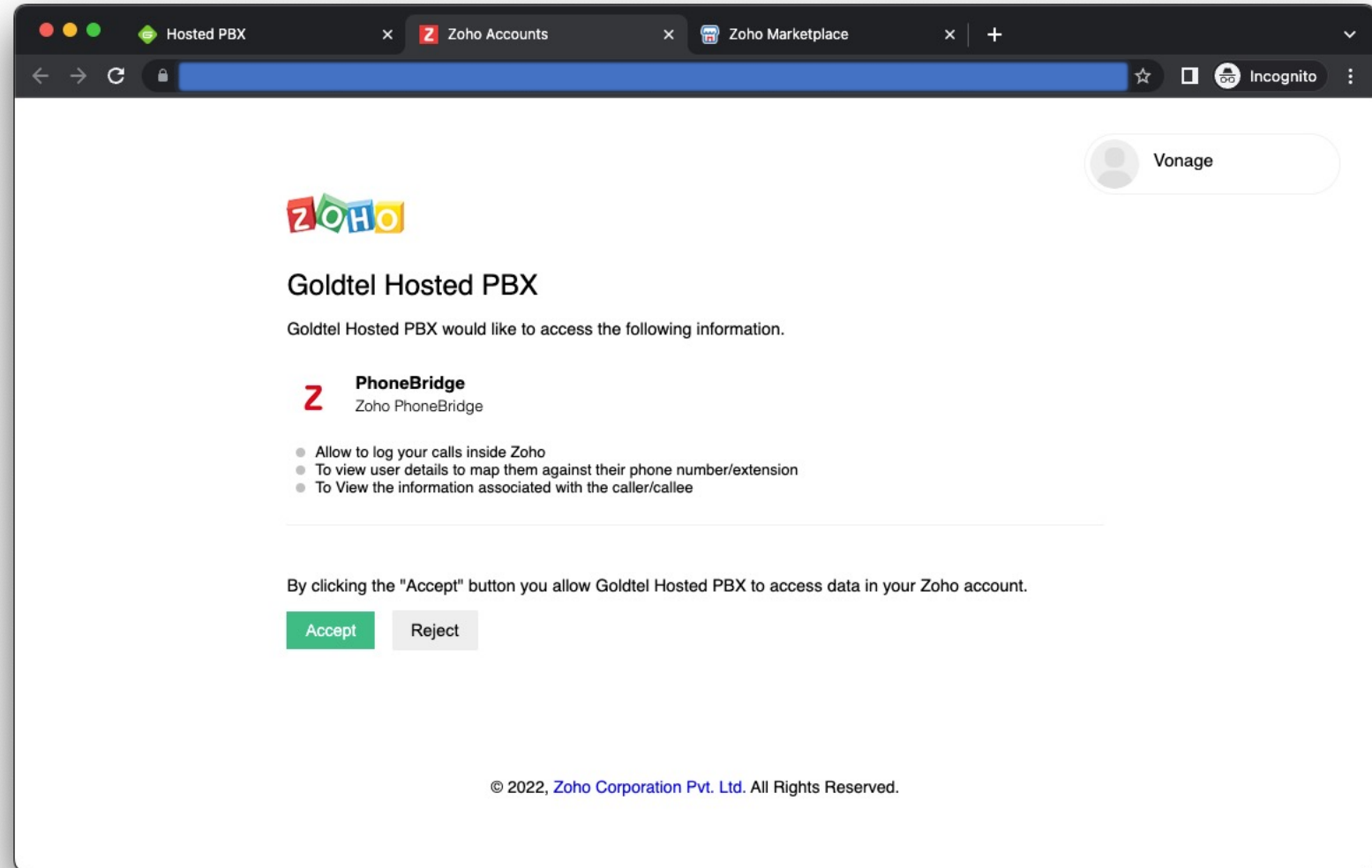
- Link your company's Goldtel Hosted PBX tenant to your Zoho tenant
- **Step 2:** Navigate to **"Zoho"** on the side menu, and click **"Sign in with Zoho administrator's account to integrate."**





- Link your company's Goldtel Hosted PBX tenant to your Zoho tenant
- **Step 3:** Grant the Goldtel Hosted PBX PhoneBridge extension access to your Zoho tenant by clicking "**Accept**".

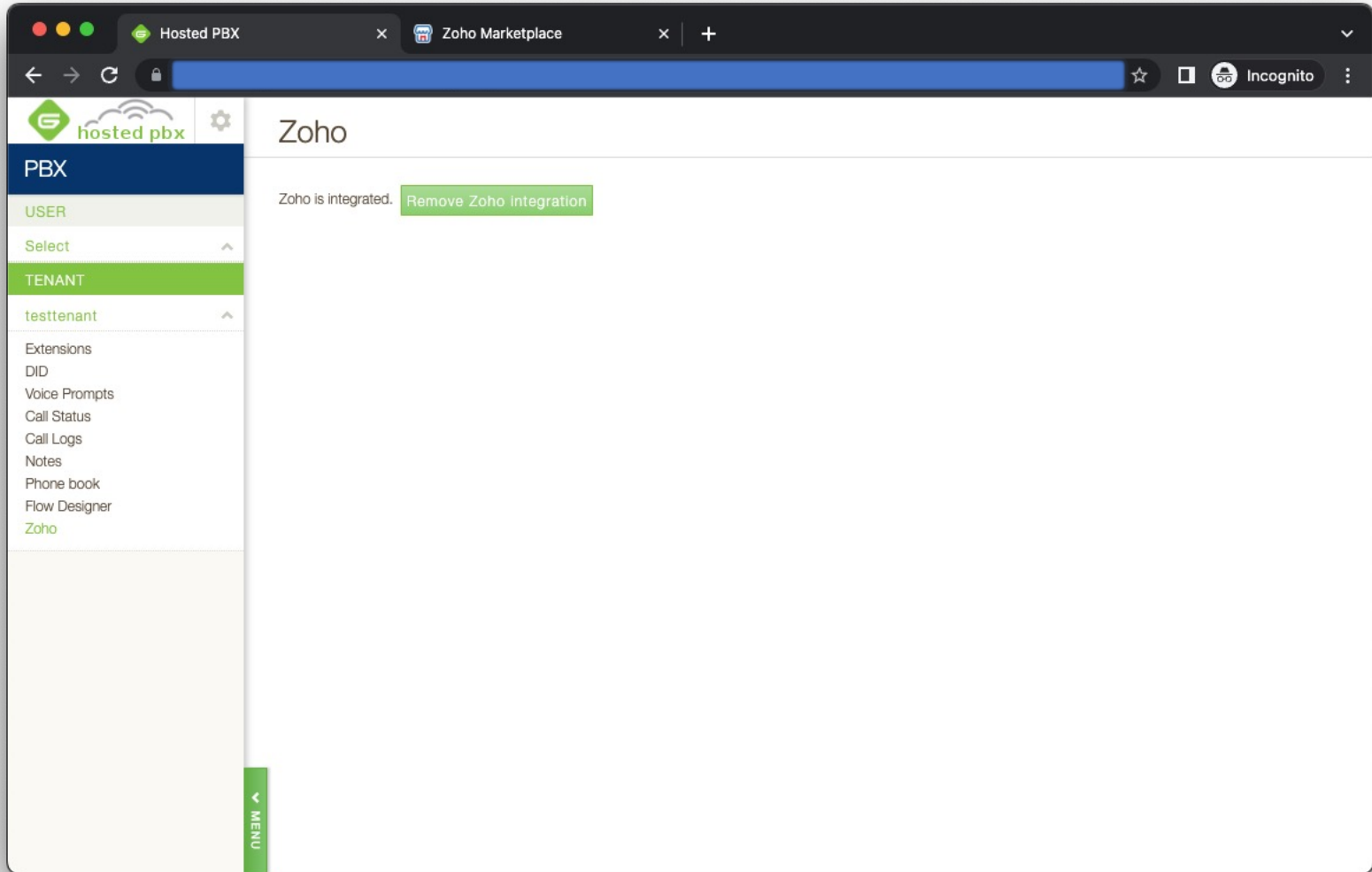
# Integration





# Integration

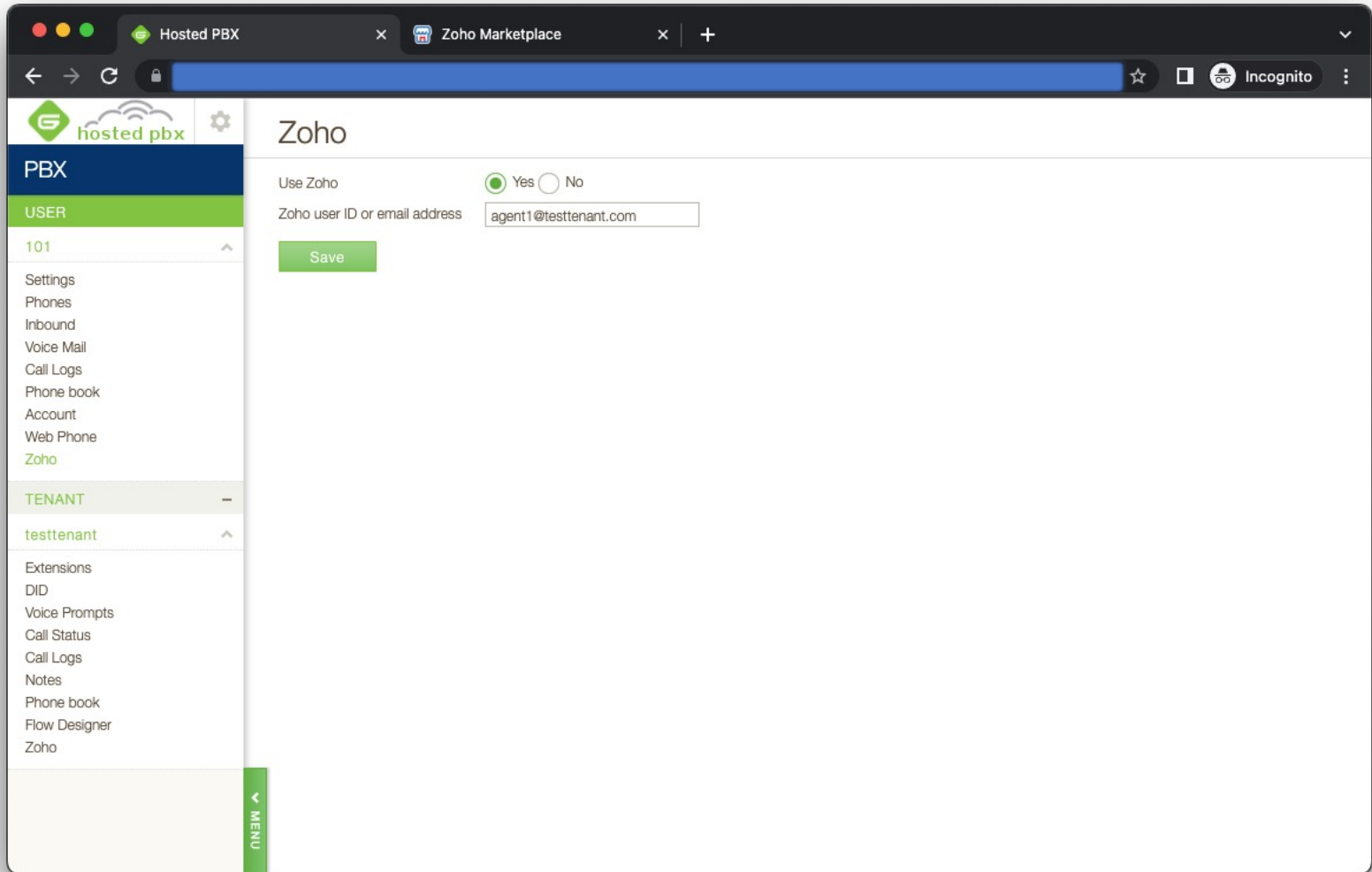
- Link your company's Goldtel Hosted PBX tenant to your Zoho tenant
- **Step 4:** You will now be redirected back to the Goldtel Hosted PBX portal. If you see "**Zoho is integrated.**", the integration has been successfully completed.





# Integration

- Link your PBX extensions to their Zoho users
- **Step 5:** Navigate to each extension user on the side menu, and click **"Zoho"**. Set the **"Use Zoho"** selection to **"Yes"**, and enter the user's Zoho email address or user ID. Click **"Save"**.





# Integration

- Verify successful user integration inside Zoho apps.
- **Step 6:** Log into Zoho and verify that the PhoneBridge controls now show in the bottom toolbar. If displayed there, it is now ready for use.

The screenshot shows the Zoho CRM interface in a browser window. The browser tabs include 'Hosted PBX' and 'Home Page - Zoho CRM'. The address bar shows 'Incognito'. The CRM navigation bar includes 'CRM', 'Home', 'Leads', 'Contacts', 'Accounts', 'Deals', and 'Projects'. A 'Free UPGRADE' button is visible in the top right. The main content area is titled 'Welcome Agent A Best Call Centre' and includes a user profile dropdown for 'Agent A Best Call Centre's Home'. The 'Open Tasks' section contains a table with the following data:

Subject	Due Date	Status	Priority	Related To	Contact
<a href="#">Remember to quote for something</a>	Jun 29, 2022	Not Started	High	<a href="#">Dewald le Roux</a>	
<a href="#">Register for upcoming CRM Webinars</a>	Dec 4, 2020	Not Started	Low	<a href="#">King (Sample)</a>	<a href="#">Kris Mari (Sample)</a>
<a href="#">Refer CRM Videos</a>	Dec 6, 2020	In Progress	Normal	<a href="#">Morlong Associates</a>	<a href="#">Mit Tollr (Sample)</a>
<a href="#">Competitor Comparison Document</a>	Dec 2, 2020	Not Started	Highest	<a href="#">Feltz Printing Service</a>	<a href="#">Car Papr (Sample)</a>

The 'Today's Leads' section shows 'No Leads found.' The bottom toolbar includes a notification bell with a red '5', a search icon, a refresh icon, a back icon, a home icon, a settings icon, and a 'Phone' icon.





Thank you!

If you require any assistance, please contact our technical support team at [support@goldtel.co.za](mailto:support@goldtel.co.za) or +27 (0) 87 630 HELP (4357)