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1. DIALOGA EXTENSION FOR ZOHO

DIALOGA provides the option of downloading and installing an extension to integrate calls with the Zoho CRM.

Several actions can be performed within this extension:

- Incoming calls
- Outgoing calls
- Automatic contacts sheet opening
- Automatic contacts recognition
- Automatic calls log
- Calls classification

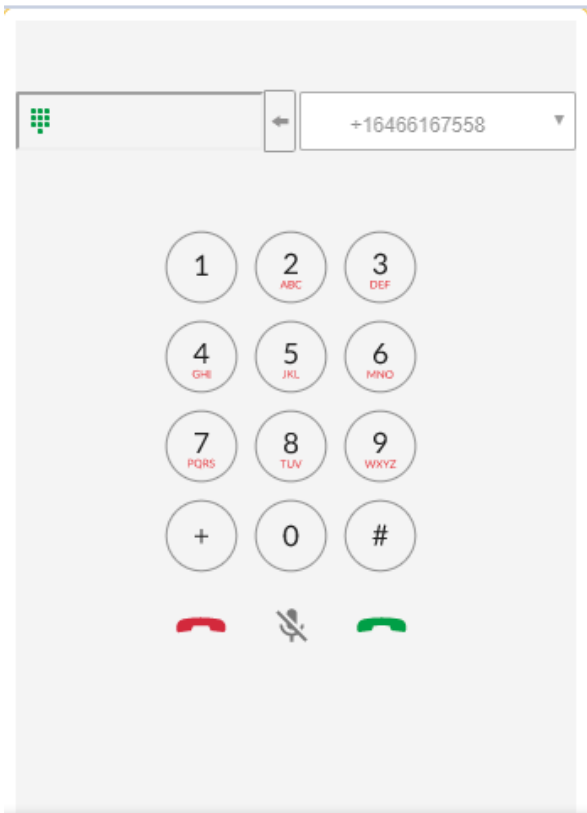
2.EXTENSION OPERATION

Once the extension has been installed, we will see the following when we access our CRM,:



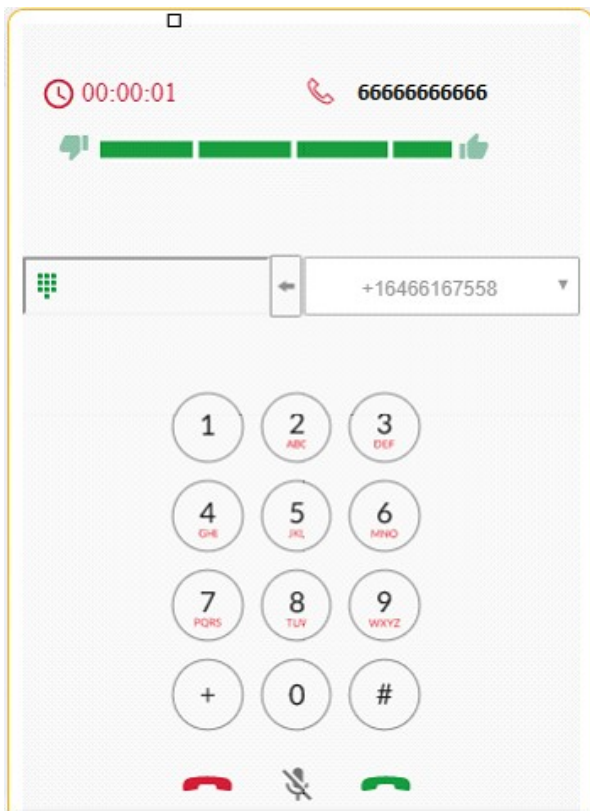
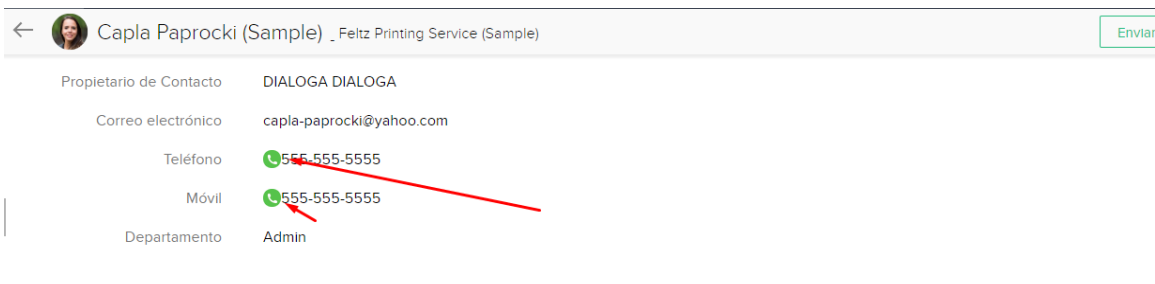
This window opens automatically and we can hide it or show it using the indicated button. We will have to enter in this window the username and password previously provided by Dialoga.

If the login has been successful, we enter into the following window, where we will already have the option of receiving and issuing calls:



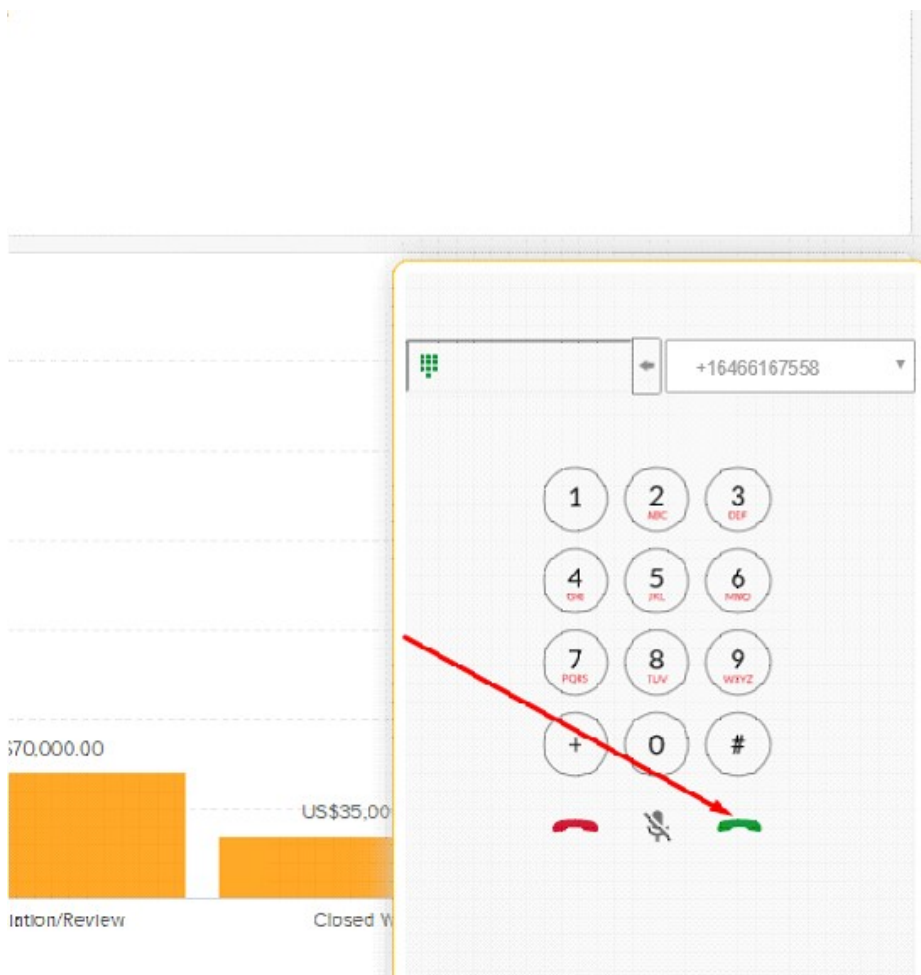
Outgoing Calls

There are two kinds of outgoing calls, direct calls from the pad or directly from contacts:



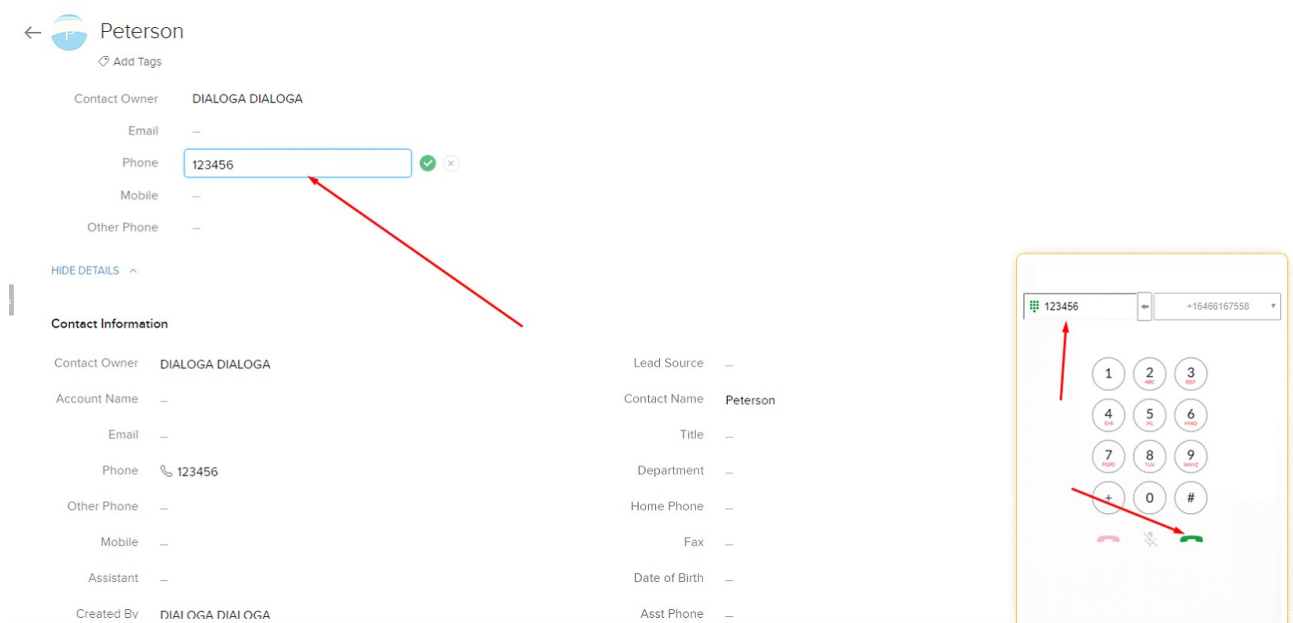
Incoming Calls

As for incoming calls, these have an incoming sound and if the widget is closed, it opens automatically.



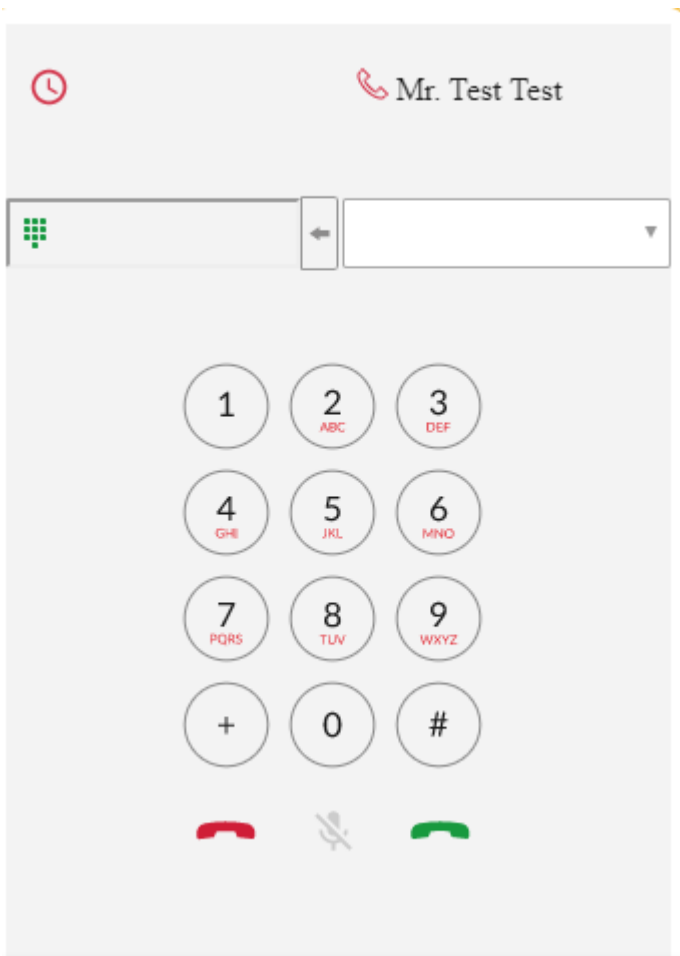
Automatic contacts sheet opening

Once we answer an incoming call, the system checks if the number is registered in the CRM and if it is, the contact sheet opens automatically.



The image shows a CRM contact sheet for a contact named 'Peterson'. The contact owner is 'DIALOGA DIALOGA'. The phone number '123456' is entered in the 'Phone' field, which is highlighted by a red arrow. Below the contact details is a 'Contact Information' section with fields for 'Contact Owner', 'Account Name', 'Email', 'Phone', 'Other Phone', 'Mobile', 'Assistant', and 'Created By'. To the right of the contact sheet is a mobile dial pad interface with a red arrow pointing to the number '123456'.

Automatic contacts recognition



Automatic log and calls classification

← All Activities

- 📞 **Call from 11111**
You Outbound 00:37
- 📞 **Call from 11111**
You Missed 00:00

Call from 11111

🏷️ Add Tags

Call Type	Missed
Call Purpose	Prospective
Call Duration	00:00

Edit ⋮

Call from 11111

🏷️ Add Tags

Call Type	Missed
Call Purpose	Prospective
Call Duration	00:00
Call Owner	DIALOGA DIALOGA
Modified By	DIALOGA DIALOGA <small>Fri, 20 Sep 2019 03:39 PM</small>

HIDE DETAILS ^

Call Information

Call From/To	—
Subject	Call from 11111 ✎
Call Purpose	Prospective
Related To	—
Call Type	Missed
Call Start Time	Sep 20, 2019 03:25 PM
Call Duration	00:00
Description	—