How to Use the integration for Daktela and CRM:

- At the beginning user should login to Daktela from the website And download software on any device.
- To login go to Daktela website with your pbx (yourpbx.daktela.com) and type your user name and password.



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- for configuring the Daktela SW phone user have to provide the Server, Extension and password .
- select the transport as UDP and check the Remember Details.

Note: server: - yourpbx.daktela.com

extention:- extension number like (200,201,900)

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• When user is logged into Daktela softphone and website go to the right corner of the page and click on Go Ready Button .



- The Dashboard shifts to ready mode . user is able to call from Daktela .
- User can click on the call icon and make the call by inputting a contact Number.

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• And user can also use softphone software to do the calls.



All The Functionalities Supported By Daktela Integration with ZOHO Extension.

Prerequisite: Loging into CRM.

Before accessing Daktela telephony system in crm user should login to crm account submit the user name and password for logging process to crm.

1.Call From Dialer

 after you signed into crm there is many ways to make calls with daktela the first way is =>go to bottom left corner of crm home page => and click on open dialer icon.

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• After clicking on the Dialer icon a Dailer page will be displayed which user can insert the contact number and.

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• After inserting the contact number click on call button.

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2.Click to Dial:

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- user can also make calls from the record list under Contacts Module
- with a short step =>click on contacts module for For Every record which has an existing phone Number beside number we have call icon =>click on call

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3. Dialing Popup:

- While calling to any contacts user will be able to view a small screen of dialing popup.
- User can view the contact information and the call status whether its connected or declined.

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<u>4. Incoming Call:</u>

Interface to Notify incoming call in ZOHO CRM when someone calling to our Daktela Number. Click on Answer to answer the call.

Note: If you are using queues in Daktela we are not able to identify for which user incoming call is assigned. So ZOHO will not notify the incoming call if you are using queues. In this case Popup will only display after incoming call is answered from Daktela device.

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5. Hangup Call:

- User is able to hangup the call. its is possible to terminate the communication by click on End button to hangup the call as in screen below.
- After clicking on End the call will be ended .

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4. Notify Call State:

• This feature will help the user to understand if the line they want to connect is busy or in some other call if the user is trying to call a busy line they will recieve a popup up message "Dialed Number Is Busy ".

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• Or if the user is trying to dial a wrong number which the contact number is not correct the user will receive a notification "Please check the Dialed Number".

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5. Notify Dialer Number State:

When dialing from CRM and Number is not active from we are dialing will notify that Daktela number is not active.

• User will get a popup message "Daktela unable to reach you to initiate the call".

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	Outgoing call to James	Calls	Μ	1ay 13, 2022 12:37	PM	May 13, 2022 12:37 PM	00:00		
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6. Call activity:

In the activity module in CRM, we can check missed, incoming, dialed call activity if there is any call.

• To check the call activities user should go to Activities module in Crm and view all logs.

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Outgoing call to Kayleigh Lace (Sample) (+441952789001)	Calls	Apr 28, 2022 10:39 AM	Apr 28, 2022 10:39 AM	00:13			
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6. Call Recording:

- If in Daktela Call recording is active, then recording of call is save in activity.
- User can go to the activity module click on any record and find the voice record.

Recordings

- user will be provided with a voice recording of his call to hear the voice recorded by the account.
- To see the voice recording Go to activity modules click on the record which you had a call with and view the call details with the voice Recorded attached.

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