

Rainbow CRM Bridge  
ZOHO CONNECTOR User Guide



Rainbow™

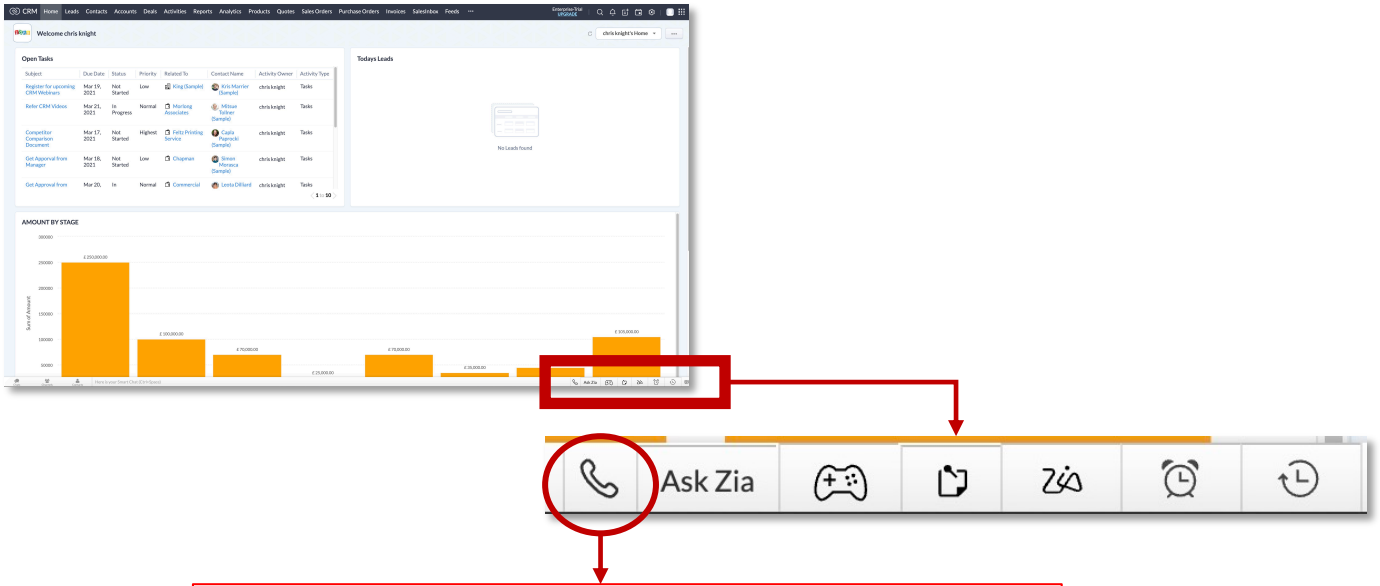
## **Introduction:**

The ZoHo Rainbow connector brings the following features to the CRM users:

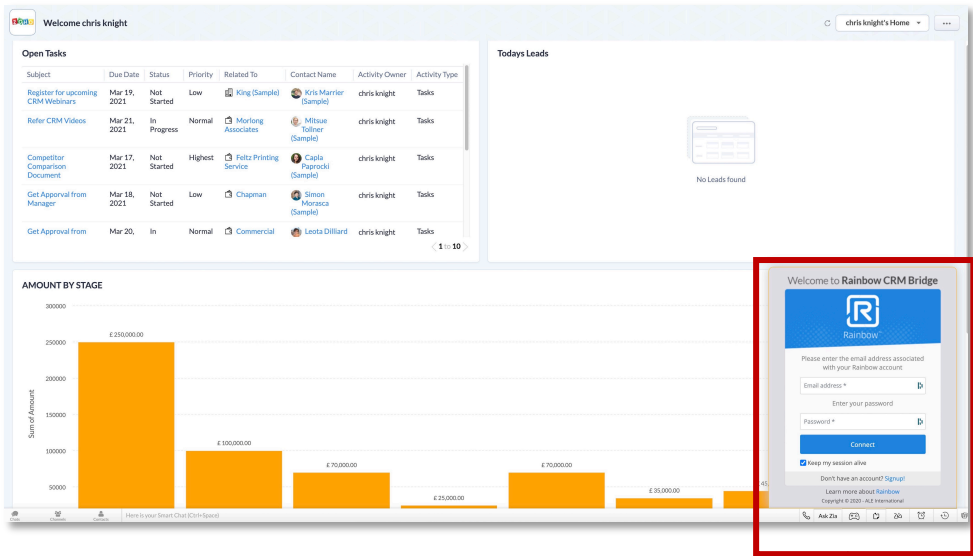
1. Click to call from Leads, Contacts and Accounts records
2. Screen Pop (Open respective contact upon incoming telephony call)
3. Activity Log (Incoming and Outgoing calls)
4. Direct Dialling (CTI Calls)

## Preliminary note:

Before starting using the connector make sure the Rainbow Client is being initiated successfully after entering the credentials provided by your administrator.



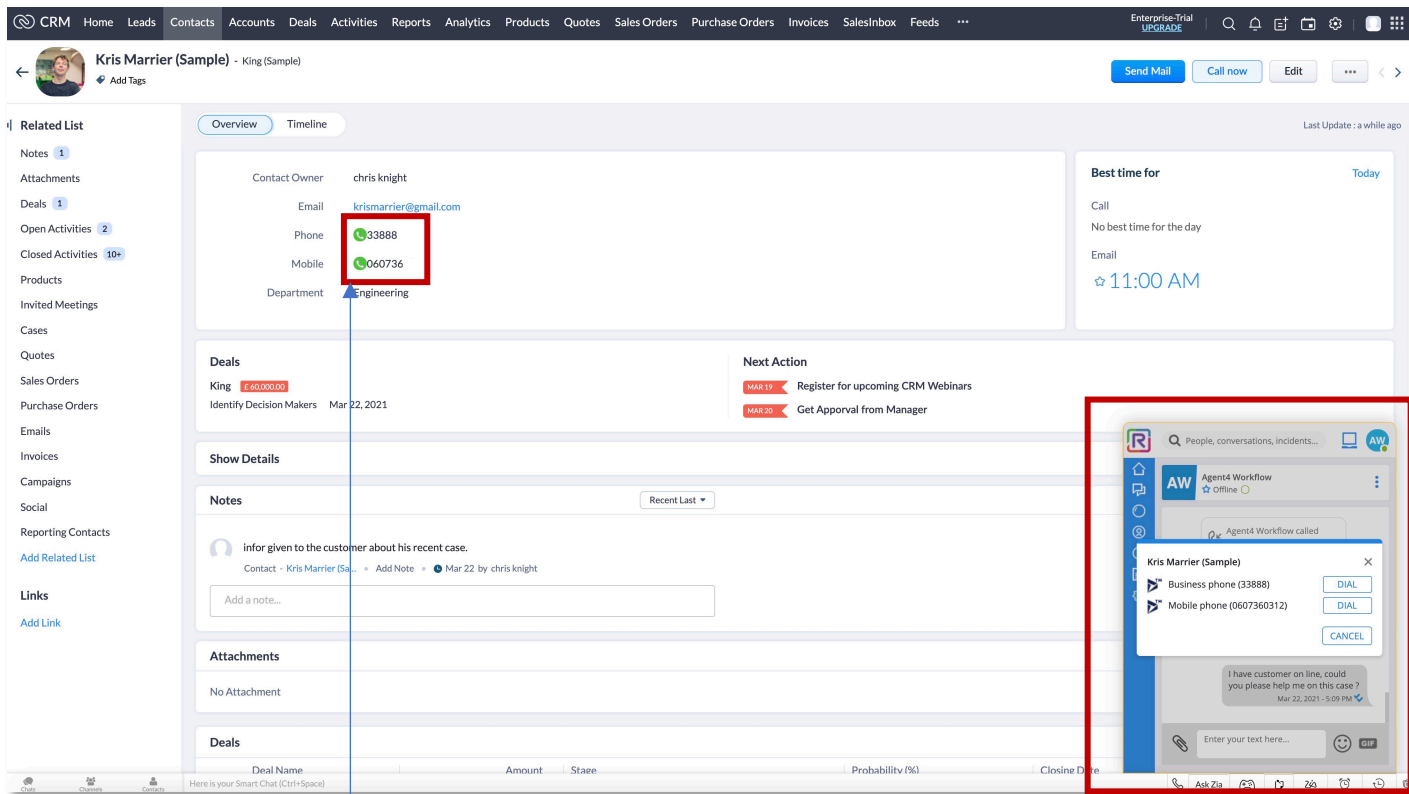
Click to Hide or Display the Rainbow client



Enter the Rainbow credentials provided by your administrator

# 1. Click to call from Leads, Contacts and Accounts records

- A phone call can be initiated from any lead, contact or account record by clicking the green phone icon that is available against each phone number in the relevant record.
- Once you click this icon, the Rainbow Client client will propose the user to select the phone number to be called as well as proposing to reach the contact via Rainbow itself if the same contact is using Rainbow as well.

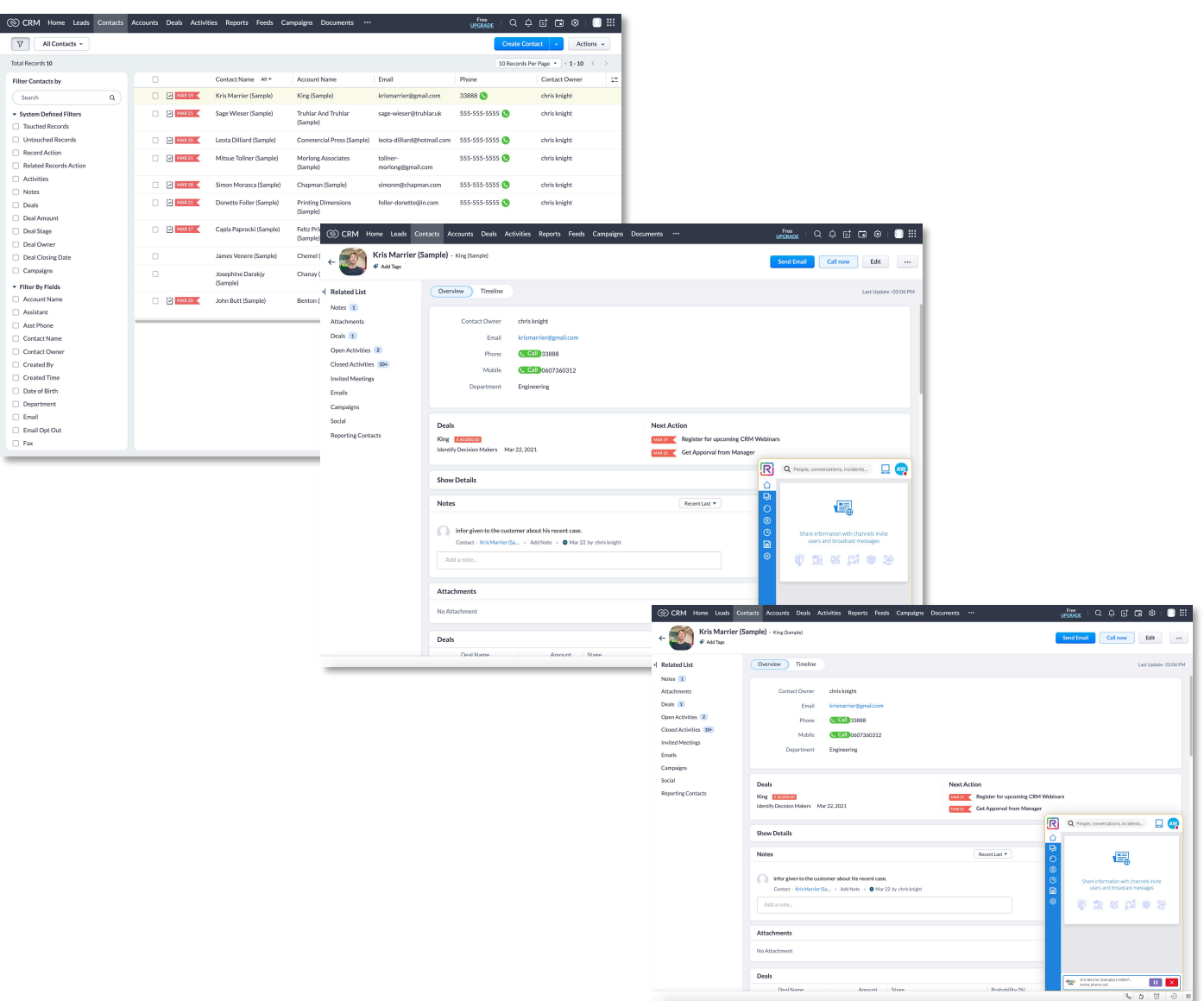


1 - Click the phone icon to initiate a call

2 – Select the number to dial in the Rainbow client. The call will be initiated as soon as the Dial option is clicked

## 2- Screen Pop (Open respective contact upon incoming telephony call)

- When an incoming call reaches the user, the corresponding record screen will open up automatically.  
i.e. : If the caller number is an identified contact, the contact record screen will pop up.
- If the caller is not identified, the user will be proposed to create a new contact



### 3- TimeLine Activity Log (Incoming and Outgoing calls)

- Each time a user will make or receive a call, the corresponding activity will be recorded and added to the Contact timeline:
  - Type of event: Incoming or Outgoing call
  - Timestamp: Date and Time
  - User name
- If the user does not answer a call, the activity will be recorded as 'Missed Call'

The screenshot shows the Zoho CRM interface for a contact named Kris Marrier (Sample). The top navigation bar includes CRM, Home, Leads, Contacts, Accounts, Deals, Activities, Reports, Feeds, Campaigns, and Documents. The contact profile header shows the contact name, a profile picture, and buttons for Send Email, Call now, Edit, and a menu icon. The left sidebar lists various activity categories with counts: Notes (1), Attachments, Deals (1), Open Activities (2), Closed Activities (10+), Invited Meetings, Emails, Campaigns, Social, and Reporting Contacts. The main content area is titled 'History' and shows a timeline of activities. The timeline is currently set to 'Timeline' view. The activities listed are:

- 8 Jun, 2021: 02:06 PM - Call added - Incoming Call Alert - Generated by RCB by chris knight 8 Jun, 2021
- 7 Apr, 2021: 04:45 PM - Call added - Outgoing Call Alert - Generated by RCB by chris knight 7 Apr, 2021
- 04:45 PM - Call added - Outgoing Call Alert - Generated by RCB by chris knight 7 Apr, 2021

The last update time is 02:06 PM.