



How to Connect Aircall to Zoho CRM

1. Introduction

The integration between Aircall and Zoho CRM enables businesses to streamline their communication workflows by automatically logging calls, accessing caller information, and managing leads directly within Zoho CRM. This guide provides a detailed step-by-step process to connect Aircall to Zoho CRM, ensuring a seamless setup for your sales and support teams.

2. Prerequisites

Before you begin the integration process, ensure that you have the following:

- An **active Aircall account** with admin access.
 - A **Zoho CRM account** with admin privileges.
 - The **Zoho CRM API key** (if required).
 - The necessary permissions to install apps in both platforms.
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3. Step-by-Step Integration Guide

Step 1: Access Aircall Dashboard

1. Log in to your **Aircall** admin account.
 2. Go to the **Dashboard** and click on the **Integrations & API** tab.
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Step 2: Navigate to Integrations

1. In the **Integrations & API** section, click on **Discover Integrations**.
 2. Search for **Zoho CRM** in the integrations list.
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Step 3: Find and Select Zoho CRM

1. Click on the **Zoho CRM** integration tile.



2. Select **Install Integration** to proceed.
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Step 4: Authorize Zoho CRM Access

1. You will be redirected to the **Zoho CRM login page**.
 2. Enter your Zoho CRM **login credentials** and click **Sign In**.
 3. Review the requested permissions and click **Accept** to authorize Aircall to access your Zoho CRM data.
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Step 5: Configure Integration Settings

1. After authorization, return to the Aircall dashboard.
 2. Go to **Settings > Integrations** and click on **Zoho CRM**.
 3. Customize the following settings:
 - **Call Logging Preferences:** Choose to log inbound, outbound, or both types of calls.
 - **Activity Logging:** Enable or disable logging of call notes and tags.
 - **Recording Access:** Decide if you want to attach call recordings to Zoho CRM contact records.
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Step 6: Map Fields Between Aircall and Zoho CRM

1. In the **Field Mapping** section:
 - Map **Aircall fields** (e.g., call duration, status) to **Zoho CRM fields** (e.g., contact notes, activity fields).
 - Ensure key fields such as **Phone Number, Contact Name, and Call Notes** are mapped correctly.
 2. Save the settings.
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Step 7: Test the Integration

1. Make a **test call** using Aircall.



2. Check if the call details appear correctly in Zoho CRM, including:
 - Contact information.
 - Call duration and time.
 - Call notes and tags.
 3. If everything is logged correctly, the integration is successful.
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4. Common Troubleshooting Tips

- **Issue:** Call logs not appearing in Zoho CRM.
Solution: Ensure that the **API key** is active and the integration is enabled in both platforms.
 - **Issue:** Field mapping errors.
Solution: Revisit the **Field Mapping** settings and ensure that all mandatory fields are correctly mapped.
 - **Issue:** Authorization error when connecting Zoho CRM.
Solution: Re-authenticate by removing the integration and reinstalling it.
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5. Best Practices for Using the Integration

- **Regularly update API keys** to prevent connection disruptions.
 - Use **custom call tags** in Aircall for more detailed reporting in Zoho CRM.
 - Schedule **weekly sync checks** to ensure all call data is properly logged.
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6. Conclusion

Integrating Aircall with Zoho CRM simplifies communication management for sales and support teams by centralizing call data and streamlining workflows. By following this guide, you can efficiently set up and manage the integration, enhancing your team's productivity and customer engagement.

Contact Us: For support or customization inquiries, reach out to us at info@tangibleconsult.com





Aircall and Zoho CRM Integration: Features and Benefits

Integration Overview

The Aircall and Zoho CRM integration is designed to streamline sales and support communications by combining Aircall's advanced voice capabilities with Zoho CRM's robust data management features. This integration allows sales and support teams to manage calls, access customer information, and track interactions directly within Zoho CRM, enhancing productivity and improving customer experiences.

Key Features

1. Click-to-Call Functionality

Description:

The integration enables users to initiate calls directly from Zoho CRM by clicking on any contact's phone number. This functionality is supported through Aircall's softphone or browser extension.

Benefit:

Click-to-call reduces manual dialing errors and saves time, allowing sales and support teams to efficiently connect with leads and customers.

2. Automatic Call Logging

Description:

All inbound and outbound calls are automatically logged in Zoho CRM, including details such as call duration, time stamps, agent notes, and call recordings if enabled.

Benefit:

Accurate call logs provide a complete communication history, helping teams understand customer interactions better and reducing manual data entry tasks.

3. IVR (Interactive Voice Response) and Call Routing

**Description:**

Aircall's IVR system allows businesses to create customized call menus that direct callers to the appropriate team based on their inputs. The integration syncs these interactions with Zoho CRM.

Benefit:

Efficient call routing minimizes wait times and ensures customers reach the right agents, improving satisfaction and resolution times.

4. Real-Time Caller Insights

Description:

When a call comes in, Aircall pulls relevant contact information from Zoho CRM, displaying it instantly for agents. This includes previous interactions, open deals, and other key details.

Benefit:

Providing agents with context about the caller enhances personalized interactions and increases the chances of successful outcomes.

5. Call Tags and Notes

Description:

Agents can tag calls with customizable labels and add notes directly from Aircall, which are then synchronized to the corresponding contact record in Zoho CRM.

Benefit:

Custom call tags enable detailed reporting and analysis, helping teams identify patterns and optimize sales strategies.

6. SMS Integration

Description:

Send and receive SMS messages directly through Aircall and log them in Zoho CRM. Messages can be linked to existing leads, contacts, or deals.

**Benefit:**

SMS integration provides an additional communication channel, ensuring timely follow-ups and enhancing customer engagement.

7. Power Dialer**Description:**

Aircall's Power Dialer integrates with Zoho CRM to streamline outbound calling by queuing and dialing multiple numbers automatically based on pre-defined contact lists.

Benefit:

The Power Dialer boosts productivity by enabling agents to focus on conversations rather than manual dialing, increasing the number of calls made per hour.

8. Voicemail and Voicemail Drop**Description:**

Agents can access voicemail directly through Zoho CRM and leave pre-recorded messages with a single click when a call goes unanswered.

Benefit:

Streamlines the follow-up process by ensuring consistent and professional voicemail messages are delivered efficiently.

9. Analytics and Reporting**Description:**

Access detailed call analytics and reports within Zoho CRM, including call volume, duration, missed calls, and agent performance metrics.

Benefit:

Advanced analytics help sales managers monitor performance, identify bottlenecks, and adjust strategies based on data-driven insights.

10. CRM Data Synchronization

**Description:**

Real-time synchronization between Aircall and Zoho CRM ensures that contact information, call records, and activity statuses are always up-to-date.

Benefit:

Eliminates data silos and ensures that all team members have access to accurate information for better decision-making.

Key Benefits**1. Enhanced Productivity**

By automating call logging, dialing, and follow-up tasks, the integration allows sales and support teams to handle higher call volumes without increasing workload. Features like Power Dialer and automatic task creation streamline workflows, enabling agents to focus on conversations and closing deals.

2. Improved Customer Experience

Real-time caller insights and access to complete interaction histories empower agents to deliver personalized service. Efficient call routing and IVR systems reduce wait times and enhance customer satisfaction.

3. Data-Driven Decision Making

Detailed analytics on call activities provide managers with actionable insights. Metrics such as call duration, success rates, and agent performance help in refining sales and support strategies.

4. Streamlined Workflows

The integration eliminates the need to switch between platforms by centralizing communication and data management within Zoho CRM. This seamless workflow integration reduces friction and improves efficiency.



5. Better Lead Management

By logging calls, voicemails, and SMS messages directly in Zoho CRM, the integration ensures that all interactions are tracked accurately. Automated follow-up tasks based on call outcomes help in timely lead nurturing.

6. Enhanced Security and Compliance

The integration ensures that all call data and customer information are securely logged and managed within Zoho CRM, adhering to industry standards for data protection. Role-based access controls further enhance security.

Conclusion

The Aircall and Zoho CRM integration is a powerful tool for sales and support teams looking to optimize their communication strategies. By leveraging advanced calling features, real-time insights, and seamless data synchronization, businesses can improve productivity, enhance customer interactions, and achieve better sales outcomes. This integration is ideal for organizations seeking a unified approach to managing voice communications and customer relationships.