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Application Note   **July 2024**
AN2407-003
Aeonix / Zoho CRM Integration

This document describes how to integrate Zoho CRM Service with Aeonix Unified Communication and Collaboration system.

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1   General

This guide goes through the necessary steps to integrate the Zoho CRM Service with Aeonix.

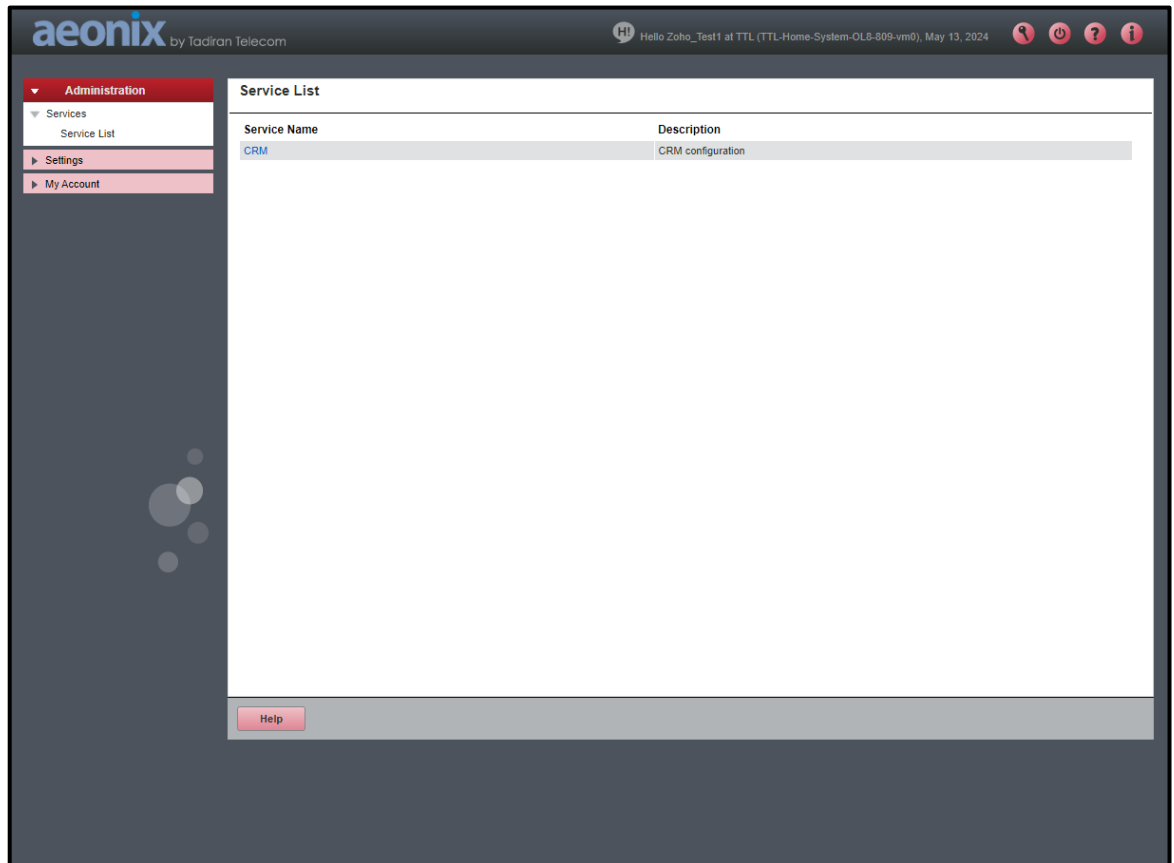# 2   Aeonix Server Setup

Open the Aeonix Admin portal.

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Please use your Aeonix Administrator credentials to sign in

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2.1 Create User's Zoho CRM Service

After logging in, navigate to **Administration->Services->Service List**. A list of services is displayed.

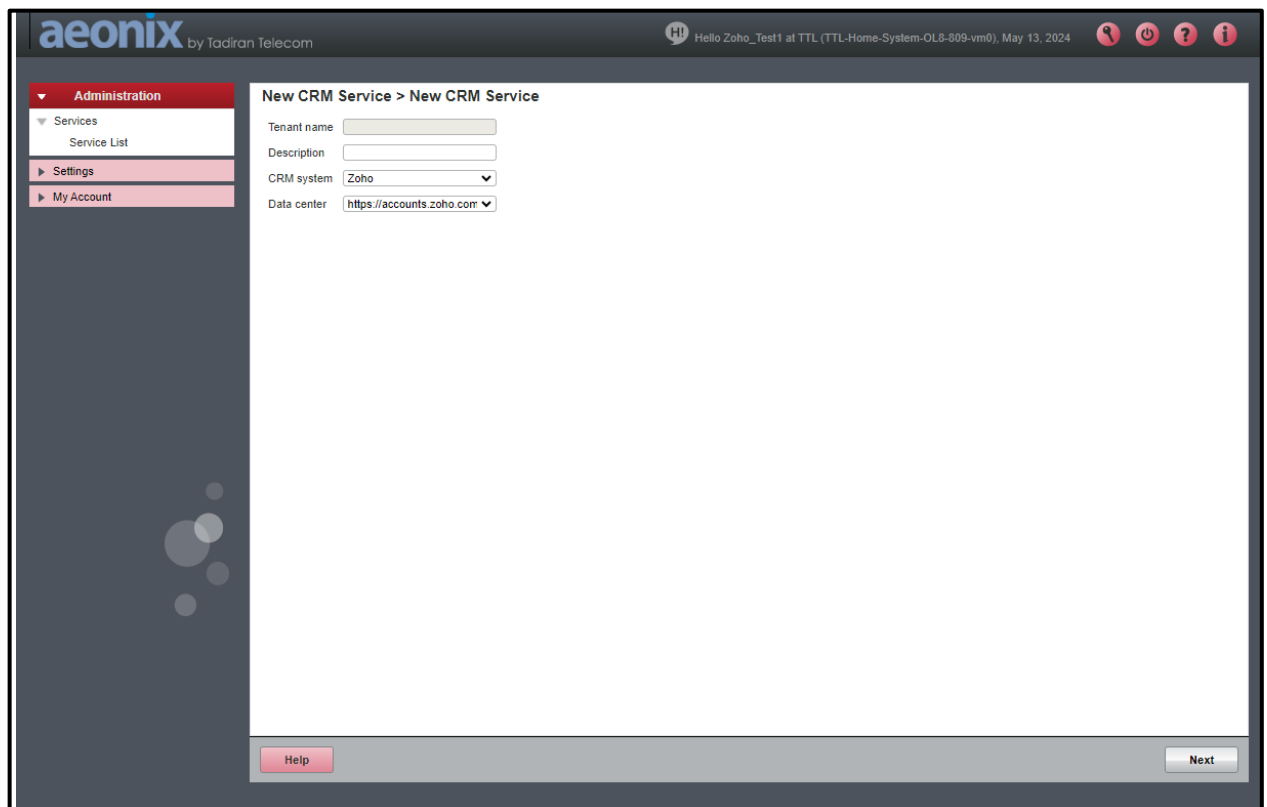Click on **CRM** service to add the service to the logged-in user.

The list of CRM service enabled for the user is displayed.

Click **Add.**

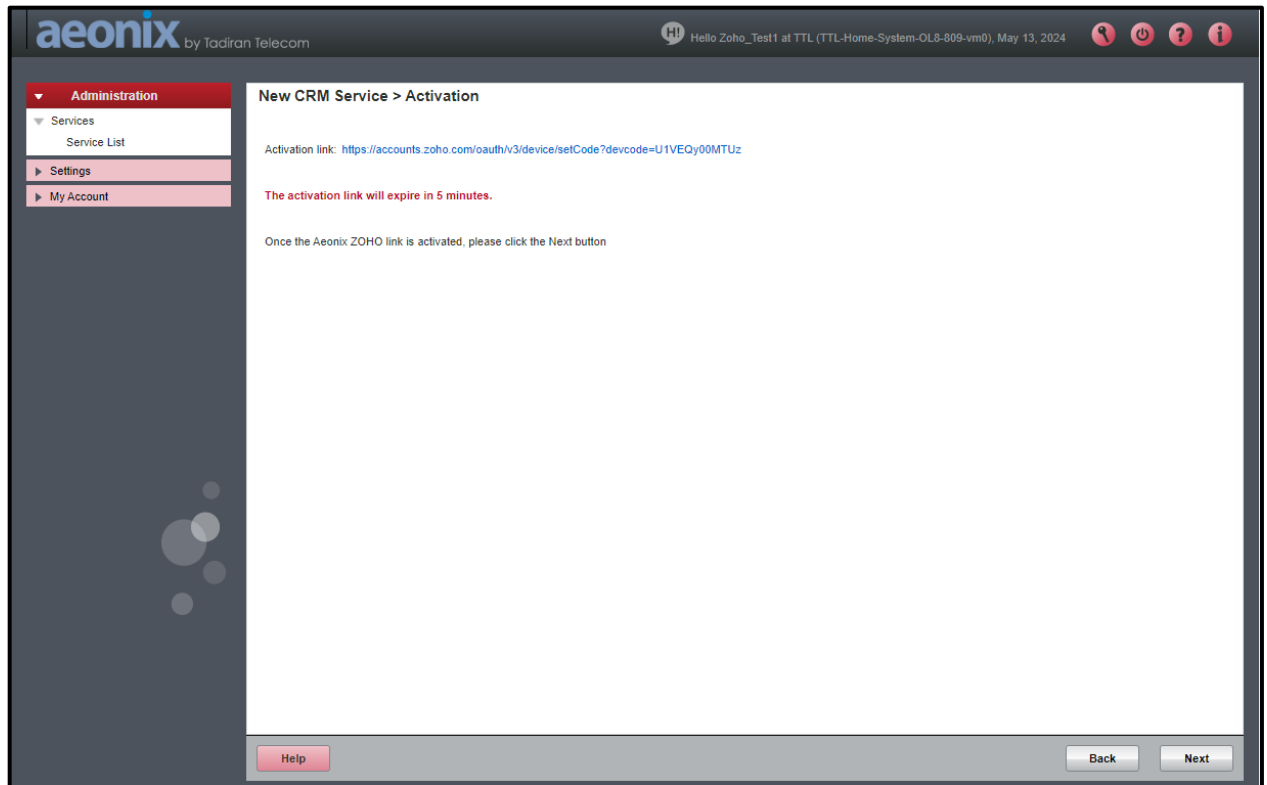The editable details of the new service are displayed as shown.

Enter a description of the user's CRM instance, and choose the type of CRM and the Data Center.

Click **Next**.

2.1.1 Connecting between the user Logged into Aeonix and Zoho

Aeonix will provide a link as shown. You **must** click on the link within 5 minutes.

The link will take you to the Zoho site, and you will be asked to login to your Zoho account (if you are not already logged in). A Zoho dialog will ask you to approve the PhoneBridge-Aeonix PBX integration. Click **Accept**

After clicking on **Accept**, continue in Aeonix, and press **Next** to proceed to the final screen for adding users.
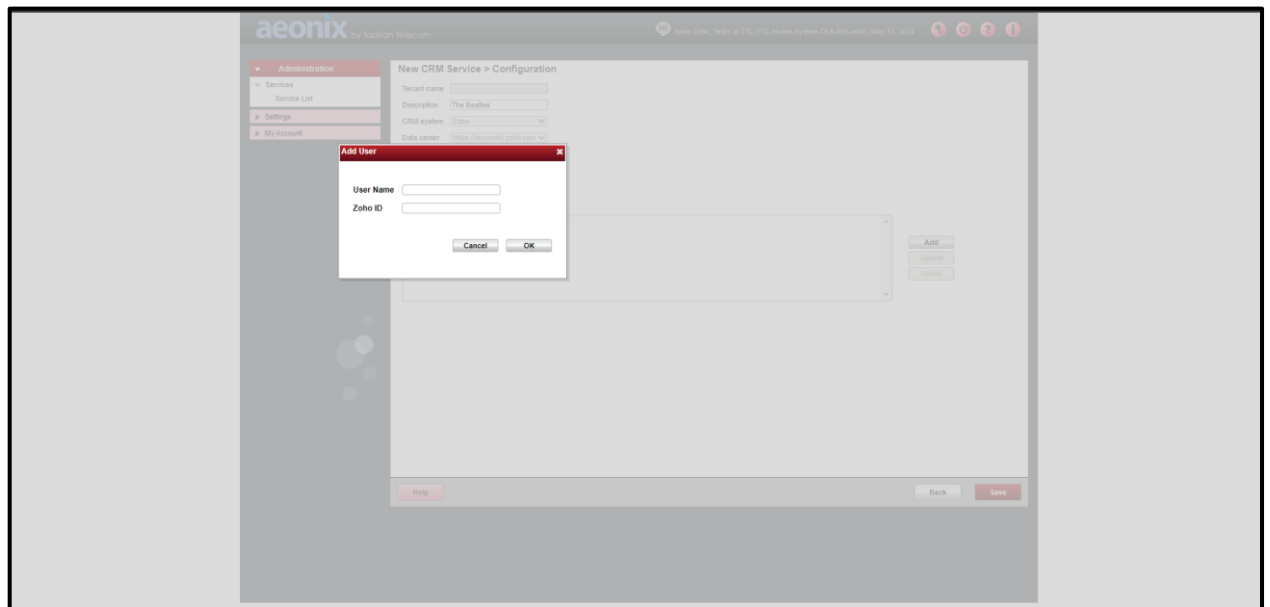
2.2 Adding Users

On this screen, you can add and remove users. When adding a user, you need to enter the username in Aeonix and the user in Zoho according to the Zoho ID.

- Click **Add**

Enter user details and click **OK**.

Once you added all users, press the **Save** button.

If you have any questions regarding this note, please contact our **Support team** at:

http://www.tadirantele.com/en/contact/support/

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