

# Working with Calls

## **READ ME**

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# Calls in Zoho CRM

Making and receiving calls are an essential part of a rep's daily activities. They need to track the calls that are made to the customers, schedule calls according to the customer's availability, take down details of the calls, and make note of the calls that were missed. In spite of their busy schedule, it's important that they jot down every detail in an organized manner to have details at hand.

The Calls layout in the Activities module gives the right platform to store and track every detail related to a call. The sales reps can enter call details like duration, date and time of calls, notes, etc.

The data can be used to evaluate the time spent on each call or the average time a call takes to complete and more details. The details can be helpful in generating reports on billing details, call status, number of calls made per day, and more.

## Customizing the Calls layout

The layout is divided into four sections, that have default fields which allow the reps to capture basic call information:

- Call Information
- Purpose of Outgoing Call
- Outcome of Outgoing Call
- Reason for Incoming Call

**Call Information** ⓘ

Contact Name	Lookup	...
Call Start Time	Date/Time	...
Call Duration	Single Line	...
Call Type	Option 1 ▾	...
Call Owner	Lookup	...
Related To	Lookup	...
Subject	Single Line	...
Created By	Single Line	...
Modified By	Single Line	...

**Purpose Of Outgoing Call** ⓘ

Call Purpose	Option 1 ▾	...
Call Notes	Single Line	...

**Outcome Of Outgoing Call** ⓘ

Call Result	Single Line	...
Description	Multi-Line	...

**Reason For Incoming Call** ⓘ

Description	Multi-Line	...
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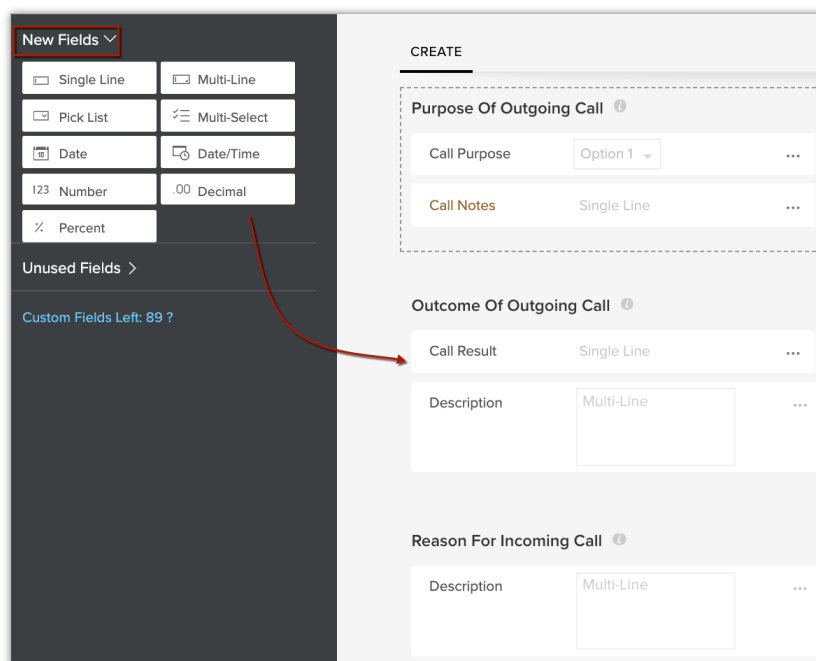
You can customize the layout by adding custom fields to the all the sections, except *Call Information*. The total number of custom fields that you can add are:

- String fields – 40  
(Includes single line, pick list, multi-select pick list, and multi line)  
Max limit for Multi line, pick list, and multi-select pick list - 10 each
- Number fields - 10
- Decimal and Percentage fields - 20
- Date fields – 10
- Date/time fields – 10

## To add custom fields

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1. Go to Setup > Modules and Fields > Calls.
2. Click the **Standard** layout.  
Alternately, hover over the *Standard* layout and click **More > Edit Layout** to add fields to the *Standard* layout.
3. From the *New Fields* tray on the left, drag and drop the required field types.



4. Name the field.
5. Click **Save**.

## Logging calls

You can log incoming calls, outgoing calls, scheduled calls, and missed calls. The type of call that is logged depends on the call start time. For example,

- If the **call start time** is in the **present**, then it is an outgoing call.

**Create Call**

**Call Information**

Call To: Lead ▾ Hanna Cheryl

Call Start Time: 08/07/2019 Now

Related To: Account ▾

Subject: Outgoing call to Hanna Cheryl

**Purpose Of Outgoing Call**

Call Purpose: Demo ▾

Call Notes: Ask the time, place and requirements

Buttons: Cancel, Call

- If the **call start time** is in the **past**, you can choose either **Inbound** or **Outbound** call type and specify the **duration**.

**Create Call**

**Call Information**

Call To: Lead ▾ Hanna Cheryl

Call Start Time: 07/07/2019 02:08 PM

Call Duration: 34 minutes 12 seconds

Call Type: Outbound ▾  
 ▾ Outbound  
 Inbound

Related To: Account ▾

Subject: Outgoing call to Hanna Cheryl

**Purpose Of Outgoing Call**

Call Purpose: Demo ▾

Call Notes: Ask the time, place and requirements

**Outcome Of Outgoing Call**

Call Result: Demo Scheduled

Description: Time :12:00 PM Date: 09-07-2019

Buttons: Cancel

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**Create Call**

**Call Information**

Call From: Lead ▾ Hanna Cheryl

Call Start Time: 07/07/2019 02:08 PM

Call Duration: 34 minutes 12 seconds

Call Type: Inbound ▾

Related To: Account ▾

Subject: Incoming call from Hanna Cheryl

**Reason For Incoming Call**

Description: Scheduling Demo and getting the pre-requisites.

Buttons: Cancel, Save

- If the call start time is on a later date, then you can schedule calls.

- Missed calls cannot be entered manually, they will be automatically captured from the telephony service that is integrated with Zoho CRM. While making an outgoing call via the telephony service, the **purpose of the call** should be specified.

## To log a call

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1. In the **Activities** module, click + **Call**.  
You can also associate a call to a lead or contact by clicking + **New Call** in the *Open Activities* related list in the record's details page.
2. In the *Create Call* page, do the following:
3. In **Call To**, specify the **Lead/Contact** name.
4. In **Call Start Time**, specify the date and time.  
According to the selected time the other sections related to outgoing, incoming, and scheduled call will be displayed.
5. Enter the **Call Duration** in minutes and seconds.  
Note, that this option will be available only for the outbound and inbound call

types.

Call Start Time	07/05/2019 12:04 PM
Call Duration	20 minutes 13 seconds
Call Type	Inbound ▾
Related To	

Outbound

✓ Inbound

6. Choose the **Call Type** from the drop-down list.
7. In **Related To**, select a module from the drop-down list.  
You can enter or search the record name.

Related To	Account ▾ Zylker	<input type="text"/>
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8. Enter the **Subject**.
9. Based on the call start time, enter details in the subsequent sections:
  - a. For an Inbound call, specify the Reason for the Incoming call.

Call Type	Inbound ▾
Related To	Account ▾ Zylker
Subject	Incoming call from Zylker
<b>Reason For Incoming Call</b>	
Description	Scheduling Demo and getting the pre-requisites.

- b. For an Outbound call, specify the Purpose and Outcome of the outgoing call.

Call Type	Outbound
Related To	Account - Zylker
Subject	Outgoing call to Zylker
<b>Purpose Of Outgoing Call</b>	
Call Purpose	Demo
Call Notes	Ask the time, place, and requirements.
<b>Outcome Of Outgoing Call</b>	
Call Result	Demo scheduled
Description	Time: 12:00 PM, Date: 09-07-2019.

- c. For a scheduled call, specify the Purpose of the Outgoing call.

Call Start Time	19/07/20 19	12:04 PM
Call Owner	Patrick Jane	
Related To	Account - Zylker	
Subject	Call scheduled with Zylker	
Reminder	None	
<b>Purpose Of Outgoing Call</b>		
Call Purpose	Demo	
Call Notes	Ask the time, place, and requirements.	

10. Click **Save**.

# Configuring Workflow Rules for Calls

By configuring workflow rules for calls, you can automate recurring actions such as sending emails, updating fields or assign task, when specific conditions pertaining to a particular call are met. Rules can be made for incoming, outgoing, scheduled, missed, and deleted calls.

Often the reps run into a risk of irking their customers or getting issues escalated to the superiors if the calls are missed or rescheduled without prior notice. Issues like these can be handled easily by defining appropriate actions when specific conditions are met. Like, if a rep receives a missed call, immediately another user must be notified to contact the customer.

## Feature Availability

Available in the **Enterprise** and **Ultimate Editions**

**Limits** – 50 rules per module.

Configuring workflow rule consists of the following steps:

**Basic Details** - Enter the Rule Name and the Description.

**Rule Trigger** - Specify the rules based on the type of call.

- **Incoming call** - Set Triggers for an incoming call.
- **Outgoing call** - Set Triggers for outgoing calls.
- **Scheduled call** - Triggers for scheduled calls, when a call is:
  - Created/Edited
  - Overdue
  - Rescheduled
  - Reassigned
  - Cancelled
- **Deleted call** - Set triggered when a call log is deleted.
- **Any of the above** - Set rules irrespective of the type of call.

**Workflow Conditions** - The conditions can be set based on:

- Call Fields (Call Duration, Call Purpose, Call Result, etc.)
- Caller (Leads, Contacts, Accounts, or Unknown).

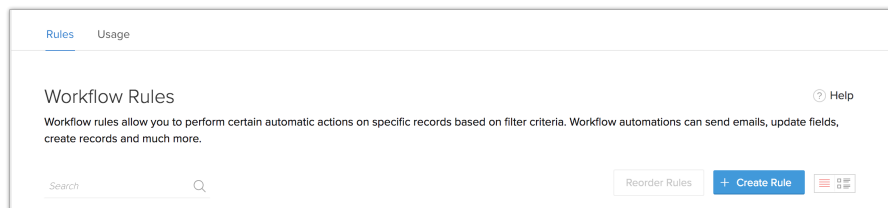
**Instant Actions** - Specify actions like sending email

notifications, assigning tasks, updating fields creating webhooks, and functions which will be executed when the workflow rule is triggered.

## To configure workflow rules

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1. Go to Setup > Automation > Workflow Rule.
2. In the *Workflow Rules* page click + **Create Rule**.



3. In *Create New Rule* page, select Calls from the drop-down list.
4. Specify the **Rule Name** and **Description**.

### Create New Rule

Module	Calls ▾
Rule Name	Actions for Incoming Calls
Description	Perform actions when an incoming call is received.

Next
Cancel

5. Click **Next**.

6. Select when you want to execute the rule.

When do you want to execute this rule?

- Incoming call
- Outgoing call
- Missed call
- Scheduled call
- Deleted call
- Any of the above

When do you want to execute this rule?

- Incoming call
- Outgoing call
- Missed call
- Scheduled call is created or edited
- Deleted call
- Any of the above

created or edited  
overdue  
rescheduled  
reassigned  
cancelled

Next

7. Click **Next**.

8. Check **Yes**, if you want to set conditions for call properties.

9. Specify the conditions based on which workflow will be triggered.

You can apply the rule to all modules, or selected module, or records in a module which matches the specified conditions.

Would you like to set conditions for call fields?

- Yes
- No

Apply this rule to calls matching all of these conditions

all  
any

Call logged ma...  
Call Purpose is Demo x

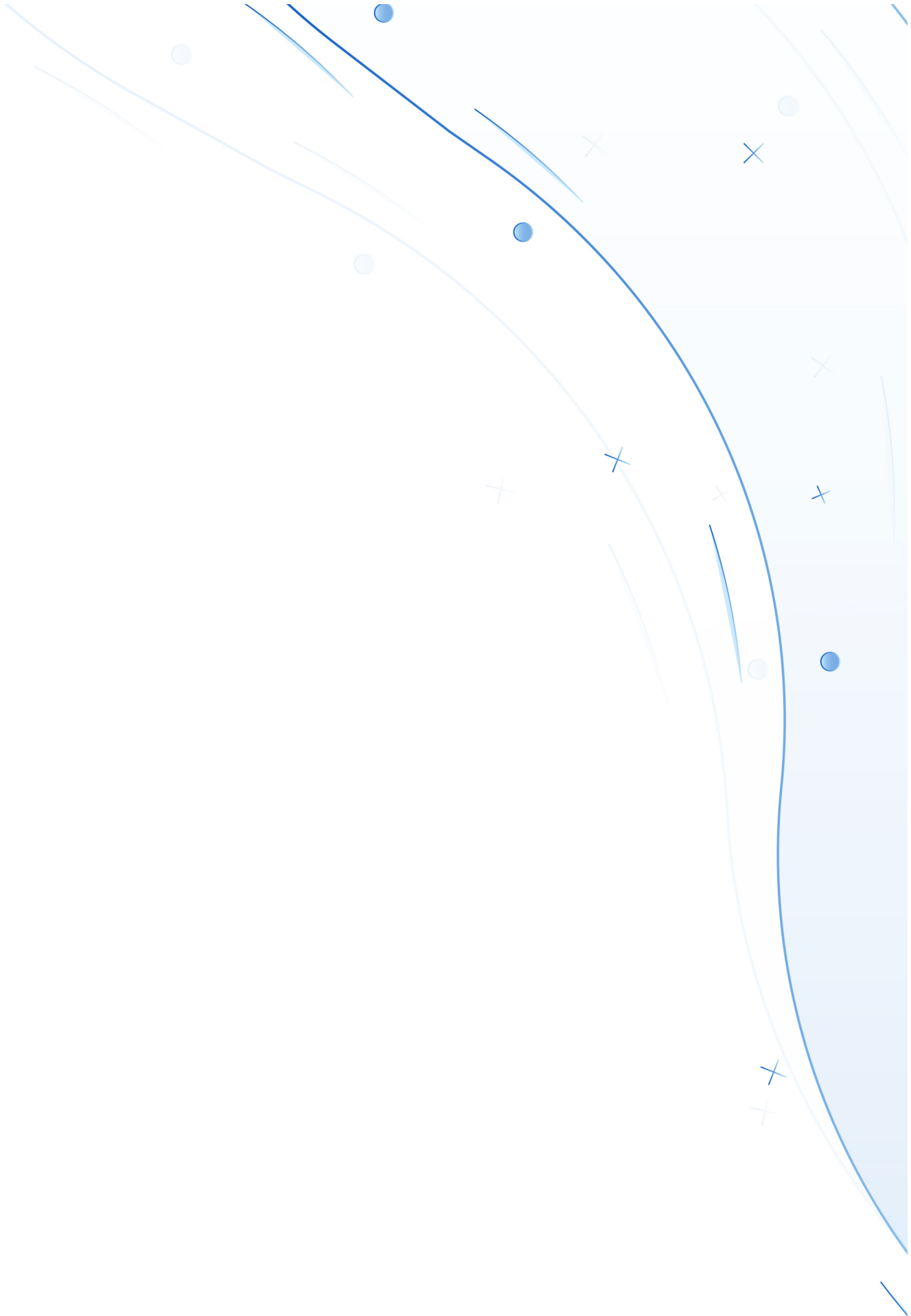
Apply this rule to All

Next

10. Click **Next**.

11. Click **Instant Action** and select an action from the drop-down list.

12. Click **Associate and Save**.



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