Working with Calls

ZOHO CRM

READ ME

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.

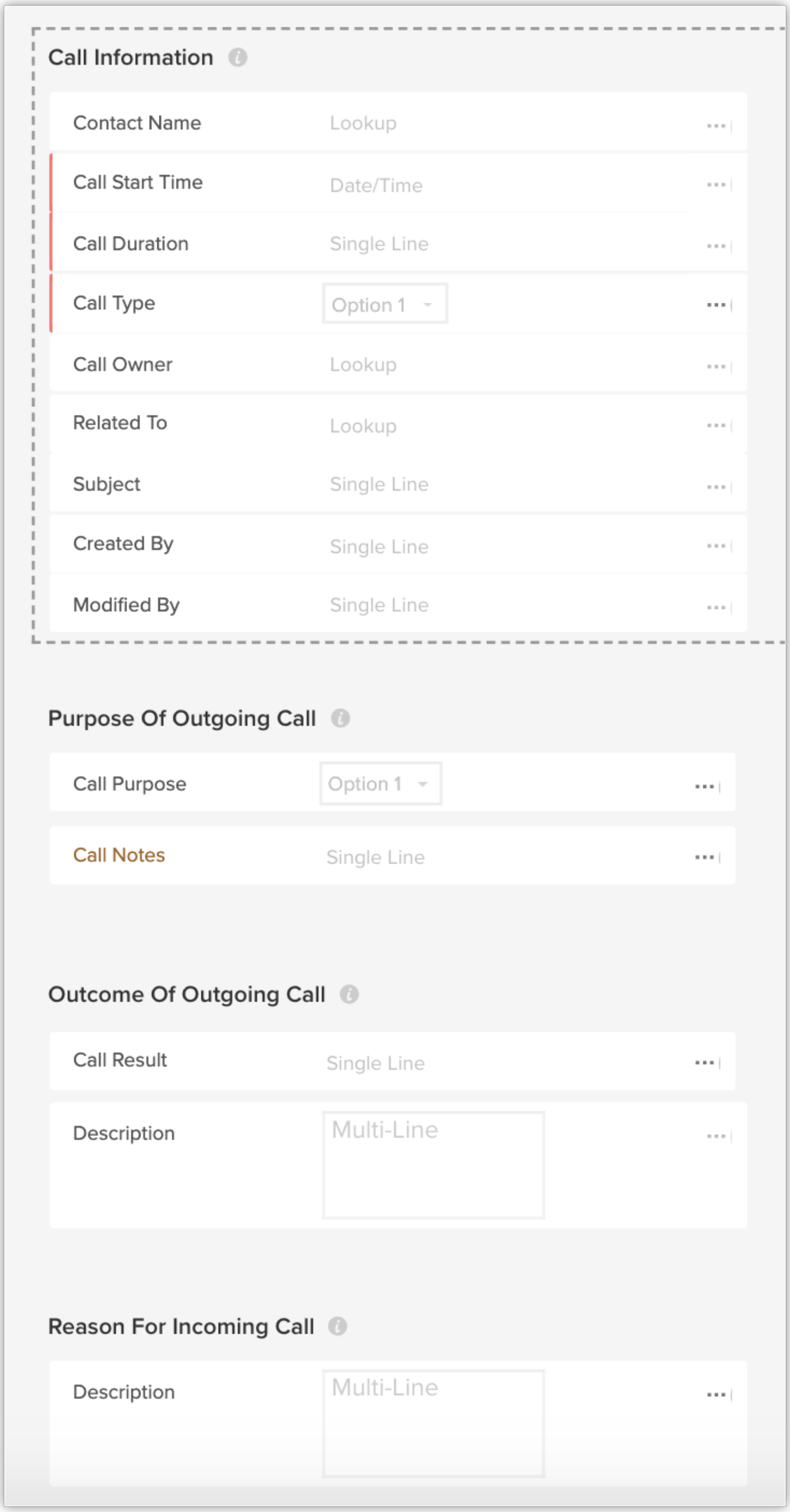
The Calls layout in the Activities module gives the right platform to store and track every detail related to a call. The sales reps can enter call details like duration, date and time of calls, notes, etc.

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



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

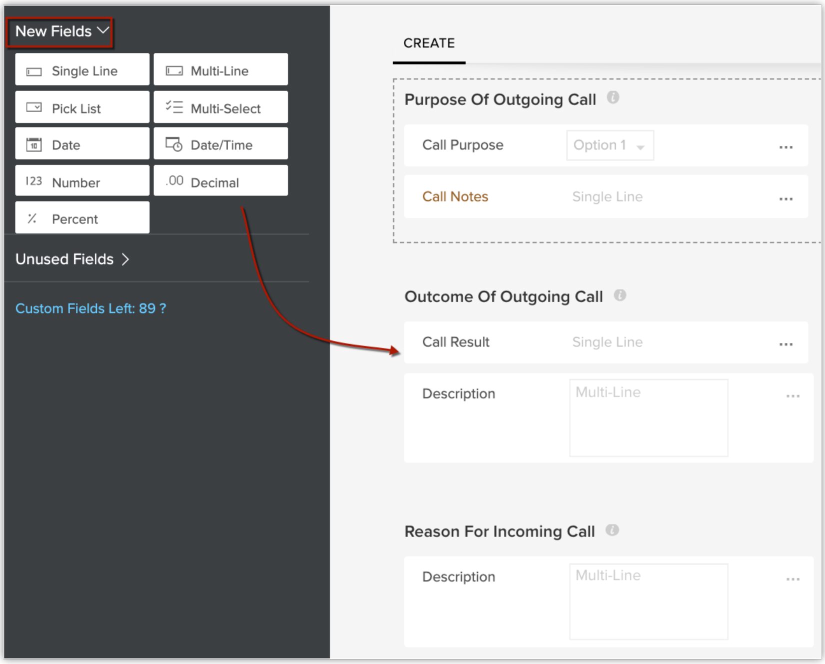
  (Includes single line, pick list, multi-select pick list, and multi line)

  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

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.

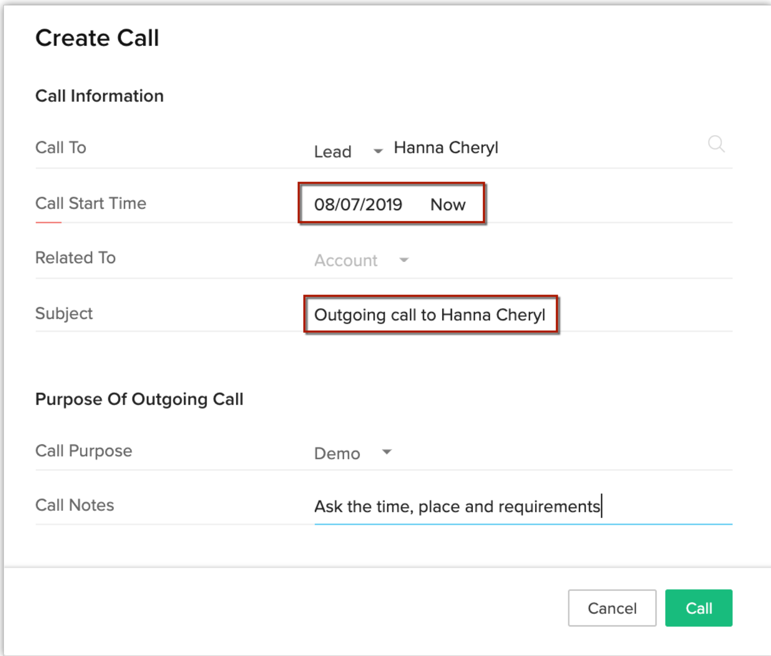


4. Name the field.
5. Click **Save**.

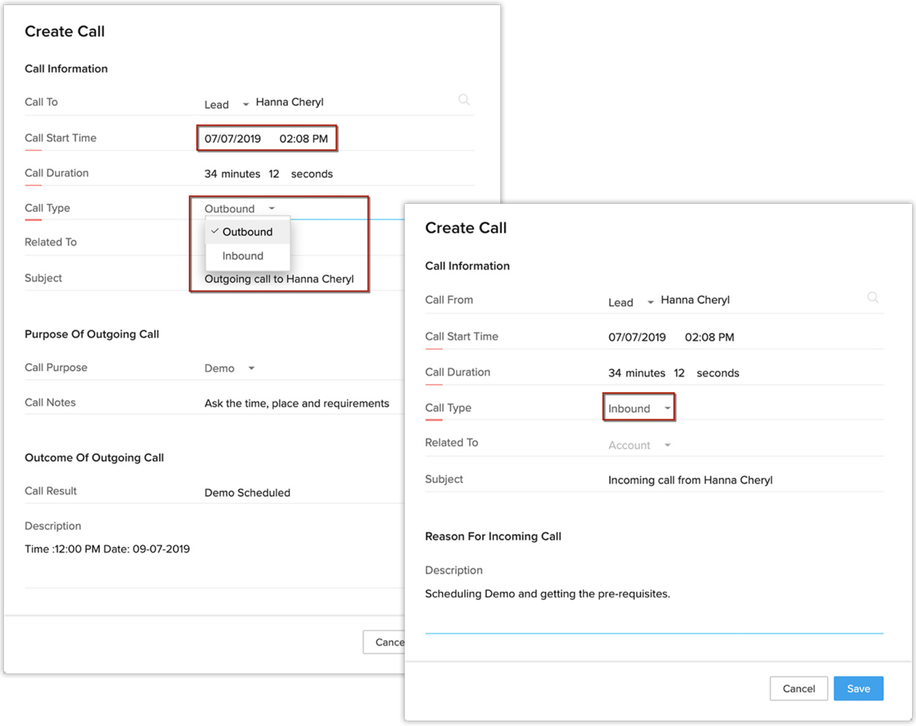
Logging calls

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,

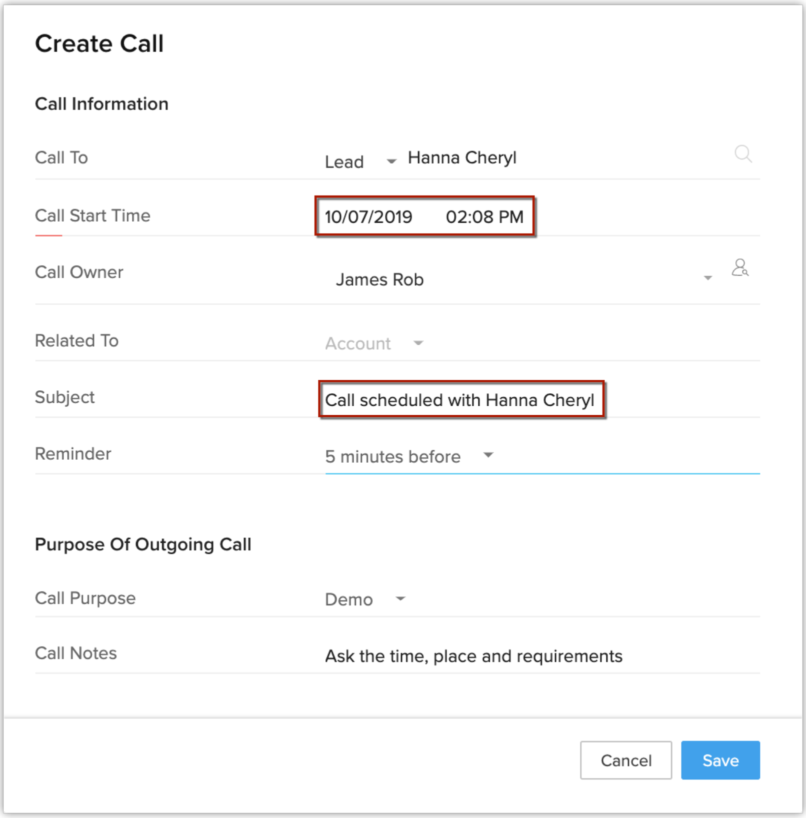
- If the **call start time** is in the **present**, then it is an outgoing call.



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



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

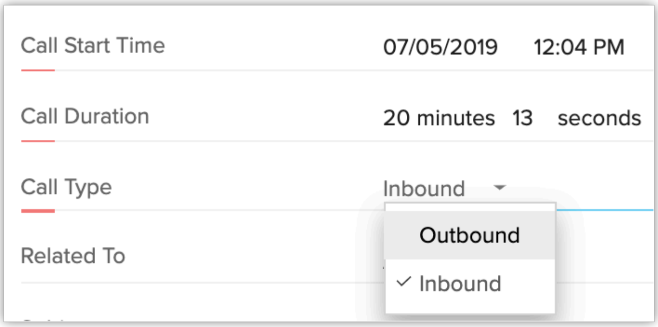


- Missed calls cannot be entered manually, they will be automatically captured from the telephony service that is integrated with Zoho CRM. While making an outgoing call via the telephony service, the **purpose of the call** should be specified.

To log a call

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

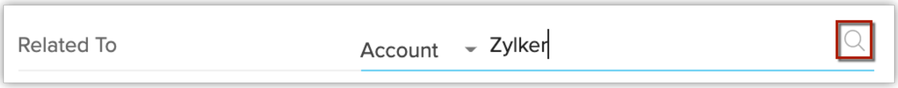
types.



6. Choose the **Call Type** from the drop-down list.

7. In **Related To**, select a module from the drop-down list.

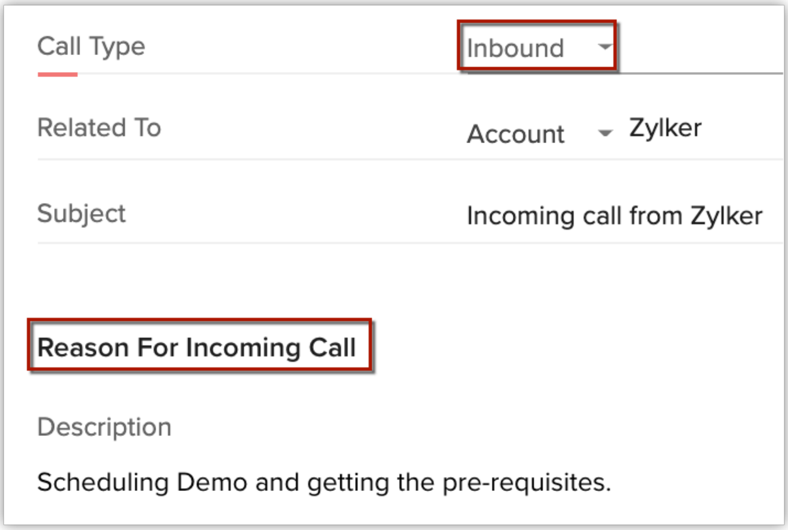
   You can enter or search the record name.



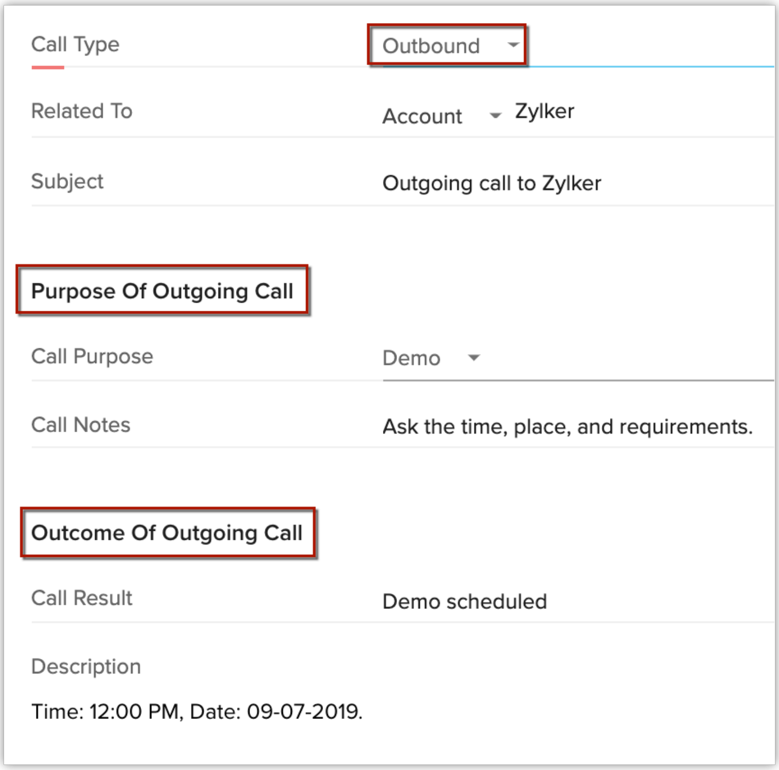
8. Enter the **Subject**.

9. Based on the call start time, enter details in the subsequent sections:

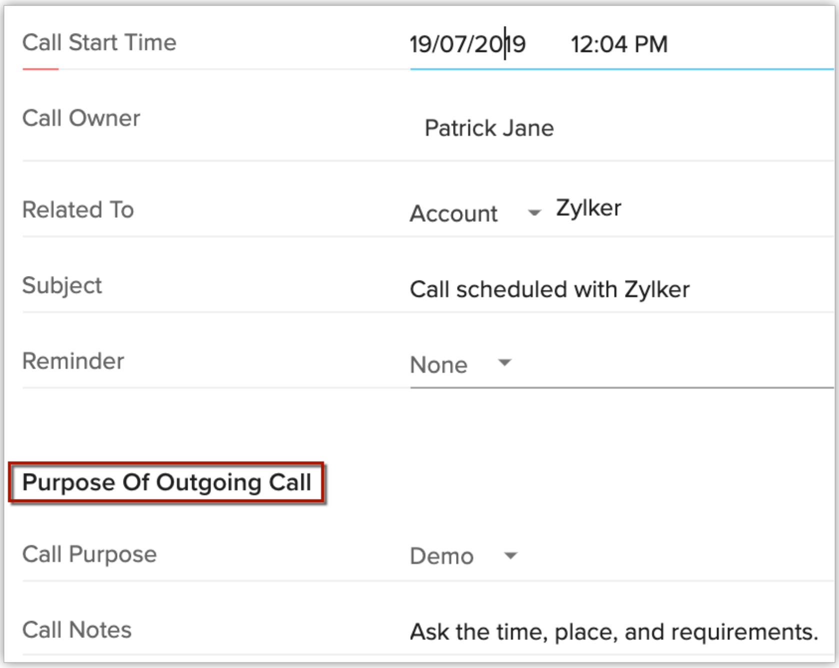
   a. For an Inbound call, specify the Reason for the Incoming call.



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



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



10. Click **Save**.

Configuring Workflow Rules for Calls

By configuring workflow rules for calls, you canautomate 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 Tiggers 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 t**riggered when a call log is deleted.
- **Any of the above -** Set rules irrespective of the type of call.

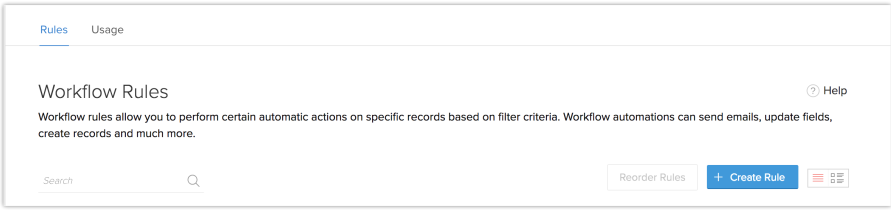
Workflow Conditions - The conditions can be set based on:

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

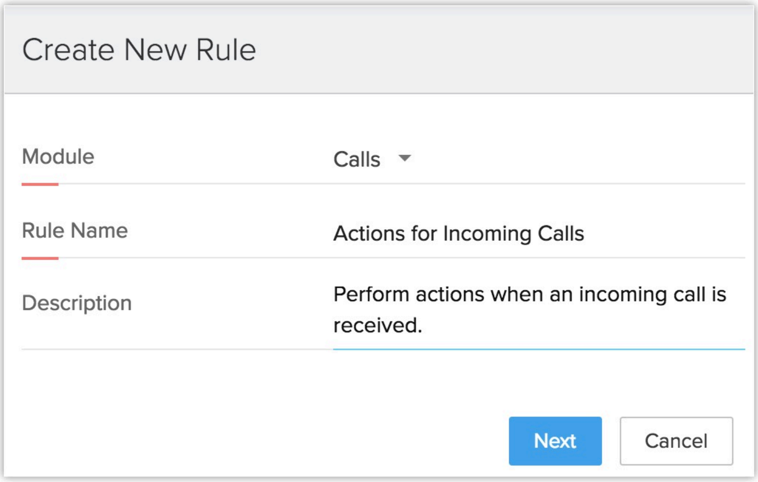
Instant Actions - Specify actions like sending email notifications, assigning tasks, updating fields creating webhooks, and functions which will be executed when the workflow rule is triggered.

To configure workflow rules

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

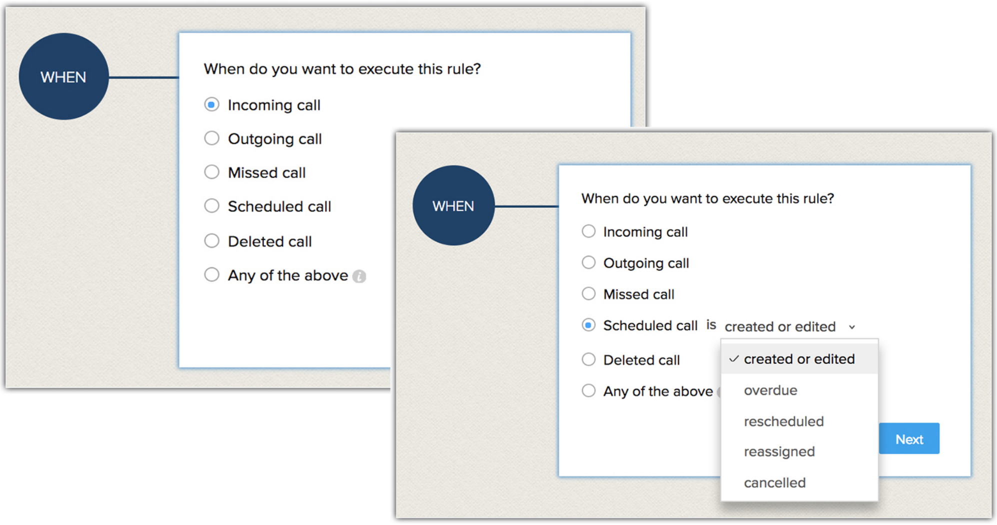


3. In *Create New Rule* page, select Calls from the drop-down list.
4. Specify the **Rule Name** and **Description**.



5. Click **Next**.

6. Select when you want to execute the rule.

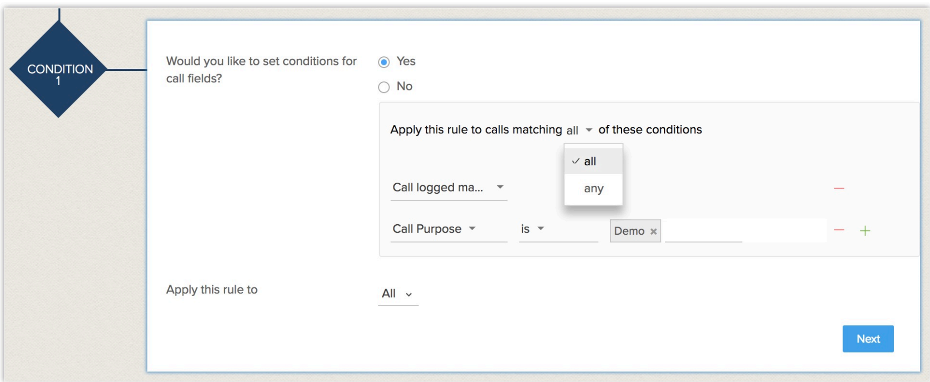


7. Click **Next**.

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.



10. Click **Next**.

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

12. Click **Associate and Save**.