

## **Deluge Integration: Create a Workflow Rule**

Deluge integration with Zoho Voice is used to extend the integration scope of the telephony capabilities beyond Zoho applications catering to accommodate a wider business requirement. However, **to be precise with the data set that is posted/called for a trigger event**, you have to create a rule specific to your business need.

**Rules** are where the trigger type for a service connection is defined. A call or SMS event that sets off a service connection is configured in the workflow rule. Conditions that narrow down the reports from a broader data set are also defined here, and these conditions are associated with functions to map the criteria.

## How to create a workflow rule for handling precise data?

- 1. In **Zoho Voice** console, navigate to **Settings** in the left pane menu and click **Workflow**.
- 2. In the **Rules** tab, click **New Rule** button to create a new rule.
- 3. Under the *Workflow Setup* section, provide the **Workflow Rule Name** and **Module** type (Call/SMS) for which you want the workflow to be triggered.

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Dashboard	Settings	Rules > New Rule									Page tips?			
<b>(•))</b> Live Calls	My Profile	1. Workflow Setup Enter the name and module for your workflow WORKFLOW BULE NAME*												
<b>4</b> Logs	Deskphone Business Hours / Holidays	MODULE*	Enter the workflow name Call	~										
Ę	Audio Files		Rule will be triggered when a Call log action is performed	d.										
Messages	Call Recording Profile	2. Setup Conditions Setup the conditions for which you want to perform the action												
C Users	Queue Audio Profile Config	+ Add Condtions												
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Contacts	Credit History													
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		Save Cancel									6			

- 4. The *Setup Conditions* section is where the filters for the drill-down data are configured. Click **Add Functions** button to define the condition for the rule.
- 5. Provide a relevant **Condition Name**.
- 6. Filters are defined in Setup Criteria section. Based on the module type selected, the criteria parameters vary.
  For every criteria, you can choose a relevant comparator and values that match your business requirement.
  Match Level in each Criteria Group can be selected as ALL or ANY based on your requirement. <u>Refer to</u> this page to know more about the criteria.

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ጽ	Call Branding		AND	Agents ~		Select Comparator	~	Select Agents ~	+ ×	¢			
Queues	Documents	+ Add Group											
ି	Blocked Numbers	3. ASSIGN FUNCTION(5)* O											
Integration	Zoho Telephony	Note : Only the functions matching the module type of the workflow rules are displayed.											
Contacts	Credit History	A maximum of 5 functions can be assigned $\checkmark$ + Add function											
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7. Once criteria is defined, you can map functions to the rule under Assign Function(s) section.Note: Only the functions matching the module type of the workflow rules are displayed under this field. You

can assign a maximum of up to 5 functions to a rule.

8. After assigning, click **Save** to create the rule.