

Zoho CRM

The integration with Zoho CRM will allow you to initiate an instant or scheduled remote assistance session from the Contacts or Leads module in Zoho CRM. During a session, you will be able to guide your customer's sales queries or provide necessary instructions by viewing the live camera stream and using our whole host of annotation tools.

How to enable Zoho Lens for CRM?

- 1. Log in to your Zoho CRM account.
- 2. Select the Settings option from the top-left corner of the screen.
- 3. Navigate to the Marketplace category and choose Zoho.

C Search										
GENERAL	USERS AND CONTROL	ZOHO DIRECTORY	CHANNELS	CUSTOMIZATION						
Personal Settings	Users	Single Sign-On(SAML)	Email	Modules and Fields						
Company Details	Security Control	Security Policies	Telephony	Wizards						
Calendar Booking	Compliance Settings	Active Directory Sync	Social	Pipelines						
Gamescope	Territory Management	Login History	Chat	Templates						
			Signals	Customize Home page						
AUTOMATION	PROCESS MANAGEMENT	DATA ADMINISTRATION	MARKETPLACE	DEVELOPER SPACE						
Workflow Rules	Blueprint	Import	All	Zia Voice						
Schedules	Approval Processes	Export	Zoho	APIs						
Actions	Review Processes	Data Backup	Google	Connections						
Assignment Rules	CommandCenter	Remove sample data	Microsoft	Functions						
Case Escalation Rules		Storage		Widgets						
				Zoho CRM Variables						

- 4. Under the list of extensions available below Zoho, find Zoho Lens and click the Setup Now button.
- 5. Agree to all the terms and conditions by enabling the checkbox next to the I have agreed to the Terms of Service option.
- **6.** Also, authorize extension to get access to your data by checking the box available near the I authorize Zoho Lens for CRM to access and process my data as required option.

7. Click the Continue to Install button.

2011 Marketplace		
	Zoho Lens for CRM	
	CRM Extension with Zoho Lens	
	Continue as Malcolm(malolm.h@zylker.com)or Login as a different user.	
	Name : Zoho Lens for CRM	
	Version : 20	
	✓ I have agreed to the Terms of Service	
	I authorize Zoho Lens for CRM to access and process my data as required.	
	Continue to Install	

8. In the next step, choose the Users/Profiles for which you want to enable the extension for and click Confirm.

Dono Marketplace		
	CRM Extension with Zoho Lens	×
	Choose Users/ Profiles Install for admins only Install for all users Choose profiles Confirm	
	Zoho Home Contact Security IPR Complaints Anti Spam Policy Terms of Service Privacy Policy ©2014, Zoho Corporation Pvt. Ltd. All Rights Reserved. Zoho	GDPR

9. Click the Authorize button if you have an existing Zoho Lens account.

Setup Admin Panel CRM	SalesIQ Desk Projects	a Campaigns Social Survey	Analytics		×
Setup	All Extensions Instal	Zoho Lens for CRM Extension with:	CRM Zoho Lens	×	
General	Extension Deta	Authorize the following Integration	is to activate your extension.	Uninstali Get Support	
 Users and Control 	Name	CRM Extension - Zoho Lens			
Zoho Directory	Version	New to Zoho Lens ? Signup Or	Already have an account with Zoho Lens ? Authorize		
Channels	Installed by				
 Customization 	Installed date			Skip	
Automation	Short description		-		
Process Management	Status	Active			
Data Administration	Permission	Change Permission			
Marketplace					
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	→ Leads (+)		Module		
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	Connected App 🕀				
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10. Click the Accept button to allow Zoho Lens for CRM to access all data related to your Zoho Lens account.

	lens
ZOHO	
Lens	
Lens would like to access the following information.	
ZohoLens	
 Find with group ate of 2 control terms To read Personal settings value Manage Your Remote Support sessions Allow all operations on installed integration application details 	
By clicking the "Accept" button you allow Lens to access data in your Zoho account.	
Accept Reject	
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Succe, 2010 Corporation PVI. Ltd. All Hights Reserved.	

11. Click Finish. The Zoho Lens for CRM extension has now been installed successfully.

Setup Admin Panel CRM	SalesIQ Desk Project	s Campaigns Social Survey Analytics		×					
Setup	All Extensions Install	Zoho Lens for CRM CRM Extension with Zoho Lens	×						
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 Users and Control 	Name	CRM Extension - Zoho Lens							
Zoho Directory	Version	Revoke access to Zoho Lens data.							
Channels	Installed by								
Customization	Installed date		Finish						
 Automation 	Short description								
Process Management	Status	Active							
 Data Administration 	Permission	Change Permission							
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How to start a session from CRM?

- 1. Go to Zoho CRM.
- 2. Log in to CRM using your credentials.
- 3. To start a session for any lead or contact, navigate to the Leads or Contacts module.



4. Select a lead or contact, then click the Live Camera Assistance option in the top-right corner.



5. Choose the default department from which you would like to start the Lens session in the proceeding window.

6. Click the Start Now button to initiate a session instantly.

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7. To schedule a session, select the Schedule option and specify the necessary information.

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☆	Zoho Projects	Phone 555-555-5555			Title	Information Syst	tems Manager		-
Favorites	Charts Charnels Contacts Here is your Smart Chat (Ctrl+Space)					Ask Zia	24 🖹 🛓	© ©

- 8. You can also create a session by navigating to the Live Camera Assistance tab. Select the Create Live Camera Assistance option in the top-right corner, key in the required details.
- 9. To add a contact or lead after a session is scheduled, go to the Contact or Lead module. Choose a contact or lead of your choice.
- 10. Click the Assign option under the Live Camera Assistance section to add that contact or lead successfully.

11. You can also select the New option in the Live Camera Assistance section, then fill in the required details to create a session for any lead or contact when required.

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