



ORAI Robotics Chatbot Integration for Zoho CRM

Zoho CRM Extension

**Help Document
Version 1.0**

**Prepared By
ORAI Robotics**

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ORAI Robotics Chatbot Integration– Zoho CRM Extension: User Manual

1. Overview

ORAI is a Global Conversational AI Platform to build 1:1 instant conversation with customers over text, Voice, and Messenger apps. ORAI is a result of highly experienced and driven experts who understand AI, ML, Design Thinking, and Robotics. ORAI's Conversational AI "Oshi" is a virtual assistant created with state-of-the-art technology to be indispensable, sustainable, and scalable in the global customer outreach, conversion, and retention market. Zoho CRM Extension for ORAI Robotics Chatbot is developed by Dhruvsoft, a Zoho Authorized Partner, and available in Zoho Marketplace for all Zoho users to deploy as an extension for Zoho CRM.

Using this extension, Zoho CRM users can easily synchronize the data from ORAI to Zoho CRM unidirectional. ORAI Leads will be added as Leads into the Zoho CRM account.

This User Manual document provides step-by-step instructions to install this extension from Zoho Marketplace, how to configure and use the integration functionality within your Zoho CRM account.


1.1. Install the ORAI Robotics Chatbot Extension

Go to Zoho Marketplace and search for "ORAI Robotics Chatbot Integration for Zoho CRM" to locate the extension and install it directly from the Marketplace. Alternatively, you can install the ORAI Robotics Chatbot Integration by logging in to your Zoho CRM account and follow the installation instructions below.

To install the OARI Robotics Chatbot Integration Extension from Zoho CRM:

- ❖ Go to **Setup > Marketplace > All**. By default, all the Zoho Extensions currently installed within your Zoho CRM account are listed. Go to the "All Extensions" tab to view all available Extensions.
- ❖ Click **All Extensions**, browse/search for **ORAI Robotics Chatbot for Zoho CRM**, locate and then click Extension. The details about the Extension will be shown as per the screenshot below.
- ❖ Click the Install button.
- ❖ Make sure you check the "Agree to the **Terms of Service**" checkbox and click **Install**.
- ❖ Read the Privacy Declaration and Click **Agree and Continue**.

All Extensions **Installed** Updates



ORAI Robotics Chatbot Extension for Zoho CRM

ORAI Robotics is a third party application we need to connect with Zoho CRM and integrate with chatbot communication in Leads/Contacts Module.

Do you want to install the extension shared by sujit@orai-robotics.com?

Extension Details


Name	: ORAI Robotics Chatbot Extension for Zoho CRM
Version	: 27

- I have agreed to the [Terms of Service](#).
- I authorize ORAI Robotics Chatbot Extension for Zoho CRM to access and process my data as required.

[Continue](#)

❖ Select the users/profiles for which the extension needs to be installed and click **“Confirm.”**

All Extensions **Installed** Updates



ORAI Robotics Chatbot Extension for Zoho CRM

ORAI Robotics is a third party application we need to connect with Zoho CRM and integrate with chatbot communication in Leads/Contacts Module.

Choose Users/ Profiles

<input type="radio"/> Install for admins only
<input checked="" type="radio"/> Install for all users
<input type="radio"/> Choose profiles

[< Back](#) [Confirm](#)

1.2. Finding Your ORAI Robotics Chatbot Credentials

To activate ORAI Robotics Chabot Integration for Zoho CRM. The below mentioned credentials are mandatory. This section explains each of the credential information that must be entered while installing the extension as shown below.

For ORAI - K:

1. Phone Number
2. API Key
3. SID

For ORAI - D:

1. API Key
2. Names Space

For ORAI Configuration:

1. Bot Key
2. LapAccountID

1.3. Uninstall the ORAI Robotics Chatbot Extension for Zoho CRM

Uninstalling this extension from the Zoho CRM will delete all its associated data. To uninstall ORAI Robotics Chatbot Extension, please follow the below steps:

- ❖ Go to **Setup > Marketplace > All > Installed tab**.
All the installed Extensions will be listed.
- ❖ Browse for **ORAI Robotics Chatbot** and click on the **Uninstall** link.
- ❖ Click **Okay** to confirm in the confirmation pop-up that follows. The Extension will be uninstalled.

2. Settings – ORAI Service Provider Configuration

After installing the extension in Zoho CRM, the ORAI Service Provider Configuration. There are two service providers

- (a) ORAI – D
- (b) ORAI – K

If you choose ORAI – D then you must fill some mandatory fields to start the conversation

- ❖ Service Provider : ORAI – D
- ❖ API KEY : <Provide your valid API KEY>
- ❖ Name Space : <Provide your valid Namespace>
- ❖ LAP Account ID : <Provide your valid LAP Account ID>
- ❖ Bot Key : <Provide your valid Bot Key>

All Extensions **Installed** Updates

← ORAI Robotics Chatbot Extension for Zoho CRM - Settings

ORAI Service Provider

Service Provider *

ORAI-D

API KEY

Please enter your API Key

Name Space

Please enter your Name Space

LAP Account ID

Please enter your Lap Account ID

Bot Key

Please enter your Bot Key

SAVE/SUBMIT

If you choose ORAI – K then you must fill some mandatory fields to start the conversation

- ❖ Service Provider : ORAI – K
- ❖ Phone Number : <Provide your valid Phone Number>
- ❖ API KEY : <Provide your valid API KEY>
- ❖ SID : <Provide your valid SID>
- ❖ LAP Account ID : <Provide your valid LAP Account ID>
- ❖ Bot Key : <Provide your valid Bot Key>

All Extensions **Installed** Updates

← ORAI Robotics Chatbot Extension for Zoho CRM - Settings

ORAI Service Provider

Service Provider *

ORAI-K

Phone Number

Please enter your phone number

API KEY

Please enter your API Key

SID

Please enter your SID

LAP Account ID

Please enter your Lap Account ID

Bot Key

Please enter your Bot Key

SAVE/SUBMIT

3. Push Leads from ORAI

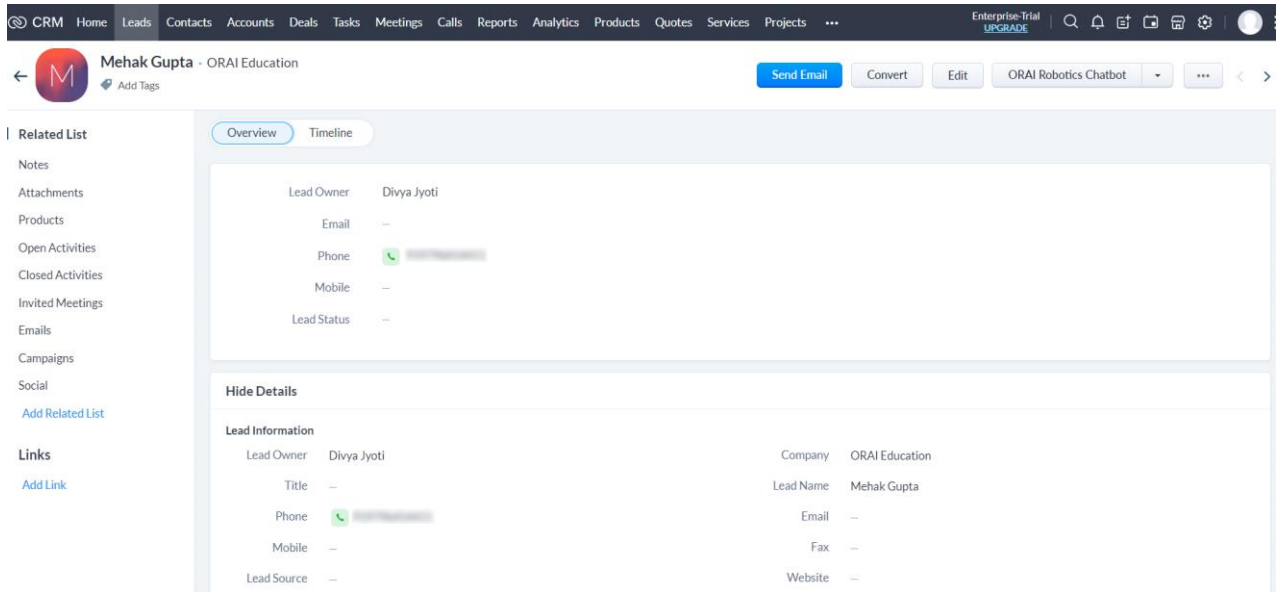
After installing the extension in Zoho CRM, the ORAI Leads will be synchronized to the Zoho CRM account. The data are synchronized Unidirectional (ORAI → Zoho CRM).

After initial data synchronization, any data changes in Leads from ORAI, Lead will be updated or created in Zoho CRM instantaneously (Real-time sync).

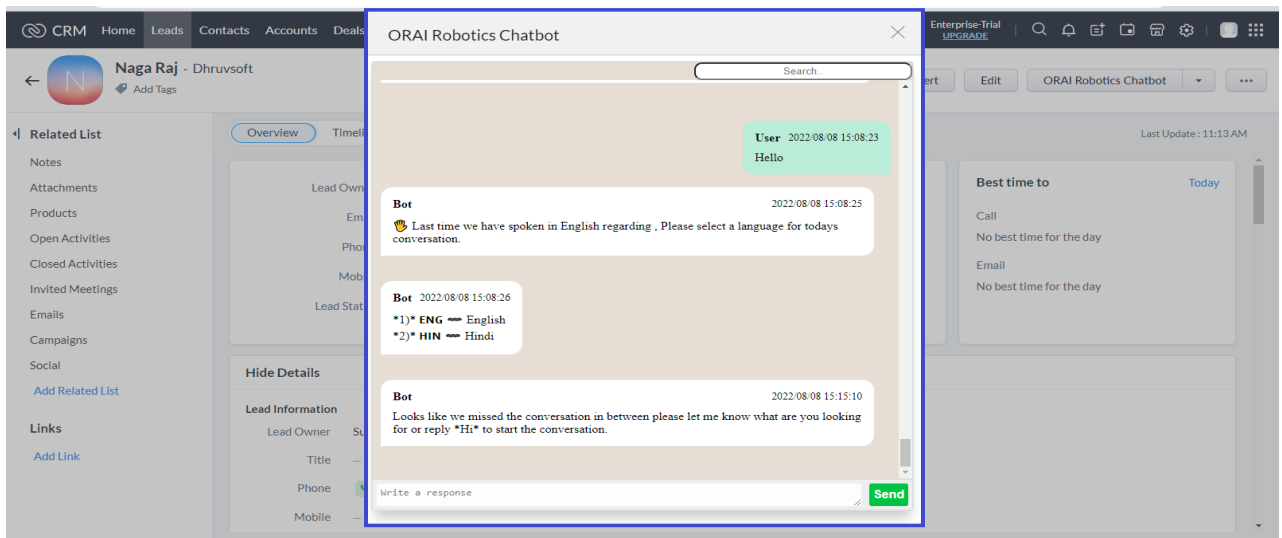
3.1. Sync Leads from ORAI to Zoho CRM

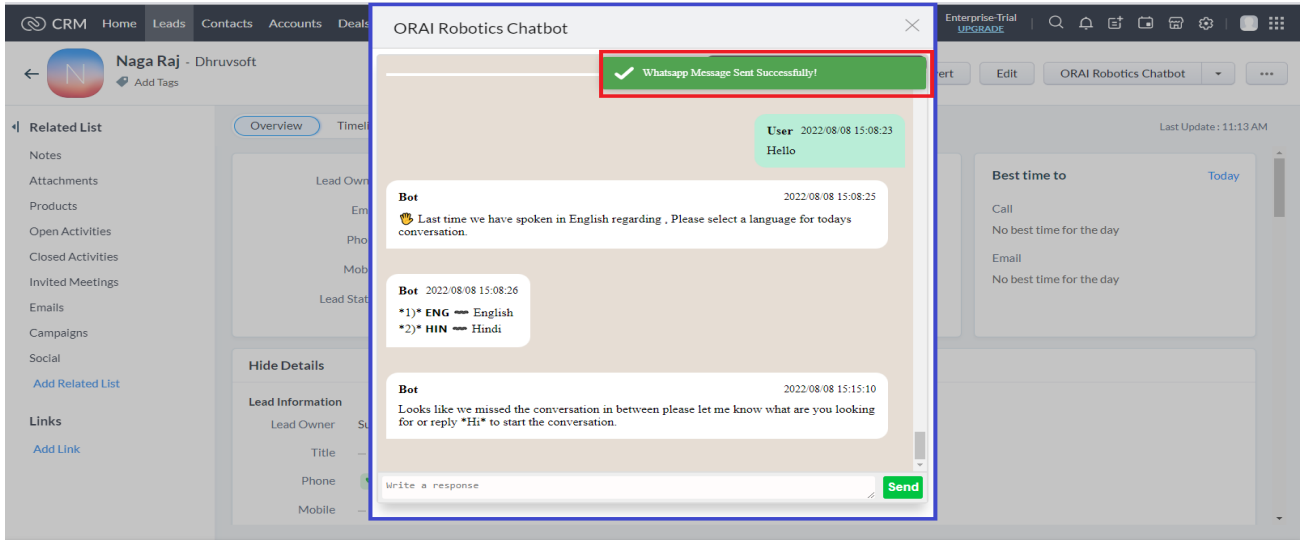
After the successful installation of the ORAI Chatbot Extension, the following fields are mapped in the Leads module of Zoho CRM.

- ❖ **First Name** : Text Field
- ❖ **Last Name** : Text Field
- ❖ **Company** : Text Field
- ❖ **Phone** : Number Field



The Leads data from the ORAI will be created/updated as Leads in the Zoho CRM Leads module.



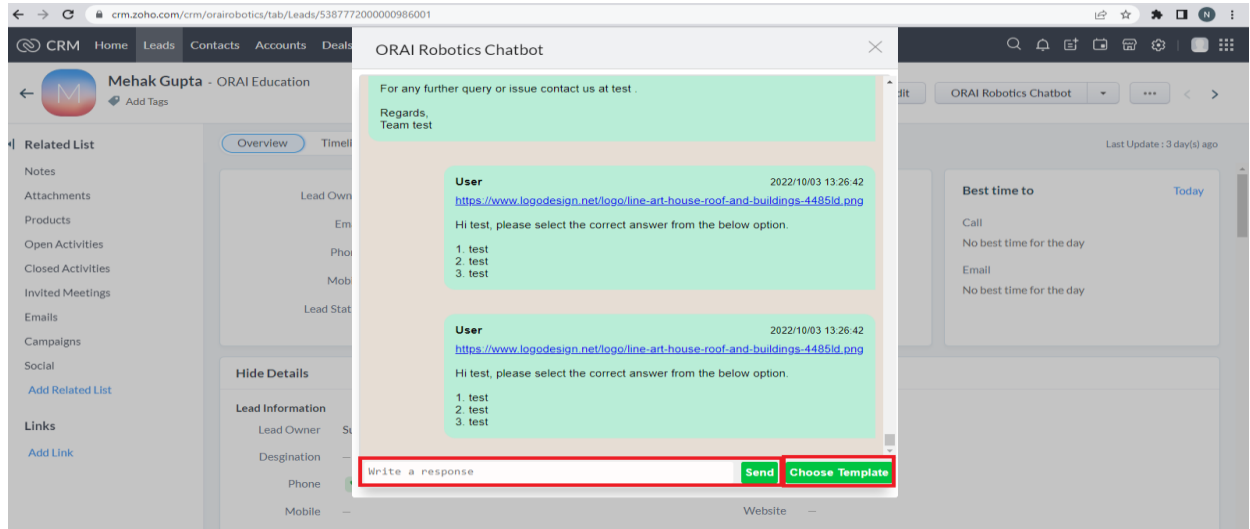


4. Chatbot History

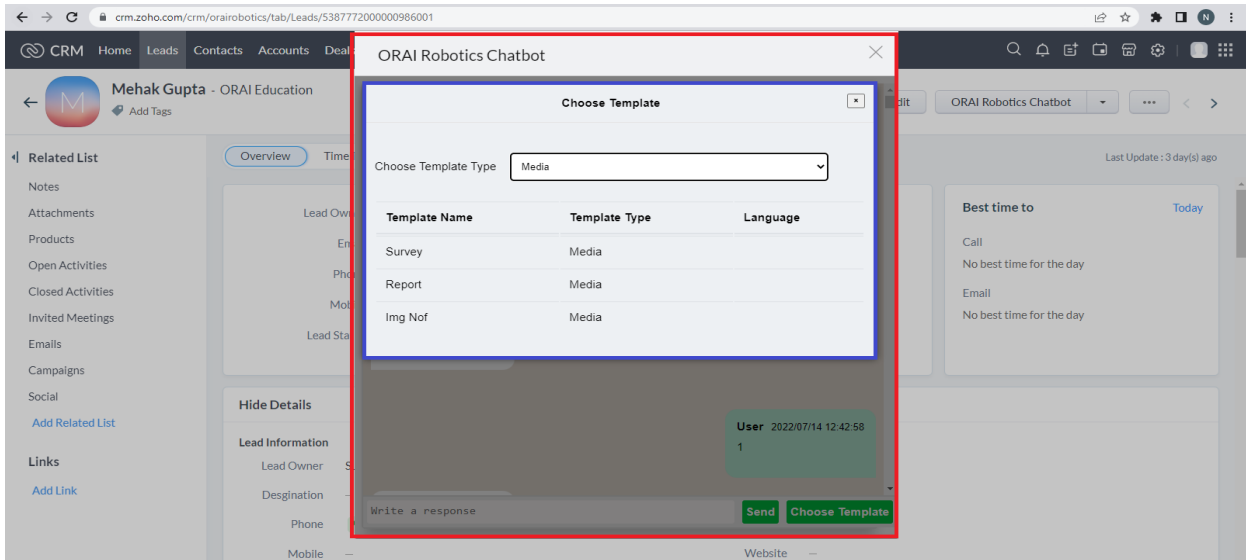
ORAI Robotics Chatbot is a widget (UI) that will fetch the conversation response from the ORAI by using a phone number and displaying itself. And we are sending WhatsApp messages by entering the text message in the text field or choosing the template option to send the message.

Once you click the “Send” button the message will be received in WhatsApp.

For fetching & storing the conversation history by using the API that will be given by the ORAI.

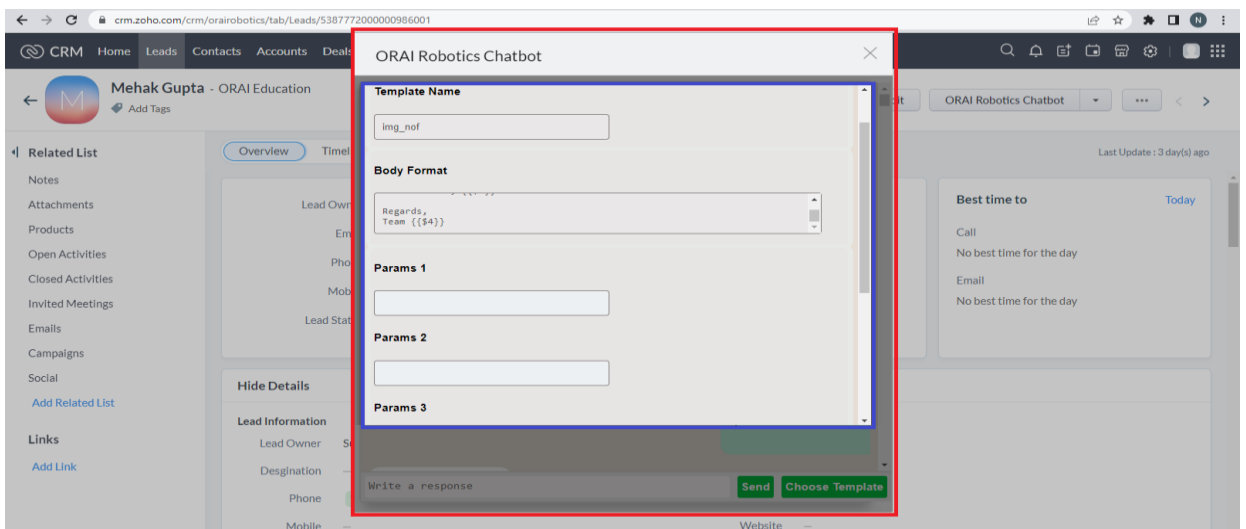


For a Text message is sent within 24 hours, write the message in the field, and click the “Send” button to send the message.



For a Template message is sent 24 hours is crossed from the last conversation chat. The popup screen is enabled from the chat window and selects the template option to click and enter the required parameters to send the message.

Choose the template button option is available if its client wants to send the message before or after 24 hours crossed the click the button to choose the one of the options from the template list and type required parameters to send the message



5. Send Bulk WhatsApp Message

“ORAI - Send WhatsApp” this button is available from the lead list page, Once clicking the checkbox option select the multiple leads (one or more). The button will be displayed at the top of the center page. Clicking the “ORAI - Send WhatsApp” button to open the UI.

CRM Home Leads Contacts Accounts Deals Tasks Meetings Calls Reports Analytics Products Quotes Projects

9 Records Selected. Clear Run Macro Send Email Create Task Tags ORAI-Send WhatsApp Actions 1 to 9

Canvas View: Leads - Canvas Sort By Fit to Screen

Filter Leads by

Untouched Records By: User & System in the last 2 weeks

System Defined Filters

- Touched Records
- Record Action
- Related Records Action
- Latest Email Status
- Activities
- Notes
- Campaigns

Filter By Fields

- City
- Company

Apply Filter Clear

Total Count: 9 30 Records Per Page 1 to 9

Lead Name	Company	Lead Source	Last Contacted
Priya R	ORAI Education	---	Nov 18, 2022 01:40 PM
Miller Edward	ORAI Education	---	Nov 3, 2022 01:06 PM
Sowmya Test	ORAI Education	---	Nov 2, 2022 03:12 PM
Mehak Gupta	ORAI Robotics	---	Nov 2, 2022 04:42 PM
Test2	Orai-Robotics	Home Page	Oct 11, 2022 11:20 AM
test	---	---	Nov 11, 2022 11:06 AM

The widgets are showing like choose the template type. Selection of template type based on the template option is displayed on the screen. Selection of template to enter the required parameters to send the bulk messages for every leads.

CRM Home Leads Contacts Accounts Deals

4 Records Selected. Clear Run Macro Send Email

Canvas View

Filter Leads by

Untouched Records By: User & System in the last 2 days

System Defined Filters

- Touched Records
- Record Action
- Related Records Action
- Latest Email Status
- Activities
- Notes
- Campaigns

Filter By Fields

- City

ORAI-Send WhatsApp

Choose Template Type: Media

Template Name	Template Type	Language
Survey	Media	
Report	Media	
Img Nof	Media	

Sort By Fit to Screen

Sujit Das Biswas Sep 30, 2022 11:57 AM

Sujit Das Biswas Sep 30, 2022 11:49 AM

Sujit Das Biswas Sep 29, 2022 01:10 PM

Sujit Das Biswas Sep 29, 2022 12:35 PM

Sujit Das Biswas Sep 29, 2022 12:20 PM

crm.zoho.com/crm/orairobotics/tab/Leads/custom-view/538777200000087501/canvas/5387772000000375007?filter_id=5387772000000494005&page=1

CRM Home Leads Contacts Accounts Deals

4 Records Selected. Clear Run Macro Send Email

ORAI-Send WhatsApp

Params 3

Params 4

Params 5

Media URL

Send

System Defined Filters

- Touched Records
- Record Action
- Related Records Action
- Latest Email Status
- Activities
- Notes
- Campaigns

Filter Leads by

Search

Untouched Records

By User & System

In the last 2 days

Sujit Das Biswas
Sep 30, 2022 11:57 AM

Sujit Das Biswas
Sep 30, 2022 11:49 AM

Sujit Das Biswas
Sep 29, 2022 01:10 PM

Sujit Das Biswas
Sep 29, 2022 12:35 PM

Sujit Das Biswas

6. Support – ORAI Robotics Help Desk.

Thank you for installing the ORAI Robotics chatbot. If you have any questions or are facing installation issues, please contact ORAI Robotics support Desk for Zoho extensions via email at info@orai-robotics.com or call us at +91 8660161319.
