

# ORAI Robotics Chatbot Integration for Zoho CRM

# **Zoho CRM Extension**

Help Document Version 1.0

Prepared By ORAI Robotics

# Table of Content

#### Contents

1.	Overview		3				
	1.1.	Install the ORAI Robotics Chatbot Extension	3				
	1.2. Finding Your ORAI Robotics Chatbot Credentials						
	1.3. Uninstall the ORAI Robotics Chatbot Extension for Zoho CRM						
2.	. Settings – ORAI Service Provider Configuration						
Afte	er installing	the extension in Zoho CRM, the ORAI Service Provider Configuration.	5				
3.	- Push Leads from ORAI 6						
	3.1.	Sync Leads from ORAI to Zoho CRM	6				
4.	Chatbot Hi	story	7				
5.	Support Contacts 11						

# 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.

ORAI Robotics Chatbot Extension for Zoho CRM	$\times$
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."

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          Install for admins only         Install for all users	
Choose profiles	

#### **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.
- Srowse 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
- 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 C	RM - Settings	
	ORAI Service Provider	
	Service Provider *	
	ORAI-D 🗸	
	APIKEY	
	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 ProviderPhone Number
- : ORAI K
- : <Provide your valid Phone Number>

: < Provide your valid LAP Account ID>

- ✤ API KEY : <Provide your valid API KEY>
- SID 🕹
- LAP Account ID
- : <Provide your valid Bot Key>

: < Provide your valid SID>

Bot Key

All Extensions Installed Updates		
← ORAI Robotics Chatbot Extension for Zoho CR	M - Settings	
]	ORAI Service Provider	
	Service Provider *	
	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

CRM Home Leads Contacts	s Accounts Deals Tasks N	Aeetings Calls Reports	Analytics Products	Quotes Services	Projects	30	Enterprise-Trial	QÞĔĊ	• # • I	
← Mehak Gupta -	ORAI Education			1	Send Email	Convert Edit	ORAI Robo	otics Chatbot	•	< >
Related List	Overview Timeline									
Attachments Products Open Activities Closed Activities Invited Meetings Emails	Lead Owner Ernail Phone Mobile Lead Status	Divya Jyoti 								
Social Add Related List	Hide Details Lead Information									
Links	Lead Owner Divya Jyot	1			Company	ORAI Education				
Add Link	Title –				Lead Name	Mehak Gupta				
	Phone				Email					
	Mobile -				Fax					
	Lead Source				Website					

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

CRM Home Leads Co	ontacts Accounts Deals	ORAI Robotics Chatbot	×	Enterprise-Trial   Q A 🖬 🖬 📾 🌚   🛄 🏭
← Naga Raj - Dhi	ruvsoft	Search.	<b>,</b>	rt Edit ORAI Robotics Chatbot
Related List     Notes	Overview Timeli	<b>User</b> 2022/08/08 15:08:23 Hello		Last Update : 11:13 AM
Attachments Products Open Activities Closed Activities Invited Meetings Emails Campaigns Escale	Lead Own Em Pho Mob Lead Stat	Bot 2022.08.08 15:08:25 S Last time we have spoken in English regarding , Please select a language for todays Bot 2022.08.08 15:08:26 *1)* ENG - English *2)* HIN - Hindi		Best time to Today Call No best time for the day Email No best time for the day
Add Related List Links Add Link	Hide Details	Bot 2022/08/08 15:15:10 Looks like we missed the conversation in between please let me know what are you looking for or reply "Hi" to start the conversation.	T	



#### **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.

← → C	00000986001	🖻 🏚 🖬 🔞 🗄
S CRM Home Leads Contacts Accounts Deals	ORAI Robotics Chatbot $\qquad \qquad \qquad$	옥 수 탑 혀 密 ‡   📑 🏭
← Mehak Gupta - ORAI Education	For any further query or issue contact us at test . Regards, Team test	dit ORAI Robotics Chatbot 🔹 🚥 < 🗲
Related List Overview Timeli	roun teat	Last Update : 3 day(s) ago
Notes Attachments Lead Own Products Em Open Activities Phon Closed Activities	User 2022/10/03/13/26/42 https://www.logodesign.net/logo/line-art-house-roof-and-buildings-4485id.ong Hi test, please select the correct answer from the below option. 1. test 2. test 3. test	Best time to Today Call No best time for the day Email
Invited Meetings Hood Emails Lead Stat Campaigns	User 2022/10/03 13 26 42	No best time for the day
Social Hide Details Add Related List Lead Information Links Lead Owner Si	Hi test, please select the correct answer from the below option. 1. test 2. test 3. test 3. test	
Add Link Desgination - Phone Mobile -	Write a response Send Choose Templato Website -	

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

← → C 🔒 crm.zoho.com/crm	/orairobotics/tab/Leads/538777	2000000986001			l	e 🖈 🗯 🖬 🕓 :
CRM Home Leads Co	ontacts Accounts Deal	ORAI Robotics Chat	bot	×	오 수 탑 (	i 📾 🏟 I 💽 🏭
← Mehak Gupta	- ORAI Education		Choose Template	iit	ORAI Robotics Chatbot	• ••• < >
I Related List	Overview Time	Choose Template Type	Media	~		Last Update : 3 day(s) ago
Notes					Best time to	Today
Attachments	Lead Own	Template Name	Template Type	Language		,
Products	En	Survey	Media		Call	
Open Activities	Pho	Report	Media		No best time for the day	
Closed Activities	Mot		incolu		Email	
Invited Meetings	Load Sta	Img Nof	Media		No best time for the day	
Emails	Lead Sta					
Campaigns						
Social	Hide Details					
Add Related List				User 2022/07/14 12:42:58		
Unio	Lead Information			1		
LINKS	Lead Owner S.					
Add Link	Desgination -					
	Phone	write a response		Send Choose Template		
	Mobile -			Website -		

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

← → C 🔒 crm.zoho.com/crm/c	prairobotics/tab/Leads/538777	200000986001		🖻 🖈 🖬 📵 🗄
CRM Home Leads Cor	ntacts Accounts Deals	ORAI Robotics Chatbot	×	오 수 탑 🗔 📾 🍩   📑 🏭
← Mehak Gupta ↔	ORAI Education	Template Name		t ORAI Robotics Chatbot • · · · · · · · · · · · · · · · · · ·
Related List     Notes	Overview Timel	Body Format		Last Update : 3 day(s) ago
Attachments Products	Lead Owr Em	Regards, Team ({\$\$})	* *	Best time to Today Call
Open Activities Closed Activities	Pho Mob	Params 1		No best time for the day Email
Invited Meetings Emails	Lead Stat	Params 2		No best time for the day
Social Add Related List	Hide Details	Parame 3		
Links	Lead Information Lead Owner St	Faramis V	•	
Add Link	Desgination – Phone	Write a response Send Ci	hoose Template	

# 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.



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.

← → C	botics/tab/Leads/custom	-view/538777200000087501	/canvas/5387772000000375007?filter_id=	5387772000000494005&page=1		ie 🖈 🗯 🗖 🔞 🗄
CRM Home Leads Contact	s Accounts Deals	ORAI-Send Wha	tsApp		$\times$	く 수 🖻 🖨 🕸   🔲 🏭
4 Records Selected. Clear Run Mac	ro 👻 Send Email					< 1to6 >
▼ Saved Filters	😑 Canvas Vi	Choose Template Type	Media	~		Sort By 👻 📔 Fit to Screen
ORAI 6						Sujit Das Biswas
Filter Leads by		Template Name	Template Type	Language		Sep 30, 2022 11:57 AM
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Untouched Records		Report	Media			Sujit Das Biswas
By User & System 👻						Sep 30, 2022 11:47 AM
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Touched Records						Sep 29, 2022 01:10 PM
Record Action	_					
Related Records Action						Suiit Das Biswas
Latest Email Status						Sep 29, 2022 12:35 PM
Activities						
Notes						
Campaigns						Sujit Das Biswas Sep 29, 2022 12:20 PM
▼ Filter By Fields						
City					_	

Image: CRM Home Leads Contacts Accounts Deals      4 Records Selected. Clear   Run Macro - Send Emal Params 3   9 Farms 3   Image: Selected and Selected and Clear Image: Selected and Clear   Params 4   Image: Selected and Selected and Clear Image: Selected and Clear   Params 5   Image: Selected and Selected and Clear Image: Selected and Clear   Params 5   Image: Selected and Selected and Clear Image: Selected and Clear   Params 6   Image: Selected and Selected an	← → C () crm.zoho.com/crm/orairobotics/tab/Leads/custom-view/538777200000087501/carvas/5387772000000375007?filter_id=5387772000000494005&page=1				🖻 🖈 🗖 📵 🗄
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Related Records Action     Sujit Das Biswas       Latest Email Status     Sujit Das Biswas       Activities     Sep 29, 2022 12:35 PM       Notes     Send	System Defined Filters     Touched Records     Record Action		Media URL		Sujit Das Biswas Sep 29, 2022 01:10 PM
	Related Records Action     Latest Email Status     Activities     Notes		Send		Sujit Das Biswas Sep 29, 2022 12:35 PM

# **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 <u>info@orai-robotics.com</u> or call us at +91 8660161319.

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