

AI Tools

Sale People Chatbot

Your sales team can consult and update CRM from a conversation.

The **Sale People Chatbot** lets salespeople access **Zoho CRM in real time**, consult records, and make updates from their phones, without installing another app.

 **Conversation with CRM**

I need to see the Acme opportunity before joining the meeting.

The opportunity is in the **Proposal** stage, with the last contact logged yesterday.

Update the next action for tomorrow.

  InterConnecta 

CONTEXT

When checking the CRM interrupts the customer conversation

Sales reps working outside the office constantly need access to information about **customers, contacts, and opportunities**.

In the middle of a visit or sales conversation, opening the CRM, finding the record, and reviewing the needed data can slow the work down. The same happens when reps need to **update information after an interaction**.

The Sale People Chatbot turns those tasks into a direct conversation with Zoho CRM.

 **CRM without switching screens**

Consult records available to each user.

Find the contact for the active account.

Responds with CRM data in real time.

Log the meeting follow-up.

HOW IT WORKS

From **CRM** to a conversation

The salesperson writes what they need to know in the chat, the chatbot checks **Zoho CRM**, and responds with the information available to that user.

When the process requires it, the rep can also request record changes from the same conversation.

01

Ask

The salesperson writes what they need to know about a customer, contact, or other available record.

02

Check Zoho CRM

The chatbot accesses information in real time and responds using the data available to that user.

03

Update

The salesperson can request changes to records from the same conversation.

04

Continue to the next step

With the information available, the rep can decide how to move forward without navigating across different CRM screens.

ON THE MOVE

Built for reps working **on the move**

Access can be shared through a **chat link** or embedded in a mobile app or website.

This makes it usable from a phone during everyday sales activities.



Sales visits

Consult key information during visits and conversations.



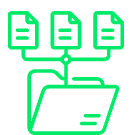
Customer meetings

Quick access before or during a sales meeting.



Follow-ups outside the office

Log follow-up actions without returning to the desk.



Information updates

Keep records up to date after each interaction.

| ACCESS

Each rep accesses only what they are **authorized** to see

The chatbot uses **role-based access control** (RBAC).

This means each user can only consult or manage information already available to them in Zoho, preserving the access rules defined for the sales team.

Conversation linked to the **CRM**

The connection through **MCP** keeps the conversation linked to CRM information in real time.

Access respects the permissions defined in Zoho so each rep works with the information assigned to them.



InterConnecta



InterConnecta

| **Sale People Chatbot**

Brochure 05 / 08

IMPACT

What changes for **salespeople**

CRM becomes more accessible for teams that spend much of their day away from the desk.

Less navigation inside the CRM

They can request the **information they need** directly.

Updates from the same chat

The conversation can also be used to keep **records up to date**.

Access from the phone

CRM becomes more accessible for teams working away from the desk.

Information by user

Access preserves the **permissions defined in Zoho**.

Who it is **designed** for

- Field salespeople.
- Teams that need to consult Zoho CRM during visits or meetings.
- Sales reps who frequently work from their phones.
- Processes where keeping CRM updated after each interaction matters.



Field representatives

They access sales information from their phones during visits or routes.



Checks during meetings

The team can review CRM data while the customer conversation is happening.



CRM from the phone

An experience designed for salespeople who often work away from the desk.



Updated records

For processes where keeping CRM up to date after each interaction matters.

The **CRM** available when the sales conversation happens

InterConnecta connects the **Sale People Chatbot** with **Zoho CRM** so the team can consult and update information through a conversational experience while preserving existing access controls.

Do your reps need to open CRM every time they want to check a detail during a visit?

Talk to an InterConnecta specialist ↗