

Integration with Zoho CRM

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Overview

The Ideolve + Zoho CRM integration can **enable two important use cases** in your organization

Information Archival

Organizations use Zoho CRM to keep track of accounts and deals. This is important data that needs to be archived for deeper analyses or future reference.

The Ideolve + Zoho CRM integration allows you to easily create an archive of all account and deal information created within the CRM system

Collaboration

The CRM is manned by Sales and Marketing people.

For some accounts or deals, the sales team members need to collaborate with other experts within the organization for quick and quality resolutions.

The Zoho CRM + Ideolve integration provides an efficient way of collaboration between the Sales Team on CRM and experts in the organization for quick and quality resolutions of queries and inquiries.

Automatic sharing of all the information about the account or deal entered by the sales team in the CRM with the experts on Ideolve reduces the resolution time drastically and also improves the quality of the response.

Workflow

For all use cases

- For every Zoho CRM organizational account, a corresponding workspace has to be created on Ideolve.

- Whenever a new account or deal is created in CRM, a corresponding note is created in Ideolve.
- Whenever the sales team updates the account details or any information regarding the deal, the Ideolve note will be updated with a comment.

For collaboration

- While the Salespeople have a login on Zoho CRM and Ideolve, the experts will have a login only on Ideolve.
- Whenever a new account or deal is created in CRM, a corresponding note is created in Ideolve.
- Whenever the sales team updates the account details or any information regarding the deal, the Ideolve note will be updated with a comment.
- When the salesperson wants to collaborate with an expert within the organization to resolve the query or inquiry, he will simply share the note with the experts on Ideolve
- Each member of the expert group will get an email alert.
- Experts can then log in to Ideolve, and browse through all the information provided recorded for the account or deal.
- Experts then communicate & collaborate with the salespeople using the note in Ideolve and arrive at the follow-up action.

Getting Started

This section documents the **one-time configurations** required to integrate Zoho CRM and Ideolve.

Step 1: Sign up on Ideolve

1. Sign up for Ideolve using an email id on your official domain. This email id is the primary contact for your organization and will be required in further steps.
2. Login to Ideolve and Create a workspace that will receive the Zoho CRM account and deal updates in notes.
3. If you want to use the inetgration for enhanced collaboration,
 1. Create two groups - a sales team group and an experts group.
 2. Invite users of both groups to the Workspace
 3. Update workspace controls and default note controls to secure access and content. The suggested controls allow all invitees to add comments to notes automatically created in the workspace but do not allow them to delete or create notes.

Step 2: Collect Zoho CRM credentials to configure the integration with Ideolve

Get the following information from Zoho CRM to configure the integration:

1. Zoho Host
2. Zoho Client Id
3. Zoho Client Secret
4. Zoho Refresh Auth Token

References:

- Zoho - <https://www.zoho.com/crm/developer/docs/api/v3/register-client.html>

1: Register your application (referred from: <https://www.zoho.com/crm/developer/docs/api/v3/register-client.html>)

- Go to [Zoho Developer Console \(https://api-console.zoho.com/\)](https://api-console.zoho.com/).
- Choose a Web-based client
 - Client Name: ConnectorClient

- Scope: ZohoCRM.modules.ALL
- Homepage URL: <Provide the site address>. For example <https://www.mithi.com> (<https://www.mithi.com/>)
- Redirect URL: <Provide the site address>. For example <https://www.mithi.com> (<https://www.mithi.com/>)
- Click on Create
- Output - Check the Client Secret tab, It will generate the Client Id and Client Secret

2: Generate the **code attribute** to further generate the refresh and access tokens

- Replace the placeholders in the following URL:
 - https://accounts.zoho.com/oauth/v2/auth?scope=ZohoInvoice.fullaccess.all&client_id=<GENERATED_CLIENT_ID>&response_type=code&redirect_uri=<REDIRECT_URL used while registering the app>&prompt=consent&access_type=offline
- Run the request on a web browser
- It will ask for the user - please enter your Zoho login id. For example in our case, enter it@mithi.com
- The page will be redirected to the redirect URL mentioned in step 1 - <www.mithi.com>.
- Output - Fetch the value of the **code** param from the URL.

3: Generate the refresh and access tokens for the client. We will need Postman or an equivalent REST client to make a POST request.

- Go to Postman or an equivalent REST client to send a POST request.
- Make a POST request to API, and replace the placeholders with values acquired in previous steps.
 - https://accounts.zoho.in/oauth/v2/token?grant_type=authorization_code&client_id=<GENERATED_CLIENT_ID>&client_secret=<GENERATED_CLIENT_SECRET>&redirect_uri=<REDIRECT_URL>&code=<CAPTURED_CODE from step 2>
- The following sample response would be generated upon posting the request.

```
{
  "access_token": "1000.....",
  "refresh_token": "1000.....",
  "api_domain": "https://www.zohoapis.in",
  "token_type": "Bearer",
  "expires_in": 3600
}
```

Step 3: Get Ideolve Client ID and Access Key

1. Login to Ideolve
2. Click on the User Profile Icon accessible from the top left corner
3. Access Connect to Other Applications
4. Choose the application Zoho CRM
5. Put the following information in the form
 - Zoho CRM Details
 - Host
 - Zoho Host URL
 - Client Id
 - Zoho Client Id collected in Step 2.1
 - Client Secret
 - Zoho Client Secret collected in Step 2.1

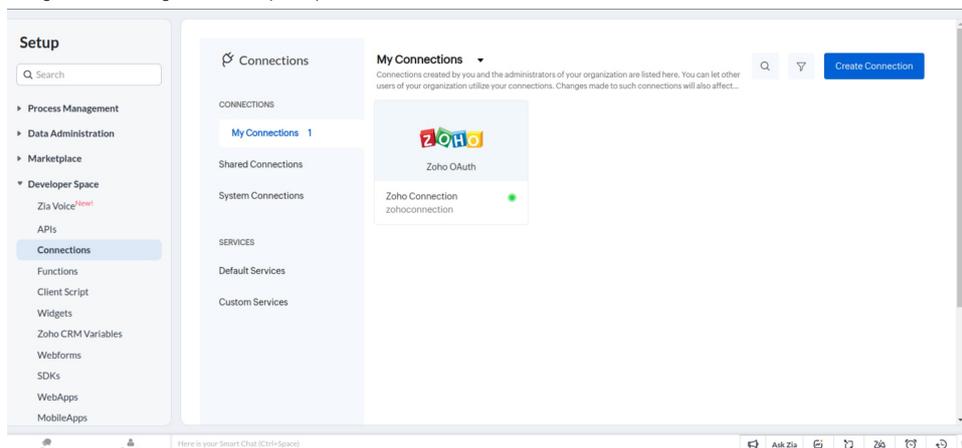
- Grant Type
 - refresh_code, choose it as default.
- Refresh Token
 - Zoho Refresh Auth Token generated in Step 2.3
- Ideolve Details
 1. Select the user
 - User will be a primary user to get all the tickets as a note, choose the user created in Step 1
 2. Choose the workspace
 - Workspace in which all notes will be created and shared, choose the workspace created in Step 1.
- 6. On save, an Ideolve API Key and Client Id are created
- 7. Use the API Key and Client Id in the deluge functions mentioned below.

Step 4: Configure Zoho Authentication

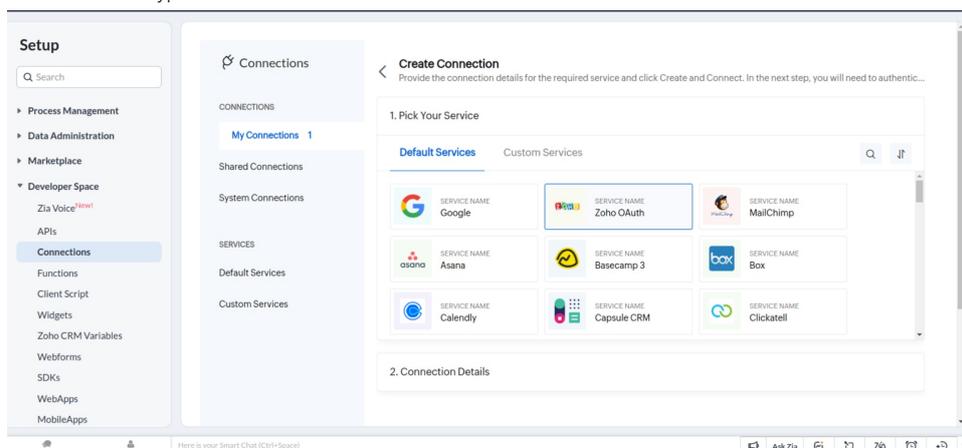
Functions in Zoho need access to Zoho authentication for easier data access. The auth connections are maintained and managed by Zoho itself, we need to provide appropriate scopes to enable easier data access.

To enable the auth connection for our purpose, please enable the below settings

- Navigate to Settings -> Developer Space -> Connections

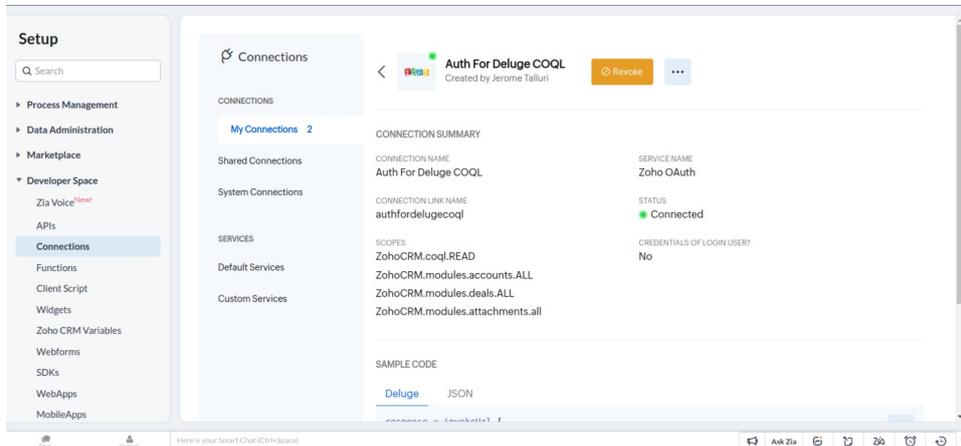


- Create connection
- Choose Service Type: Zoho OAuth



- Enter the following details in the form:
 - Connection Name: Auth For Deluge COQL
 - Connection Link Name: authfordelugecoql
 - Scopes:
 - ZohoCRM.coql.READ

- ZohoCRM.modules.accounts.ALL
- ZohoCRM.modules.deals.ALL
- ZohoCRM.modules.attachments.all
- Create and Connect
- A popup asking for permissions to enable connection -> Select Connect
- Another popup asking if Deluge functions can access CRM -> Select Accept
- Finally, this is how the connection would look after saving



Step 5: Configure Zoho CRM workflows

Configure Zoho CRM automation for updates to accounts or deals created in the CRM. The following workflows need to be created for each when a relevant trigger is generated.

- A workflow to create a note on Ideolve when an account or deal is created.
- A workflow to update a note on Ideolve when an account or deal is updated.
- A workflow to add a comment to the note on Ideolve when a deal is associated with the account.
- A workflow to add a comment to the note on Ideolve when a meeting is added to the account.

There are a few actions that do not have triggers, so we need to configure those workflows on a fixed schedule. The schedules to be added are:

- A schedule to sync attachments from accounts to the note on Ideolve
- A schedule to sync attachments from deals to the note on Ideolve

Zoho CRM Workflow configurations

Functions

To configure the workflows to be scheduled or invoked on triggers as mentioned above, you will need to first add the functions to be called in the workflows.

Functions in Zoho CRM are written in [Deluge Scripting language](https://www.zoho.com/deluge/help/) (https://www.zoho.com/deluge/help/)

Refer: https://help.zoho.com/portal/en/kb/crm/automate-business-processes/actions/articles/associate-functions-workflow-rules#Set_Up_Functions

The list of functions to be added are as below:

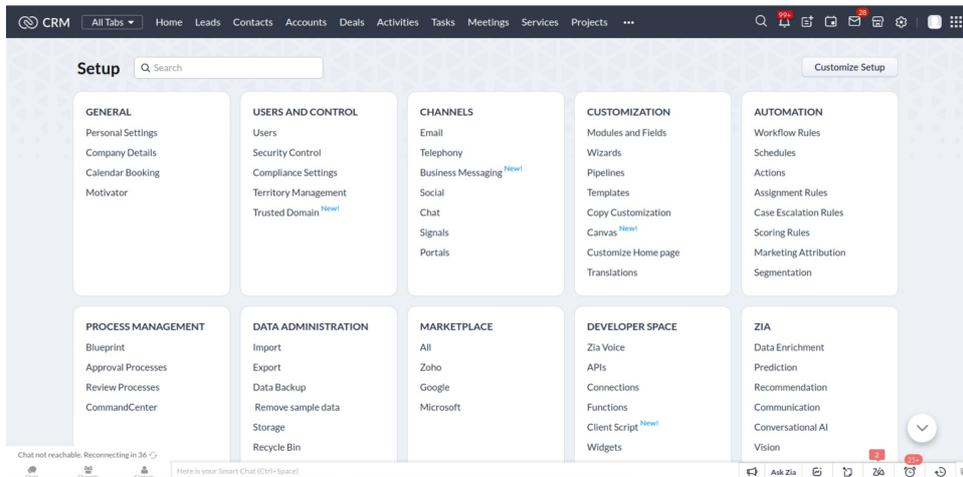
Purpose	Function Name	Description	Type	Module	Code
To add an Ideolve note on new account creation	create-note-on-new-account	Create a note in Ideolve on new account creation	Automation	Accounts	create-account-on-ideolve.txt (https://web.ideolve.com/ideolve.ws/user/sandeep.sukhija@mithi.com/note/ec8117b2-d5b3-45e1-b935-224936661101/file/afbaad61-11b1-489a-add2-0c2bd96d942d?cmd=download)
To add an Ideolve note on new deal creation	create-note-on-new-deal	Create a note in Ideolve on new deal creation	Automation	Deals	create-deal-on-ideolve.txt (https://web.ideolve.com/ideolve.ws/user/sandeep.sukhija@mithi.com/note/ec8117b2-d5b3-45e1-b935-224936661101/file/1482b035-2bf4-43ad-9ba8-052d9203168e?cmd=download)
To update an Ideolve note when an account is updated	update-note-on-account-update	Update note in Ideolve on account update	Automation	Accounts	update-note-on-account-update.txt (https://web.ideolve.com/ideolve.ws/user/sandeep.sukhija@mithi.com/note/ec8117b2-d5b3-45e1-b935-224936661101/file/ec184a22-b6b3-42c9-b52e-4d5ad58adb57?cmd=download)
To add a comment in an Ideolve note when a meeting is added to the account	add-comment-on-meeting-in-account	Add a comment in Ideolve note when a meeting is added to an account	Automation	Accounts	account-meetings-to-ideolve-comment.txt (https://web.ideolve.com/ideolve.ws/user/sandeep.sukhija@mithi.com/note/ec8117b2-d5b3-45e1-b935-224936661101/file/aa61eadb-a846-4f30-b358-30d285230a15?cmd=download)
To add a comment in an Ideolve note when a deal is added to the account	add-comment-on-deal-in-account	Add a comment in Ideolve note when a deal is associated with an account	Automation	Accounts	account-deals-to-ideolve-comment.txt (https://web.ideolve.com/ideolve.ws/user/sandeep.sukhija@mithi.com/note/ec8117b2-d5b3-45e1-b935-224936661101/file/515970f8-6389-4191-9782-2d489baa9414?cmd=download)
To sync attachments from accounts to Ideolve notes	sync-account-attachments	Sync attachments in the accounts to respective Ideolve notes	Schedule	Accounts	handle-account-attachments.txt (https://web.ideolve.com/ideolve.ws/user/sandeep.sukhija@mithi.com/note/ec8117b2-d5b3-45e1-b935-224936661101/file/a9580141-3526-4521-be1e-e7bcc535bf5?cmd=download)

Purpose	Function Name	Description	Type	Module	Code
To sync attachments from deals to Ideolve notes	sync-deal-attachments	Sync attachments in the deals to the respective Ideolve notes	Schedule	Deals	handle-deals-attachments.txt (https://web.ideolve.com/ideolve.ws/user/sandeep.sukhija@mithi.com/note/ec8117b2-d5b3-45e1-b935-224936661101/file/1758fe30-770e-47c5-9ddb-c19305fb498e?cmd=download)

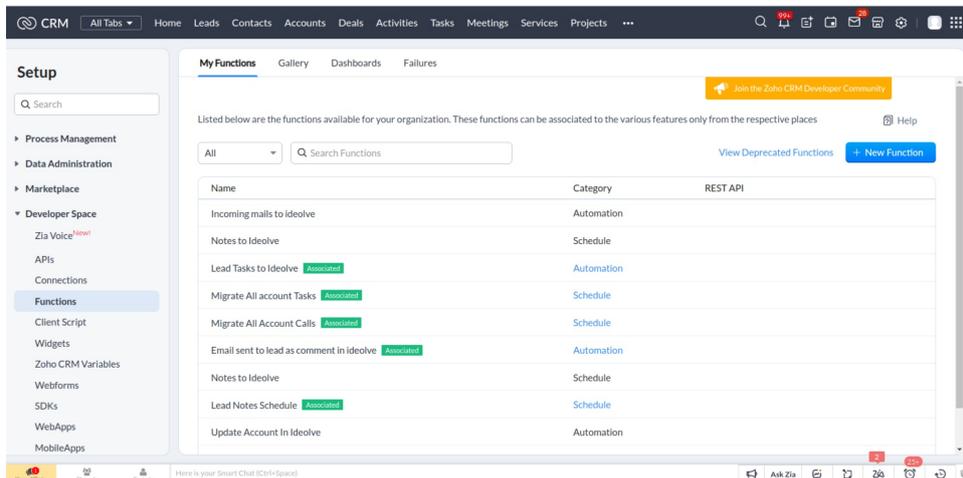
Note: The client ID and API key retrieved from Ideolve have to be configured in the functions.

Creating a function

1. Log in to Zoho CRM
2. Navigate to Set up



3. Under Developer Space, select Functions



Workflows

The workflows are called on triggers or on schedules.

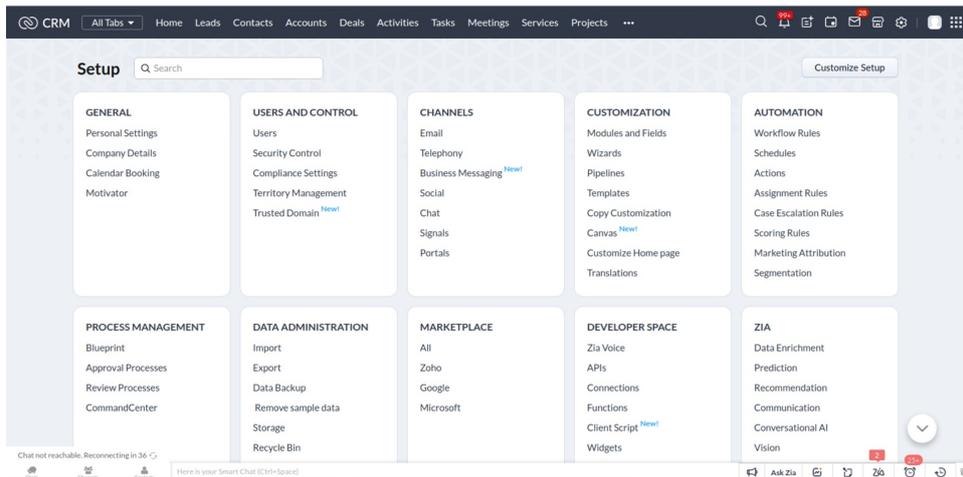
Refer : <https://help.zoho.com/portal/en/kb/crm/automate-business-processes/workflow-management/articles/configuring-workflow-rules>

The workflows to be added are as follows

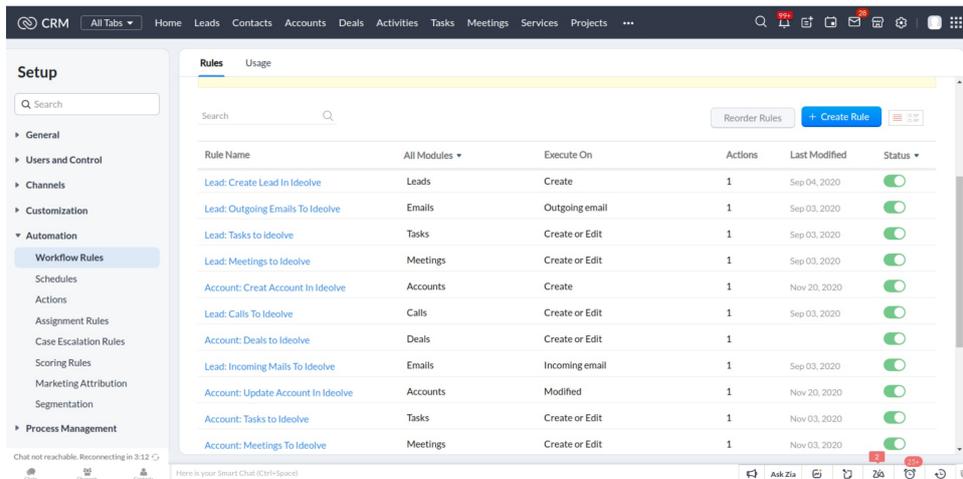
Purpose	Workflow rule name	Module	Description	When to execute the rule	When to apply	Action	Select Function
To create an Ideolve note on new account creation	Create Ideolve note on account creation	Accounts	To create an Ideolve note on new account creation	On record action - Create	for all accounts	Function	create-note-on-new-account
To create an Ideolve note on new Deal creation	Create Ideolve note on deal creation	Deals	To create an Ideolve note on new Deal creation	On record action - Create	for all Deals	Function	create-note-on-new-deal
To update Ideolve notes on account updates	Update ideolve note on account update	Accounts	To update Ideolve notes on account updates	On record action - edit	for all Accounts	Function	update-note-on-account-update
To add a comment in an Ideolve note when a meeting is added to the account	Add comment in Ideolve on meeting in account	Accounts	To add a comment in an Ideolve note when a meeting is added to the account	On record action - Create	for All accounts	Function	add-comment-on-meeting-in-account
To add a comment in an Ideolve note when a deal is added to the account	Add comment in Ideolve on Deal in account	Accounts	To add a comment in an Ideolve note when a deal is added to the account	On record action - Create	for All accounts	Function	add-comment-on-meeting-in-account

Create a new workflow rule

1. Log in to Zoho CRM
2. Navigate to Set up



3. Under Automation, select Workflow Rules

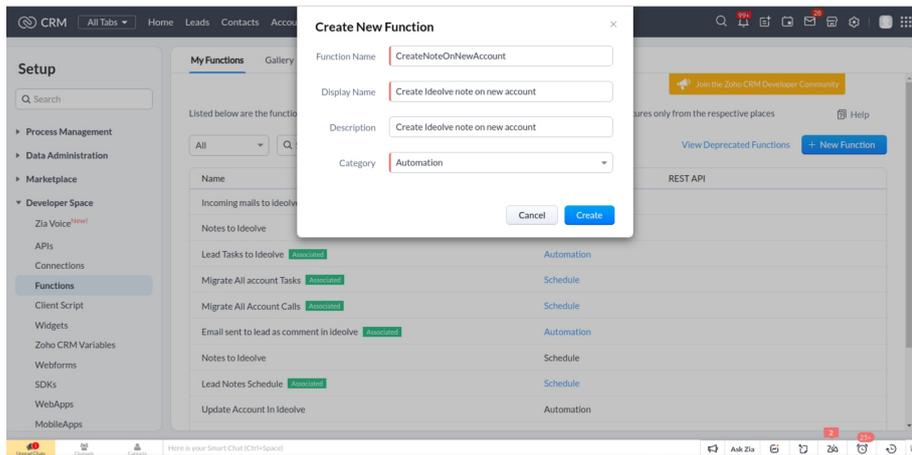


Sample workflow addition: Add a workflow to create a note on Ideolve when a new account is created.

1.

Add a function Create Note on New Account

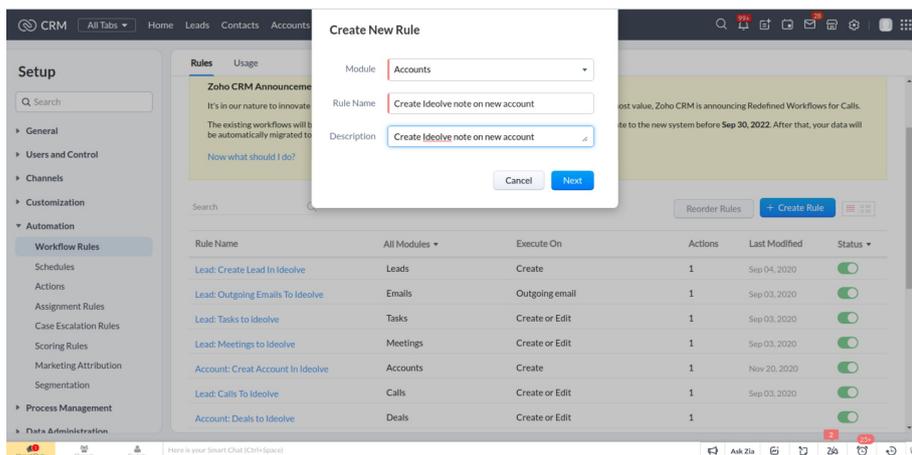
- Function name: CreateNoteOnNewAccount
- Display name: Create a note on the new account
- Description: Create an Ideolve note on the new account
- Category: Automation
- Click on Create to add a function



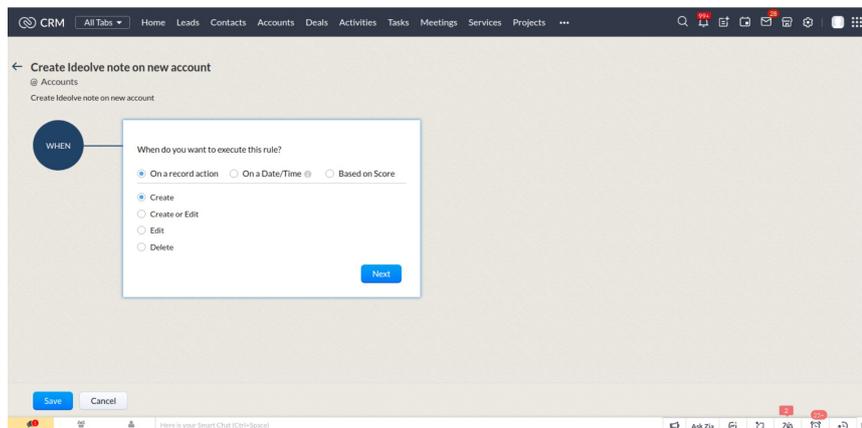
- Copy and paste the code attached here
- Replace the API key and Client id placeholders (acquired in Step 3.7) in the code [IMPORTANT]
- Save the function

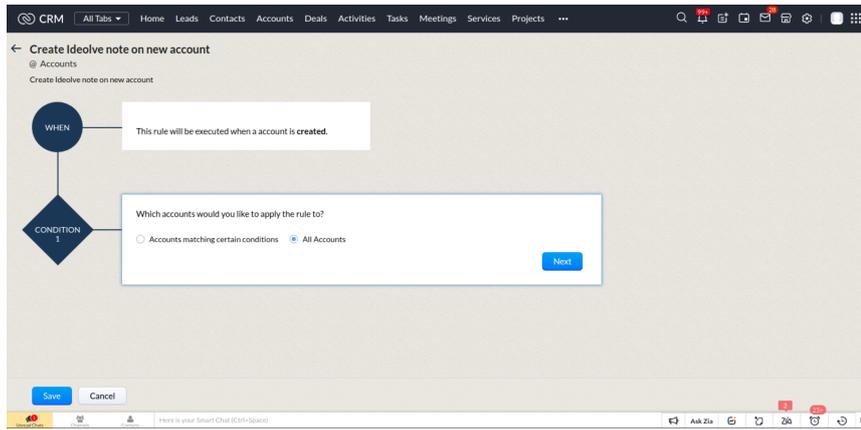
2. Add workflow with the following details

- Module: Accounts
- Rule Name: Create a note on the new account
- Description: Create a note in Ideolve on the new account addition
- Click on Next to proceed

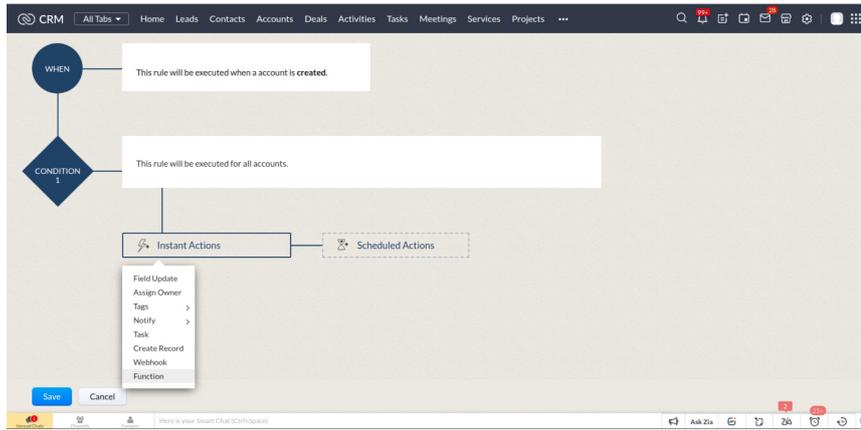


- On the next screen,
 - Select create action for All Accounts

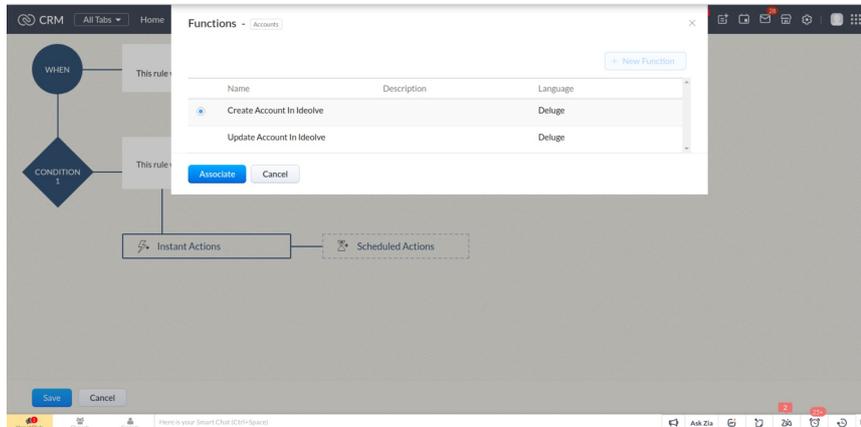




■ Choose action Create Function



■ Choose the function you had created - CreateNoteOnNewAccount



Please follow the same process to create new functions and workflow rules

Schedules

Certain workflows are to be called on predefined schedules.

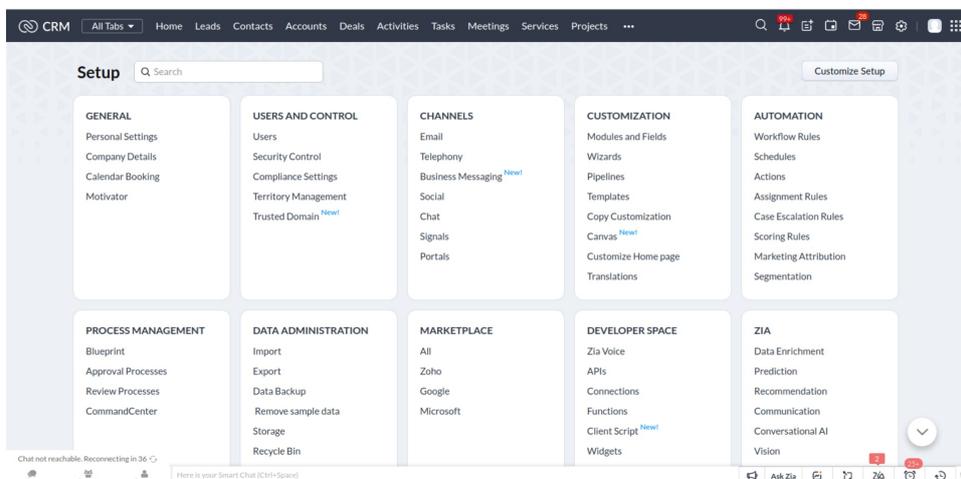
Refer : https://help.zoho.com/portal/en/kb/crm/automate-business-processes/schedules/articles/custom-schedules#Create_Schedules

The schedules to be added are:

Purpose	Schedule Name	Description	Function to be executed	Schedule
To sync attachments from accounts to Ideolve notes	SyncAccountsAttachments	To sync attachments from accounts to Ideolve notes	sync-accounts-attachments	Every 2 hours
To sync attachments from deals to Ideolve notes	SyncDealsAttachments	To sync attachments from deals to Ideolve notes	sync-deals-attachments	Every 2 hours

Add a new Schedule

1. Log in to Zoho CRM
2. Navigate to Set up



3. Under Automation, select Schedules

Maintenance of the Ideolve + Zoho CRM connector

As the team composition of the agents and experts changes, Freshdesk and Ideolve configurations have to be updated as mentioned in the sections below.

Adding a new SalesPerson

1. Add the new agent on CRM
2. Login to Ideolve using the email id of the primary contact.
 1. Invite the agent to the workspace
 2. Add the user id to the sales team group

Removing a SalesPerson

1. Remove the agent from CRM
2. Login to Ideolve using the email id of the primary contact and remove the salesperson from the sales team group
3. Disable the salesperson account

Adding a member to the Experts team

1. Login to Ideolve using the email id of the primary contact.
 1. Invite the expert to the workspace
 2. Add the user id to the experts group

Removing a member from the Experts team

1. Login to Ideolve using the email id of the primary contact and remove the user id from the experts group
 2. Remove the user from the group [[Link to manage groups for workspace](#)]
-