

Setup for ZohoCRM

Security

Whatever user you use to get the api key from is the user all actions will appear from. It is recommended that you create a separate API user. The api key has the same rights at the user it is generated under.

Storage

- Recordings and voicemails must be under 20MB. Recording time will depend on the recording format
- The default storage allotment 512MB to 1GB per user. Check your Zoho account to see what your storage allotment is.
- Depending on configuration 1 file may be uploaded to multiple places.

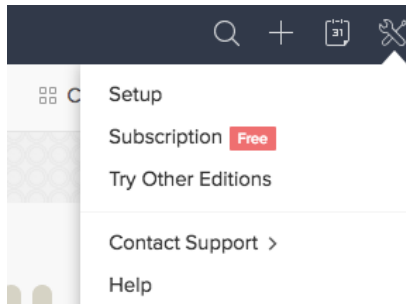
Zoho Setup

Note: starting Zoho API 2.0 this step is no longer required to do in Zoho, please skip to the "Module setup" section below if so accordingly.

Generate an Auth token.

Log in to Zoho CRM (<https://crm.zoho.com>).

Click on the tools icon in the top right corner and click Setup



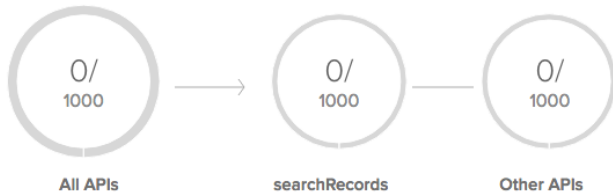
Then under "Extensions and APIs choose APIs

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On the API usage screen there is a gear on the right. Click the gear, then click "Authentication Token Generation"

CRM API

API Usage Statistics



- API Documentation
- API Examples
- API Limits
- Developer Forum
- FAQ
- Authentication Token Generation

In the popup window enter SangomaCRM for the app name then click generate

```
https://accounts.zoho.com/apiauthtoken/nd/create?
SCOPE=ZohoCRM/crmapi&EMAIL_ID=[Username/EmailID]&PASSWOR
[Password]&DISPLAY_NAME=[ApplicationName]
```

You will get the required token as a response.

Browser Mode

SangomaCRM

Generate

To manage your authentication tokens, [Click Here](#)

A new window will open with text that shows the token. You will enter this token in to the module.

```
#
#Fri May 12 15:38:59 PDT 2017
AUTHTOKEN=f[redacted]b
RESULT=TRUE
```

Module setup

For the CRM Type choose Zoho then click Submit. PBX URL is not used and may be safely ignored

CRM Setup

CRM Type


On the next page you will enter the token received above under Auth Token.

Note: starting Zoho API 2.0, manual insertion of an "Auth Token" is no longer required on the PBX, please update your PBX's CRM Link module if connecting to an API 2.0 Zoho system; this will remove the "Auth Token" text field from your PBX's webUI and instead add an "Authorize with Zoho" button which will automatically validate the interconnection between Zoho and the PBX when clicked

For Zoho API earlier than version 2.0:

Auth Token


For Zoho API 2.0:

Auth Token 

Authorize with Zoho


You may also wish to adjust the the settings for voicemails and recordings. Here you can choose to store a copy of voicemails or call recordings on the server. The system can attempt to match the external number to Leads, Contacts or Accounts that match. By default recordings will be saved to the assigned user that answers the call. Keep in mind each match has an independent copy of the file. This means if a lead, contact and account are found there are 3 copies of the file uploaded and counting against any storage quota.

Once the Auth Token and settings are to your liking click Submit.

Store Voicemail On CRM 


Yes

No

Store Call Recording on CRM 

Yes

No

Attach to Record Types 

Leads

Contacts

Accounts