

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.

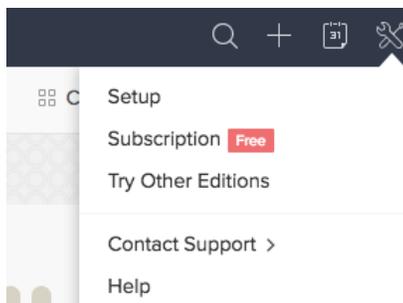
Zoho Setup

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



A settings menu is shown with a gear icon at the top right. The menu items are: API Documentation, API Examples, API Limits, Developer Forum, FAQ, Authentication, and Token Generation. The 'Authentication Token Generation' item is highlighted with a yellow border.

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

```
https://accounts.zoho.com/apiautntoken/nd/create?
SCOPE=ZohoCRM/crmapi&EMAIL_ID=[Username/EmailID]&PASSWORD=[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

Settings> CRM Settings. There you must choose the type of CRM you want to use, in this case Zoho then click Submit.

PBX URL is not used and may be safely ignored.

The screenshot shows the 'CRM Setup' interface. At the top, there is a navigation bar with tabs: Admin, Applications, Connectivity, Dashboard, Reports, Settings, and UCP. Below the navigation bar, the 'CRM Type' dropdown menu is open, showing a list of CRM engines: Select a CRM engine, Connectwise, RestAPI, Salesforce, SuiteCRM/SugarCRM, and Zoho. The 'Zoho' option is highlighted in blue.

Just click ok to accept.

crmtest-zoho.does-it.net says

Changing CRM type might reset all of your settings. Is that okay?

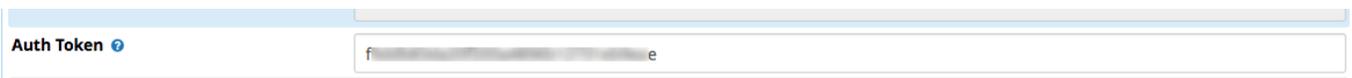
Cancel

OK

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

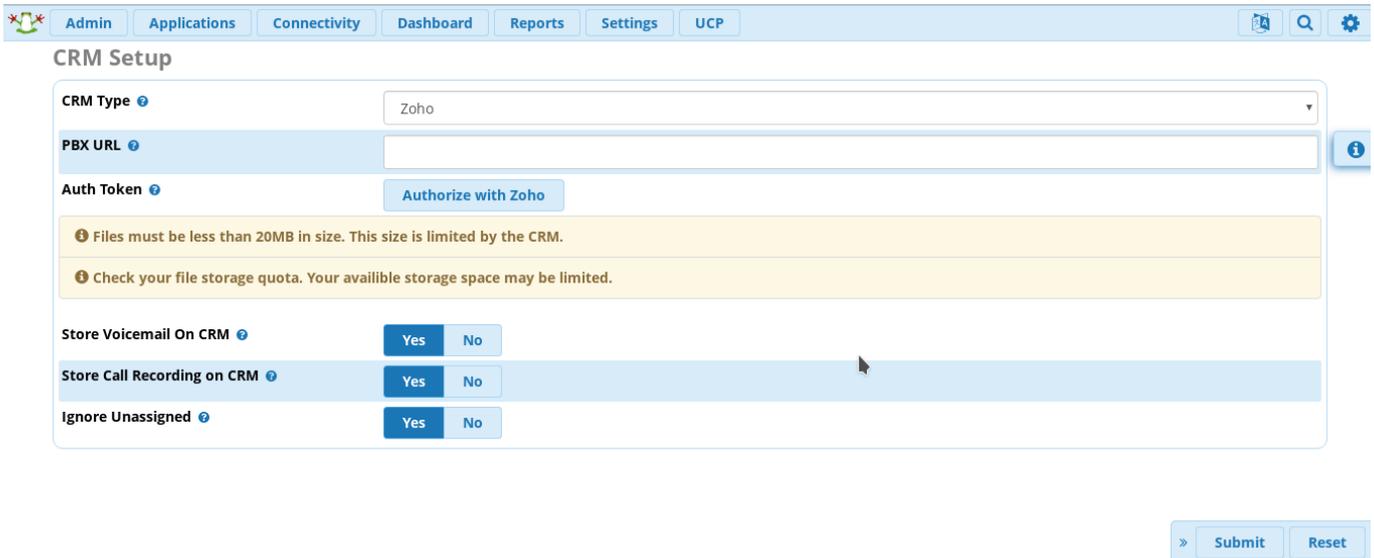
Note: starting Zoho API 2.0, manual insertion of an "Auth Token" is no longer required on the PBX, please update your PBX's CRM Link module if connecting to an API 2.0 Zoho system; this will remove the "Auth Token" text field from your PBX's webUI and instead add an "Authorize with Zoho" button which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

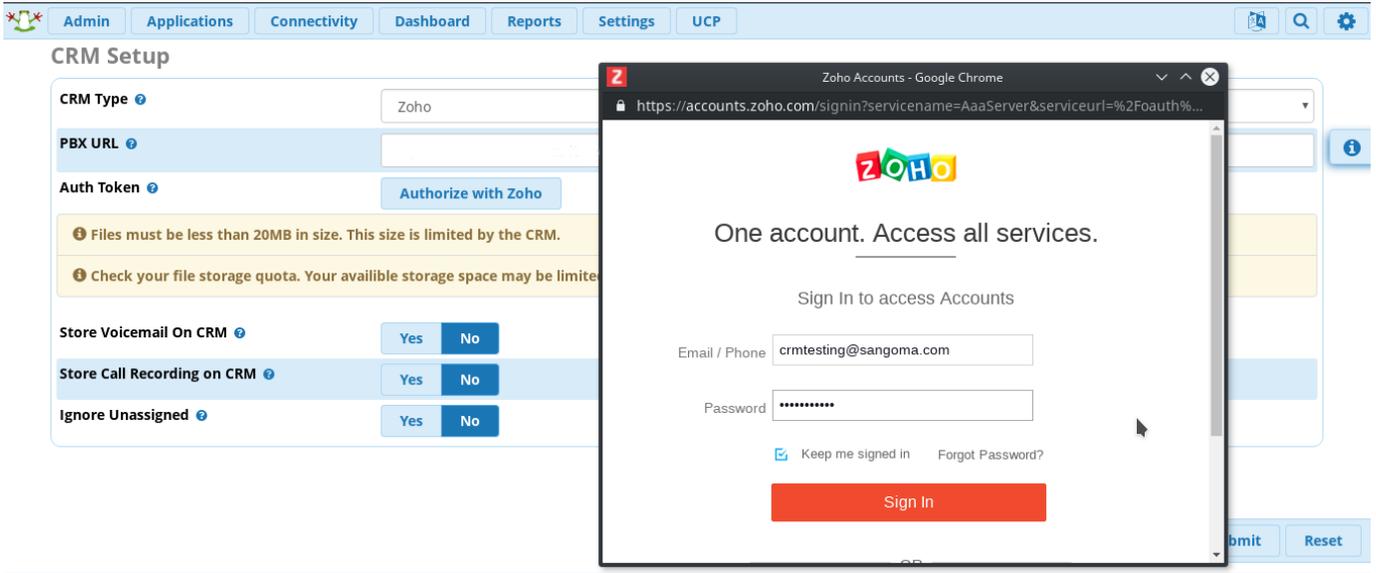
For Zoho API earlier than version 2.0:



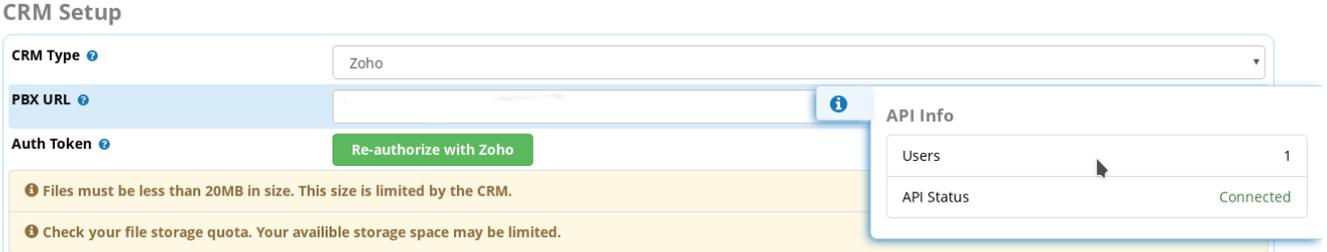
For Zoho API 2.0:

Click on "Authorize with Zoho", you will be asked to login with your Zoho credentials on the next screen.





If connection was successful, you should see API Status as Connected, also the Auth Token button would be green with message "Re-authorize with Zoho"

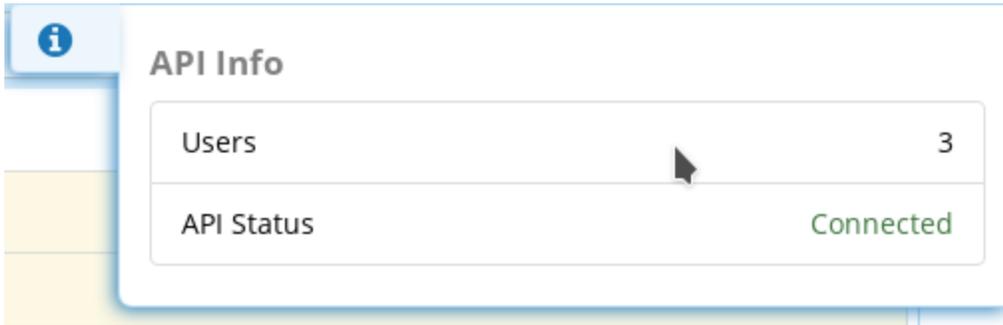


You may also wish to adjust the the settings for voicemails and recordings. Here you can choose to store a copy of voicemails or call recordings on the server. The system can attempt to match the external number to Leads, Contacts or Accounts that match. By default recordings will be saved to the assigned 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.

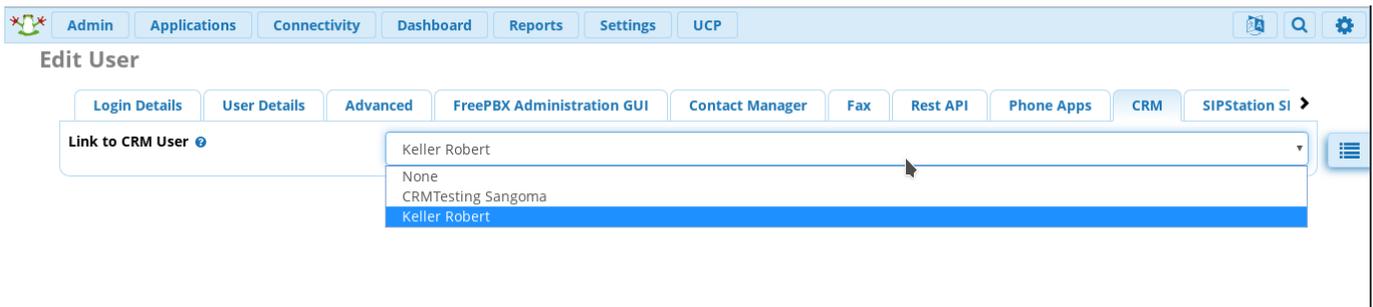


After you create some users on your Zoho account, you should see the same Users on the API Info.



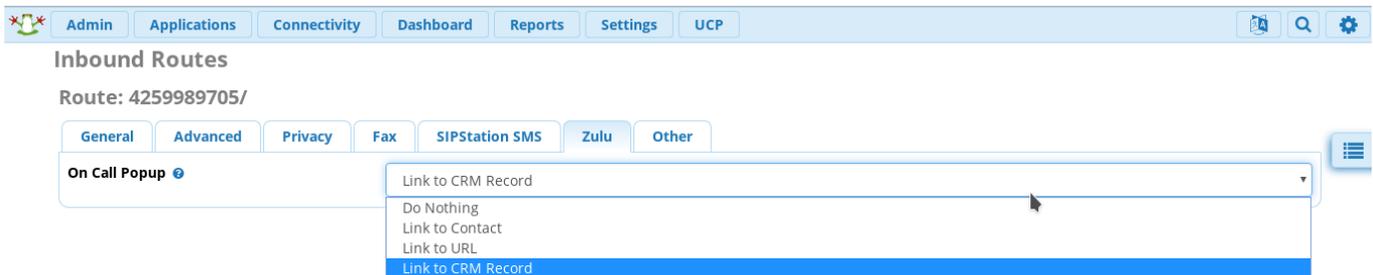
Finally, you must match your users from the PBX to Zoho users.

Go to Admin > User Management > Edit the user you want to match, go to CRM tab and match your PBX user with your Zoho user.



Additionally, if you use Zulu, you can choose to use "On Call Popup" option under your Inbound route or queues.

Go to Connectivity > Inbound Routes > Select your route > Zulu Tab



If you are using Zulu, then when you receive a call, a popup would be opened automatically pointing to the CRM or the chosen URL.

Create Contact [Edit Page Layout](#)

Cancel Save and New Save

Contact Information

Contact Owner	<input type="text" value="Sangoma CRMTesting Sangoma CRMTesti..."/>	Lead Source	<input type="text" value="-None-"/>
First Name	<input type="text" value="-None-"/>	Last Name	<input type="text"/>
Account Name	<input type="text"/>	Vendor Name	<input type="text"/>
Email	<input type="text"/>	Title	<input type="text"/>
Phone	<input type="text"/>	Department	<input type="text"/>
Other Phone	<input type="text"/>	Home Phone	<input type="text"/>
Mobile	<input type="text"/>	Fax	<input type="text"/>
Assistant	<input type="text"/>	Date of Birth	<input type="text" value="MM/DD/YYYY"/>