Enable integration with Zoho CRM

HappyFox integration with Zoho CRM lets you access your customer information from your HappyFox interface and also allows you to view tickets associated with Zoho CRM customers in the Zoho CRM interface itself. You would, however, need an active Zoho CRM subscription to enable this integration.

Who can enable this integration?

"Admin" of your HappyFox account can enable the integration with "Zoho CRM" by visiting Manage --> Integrations page.
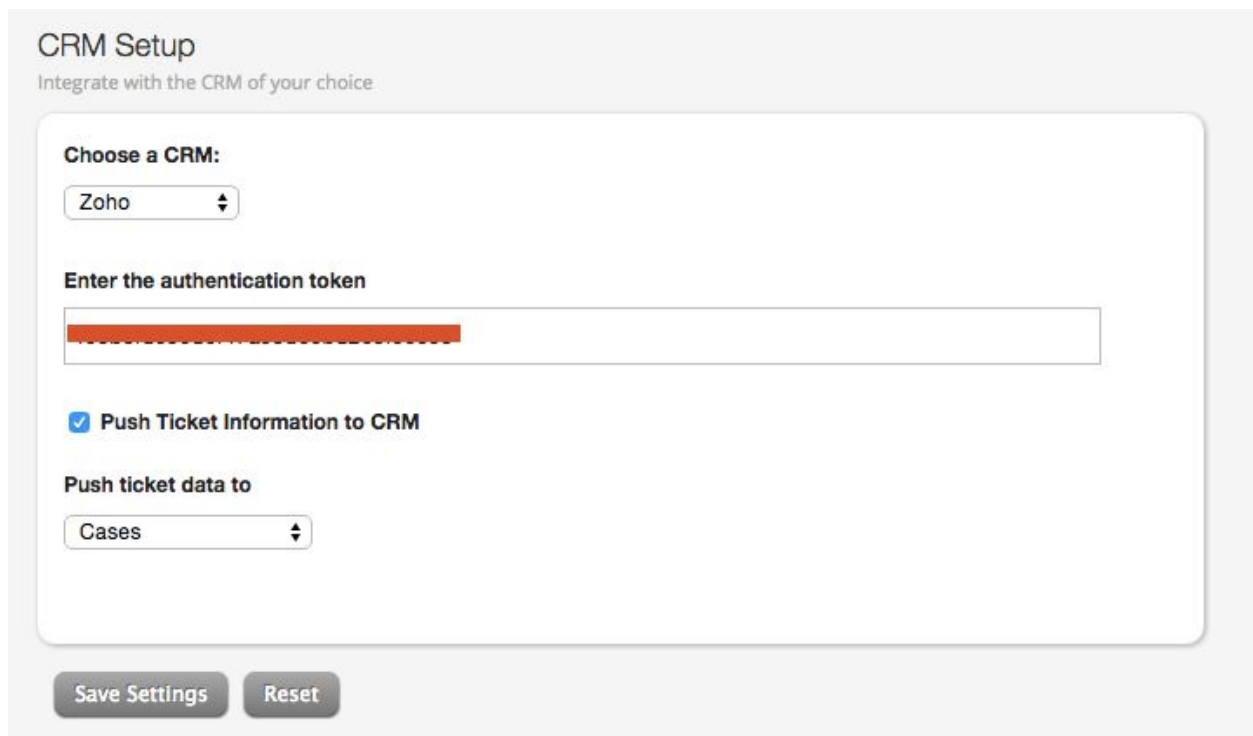
How to set up the integration?

To enable Zoho CRM integration with your HappyFox account, you can follow the steps below:

1. Get the API key from Integrations section in Zoho CRM

2. Go to Manage --> Integrations in HappyFox

3. Below the External section, click the Configure button near CRM Integration

4. Change CRM Integration Active option to "*Yes*"

5. Choose "*Zoho"* under Choose a CRM drop down

6. Enter the Authentication token provided by Zoho CRM

7. To push new tickets and updates to Zoho CRM, select the checkbox Push Ticket Information to CRM

8. Click "Save Settings"

Once this is done, a section "*Customer info from Zoho CRM*" appears in your ticket details page with your customer information from Zoho CRM displayed. You can also go to contact edit page of Zoho CRM by clicking the *Edit* link here.

Contact information from Zoho CRM will be displayed under "*Contact info from Zoho CRM*" section in the Contact Detail page of HappyFox, corresponding to the customer name and also in the HappyFox New Ticket form when searching for the contact that exists in Zoho CRM.

Contact Details

Basic Information edit merge   Reset Password Clone Delete

John Doe   2 Total Tickets   2 Pending Tickets
johndoe@example.com   View all   View all

main
555555555 🚩

Contact Info from Zoho CRM edit

Mailing Street   Phone   Last Name
123, Anywhere St   +21 345 678   Doe

Date of Birth   First Name   Account Name
1982-04-20   John   johnny

Mailing City
SF

Additional Information edit

cell num   Abcd   Requestor type   Open deal count
123445   1234   Residential   ~

ccf date
12 Aug 2015

HappyFox ticket details (ticket ID, status and subject of the ticket) show up as cases on Zoho CRM interface against the customer information.

Case List view in Zoho CRM:

Cases

	Subject	Case Reason	Email	Status	Priority	Type
Edit | Del	#SU00000143 - New - I would like to know your pricing			New		

New

Case Detail view in Zoho CRM:

#SU0000143 - New - I would like to know your pricing -   Created On : 03:39 PM

Product Name   :
Status   : New
Case Origin   : Elevenmiles
Case Owner   : Ken adams
Description   :
...

Notes

Add a Note...

Open Activities

No records found   New Task   New Event   Log a Call

Closed Activities

No records found