

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.

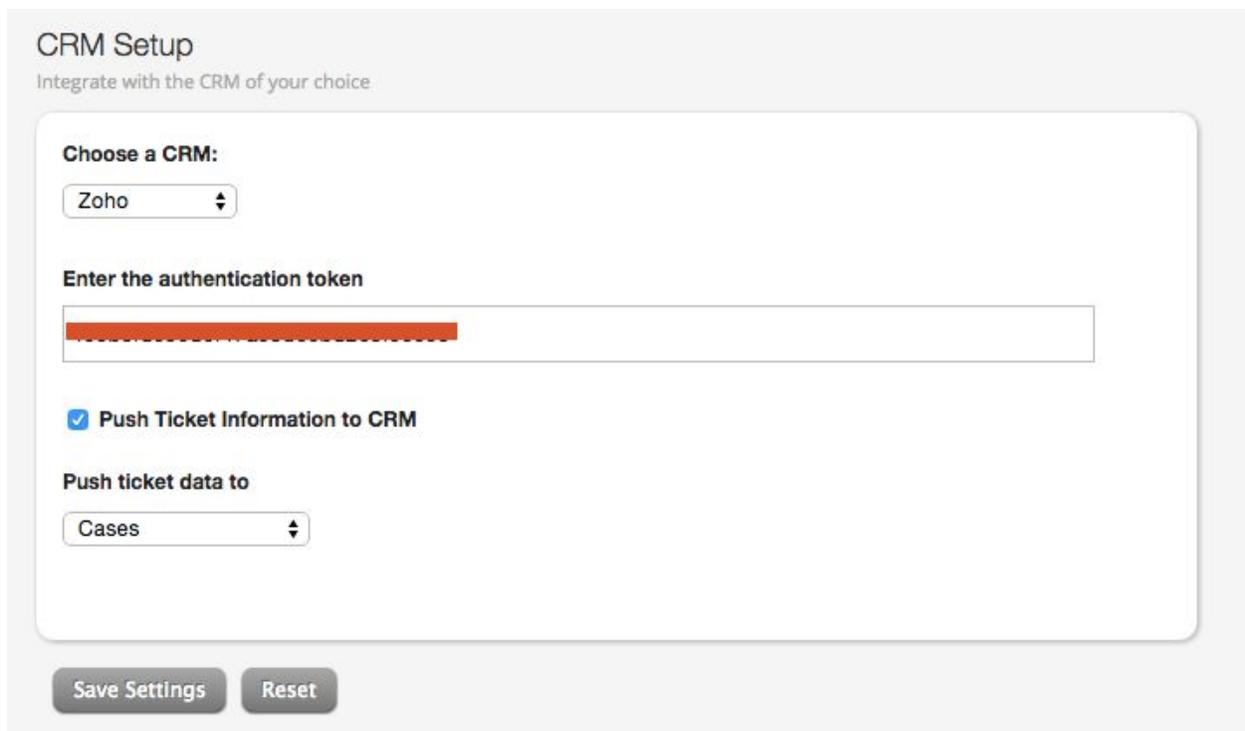
How to set up the integration?

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"



The image shows a 'CRM Setup' configuration page. At the top, it says 'CRM Setup' and 'Integrate with the CRM of your choice'. Below this is a section titled 'Choose a CRM:' with a dropdown menu set to 'Zoho'. Underneath is a section 'Enter the authentication token' with a text input field containing a redacted token. A checkbox labeled 'Push Ticket Information to CRM' is checked. Below that is a section 'Push ticket data to' with a dropdown menu set to 'Cases'. At the bottom of the form are two buttons: 'Save Settings' and 'Reset'.

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.

#SU0000143 **I would like to know your pricing (1)** last updated
2 seconds ago

NEW Hello, Please point me to your pricing page. Regards, John

assigned to ~ raised by John Doe priority Normal category Support due date: Not Set

Contact Information [edit](#) [change contact](#)

cell num 123445	Abcd 1234	Requestor type Residential	Open deal count ~	ccf date 12 Aug 2015
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Customer Details from Shopify

No information available

Additional Information [edit](#)

priority High	tcf date 12 Aug 2015
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Customer Info from Zoho CRM [edit](#)

Mailing Street 123, Anywhere St	Phone +21 345 678	Last Name Doe	Date of Birth 1982-04-20	First Name John	Account Name johnny
Mailing City SF					

Messages [Expand All](#)

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

[johndoe@example.com](mailto: johndoe@example.com)

2 Total Tickets
[View all](#)

2 Pending Tickets
[View all](#)

main
555555555 🇺🇸

Contact Info from Zoho CRM [edit](#)

Mailing Street
123, Anywhere St

Phone
+21 345 678

Last Name
Doe

Date of Birth
1982-04-20

First Name
John

Account Name
johnny

Mailing City
SF

Additional Information [edit](#)

cell num
123445

Abcd
1234

Requestor type
Residential

Open deal count
~

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





Open Activities

No records found [New Task](#) [New Event](#) [Log a Call](#)

Closed Activities

No records found