

Zoho connection with ROGER365.io



Written by Erwin Wiegman

Version 1.0



Index

High-level overview of the steps	3
Create a Zoho API self client.....	4
Get the domain for Zoho.....	7
Get your Zoho CRM URL.....	8
Create the ROGER365.io replicator.....	9



High-level overview of the steps

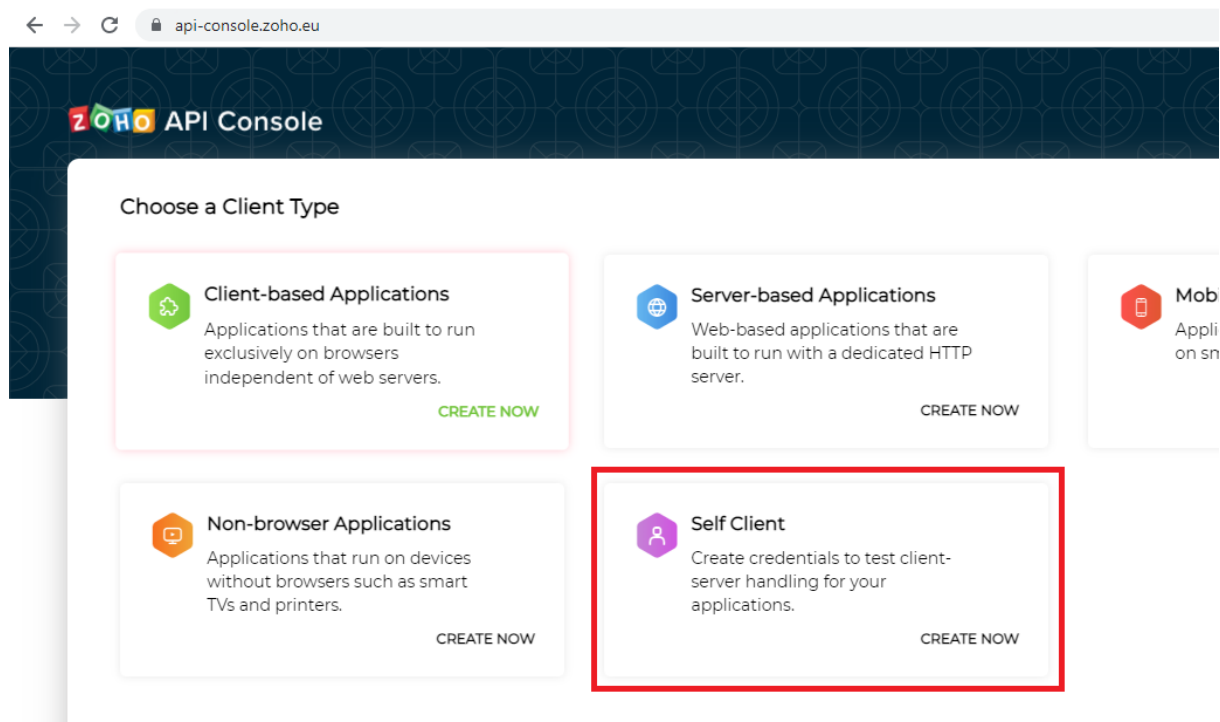
The connection is made through the Zoho API. The Zoho API authorization needs to be authorized.

- 1) Create a Zoho API Self client
- 2) Authorize Zoho API connection
- 3) Configure ROGER365.IO

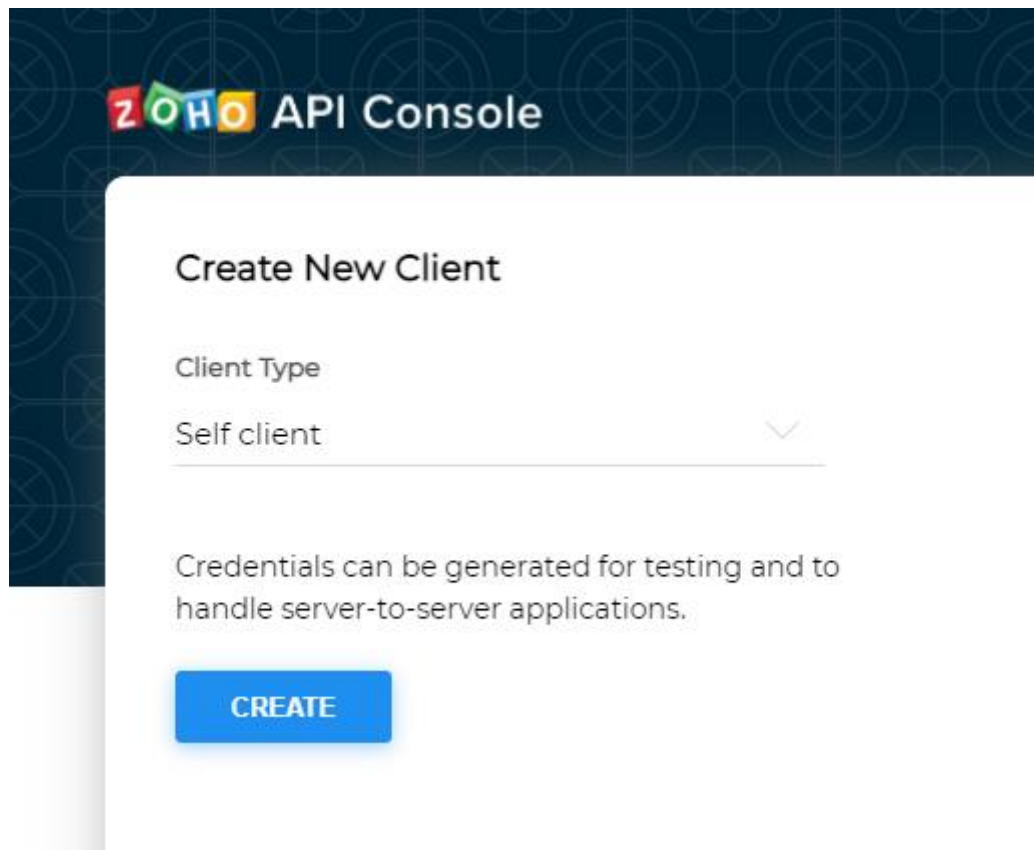
Create a Zoho API self client

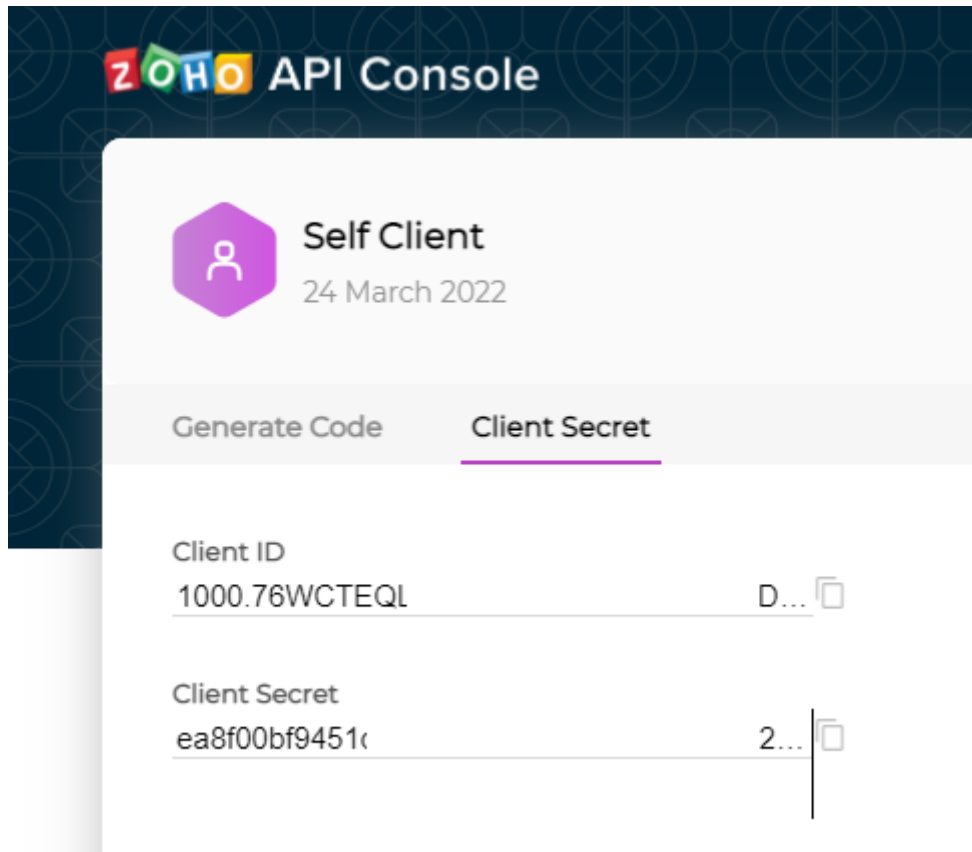
You can create a self client to Zoho this can be done in the API section of Zoho.

Login to <https://api-console.zoho.com/>



Choose Self Client

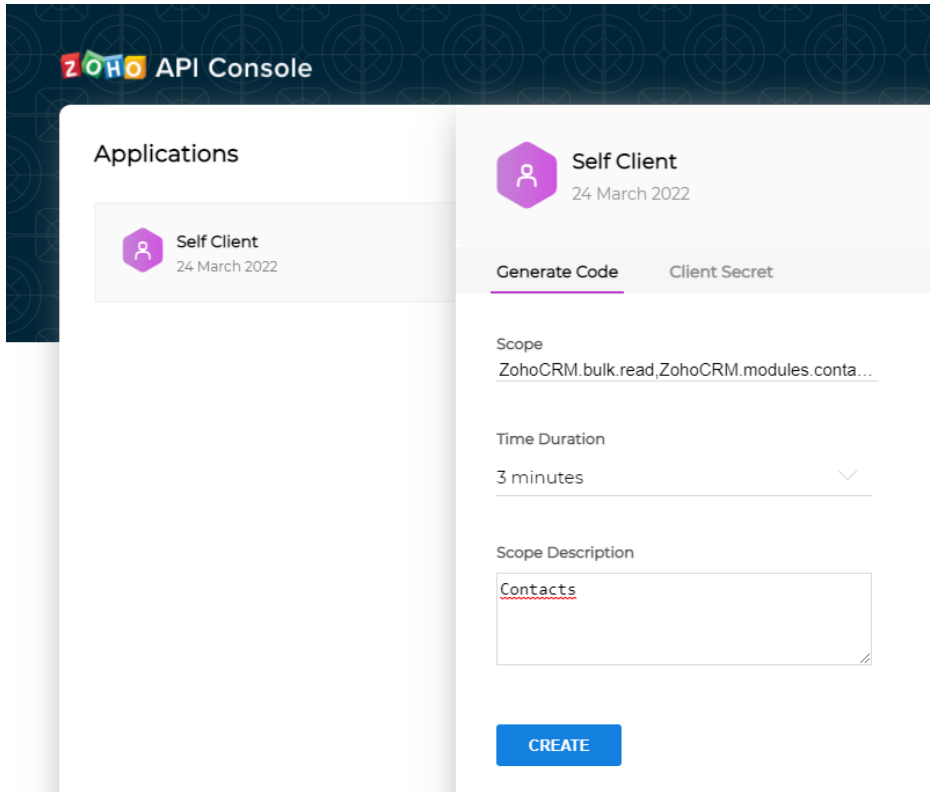




Copy the Client ID and Client Secret to notepad. We need this in the ROGER365.io portal later on.

Choose the generate code option and fill in the scope of the api client. This gives the API the rights to actually get the data we want to replicate to ROGER365.io

Entity Type	Zoho rights
Contact	ZohoCRM.bulk.read,ZohoCRM.modules.contacts.READ
Accounts	ZohoCRM.bulk.read,ZohoCRM.modules.accounts.READ



Zoho API Console

Applications

Self Client
24 March 2022

Self Client
24 March 2022

Generate Code **Client Secret**

Scope
ZohoCRM.bulk.read,ZohoCRM.modules.conta...

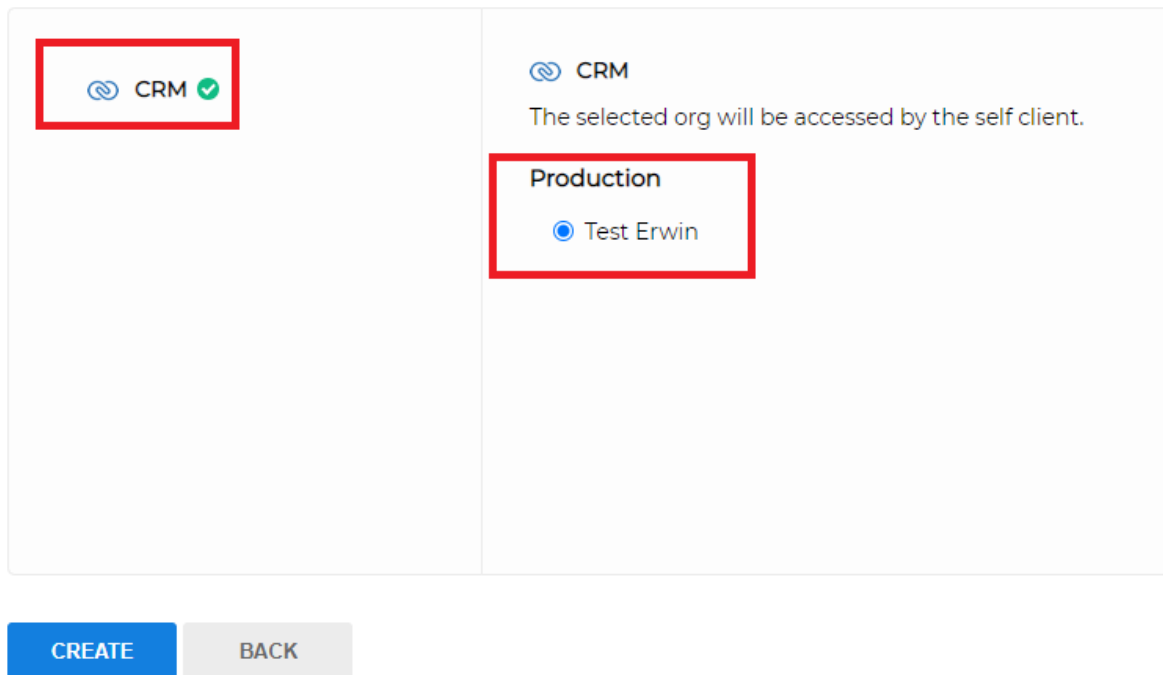
Time Duration
3 minutes

Scope Description
Contacts

CREATE

Fill in the Zoho rights for the entity type you prefer. In this manual we will choose the contact entity Zoho rights and press create. Next we have to connect this to a Zoho instance.

Select Portal



 CRM 

 CRM

The selected org will be accessed by the self client.

Production

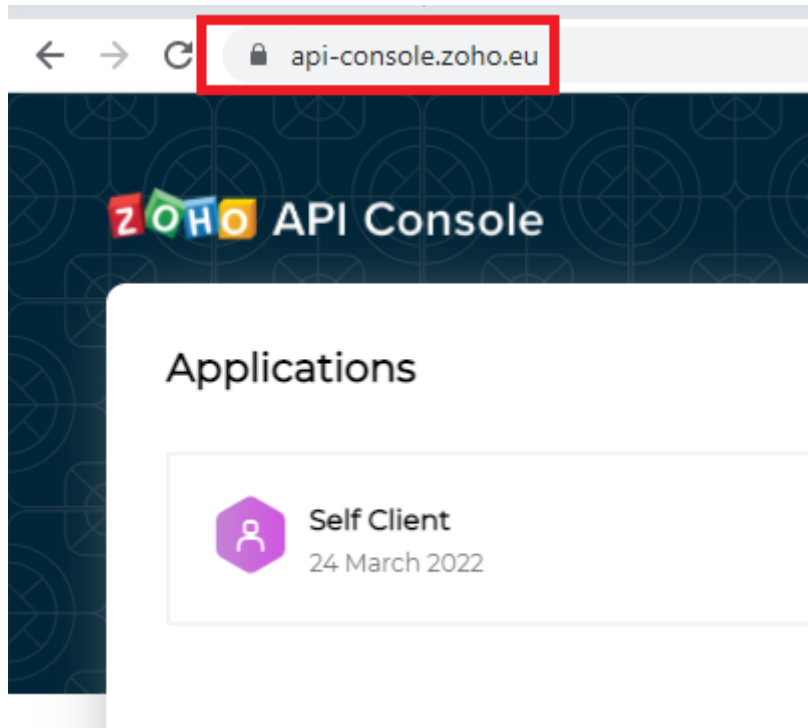
☒ Test Erwin

CREATE **BACK**

Choose your CRM and the instance and press create.

Get the domain for Zoho

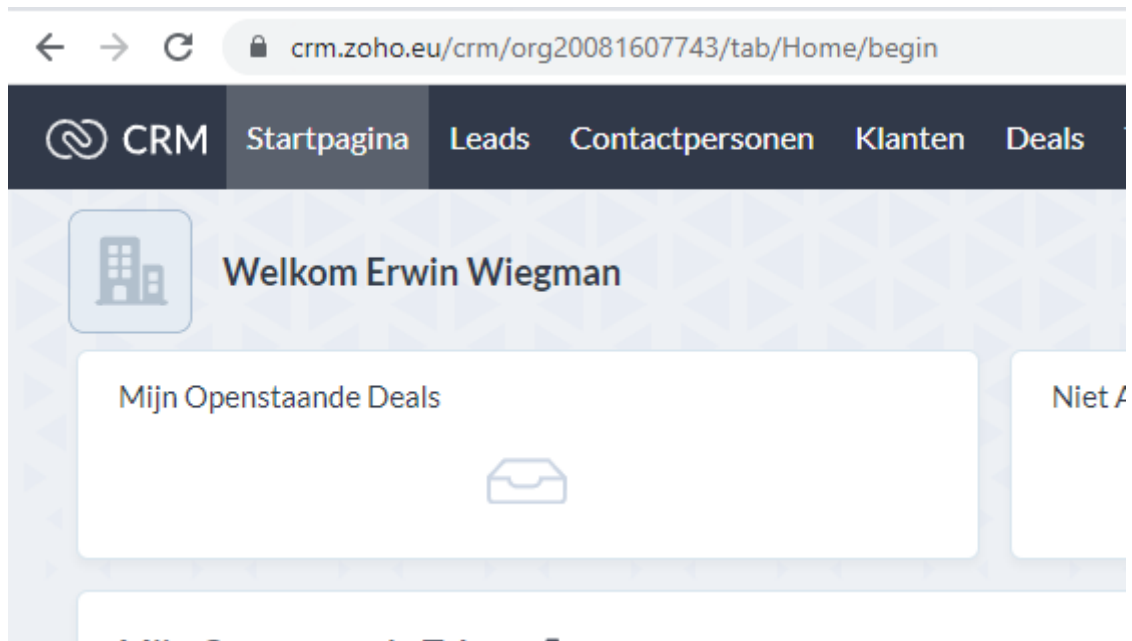
Zoho has different domains where their data is stored. We need this information to make connect to the right platform for retrieving your data. You can determine your zoho domain on the following way.



You can see the domain in the URL. In the URL in the picture this is EU because the URL ends with .eu

Get your Zoho CRM URL

You also need to retrieve your Zoho CRM URL. This can be done by logging into Zoho and going to the CRM module. You can copy the URL.

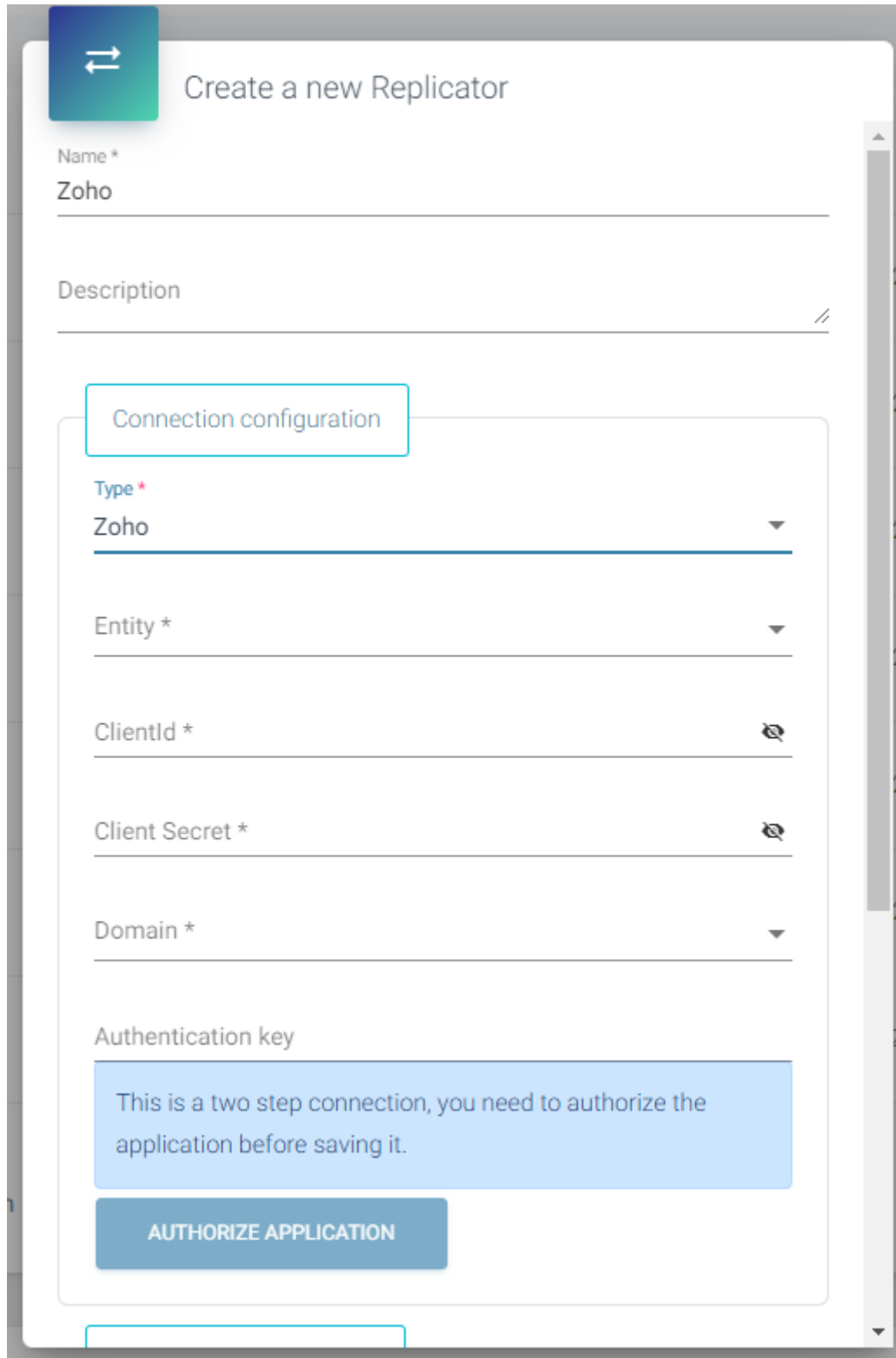


You don't need the entire URL in the example above; you only need the <https://crm.zoho.eu/crm/org20081607743> part.

Create the ROGER365.io replicator

After the Self client is created in the Zoho portal, we can create the replicator. Go to <https://admin.roger365.io> and login. After login go to the CRM replicator menu item and click on the add replicator button.

The new replicator window open, choose the Zoho type.

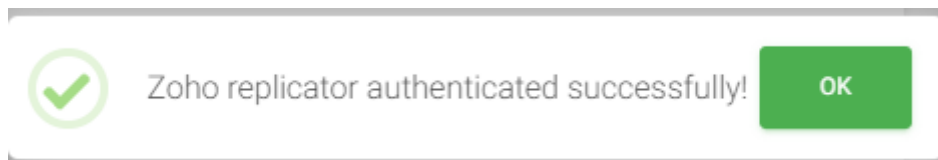


The screenshot shows the 'Create a new Replicator' window. At the top left is a blue square icon with a white double-headed arrow. The title 'Create a new Replicator' is in a light gray font. Below the title are two input fields: 'Name *' with the value 'Zoho' and 'Description' which is empty. A 'Connection configuration' section is highlighted with a blue border. Inside this section, there are five fields: 'Type *' with a dropdown menu showing 'Zoho', 'Entity *' with a dropdown menu, 'ClientId *' with a text input and an eye icon, 'Client Secret *' with a text input and an eye icon, and 'Domain *' with a dropdown menu. Below these fields is an 'Authentication key' section. A blue box contains the text: 'This is a two step connection, you need to authorize the application before saving it.' Below this box is a blue button labeled 'AUTHORIZE APPLICATION'.

Setting	Value
Entity	Contact or Accounts, should be the same as the Zoho rights which are chosen in the API config
ClientId	ClientId from Zoho API config
ClientSecret	ClientSecret for Zoho API config
Domain	Pick the domain where you Zoho instance is hosted
Authentication key	Key which you got from the Generate code section when setting the Zoho API config

When these items are filled, you have to press the Authorize Application button. This should be done within 3 minutes after generating the Zoho Authentication Key. Else you have to create do the generate code step again in the Zoho portal.

When the authorization is done correctly a message is shown indicating that the authorization is successful.



After this we can configure the rest of the replicator to finish the replicator. Choose your preferred synchronization interval and for the Contact Url you use the following table to determine its value

Entity	Value
Contacts	https://crm.zoho.eu/crm/{YOURORG}/tab/Contacts/{SourceId}
Accounts	https://crm.zoho.eu/crm/{YOURORG}/tab/Accounts/{SourceId}