Alchemer Workflow Zoho CRM Integration

The Alchemer Workflow Zoho CRM Integration is available for purchase as an add-on. If you are interested in purchasing, please contact us for more information.

Overview

With the Zoho CRM Integration for Alchemer Workflow there are two integration actions:

- Get Contact: Pull in information from a contact record into your workflow.
- Update Contact: Update a contact record with information from your workflow.

These integration actions enable you to personalize workflow steps in Alchemer using information from your Zoho CRM or facilitates new customer insights by bringing customers feedback into your contact records.

Integration Setup

1. Create a Workflow in Alchemer and select your initiator.

For more information on building Workflows in Alchemer refer to the following documentation:

- Getting Started with Alchemer Workflow
- Building a Workflow

2. When you are ready to add the Zoho CRM step to your Workflow, drag the Zoho step from the Step Library under Connections.

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3. Click the pencil icon to configure your Zoho CRM integration step.

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4. Select the integration action you'd like to use.

- Get Contact: Pull in information from a Zoho contact into your Workflow. Click this link for specific guidance on this integration action.
- Update Contact: Update a Zoho contact record with information from your Workflow. Click this link for specific guidance on this integration action.

Zoho CRM | Get Contact

To configure this integration, you will need:

- Your Zoho login information
- Fields in the workflow that will be used to find your Zoho contact.

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1. After selecting Get Contact, click "Next".

Configure Integration			
PRIMARY SETUP			
< Back			
Select Action			
Select the action you would like	e to perform.		
Get Contact Get Contact from Zoho CRM	Update Contact Update Contact in Zoho CRM		
			Cancel Next

2. Click "Next" on the integration overview screen.

Configure Integration	
PRIMARY SETUP	
Zoho CRM Get Contact Get fields from a contact in Zoho CRM.	
 You will need: Your Zoho login information. Fields in the workflow that will be used to find your Zoho contact. 	
Need help? <u>Learn more</u> v240913	
• • • •	Previous Next

3. Click "New Authentication" and then name your authentication.

Configure Integration					
PRIMARY SETUP					
Zoho CRM Authentication Connect to y You will be c Your authentication name		>	×		
Zoho PROI			····		
	Previous	Create ,			
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4. In the Zoho window that appears, provide your Zoho credentials. When done, complete the authentication in Alchemer.

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accounts.zoho.com/signin?	servicename=AaaServer&serviceurl=https%3A%2F
	Try smart sign-in
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Sign in using	
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5. Select the field in the Workflow that you want to use to find the specific contact record in Zoho. Contact email will often make the most sense, but you can use any of the other fields listed in the drop-down list.

You can only use one field to search for the contact.

Configure Integration	
PRIMARY SETUP	
Zoho CRM Find the Zoho Contact We need to find the specific contact to update when the workflow runs. Match this Alchemer field value to a value in this	Zoho field
Step 0 Survey Listener Questions - Customer Satis Zoho Conta	
Add a new mapping	
	•
	Previous

6. Click "Save" to complete integration setup.

Configure Integration				
PRIMARY SETUP				
Zoho CRM Setup Complete A log of each run result can be found in the Individual Responses > Action Log.				
All of the contact fields will be available in the workflow as merge codes.				
5 •	Previous	Save		

Now what / Where is my data?

All of the information from this integration is now available in this workflow and all surveys in this workflow. You can use them to:

- Add Merge Codes to Email or Survey Invite steps.
- Use with Logic in the workflow.

• Use to personalize the survey in the workflow.

Zoho CRM | Update Contact

To configure a Zoho CRM Update Contact integration step you will need:

- Your Zoho login information.
- Fields in this workflow that will be used to find your Zoho contact.
- Fields in this workflow that contain the data you want to use to update the Zoho contact

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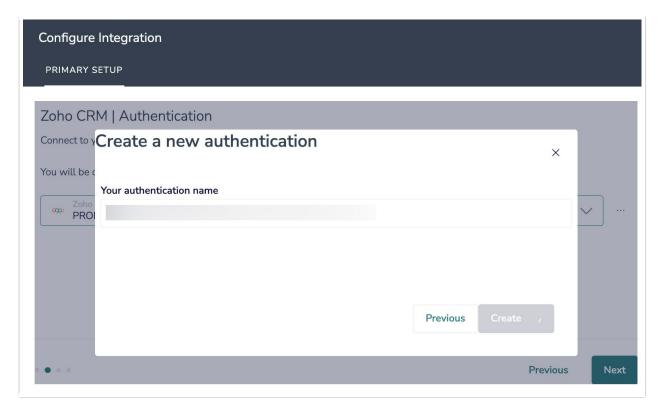
1. After selecting Update Contact, click "Next".

Configure Integration			
PRIMARY SETUP			
🕻 Back			
Select Action			
elect the action you would lik	e to perform.		
Get Contact Get Contact from Zoho CRM	Update Contact Update Contact in Zoho CRM		
			Cancel

2. Click "Next" on the integration overview screen.

Configure Integration		
PRIMARY SETUP		
Zoho CRM Update Contact Update contact fields within a contact in Zoho CRM.		
 You will need: Your Zoho login information. Fields in this workflow that will be used to find your Zoho contact. Fields in this workflow that contain the data you want to use to update the Zoho contact. 		
Need help? <u>Learn more</u> v240913		
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3. Click "New Authentication" and then name your authentication.



4. In the Zoho window that appears, provide your Zoho credentials. When done, complete the authentication in Alchemer.

	Zoho Accounts
accounts.zoho.com/signin?	servicename=AaaServer&serviceurl=https%3A%2F
	Try smart sign-in
Sign in	
to access Accounts	
Email address or mobile	e number
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Sign in using	
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5. Select the field in the Workflow that you want to use to find the specific contact record in Zoho. Contact email will often make the most sense, but you can use any of the other fields listed in the drop-down list.

You can only use one field to search for the contact.

Configure Integration			
PRIMARY SETUP			
Zoho CRM Find the Zoho Contact We need to find the specific contact to update when the workfl Match this Alchemer field value	low runs. to a value in this Zoho field		
Step 0 Survey Listener Questions - Customer Satis V	Zoho Contact Email	~	Ŵ
Add a new mapping			
			_
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6. Select the data you want to use to update the Zoho contact record.

Configure Integration			
PRIMARY SETUP			
Zoho CRM Update Zoho Contact Choose the workflow data you want to use to update specific fiel Use data from this Alchemer field Step 0 Survey Listener Questions - Customer Satisfa Add a new mapping	ds in your Zoho contact. To update this Zoho field Zoho Contact Home Phone		 > ÎÛ
		Previous	Next

7. Click "Save" to complete the integration setup.

Configure Integration

PRIMARY SETUP

Zoho CRM | Setup Complete

A log of each run result can be found in the Individual Responses > Action Log.

Information about the run are also available as merge codes in the workflow.

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Now what / Where is my data?

All of the information from this integration is now available in this workflow and all surveys in this workflow. You can use them to:

Save

Previous

- Add Merge Codes to Email or Survey Invite steps.
- Use with Logic in the workflow.
- Use to personalize the survey in the workflow.

FAQs

What permissions do I need within Alchemer to set-up and use the Zoho integration?

This integration doesn't fit my use cases, or I want to provide feedback to the Alchemer Product Team!

Related Articles