

# 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

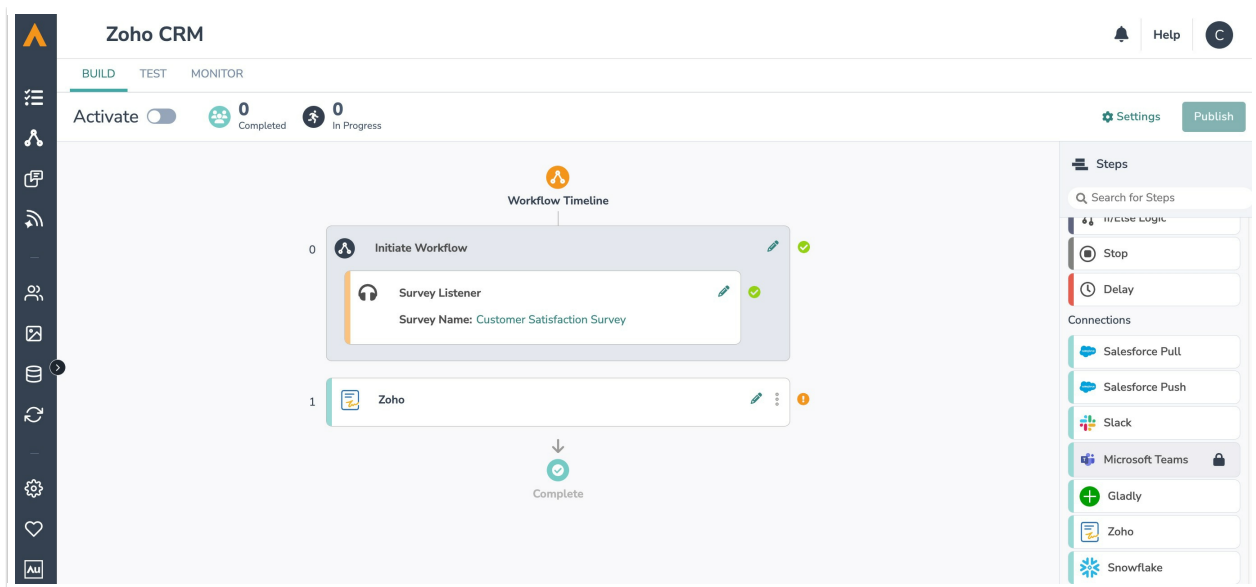
1. Create a Workflow in Alchemer and select your initiator.

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

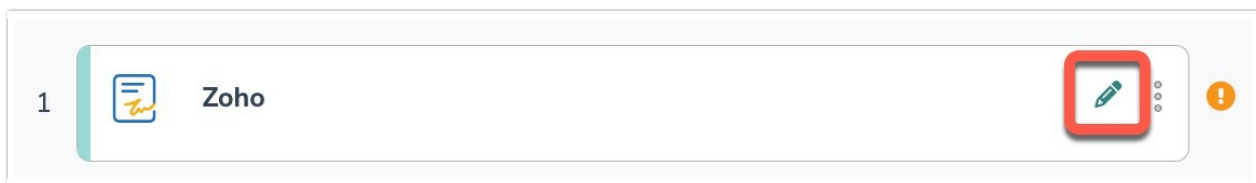
- [Getting Started with Alchemer Workflow](#)
- [Building a Workflow](#)

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.



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 to perform.

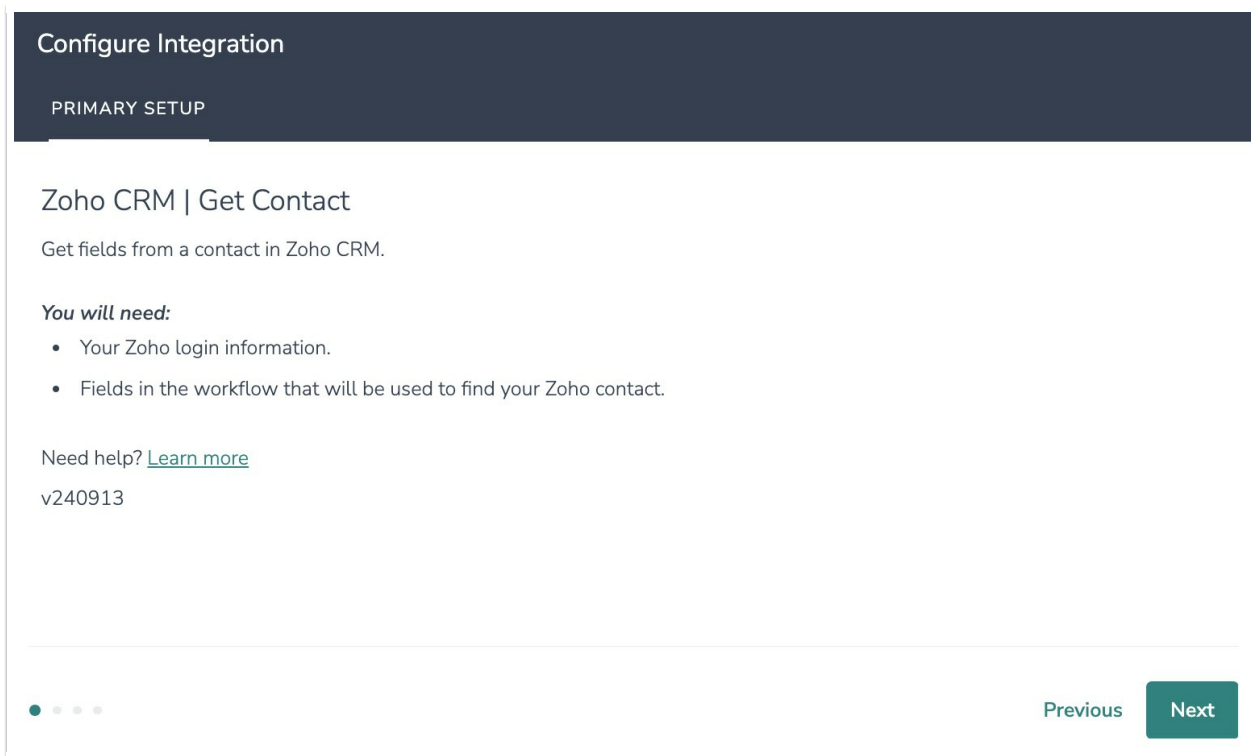
**Get Contact**  
Get Contact from Zoho CRM

**Update Contact**  
Update Contact in Zoho CRM

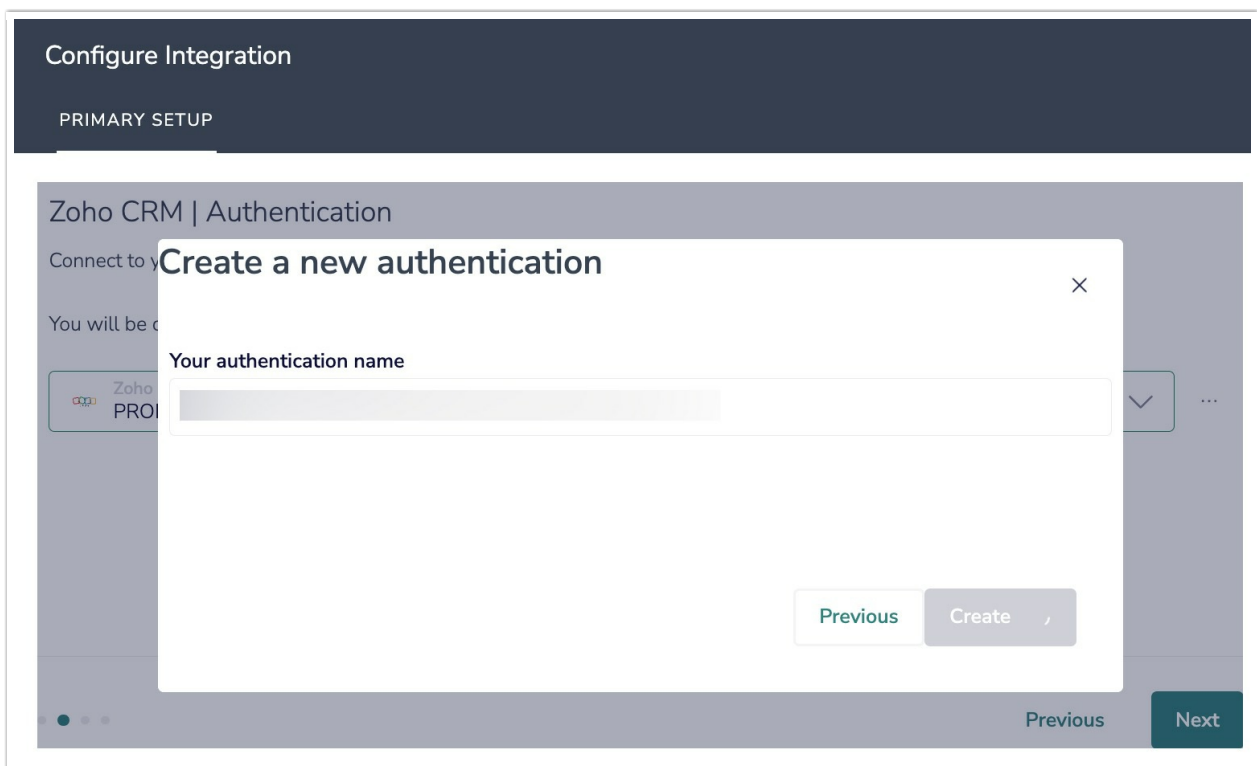
Cancel Next

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

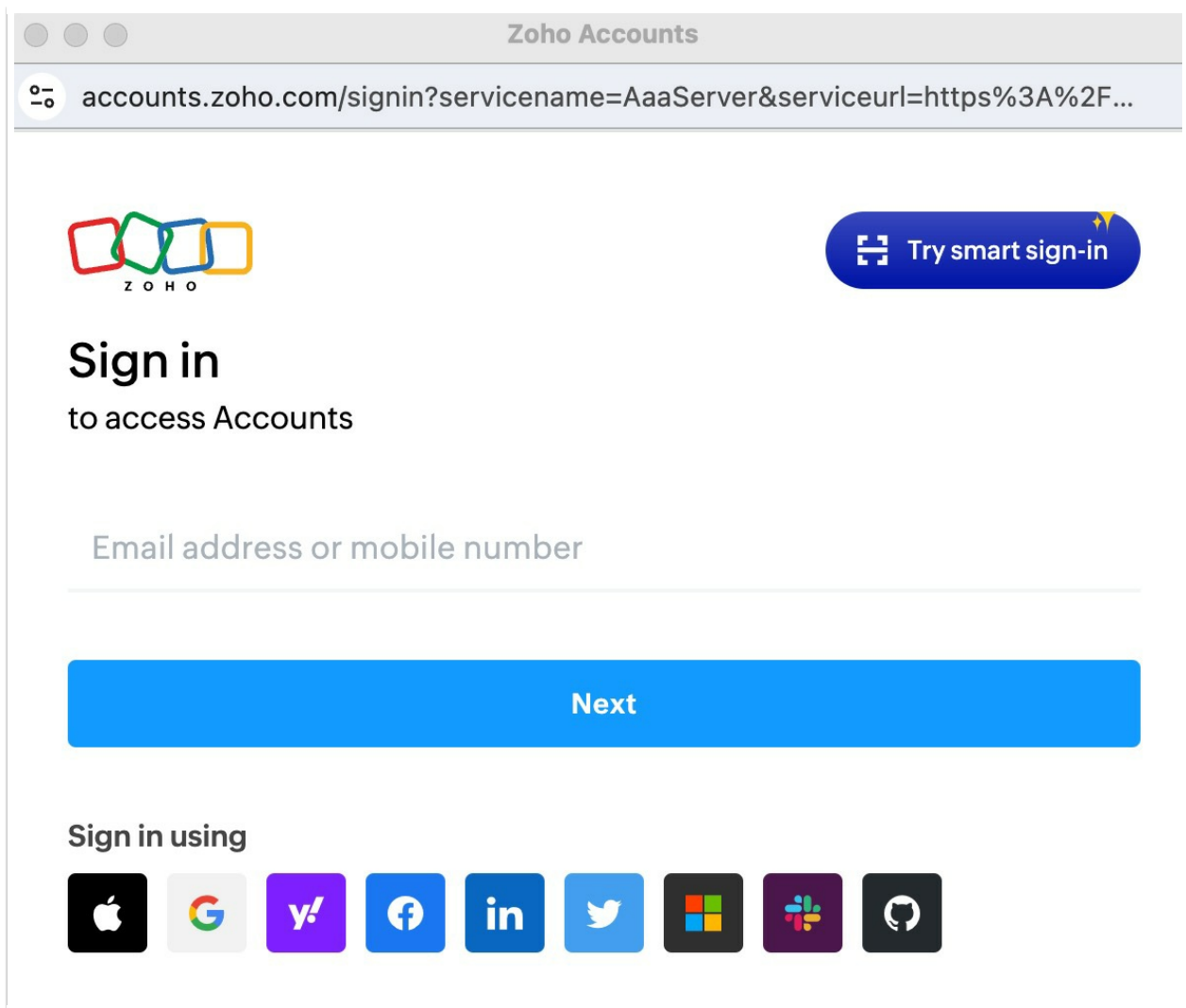
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3. Click "New Authentication" and then name your authentication.



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



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 | Contact | Email ▾ 🗑️

Add a new mapping

⋮ Previous Next

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.

⋮ 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.
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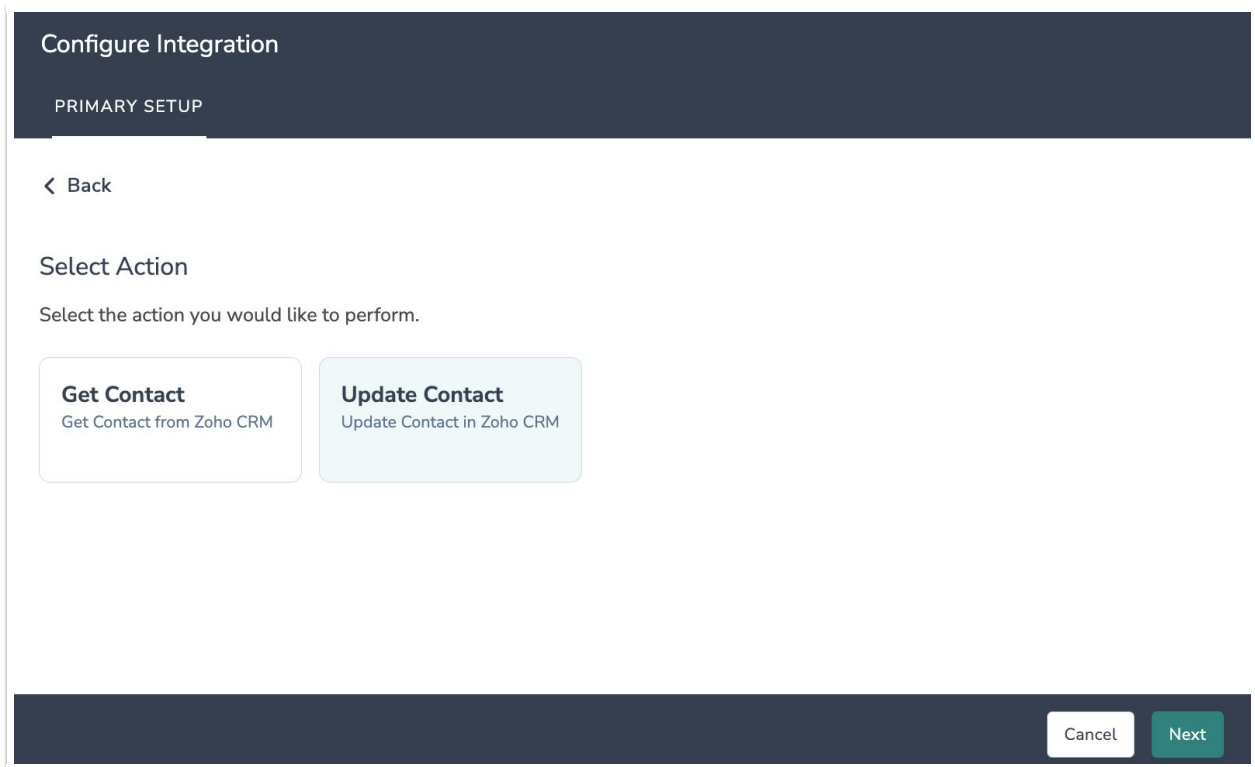
## Zoho CRM | Update Contact

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

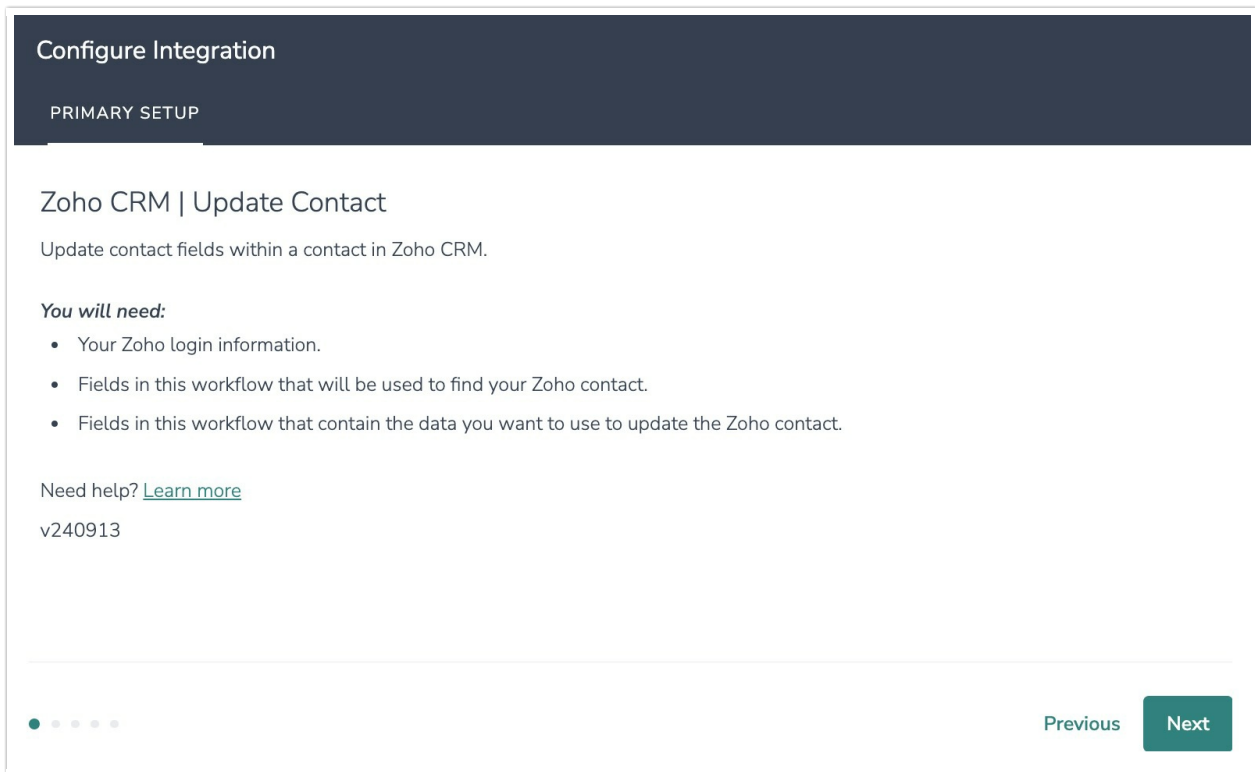
- Your Zoho login information.
- Fields in this workflow that will be used to find your Zoho contact.
- Fields in this workflow that contain the data you want to use to update the Zoho contact

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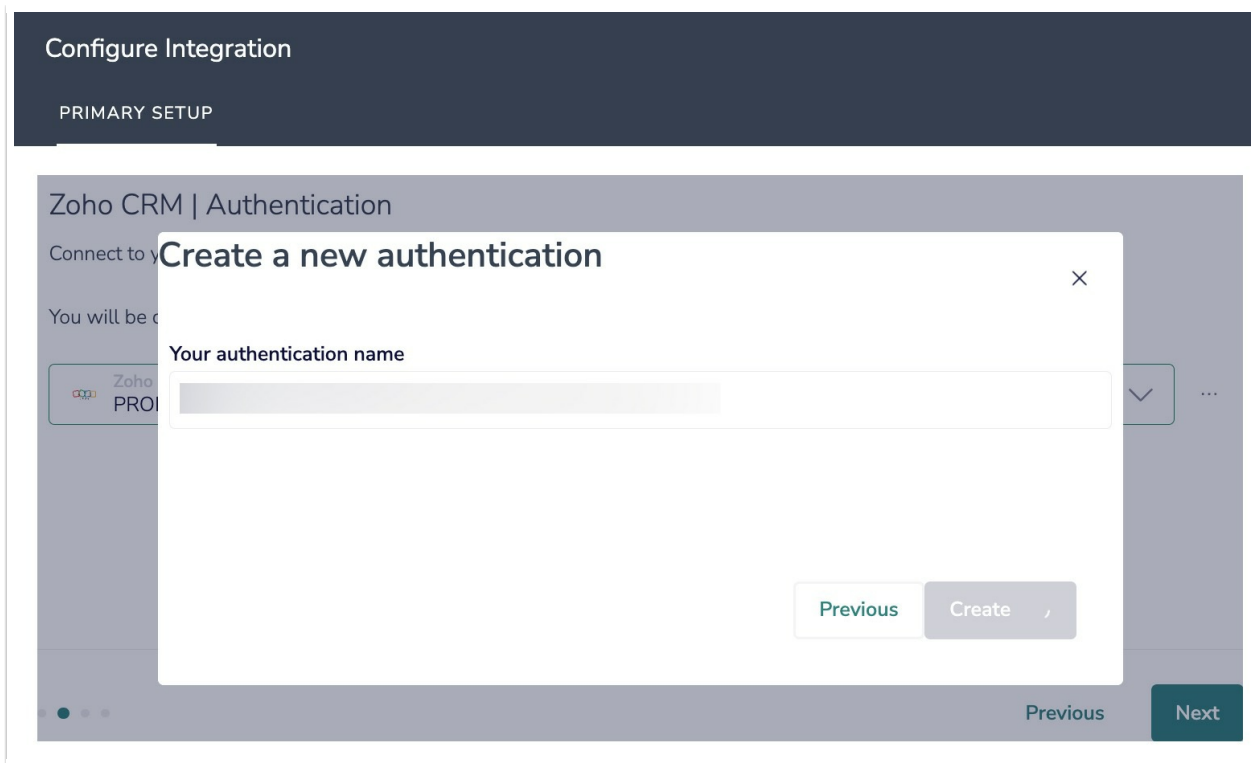


2. Click "Next" on the integration overview screen.

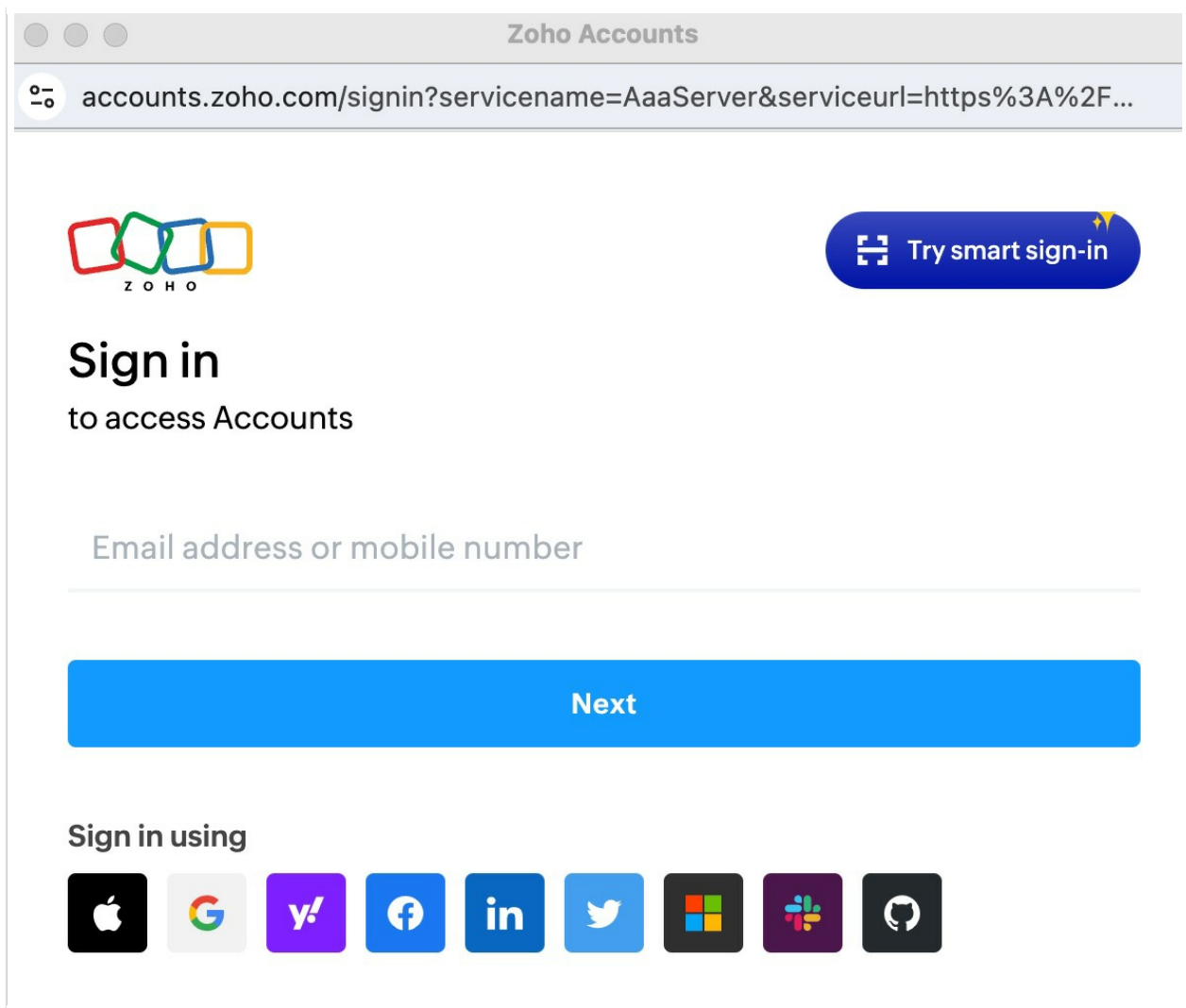


3. Click "New Authentication" and then name your authentication.





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



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 | Contact | Email 🗑️

Add a new mapping

⋮ Previous Next

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 fields in your Zoho contact.

Use data from this Alchemer field To update this Zoho field

Step 0 | Survey Listener Questions - Customer Satisfa... Zoho | Contact | Home Phone 🗑️

Add a new mapping

⋮ 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.



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.

## 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