zoho.crm

This shortcode is used to interact with Zoho CRM module. To use zoho.crm shortcode, you'll require the Zoho CRM Authentication Token from your CRM account. To generate Authentication Token, check https://www.zoho.com/crm/help/api/using-authentication-token.html for details.

Best way to set auth token within Awesome Studio is to use ZOHO API settings panel from catalogue. With zoho.crm you can fetch, insert and updates leads, potential all other modules within Zoho CRM module.

You must pass the required parameters for respective Zoho CRM API method for it to work.

attributes:

- **main: *module_name.api_method***

  zoho.crm supports all the api methods mentioned on https://www.zoho.com/crm/help/api/api-methods.html for all the modules mentioned in https://www.zoho.com/crm/help/api/modules-fields.html. The general format for calling Zoho CRM API method is specify the Module name say '*Leads*' and API method name like '*getRecords*' as '*Leads.getRecords*' similarly for say Accounts module it would become '*Accounts.getRecords*'. Using this format you can call any API method.

- **authocde:**

  While ideally you should use ZOHO API Settings Panel from catalogue to set the authcode globally, you can also specify authcode to shortcode directly.

- **id/newFormat/wfTrigger/toIndex etc.:**

  Different Zoho API methods may require different parameters to work effectively, you can specify them as attributes to the shortcode, eg *id="12727727?* or *toIndex="100?*. Check the documentation of specific API method for detail list of supported parameters.

insertRecords/updateRecords:

When inserting or updating records in Zoho CRM, you specify the fields and it's values as JSON key value pair to zoho.crm shortcode. To specify multiple records, you need to specify "rows" key within the JSON, see examples.

Examples of using zoho.crm to get records:

In the example below we are getting 50 latest leads, Potentials and Contacts. The results are set in module.results, which you can loop using aw2.loop shortcode.

```
[zoho.crm Leads.getRecords toIndex="50" set="module.results"/]

[zoho.crm Leads.getRecords toIndex="50" lastModifiedTime="2014-05-21 20:05:40" set="module.results"/]

[zoho.crm Leads.getRecords toIndex="50" lastModifiedTime="2014-05-21 20:05:40" set="module.results"/]

[zoho.crm Potentials.getRecords toIndex="50" lastModifiedTime="2014-05-21 20:05:40" set="module.results"/]

[zoho.crm Contacts.getRecords toIndex="50" lastModifiedTime="2014-05-21 20:05:40" set="module.results"/]
```

Examples of using zoho.crm to insert records:

In this example we are inserting single record in Leads module.

```
[zoho.crm Leads.insertRecords wfTrigger=true set="module.results"]
{
  "Last Name":"Singh",
  "Company" :"WPoets Technology",
  "Mobile" : "0899999999"
}
[/zoho.crm]
```

In this example we are inserting multiple records in Leads Module

```
[zoho.crm Leads.insertRecords set="zoho.Leads"]
{
  "row":[
 {
        "First Name":"Amit",
  "Last Name":"Singh",
  "Company":"WPoets",
  "Email":"amit@wpoets.com"
 },
 {
  "First Name":"Aniruddha",
  "Last Name":"Prabhune",
  "Company":"WPoets",
  "Email":"ani@wpoets.com"
 }
 ]
}
[/zoho.crm]
```

In both the above example you can replace “Leads” with any other module like “Contacts” or “Potentials” to insert records in them.