VERTIFY

Zoho Setup Guide

This document outlines the required initial setup steps in the external system for the Vertify integration.

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SETUP GUIDE OVERVIEW

This setup guide will require the system administrator to complete steps outlined below in order to connect the external system application with Vertify.

Please note, this document may be subject to change and additional information required. Partnership with system administrator and/or support team may be necessary.

OPTIONAL STEP: ZOHO VERTIFY USER ACCESS

Please create an Admin user for the integration and provide the following credentials to your Vertify Implementation Specialist if you'd like them to have access to your CRM's UI. It is preferred that users are created with an Administrator role to ensure that no permissions errors are encountered during the implementation.

Follow this format when creating the log in: passwords+clientname@vertify.com

Example: passwords+vertify@vertify.com

If license/seat is unavailable, it can also be created through a personal account. Please note, it will need to be updated if the user or password is inactivated.

STEP 1: CUSTOM FIELD CREATION

Custom fields are required in the endpoint system for the Vertify integration. Please create these fields on any tables or objects such as Leads, Contacts, or Accounts. Reference the API Name column in the table below for the list of how to title the fields, the needed data type, and the purpose of the field for context.

API Name	Data Type	Purpose
ExternalContactId	String	This field will be used to house the source Contact's internalId, and for merging and lookup purposes in Vertify.
ExternalCompanyId	String	This field will be used to house the source Company's internalId, and for merging and lookup purposes in Vertify.
SyncToVertify	Boolean	This field will be hard-coded by Vertify or by a workflow in Zoho. It is used to determine which records are eligible to move back to the other endpoint(s) and for filtering in Vertify.

STEP 2: REGISTER A CLIENT IN ZOHO

Refer to the steps outlined below to generate the credentials needed in Zoho. Admin access in Zoho and Postman or a similar API platform will be needed. Alternatively, you're welcome to schedule a working session to partner with your Vertify Integration Specialist on the steps below.

Action Item: Please note the **Client ID** and **Client Secret** that will be generated during this step in a separate document, such a text editor or notepad. You will need these when connecting with Vertify in Step 3 below.

Click the link below to see the steps to walk through the steps to register the account and generate the credentials needed via Zoho's documentation, here - https://www.zoho.com/crm/developer/docs/api/v2/register-client.html

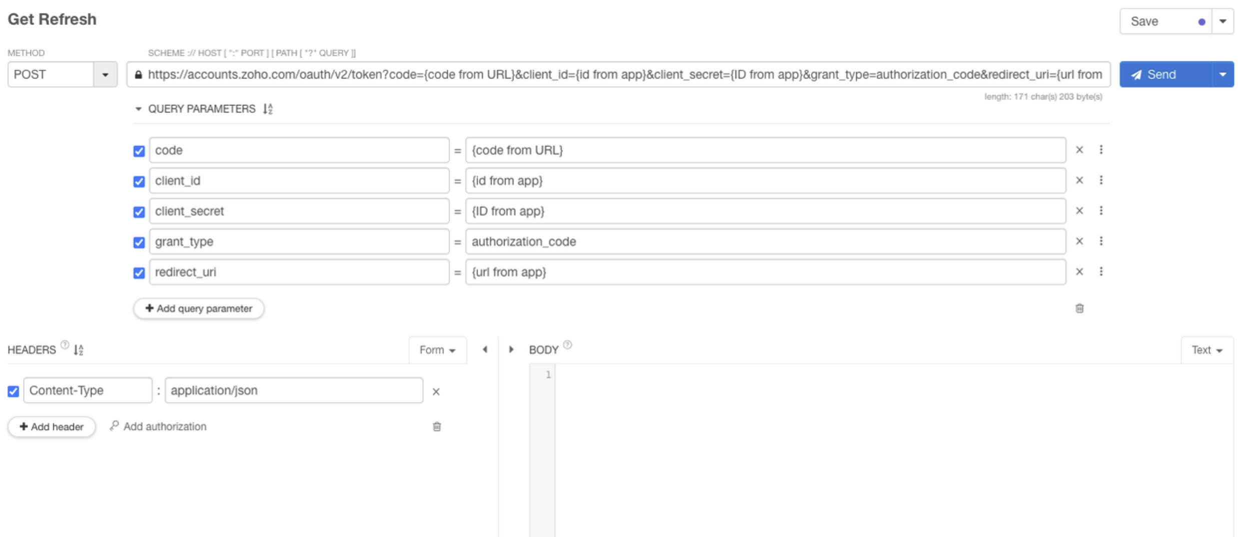
1. Click on Zoho Developer Console link
   a. Login
   b. Confirm registration
   c. Click Get Started

2. Next, click into Server Based Applications
   a. **Client Name:** Add a unique Client Name [i.e., Vertify Integration]
   b. **Homepage URL:** www.[companyname].com
   c. **Authorized Redirect URLs:** https://www.[companyname].com/callback
   d. Click **Create**
   e. Copy/paste the **Client ID** and **Client Secret** in a separate document and save for next steps.

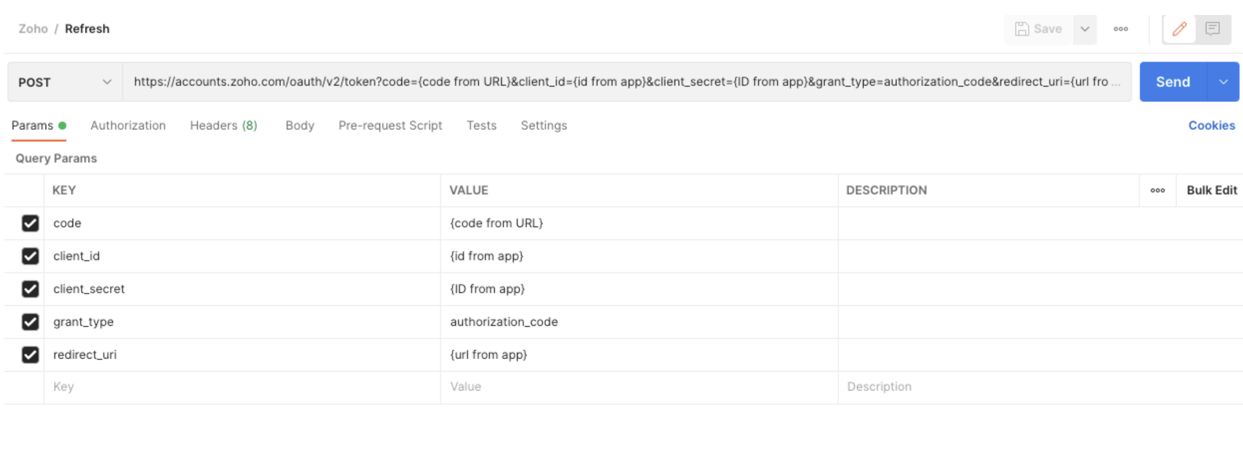
3. Fill in the client id and the company name in the highlighted text fields link below. Then, copy the URL string and paste in a new browser window.
   a. https://accounts.zoho.com/oauth/v2/auth?**scope=ZohoCRM.users.ALL,ZohoCRM.modules.ALL,ZohoCRM.settings.ALL**&client_id=[xxxxxxx]&response_type=code&access_type=offline&redirect_uri=https://www.[companyname].com/callback
   b. Next, click **Accept**
   c. Then, copy the URL in the browser window to grab the authorization code (i.e., we'll need everything after the /callback?code=)
   d. The correct code will return two tokens in the API call, an access_token AND a refresh_token. If you only get one, the code provided is incorrect.

4. Make an API call using the grant code to get the refresh token - this needs to happen immediately after access is granted as it is only valid for two minutes
   a. You basically just plug the code you get and the other values into this call and hit send from Talend API tester or Postman
   b. POST https://accounts.zoho.com/oauth/v2/token?code={code from URL}&client_id={client id from app}&client_secret={secret from app}&grant_type=authorization_code&redirect_uri={url from app}
   c. Have the values ready before getting the code because it will expire quickly

- Talend API Tester example:



- Postman example:



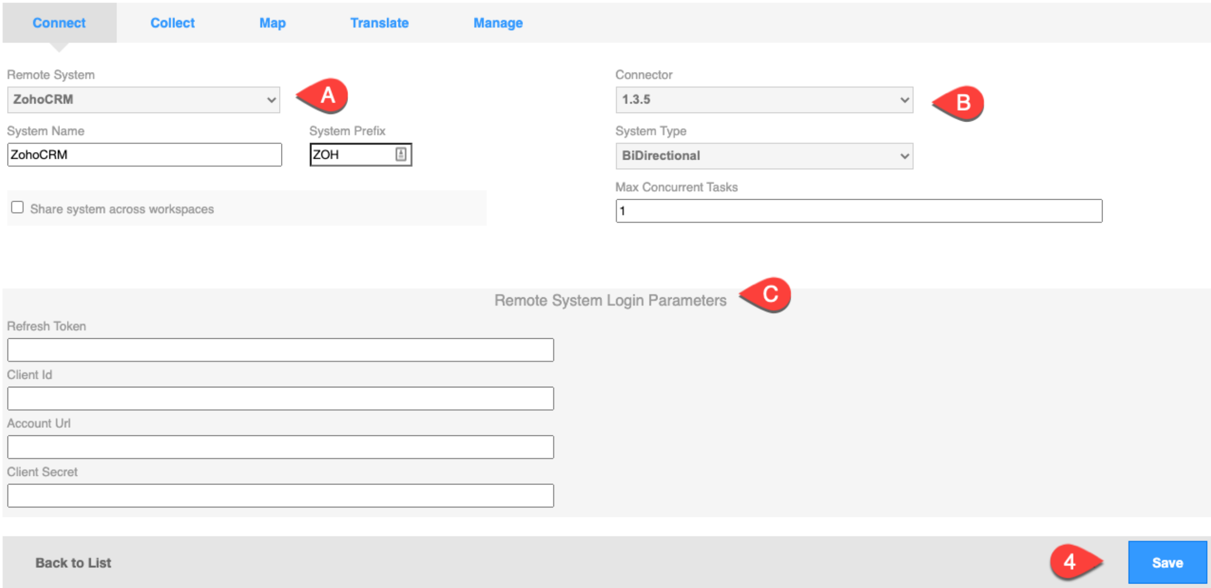
d. Copy/paste the **Refresh Token** from the response in a separate document and save for next steps

STEP 3: VERTIFY SYSTEM SETUP

Refer to the steps outlined below to set up the system in Vertify. Alternatively, you're welcome to schedule a working session to partner with your Vertify Integration Specialist on the steps below.

1. In Vertify, navigate to the **Connect** page
2. Click the **New System** button

3. Next, enter the required system credentials -



   a. Select Zoho from the Remote System List
   b. Select the highest Connector number (i.e., 1.3.5)
   c. You will enter the Login Parameters (Refresh Token, Client Id, Account URL, Client Secret) when available from steps outlined above:
      i. Refresh Token [Required]
      ii. Client ID [Required]
      iii. Account URL [Required]: https://accounts.zoho.com
      iv. Client Secret [Required]
   d. In Vertify, click the blue **Save** button
   e. This will initiate the scan and authentication step of connecting with Zoho with the provided credentials
   f. Look for a green Scan Complete message; if failed or error, retry the refresh token step above and re-scan.