

Zoho CRM to D-Tools Integration Process

A Step-by-Step Guide

Officehub tech

Overview of the Integration Process

Objective:

- Streamline project creation in Dtools

Requirements:

- Access to Zoho CRM.
- D-Tools API key from the SI integrator.

Step 1 - Obtain API Key

Instructions:

- Contact your SI integrator Administrator to obtain the D-Tools API key.

Notes:

- This API key is essential for establishing a connection between Zoho CRM and D-Tools.

The screenshot displays the 'Manage Integrations' interface of the D-Tools System Integrator. At the top, a message states: 'D-Tools System Integrator supports integrations with these partners. An API Key is generated for each integration you activate and must be used in the partner application. Your account has integrations activated with 2 partner(s).' Below this, a list of integrations is shown. The first integration is 'D-Tools API', which is highlighted in light blue. To its right, there are three links: 'View API Key', 'Regenerate API Key', and 'Deactivate Integration'. The second integration is 'Power BI', with a similar set of links. A modal window titled 'API Key' is open in the foreground, showing the API key for the 'D-Tools API' integration. The key is masked with a dark bar, and there are 'Copy' and 'Close' buttons at the bottom of the modal.

Step 2 - Install D-Tools Extension

- Notes:
 - Ensure you have administrative privileges to install the extension.

All Extensions **Installed**



D-tools for Zoho CRM

This will incorporate the projects in Dtools and Sales into the CRM system. ✕

Do you want to install the extension shared by sam@officehubtech.com?

Extension Details

Name	: D-tools for Zoho CRM
Version	: 1

I have agreed to the [Terms of Service](#).

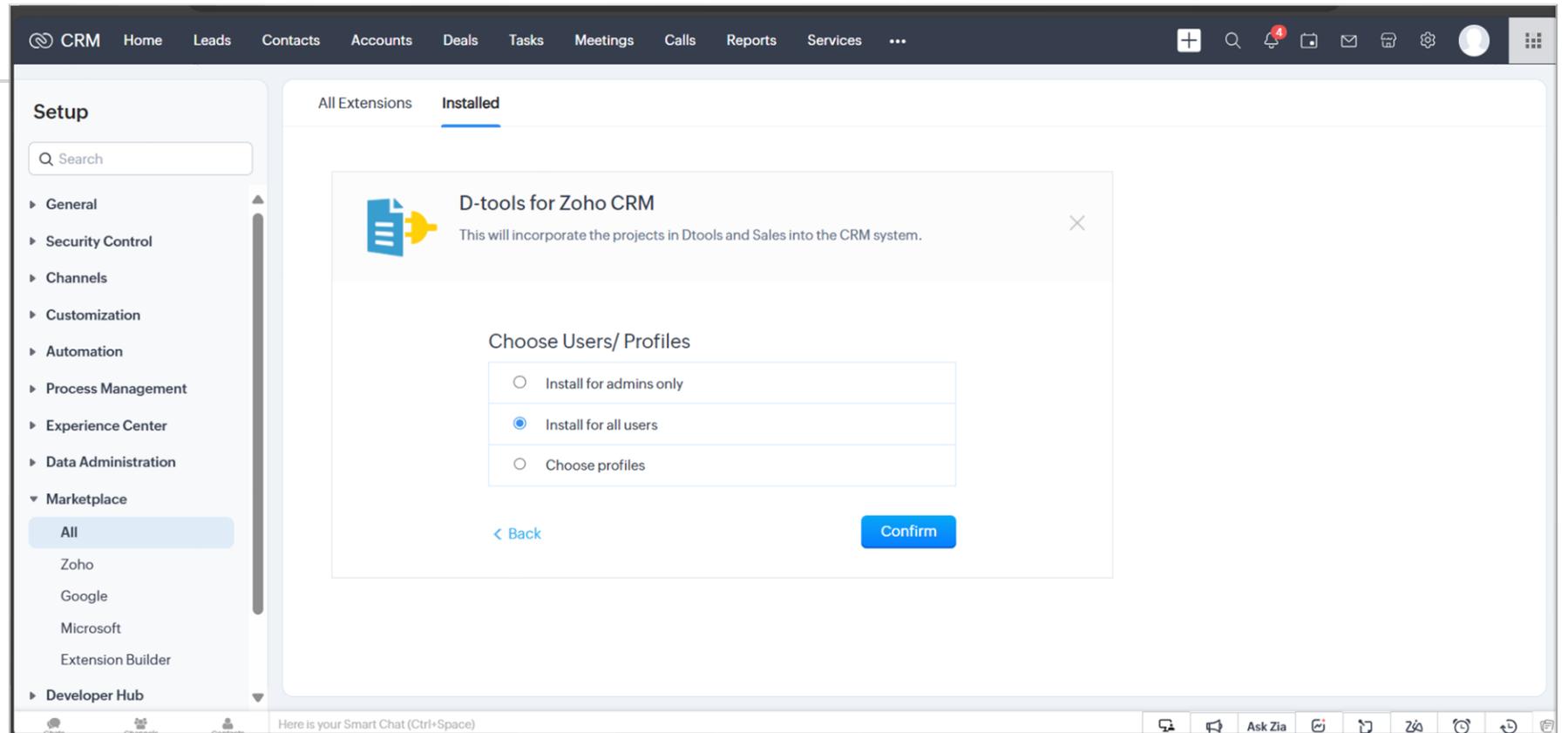
I authorize D-tools for Zoho CRM to access and process my data as required.

[Continue](#)

Step 3 - Configure User Profiles

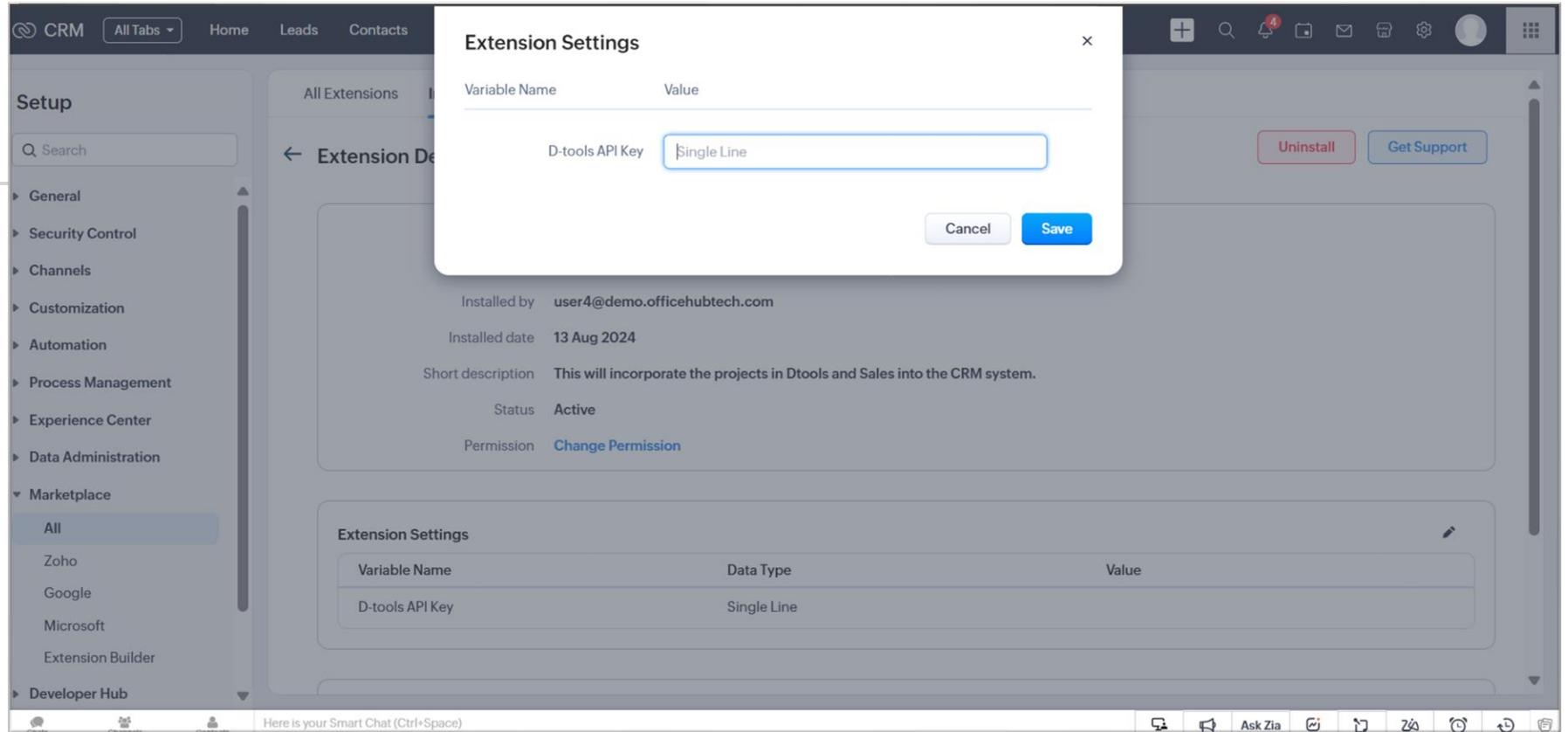
Instructions:

- Choose the appropriate user profiles who will have access to the D-Tools integration.



Step 4 - Enter API Key

- **Instructions:**
- Paste the API key obtained from your SI integrator.



- **Notes:**
- You can change the API key if it's regenerated in D-Tools.

The screenshot displays the Zoho CRM interface. The top navigation bar includes 'CRM', 'All Tabs', and various modules like Home, Leads, Contacts, Accounts, Deals, Tasks, Meetings, Calls, and Services. The left sidebar shows the 'Setup' menu with categories like General, Security Control, Channels, Customization, Automation, Process Management, Experience Center, Data Administration, Marketplace, and Developer Hub. The 'Marketplace' section is expanded, showing 'All' as the selected option.

The main content area is titled 'Extension Details' for the 'D-tools for Zoho CRM' extension. It includes the following information:

- Name: D-tools for Zoho CRM
- Version: 1.0
- Installed by: user4@demo.officehubtech.com
- Installed date: 13 Aug 2024
- Short description: This will incorporate the projects in Dtools and Sales into the CRM system.
- Status: Active
- Permission: [Change Permission](#)

Below the details is the 'Extension Settings' table:

Variable Name	Data Type	Value
D-tools API Key	Single Line	[Redacted]

A blue arrow points to the edit icon (pencil) in the top right corner of the 'Extension Settings' table.

Step 5 - Create Projects from Deals

- **Instructions:**

- Once a deal is created in Zoho CRM, navigate to the deal's detail page.
- Click the “Zoho to Dtools” button to create a project in D-Tools.

- **Notes:**

- This action pushes the deal information from Zoho CRM to D-Tools for project creation.

The screenshot displays the Zoho CRM interface for a deal named "Test Test1". The top navigation bar includes CRM, Home, Leads, Contacts, Accounts, Deals, Tasks, Meetings, Calls, Reports, and Services. The deal's detail page shows a "Send Email" button, an "Edit" button, and a "Zoho to Dtools" button with a dropdown arrow, which is highlighted by an orange arrow. Below the buttons, there is a "Related List" sidebar on the left and a main content area with tabs for "Overview" and "Timeline". The "Overview" tab shows a deal timeline starting on Aug 13, 2024, and ending on Aug 14, 2024. The deal is currently in the "Qualification" stage. Below the timeline, there is a table of deal details:

Deal Owner	user4
Stage	Qualification
Probability (%)	10
Expected Revenue	–
Closing Date	Aug 14, 2024

At the bottom of the page, there is a "Hide Details" button and a "Deal Information" section.

Summary

- Obtain API key.
- Install D-Tools extension.
- Configure user profiles.
- Enter API key in Zoho CRM.
- Create projects from deals in Zoho CRM.