Tab 1

User Guide for Bigin-Gsheet topping

Bigin-GSheet is an application that establishes a connection with your Google Drive & Sheets, allowing you to manage your Zoho Bigin CRM leads and data more efficiently.

Prerequisites:
1. Users should have a google account to which they can connect Zoho Bigin CRM module with their google account.
2. Users need to mention their Email in the topping settings to which they need to synchronize their Zoho Bigin CRM.
3. Users need to authenticate the connections for their toppings to work properly.
4. After authentication when users try to export any module data into google drive, it will always be present in Users Google Drive > "Bigin" Folder > "ExportModule_Name" spreadsheet.
5. When a user wants to Import Data from google drive, the user should always keep the Import data in Users Google Drive > "Bigin" Folder > "ImportModule_Name" spreadsheet.
6. ImportContacts Template Link:
   https://docs.google.com/spreadsheets/d/1lzg25WqsJmOIXrpZRUmnRRf882RwN_LLMvC0Qh6zl2Y/edit?usp=sharing
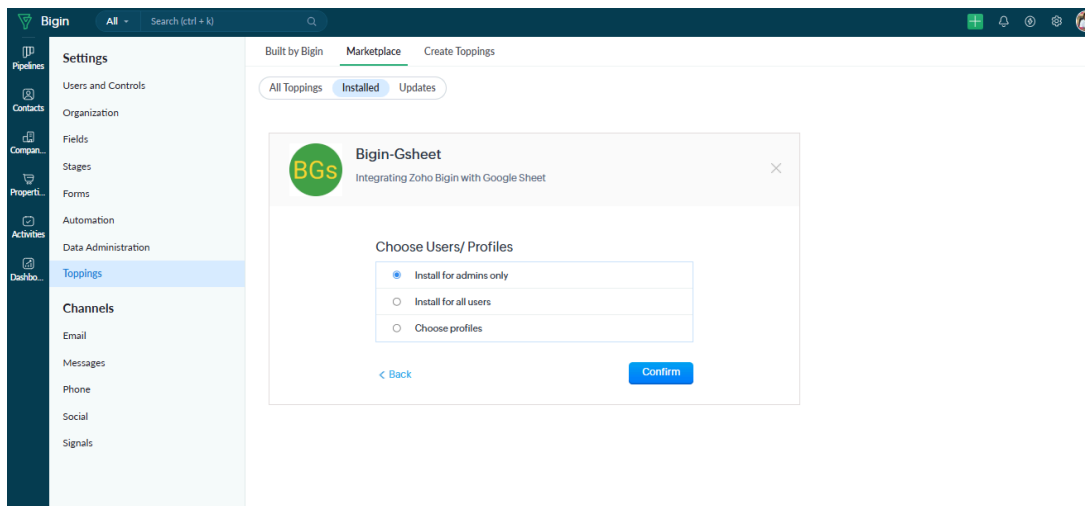
Steps to install the topping

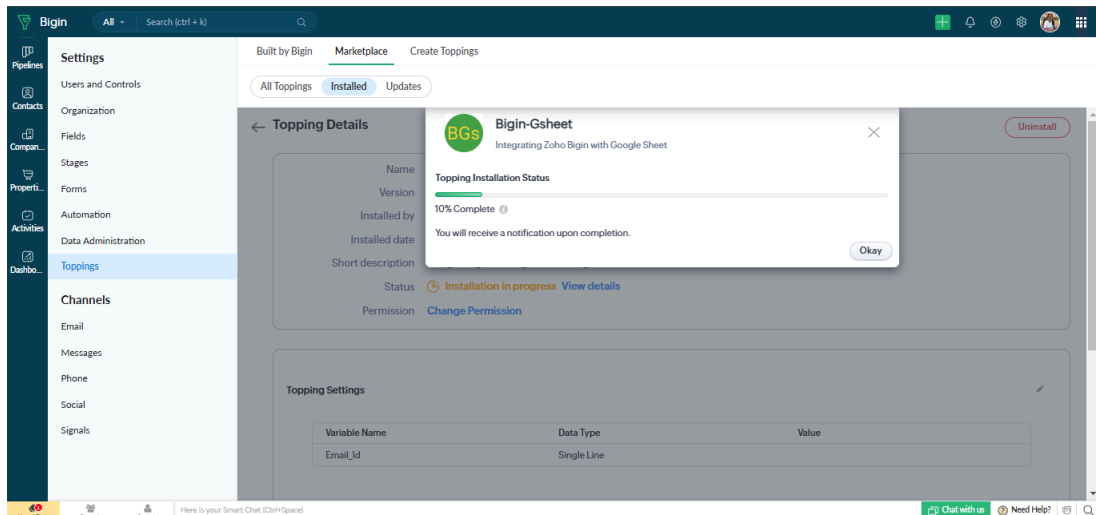● Installation of Bigin-Gsheet topping to the Zoho Bigin.
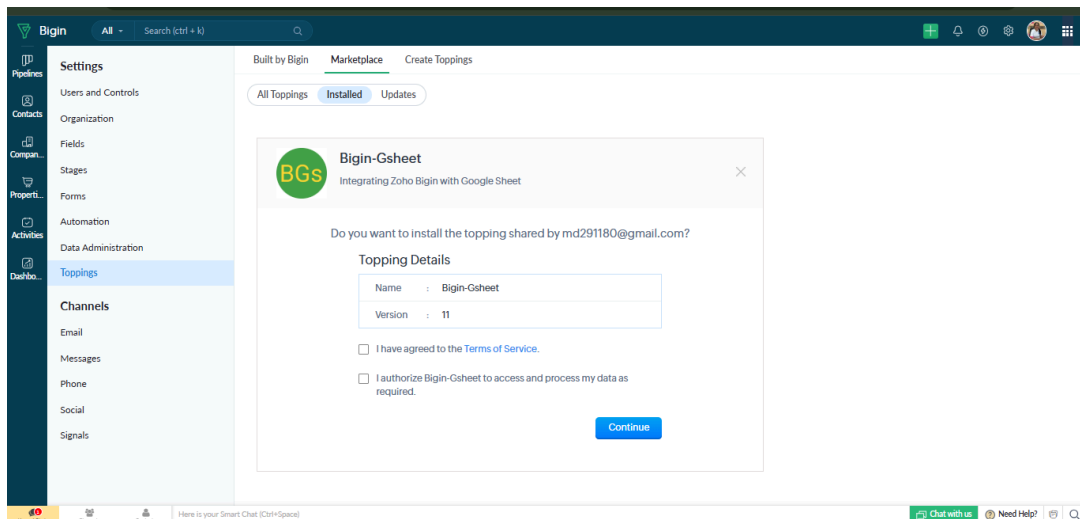
● Click on the both the checkbox and then click on Continue button.
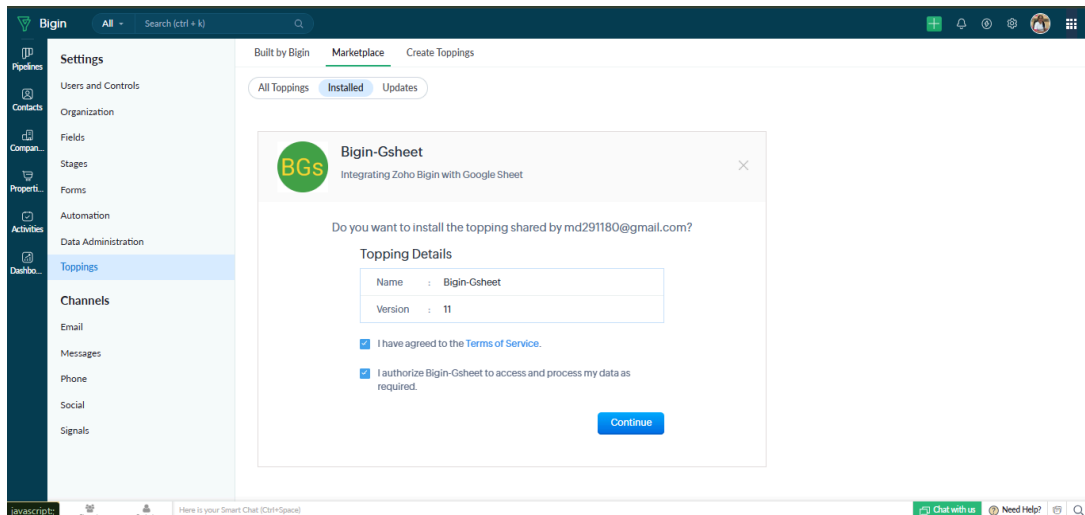
- Choose the Users/Profiles for which you need to give access to the Bigin-Gsheet topping. You can install for admins, users or other profiles, then click on confirm button.


- Topping will be installed in your Zoho Bigin application.

- After installation you can see the topping settings section in which Email ID value will be empty on your first installation, to add value click on the pencil icon on the topmost right side of topping settings section.
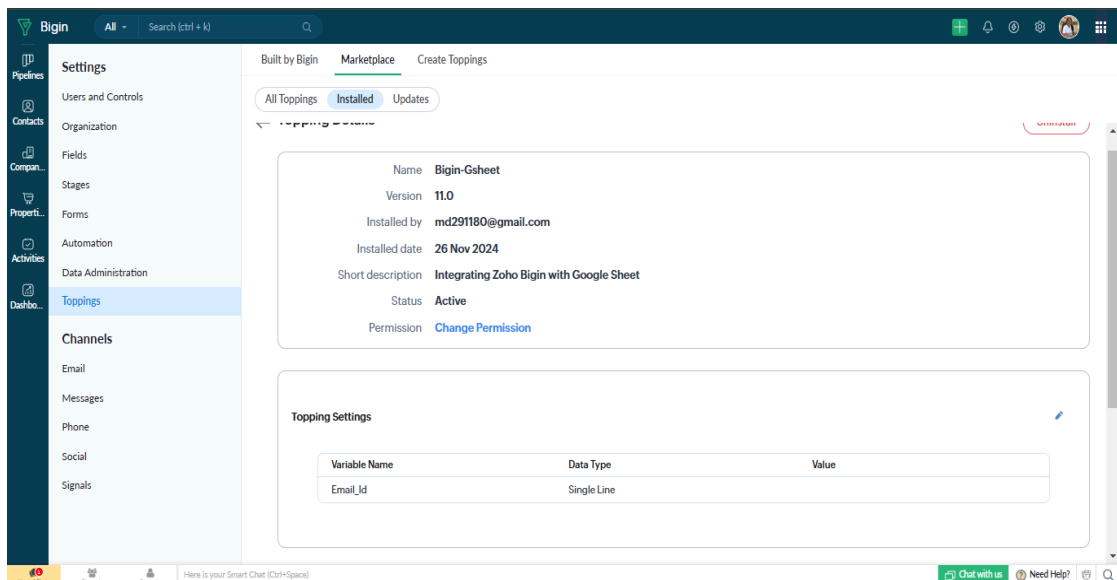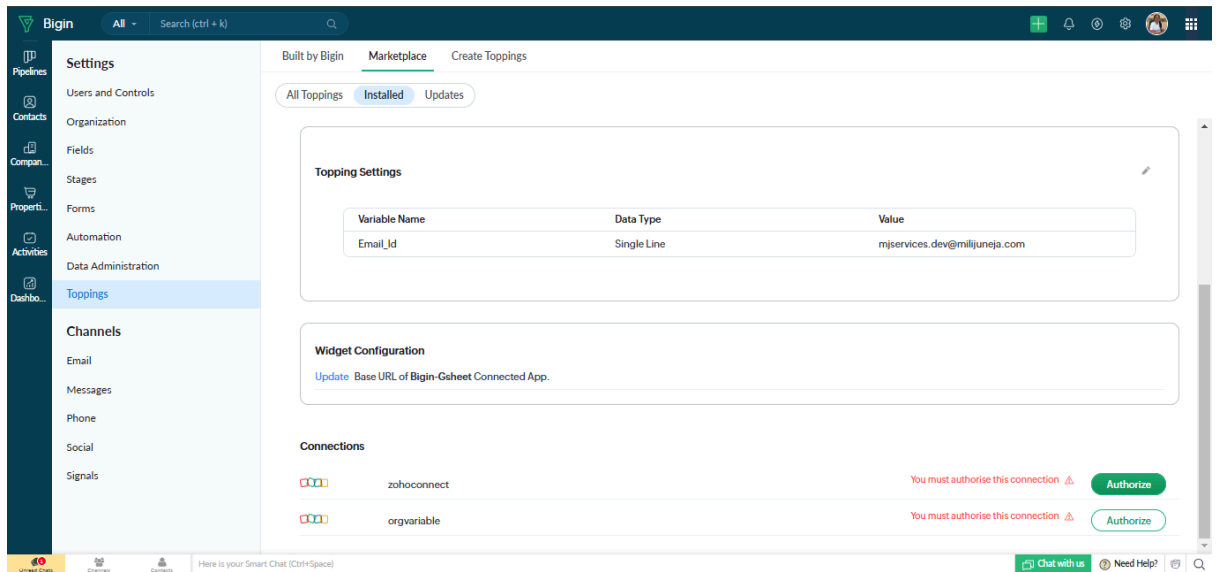

- When you click on the pencil icon you will be prompted to add Email Id in the value, kindly add the email address which you want to connect your Zoho Bigin application with Bigin-Gsheet topping.
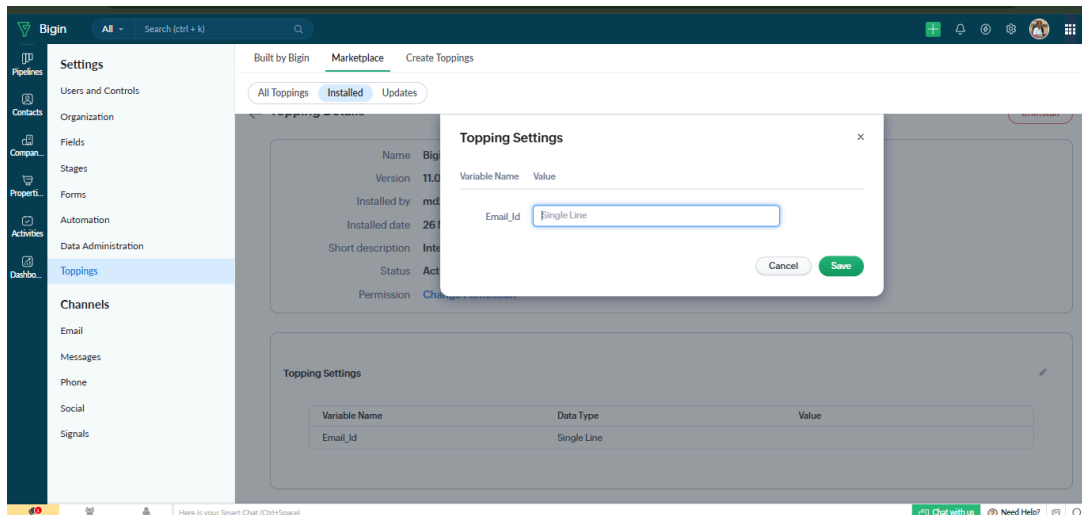
- After adding the email address in the value click on save button.
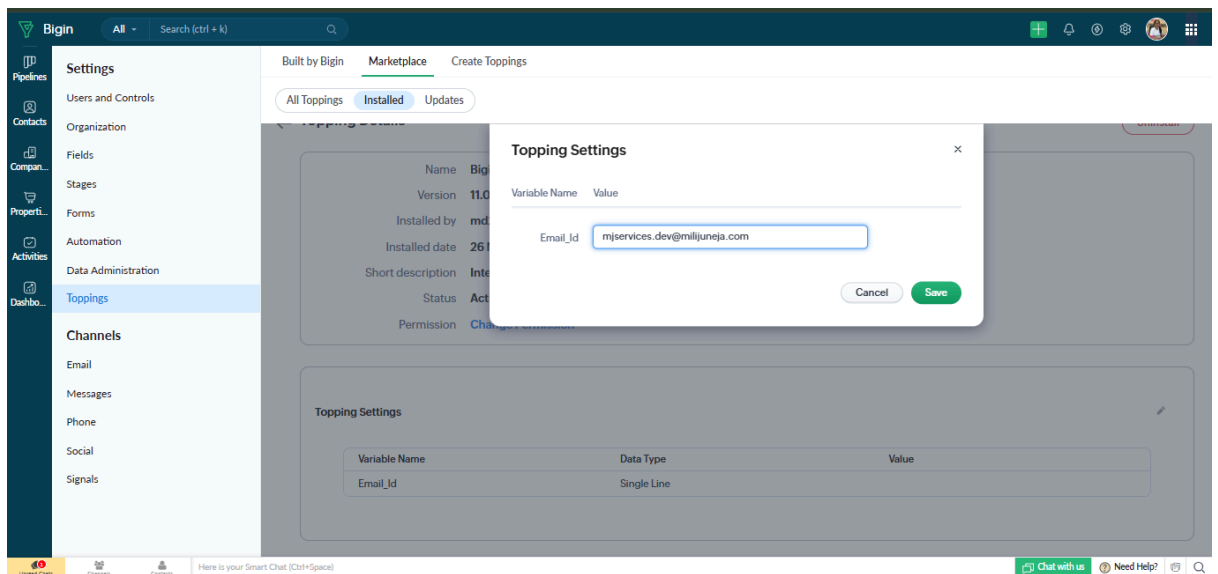
- Next, scroll down to below you will able to see connections section click on the authorize button for each connection to authenticate the connections required for the topping to work properly.

● When you click on the Authorize button you will be redirected to the page below, click on connect button.
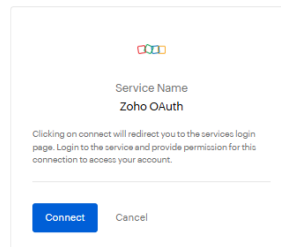
● When you click you will be redirected to the page below where you will be asked to accept the data from your Zoho Bigin account, click on the accept button to give access to mentioned scopes.

- To read accounts data
- To get settings variables
- To read, create, update and delete sub pipeline
- To create sub pipeline
- To update sub pipeline
- To delete sub pipeline
- Manage all operations on team pipeline metadata
- Create team pipeline metadata
- Update existing team pipeline metadata
- Delete existing team pipeline metadata
- Update team pipelines data
- To get, create, update and delete team pipelines data
- Write team pipelines data
- Get team pipelines data
- Delete team pipelines data
- Create team pipelines data

By clicking the "Accept" button you allow DRE IDC to access data in your Zoho account.

Accept   Reject

- When you accept you will revert back to the topping page, similarly authorize the next connection to provide access to the required scopes.
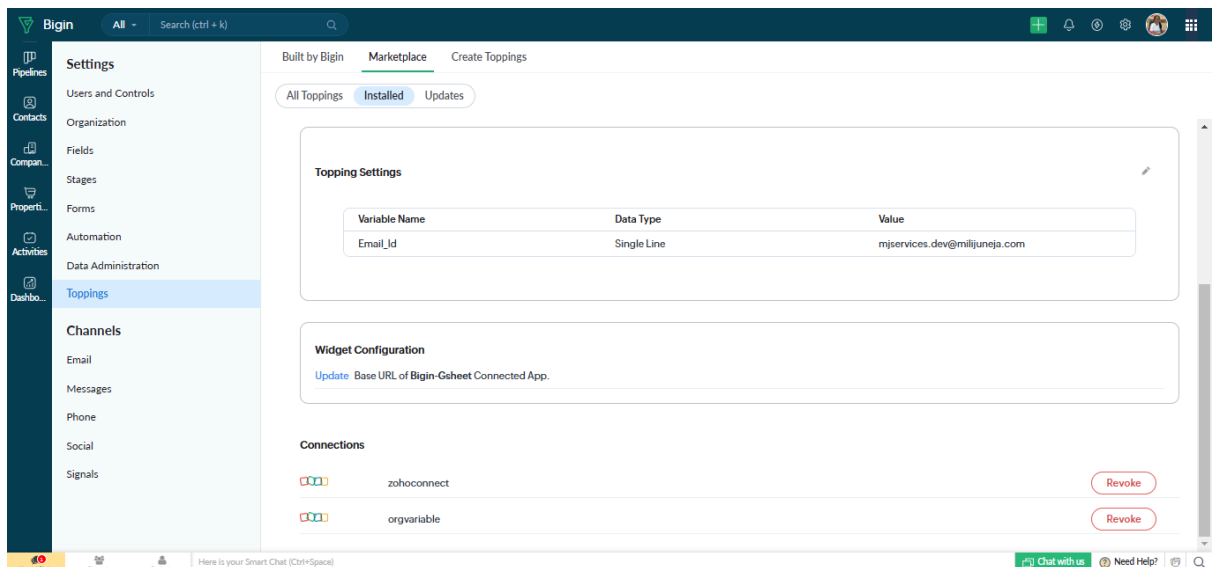
Connecting Google drive with Zoho Bigin

- Navigate to the Pipeline module in Zoho Bigin, you will be able to see a button namely "GsheetConnect" in the top right corner in utils menu, click on it.

- When you click on it you will be redirected to our application "Bigin-Gsheet" to authenticate yourself with a google account.
Note: Authenticate only the google account whose email address you have mentioned while installing the topping in topping settings.
Click on Login button in Bigin-Gsheet application.
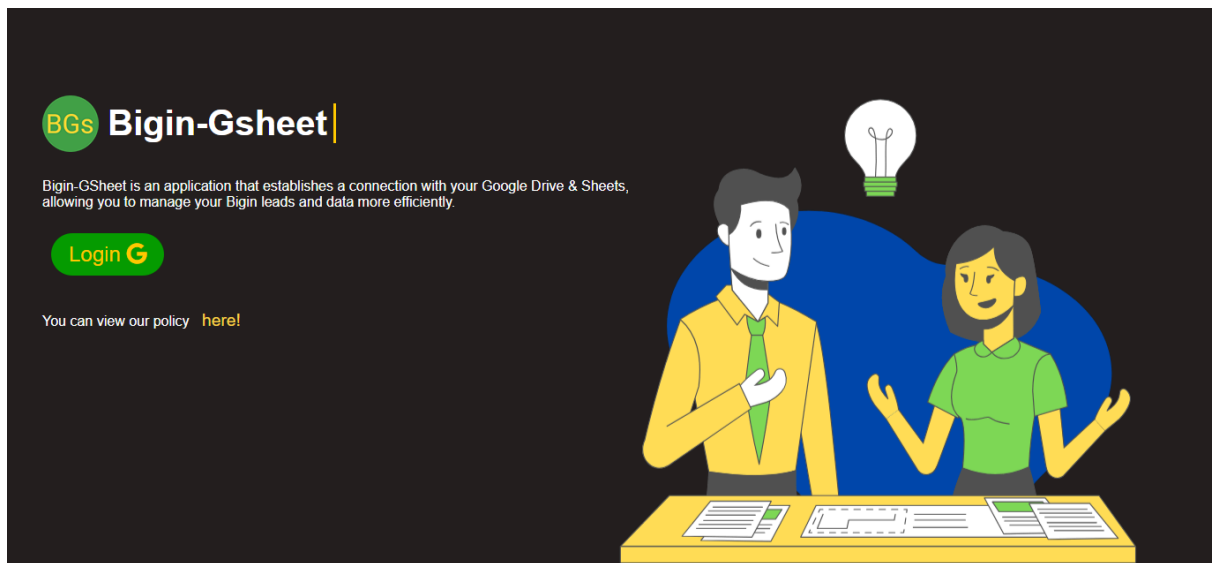
- Choose the account you want your topping to be connected with.
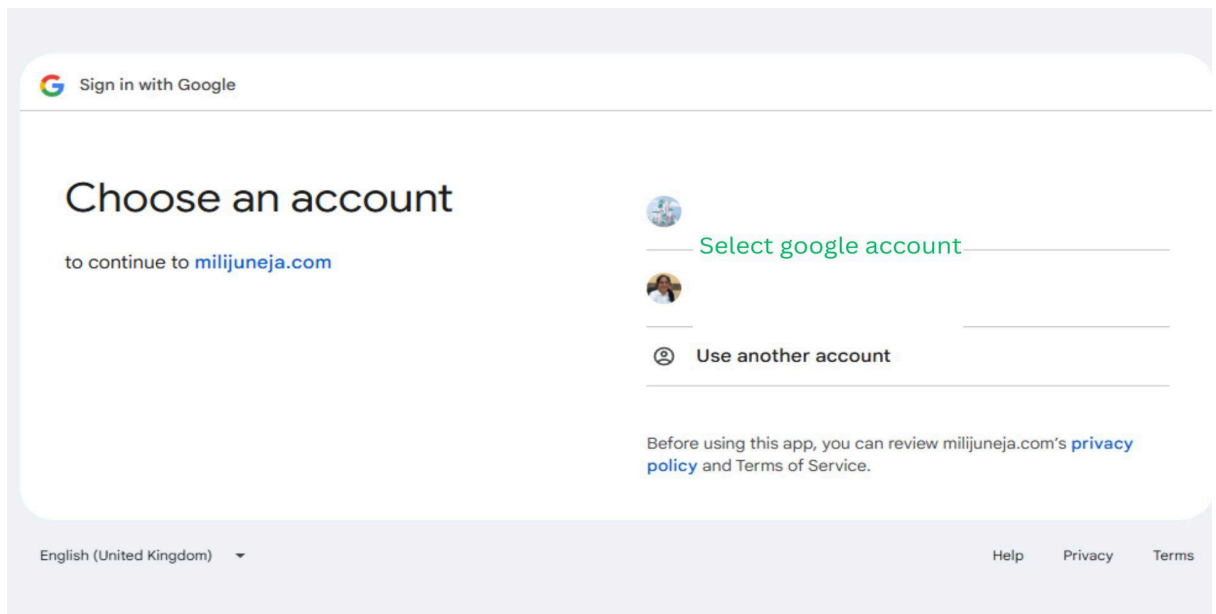
- After login you will be able to be redirected to the userprofile page where you will be able to see the Google Drive button click on it, which will redirect you to logged in users Google Drive.
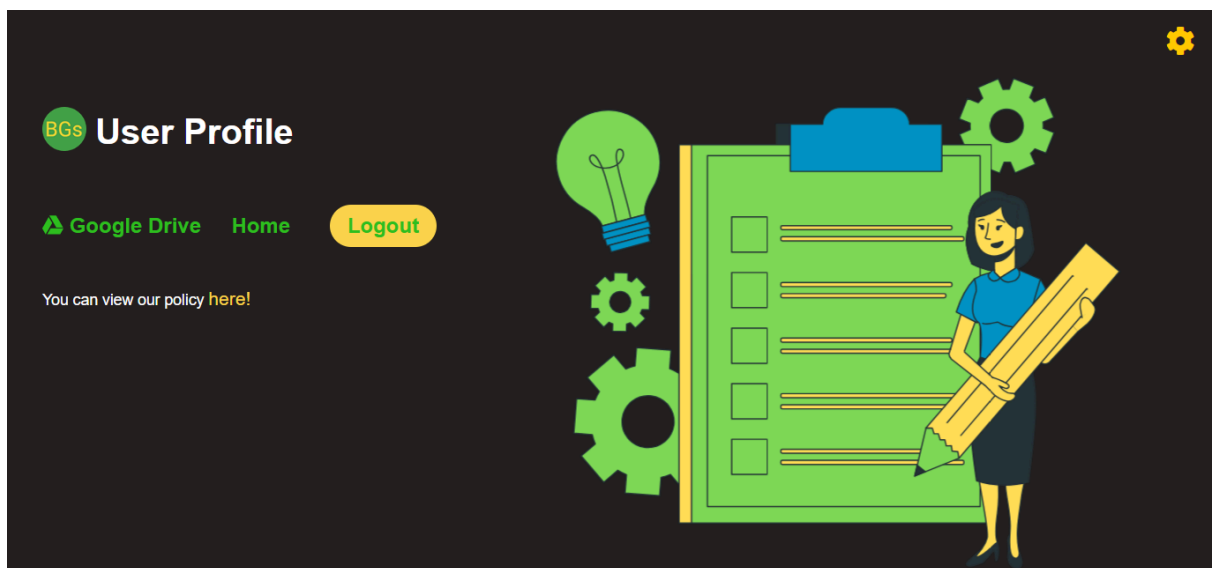
- You will be able to redirect to your google drive, now navigate back to your Zoho Bigin application.
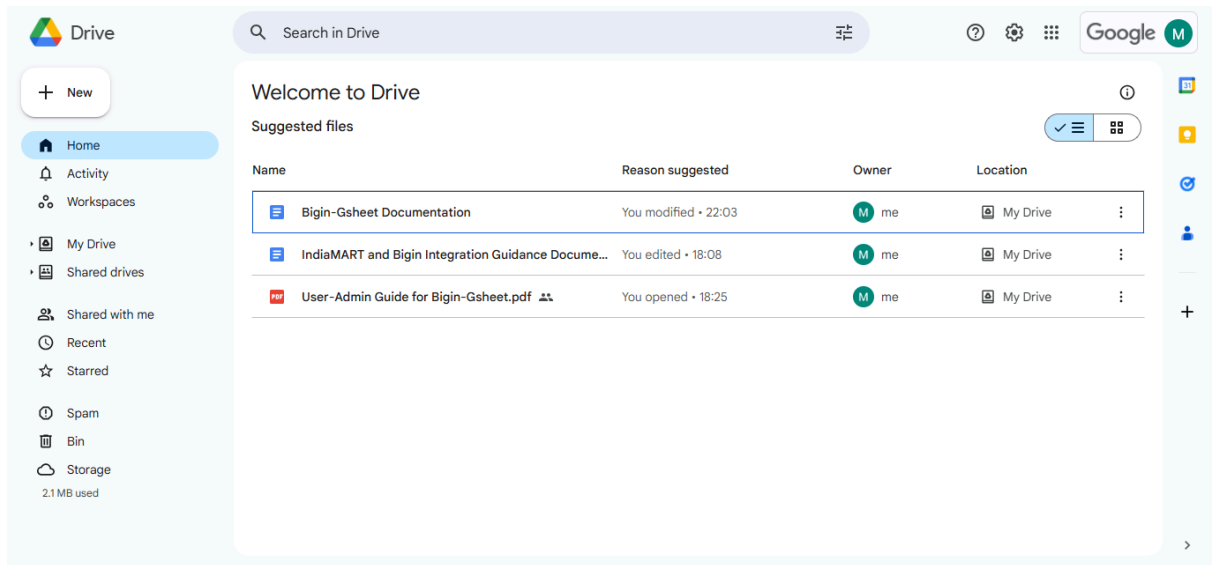
- When you navigate back to your application, you will be prompted with a success message.
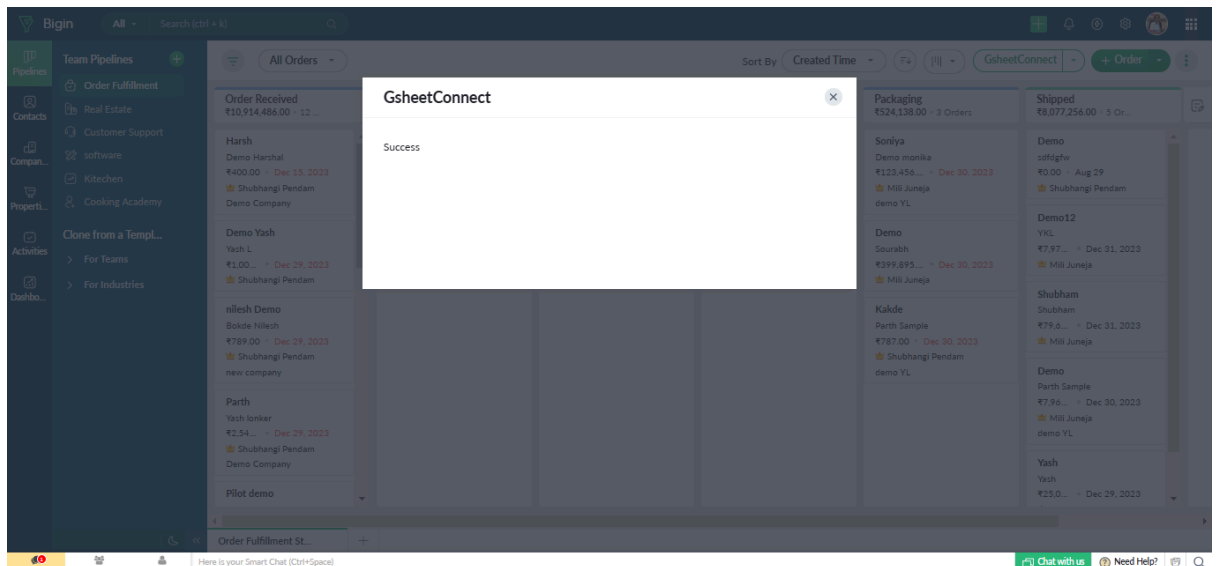
Export Pipeline

- Close the prompt and again in the GsheetConnect button you will see a dropdown arrow beside the button click on it and below it you will be able to see the ExportPipeline button, click on it.
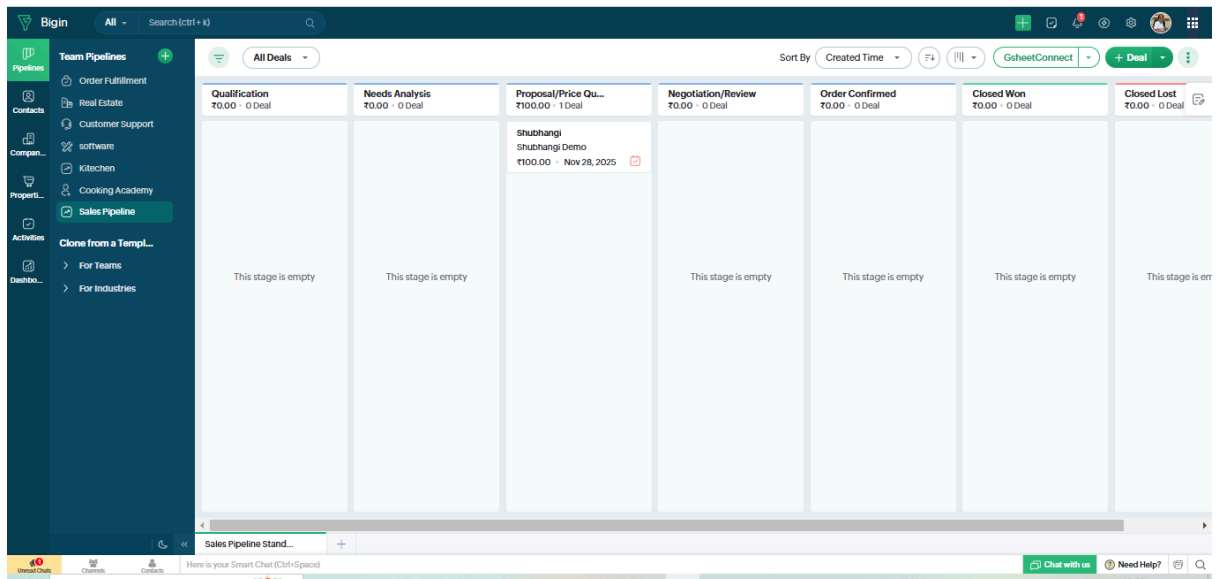
- When you click on it, you have to wait for a few seconds and you will be able to see a prompt of success message which tells you that you have successfully exported your Zoho Bigin Pipeline module data to your mentioned google account drive.
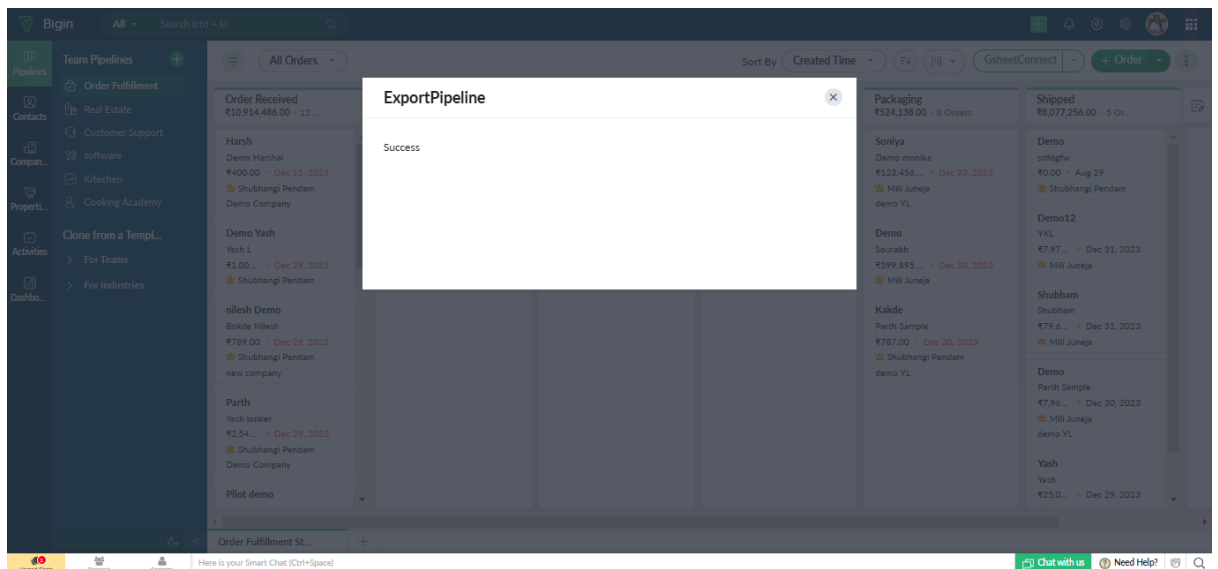
- Navigate to your google drive, you will be able to see a folder namely "Bigin" open it.

- Open the Bigin folder in that you will be able to see a spreadsheet is created namely Pipeline which refers to the data of Pipeline module of Zoho Bigin CRM.

Export Contacts

- Again, navigate back to Zoho Bigin CRM and open the Contact module.

- Click on the ExportContact button in the topmost right corner in the utils menu.

- After a few seconds you will be able to see the success message prompted on the screen.
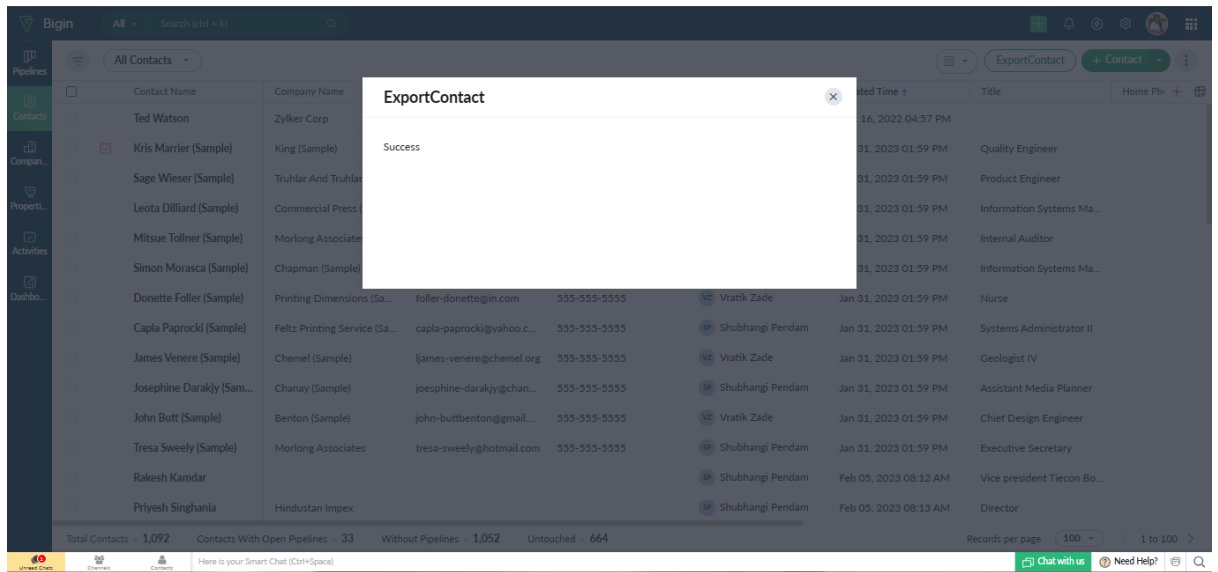
- Navigate to Google Drive and in Bigin Folder you will be able to see the new spreadsheet namely "Contact" which refers that you have successfully exported the Contact Module data.
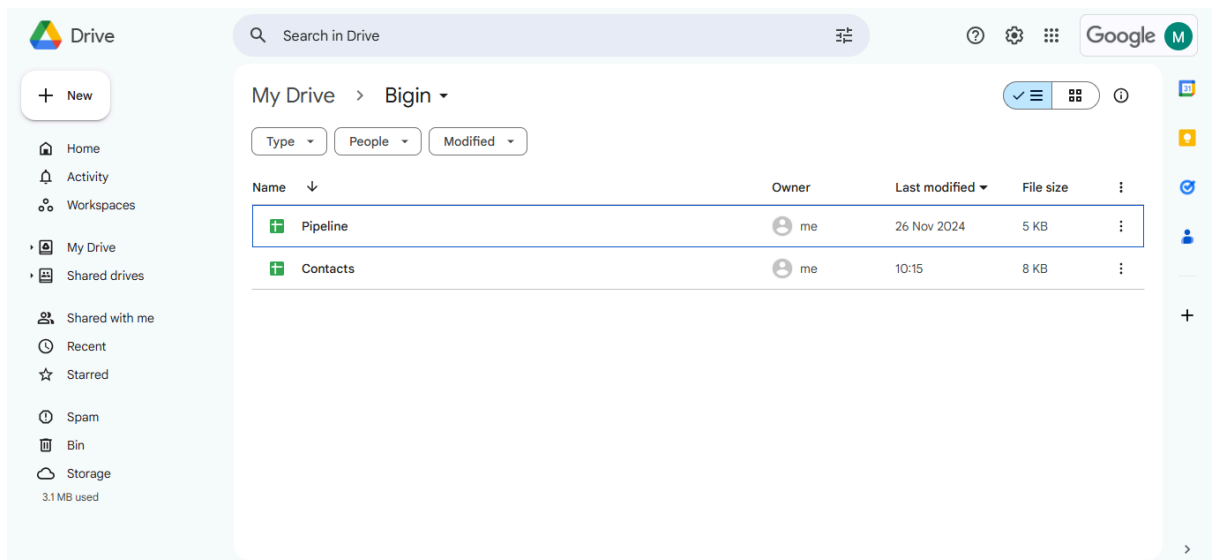
- Open the Contacts spreadsheet, you will be able to see all the data from the Contacts Module of Zoho Bigin CRM in Google Spreadsheet.

Export Companies

● Navigate to the Zoho Bigin CRM and open the Company module.

● Click on the ExportCompanies button present in the topmost right side of the utils menu in the Companies module.

- Wait for a few seconds as it will export the Companies data in Google Sheets which will be created in Google Drive & you will be able to see a success message.

- Navigate to Google Drive and open the Bigin folder you will be able to see new spreadsheet is created in the folder.
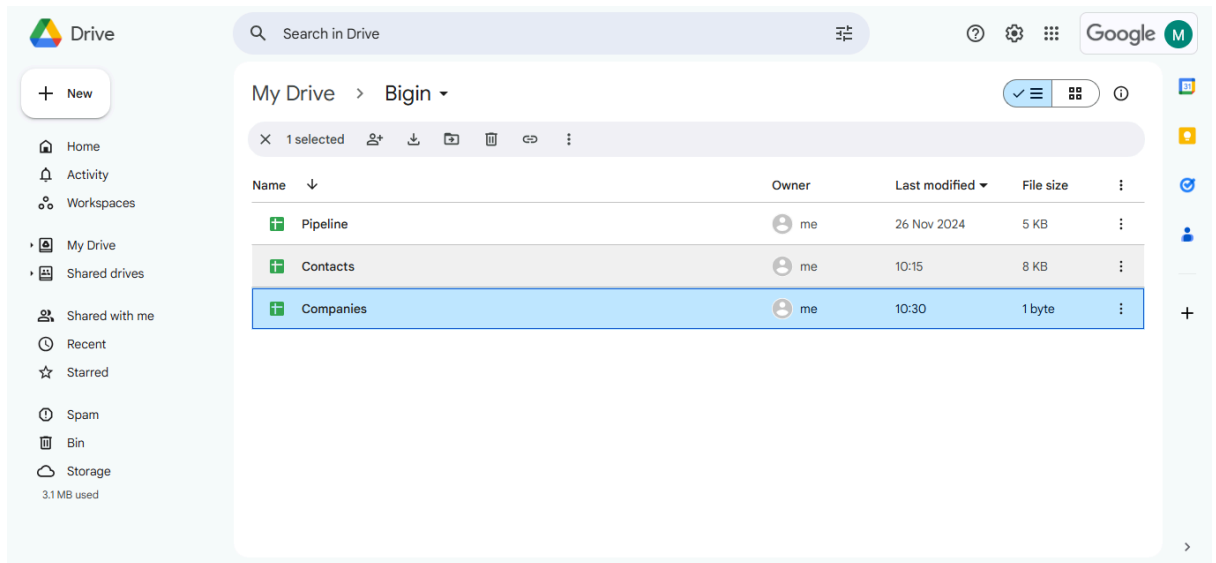
- Open the spreadsheet and you will be able to see the companies data of Zoho Bigin CRM in Google sheet.

## Import Contacts from Google sheet

- To import module i.e. Contacts Module data from Google Sheet, users need to create a spreadsheet in the same folder "Bigin", name the spreadsheet "ImportContacts".
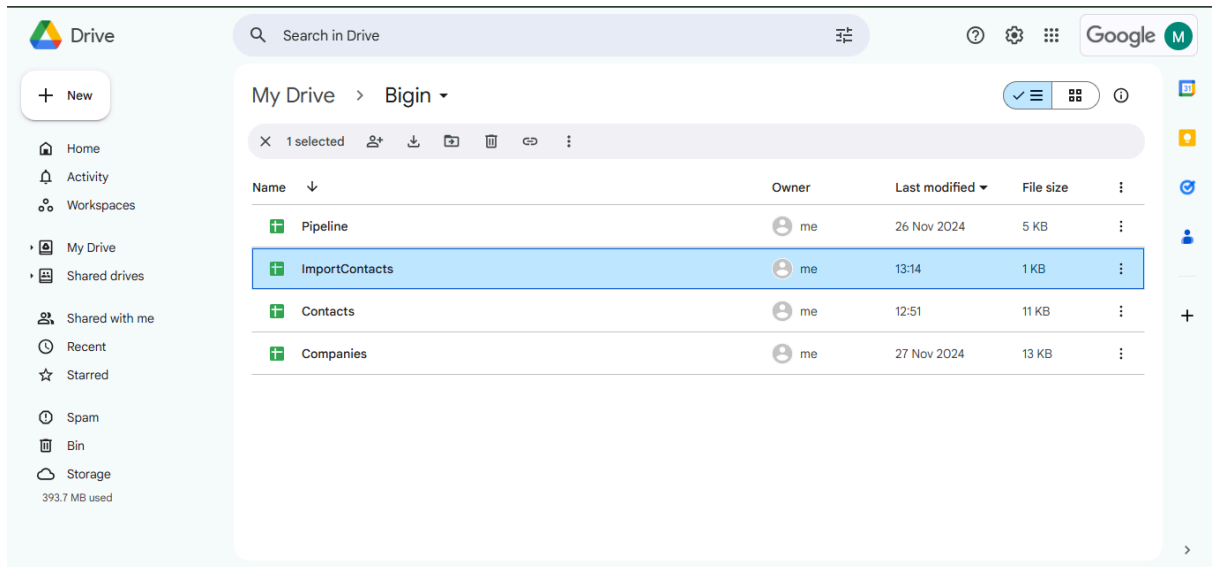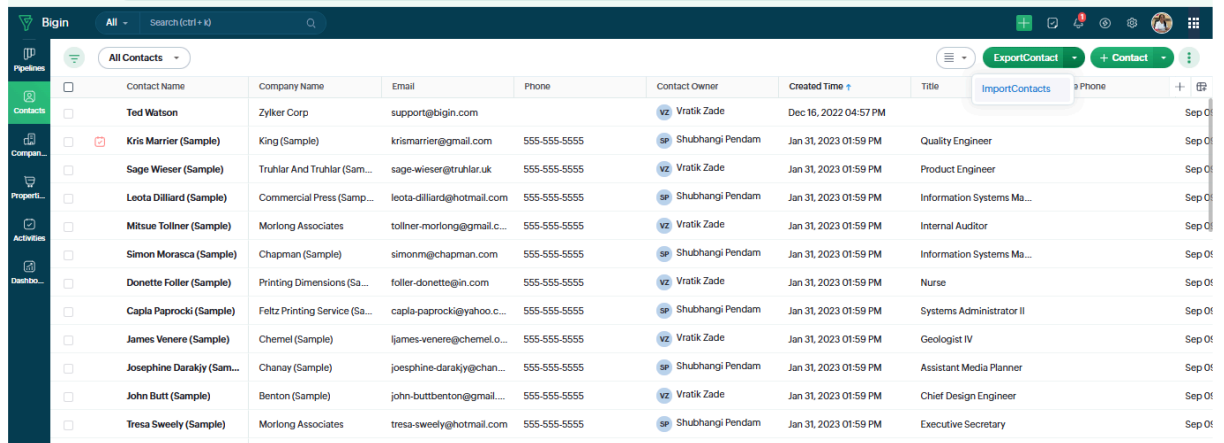
- Open the spreadsheet and represent the headers mentioned in the image below, or refer to the link for ImportContact Template Link mentioned in prerequisites.
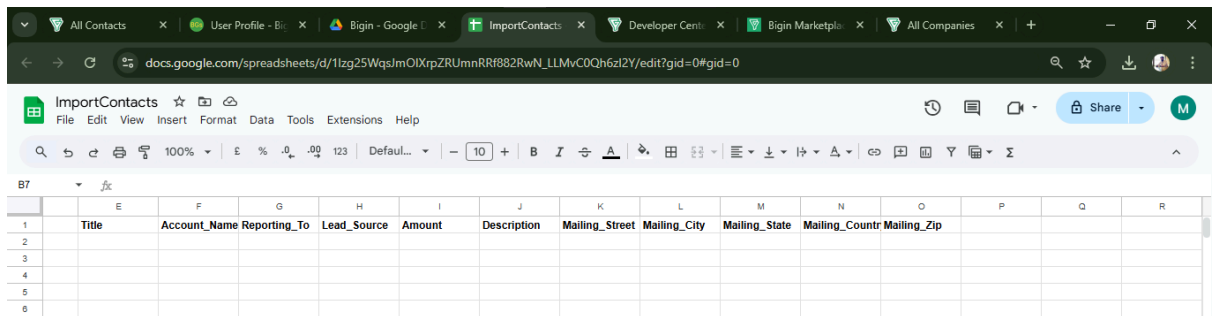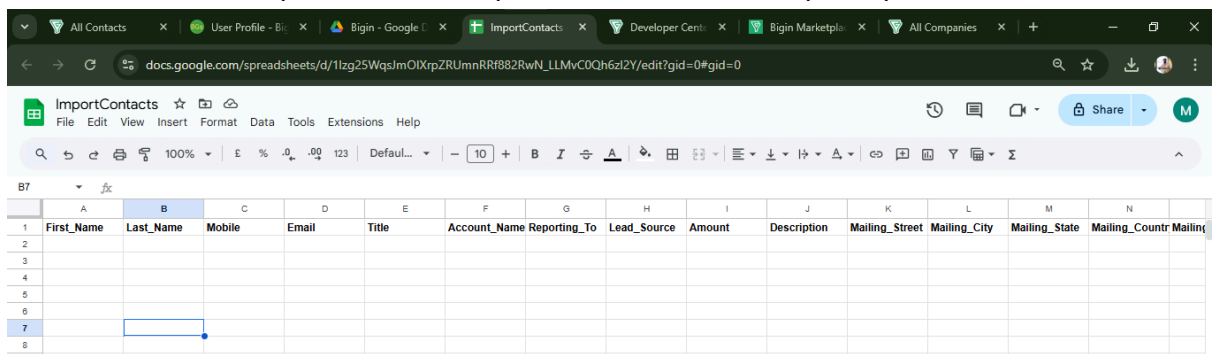
- Add data values according to headers,
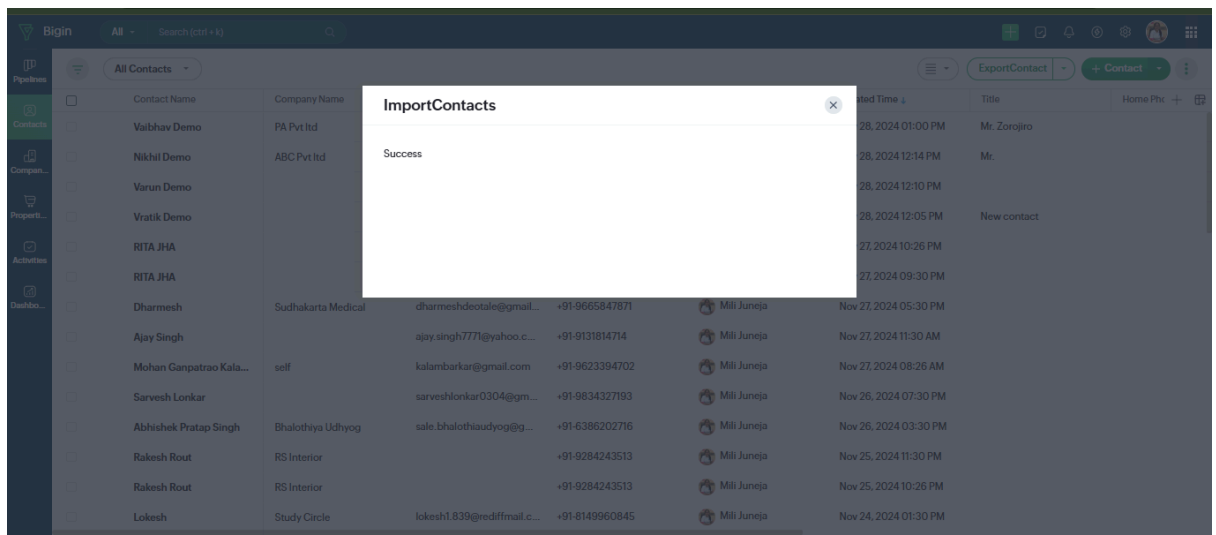 Note: Do not add any values in Reporting_To header.
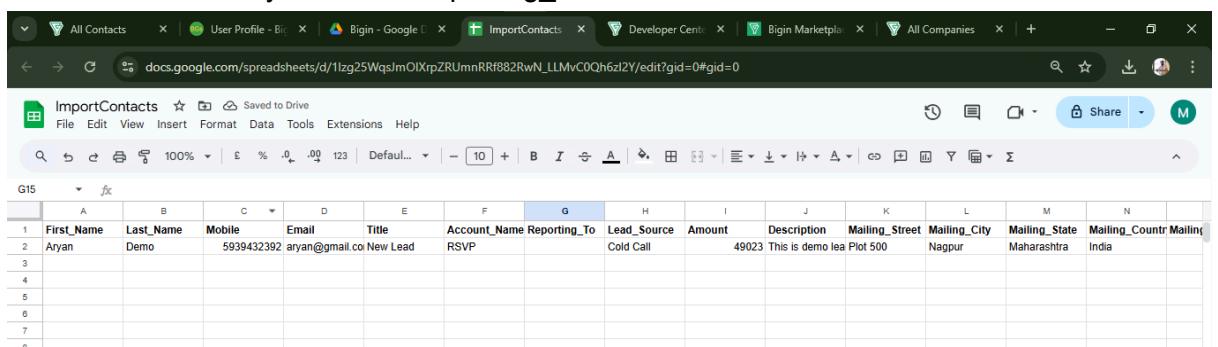
- Navigate to Zoho Bigin, and open the Contacts module and click on the the dropdown present beside the ExportContact button at topmost right utility menu, you will see the ImportContacts click on it to import contact from ImportContacts spreadsheet present in Bigin folder in Users Google Drive.
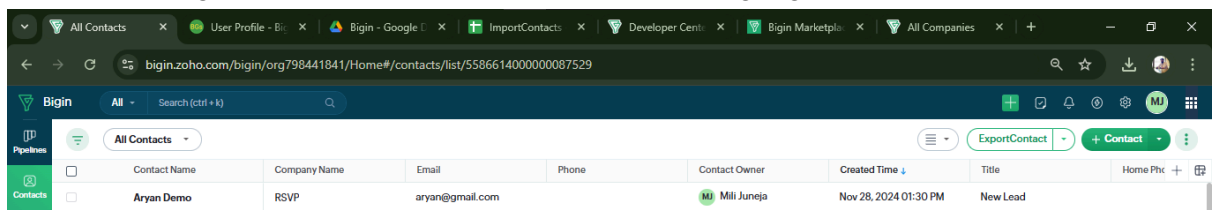

- You will see that record is fetched successfully from the google sheet & you will be able to see a success message prompted on screen.

- Refresh the page, to see the imported contact data from google spreadsheet.

Key features :-

1. Seamless Integration: Bigin-GSheet connects effortlessly with your Google Drive and Sheets, ensuring smooth data synchronization.
2. One-Click Data Transfer: Export and import data between Google Sheets and Zoho Bigin in just a single click.
3. Time-Saving: Reduces manual effort, streamlining data management processes.
4. User-Friendly: Intuitive interface for hassle-free operations, even for non-technical users.