

Zoho Desk to simPRO (Standalone) User Guide

Summary 2

Functions 2

How to Install 2

General Settings 2
- Setting permissions 2

Authorise simPRO and Zoho 3

Configuration Details 4
- Organization Id 4
- Default Site ID 4
- simPRO Domain Prefix 5
- Multi Company 5
- simPRO Companies 5
- simPRO API Key 5
- Default Customer Type [Companies/Individuals]: 6
- Default Project Type [Service/Project]: 6

Final Touches 6

Support **8**

Summary

This is a user guide to walk you through some of the basic functionalities of the Zoho Desk to simPRO (standalone) extension.

Functions

- Create a New QUOTE or a New JOB or Convert a QUOTE to a JOB in simPRO. Link ticket to an existing JOB or QUOTE in simPRO.

- Transfer ticket information to the Quote/Job such as the description and automatically lookup the Customer and Site in simPRO from the customer's email ID in Desk.

- Sites will also be checked against the customer and if there are no sites, a default site is associated.

- Creates new customers if not found in simPRO using the email address from Desk.

- simPRO Multicompany support. Choose the company from the dropdown list to send a Quote/Job to that company in simPRO.

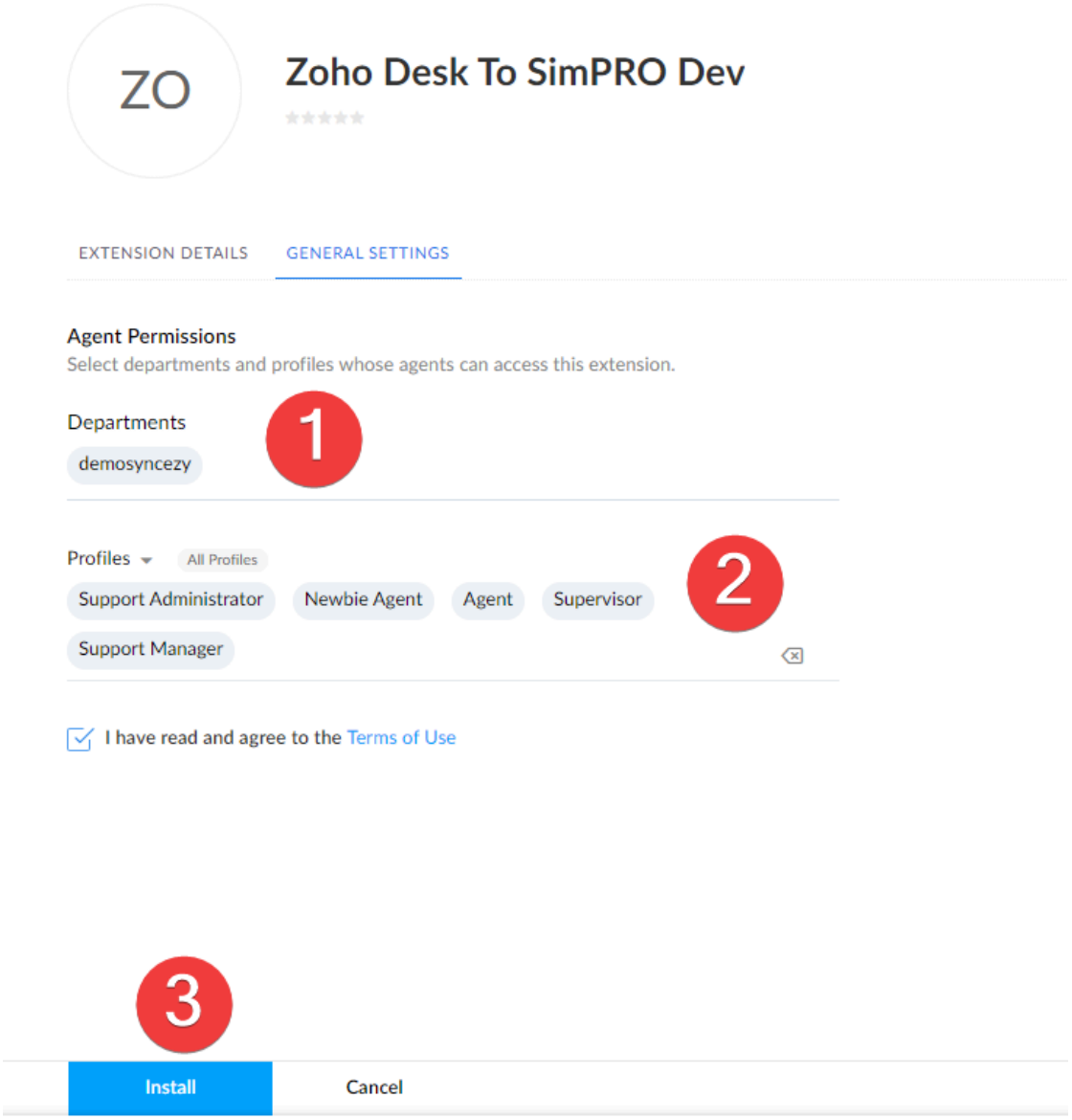
How to Install

<to be added when the application is published>

General Settings

Setting permissions

Once installed, you will be prompted to select the Department and Profiles to whom this extension will be visible. Choose the options you want, agree to the terms of use and click Install.



Authorise simPRO and Zoho

Once the extension is installed, go to the General Settings tab. Navigate to “Authorize your account for ZApps External Client service to activate this extension.” and authorise your simPRO account.

Next, navigate to “Authorize your account for Zoho OAuth service to activate this extension.” and authorise your Zoho account.

You should get a success message in the corner when this is done.

Configuration Details

Default Site ID

Here you need to set the Default Site ID to create a Quote or a Job. A Site and a Customer are mandatory fields for creating a Quote or Job. In the event the Customer does not have a Site, the Default Site configured will be linked to the Quote/Job instead

You will need to create a default site in simPRO, retrieve the Site ID and then add the ID in this field. You can also choose another Site if you wish, simply add that Site's ID in this field.

_____.simprosuite.com (simPRO Domain Prefix)

This is used to connect your Zoho Desk account with your simPRO build URL.

For example, www.syncezy.simprosuite.com. In this example, we choose "syncezy" as the value to enter.

Multi Company [Yes/No]

This field is used to enable Multi Company syncing. Only "Yes" or "No" are acceptable values. Yes if you want to configure simPRO Multi Company, No if you don't or if you have a single company.

SimPRO Companies (ID - Names) exp [2 - Sydney, 3 - Melbourne]

If you don't have a multi-company setup, enter 0 - company name here. If you wish to link only one company, you will need to enter the company ID - company name (eg. 4 - SyncEzy).

If you have multi-company in simPRO, enter in this format: company ID - company name (eg. 6 - SyncEzy). For more companies, add the same with a comma separator (eg. 6 - SyncEzy, 7 - Zoho,..., etc).

simPRO Company IDs can be found by going to simPRO > Setup > Company

Note: Avoid using commas and dashes in the company name as these are specifically used as delimiters.

SimPRO API Key - simPRO→Setup→API→Application [xxxxyyyy123xxxyyy]

This helps us to communicate with simPRO. Navigate simPRO→Setup→API→Application > Create Application. Enter the following values:

Company: <Your company name>
Name: Zoho Desk Authentication
Redirect URI: https://desk.zoho.com / https://desk.zoho.com.au / https://desk.zoho.eu (depending on your Desk domain)
Email Address: <Your Email Address>
Description: Client application for Desk-simPRO
Authentication method: API Key

You have to copy the API Key and paste it into this field in the configuration. You can also write to support@syncezy.com if you need help with this.

Default Customer Type [Companies/Individuals]:

In this option, you have to set the value as Companies or Individuals. This defines the customer type to be created from the extension, Company Customer or Individual Customer.

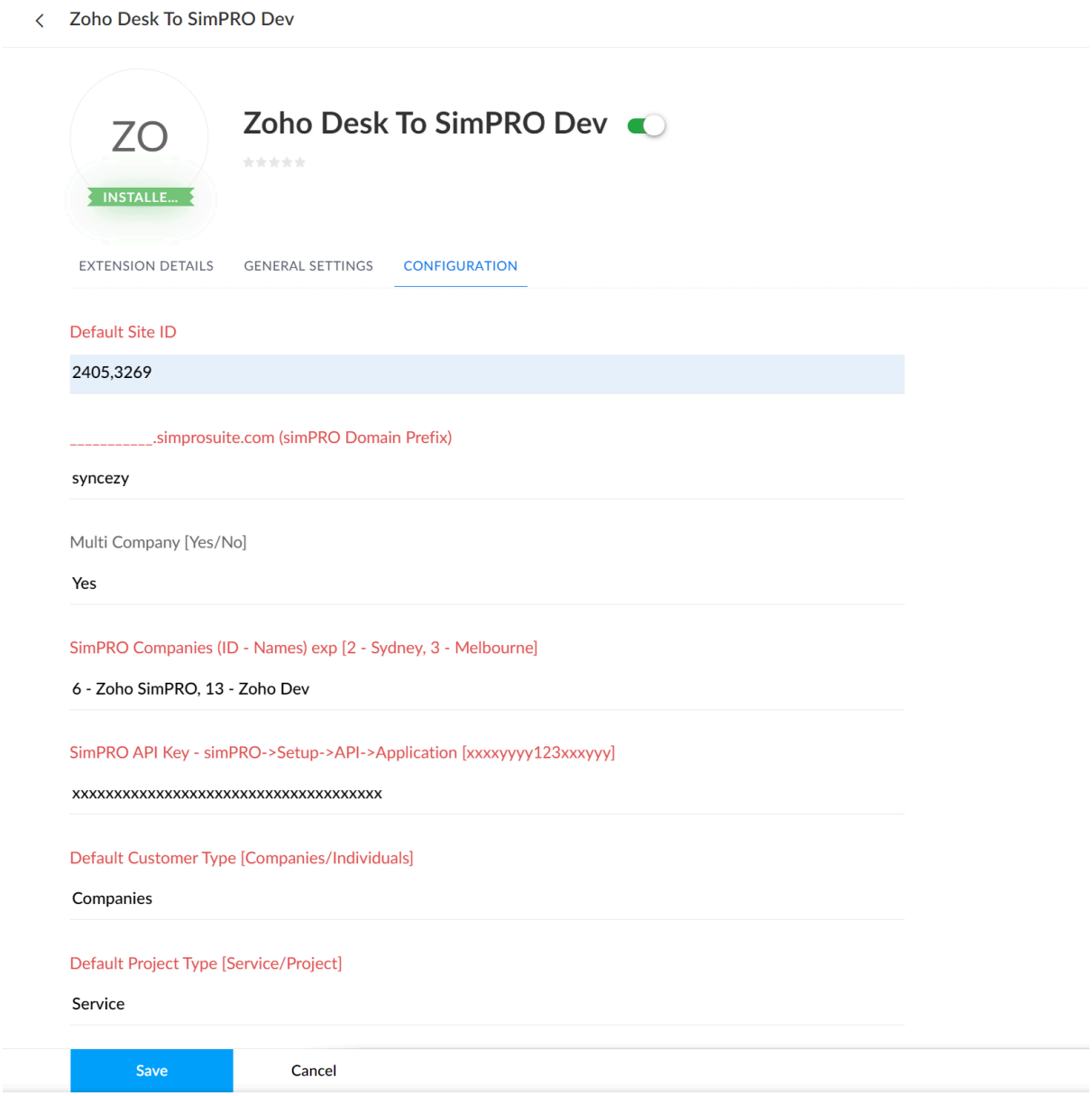
Default Project Type [Service/Project]:

In this option, you have to set the value as Service or Project. This defines the Quote/Job type to be created from the extension, a Service Quote/Job or Project Quote/Job.

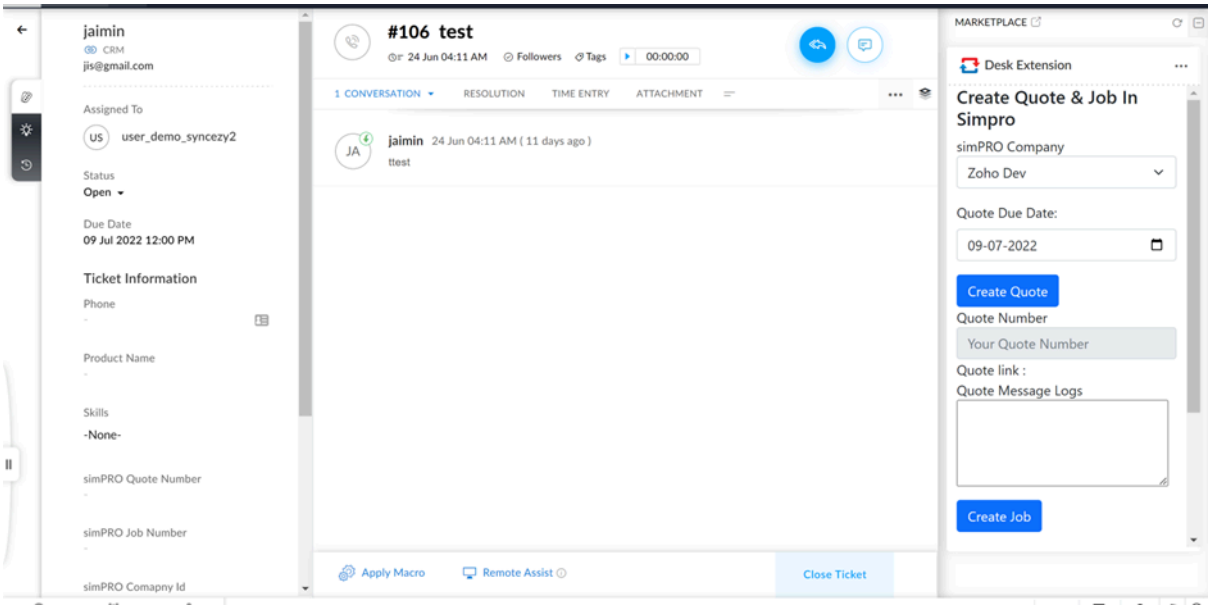
Click Save when all the changes are done.

Final Touches

Your configuration page should look something like this after it is done. It may vary depending on your inputs.



Once the setup is complete, the extension will appear as below, on the side of the ticket. Click the  logo if you can't see it.



Handy Tips

Support

If you have any queries or issues to report, please write an email to support@syncezy.com. You can also dial any of the following numbers depending on where you are calling from.

Australia: +61 2 9136 9448
New Zealand: +64 9 303 2999
United Kingdom: +44 203 670 1109
United States: +1 720 500 9302