Setup Guide:

Act-On Software for Zoho CRM

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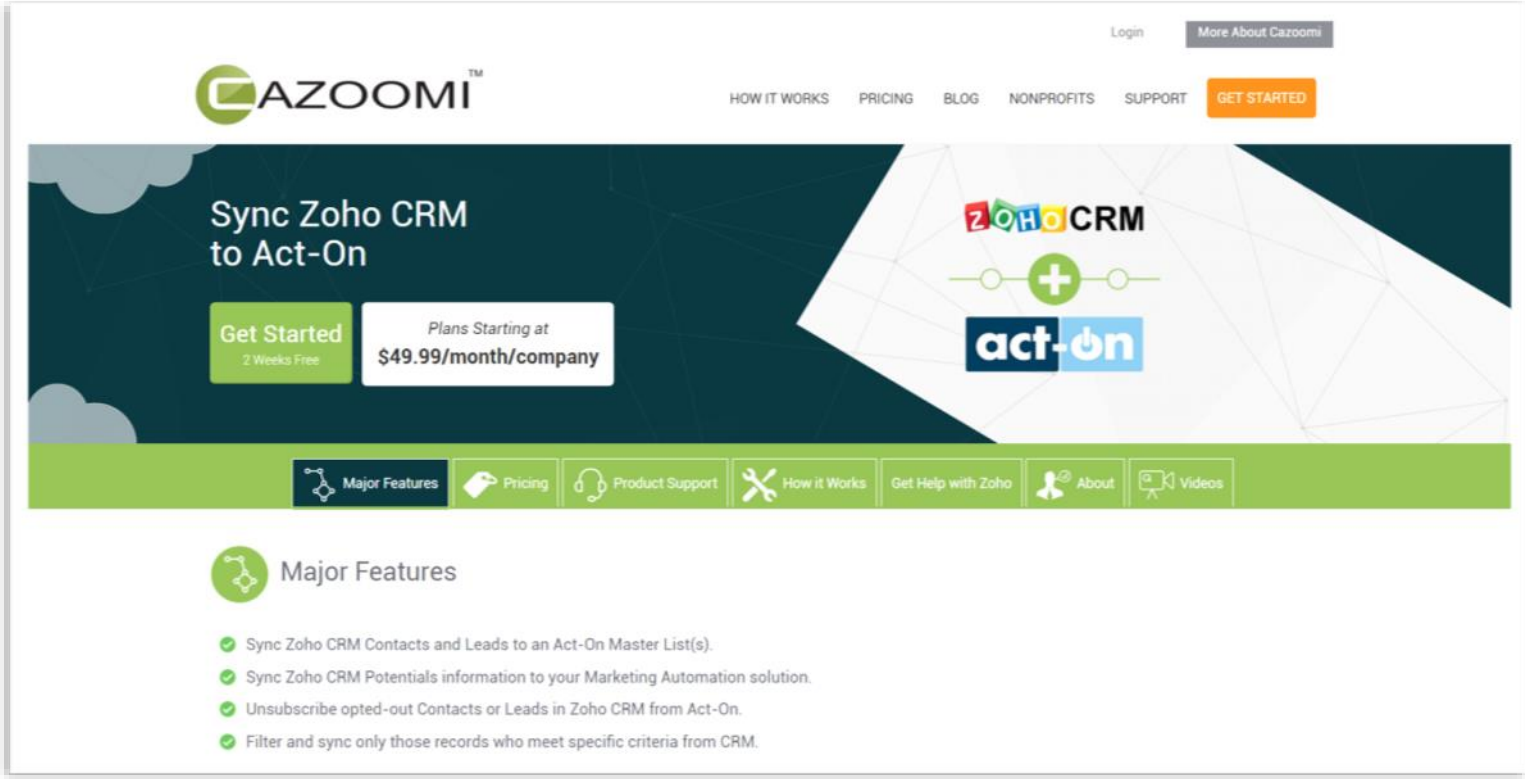
SyncApps Powered by CAZOOMI

Select your SyncApps

Integrating your Cloud, On-Premise or Plug-in application with your Financials, Marketing, eCommerce, Support, and other mission-critical applications is now a reality.



Questions? Contact our 24/7 support team.

Touch base with the Cazoomi product team leads, share ideas, and get answers to your SyncApps questions.

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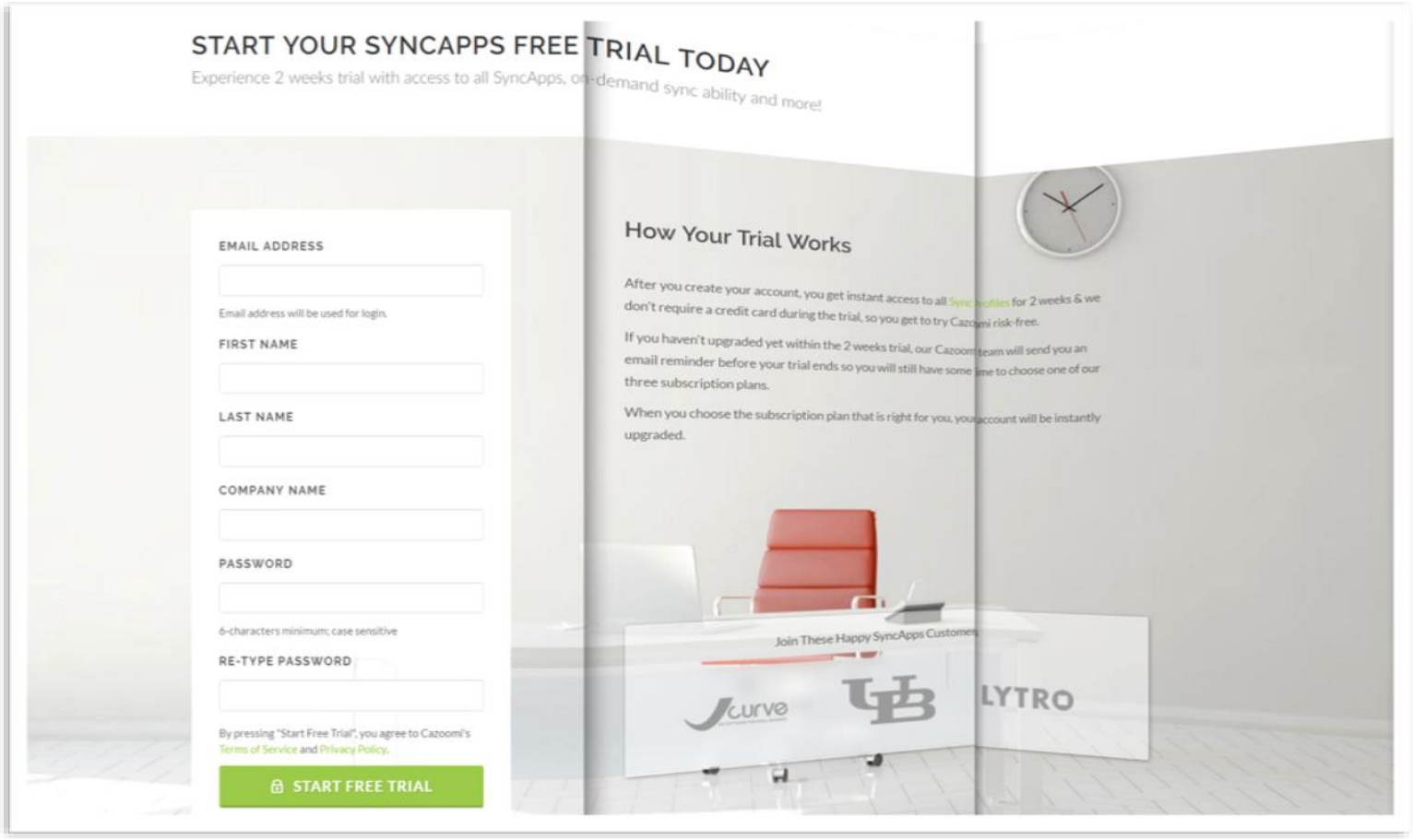
Register your Credentials

Signing up for an account is as easy as putting in your Email, Name, Company Name and choosing your password. After you create an account, you and your company will get instant access to all Sync Profiles for 2 weeks, and we don't require a credit card during the trial, so you get to try Cazoomi risk-free.



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MAJOR FEATURES

- Sync Zoho CRM Contacts and Leads to an Act-On Master List(s).
- Sync Zoho CRM Potentials information to your Marketing Automation solution.
- Unsubscribe opted-out Contacts or Leads in Zoho CRM from Act-On.
- Filter and sync only those records who meet specific criteria from CRM.
- Sync Opt-outs from both Zoho CRM and Act-On automatically.
- Custom field mapping between both systems.
- Delete Converted Leads feature to Marketing Automation solution.
- Sync Lead Score from Act-On to CRM.
- Execute workflow trigger on new Contact or Lead creation.
- Sync specific Campaigns and Campaign responses from Act-On to CRM.
- Sync Act-On Email Campaign metrics back to the original Zoho CRM Campaign, Campaign Response custom field, Custom Modules or even Notes.
- Sync Zoho CRM Campaign(s) to an Act-On Master List(s).
- Zoho CRM always takes higher precedence over Act-On. Any data changes CRM will always be synced to Act-On.
- Contact and Lead data is synced from Act-On only if the email address doesn't exist in Zoho CRM at the time of syncing.
- Please contact your Act-On Customer Success Manager (CSM) to gain access to the Act-On APIs.

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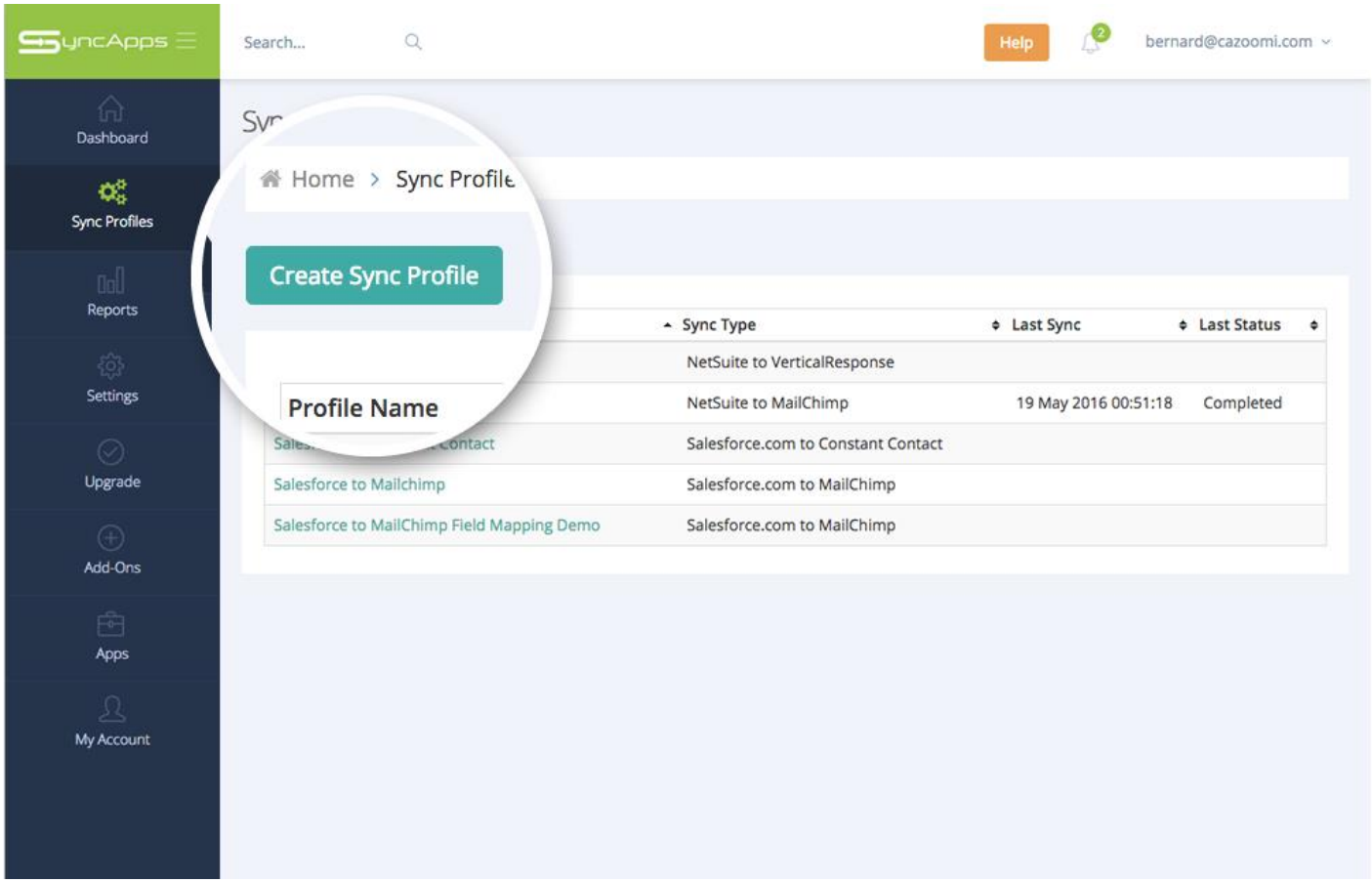
1 Create Sync Profile

Select the Apps you use to get started as this will also include any Sync Add-Ons, field mapping or filters.



A Sync Profile refers to the setup of 2 available software applications where one application is synced to another application. This includes all the settings for both applications including connection configuration, field mapping, and Sync scheduling.

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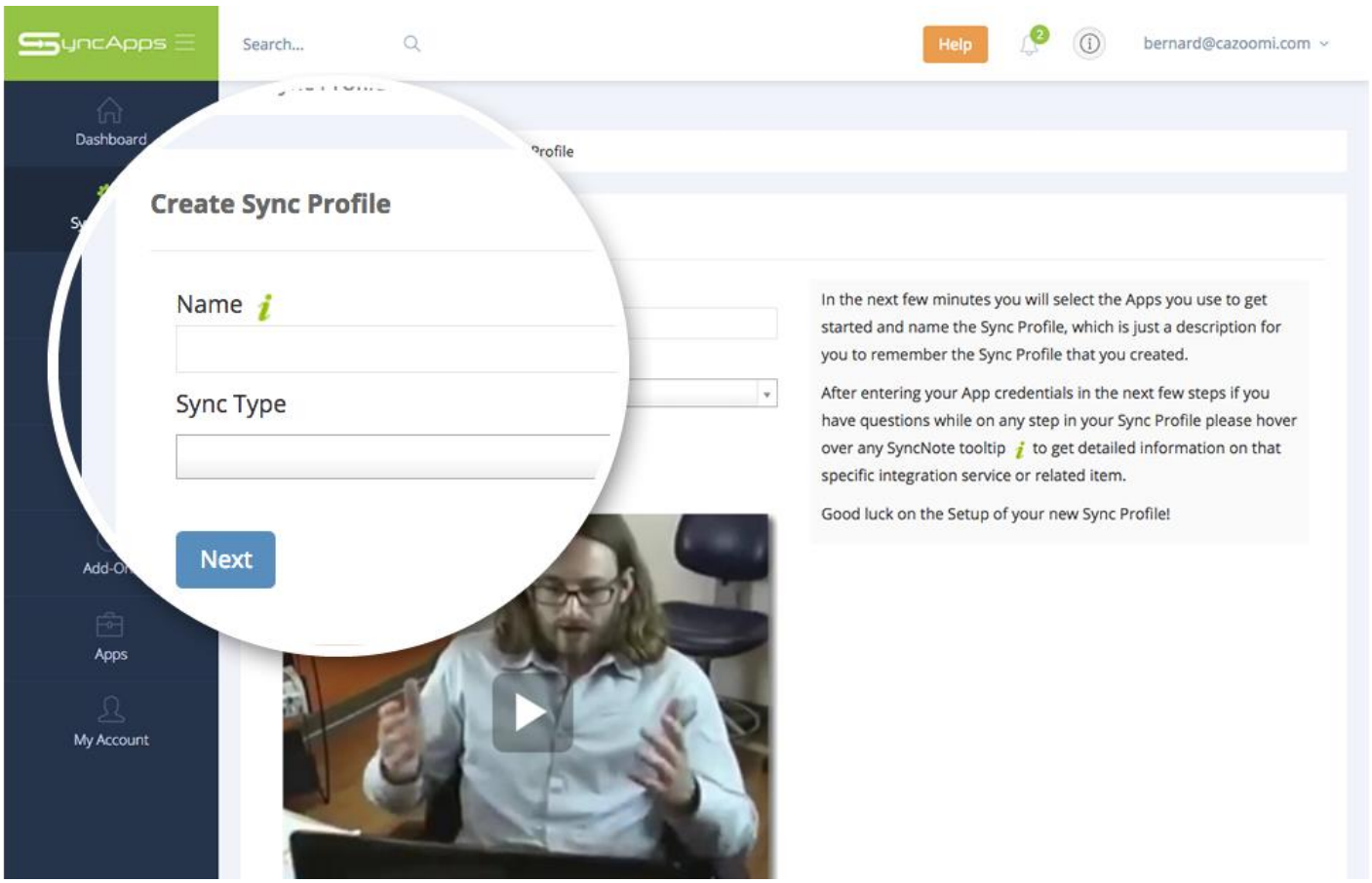
2 Enter Profile Name

The Sync Profile name is just a description for you to remember the Sync Profile that you will create now.



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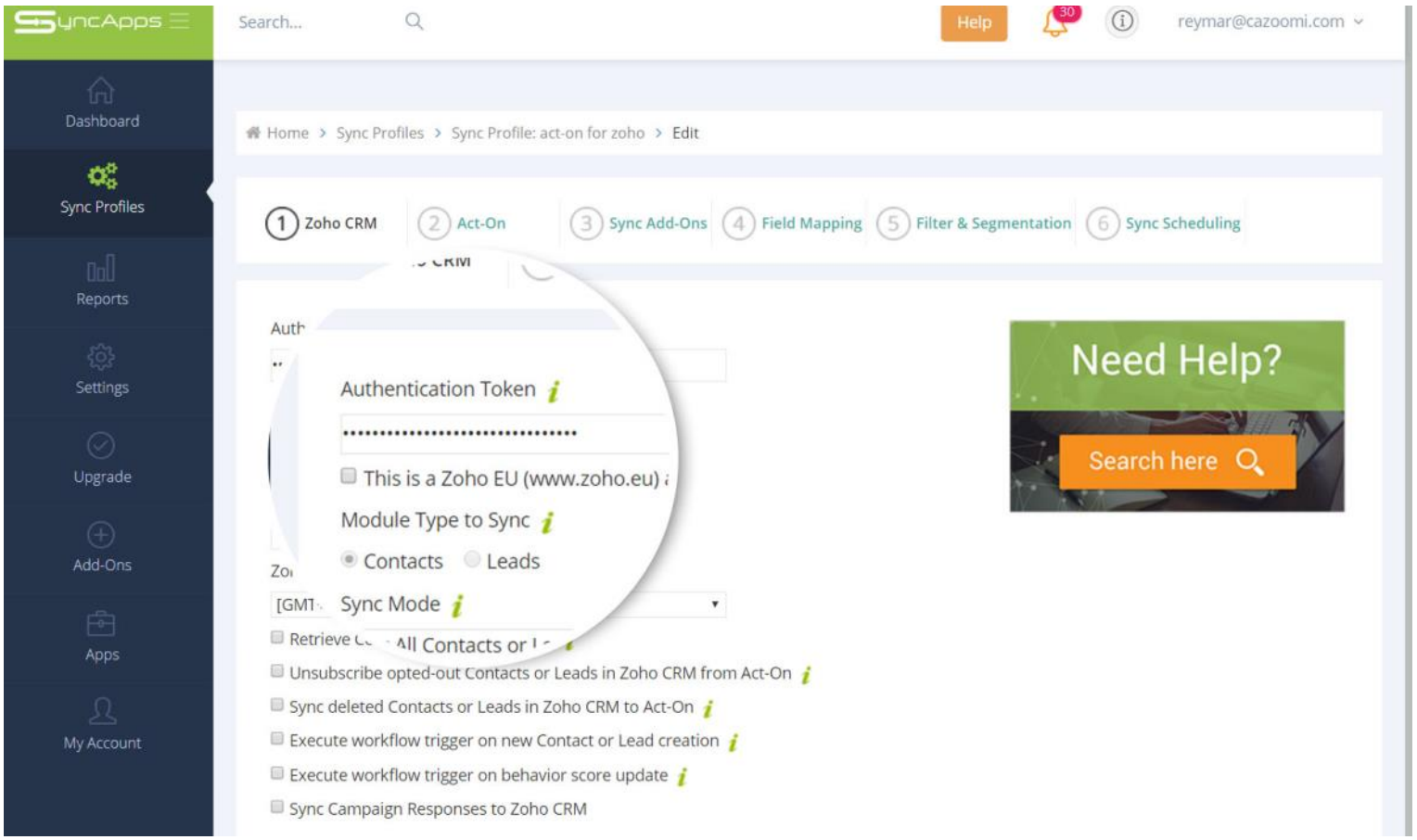
3 Enter Zoho CRM credentials

Grab your Zoho CRM credentials, and if you have questions, please hover over any SyncNote tooltip to get more information.



Do not append your Salesforce password to the Security Token. If you do not know your security token, please follow steps in the following link to get your new security token: https://help.salesforce.com/apex/HTViewHelpDoc?id=user_security_token.htm. You can leave the security token blank but you will need to add SyncApps server IP Addresses (50.57.94.62 and 162.242.161.75) to your Salesforce.com trusted networks.

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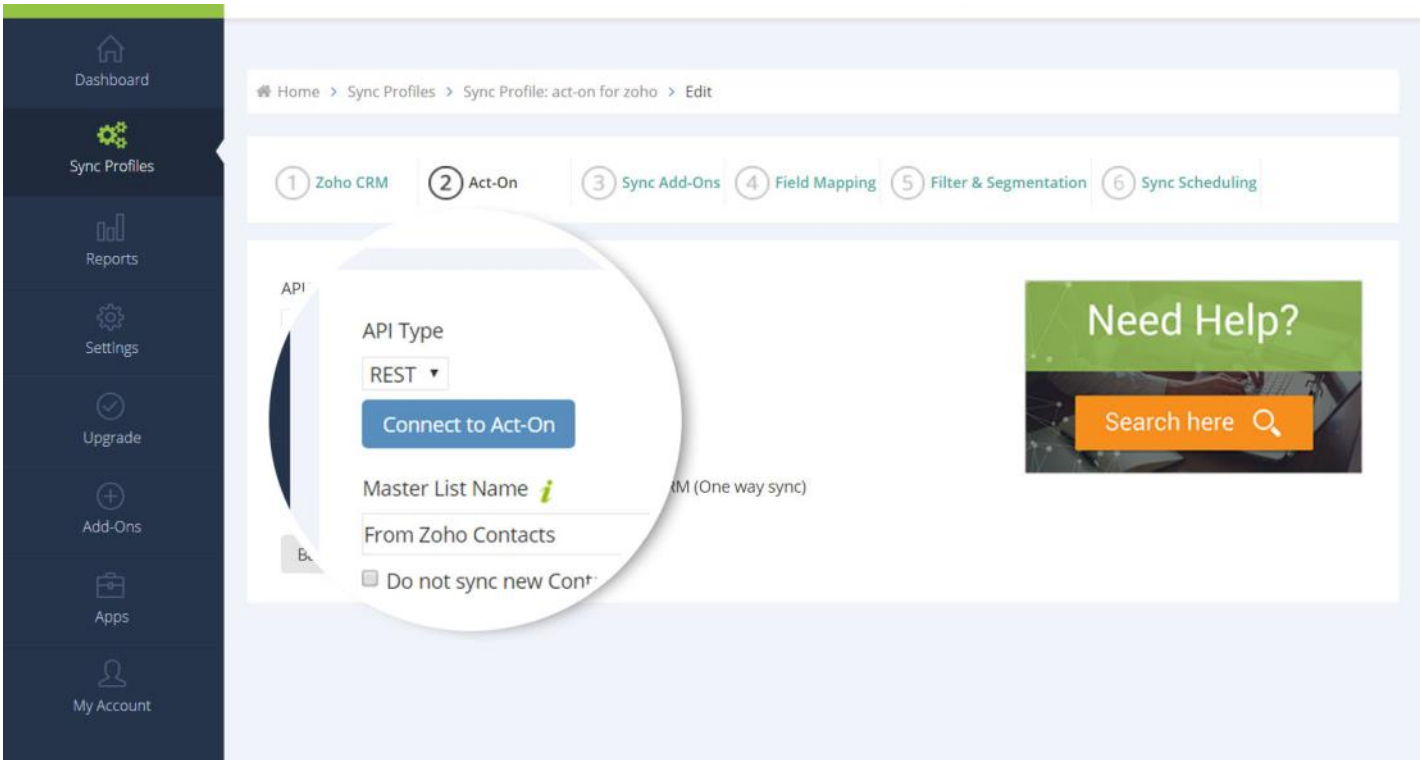
4 Insert your Act-On Credentials

Enter Act-On credentials. Connecting to Act-On is super simple. Just press "Connect to Act-On" button to log into your account to validate the Sync Profile.



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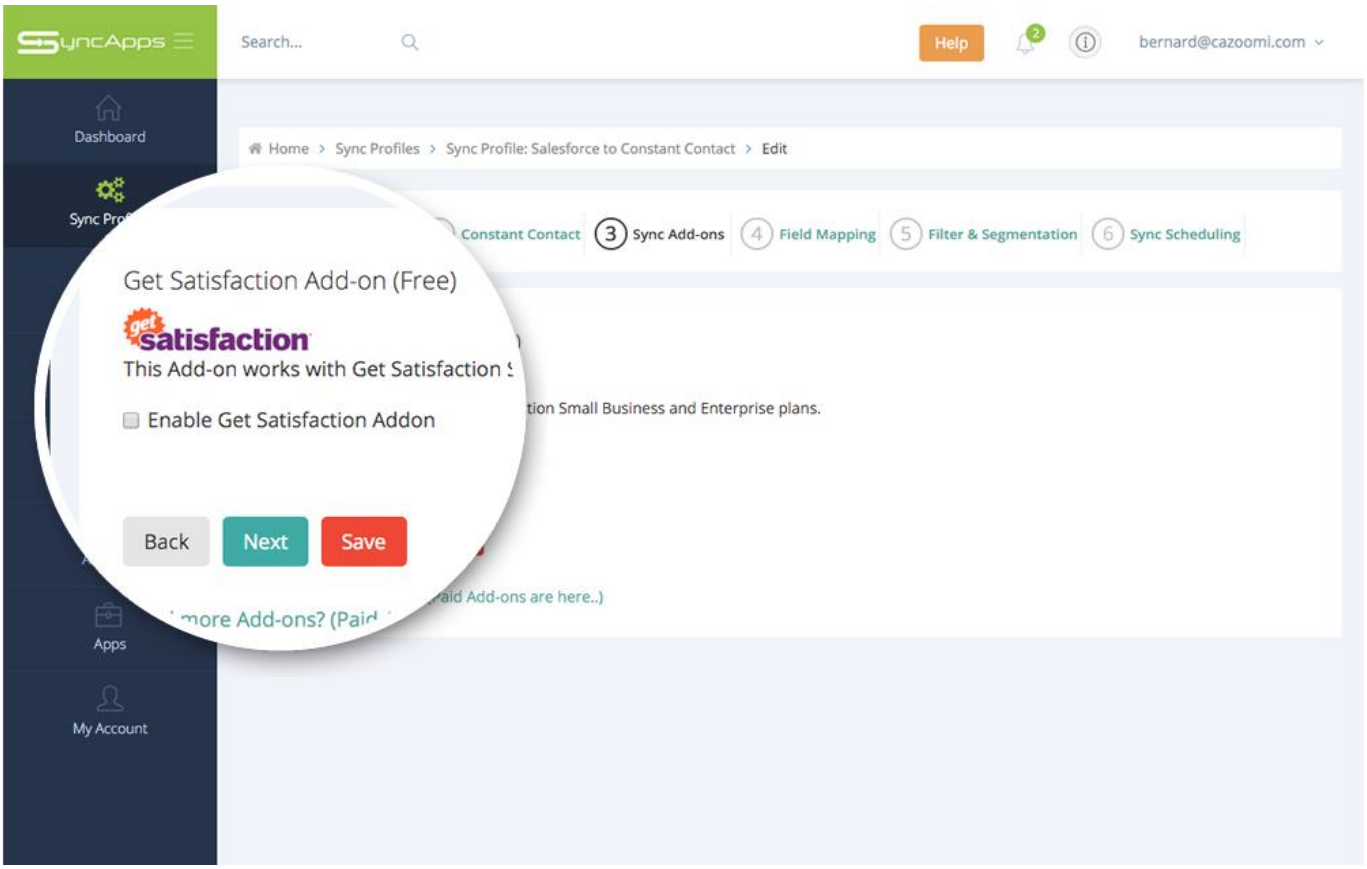
5 Sync Add-Ons

The SyncApps Add-Ons screen allows you to select those you want and more for each App you connect.



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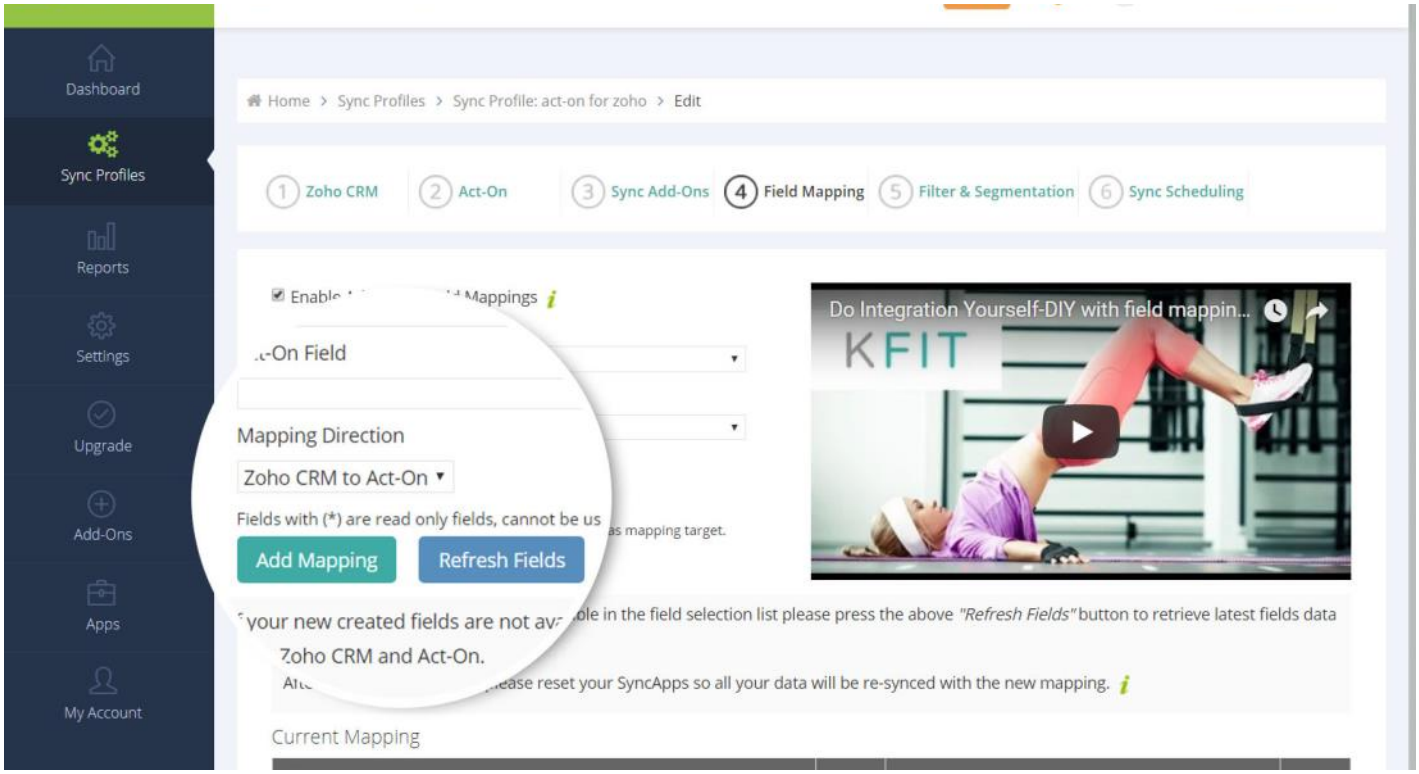
6 Field Mapping

Field mapping from your chosen App 1 & App 2 allows you to update existing or new records with ease.



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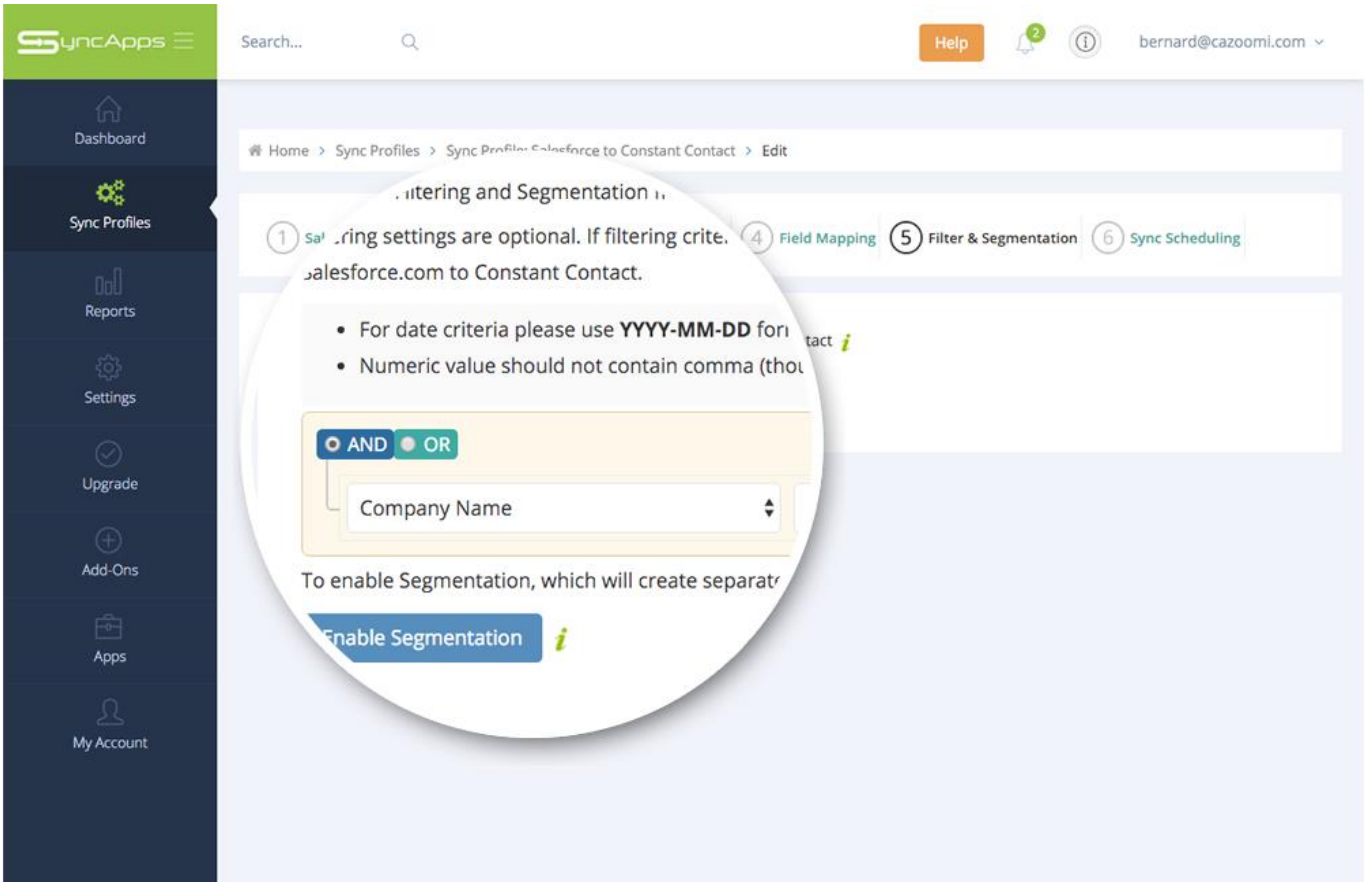
7 Filter and Segmentation

Filtering takes CRM record, filters based on the specified criteria and syncs records into your target application. Segmentation syncs record from each defined segment into separate lists.



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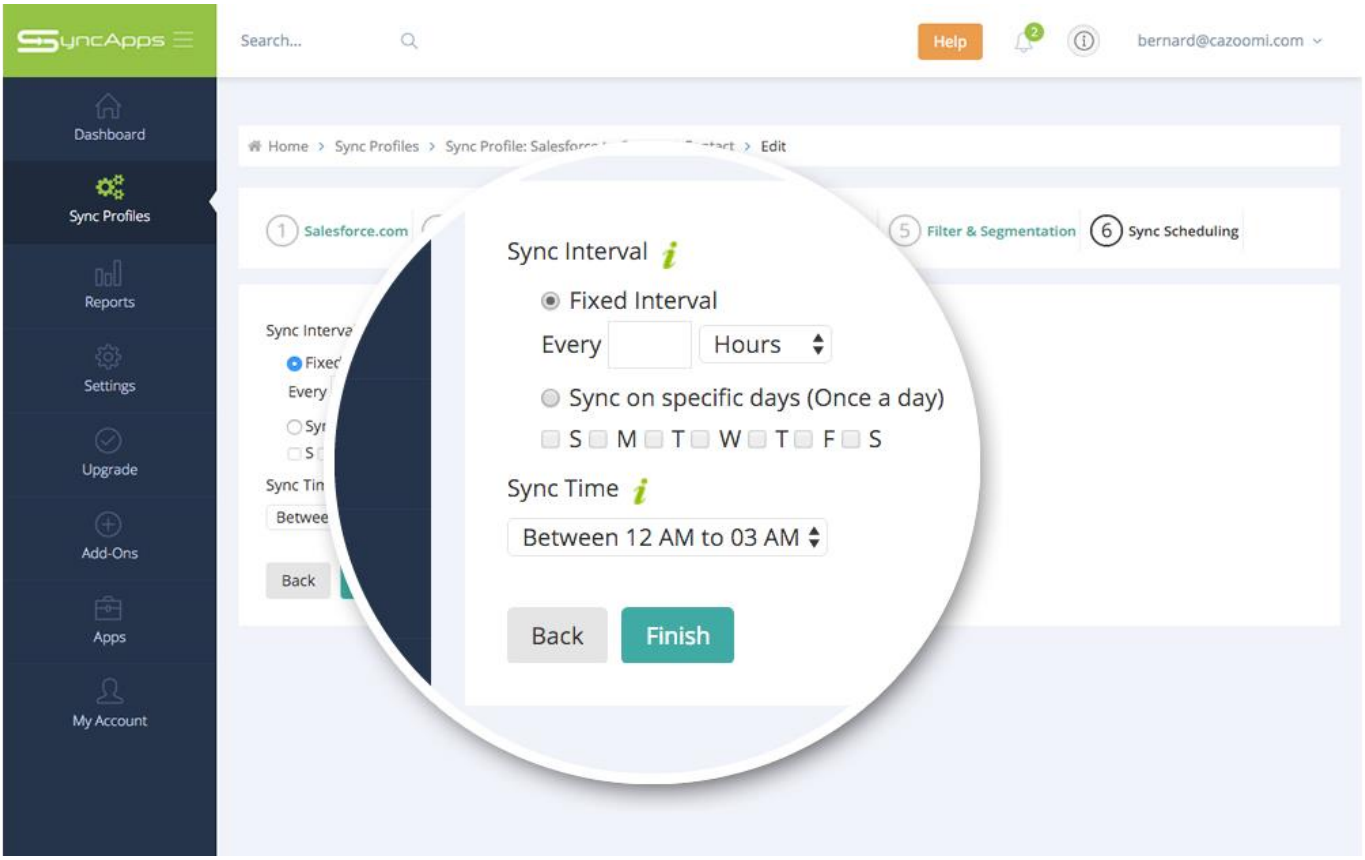
8 Sync Scheduling

Sync scheduling can be set up on paid plans. Sync On-Demand is available in all trials to allow quick testing of your Apps integration.



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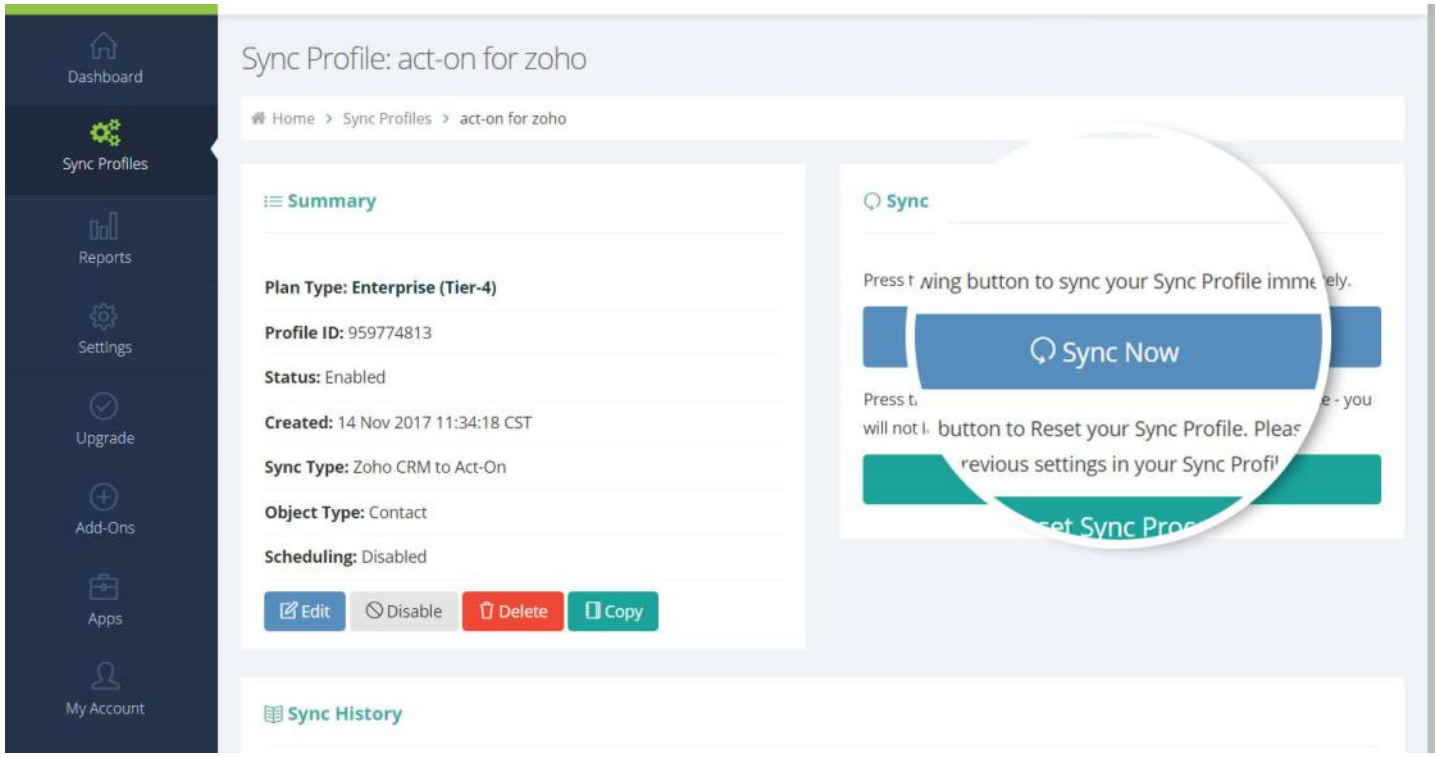
9 Sync Now

Press the "Sync Now" button from your Sync Profile screen to sync your data immediately.



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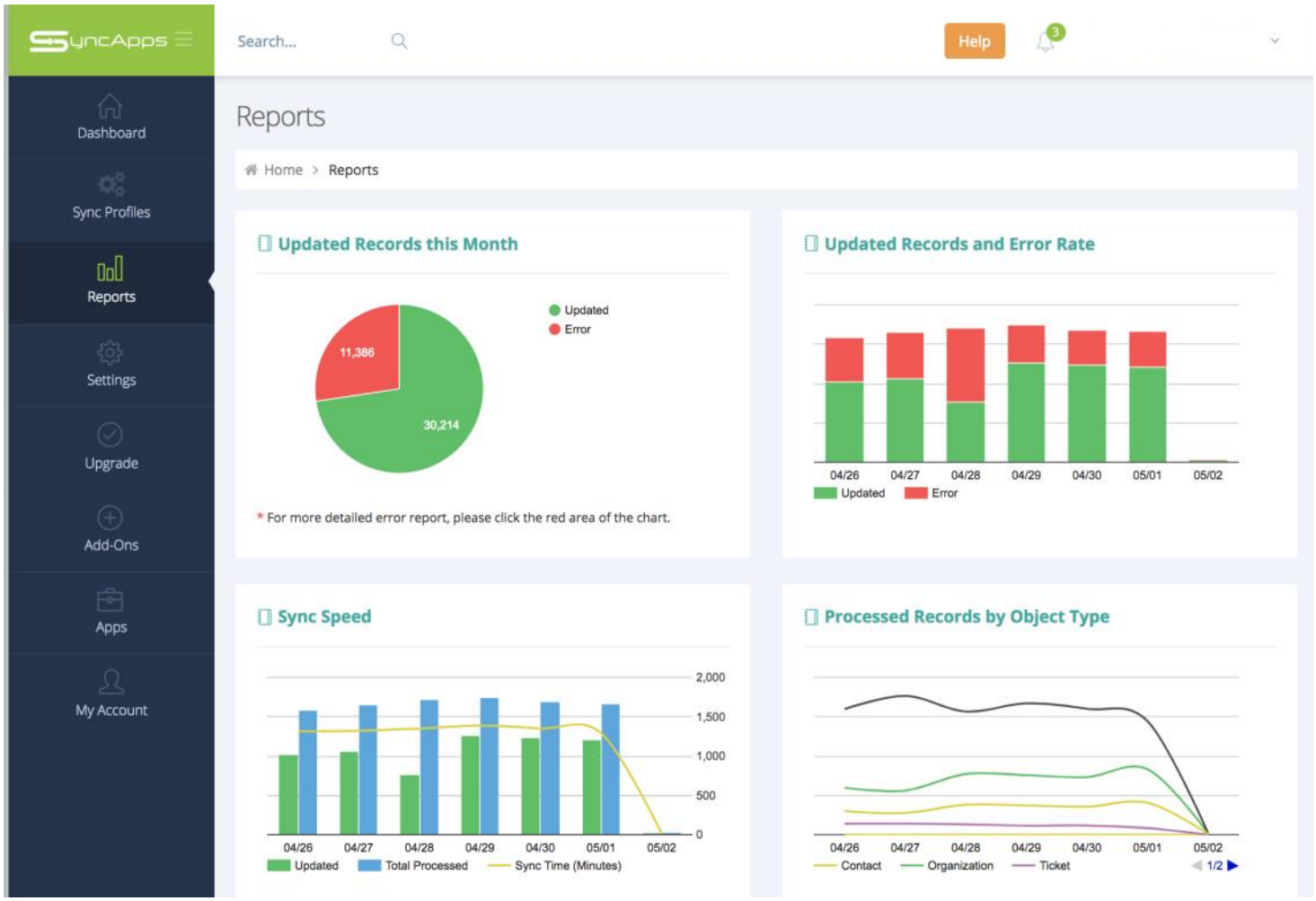
9 Reports



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Cazoomi Story

SyncApps® by Cazoomi offers an integration framework available to unite your company's data.

Deploying Software-as-a-Service for Financials, CRM & Marketing, eCommerce or Support?

SyncApps® by Cazoomi is the easiest way to synchronize your applications without breaking the bank. Once available to only Fortune 1000 companies, Cazoomi introduces a way for your business applications to talk to each other for less than the price of a Netflix subscription.

See other small businesses, education and nonprofits to even large enterprises who started on a Free Trial.

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