

Setup Guide:

Act-On Software for Zoho CRM

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.

The screenshot shows the top section of the Cazoomi website. At the top right, there are links for 'Login' and 'More About Cazoomi'. The main navigation bar includes 'HOW IT WORKS', 'PRICING', 'BLOG', 'NONPROFITS', 'SUPPORT', and a prominent orange 'GET STARTED' button. The main banner features the Cazoomi logo on the left and a graphic on the right showing 'Zoho CRM' and 'act-on' logos connected by a plus sign. The banner text reads 'Sync Zoho CRM to Act-On' and includes a 'Get Started' button with '2 Weeks Free' and a pricing box stating 'Plans Starting at \$49.99/month/company'. Below the banner is a horizontal menu with icons and labels for 'Major Features', 'Pricing', 'Product Support', 'How it Works', 'Get Help with Zoho', 'About', and 'Videos'. The 'Major Features' section is expanded, showing a list of four 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.



Questions? Contact our 24/7 support team.

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

Contact Us!

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.

START YOUR SYNCAPPS FREE TRIAL TODAY

Experience 2 weeks trial with access to all SyncApps, on-demand sync ability and more!

EMAIL ADDRESS

Email address will be used for login.

FIRST NAME

LAST NAME

COMPANY NAME

PASSWORD

6-character minimum; case sensitive

RE-TYPE PASSWORD

By pressing "Start Free Trial", you agree to Cazoomi's [Terms of Service and Privacy Policy](#).

[START FREE TRIAL](#)

How Your Trial Works

After you create your account, you get instant access to all Sync Profiles for 2 weeks & we don't require a credit card during the trial, so you get to try Cazoomi risk-free.

If you haven't upgraded yet within the 2 weeks trial, our Cazoomi team will send you an email reminder before your trial ends so you will still have some time to choose one of our three subscription plans.

When you choose the subscription plan that is right for you, your account will be instantly upgraded.

Join These Happy SyncApps Customers

Jcurve **UB** **LYTRO**



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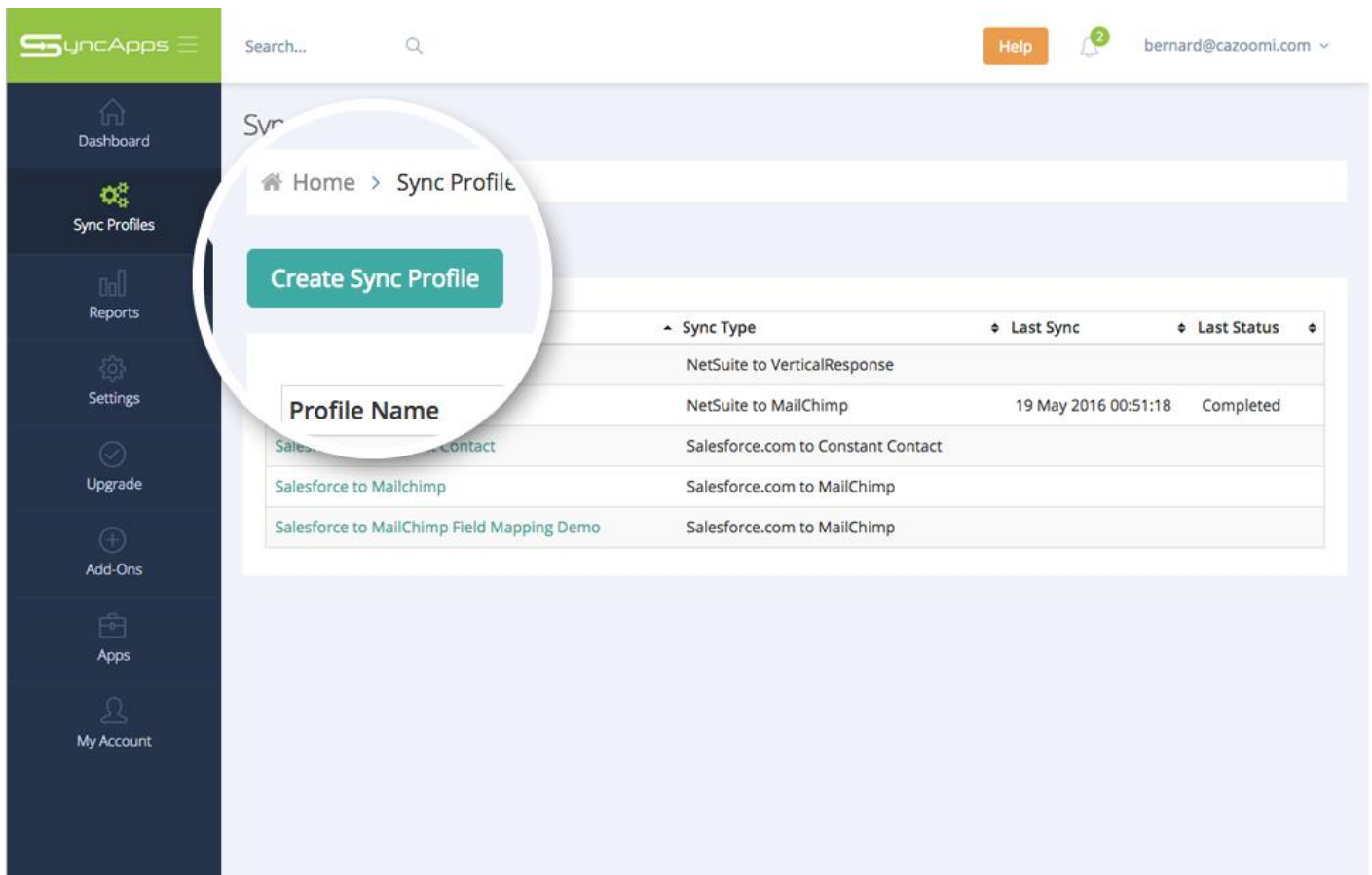
MAJOR FEATURES

- 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.

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.



The screenshot shows the SyncApps web application interface. The left sidebar contains navigation options: Dashboard, Sync Profiles, Reports, Settings, Upgrade, Add-Ons, Apps, and My Account. The main content area displays a breadcrumb trail 'Home > Sync Profile' and a prominent green 'Create Sync Profile' button. Below this is a table of existing sync profiles.

Profile Name	Sync Type	Last Sync	Last Status
NetSuite to VerticalResponse	NetSuite to VerticalResponse		
NetSuite to MailChimp	NetSuite to MailChimp	19 May 2016 00:51:18	Completed
Salesforce.com to Constant Contact	Salesforce.com to Constant Contact		
Salesforce to MailChimp	Salesforce.com to MailChimp		
Salesforce to MailChimp Field Mapping Demo	Salesforce.com to MailChimp		

i 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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Enter Profile Name

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

Create Sync Profile

Name *i*

Sync Type

Next

In the next few minutes you will select the Apps you use to get started and name the Sync Profile, which is just a description for you to remember the Sync Profile that you created.

After entering your App credentials in the next few steps if you have questions while on any step in your Sync Profile please hover over any SyncNote tooltip *i* to get detailed information on that specific integration service or related item.

Good luck on the Setup of your new Sync Profile!



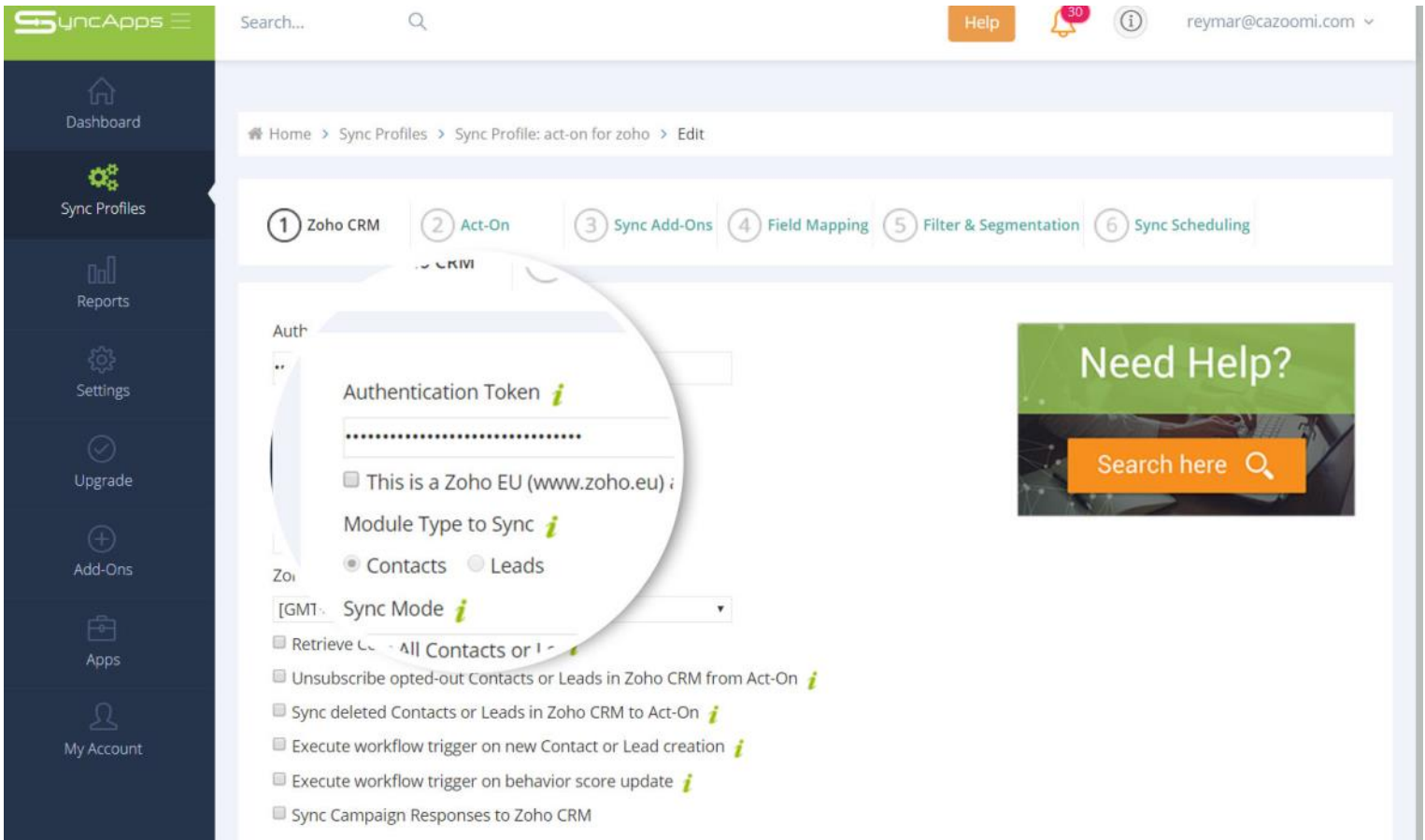
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3 Enter Zoho CRM credentials

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.

The screenshot displays the SyncApps interface for editing a sync profile. A breadcrumb trail at the top reads: Home > Sync Profiles > Sync Profile: act-on for zoho > Edit. Below this is a progress bar with six steps: 1 Zoho CRM, 2 Act-On (highlighted), 3 Sync Add-Ons, 4 Field Mapping, 5 Filter & Segmentation, and 6 Sync Scheduling. A circular callout focuses on the 'Act-On' configuration area, which includes:

- API Type: REST (dropdown menu)
- Connect to Act-On (blue button)
- Master List Name: From Zoho Contacts (with an info icon)
- From Zoho Contacts (text input field)
- Do not sync new Contacts (checkbox)

On the right side of the interface, there is a 'Need Help?' section with a search bar containing the text 'Search here' and a magnifying glass icon. A dark sidebar on the left contains navigation icons for Dashboard, Sync Profiles, Reports, Settings, Upgrade, Add-Ons, Apps, and My Account.



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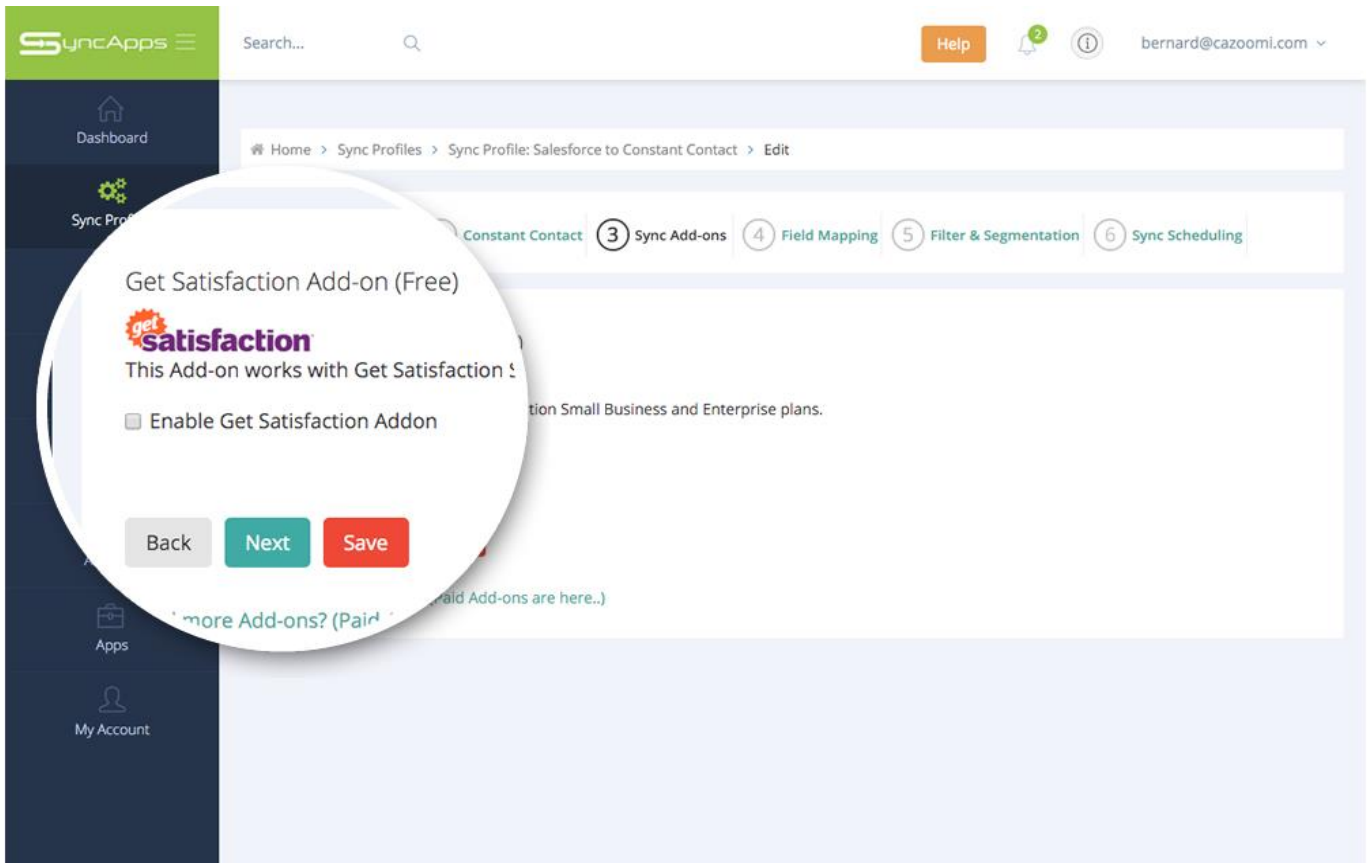
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Sync Add-Ons

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



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Field Mapping

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

Home > Sync Profiles > Sync Profile: act-on for zoho > Edit

1 Zoho CRM 2 Act-On 3 Sync Add-Ons 4 Field Mapping 5 Filter & Segmentation 6 Sync Scheduling

Enable Field Mappings ⓘ

Act-On Field

Mapping Direction

Zoho CRM to Act-On ▼

Fields with (*) are read only fields, cannot be used as mapping target.

[Add Mapping](#) [Refresh Fields](#)

your new created fields are not available in the field selection list please press the above "Refresh Fields" button to retrieve latest fields data

Zoho CRM and Act-On.

Act-On please reset your SyncApps so all your data will be re-synced with the new mapping. ⓘ

Current Mapping

Do Integration Yourself-DIY with field mappin... KFIT



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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.

The screenshot displays the SyncApps interface for configuring a sync profile. The left sidebar contains navigation options: Dashboard, Sync Profiles, Reports, Settings, Upgrade, Add-Ons, Apps, and My Account. The main content area shows a breadcrumb trail: Home > Sync Profiles > Sync Profile Salesforce to Constant Contact > Edit. A progress bar at the top indicates the current step is '5 Filter & Segmentation', with other steps being '1 Salesforce settings are optional. If filtering criteria...', '4 Field Mapping', and '6 Sync Scheduling'. Below the progress bar, there are instructions: 'For date criteria please use YYYY-MM-DD for contact' and 'Numeric value should not contain comma (though)'. A dropdown menu is open, showing 'AND' selected and 'OR' as an option. Below the dropdown is a field labeled 'Company Name'. At the bottom of the callout, there is a blue button labeled 'Enable Segmentation' with an information icon.



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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.

SyncApps

Search...

Help

2

1

bernard@cazoomi.com

Home > Sync Profiles > Sync Profile: Salesforce.com > Contact > Edit

1 Salesforce.com

5 Filter & Segmentation

6 Sync Scheduling

Sync Interval *i*

Fixed Interval

Every Hours

Sync on specific days (Once a day)

S M T W T F S

Sync Time *i*

Between Between 12 AM to 03 AM

Back Finish



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

The screenshot shows the 'Sync Profile: act-on for zoho' page. On the left is a dark sidebar with navigation options: Dashboard, Sync Profiles, Reports, Settings, Upgrade, Add-Ons, Apps, and My Account. The main content area has a breadcrumb trail: Home > Sync Profiles > act-on for zoho. Below this is a 'Summary' section with the following details:

- Plan Type:** Enterprise (Tier-4)
- Profile ID:** 959774813
- Status:** Enabled
- Created:** 14 Nov 2017 11:34:18 CST
- Sync Type:** Zoho CRM to Act-On
- Object Type:** Contact
- Scheduling:** Disabled

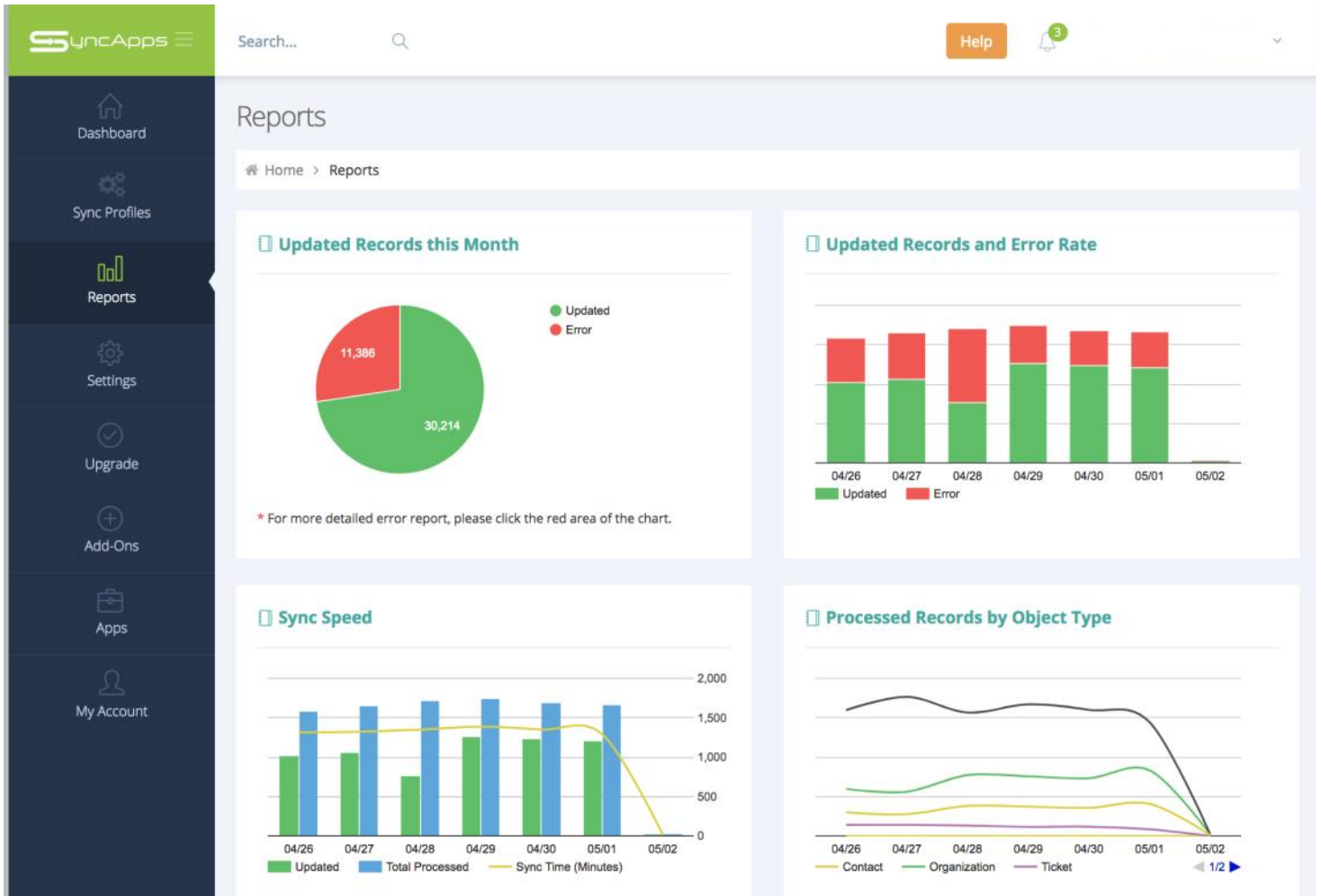
At the bottom of the summary are four buttons: Edit, Disable, Delete, and Copy. To the right of the summary is a 'Sync' section with a large blue 'Sync Now' button. A white circular callout highlights this button, with text that reads: 'Press the Sync Now button to sync your Sync Profile immediately.' Below the button, there is a 'Reset Sync Profile' button and text stating: 'Press the Reset Sync Profile button to Reset your Sync Profile. Please note that this will not restore your previous settings in your Sync Profile.'



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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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