



# Extension For Insightly

2nd March, 2020



# INSIGHTLY EXTENSION FOR ZOHO CRM

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## Extension Header

Towerdata Task Manager

## Title Header

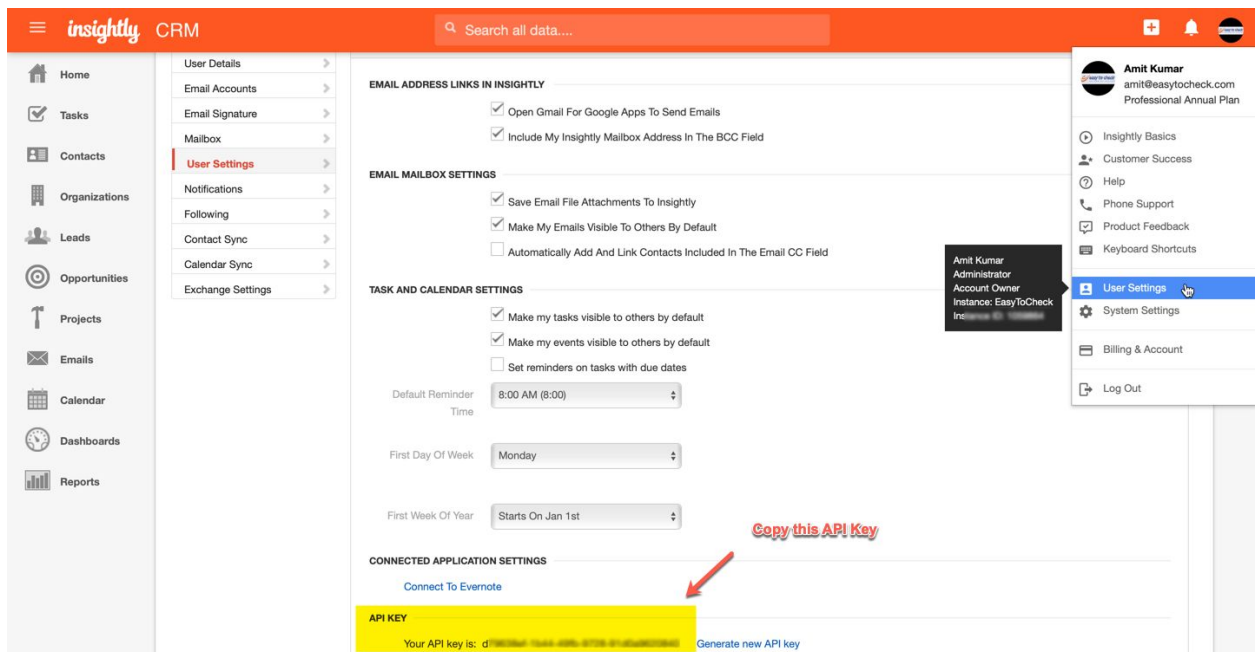
Manage Insightly CRM projects and their related information from Zoho Projects

## Key Features

- Create Task in Insightly from Zoho Projects
- Create Contact, Opportunity & Organisation for Insightly from Zoho Projects
- View related Insightly project details like Contact, Opportunity & Organisation from Zoho Projects

## Extension Working

- Install the extension
- Get Insightly API key from Manage Account > User Settings



The screenshot displays the 'insightly CRM' user interface. On the left is a navigation sidebar with icons for Home, Tasks, Contacts, Organizations, Leads, Opportunities, Projects, Emails, Calendar, Dashboards, and Reports. The main content area is titled 'User Settings' and contains several sections: 'EMAIL ADDRESS LINKS IN INSIGHTLY' with checkboxes for Google Apps and Mailbox; 'EMAIL MAILBOX SETTINGS' with checkboxes for attachments and visibility; 'TASK AND CALENDAR SETTINGS' with checkboxes for visibility and reminder options; and 'CONNECTED APPLICATION SETTINGS' with a 'Connect To Evernote' button. At the bottom, the 'API KEY' section is highlighted in yellow, showing a partially visible API key and a 'Generate new API key' button. A red arrow points to the API key with the text 'Copy this API Key'. On the right side, a user profile dropdown menu is open, showing the user's name 'Amit Kumar', email 'amit@easytocheck.com', and plan 'Professional Annual Plan', along with various settings and support options.

- Copy & paste this key to CRM while installing the extension . **Please remember to keep the password blank**

### Basic Authentication Details

Connection Name : insightly

Please fill the param details

Enter your UserName

07251646-0029-4080-a83e-40b77eab7916

Enter your Password

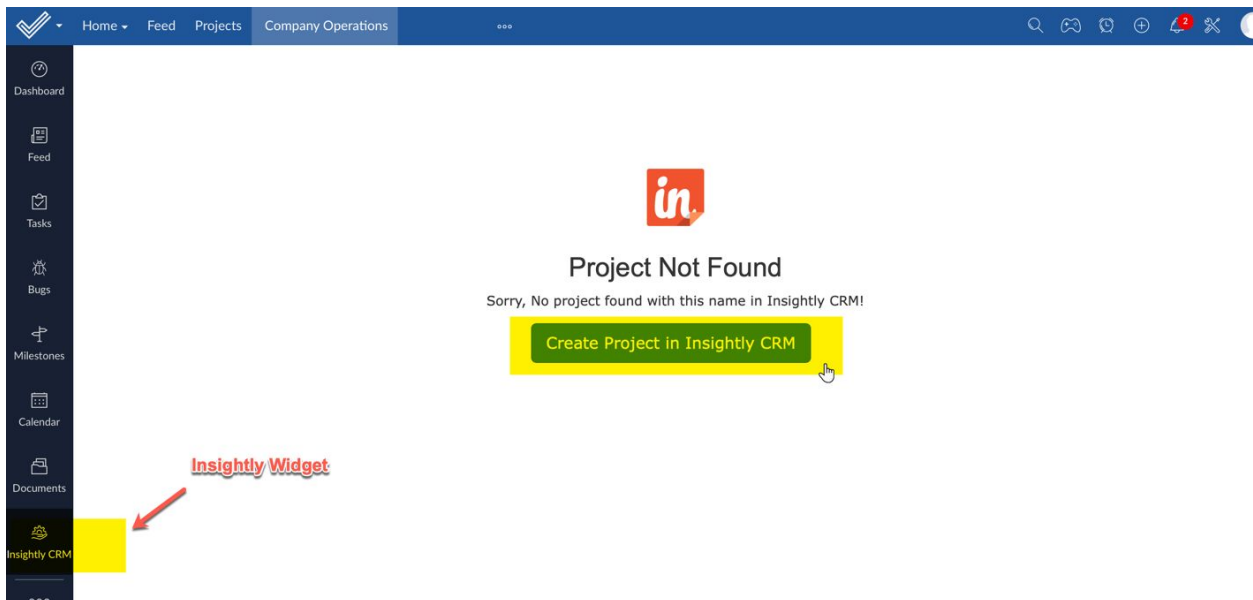
Save Details

Cancel

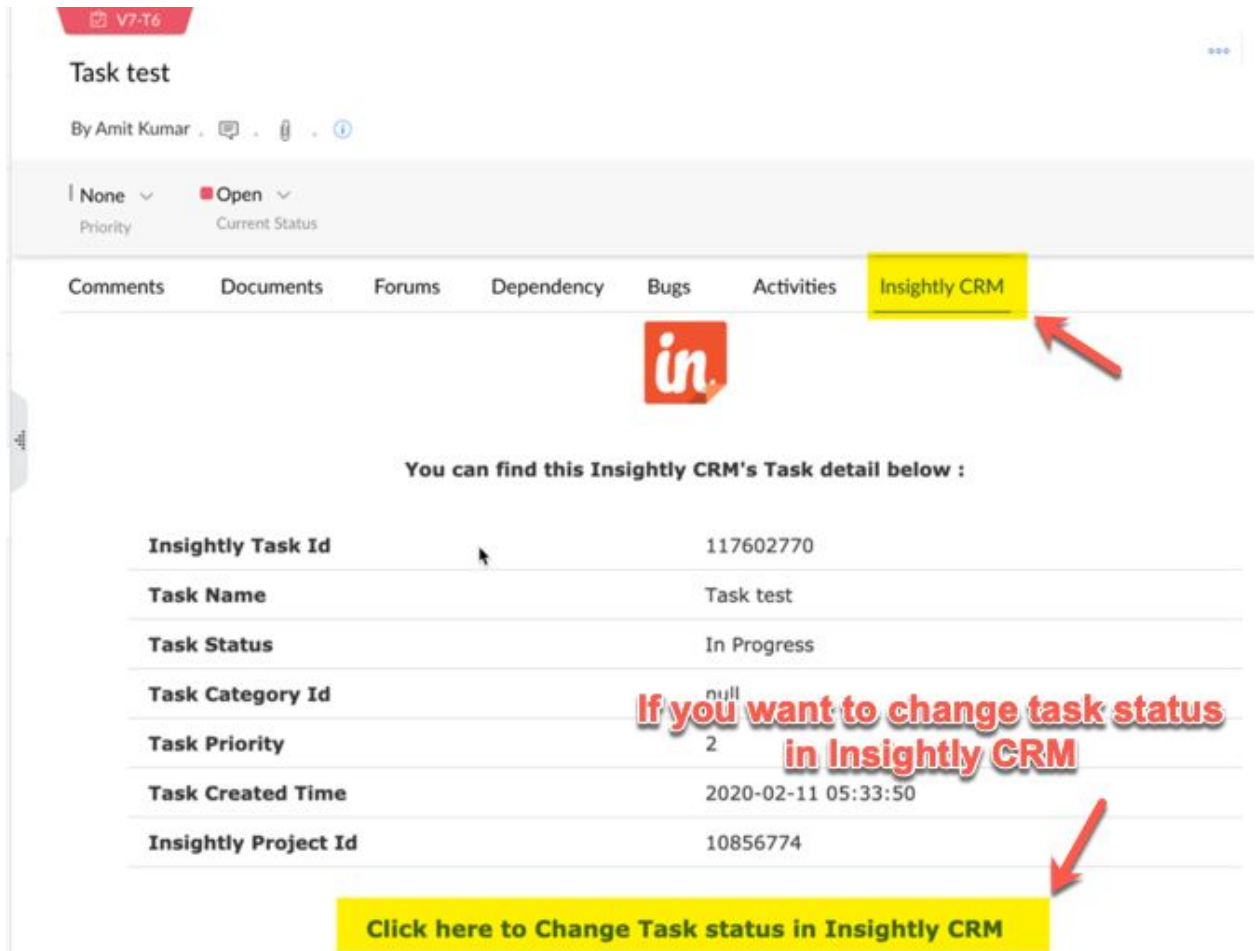
**Leave password blank**




- Now you are ready to use the extension . Select any project and go to “Insightly CRM” widget.

*Notes:* If the project name is the same between Zoho and Insightly CRM. The related Zoho Projects will be visible automatically. Otherwise you can click on “Create Project in Insightly CRM” button to create the project in Insightly CRM.




- Create Task in Insightly from Zoho Projects : You may also want to add tasks for associated Insightly projects . This you can easily perform browsing any task in Zoho Projects (only the one that is already associated with Insightly CRM) and selection Insightly widget.



**Task test**  
By Amit Kumar .   

None  Open   
Priority Current Status

Comments Documents Forums Dependency Bugs Activities **Insightly CRM**



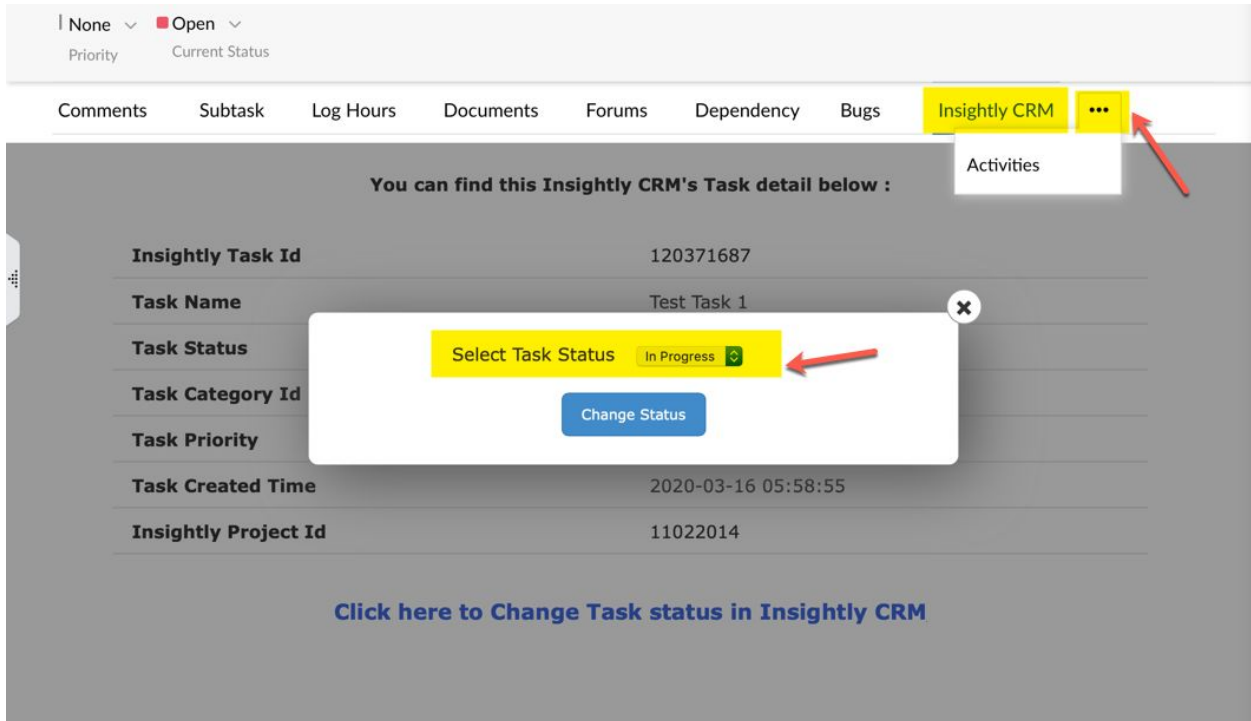
You can find this Insightly CRM's Task detail below :

Insightly Task Id	117602770
Task Name	Task test
Task Status	In Progress
Task Category Id	null
Task Priority	2
Task Created Time	2020-02-11 05:33:50
Insightly Project Id	10856774

**If you want to change task status in Insightly CRM**


**Click here to Change Task status in Insightly CRM**

- Change Task status in Insightly CRM : You can also change the status from Zoho Projects for associated Insightly Task.



The screenshot displays the Insightly CRM interface. At the top, there are filters for 'None' (Priority) and 'Open' (Current Status). A navigation bar includes 'Comments', 'Subtask', 'Log Hours', 'Documents', 'Forums', 'Dependency', 'Bugs', 'Insightly CRM', and a menu icon (three dots). A red arrow points to the menu icon, which has a dropdown menu with 'Activities' visible.

Below the navigation bar, a heading reads: "You can find this Insightly CRM's Task detail below :".

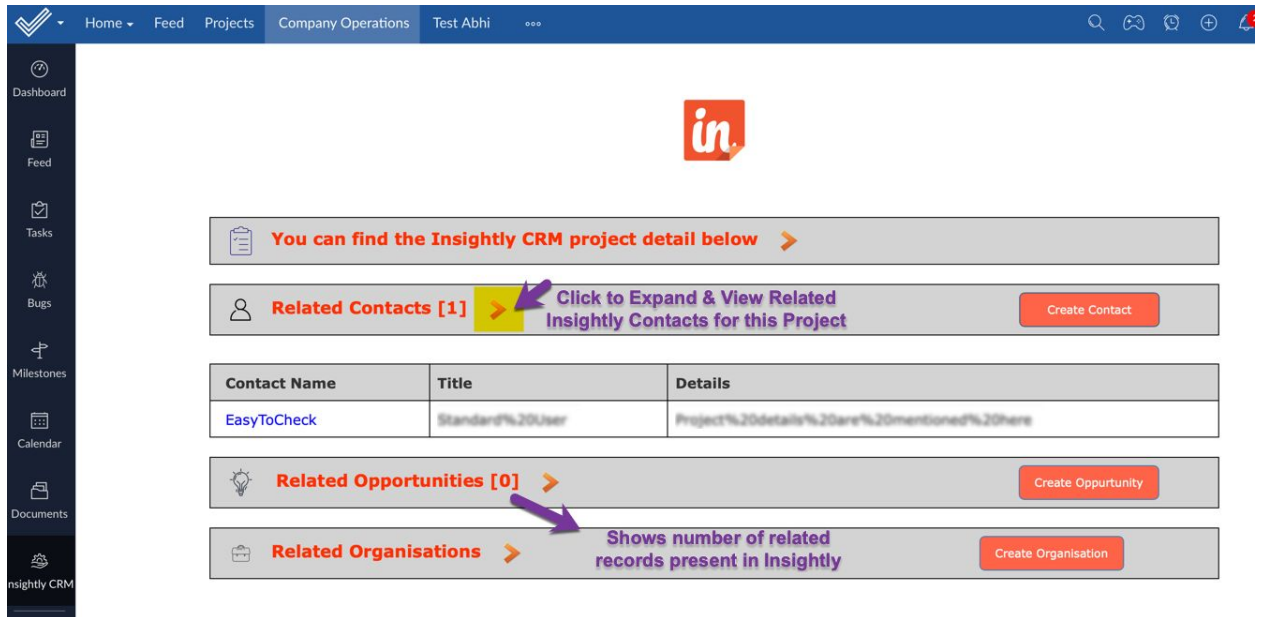
<b>Insightly Task Id</b>	120371687
<b>Task Name</b>	Test Task 1
<b>Task Status</b>	<b>Select Task Status</b> In Progress 
<b>Task Category Id</b>	
<b>Task Priority</b>	
<b>Task Created Time</b>	2020-03-16 05:58:55
<b>Insightly Project Id</b>	11022014

A modal window is overlaid on the 'Task Status' field. It contains a 'Change Status' button and a dropdown menu currently set to 'In Progress'. A red arrow points to the dropdown menu.

At the bottom of the interface, there is a link: [Click here to Change Task status in Insightly CRM](#)

- View & Create related “Contacts”, “Opportunities” & “Organisations” from Zoho projects:

Zoho project users can create and view related Insightly “Contacts”, “Opportunities” & “Organisations”. When clicked on “Create” button a new window pops up where the relevant fields have to be filled. Once saved the record is created automatically in Insightly CRM, while the same being presented to Zoho user as well.



**You can find the Insightly CRM project detail below** >

**Related Contacts [1]** > **Click to Expand & View Related Insightly Contacts for this Project** **Create Contact**

Contact Name	Title	Details
EasyToCheck	Standard%20User	Project%20details%20are%20mentioned%20here

**Related Opportunities [0]** > **Create Opportunity**

**Related Organisations** > **Shows number of related records present in Insightly** **Create Organisation**

## Short Description

This extension enables users to create projects in Insightly from Zoho Projects as well as associate the current Insightly projects into Zoho (project name is Insightly & Zoho Projects should match). Further Zoho Projects users can view Contact, Opportunity and Organisation for associated Insightly projects from Zoho Projects. This provides a fast, accurate and secure project management for Insightly CRM right from your Zoho Projects instance.

## Website Link

<https://www.easytocheck.com/insightly>

## End Note

This extension is developed by “EasyTocheck Software Solutions” and for any further assistance and customization , users can directly get in touch with us ([www.easytocheck.com](http://www.easytocheck.com)). We will update the extension with new updates which will be available to all existing customers at no extra cost. Publishing or copying the extension partially or contextually is strictly prohibited as the company holds the proprietorship for developing this connector which includes logic & integration workflow