



# Devart Connector for Zoho CRM from Excel

Devart Connector for Zoho CRM allows you to connect to Microsoft Excel, quickly and easily load data from Zoho CRM to Excel, instantly refresh data in an Excel workbook from Zoho CRM, edit these data, and save them back to Zoho CRM. It enables you to work with Zoho CRM contacts, accounts, opportunities, leads, calls, and other objects like with usual Excel worksheets, easily perform data cleansing and de-duplication, and apply all the Excel's powerful data processing and analysis capabilities to these data.

# Installation and Requirements

Devart Excel Add-ins are offered as separate add-ins for various databases and Cloud Data Sources.

To install Devart Excel Add-ins, download the installer from Devart Downloads page.

Run the downloaded installer and follow the instructions in the Wizard.

## Note

Microsoft Excel must be installed on the PC before installing Devart Excel Add-ins. The installation of Devart Excel Add-ins must be performed via user account with administrative privileges.

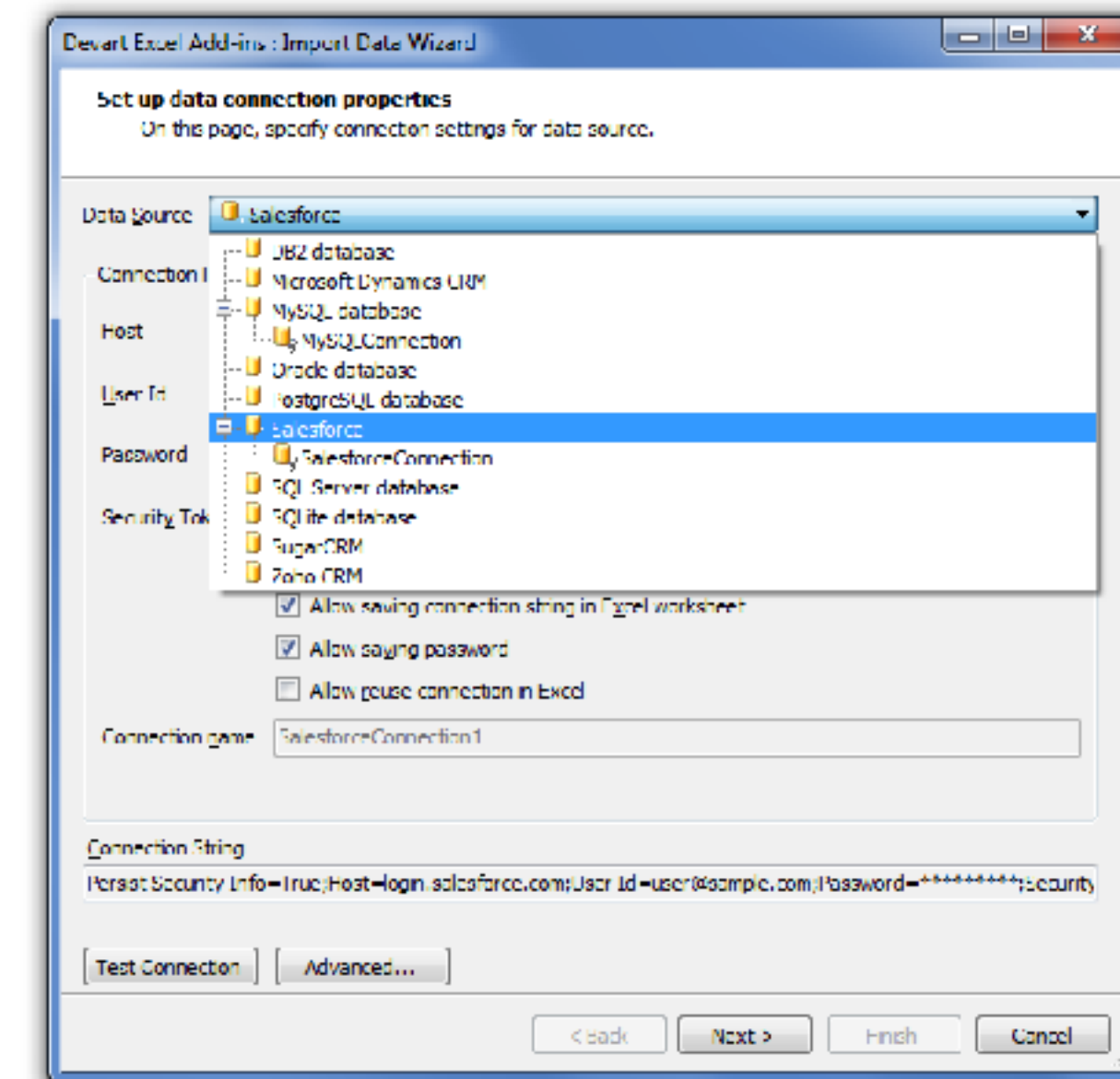
Devart Excel Add-ins also requires the following:

- .NET Framework 4.0 or higher
- Visual Studio 2010 Tools for Office Runtime
- Devart Excel Add-in for DB2 requires IBM DB2 .NET Data Provider to be installed on your computer (download and install the IBM Data Server Client package).

# Connecting and Importing Data

To connect to a database or a cloud data source and retrieve data, you should create and configure a connection or use an existing one.

1. On the ribbon, click the DEVART tab and then click the **Get Data** button. This will display the Connection Editor dialog box.



Connection Editor

2. In the Connection Editor dialog box, select your data source from the **Data Source** list. If you have stored connection for reusing it in Excel, you can select a saved connection to the required data source from the Data Source list.

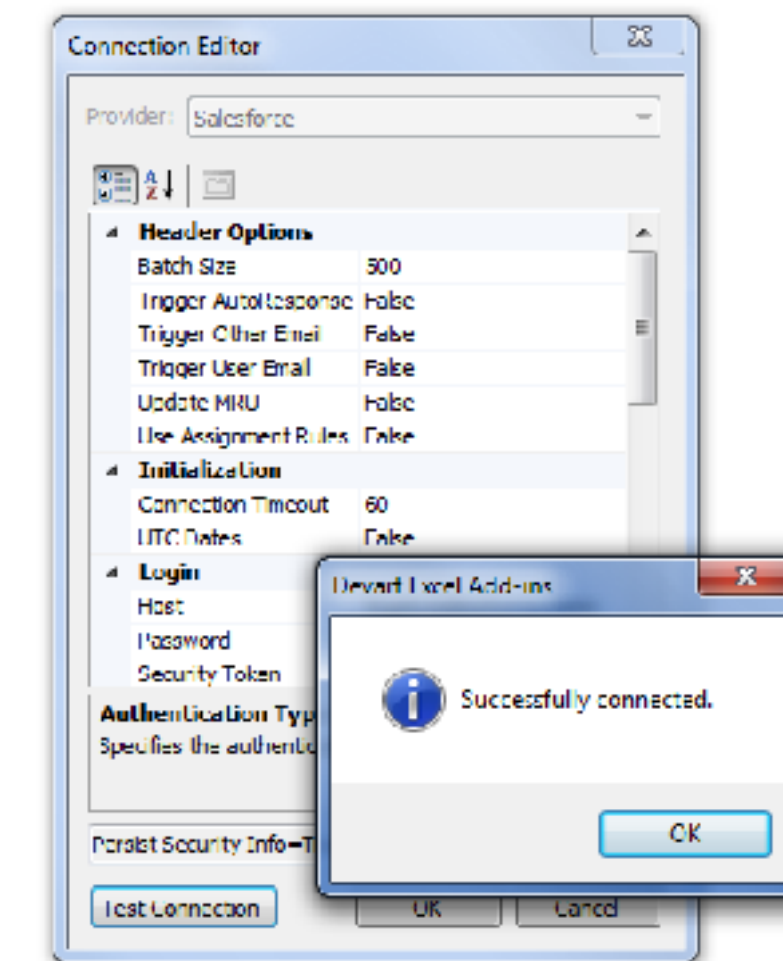
# Connecting and Importing Data

3. Specify the corresponding connection parameters in the fields below.

Each database or CRM server requires its own set of parameters for connection (username, password, etc.). Some of the parameters have the same names for different sources, but the parameter meaning may vary depending on the server. If a parameter is not used for a certain data provider, it will be unavailable in the Import Data Wizard and not used for connection. You can find details about connection string parameters for each supported data source in the Data Source Connection section of this manual. You can test the connection availability by clicking the **Test Connection** button.

Devart Excel Add-ins for QuickBooks and Mailchimp have a more specific procedure of creating a connection. See details for QuickBooks and Mailchimp.

In addition to required connection parameters, there are advanced options for more detailed connection tweaking. To access them, click the **Advanced** button and configure the connection string parameters. The generated Connection String is displayed at the bottom of the Connection Editor dialog box.



Connection Editor

# Connecting and Importing Data

3. In order not to specify the connection details each time when you need to work with the data source, connections may be saved and reused. For this:
  - Select the **Allow saving add-in specific data in Excel worksheet** to allow Devart Excel Add-ins save such information as queries, connections, etc. in the Excel document.
  - Select the **Allow saving connection string in Excel worksheet** check box. This will save the specified connection parameters in the Excel document.
  - You can additionally **allow saving password** by selecting the corresponding check box. (For QuickBooks the corresponding check box is **Allow saving security info**, for Zoho CRM it's **Allow saving authentication token**, for Mailchimp - **Allow saving API key** - in correspondence to the stored security parameters. There is no such check box for SQLite.)

## Note

It is highly not recommended if you plan to share the document with other people - they will also have your personal data.

- To allow reuse the saved connection in any Excel document, select the **Allow reuse connection in Excel** and give the connection a unique name to use it in future. Connection parameters will be saved on your PC and become available every time you run Excel.

You can set these options later in the Devart Excel Add-ins Security Options.

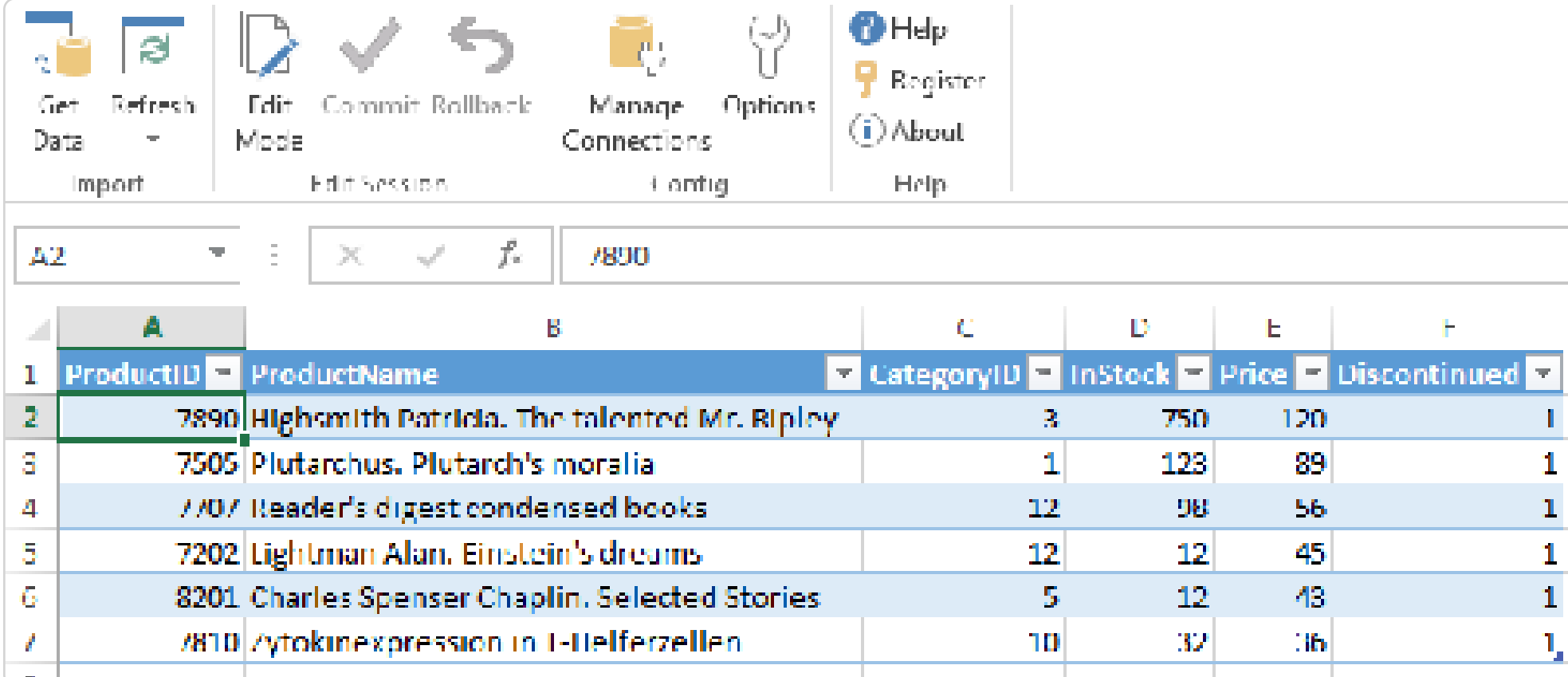




# Connecting and Importing Data

## 6. Click **Finish**.

After the Import Data Wizard is finished, the required data is retrieved and displayed in the active Excel sheet.



The screenshot shows the Microsoft Excel interface with the 'Import Data' ribbon active. The ribbon includes buttons for 'Get Data', 'Refresh', 'Edit Mode', 'Commit', 'Rollback', 'Manage Connections', 'Options', 'Help', 'Register', and 'About'. Below the ribbon, the active cell is A2, containing the formula =800. The main area displays a table with the following data:

	A	B	C	D	E	F
1	ProductID	ProductName	CategoryID	InStock	Price	Discontinued
2	7890	Highsmith Patricia. The talented Mr. Ripley	3	750	120	1
3	7505	Plutarchus. Plutarch's moralia	1	123	89	1
4	/707	Reader's digest condensed books	12	98	56	1
5	7202	Lightman Alan. Einstein's dreams	12	12	45	1
6	8201	Charles Spenser Chaplin. Selected Stories	5	12	43	1
7	/810	/ytokineexpression in I-Helferzellen	10	32	16	1

Now you can work with the retrieved data right in the Excel book and apply changes to a database or a cloud data source if needed.

# Managing Connections

Creating and saving connections is described above in the paragraph 3. Here we will explain how to manage existing connections.

Click the **Manage Connections** button on the ribbon. In the appeared Connections dialog box, you will find the list of Data Sources and connections.

In the Connections dialog box, you can do the following:

- **Create new connections.** For this, right-click on the needed data source name and select **New Connection** (or press the Insert key). The further process of creating a connection is described above.
- **Delete existing connections.** Just select the connection you want to delete and press Delete on the keyboard (or right-click on the connection, select **Delete**).
- **Rename connection.** Right-click on the connection, select **Rename** (or press F2).
- You may want to **edit connection** parameters. For this, double-click on the needed connection - the Connection Editor dialog box will open.