

Help Documentation

Telegram to Zoho CRM

Extension link :

<https://crm.zoho.com/market/installPrivatePlugin.do?portalName=pratyushsowriraj&nameSpace=telebot&versionIndex=4580338000000189005>

Note :

Before installing the extension , please contact to the developer. The render server needs to be deployed in order to use the services of the extension.

Contact Information :

Email : pratyushsowrirajan@gmail.com

Phone : +91 9384843883

Introduction :

This extension connects **Zoho CRM** with **Telegram** using a bot integration. It allows users to receive CRM updates in Telegram and also interact with CRM using Telegram commands.

The integration supports two-way communication:

- CRM can send record updates (like leads or deals) to Telegram.
- Users can type bot commands in Telegram to fetch or create CRM records.

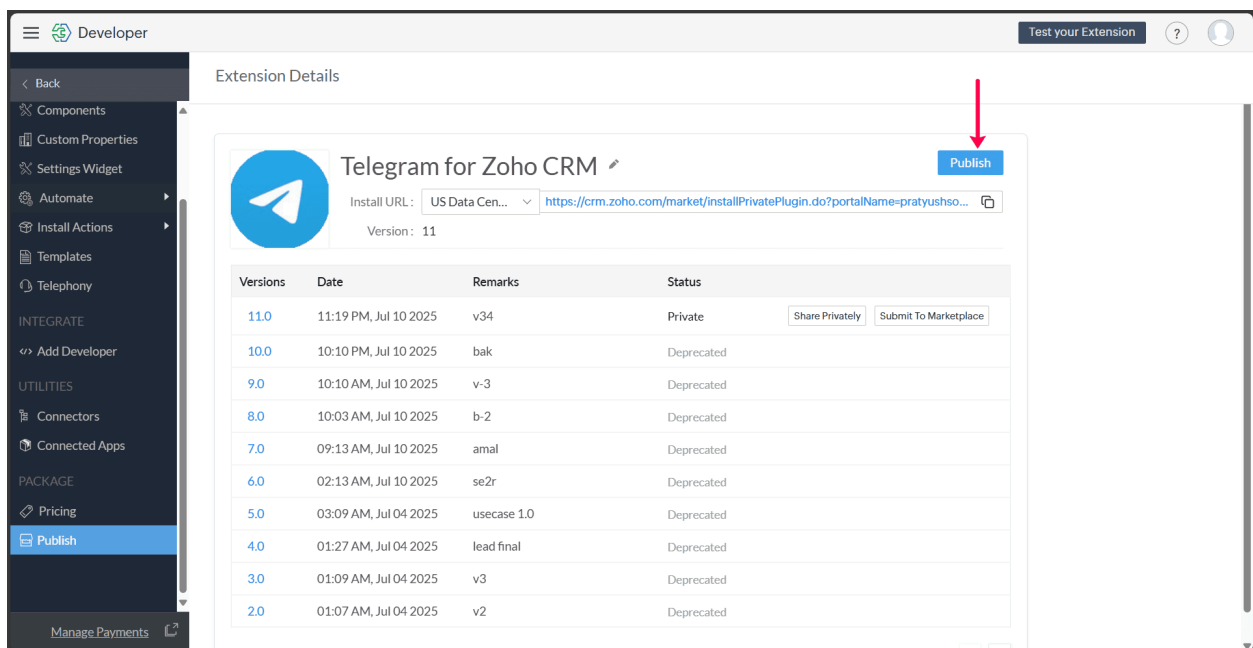
This extension requires a one-time setup involving token generation, database linking, and hosting the bot backend on a platform like Render.

The step-by-step setup and usage instructions are provided below.

SETUP INSTRUCTIONS :

This guide will help you set up and use the **Telegram for Zoho CRM** extension. By following the steps below, you will be able to connect your Zoho CRM account to a Telegram bot, allowing two-way communication for CRM data updates and bot commands.

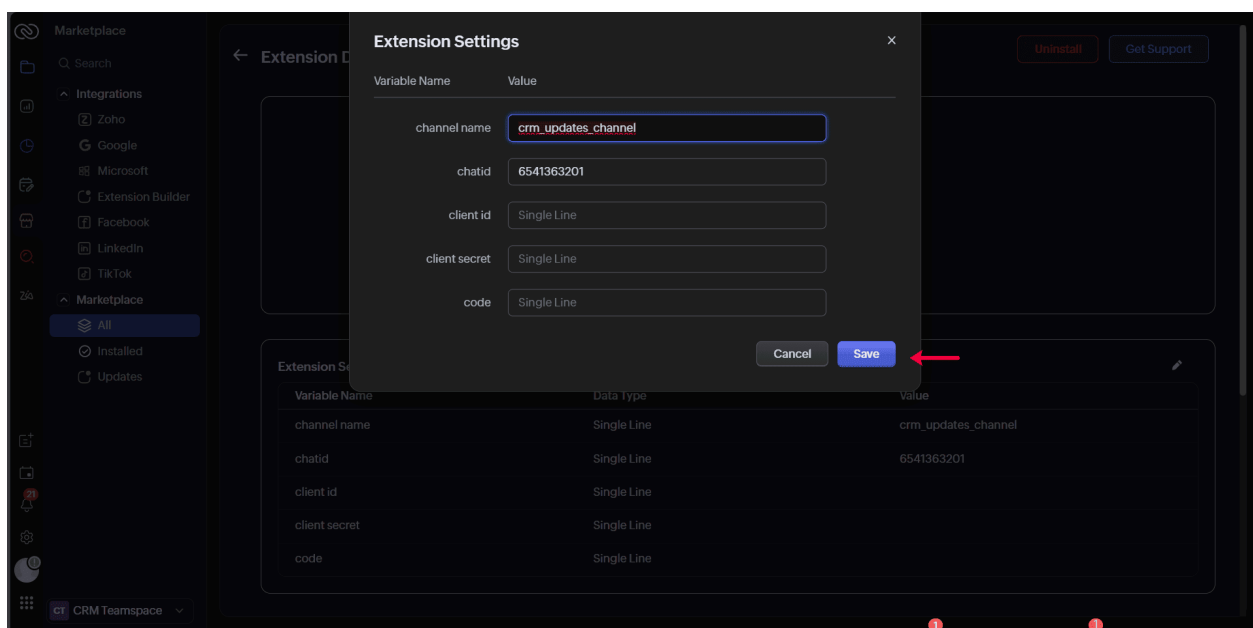
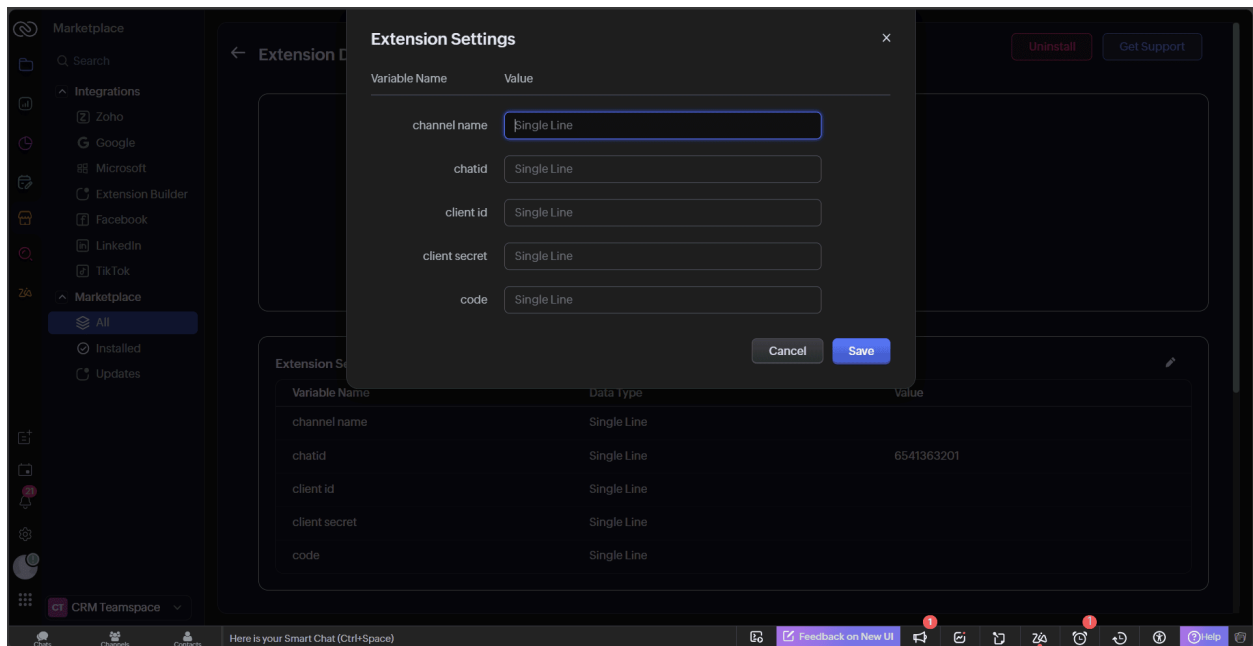
Step 1 : Copy the extension link and install it into your CRM.



The screenshot shows the Zoho Developer portal interface. On the left is a dark sidebar with navigation options: Components, Custom Properties, Settings Widget, Automate, Install Actions, Templates, Telephony, INTEGRATE, Add Developer, UTILITIES, Connectors, Connected Apps, PACKAGE, Pricing, Publish (highlighted), and Manage Payments. The main area is titled 'Extension Details' and shows the 'Telegram for Zoho CRM' extension. It includes a Telegram logo, the extension name, an 'Install URL' dropdown set to 'US Data Cen...', and a long URL starting with 'https://crm.zoho.com/market/installPrivatePlugin.do?portalName=pratyusho...'. Below this is a 'Version: 11' label. A blue 'Publish' button is located in the top right corner of the extension details card, with a red arrow pointing to it. Below the publish button is a table of previous versions.

Versions	Date	Remarks	Status
11.0	11:19 PM, Jul 10 2025	v34	Private
10.0	10:10 PM, Jul 10 2025	bak	Deprecated
9.0	10:10 AM, Jul 10 2025	v-3	Deprecated
8.0	10:03 AM, Jul 10 2025	b-2	Deprecated
7.0	09:13 AM, Jul 10 2025	amal	Deprecated
6.0	02:13 AM, Jul 10 2025	se2r	Deprecated
5.0	03:09 AM, Jul 04 2025	usecase 1.0	Deprecated
4.0	01:27 AM, Jul 04 2025	lead final	Deprecated
3.0	01:09 AM, Jul 04 2025	v3	Deprecated
2.0	01:07 AM, Jul 04 2025	v2	Deprecated

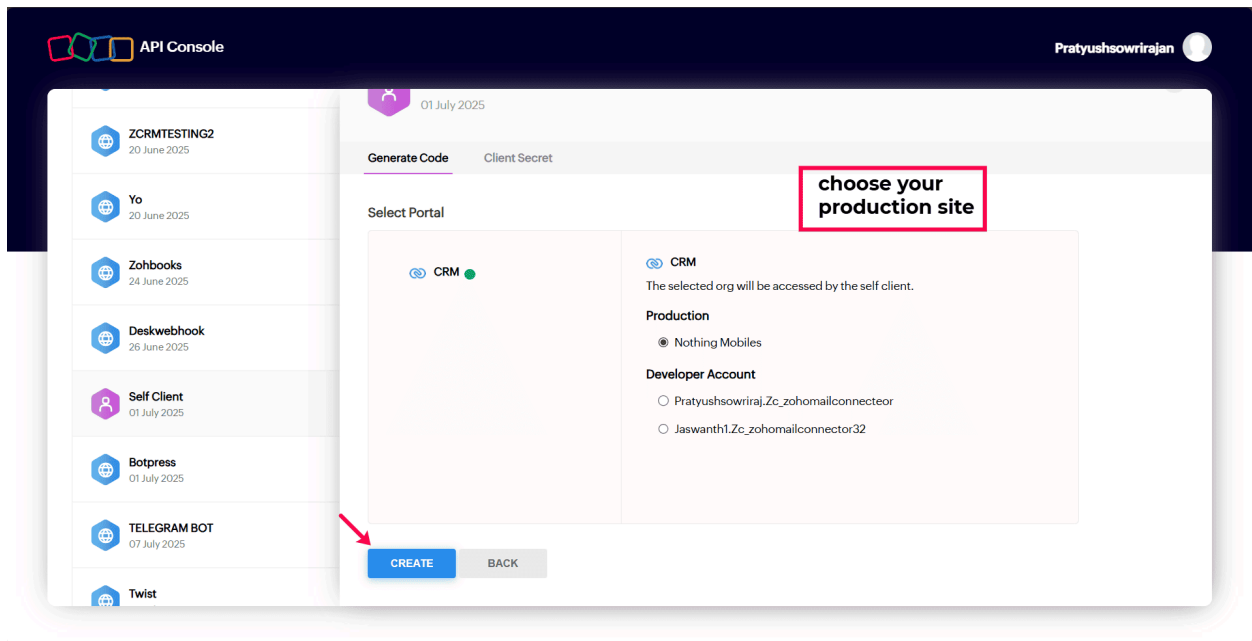
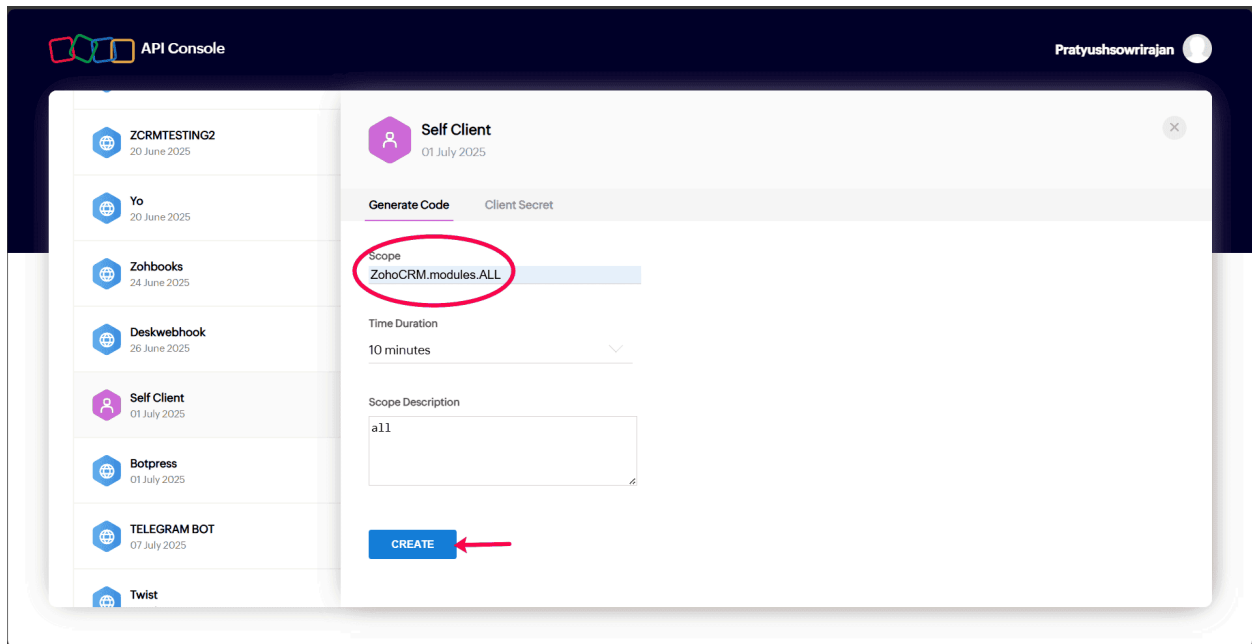
Step 2 : Once the extension is installed, it will prompt you to enter certain **CRM variables**. These are necessary for connecting Zoho CRM to Telegram. Only **channel name** and **chat id** are mandatory at this stage. The rest of the variables are not required for initial setup.

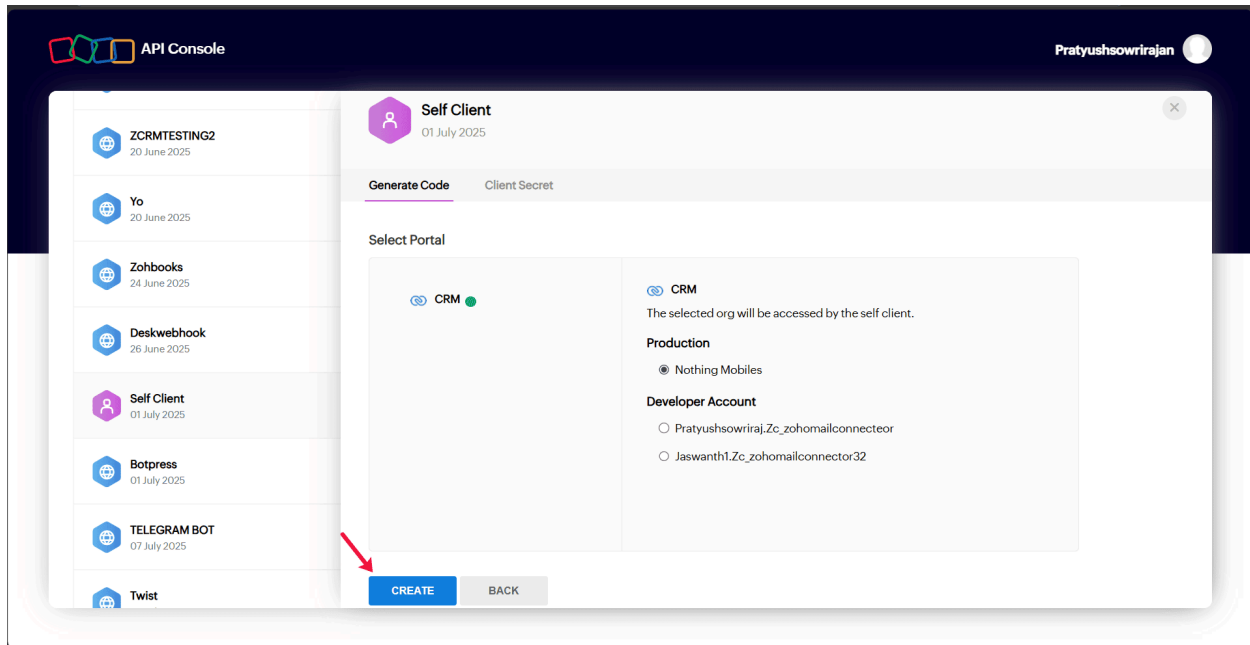


Step 3 : Go to Zoho API Console and choose **Self Client** from the options.

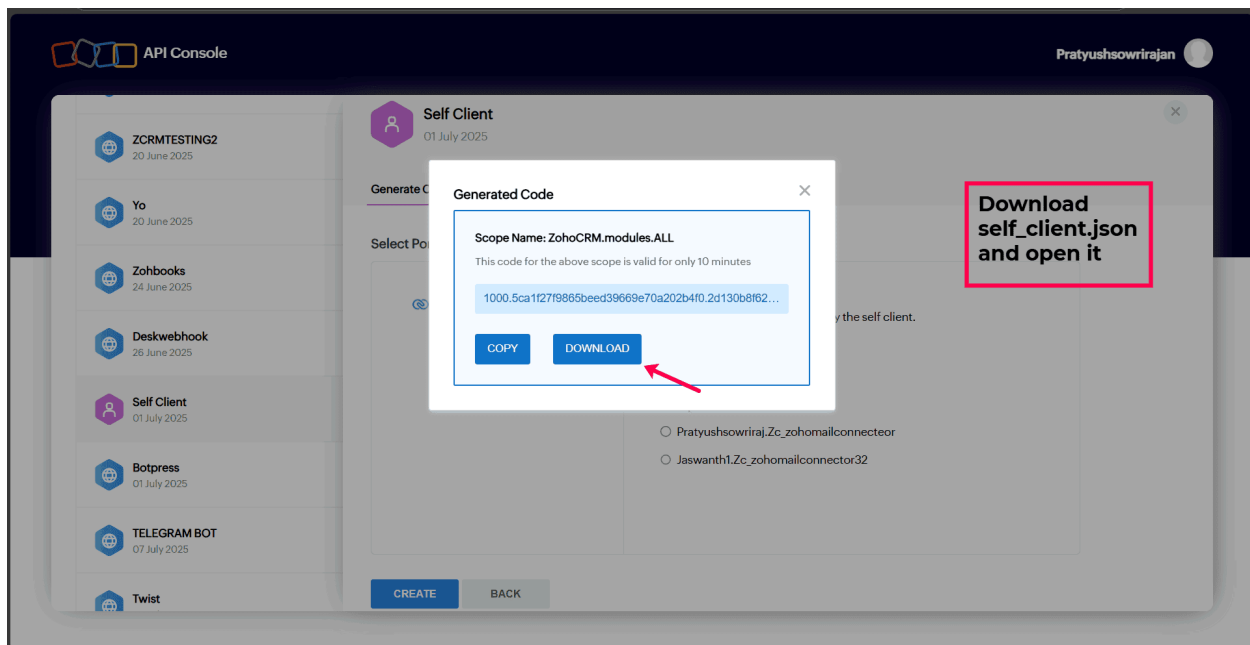
Under **Scope**, enter : ZohoCRM.modules.ALL

Then , Make sure to select your **Production Environment** that matches your CRM region before proceeding.

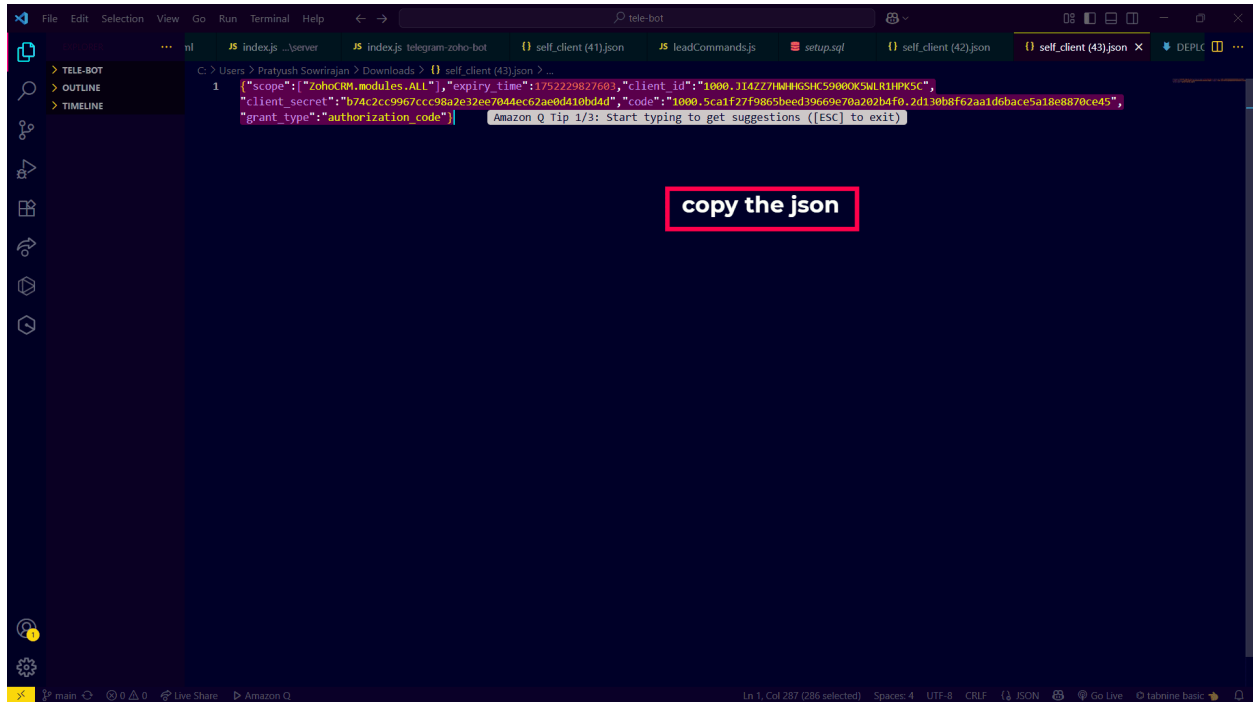




Step 4 : Click **Create**, and once the self client is created, download the self_client.json file.



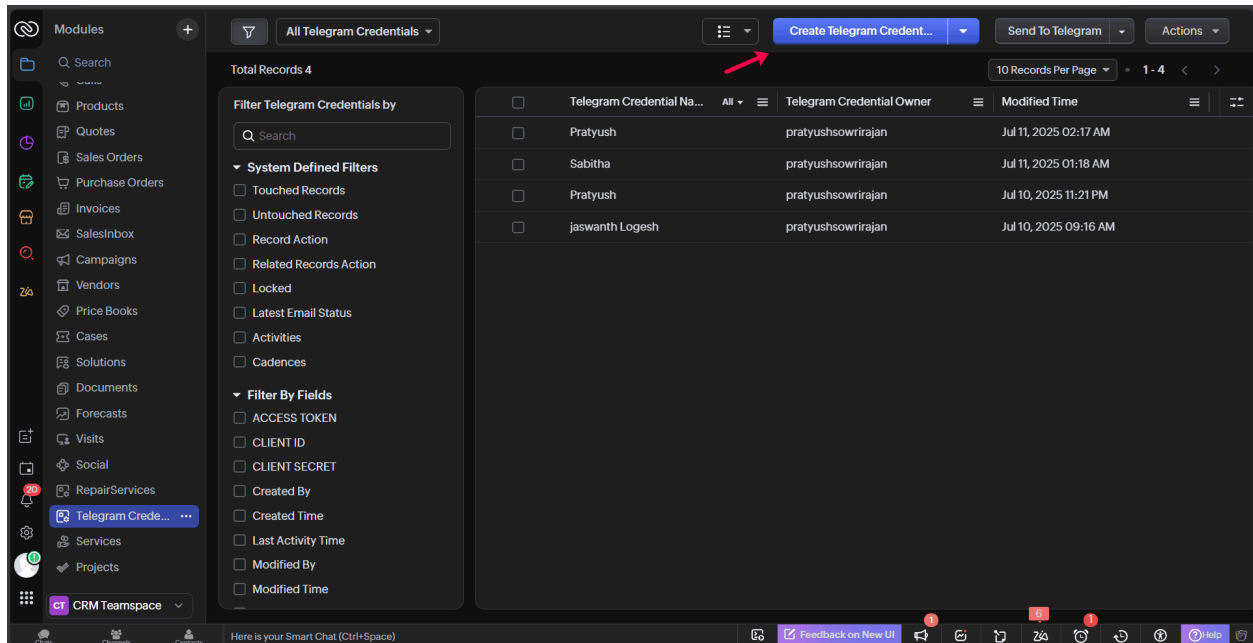
Step 5 : Copy the downloaded **JSON file** contents into your internal environment setup or wherever instructed by your team.



```
1 { "scope": ["ZohoCRM.modules.ALL"], "expiry_time": 1752229827603, "client_id": "1000_3142278d4f65HC59080K5MLR1H9K5C",  
  "client_secret": "b74c2cc9967ccc98a2e32ee7044ec62ae0d410bd4d", "code": "1000_5ca1f27f9865beed39669e70a202b4f0_2d130b8f62aa1d6bace5a18e8870ce45",  
  "grant_type": "authorization_code" }
```

copy the json

Step 6 : Next, create **Telegram credentials** within CRM.



The screenshot shows the Zoho CRM interface with the 'Telegram Credentials' module selected. The 'Create Telegram Credential...' button is highlighted with a red arrow. The table below lists the existing credentials.

Telegram Credential Na...	Telegram Credential Owner	Modified Time
Pratyush	pratyushsowrirajan	Jul 11, 2025 02:17 AM
Sabitha	pratyushsowrirajan	Jul 11, 2025 01:18 AM
Pratyush	pratyushsowrirajan	Jul 10, 2025 11:21 PM
jaswanth Logesh	pratyushsowrirajan	Jul 10, 2025 09:16 AM

The **Name** and the **JSON credentials** are the only mandatory fields to be filled here.

This screenshot shows the 'Create Telegram Credential' form in a CRM system. The form is titled 'Create Telegram Credential' and has buttons for 'Cancel', 'Save and New', and 'Save'. It is divided into two main sections: 'Telegram Credential Image' and 'Telegram Credential Information'. The 'Telegram Credential Information' section contains several fields: 'Telegram Credential Name' (filled with 'Testing'), 'Telegram Credential Owner' (a dropdown menu showing 'pratyushsowrirajan'), 'CLIENT ID', 'CLIENT SECRET', 'ACCESS TOKEN', 'REFRESH TOKEN', and 'TELEGRAM CHAT ID'. The 'Self Client Json' field is currently empty. A red box with the text 'Paste the json' and an arrow points to this field. The left sidebar shows various modules like Products, Quotes, Sales Orders, etc. The bottom status bar indicates 'Here is your Smart Chat (Ctrl+Space)' and includes a 'Feedback on New UI' button.

Modules

Search

Products

Quotes

Sales Orders

Purchase Orders

Invoices

SalesInbox

Campaigns

Vendors

Price Books

Cases

Solutions

Documents

Forecasts

Visits

Social

RepairServices

Telegram Crede...

Services

Projects

CRM Teamspace

Create Telegram Credential Edit Page Layout

Cancel Save and New Save

Telegram Credential Image

Telegram Credential Information

Telegram Credential Name Testing

Telegram Credential Owner pratyushsowrirajan

CLIENT ID

CLIENT SECRET

ACCESS TOKEN

REFRESH TOKEN

TELEGRAM CHAT ID

Self Client Json

Paste the json

Create Form Views Standard View Create a custom form page

Here is your Smart Chat (Ctrl+Space)

Feedback on New UI

This screenshot shows the same 'Create Telegram Credential' form, but now the 'Self Client Json' field is filled with a JSON string. The JSON string is:

```
{
  "client_id": "c99670cc98a2e32ee7044ec62ae0d410bd4d",
  "code": "1000.5ca1f2719865bead39669e70a202b4f0.2d130b8f62aa1d6bace5a18e8870ce45",
  "grant_type": "authorization_code"
}
```

 The left sidebar and other form elements are identical to the previous screenshot.

Modules

Search

Products

Quotes

Sales Orders

Purchase Orders

Invoices

SalesInbox

Campaigns

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Price Books

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Solutions

Documents

Forecasts

Visits

Social

RepairServices

Telegram Crede...

Services

Projects

CRM Teamspace

Create Telegram Credential Edit Page Layout

Cancel Save and New Save

Telegram Credential Image

Telegram Credential Information

Telegram Credential Name Testing

Telegram Credential Owner pratyushsowrirajan

CLIENT ID

CLIENT SECRET

ACCESS TOKEN

REFRESH TOKEN

TELEGRAM CHAT ID

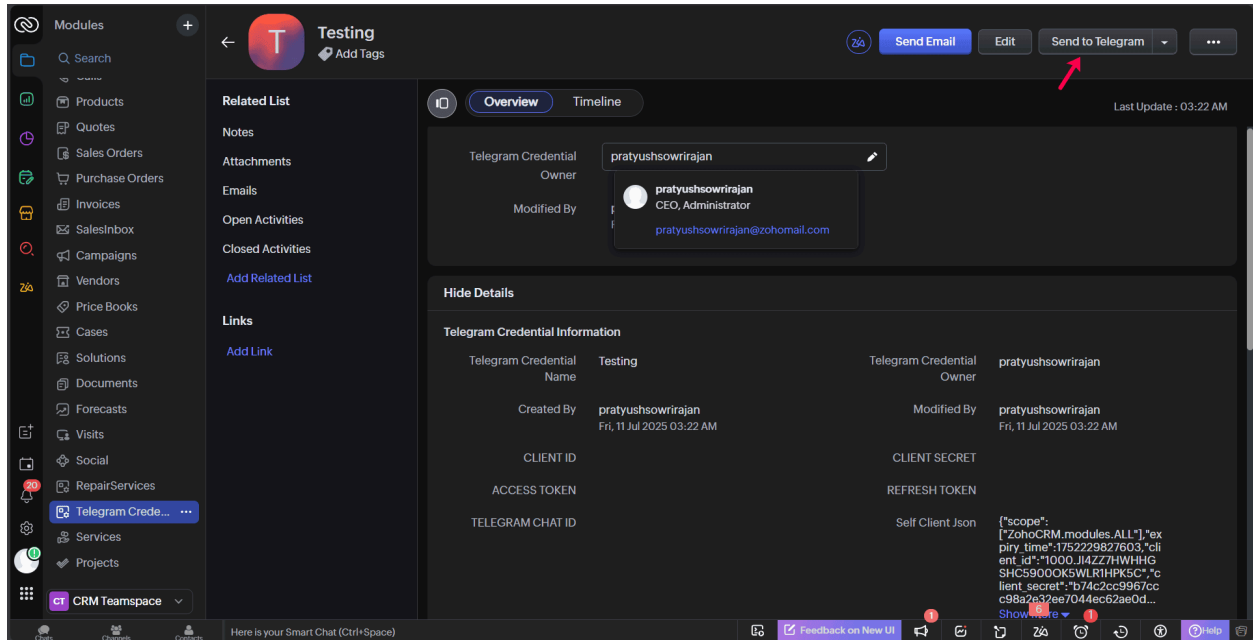
Self Client Json

Create Form Views Standard View Create a custom form page

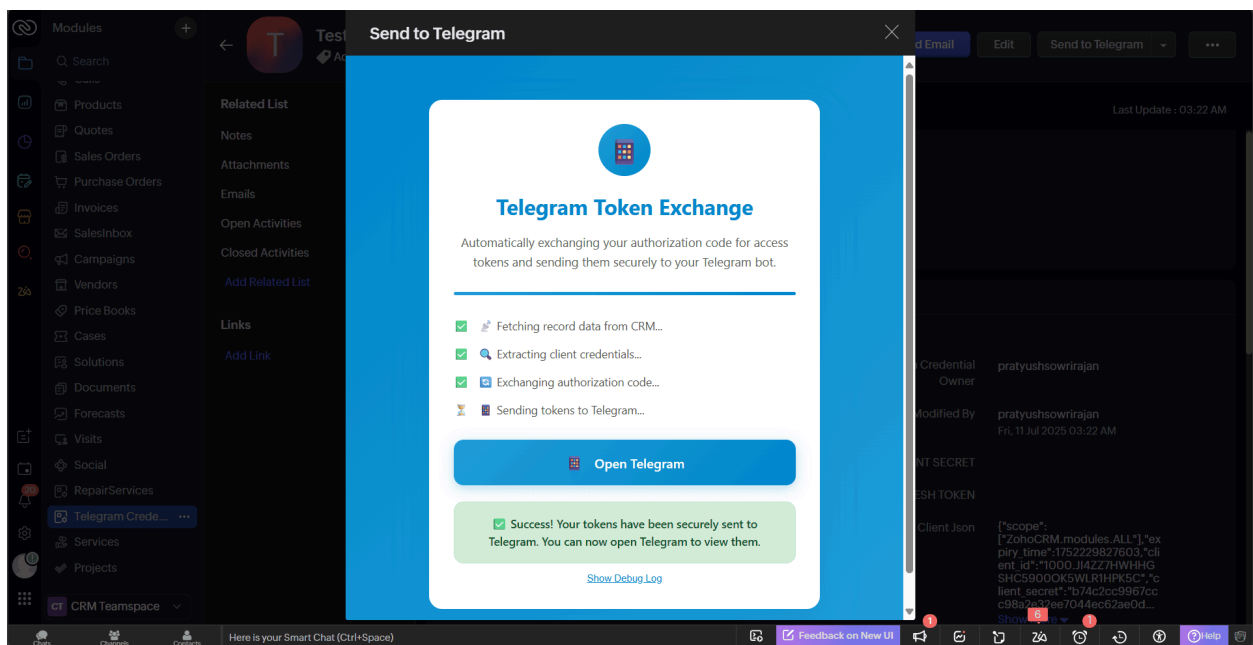
Here is your Smart Chat (Ctrl+Space)

Feedback on New UI

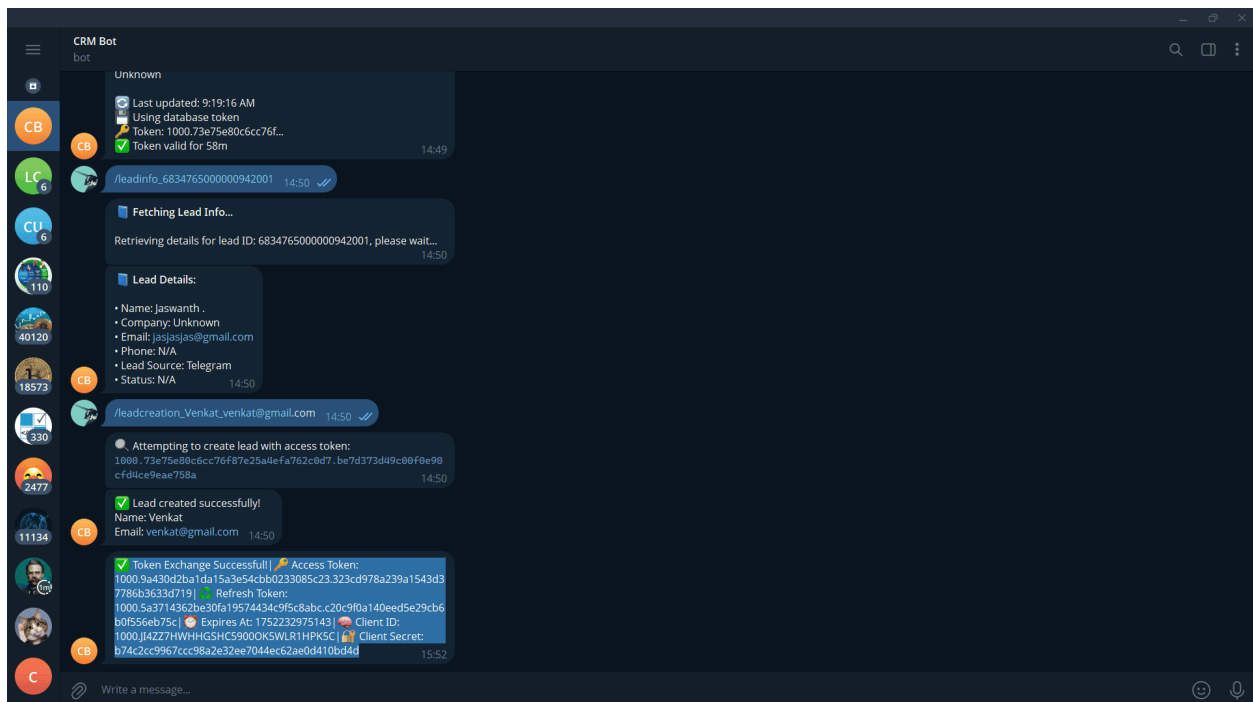
Step 7 : Click the custom button **"Send to Telegram"** to initiate the token exchange process.



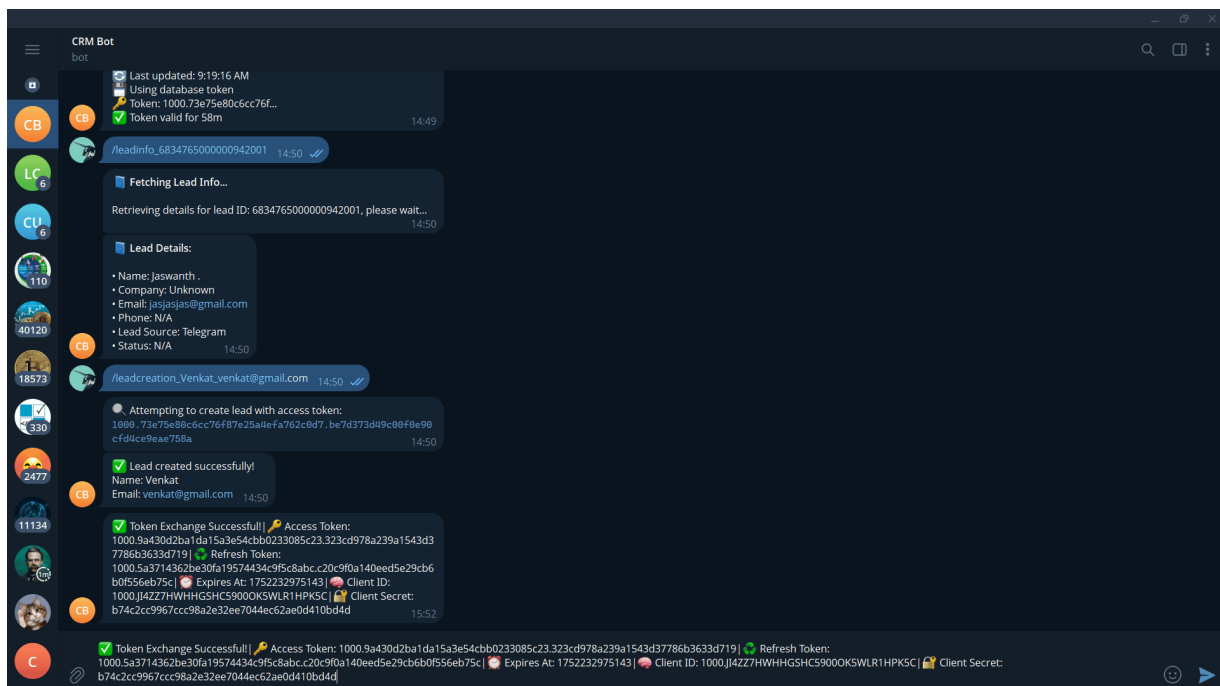
You'll see a widget showing the token exchange being processed. At this point, credentials are being prepared to be sent to your Telegram bot.



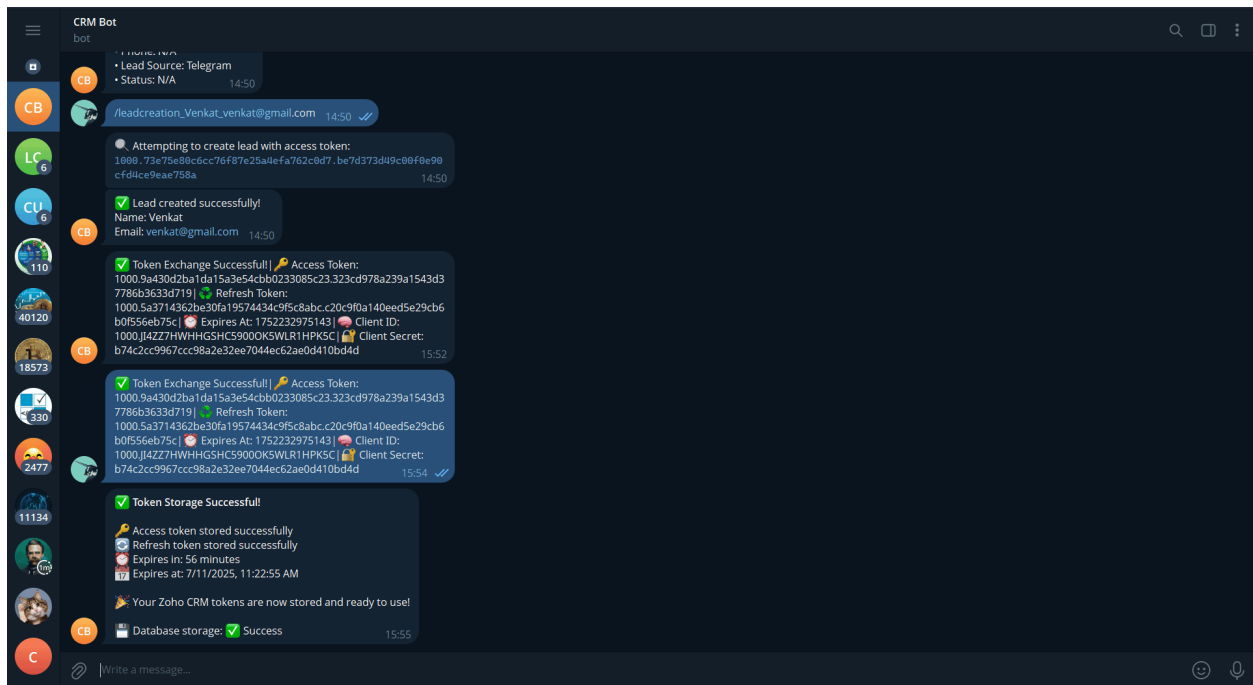
Check Telegram — your bot will receive a message with all required token details from CRM.



Step 8 : Copy the full message sent by the bot and paste it as a reply in the same bot chat. This step is crucial for storing the tokens.



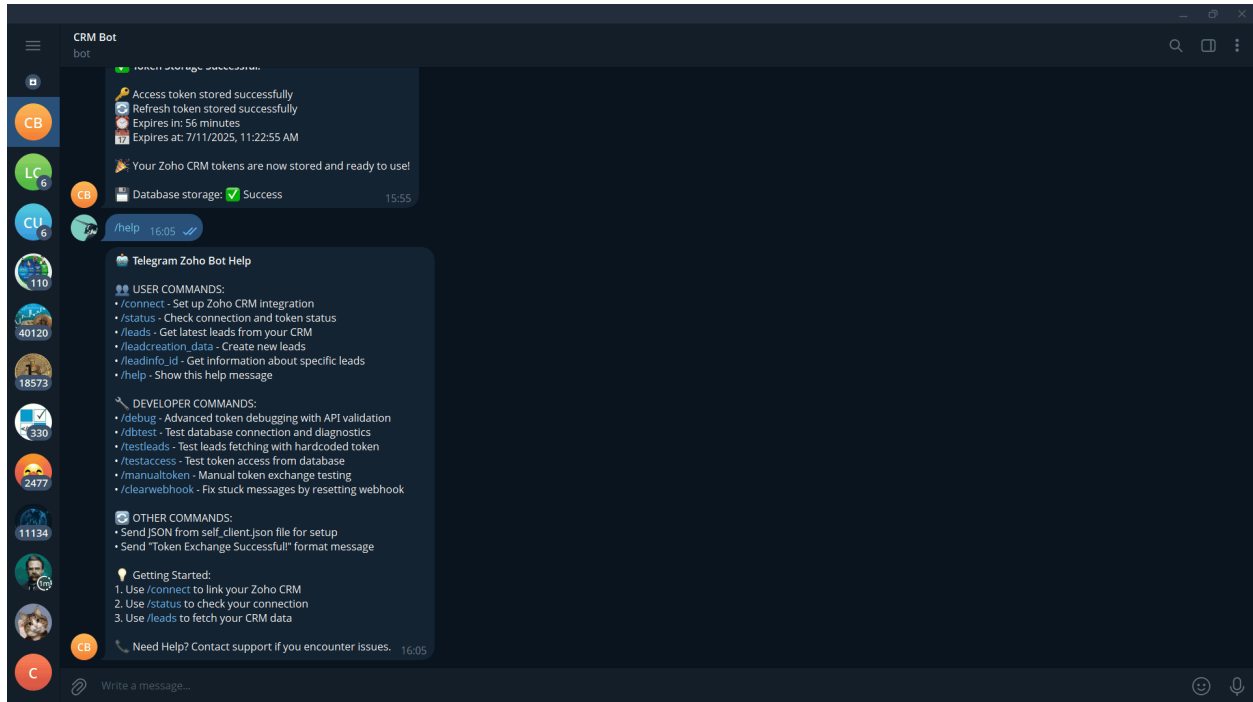
Once the bot receives and stores the credentials successfully in the database, a confirmation message will be shown.



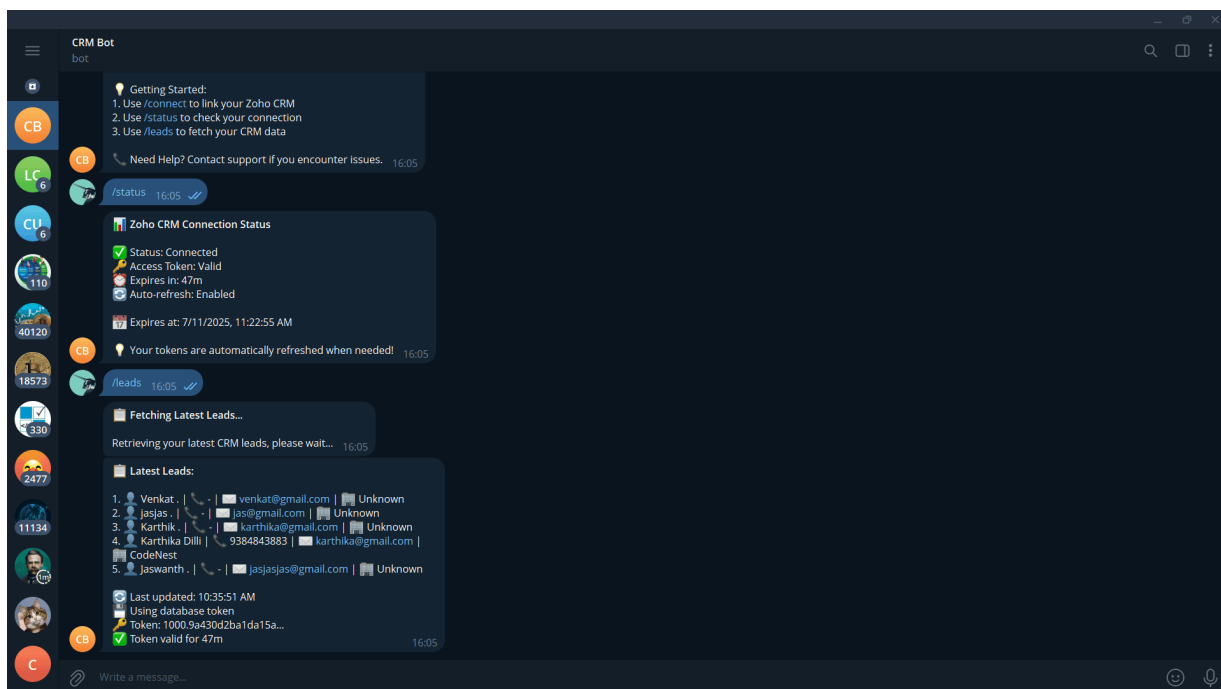
Congratulations , You are now **fully connected** — your Zoho CRM and Telegram bot are ready to work together.

USING TELEGRAM COMMANDS :

Type **/help** in the bot chat to see a full list of available commands.



Using **/leads** will fetch the **latest 5 leads** from your CRM.



Create a new lead inside your CRM as you normally would and then Copy the **lead ID** from the newly created lead record.

The screenshot shows the Zoho CRM interface with the 'Leads' module selected. The 'Create Lead' button is highlighted with a red arrow. The table below shows a list of leads.

	Lead Name	Email	Phone	Lead Source	
<input type="checkbox"/>	Testing .	testing@gmail.com		Telegram	praty
<input type="checkbox"/>	Venkat .	venkat@gmail.com		Telegram	praty
<input type="checkbox"/>	jasjas .	jas@gmail.com		Telegram	praty
<input type="checkbox"/>	Karthika Dilli	karthika@gmail.com	(938) 484-3883		praty
<input type="checkbox"/>	Jaswanth .	jasjas@gmail.com		Telegram	praty
<input type="checkbox"/>	Pratyush .	pratyushsowrirajan@gmail.com		Telegram	praty
<input type="checkbox"/>	Karthik .	karthika@gmail.com		Telegram	praty
<input type="checkbox"/>	Karthika Kaushal				praty
<input type="checkbox"/>	Chun Sowirajan				praty
<input type="checkbox"/>	Pratyush Binod	binarybinod@gmail.com			praty

The screenshot shows the Zoho CRM interface with the 'Leads' module selected. The lead details for 'Testing . - Unknown' are displayed. The lead ID is highlighted in the browser address bar with a red arrow.

Lead ID: 6834765000000967001

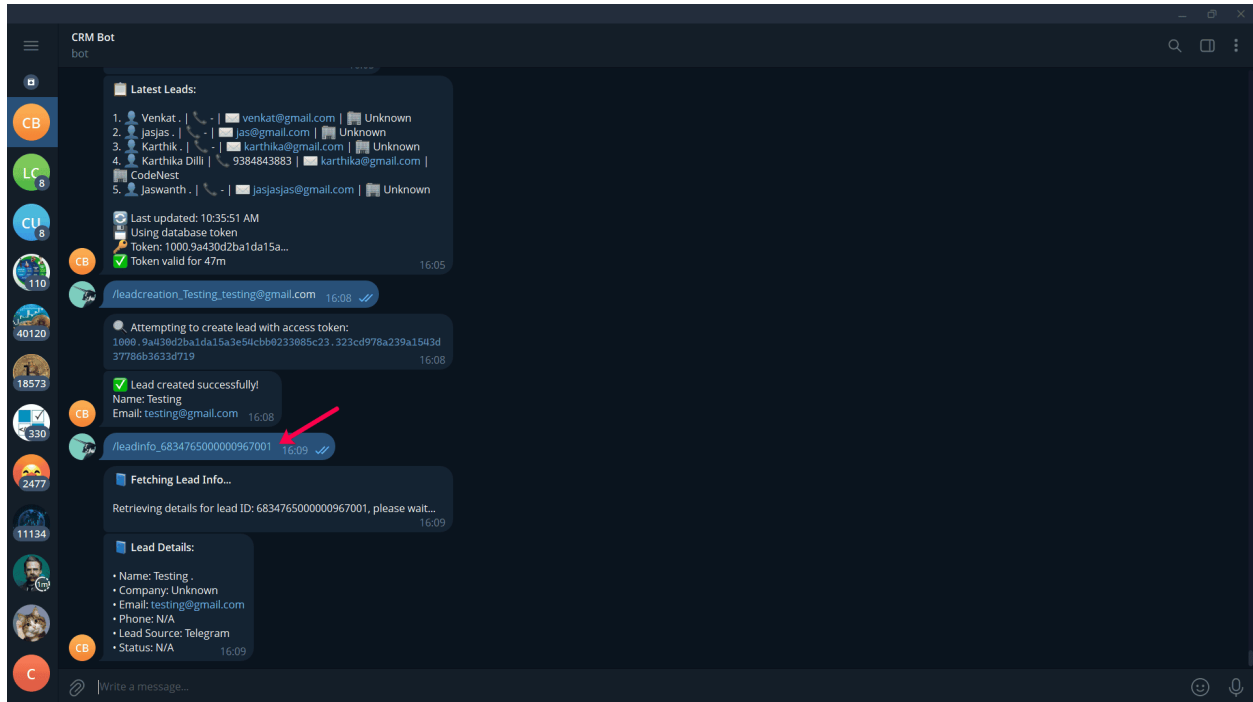
Lead Information:

Field	Value
Lead Owner	pratyushsowrirajan
Email	testing@gmail.com
Phone	—
Mobile	—
Lead Status	—

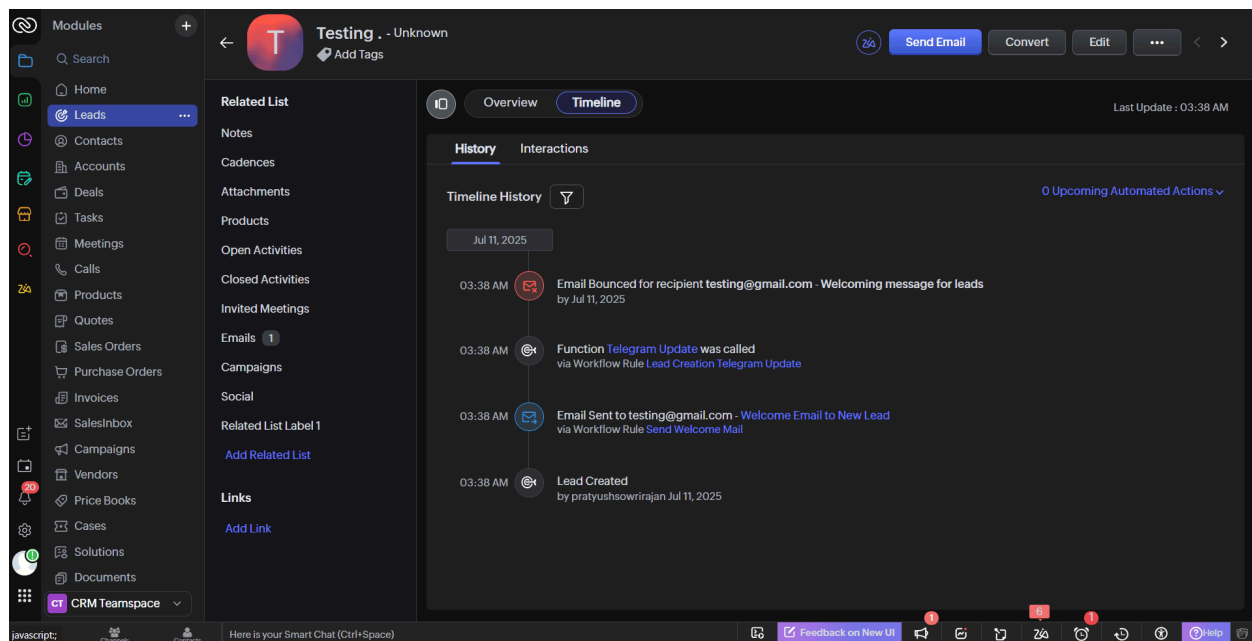
Lead Information (continued):

Field	Value
Company	Unknown
Lead Name	Testing .
Email	testing@gmail.com
Fax	—
Website	—
Lead Source	Telegram
Industry	—

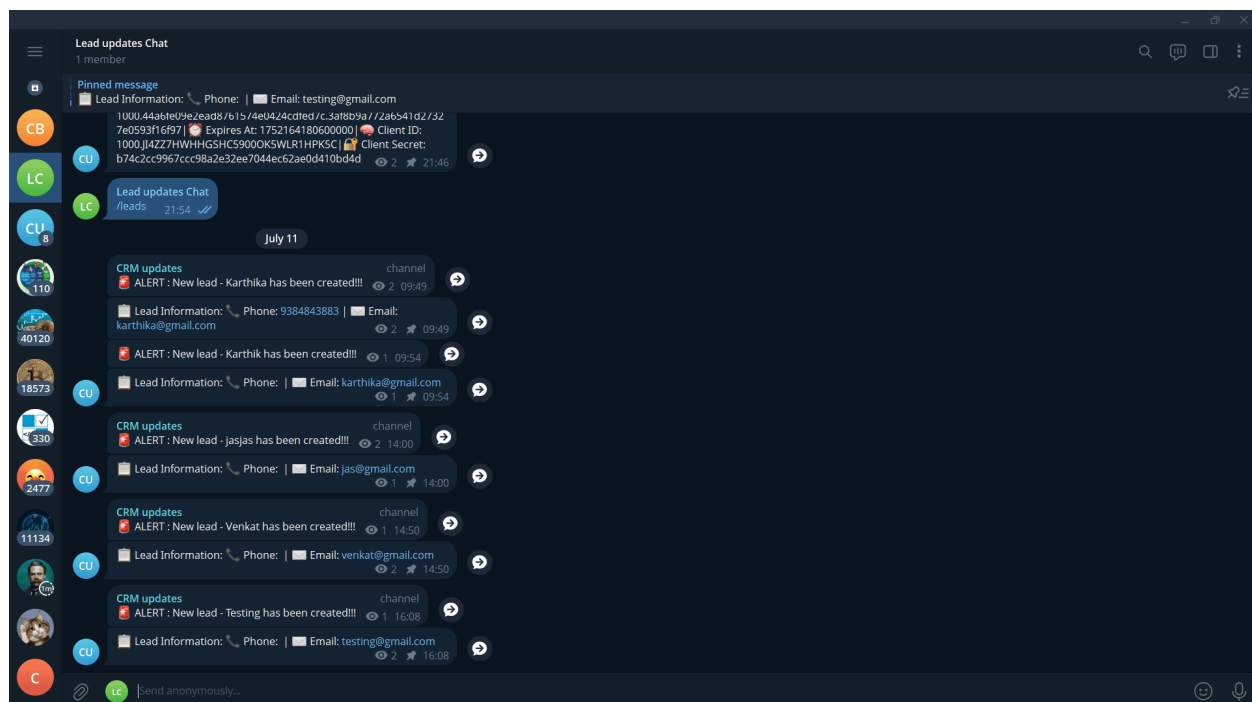
Use the command `/leadinfo_<lead_id>` to retrieve detailed information about that lead in Telegram.



Your CRM will automatically trigger a function (set through workflow) when the lead is created or edited.




A formatted alert message will be sent to your **Telegram channel**, notifying your team about the new lead.




Need Help or Support?

If you face any issues during setup or while using the extension, feel free to reach out.

Support Contact:

 Email: pratyushsowrirajan@gmail.com

 **Phone:** +91-9384843883

Response will be given within 24–48 hours on working days.

Feedback and Suggestions

I am constantly working to improve this extension. If you have suggestions for new features or want to report bugs:

- Drop us a message directly via email
- Or ping me in Whatsapp

Your input helps me build a better experience!

**Thank You – Enjoy using the
extension**