

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.

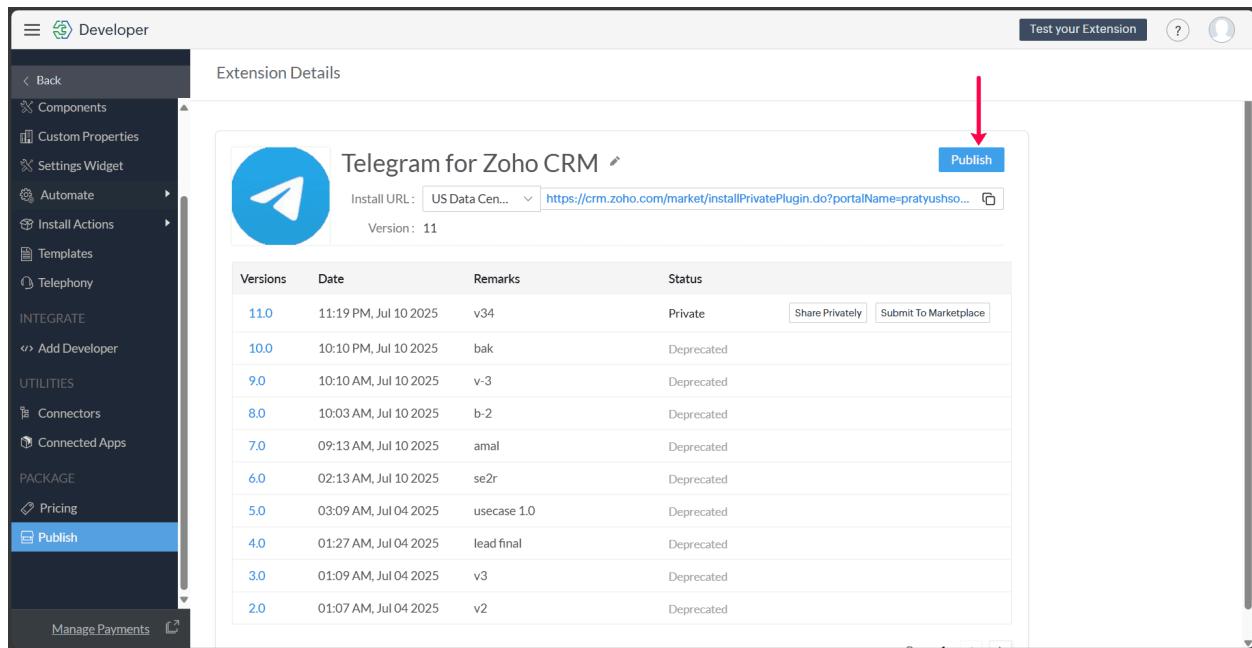
This extension requires a one-time setup involving token generation, database linking, and hosting the bot backend on a platform like Render.

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.

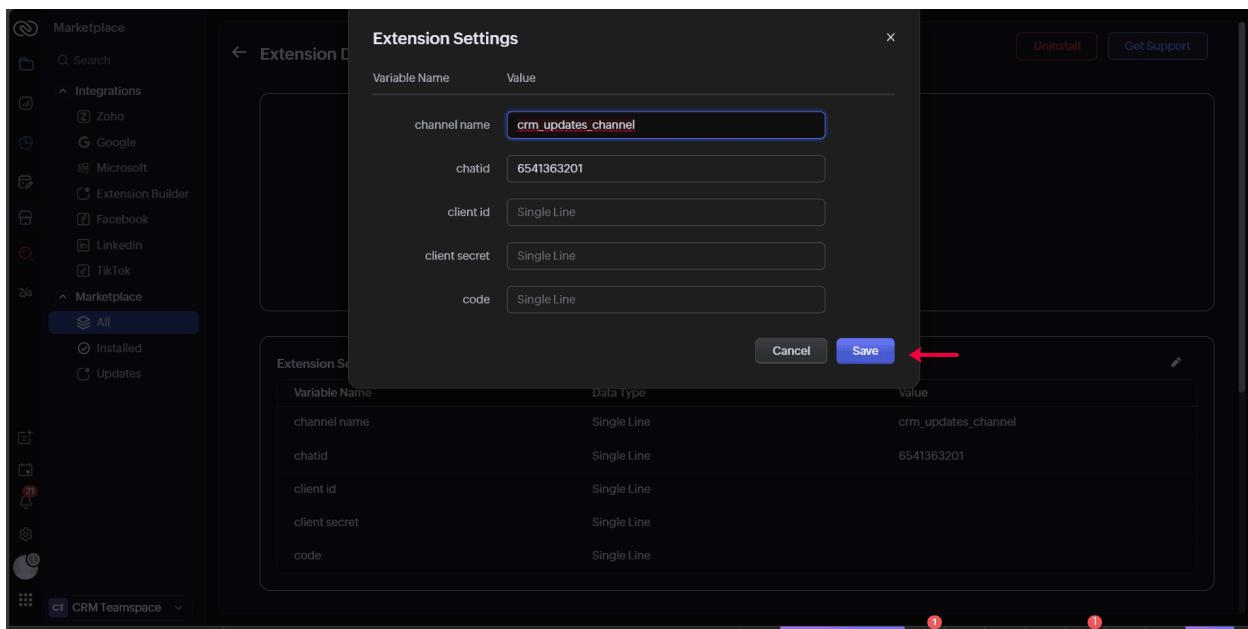
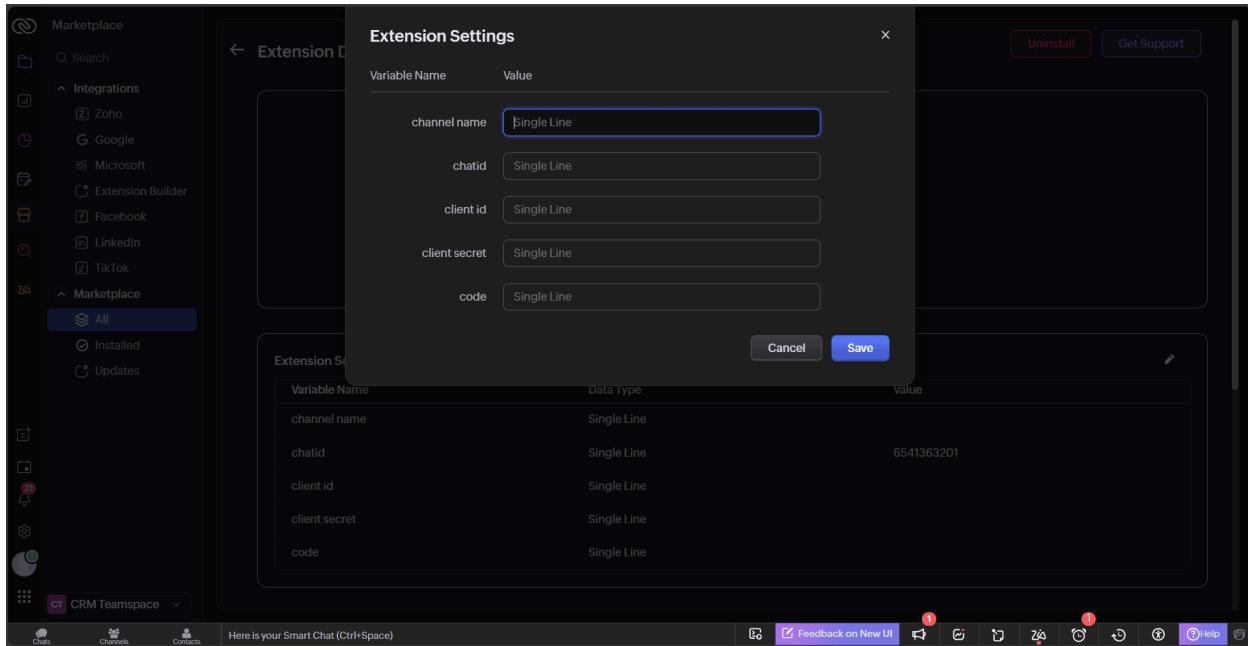
Step 1 : Copy the extension link and install it into your CRM.



The screenshot shows the Zoho Developer portal interface. On the left, there's a sidebar with various developer tools like Components, Custom Properties, Settings Widget, Automate, Install Actions, Templates, Telephony, Integrate, Utilities, Connectors, Connected Apps, and Pricing. The 'Publish' option is highlighted with a blue background. The main area is titled 'Extension Details' and features a card for the 'Telegram for Zoho CRM' extension. It includes a blue Telegram logo, the extension name, an 'Install URL' field containing a long URL, and a 'Version: 11'. Below this is a table showing ten versions of the extension, each with a date, remarks, and status (e.g., Private, Deprecated). A prominent red arrow points to the 'Publish' button at the top right of the extension card.

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

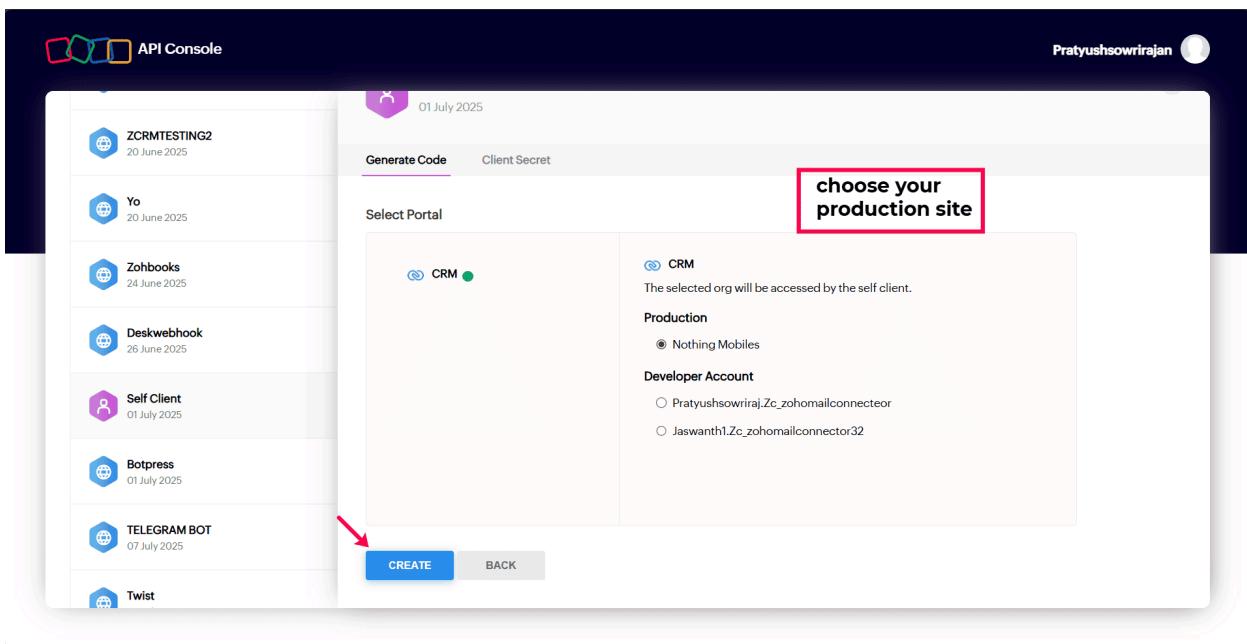
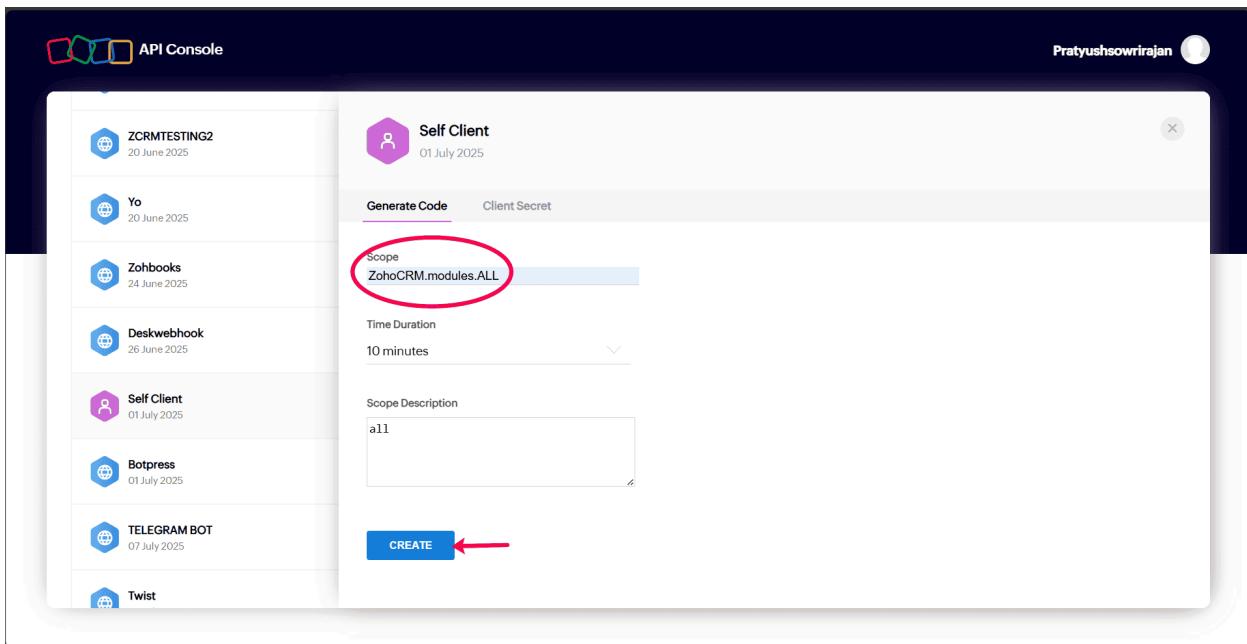
Step 2 : Once the extension is installed, it will prompt you to enter certain **CRM variables**. These are necessary for connecting Zoho CRM to Telegram. Only **channel name** and **chat id** are mandatory at this stage. The rest of the variables are not required for initial setup.

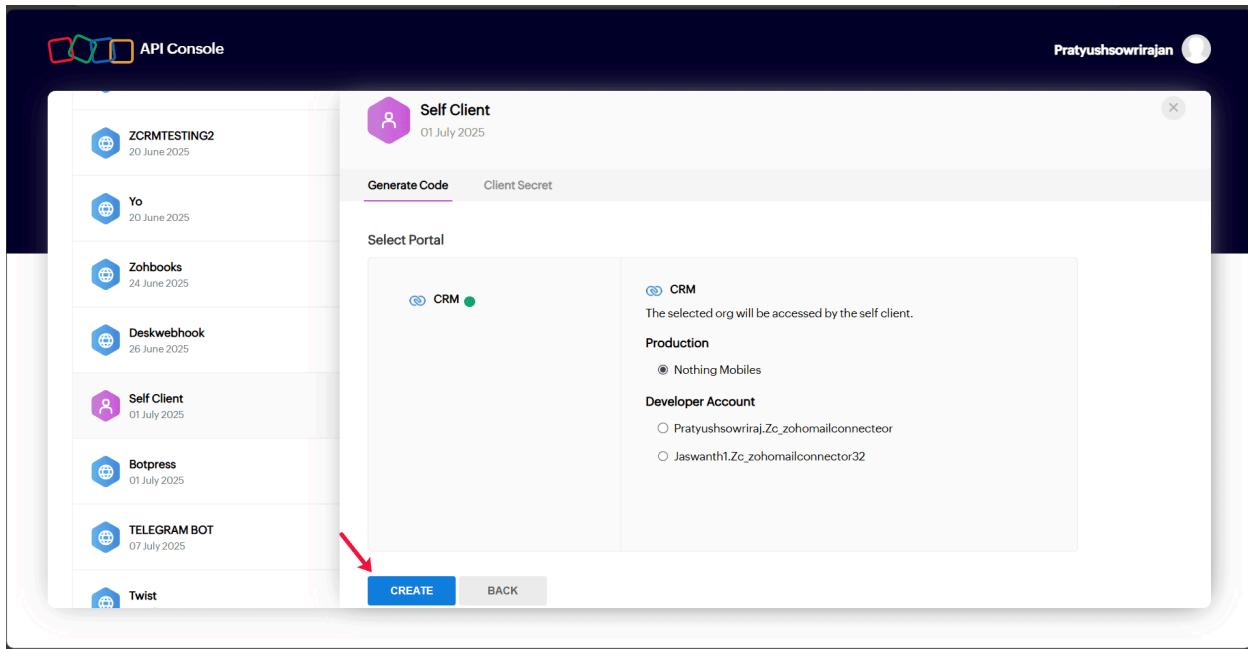


Step 3 : Go to Zoho API Console and choose **Self Client** from the options.

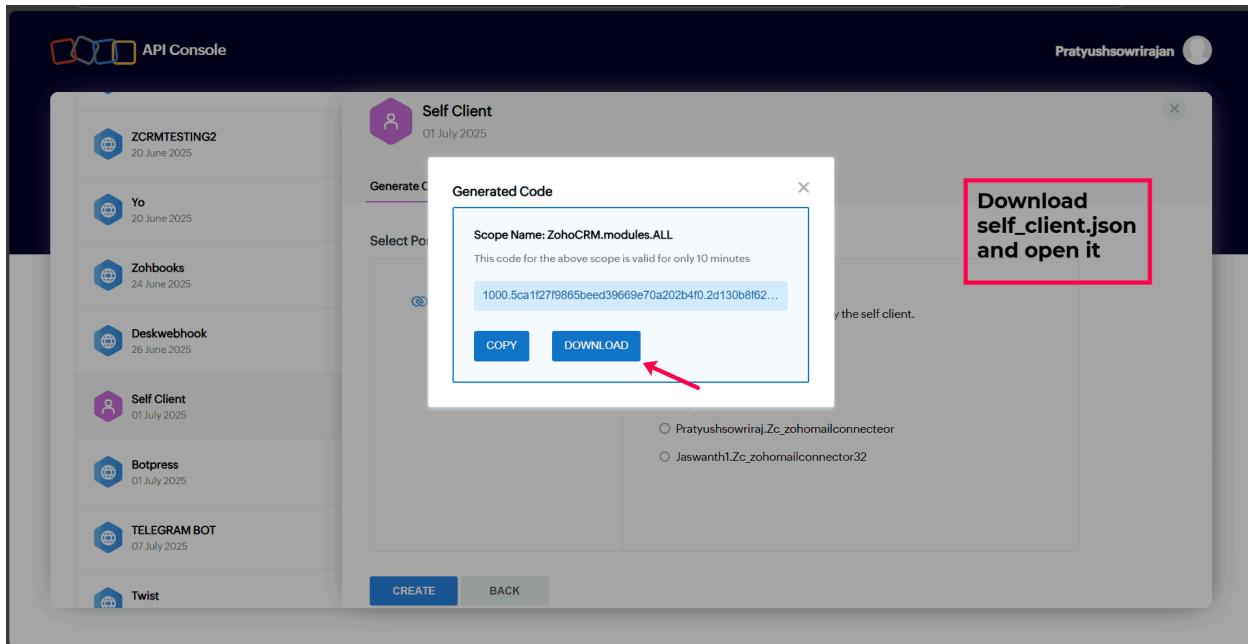
Under **Scope**, enter : ZohoCRM.modules.ALL

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

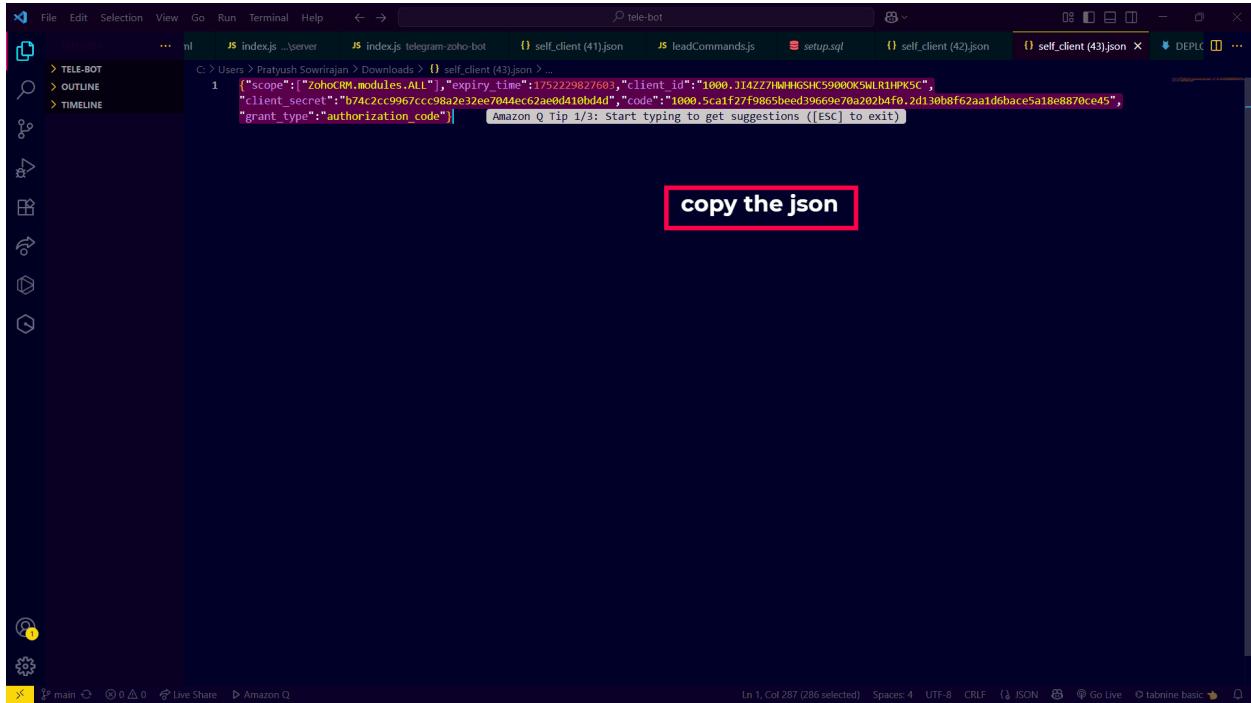




Step 4 : Click **Create**, and once the self client is created, download the **self_client.json** file.



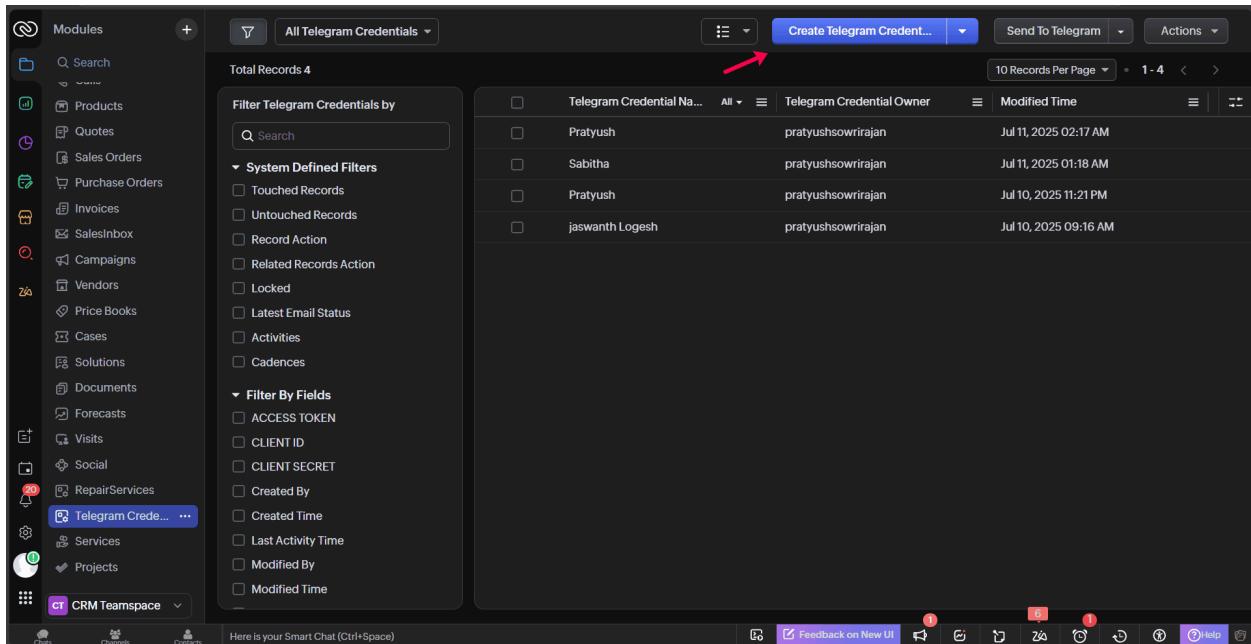
Step 5 : Copy the downloaded JSON file contents into your internal environment setup or wherever instructed by your team.



```
C: > Users > Pratyush Sowrirajan > Downloads > self_client (43).json > ...
1  ("scope":["ZohoCRM.modules.ALL"], "expiry_time":175229827603, "client_id":"1000_11427710000GSHC59000K5WLR1HPK5C",
  "client_secret":"b7ac2cc9967ccc98a2e32ee7044ec62ae0d410hd4d", "code":"1000_5ca1f27f9865beed39669e70a202b4f0_2d13b8ff62aa1d6bace5a18e8870ce45",
  "grant_type":"authorization_code")
```

copy the json

Step 6 : Next, create Telegram credentials within CRM.



The screenshot shows the Zoho CRM interface with the left sidebar expanded. The 'Modules' section is visible, with 'Telegram Cred...' highlighted. The main area displays a list of 'All Telegram Credentials' with 4 total records. The 'Actions' dropdown menu is open above the list. A red arrow points to the blue 'Create Telegram Credential...' button at the top right of the list area.

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

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

Screenshot of the "Create Telegram Credential" page. The "Self Client Json" field is highlighted with a red box and the text "Paste the json".

Telegram Credential Information

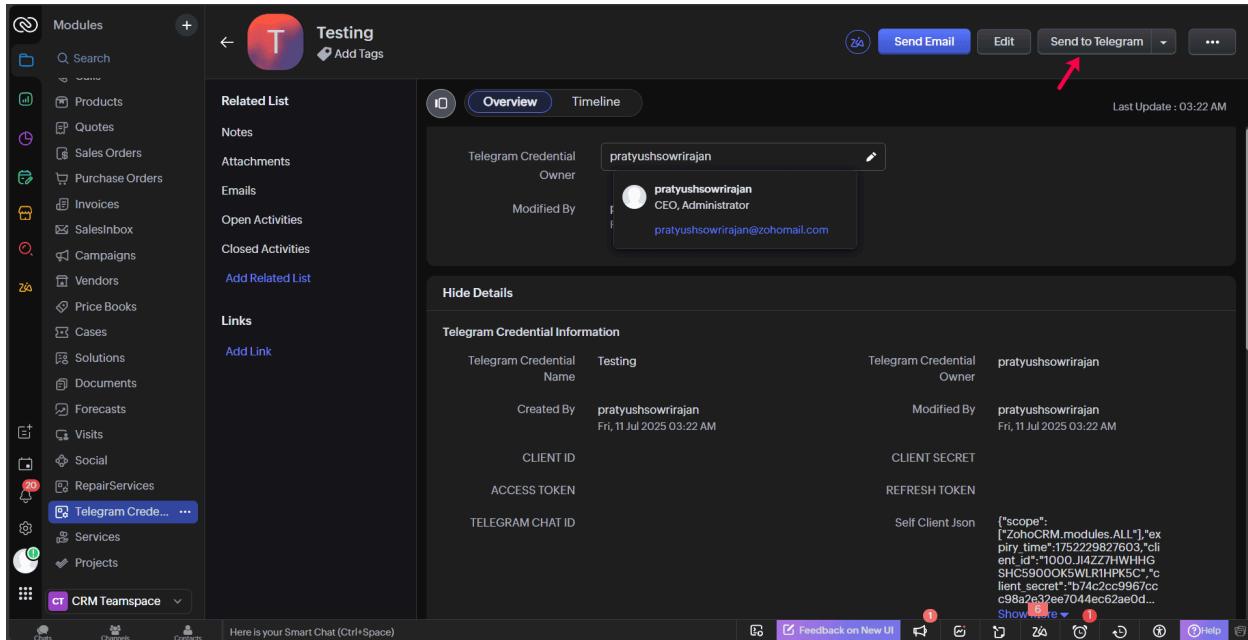
Telegram Credential Name	Testing	Telegram Credential Owner	pratyushsowrirajan
CLIENT ID		CLIENT SECRET	
ACCESS TOKEN		REFRESH TOKEN	
TELEGRAM CHAT ID		Self Client Json	(highlighted with a red box)

Paste the json

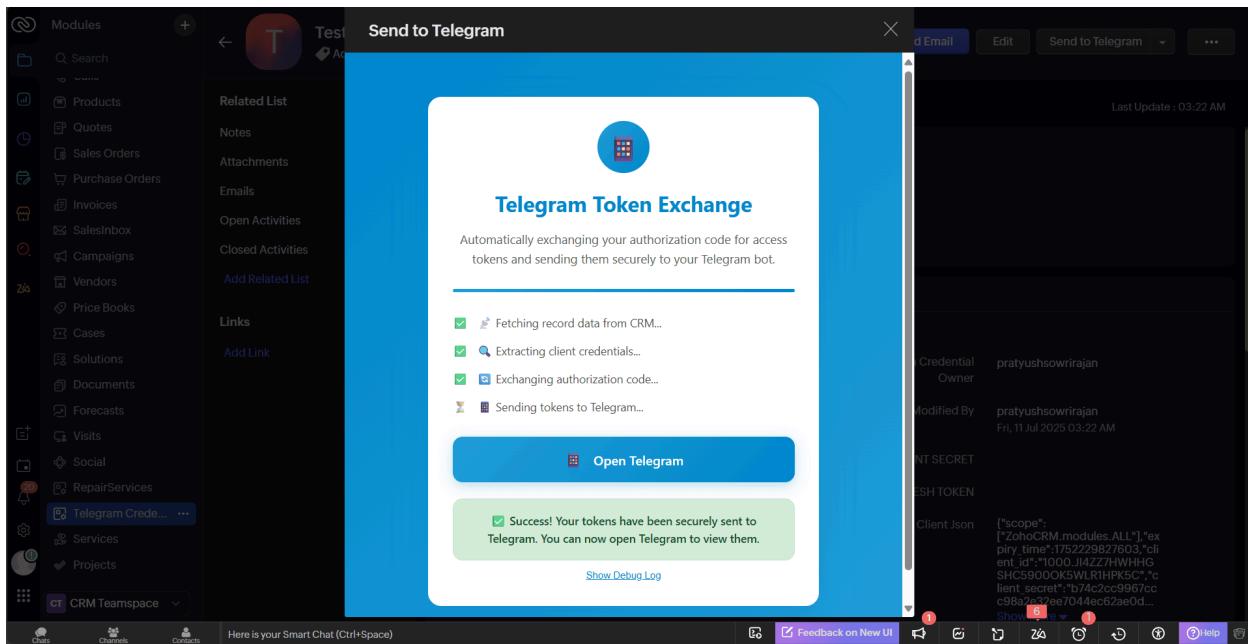
Screenshot of the "Create Telegram Credential" page. The "Self Client Json" field contains the following JSON code:

```
c9967ccc98a2e32ee7044ec62ae0d410bd4d",  
"code":1000.5ca1f27f9865beed39669e70a20  
2b4f0_2d13008f62aa1d6bace5a518e8870ce45",  
"grant_type": "authorization_code"
```

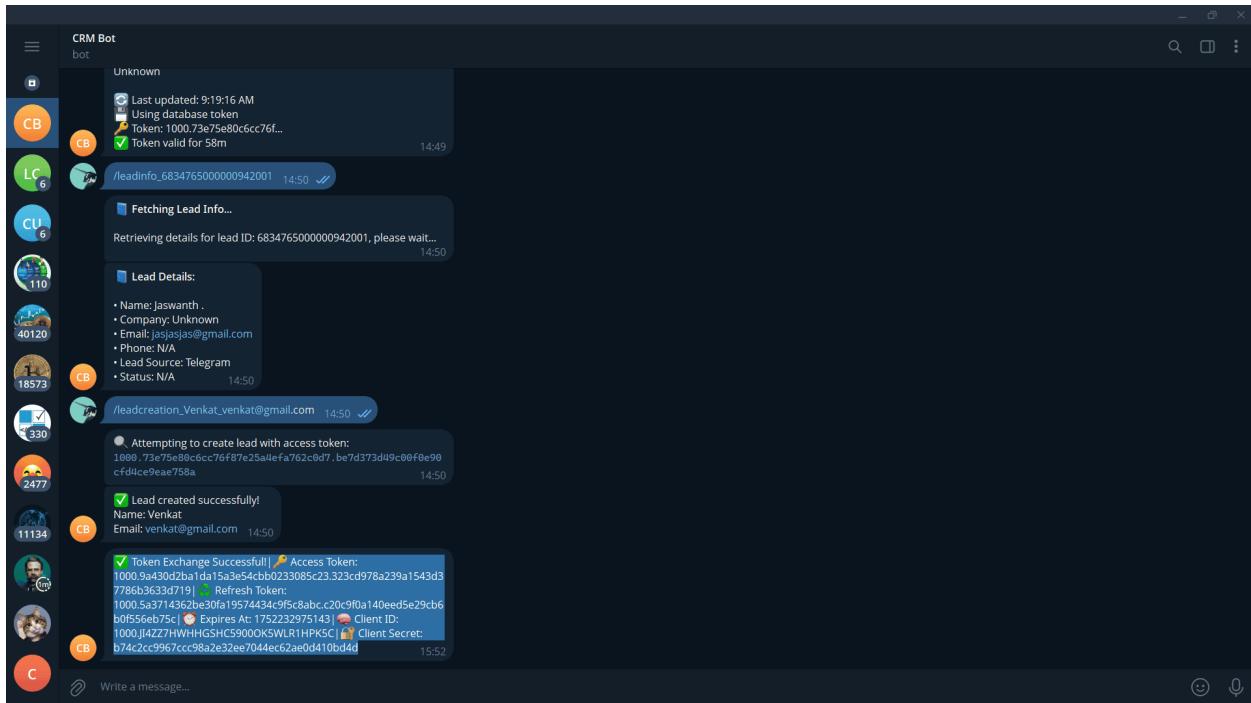
Step 7 : Click the custom button "Send to Telegram" to initiate the token exchange process.



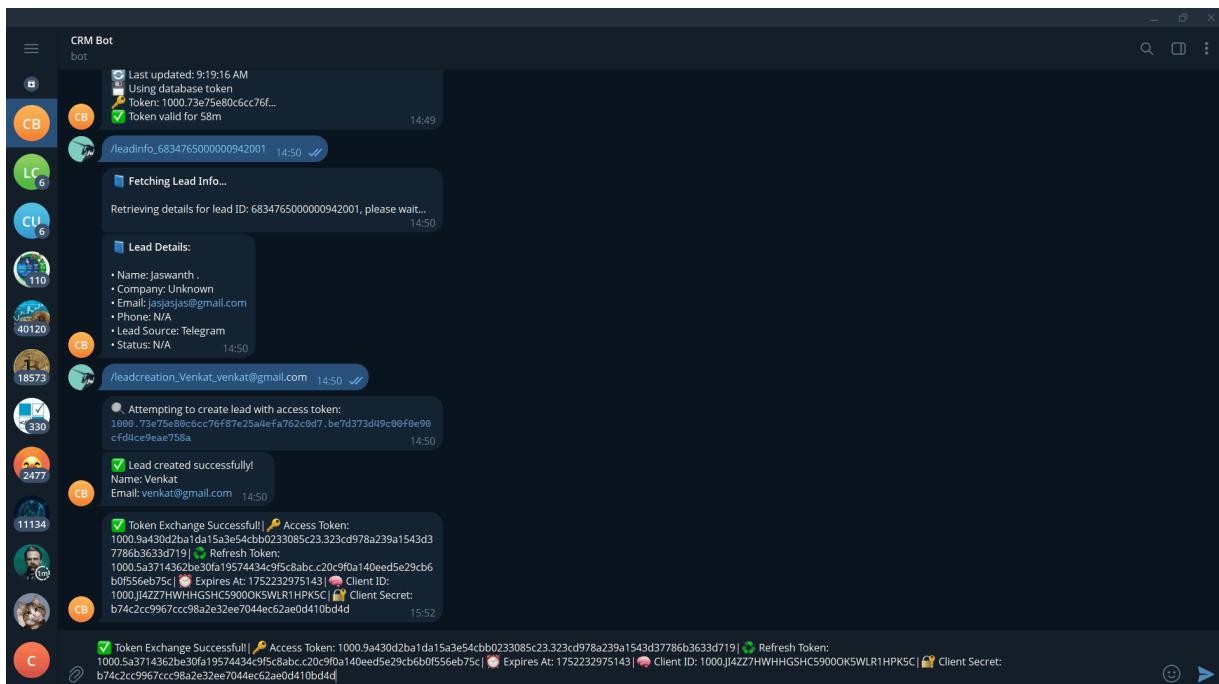
You'll see a widget showing the token exchange being processed. At this point, credentials are being prepared to be sent to your Telegram bot.



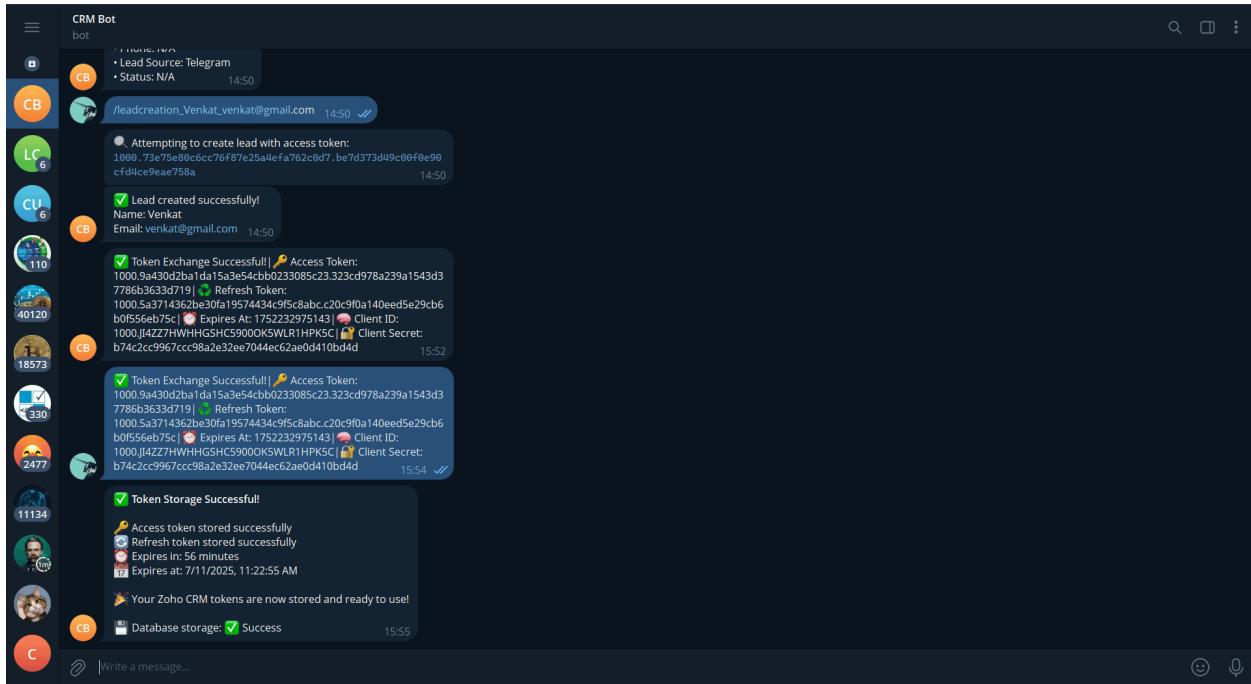
Check Telegram – your bot will receive a message with all required token details from CRM.



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.



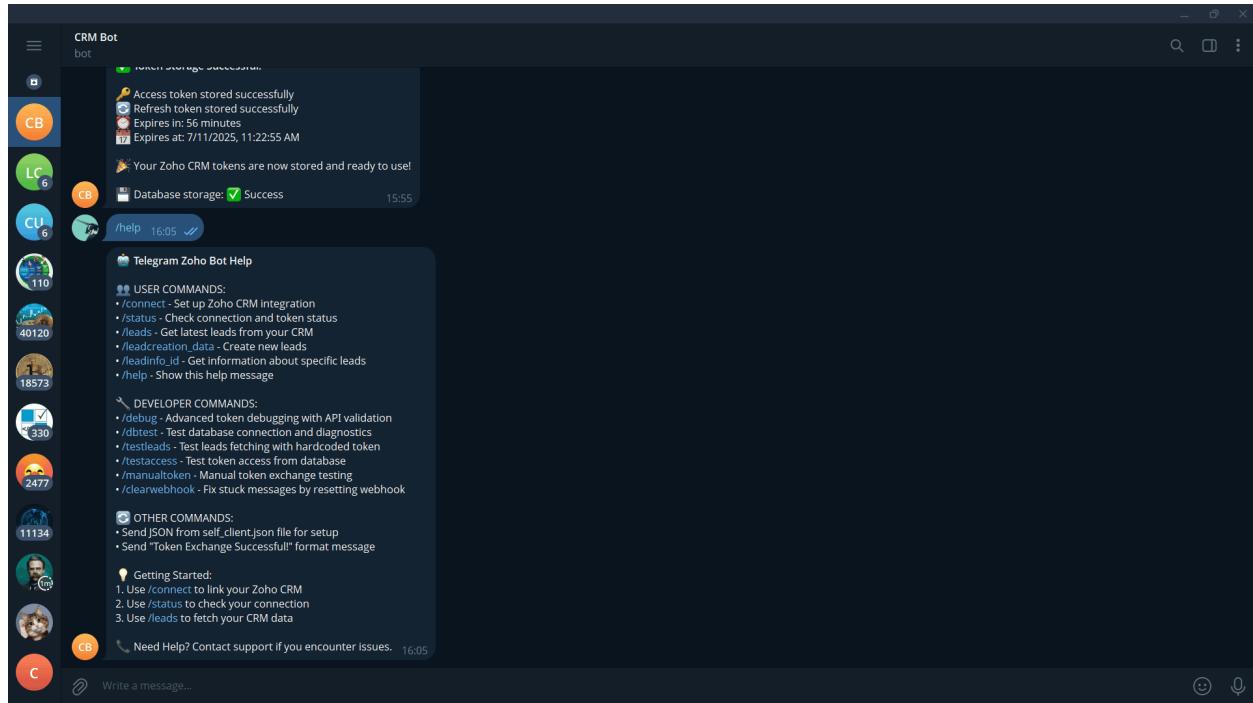
Once the bot receives and stores the credentials successfully in the database, a confirmation message will be shown.



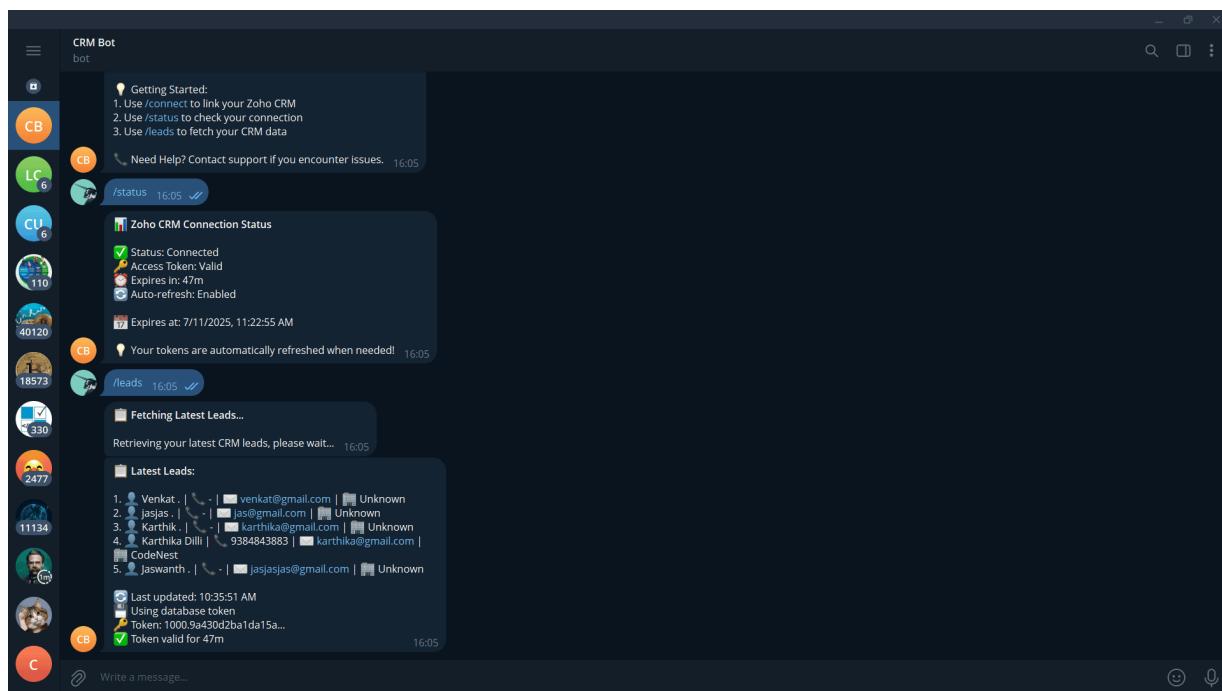
Congratulations , You are now **fully connected** – your Zoho CRM and Telegram bot are ready to work together.

USING TELEGRAM COMMANDS :

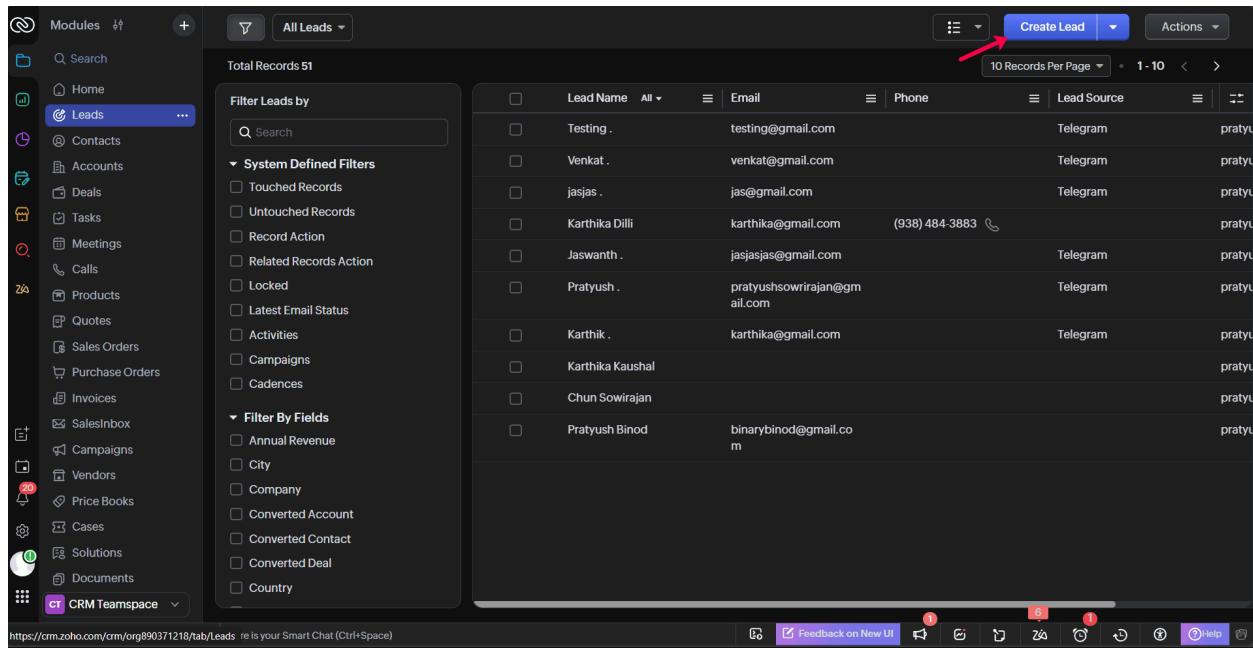
Type **/help** in the bot chat to see a full list of available commands.



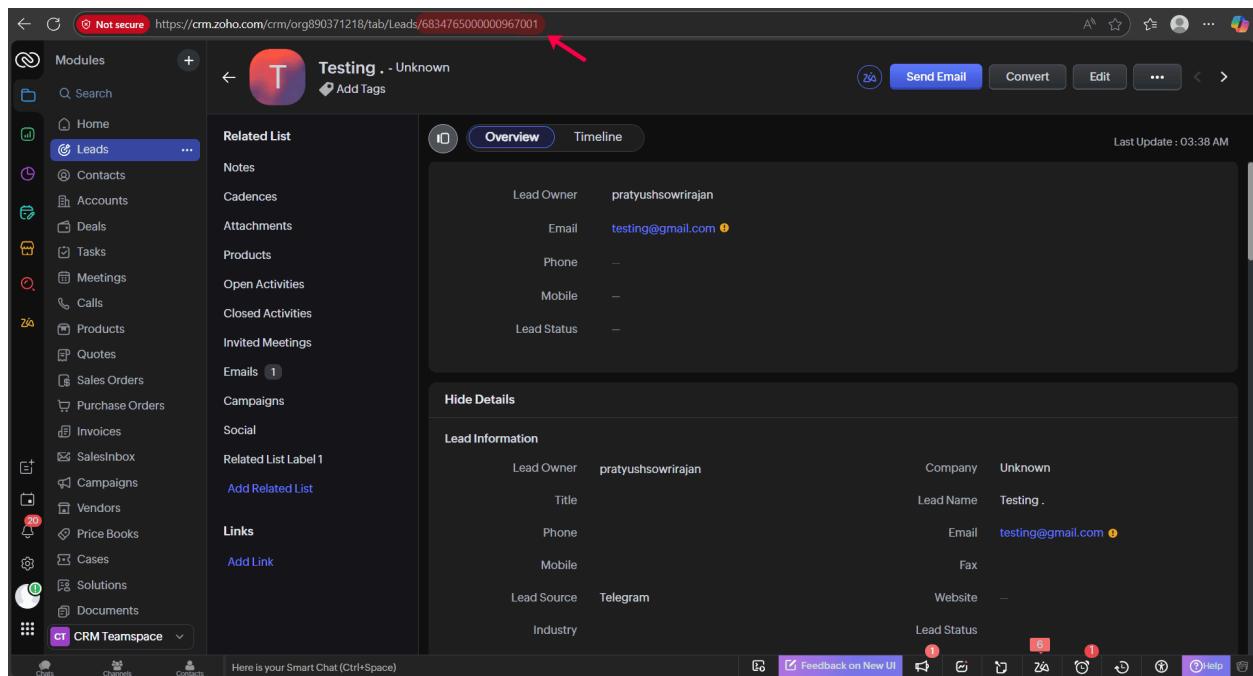
Using **/leads** will fetch the **latest 5 leads** from your CRM.



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

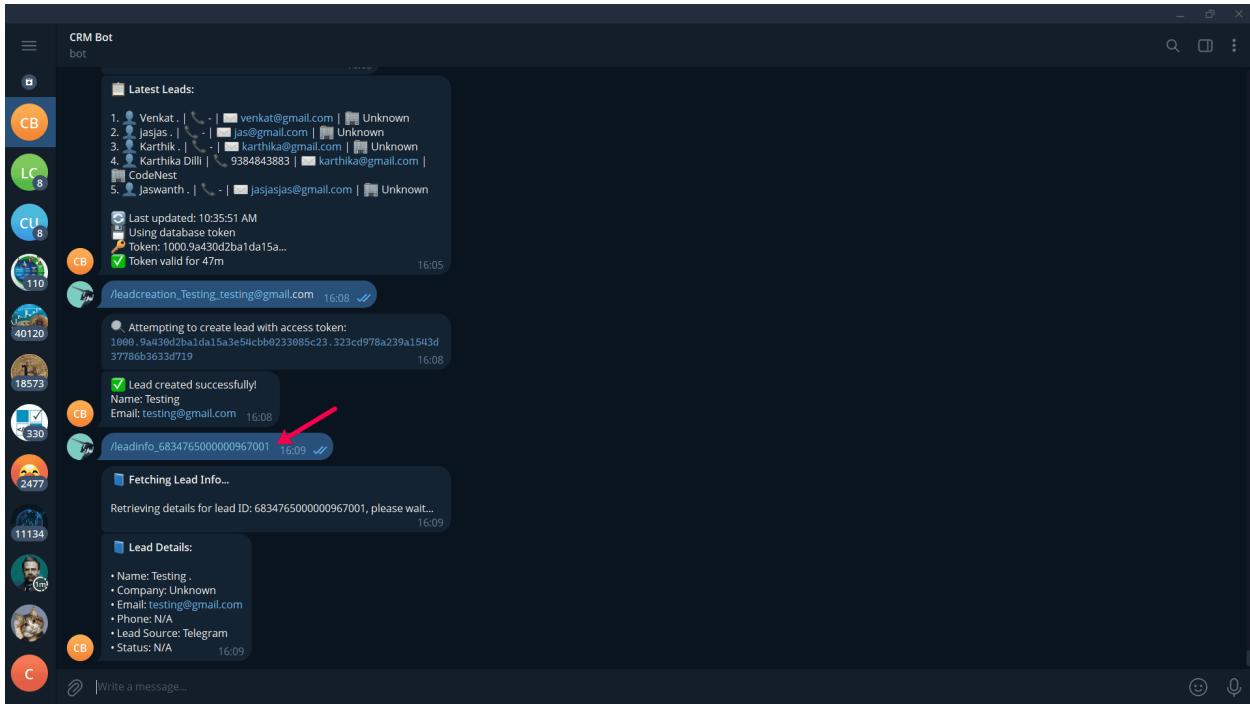


This screenshot shows the Zoho CRM interface for the Leads module. On the left is a sidebar with various modules like Home, Contacts, Accounts, Deals, Tasks, Meetings, Calls, Products, Quotes, Sales Orders, Purchase Orders, Invoices, SalesInbox, Campaigns, Vendors, Cases, Solutions, and Documents. The Leads module is selected. The main area displays a list of leads with columns for Lead Name, Email, Phone, and Lead Source. A red arrow points to the 'Create Lead' button at the top right of the list area. The URL in the address bar is <https://crm.zoho.com/crm/org890371218/tab/Leads>.



This screenshot shows the Zoho CRM interface for a specific lead record. The URL in the address bar is <https://crm.zoho.com/crm/org890371218/tab/Leads/6834765000000967001>. The page displays the lead's details under the 'Overview' tab, including Lead Owner (pratyushsowrirajan), Email (testing@gmail.com), and Phone (—). The sidebar on the left shows related lists like Notes, Attachments, Products, and Open Activities. The right side shows tabs for Overview, Timeline, and Hide Details. The status bar at the bottom indicates 'Last Update : 03:38 AM'. A red arrow points to the URL in the browser's address bar.

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.

The screenshot shows the Zoho CRM interface for a lead named 'Testing'. The left sidebar is the 'Related List' for 'Leads', which includes options like Notes, Cadences, Attachments, Products, Open Activities, Closed Activities, Invited Meetings, Emails (1), Campaigns, Social, Related List Label 1, Add Related List, Links, and Add Link. The main area is the 'Timeline' tab under 'History', showing a timeline of events for July 11, 2025. The events listed are:

- 03:38 AM Email Bounced for recipient testing@gmail.com - Welcoming message for leads by Jul 11, 2025
- 03:38 AM Function Telegram Update was called via Workflow Rule Lead Creation Telegram Update
- 03:38 AM Email Sent to testing@gmail.com - Welcome Email to New Lead via Workflow Rule Send Welcome Mail
- 03:38 AM Lead Created by pratyushsowrirajan Jul 11, 2025

At the bottom, there are various UI icons for feedback, help, and navigation.

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

The screenshot shows a Telegram channel titled 'Lead updates Chat'. It has a pinned message from a bot (@leads) containing lead information: Phone: testing@gmail.com, Email: testing@gmail.com, and several long alphanumeric strings representing API keys and IDs. Below this, there are multiple messages from the bot (@leads) at different times (21:54, 09:49, 09:54, 09:54, 14:00, 14:00, 14:50, 14:50, 16:08, 16:08) announcing new lead creations. Each message includes the lead's name and contact details. The channel interface shows user profiles on the left and standard Telegram message controls at the bottom.

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**