

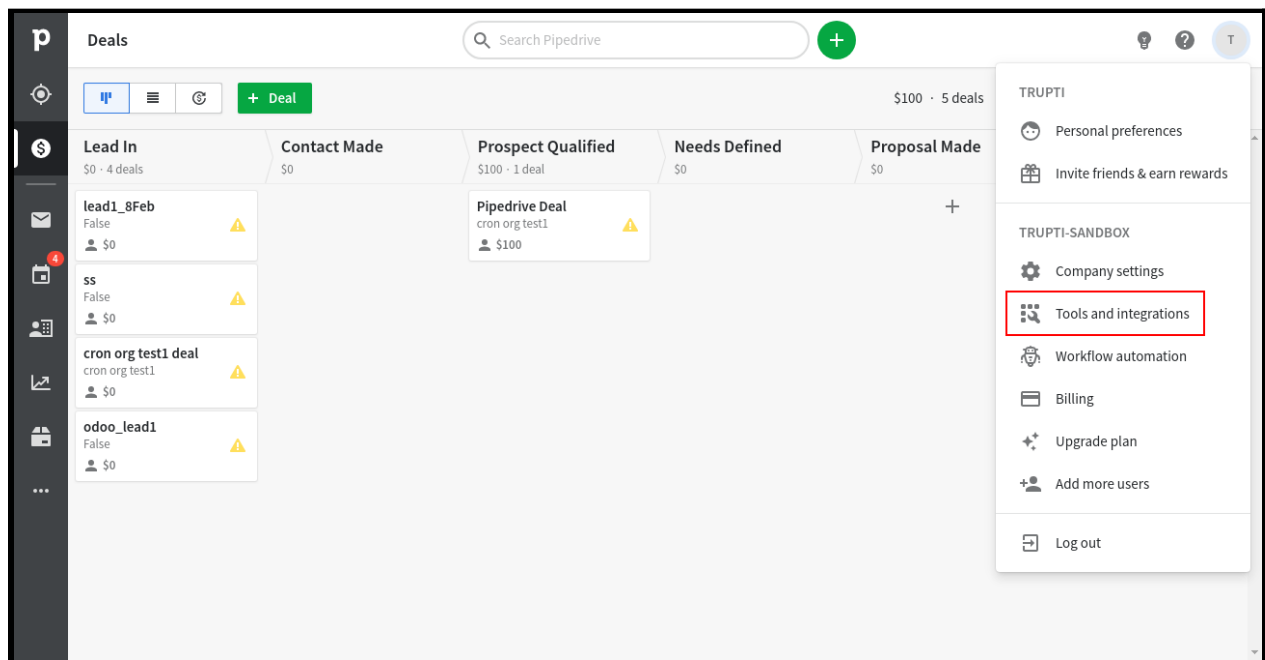
Steps for register app in pipedrive

Pipedrive Configurations

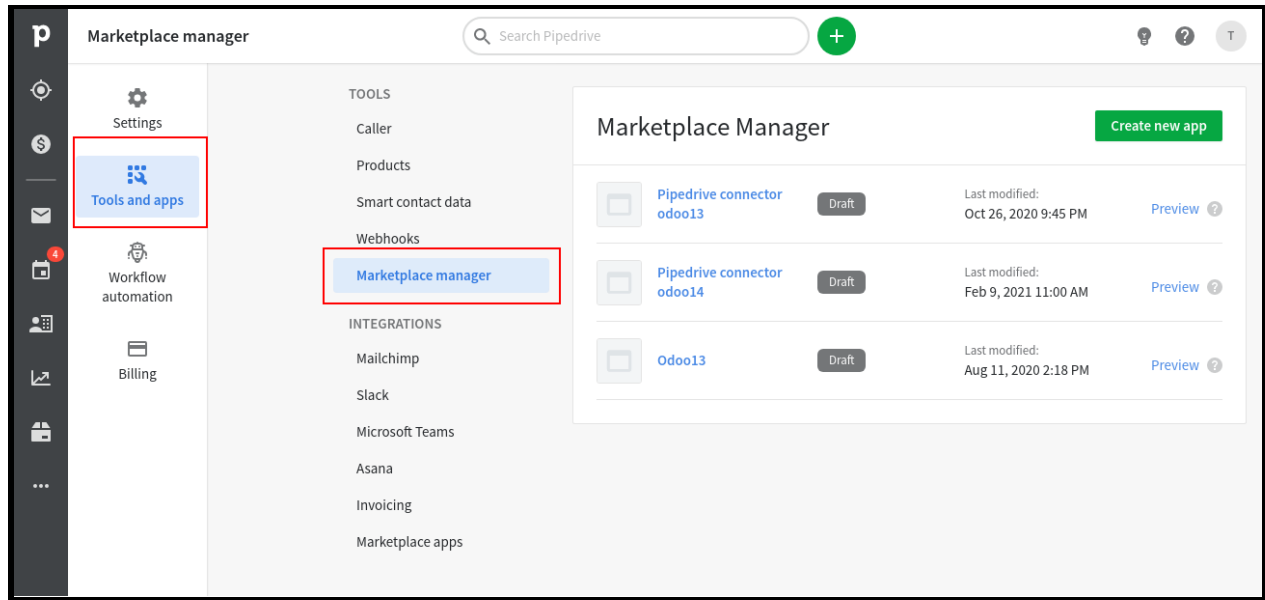
Please Note that if you don't see the Menu/option - **Marketplace Manager** please contact pipedrive help desk they will enable this feature for your account without any additional cost.

To Get Client Secret and Client ID

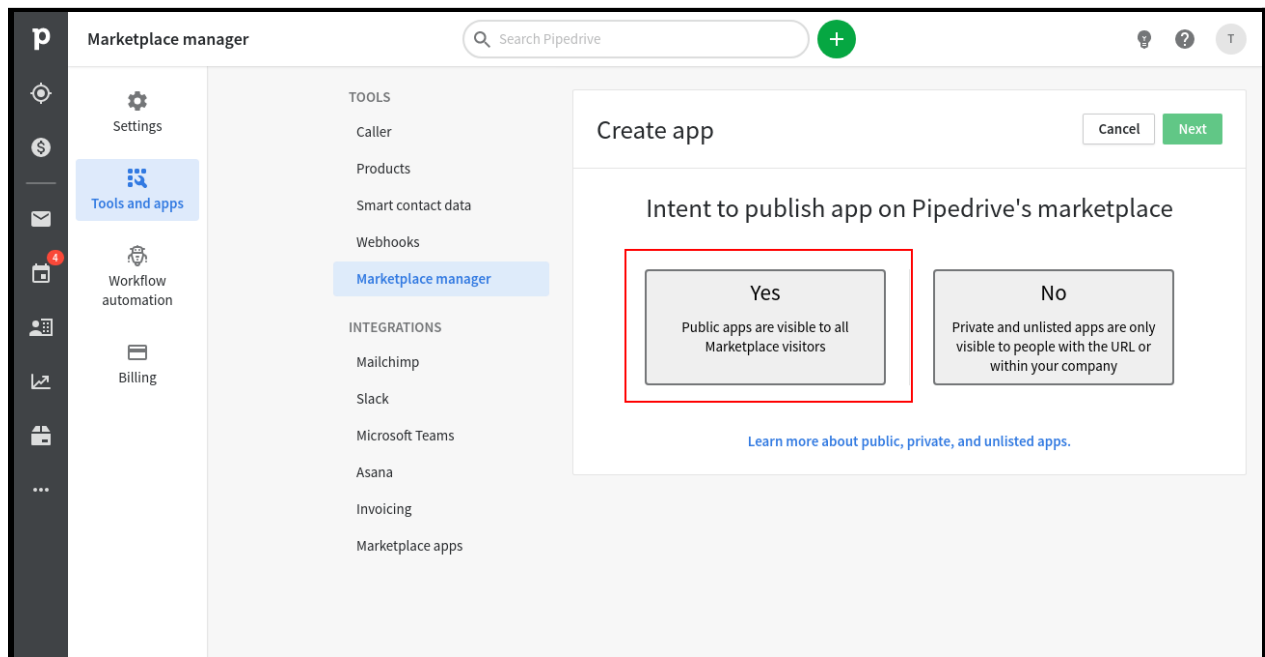
1) In pipedrive dashboard Click on user profile icon -> Select Tools & Integration



2) Goto Marketplace Manager -> Create an app



3) Add an App name



Marketplace manager

Search Pipedrive

Create app
Intent to publish: Yes

Cancel Save

Only the App name and OAuth Callback URL are required to create the app. Other fields marked as required will be validated when sending to review.

General information

App name (required) Pipedrive Odoo Connector max 50 characters

Company trupti-Sandbox
This name will appear publicly on the Pipedrive Marketplace. [Edit](#)

Short summary (required) max 150 characters

Description (required) Write Preview max 1500 characters

Tools: Caller, Products, Smart contact data, Webhooks, **Marketplace manager**

Integrations: Mailchimp, Slack, Microsoft Teams, Asana, Invoicing, Marketplace apps

4) In OAuth & Access scopes add Callback URL & give all access rights.

Marketplace manager

Search Pipedrive

OAuth & Access scopes

Callback URL (required) http://195.201.108.117:8014/get_auth_code

Access scopes (required)

- ☒ Access to basic information
 - ☐ Read only ☒ Full access
- ☒ Deals
 - ☐ Read only ☒ Full access
- ☒ Mail
 - ☐ Read only ☒ Full access
- ☒ Activities
 - ☐ Read only ☒ Full access
- ☒ Contacts
 - ☐ Read only ☒ Full access
- ☒ Products
 - ☐ Read only ☒ Full access
- ☒ Read users data
- ☒ See recent account activity
- ☒ Search for all data
- ☒ Administer account

Before requesting Administer account scope, make sure that your app will work for both admin and non-admin users. [See Permission set effect on this scope](#) for more information.

- ☒ Leads
 - ☐ Read only ☒ Full access
- ☒ Phone calls integration
- ☒ Goals
 - ☐ Read only ☒ Full access
- ☒ Video calls integration

Tools: Settings, **Tools and apps**, Workflow automation, Billing

5) After save you will get Client Id & Client Secret

Marketplace manager

Search Pipedrive

Settings

Tools and apps

Workflow automation

Billing

OAuth & Access scopes

Client ID 2f845832a58849cb

Client Secret 00f63d0ce81059df67bc43fd583245567e3ae65 [Hide](#)

[Generate new client secret](#)

Callback URL (required)

Access scopes (required)

- ☒ Access to basic information [?](#)
 - ☒ Deals [?](#) ☐ Read only ☒ Full access
 - ☒ Mail [?](#) ☐ Read only ☒ Full access
 - ☒ Activities [?](#) ☐ Read only ☒ Full access
 - ☒ Contacts [?](#) ☐ Read only ☒ Full access
 - ☒ Products [?](#) ☐ Read only ☒ Full access
 - ☒ Read users data [?](#)
 - ☒ See recent account activity [?](#)
 - ☒ Search for all data [?](#)
 - ☒ Administer account [?](#)

Before requesting Administer account scope, make sure that your app will work for both admin and non-admin users. [See Permission set effect on this scope](#) for more information.

OAuth & Access scopes

Client ID c9d53b11b87ce51d

Client Secret 263af57eeb7ad6384bc3488a169eb1ca298aceab [Hide](#)

Callback URL (required)

Odoo Configurations

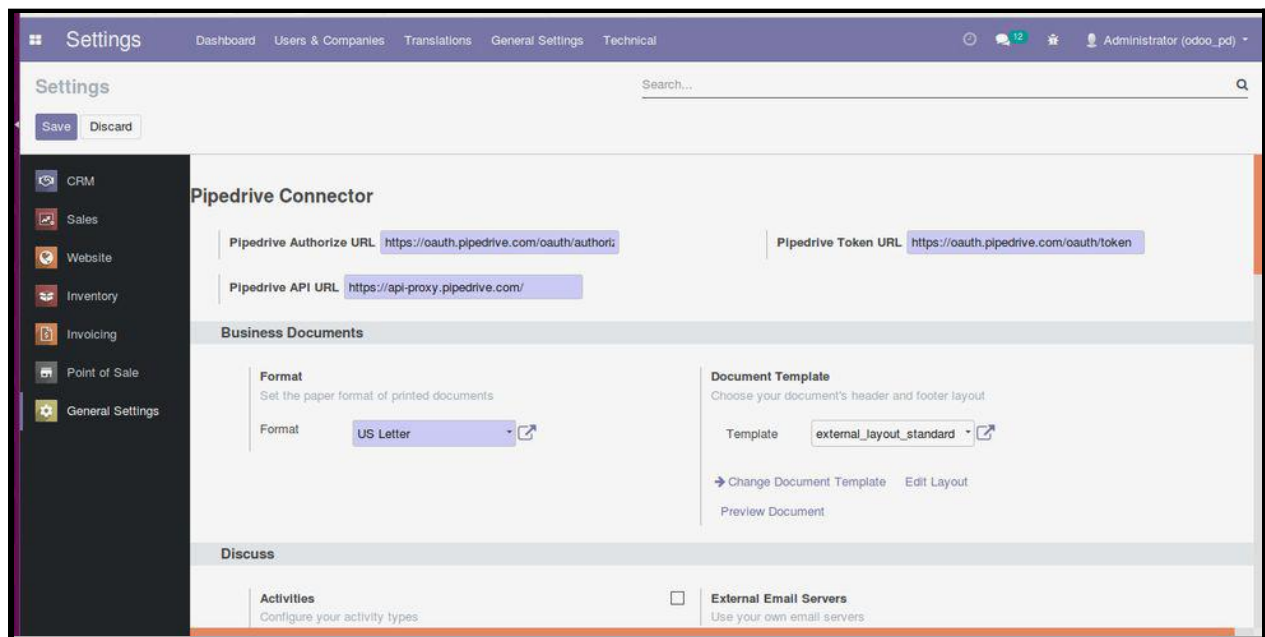
To provide pipedrive URLs follow steps below:

Settings->General Settings->Pipedrive Connector

Set Pipedrive Authorize URL:<https://oauth.pipedrive.com/oauth/authorize>

Set Pipedrive Token URL:<https://oauth.pipedrive.com/oauth/token>

Set Pipedrive API URL:<https://api-proxy.pipedrive.com/>



Goto **Settings** → **User & Companies** → **Open Company** → Click on pipedrive connector and paste the **Client ID** and **Client Secret** on the screen.

Settings | Dashboard | Users & Companies | Translations | General Settings | Technical

Companies / My Company

Save | Discard

1 / 1

My Company

General Information | **Pipedrive Connector**

Pipedrive Configuration

Authenticate | Refresh Token

Credentials

Client ID: c9d53b11b87ce51d

Client Secret: 263af57eeb7ad6384bc3488a169eb1ca298aceab

Access Token:

Refresh Token:

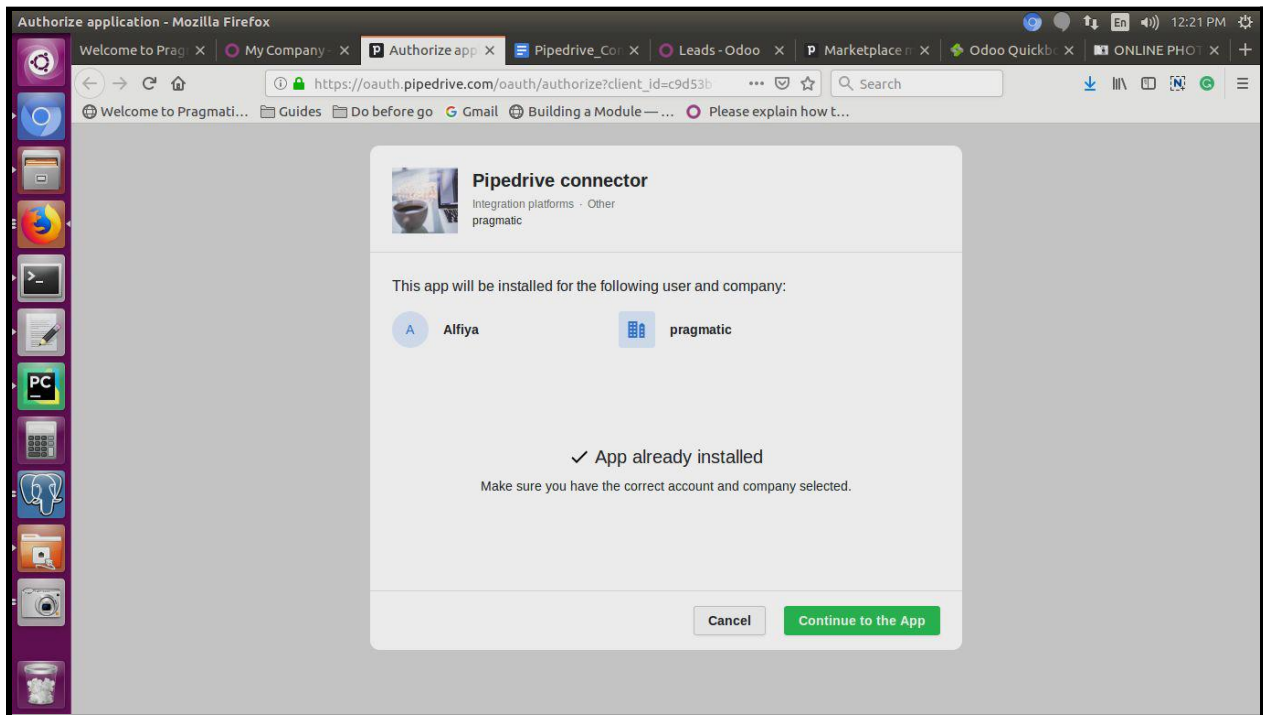
Token Type: Bearer

Redirect URI: http://localhost:8012/get_auth_code

Sync

Import Organization | Import Contacts

Click on the **Authenticate** Button the following screen will appear. Select the app and click on continue.



If successful, You get a message: "You can close this window now". Else, check if you have entered all the details properly.

You are now connected with pipedrive and do all that you want easily!!!

Pipedrive Configuration

[Authenticate](#) [Refresh Token](#)

Credentials

Client ID	c9d53b11b87ce51d
Client Secret	263af57eeb7ad6384bc3488a169eb1ca298aceab
Access Token	5832396:8979240:c0d415ce9c7b54859b74ea0e71f941ea93972ba5
Refresh Token	5832396:8979240:044e8a0a28d36aca270a0bb616a7fd4edc7d6ee4
Token Type	Bearer
Redirect URI	http://localhost:8012/get_auth_code

Sync

[1.Import Organization](#)[3.Import Products](#)[5.Import Deals\(In Proposal\)](#)[Import Activities](#)

[2.Import Contacts](#)[4.Import Stages](#)[6.Import WON/LOST Deals](#)

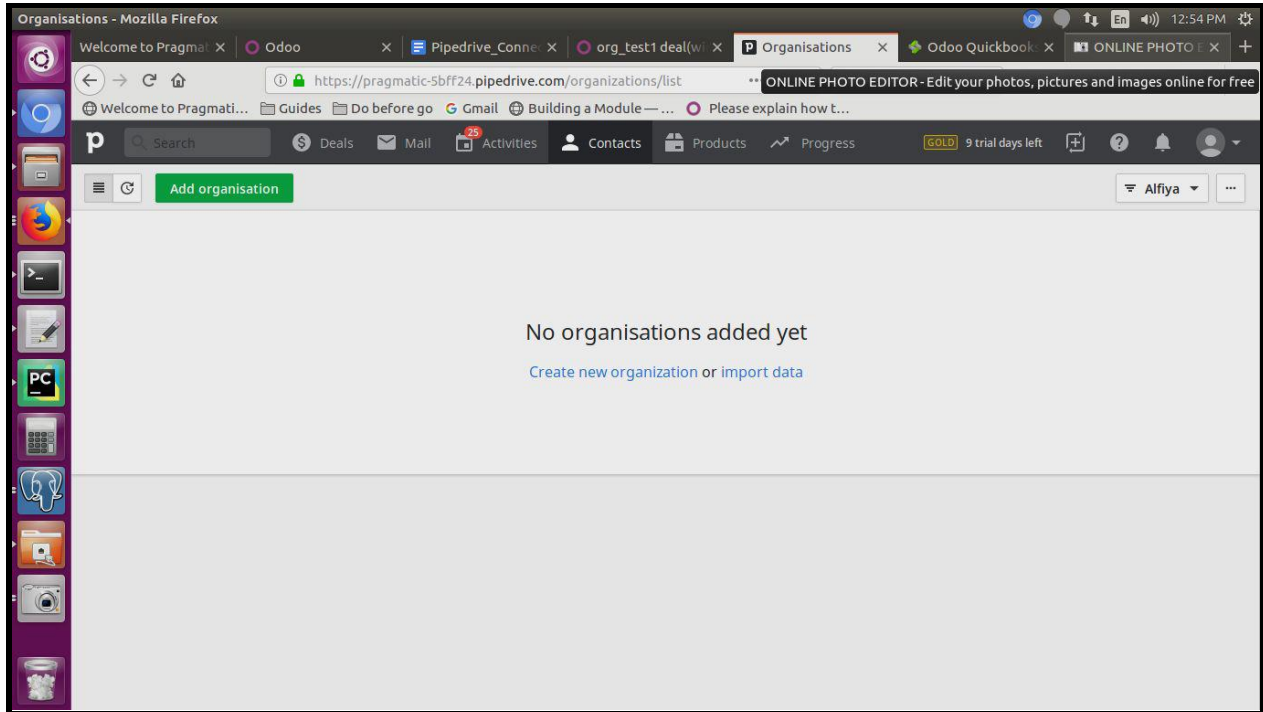
Importing Data:

Click on a button named Import Organization.This button will import(get) all organizations from Pipedrive to Odoo.

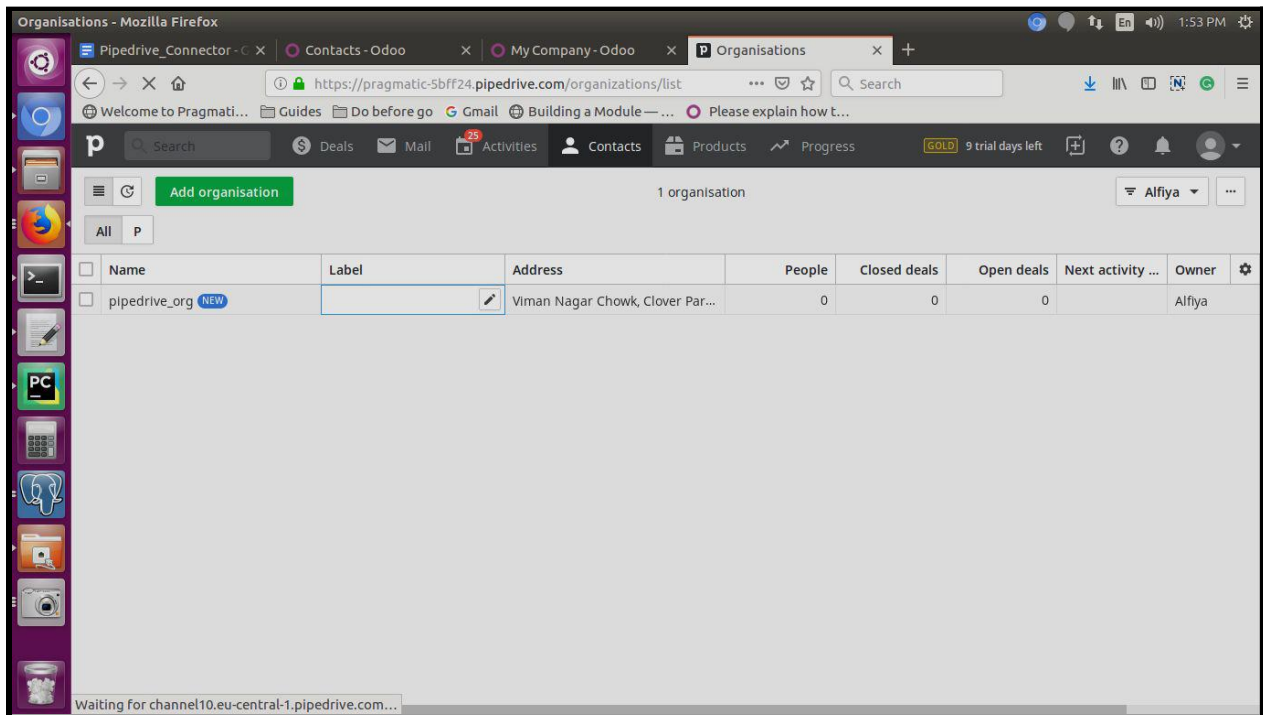
The very first thing is you need to add organization in Pipedrive.
Access your pipedrive account.

Go to->Contacts->Organizations

Click on Add Organization and fill in the necessary details.

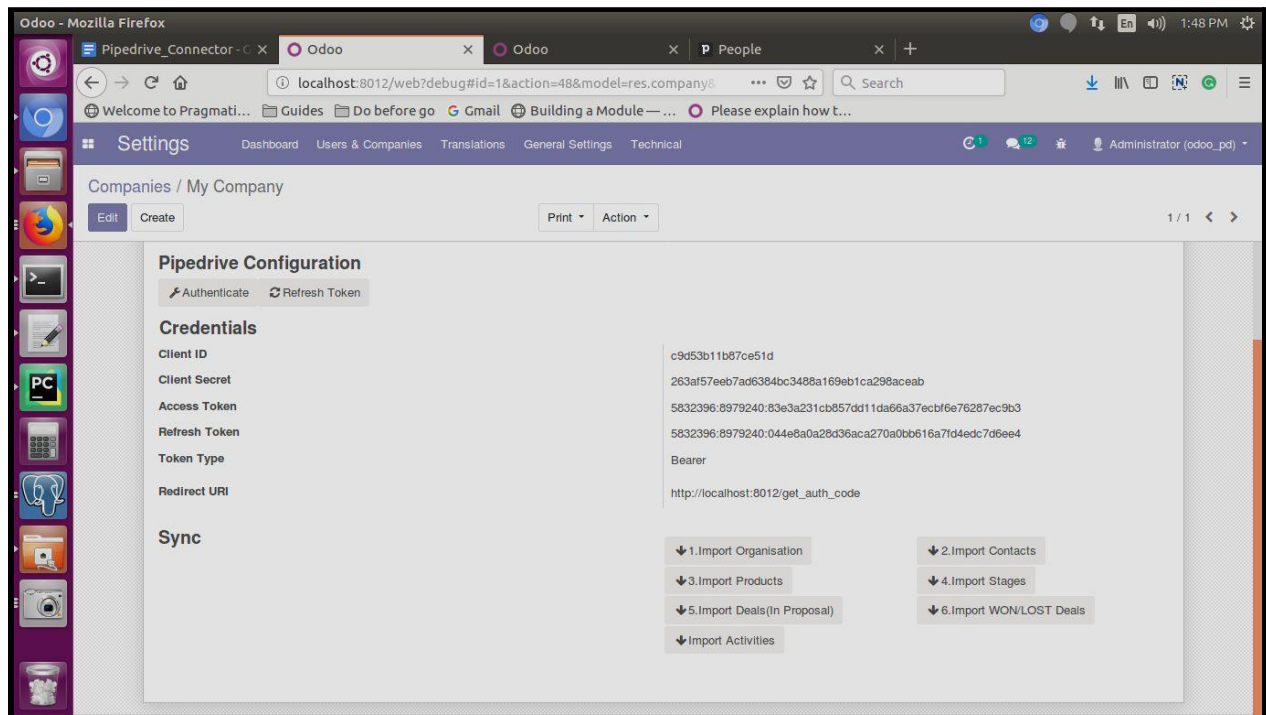


Fill in the details and click on Save.

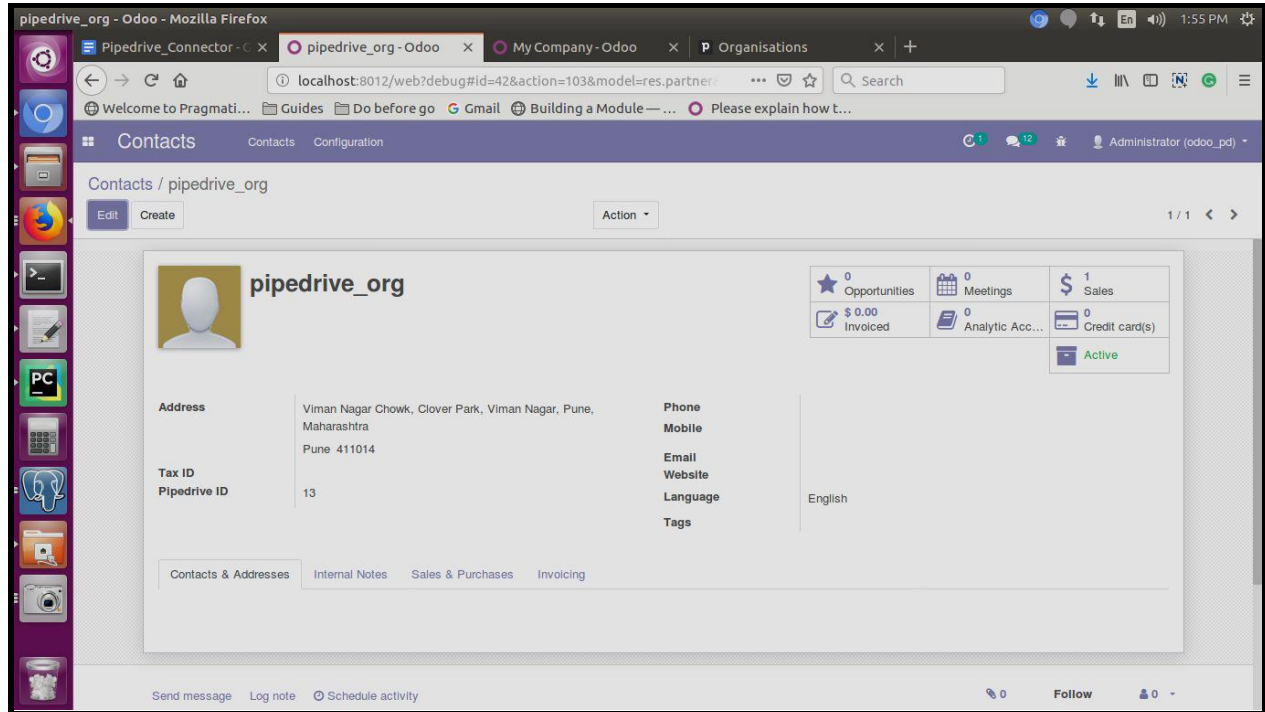


If you see above image, pipedrive_org is the organization saved in Pipedrive. To import in odoo, follow the steps mentioned below:

1. Click on the Import Organization.



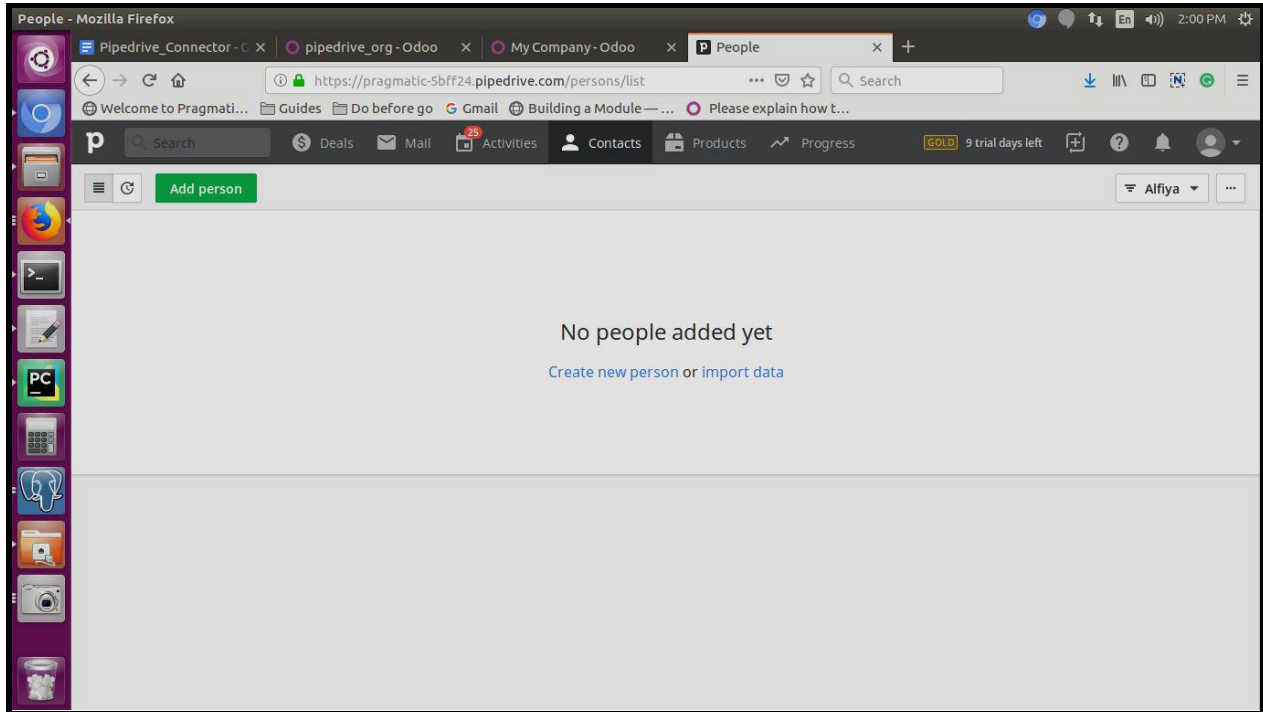
Your organization will be imported to odoo. In order to verify, Go to contacts and search for the organization name of pipedrive.



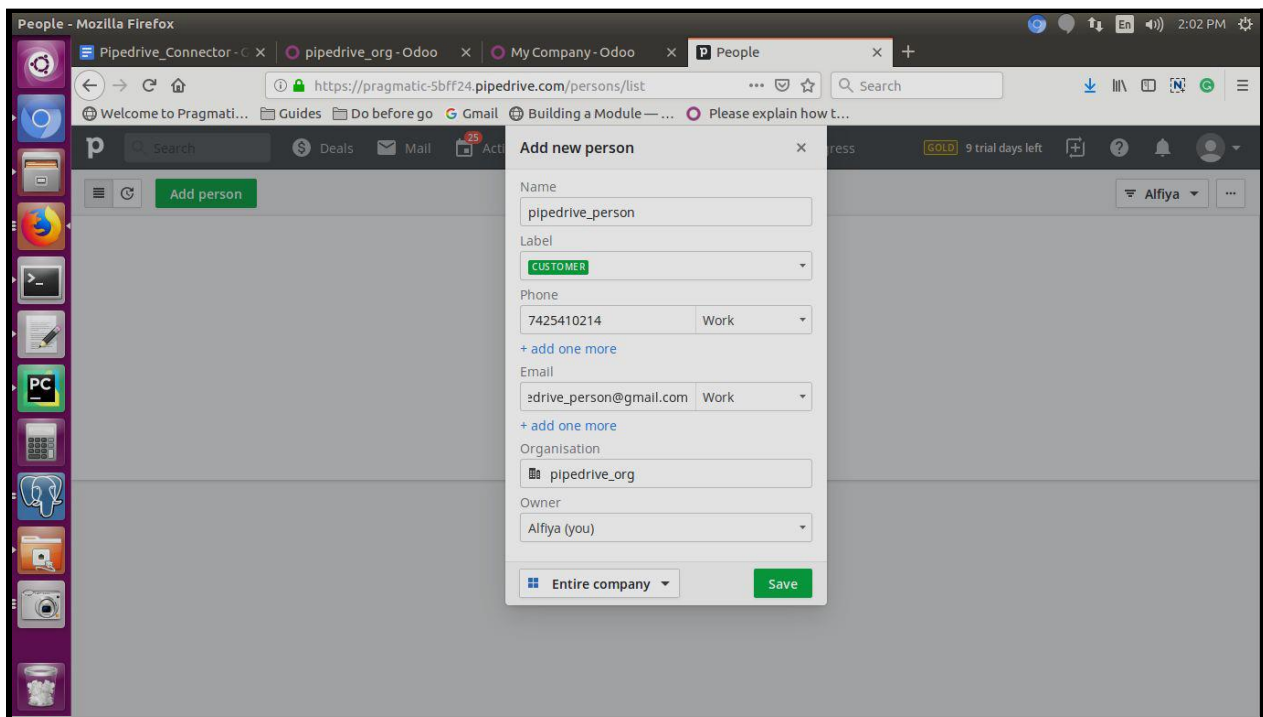
If you click on Edit and check, the company type preserved will be of type company.

2.Importing Contacts

This will import pipedrive people to odoo contacts.
To do so, click on Contacts -> People

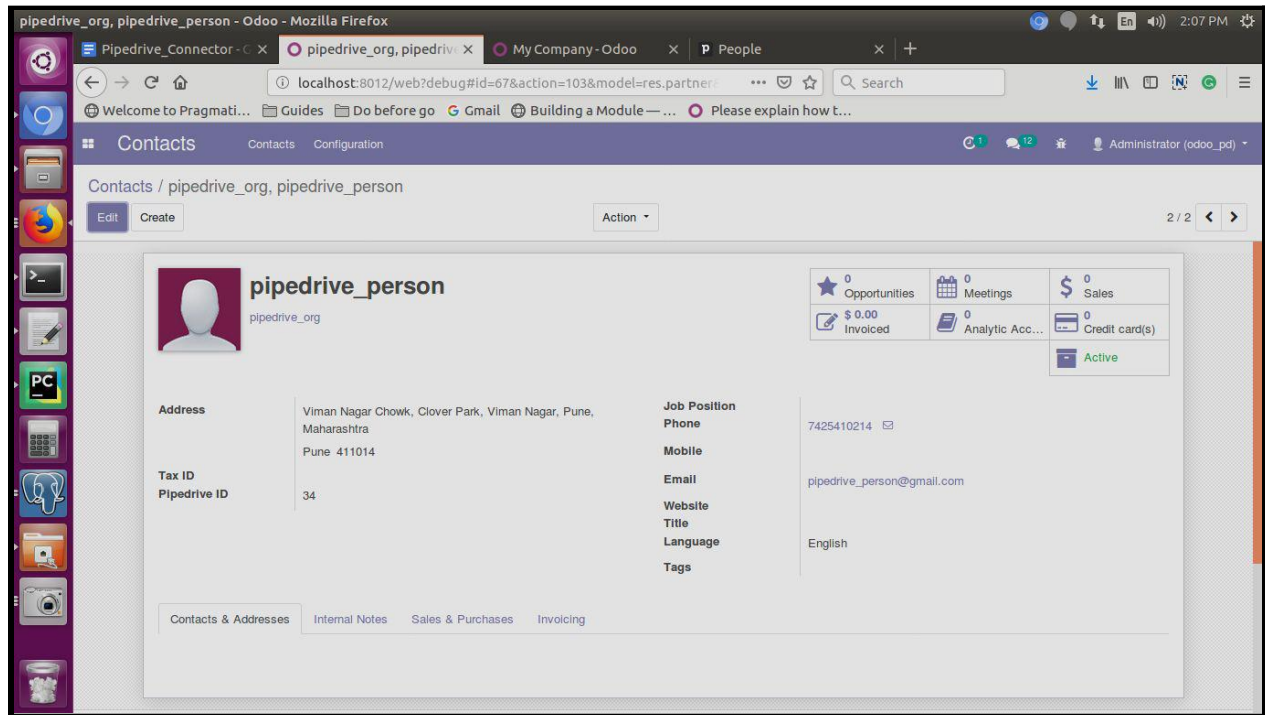


Click on Add person



After Clicking on Save, Contacts are saved in Pipedrive.

To import to odoo, Click on button->Import Contacts



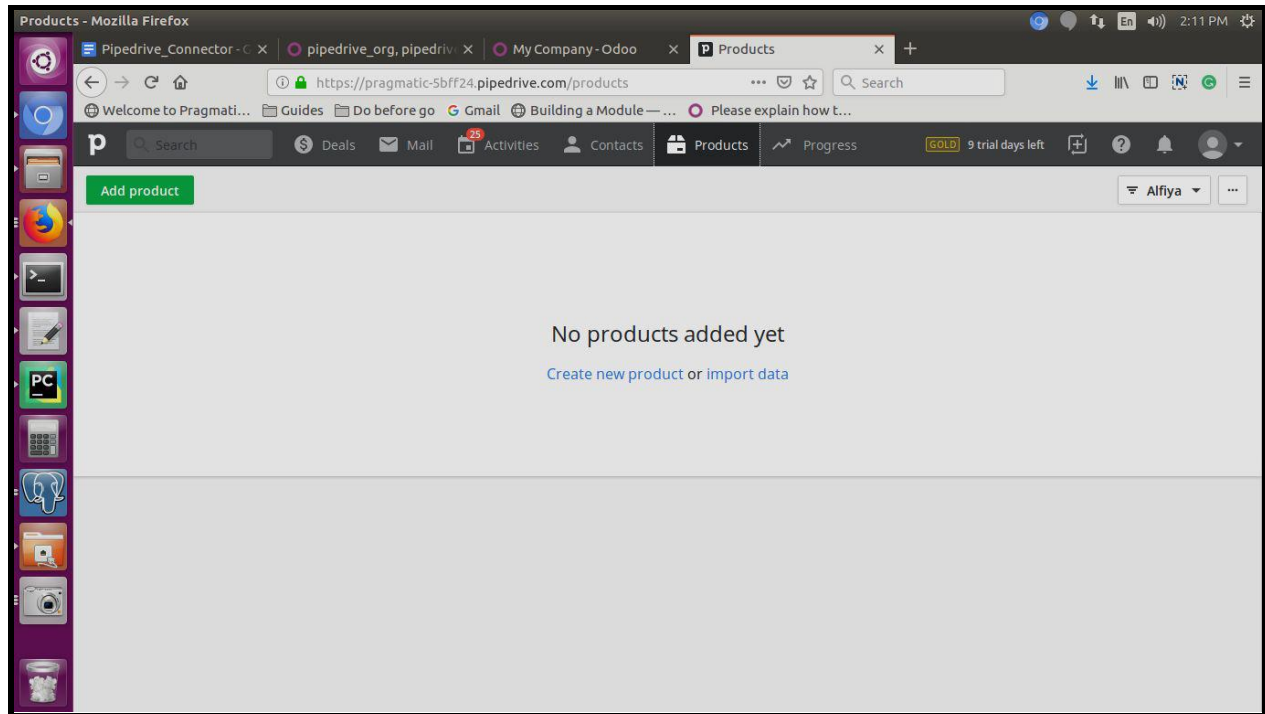
*Points to observe:

- Company type :individual.
- Person gets allocated to that particular organization.

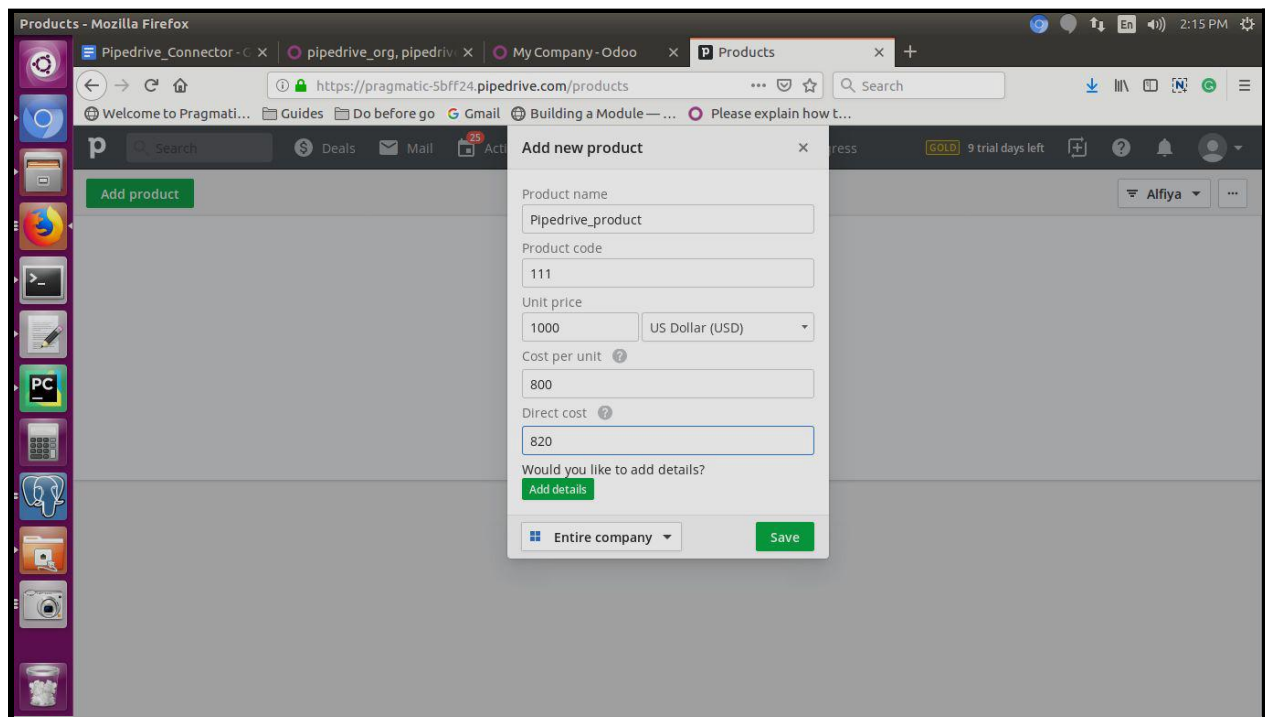
3.Import Products:

Create a product in piedrive.

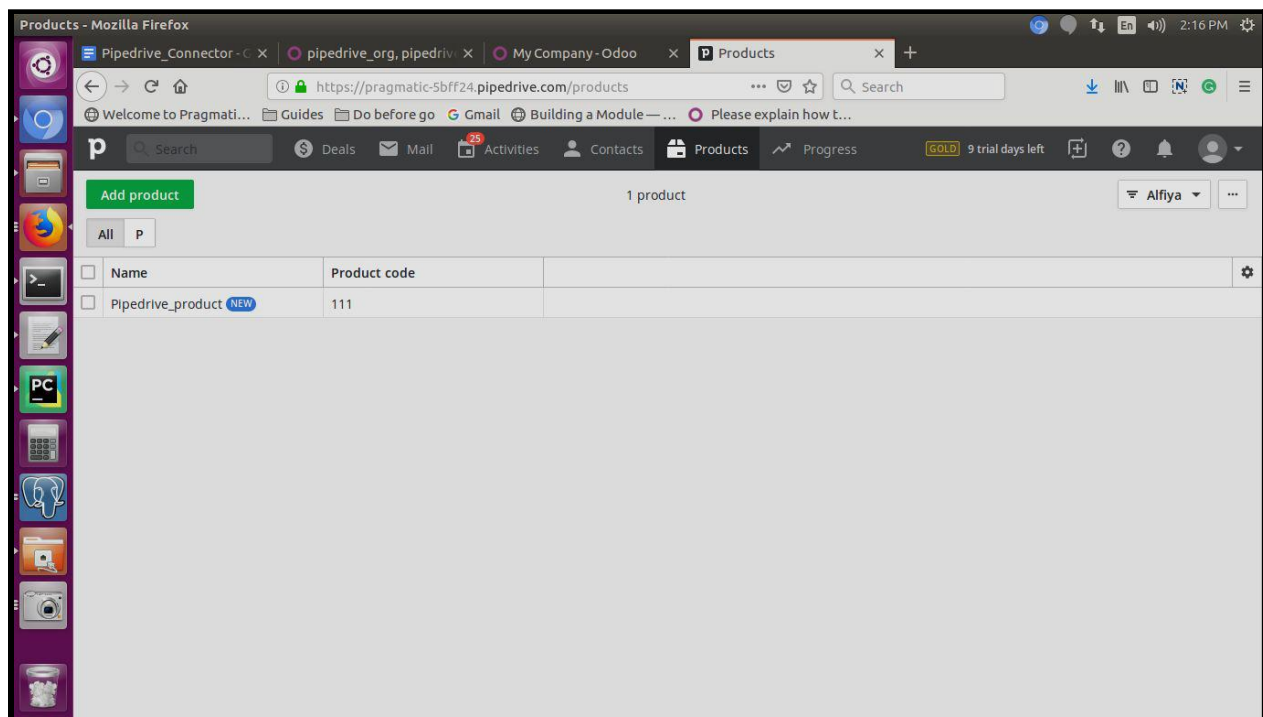
Products->Add product



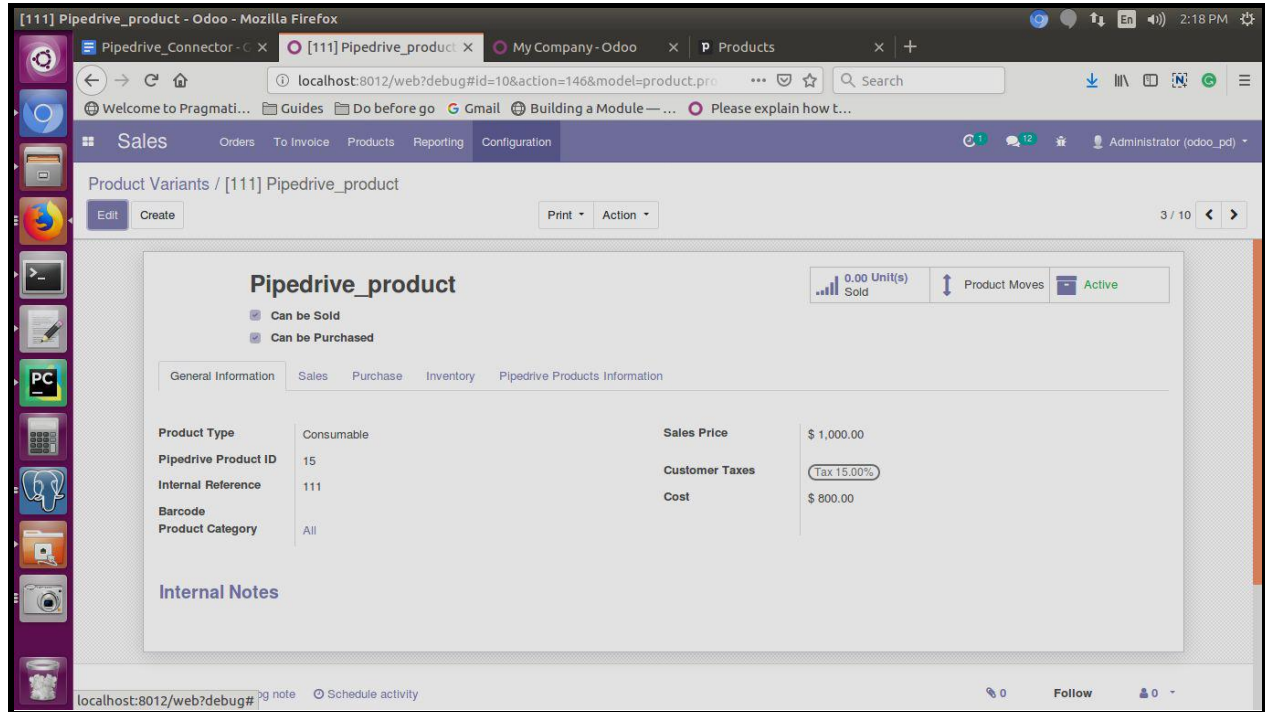
Create a product in Pipedrive.



After clicking on Save,the product will be saved in Pipedrive.



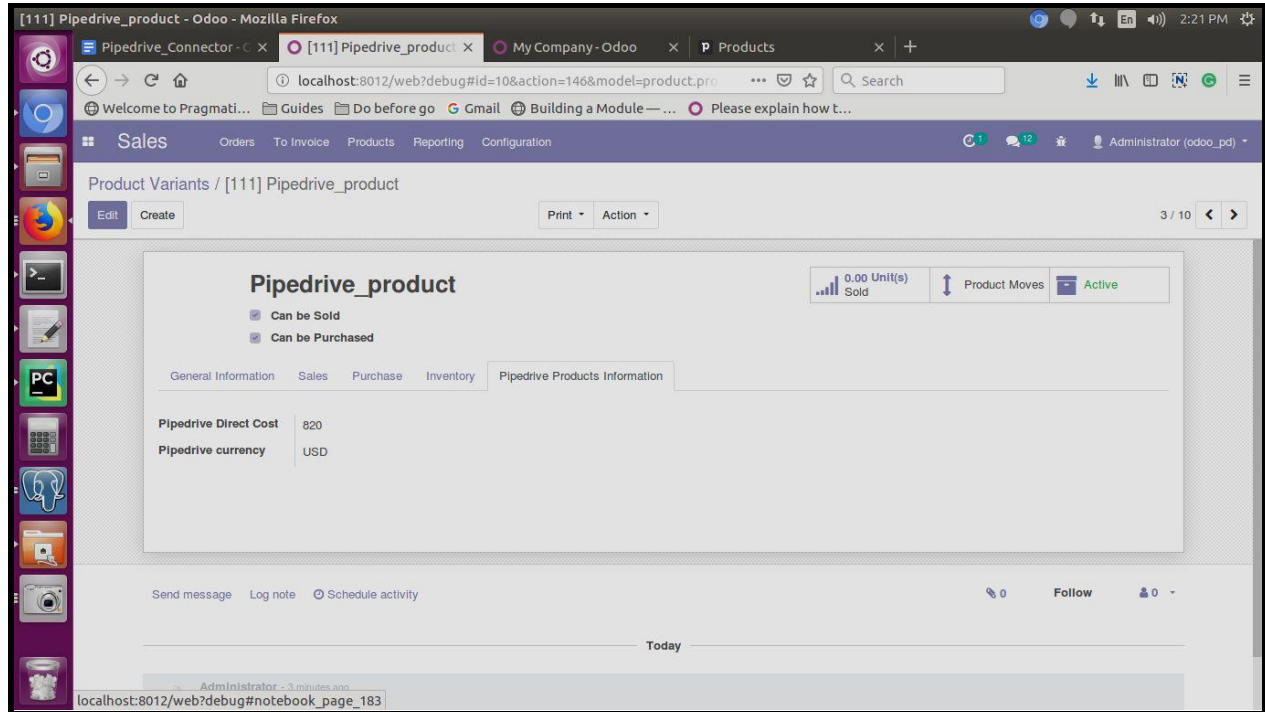
To import,Click on Import Products



*Points to be observed:

1.Product code gets mapped to Internal Reference,as can be seen above.

2.Pipedrive Direct Cost and currency gets saved into the tab of Pipedrive Products Information.



4.Import Stages

To get deals of pipedrive to odoo,you need to import stages.

Note that:Import stages are required only once.You need not import it again.

Click on Import Stages and proceed further.

5.Import Deals(In Proposal)

This will import the deals that are still in progress in Pipedrive.

Note that you can add an activity as well when creating a deal.

Firstly,create a deal in Pipedrive.

Add deal

×

Contact person name

👤

pipedrive_person

Organisation name

🏢

pipedrive_org

Deal title

pipedrive_org deal

Deal value

120

US Dollar (USD) ▼

[Attach products](#)

Pipeline stage

Deal probability

54

%

Expected close date

31/05/2019

🏢

Entire company ▼

Save

Once you save the deal,click on it and do the further steps:

Title	Value	Organisation	Contact person	Expected clo...	Next activity ...	Owner
pipedrive_org deal NEW	\$120	pipedrive_org	pipedrive_person	31 May 2019		Alfiya

pipedrive_org deal

\$120 [Add products](#) [pipedrive_person](#) [pipedrive_org](#)

0 days 0 days 0 days

Prospect Qualified 54% 31 May 2019

IMPORTANT FIELDS GOLD

A simple way to improve your data quality. Set deal fields as important to remind your team to fill in crucial information.

[Set up](#) [Dismiss](#)

DETAILS [Customise fields](#)

What else do you know about the deal?

[Add details](#)

ORGANISATION

[Take notes](#) [Add activity](#) [Propose times](#) [Send email](#) [Upload files](#) [Create invoice](#)

[Click here to take notes...](#)

PLANNED

You have no upcoming activities.

[+ Schedule an activity](#)

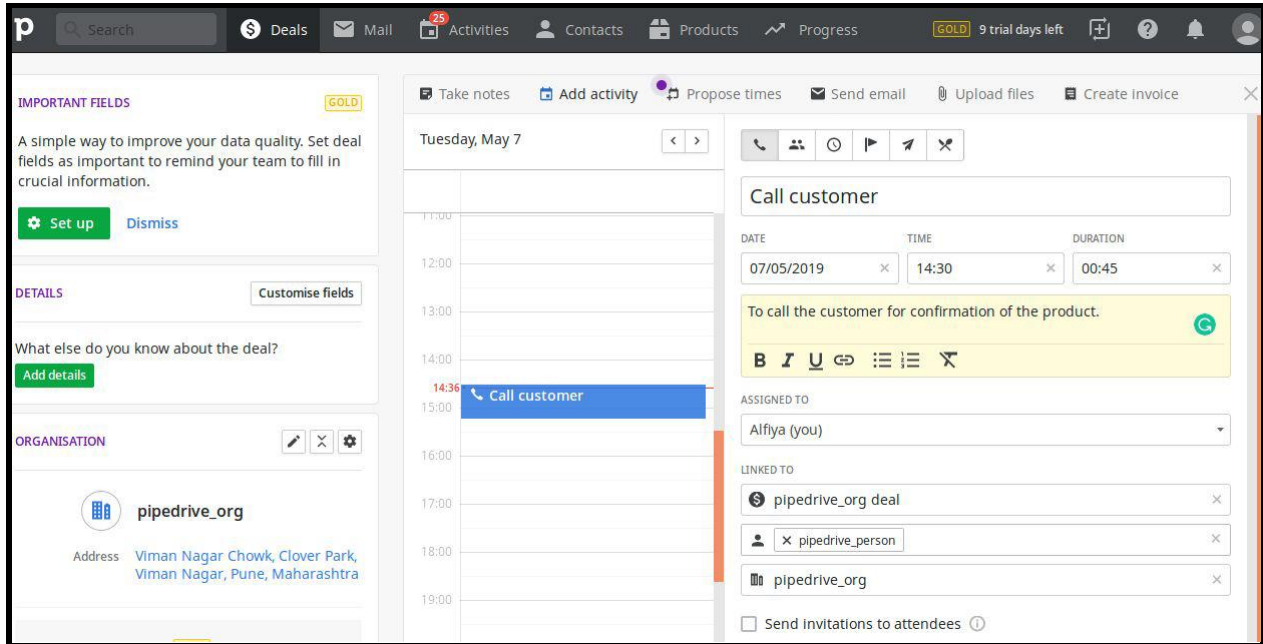
PAST

[ALL](#) [ACTIVITIES](#) [NOTES](#) [EMAILS](#) [INVOICES](#) [FILES](#) [CHANGELOG](#)

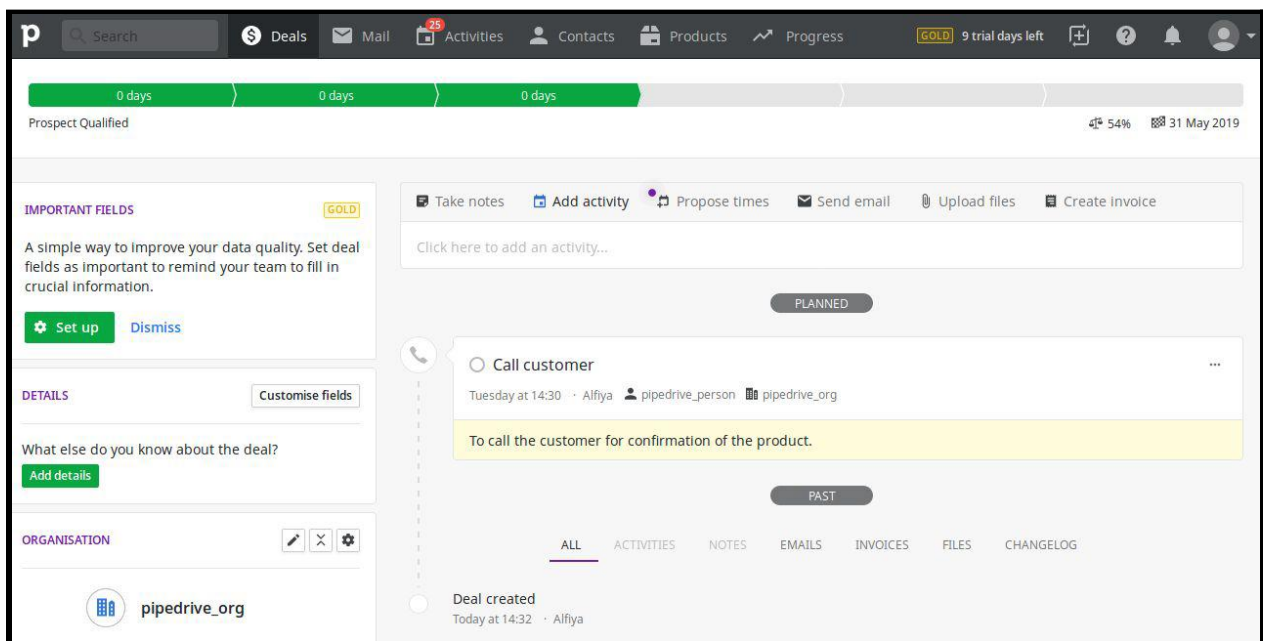
[Deal created](#)

You can now add activities to your deal.

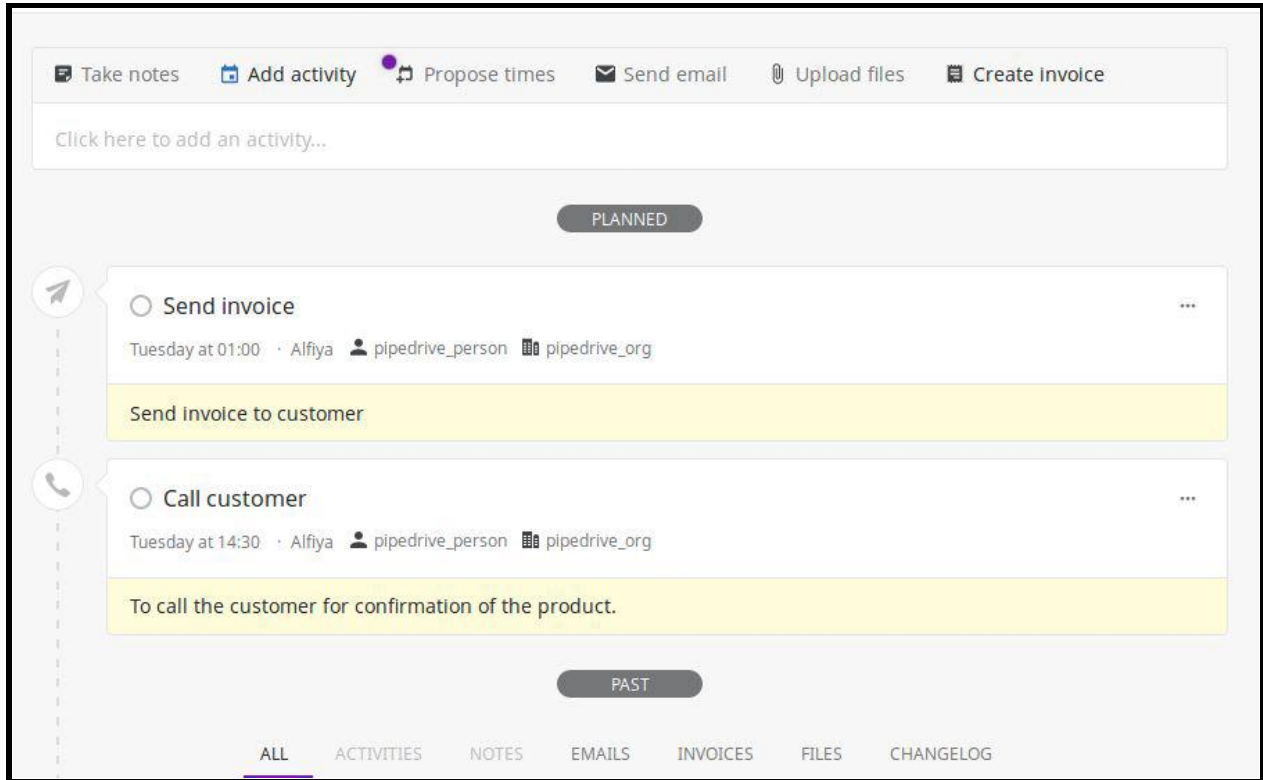
Click on Add activity



Click on Save, the activity gets associated with that particular deal.



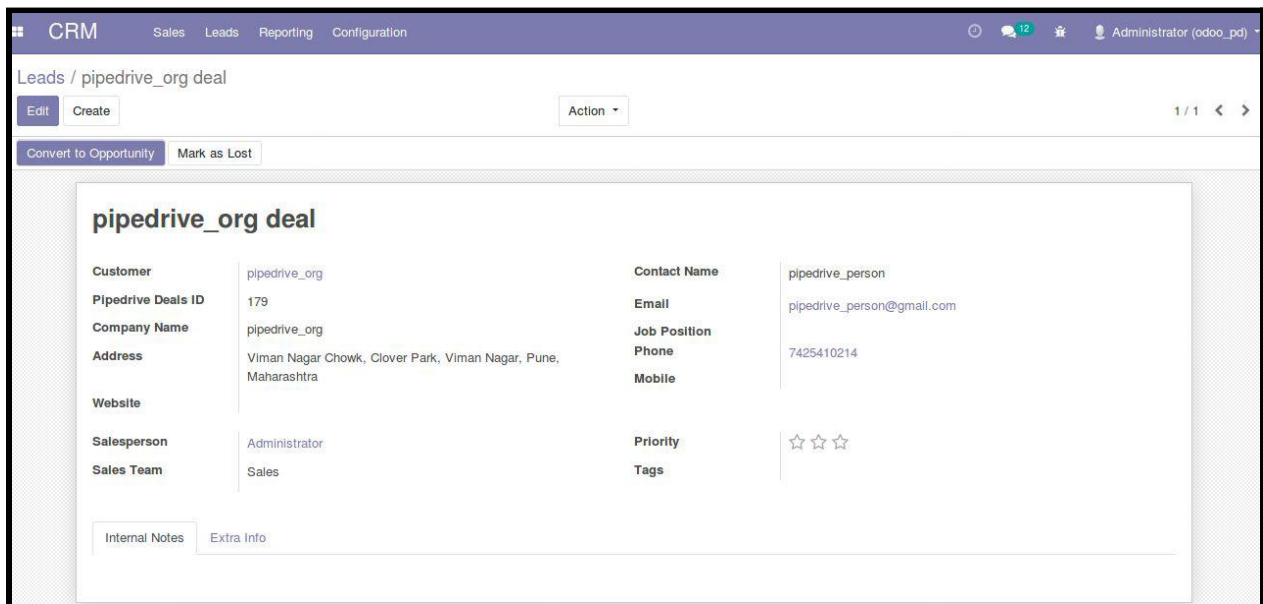
You can add more than one activity for a deal.



In order to import deals as well as activity, ensure that you first Click on Import Deals(In proposal) and click on Import Activities.

In order to check if deals and activities are imported to odoo.

Go to->CRM->Leads



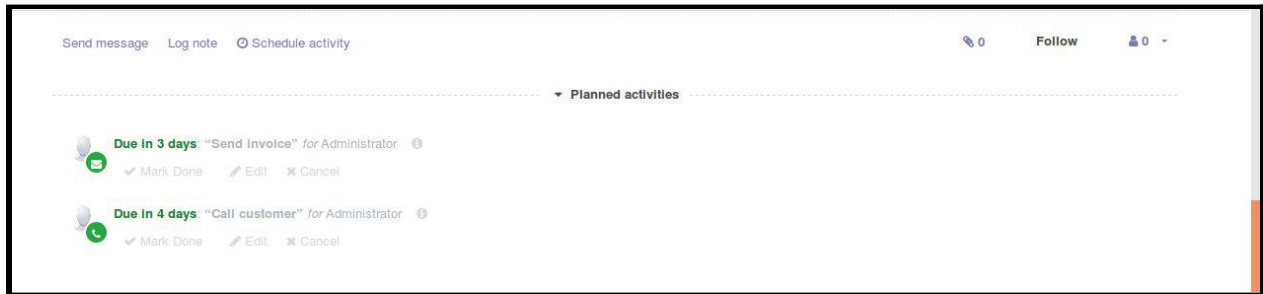
In order to get the deal in the pipeline, you just need to click on Convert to opportunity.

To get activities associated with the deal,you just need to scroll down.

Activities associated with piedrive_org deal:

1]Mail activity

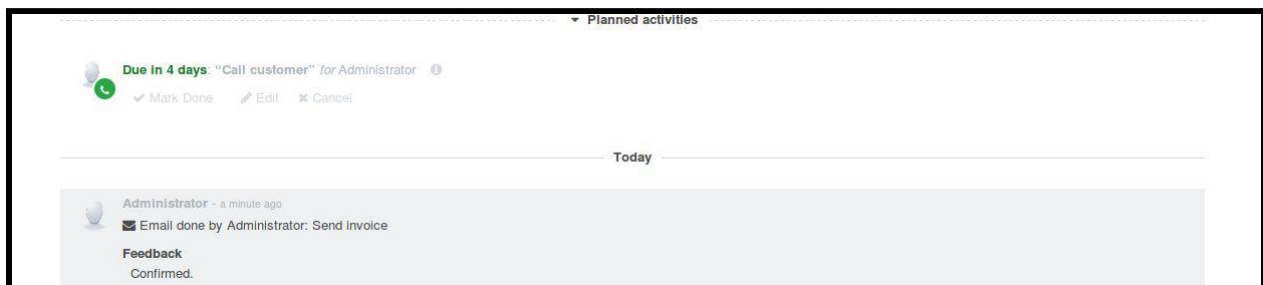
2]Call activity



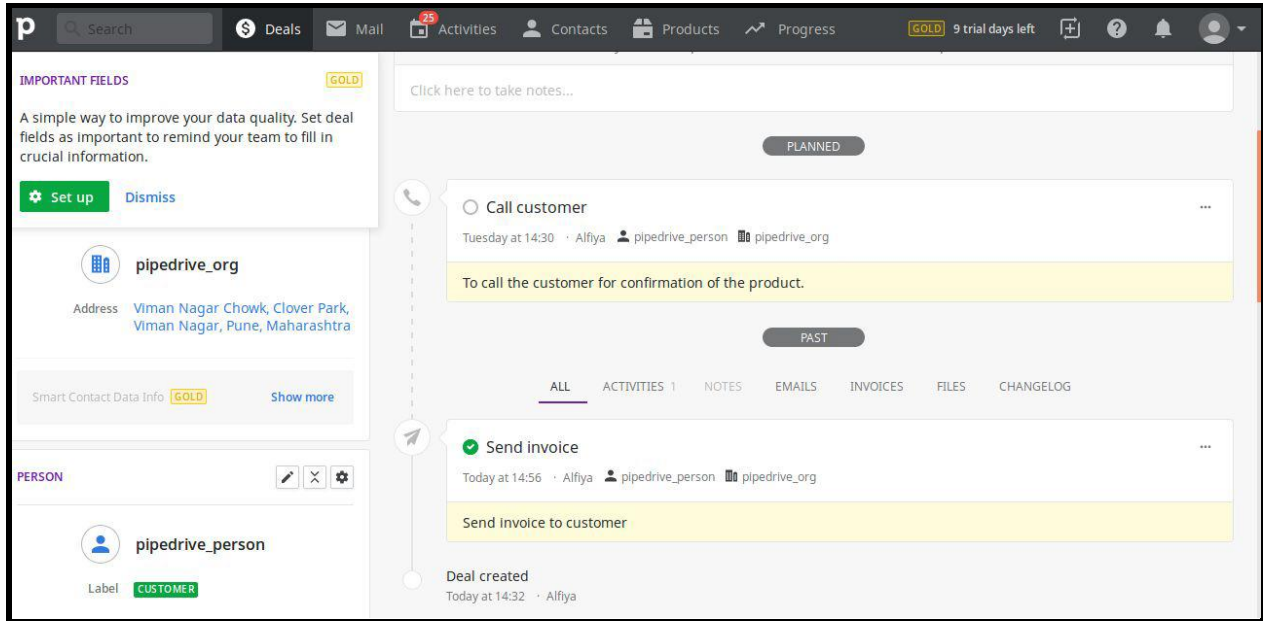
You can also mark activity as done,which will replicate the same in pipedrive.



Once u click on Mark done,provide a feedback and click on the button “Done” ,which means the activity is performed and needs no reminders.



To check in pipedrive,if that particular activity is marked done,just go to the same deal in pipedrive and refresh the page.

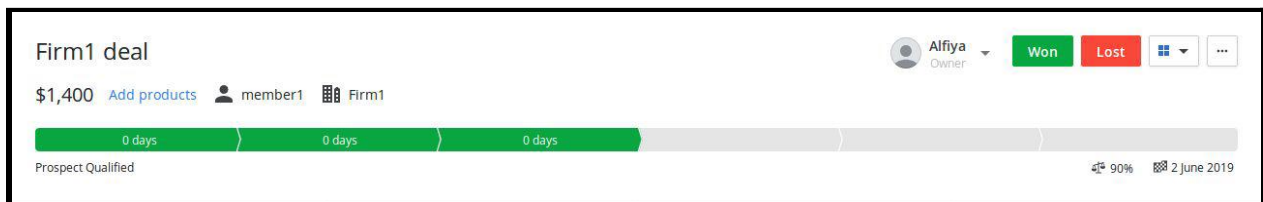


If you observe above, Send invoice activity has been marked done in pipedrive as well.

6) Import Won/Lost Deals

This will import deals that are either won or lost in pipedrive.

Create a won deal in pipedrive. Follow the same process as above. Just to mark it as won, click on Won button at the right hand side.



Once won deal is created in pipedrive, Click on Import Won/Lost Deals.

Make sure you click on Import Activities as well to get activities of Won/Lost Deals.

CRM							
Leads							
<div> <div>Create</div> <div>Import</div> </div> <div> <div>Search...</div> <div> <div>Filters</div> <div>Group By</div> <div>Favorites</div> </div> <div>1-2 / 2</div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> </div>							
Created on	Lead	Contact Name	City	Country	Email	Phone	Sales Team
05/03/2019 15:16:50	Firm1 deal	member1			member@gmail.com	7454151204	Sales
05/03/2019 14:42:27	pipedrive_org deal	pipedrive_person			pipedrive_person@gmail.com	7425410214	Sales

The above won deal is displayed in light gray which identifies this deal is won.

The screenshot shows the Odoo CRM interface. The top navigation bar includes 'CRM', 'Sales', 'Leads', 'Reporting', and 'Configuration'. The user is logged in as 'Administrator (odoo_pd)'. The main header indicates 'Leads / Firm1 deal'. Below this, there are buttons for 'Edit', 'Create', and 'Action'. A secondary bar contains 'Convert to Opportunity' and 'Mark as Lost'. The main content area displays the details for 'Firm1 deal', which is marked as 'Won' with a green badge. The details are organized into two columns:

Field	Value
Customer	Girme
Pipedrive Deals ID	180
Company Name	Firm1
Address	Kharadi Bypass Road, Raghoba Patil Nagar, Thite Nagar, Wadgaon Sheri, Pune, Maharashtra, India
Website	
Salesperson	Administrator
Sales Team	Sales
Contact Name	member1
Email	member@gmail.com
Job Position	
Phone	7454151204
Mobile	
Priority	☆☆☆
Tags	

At the bottom, there are tabs for 'Internal Notes' and 'Extra Info'.

Follow the same process and just click on Lost to mark the deal as lost.

IN order to check out in odoo, apply filter of lost in CRM->Leads

The screenshot shows the Odoo CRM interface with the same layout as the previous one. The main header now indicates 'Leads / Firm1 deal(lost!!!!)'. The 'Mark as Lost' button is now highlighted. The main content area displays the details for 'Firm1 deal(lost!!!!)', which is marked as 'Lost' with a red badge. The details are organized into two columns:

Field	Value
Customer	Girme
Pipedrive Deals ID	181
Company Name	Firm1
Address	Kharadi Bypass Road, Raghoba Patil Nagar, Thite Nagar, Wadgaon Sheri, Pune, Maharashtra, India
Website	
Salesperson	Administrator
Sales Team	Sales
Contact Name	member1
Email	member@gmail.com
Job Position	
Phone	7454151204
Mobile	
Priority	☆☆☆
Tags	

At the bottom, there are tabs for 'Internal Notes' and 'Extra Info'.

EXPORTING FROM ODOO TO PIPEDRIVE

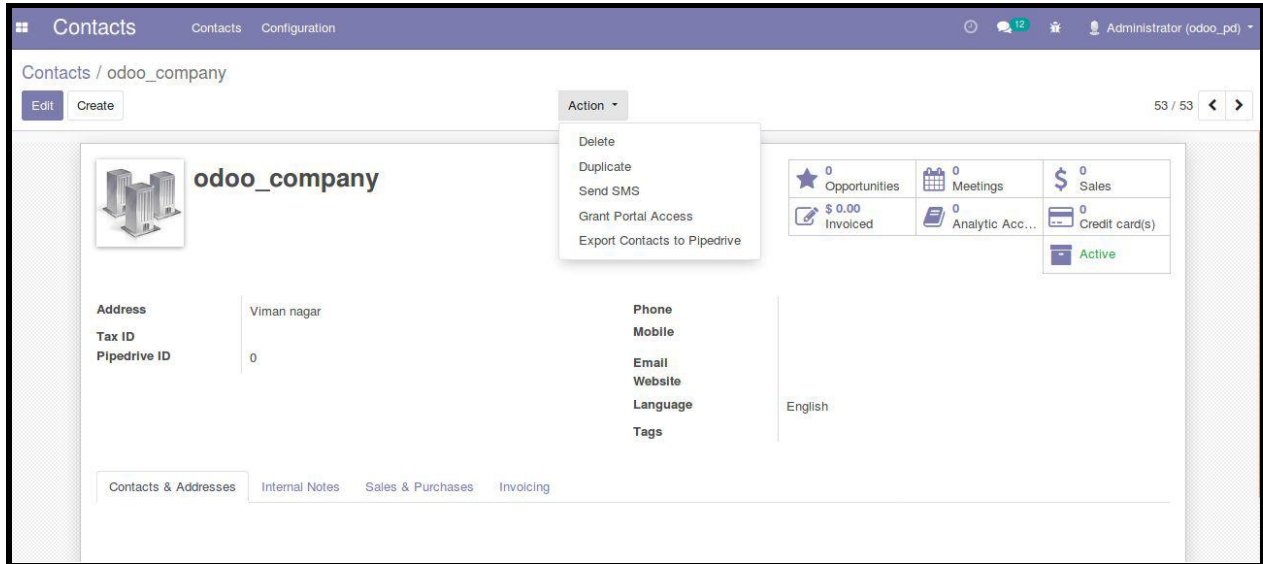
1)Exporting Organization

Firstly,create a company in odoo.

Fill in the details and click on Save.

The screenshot shows the Odoo Contacts form for a company named 'odoo_company'. The form is titled 'Contacts / odoo_company' and includes an 'Edit' button and a 'Create' button. The company name 'odoo_company' is displayed with a building icon. The form is divided into several sections: 'Address' (Viman nagar), 'Tax ID' (0), 'Pipedrive ID' (0), 'Phone' (empty), 'Mobile' (empty), 'Email' (empty), 'Website' (empty), 'Language' (English), and 'Tags' (empty). On the right side, there are summary statistics: 0 Opportunities, 0 Meetings, 0 Sales, 0 Invoiced (\$ 0.00), 0 Analytic Acc..., and 0 Credit card(s). Below these statistics is a green 'Active' status indicator. At the bottom, there are tabs for 'Contacts & Addresses', 'Internal Notes', 'Sales & Purchases', and 'Invoicing'.

To export ,click on Export Contacts to Pipedrive



Go to pipedrive->Organisations and u will find the organization of odoo being displayed.

Name	Label	Address	People	Closed deals	Open deals	Next activity ...	Owner
<input type="checkbox"/> pipedrive_org		Viman Nagar Chowk, Clover Par...	1	0	1		Alfiya
<input type="checkbox"/> Firm1		Kharadi Bypass Road, Raghoba ...	1	2	0	3 May 2019	Alfiya
<input type="checkbox"/> odoo_company			0	0	0		Alfiya

2]To export contacts,

select company type :individual

And follow the same process as above.

Sales->Products->Product Variants

The screenshot shows the Odoo Product Variant form for 'odoo_prod'. The top navigation bar includes 'Sales', 'Orders', 'To Invoice', 'Products', 'Reporting', and 'Configuration'. The breadcrumb trail is 'Product Variants / [999] odoo_prod'. The form has tabs for 'General Information', 'Sales', 'Purchase', 'Inventory', and 'Pipedrive Products Information'. The 'General Information' tab is active, showing fields for 'Product Type' (Consumable), 'Pipedrive Product ID' (0), 'Internal Reference' (999), 'Barcode', and 'Product Category' (All). The 'Sales' tab shows 'Sales Price' (\$120.00), 'Customer Taxes' (Tax 15.00%), and 'Cost' (\$250.00). The 'Purchase' tab shows '0.00 Unit(s) Sold' and 'Product Moves'. The 'Inventory' tab shows 'Active'. The 'Pipedrive Products Information' tab is also visible. The form includes buttons for 'Edit', 'Create', 'Print', and 'Action'. The 'Action' dropdown menu is open, showing options: 'Delete', 'Duplicate', and 'Export Products to Pipedrive'.

In pipedrive

The screenshot shows the Pipedrive Products list. The top navigation bar includes 'p', 'Search', 'Deals', 'Mail', 'Activities', 'Contacts', 'Products', and 'Progress'. The 'Products' tab is active, showing a list of 2 products. The list has columns for 'Name', 'Product code', and an empty column. The products are 'Pipedrive_product' with product code '111' and 'odoo_prod' with product code '123'. The 'Add product' button is visible at the top left. The user 'Alfiya' is logged in.

Name	Product code	
Pipedrive_product	111	
odoo_prod	123	

4)Export deals

Create a deal in odoo as well as schedule activities for that deal.

CRM Sales Leads Reporting Configuration

Pipeline / odoo_deal

Edit Create Action

New Quotation Mark Won Mark Lost New Contact Made Qualified Needs Defined Proposition Won

odoo_deal
\$2,500.00 at 70 %

Meeting 0 Quotation(s) 0

Customer: testperson_1 Expected Closing: 05/30/2019

Email: person@gmail.com

Phone:

Salesperson: Administrator Priority: ☆☆☆

Sales Team: Sales Tags:

Internal Notes Followup

Activities associated with above deal

Send message Log note Schedule activity 0 Follow 0

Planned activities

Due in 18 days. "Deal is been confirmed" for Administrator

This activity and an associated deal need to be exported to pipedrive.

✓ Mark Done ✎ Edit ✕ Cancel

Click on action->Export Deals to pipedrive.

Note:When u click on Export Deals to pipedrive,it will automatically export the activities as well attached to the deal

p Search Deals Mail Activities 26 Contacts Products Progress GOLD 9 trial days left ? Bell User

US\$4,067 · US\$3,214.80 · 4 deals Alfia

<input type="checkbox"/>	Title	Value	Organisation	Contact person	Expected clo...	Next activity ...	Owner	
<input type="checkbox"/>	pipedrive_org deal	\$120	pipedrive_org	pipedrive_person	31 May 2019		Alfiya	
<input type="checkbox"/>	Firm1 deal	\$1,400	Firm1	member1	2 Jun 2019	3 May 2019	Alfiya	
<input type="checkbox"/>	Firm1 deal(lost!!!!)	\$47	Firm1	member1	27 May 2019		Alfiya	
<input type="checkbox"/>	odoo_deal	\$2,500		testperson_1		21 May 2019	Alfiya	

Activities associated with the deal

\$2,500 Add products testperson_1

0 days 0 days 0 days 0 days

Needs Defined 70% Set expected close date

IMPORTANT FIELDS GOLD

A simple way to improve your data quality. Set deal fields as important to remind your team to fill in crucial information.

[Set up](#) [Dismiss](#)

DETAILS [Customise fields](#)

What else do you know about the deal?

[Add details](#)

ORGANISATION

[Take notes](#) [Add activity](#) [Propose times](#) [Send email](#) [Upload files](#) [Create invoice](#)

[Click here to take notes...](#)

PLANNED

Deal is been confirmed

21 May · Alfiya testperson_1

This activity and an associated deal need to be exported to pipedrive.

PAST

[ALL](#) [ACTIVITIES](#) [NOTES](#) [EMAILS](#) [INVOICES](#) [FILES](#) [CHANGELOG](#)

If you mark a particular deal as lost/won, it gets updated in pipedrive as well.

CRM Sales Leads Reporting Configuration

Pipeline / odoo_deal

[Edit](#) [Create](#) [Action](#)

[New Quotation](#) [Mark Lost](#) [New](#) [Contact Made](#) [Qualified](#) [Needs Defined](#) [Proposition](#) [Won](#)

odoo_deal Won

\$ 2,500.00 at 100 %

Customer testperson_1 **Expected Closing** 05/30/2019

Email person@gmail.com

Phone

Salesperson Administrator **Priority** ☆☆☆

Sales Team Sales **Tags**

Internal Notes Followup

IN pipedrive

p

Search

Deals

Mail

Activities26

Contacts

Products

Progress

GOLD9 trial days left

?

+

+

+

Add deal

US\$4,067 · 4US\$3,964.80 · 4 deals

Alfiya

	Title	Value	Organisation	Contact person	Expected clo...	Next activity ...	Owner	
<input type="checkbox"/>	pipedrive_org deal	\$120	pipedrive_org	pipedrive_person	31 May 2019		Alfiya	
<input type="checkbox"/>	Firm1 deal	\$1,400	Firm1	member1	2 Jun 2019	3 May 2019	Alfiya	
<input type="checkbox"/>	Firm1 deal(lost!!!!)	\$47	Firm1	member1	27 May 2019		Alfiya	
<input type="checkbox"/>	odoo_deal	\$2,500		testperson_1		21 May 2019	Alfiya	