**insertRecords Method**

**Request URL**

**XML Format:**

[https://crm.zoho.com/crm/private/xml/Potentials/insertRecords?authtoken=AuthToken&scope=crmapi&xmlData=Your XML Data](https://crm.zoho.com/crm/private/xml/Potentials/insertRecords?authtoken=AuthToken&scope=crmapi&xmlData=Your%20XML%20Data )

**Request Parameters**

|  |  |  |  |
| --- | --- | --- | --- |
| **Parameter** | **Data Type** | **Description** | **Value** |
| authtoken\* | String | Encrypted alphanumeric string to authenticate your Zoho credentials. | 1c70fd4d9d86a500197979bc5d96610b |
| scope\* | String | Specify scope as **crmapi** | crmapi |
| xmlData\* | XML | This is an XML string and the format should be same as of getRecords in XML format of fetched records. | As per the spec – Potentials field names and types in table below. |
| wfTrigger | Boolean | Set value as **true** to trigger the workflow rule while inserting record into CRM account. By default, this parameter is **false**. | Set to true – this will then generate email to potential |
| duplicateCheck | Integer | Set value as **"1"** to check the duplicate records and throw an error response or "**2**" to check the duplicate records, if exists, update the same. | Set to 2 – we do not need to do duplicate check |
| isApproval | Boolean | By default, records are inserted directly . To keep the records in approval mode, set value as **true**. You can use this parameters for Leads, Contacts, and Cases module. |  |
| newFormat | Integer | **newFormat=1**: To exclude fields with "null" values while inserting data from your CRM account. **newFormat=2**: To include fields with "null" values while inserting data from your CRM account. |  |
| version | Integer | **version = 1:** (Default Value) This will fetch responses based on the earlier API implementation i.e prior to the enhancements made. **version = 2:** This will fetch responses based on the latest API implementation. **version = 4:**This will trigger duplicate check functionality for multiple records. |  |

Update form information to Zoho. Form data will be used to create a new “Potential” in Zoho with the following attributes:

|  |  |
| --- | --- |
| Zoho Field – Potential | Source |
| Potential Owner | Default to Administrator Marketlend |
| Email 1 | Email entered in web form |
| Member Source | Default to “Landing Page” |
| First Name / Company Name | Name entered in web form |
| Phone 1 | Phone Number entered in web form |
| Closing Date | Default to Today’s date + 3 days |
| Stage | Default to “Qualification” |
| Web Page | Use the value from the landing page url that appears after marketplacelend/ |

|  |  |  |
| --- | --- | --- |
| **Field** | **Data Type** | **Custom Field** |
| Amount | Currency |  |
| Borrower Name | Lookup |  |
| Campaign Source | Lookup |  |
| Closing Date | Date |  |
| Created By | Single Line |  |
| Created Time | DateTime |  |
| Description | Multi Line (Large) |  |
| Email 1 | Email | Y |
| Expected Revenue | Currency |  |
| First Name/Company Name | Single Line | Y |
| Last Activity Time | DateTime |  |
| Last Name/ACN | Single Line | Y |
| Lender Name | Lookup |  |
| Member Conversion Time | Number |  |
| Member Source | Pick List |  |
| Modified By | Single Line |  |
| Modified Time | DateTime |  |
| Next Step | Single Line |  |
| Overall Sales Duration | Number |  |
| Phone 1 | Phone |  |
| Potential Name | Single Line |  |
| Potential Owner | Lookup |  |
| Probability (%) | Number |  |
| Sales Cycle Duration | Number |  |
| Stage | Pick List |  |
| Status | Pick List | Y |
| Type | Pick List |  |
| Web Page | Pick List |  |

https://crm.zoho.com/crm/images/spacer.gif