

CloudPerfect Sync V2 Documentation

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Overview

CP connect allows CloudPerfect to seamlessly migrate the data from your Xero account to Zoho. Resulting in a stress-free experience.

Getting started with CP Sync

Step One

Reach out to one of our helpful team members and let us know that you would like to integrate your Xero account with your zoho account.

Step Two

We will send you an email containing 2 links:

- The first link allows us access to your xero account.
- The second link allows us access to your Zoho account.

Simply click each link. A new page will load and then click the button allow access.



CloudPerfect Sync v2
wants access to:

Organisation data



CloudPerfect

View and manage your:

- Organisation settings
- Attachments
- Business transactions
- Contacts

View your:

- Reports
- General ledger

User account information



Simon Brusch

View your name, email, and user profile.

By allowing access, you agree to the transfer of your data between Xero and this application in accordance with Xero's [Terms of use](#) and the application provider's terms of use and privacy policy.

You can disconnect at any time by going to [Connected apps](#) in your Xero settings.

Allow access

Cancel

What information you need to supply us:

- Zoho Login
- Xero Login

Creating a clickable link from Zoho to Xero

- This will allow you to create a button that when clicked opens a new page with your xero account loaded.
 1. In Zoho:
 2. Goto Settings -> Preferences -> Contacts -> Custom Button
 3. Click Create '+ New Custom Button'
 4. Give it a name 'Xero Link'
 5. Replace the demo function with the following code snippet:

```
xerold = customer.get("cf_xero_acct_id");  
openUrl("https://go.xero.com/Contacts/View/" + xerold,"new window");  
resultMap = Map();  
return resultMap;
```

Creating a clickable link from Xero to Zoho

- This will allow you to create a button that when clicked opens a new page with your Zoho account loaded.
 1. Goto Settings -> Preferences -> Contacts -> Custom Button
 2. Click Create '+ New Custom Button'
 3. Give it a name 'Xero Link'
 4. Replace the demo function with the following code snippet:
 5. `xerold = customer.get("cf_xero_acct_id");`
 6. `openUrl("https://go.xero.com/Contacts/View/" + xerold,"new window");`
 7. `resultMap = Map();`
 8. `return resultMap;`
- Alternatively we can set either of the buttons listed above for you.

Frequently asked questions:

Question: Does the integration work with Zoho inventory?

Answer: Yes, it works with all of the individual Zoho financial products as well as the CRM.

Question: Can I migrate custom form fields.

Answer: Yes.

Question: Am I able to set the tracking fields in Xero according to values in Zoho?

Answer: Yes

Question: Do you need products in Xero in order to sync with Zoho?

Answer: No, we can sync the description.

Question: Do you provide training?

Answer: Yes we provide training all your accounts staff.