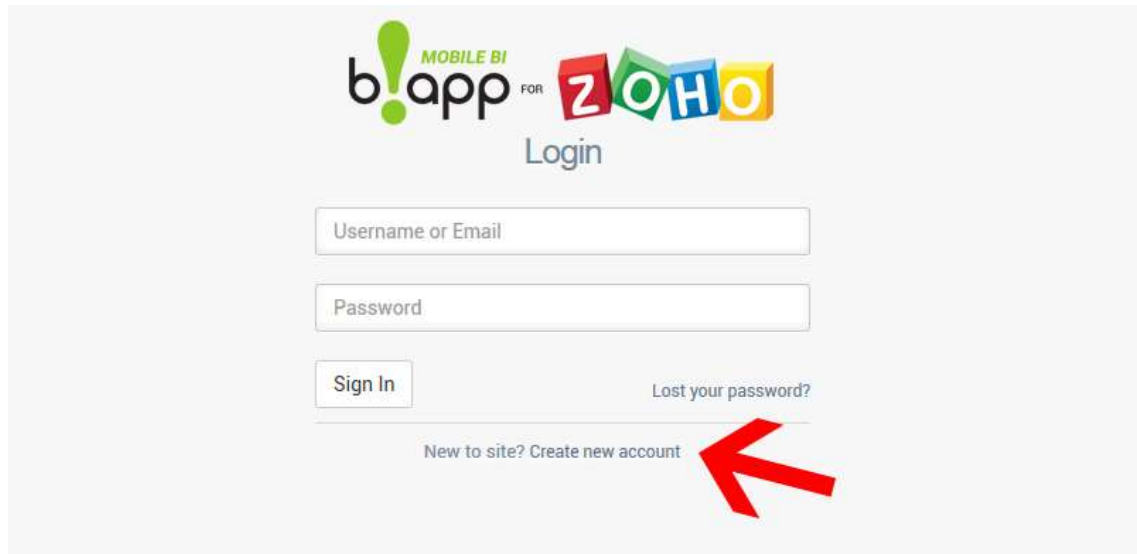


BI APP FOR ZOHO CRM USERGUIDE

CREATE BI APP FOR ZOHO ACCOUNT

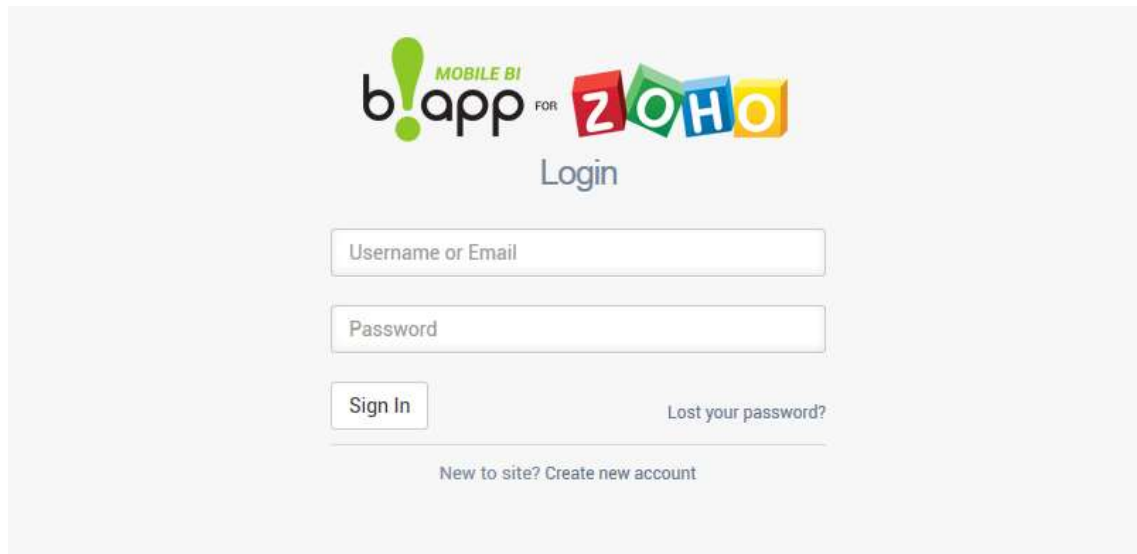
- Go to login.biapp.com and click "create new account" under the form to create your account.



- Fill the fields and click on "Register".
- You are now registered and ready to sign in.

SIGN IN

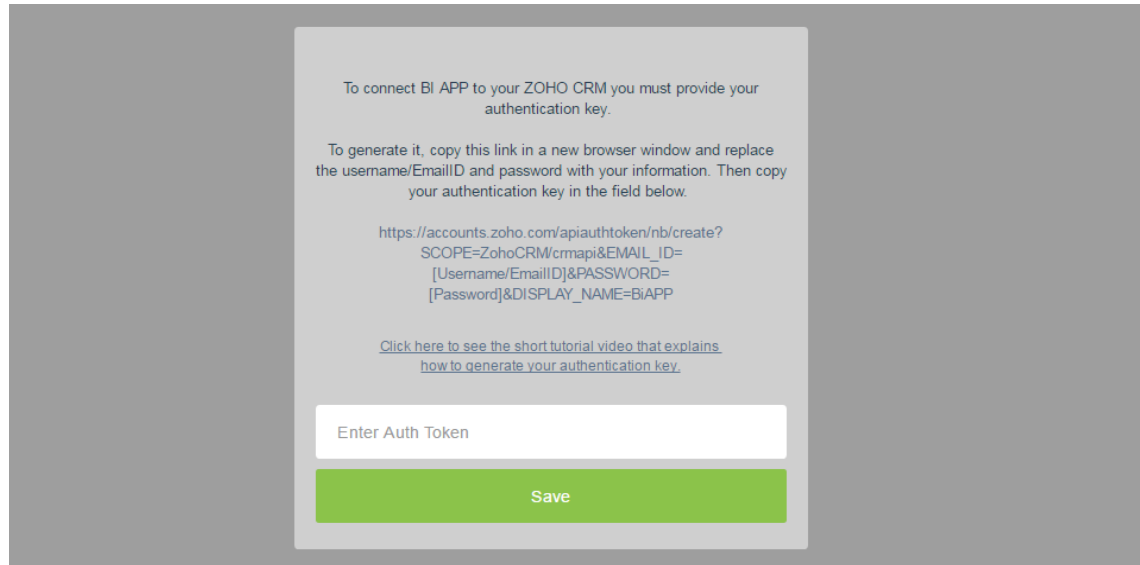
- From the login.biapp.com page, enter your username and password, then click on "Sign in".



CONNECT BI APP TO YOUR ZOHO CRM

GET YOUR AUTHENTICATION KEY

- After you signed in, you will have to generate your authentication key to activate your BI APP for ZOHO software.
- You will find the information and also a link to a video that explains you how to generate your authentication key.



The screenshot shows a web interface for generating an authentication key. It contains the following text:

To connect BI APP to your Zoho CRM you must provide your authentication key.

To generate it, copy this link in a new browser window and replace the username/EmailID and password with your information. Then copy your authentication key in the field below.

[https://accounts.zoho.com/apiauthtoken/nb/create?SCOPE=ZohoCRM/crmapi&EMAIL_ID=\[Username/EmailID\]&PASSWORD=\[Password\]&DISPLAY_NAME=BiAPP](https://accounts.zoho.com/apiauthtoken/nb/create?SCOPE=ZohoCRM/crmapi&EMAIL_ID=[Username/EmailID]&PASSWORD=[Password]&DISPLAY_NAME=BiAPP)

[Click here to see the short tutorial video that explains how to generate your authentication key.](#)

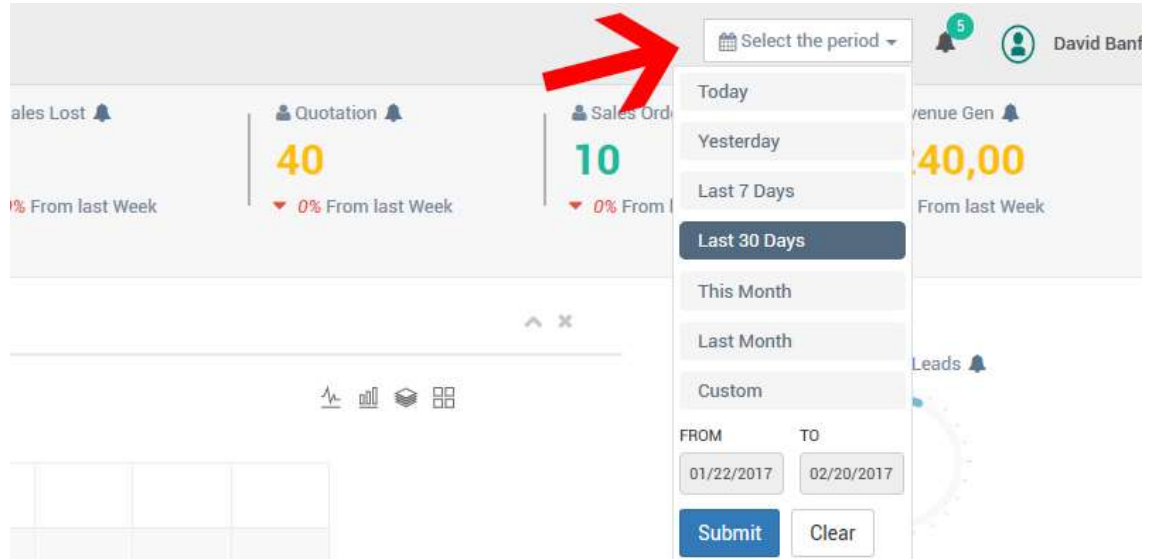
Below the text is a white input field with the placeholder text "Enter Auth Token" and a green "Save" button.

- As the text information indicates it, you have to copy the displayed link and paste it into a new browser window.
- In the address bar, replace the username/EmailID and password with your own username and password. Then click "enter".
- Your authentication key has been generated and is displayed on the screen. Copy it, get back to your BI APP for ZOHOM software and paste your authentication key into the "Enter Auth Token" field. Then click "Save".

DASHBOARD SETTINGS

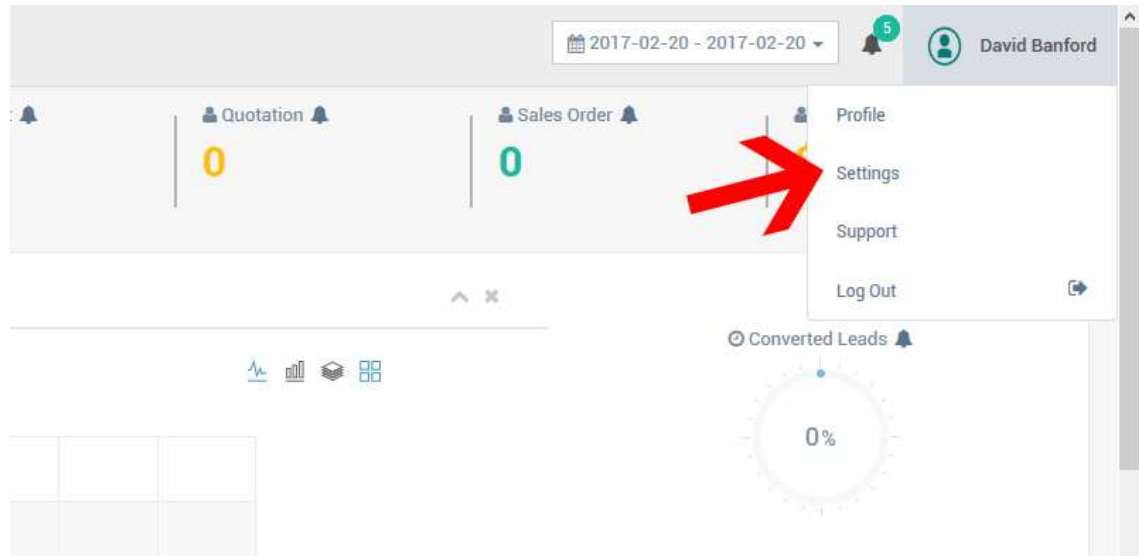
PERIOD TO DISPLAY

- You can display your business data for any period you want by clicking on the 'select period' menu at the top of the window.

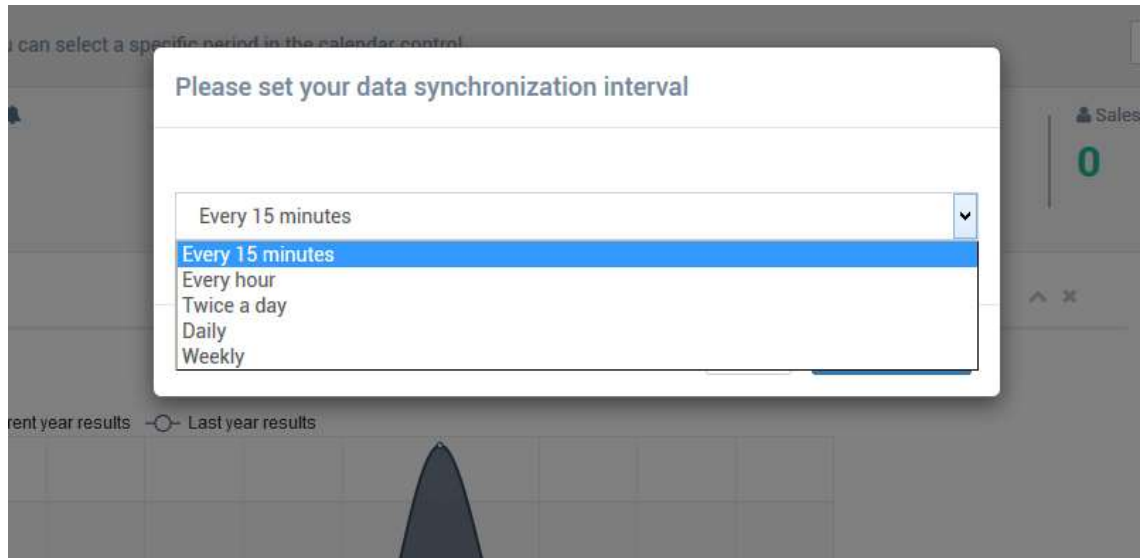


DATA SYNCHRONIZATION INTERVAL

- You can set the data synchronization interval by clicking on your 'Profile' at the top of the window, then 'Settings'.

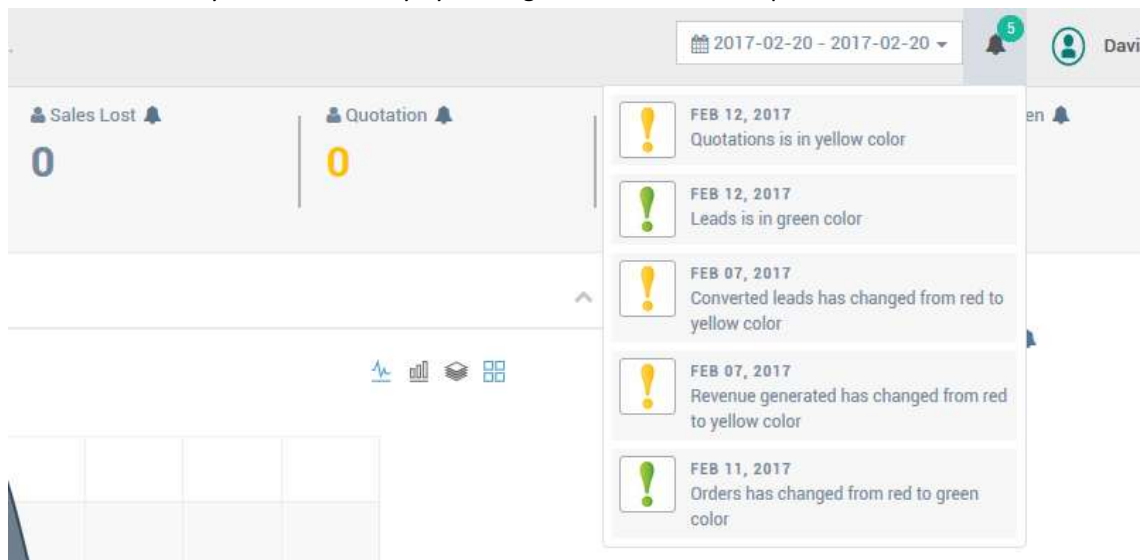


- The data synchronization interval window appears, so you can make your selection.



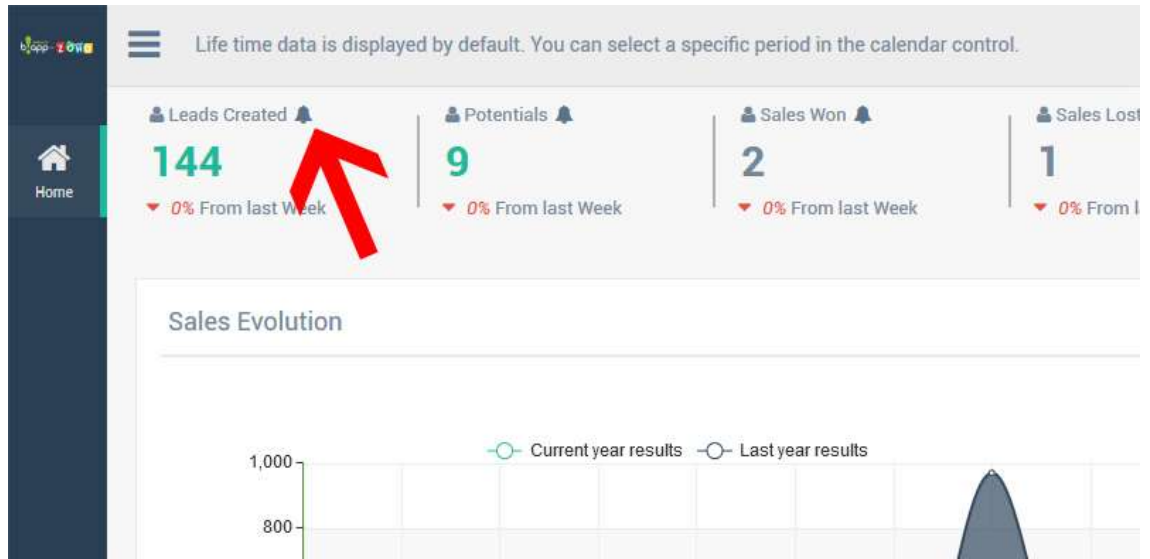
ALERTS

- You can find all of your alerts history by clicking on the bell, at the top of the window.

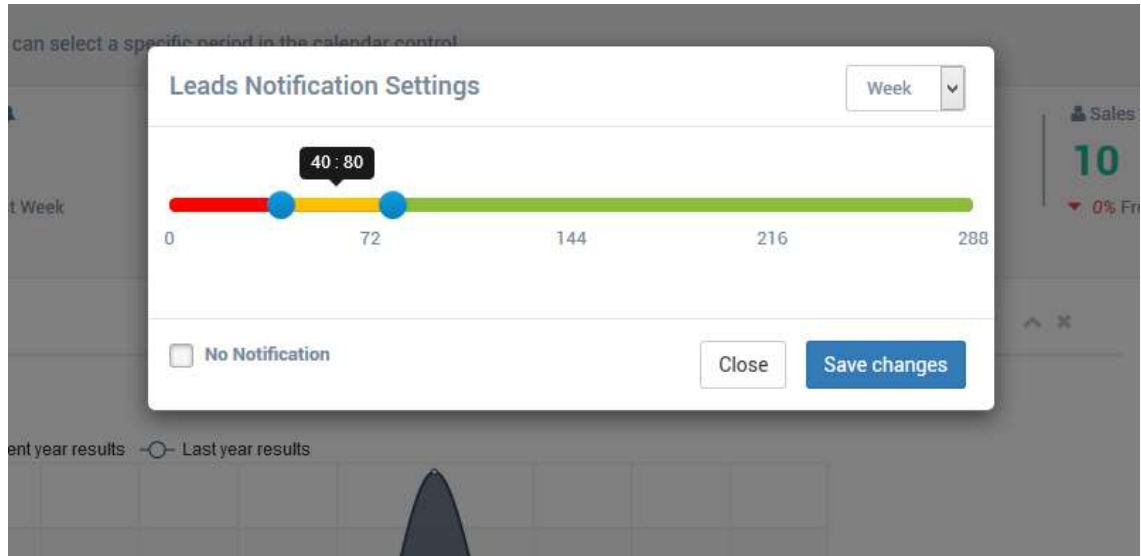


SET YOUR ALERT LEVELS

- You can set the alert level of an indicator when you see a bell icon at the top of it



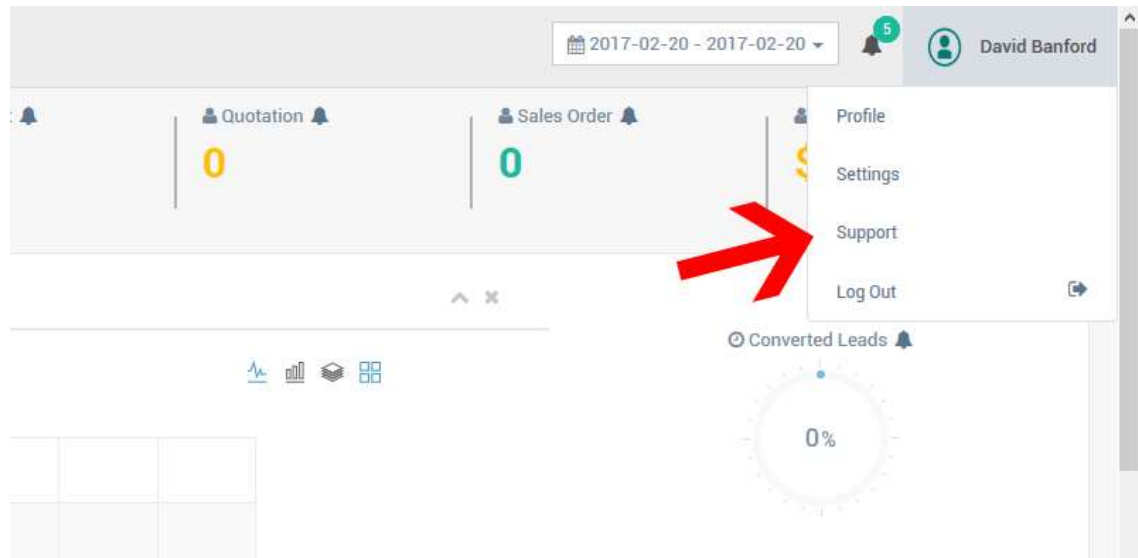
- To set the level alert, click on the bell icon and the settings window will appear. Use the slider to adjust.



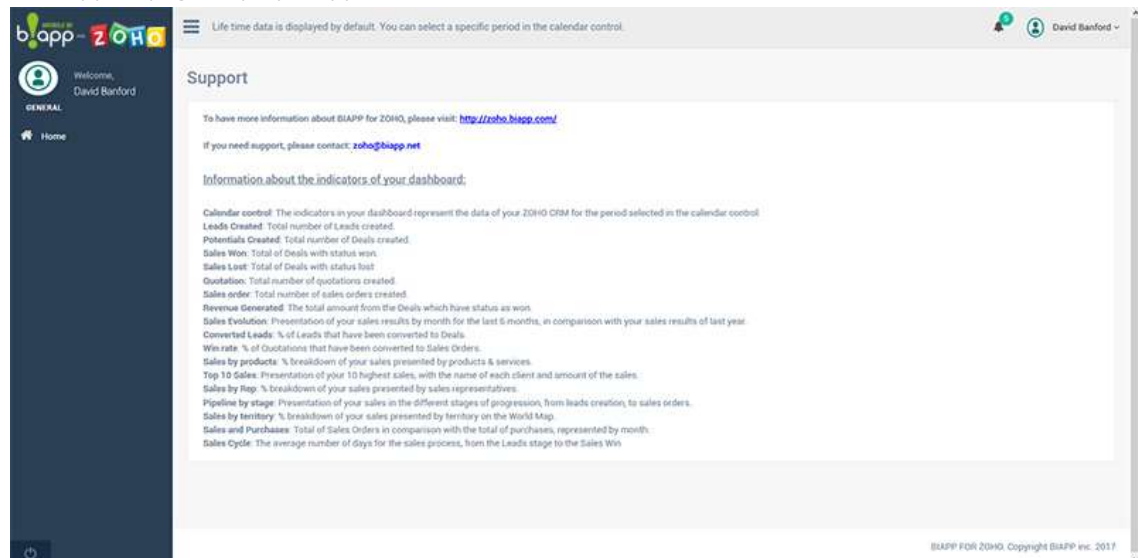
- As soon as a result goes in a new color, you will receive an alert on your mobile phone.

SUPPORT

- You can access to support information by clicking on your 'Profile name', then 'Support'.



- The support page displays support link and word references.



We hope you will enjoy your experience with BAPP.

If you need additional support, please contact: zoho@biapp.net