## How to set up a one-click button for sending a pitch from ZohoCRM?

- 1. Login to your PitchLink account. On the navigation bar select Integrations -> ZohoCRM.
- 2. Copy the link given by clicking on it.

Pitch.L	ink <sub>sea</sub> > intergrations > zohoerm	
2	CRM	This fink in only for you to be used with your ZohoCRM account to even pitch to your leads with one click. Please do not clause this link with any one. Any entity having access to table link can gain aneshhorized access to your PRENLINK access.
You	ur unique link for setting up one click send pitch button within ZohoCRM	() ()
h	ttps://pitchcloud.pitch.link/users/verify?c=5kUGwOjWIruYXM%28dHpz17iHg%2Frfl8NCAvhTTUCoT8K8kJLRiiEWhcLN5jEGhY823XZLITVcuRypEXd	11acoly9NAO&d=ezXcurFKDZIVFI4fjlhJ1AZgpcHh9ltuy1xi4epeFKUkJDKLYldl
×	How to setup a one click button for sending pitch from ZohoCRM?	Ŷ
1	Login to your ZohoCRM account.	Click here to copy the link
2	Click on "Leads" on top toolbar.	
3	Click on any lead.	
4	Cick on the "Menu" button and cick on "Create Button" from the menu.	
5	In the newly opened tab, give a name to your button. For example, "Send Pitch".	
6	In the description box, you can leave it empty or write a description for the purpose of this button.	
7	In the next dropdown, make sure "View Page" is selected.	
8	In the next dropdown, select "Invoke a URL" under "Custom Actions".	

- 3. Log in to your ZohoCRM account.
- 4. Click on "Leads" on the top toolbar.
- 5. Click on any lead.
- 6. Click on the "Menu" button and click on "Create Button" from the menu.

≡ Home Leads Conta	acts	Accounts	Deals	Activities	Reports	Analytics	Products	Quotes	Sales Orders	Purchase Order	s Invoices	Projects ••	••				Ent	erprise   Q	Δ	+ E	2	
Info													S	end Email	Convert	t Edi	it 🔤	Send PitchLink	×		> <	>
Timeline Last Update : 7 day(s) ago	10	← ()	Ms.	Fresa S	Sweely	(Sampl	le) - Morio	ng Associa	ates							-	-	Share				
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Notes		Le	ad Owner	pg p	g													Print Preview	1			- 1
Attachments			Emai	tres	a-sweely@ł	otmail.com												Find and Me Mail Merge	rge Dupl	licates		- 1
Open Activities			Phone	65	55-555-55	55												Meet Now!				- 1
Closed Activities			Mobile	65	55-555-55	55												Schedule Or	line Mee	eting		- 1
Invited Events		L	ead Status	Con	tacted													Run Macro				
Emails		SHOW	DETAILS V															Customize B	usiness	Card		
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Unvest Cress	4	Here is your S	mart Chat (Ctr	(+Space)														Ask Zia	æ	C) 2¢	0	Θ

- 7. In the newly opened tab, give a name to your button. E.g. "Send Pitch".
- 8. In the description box, you can leave it empty or write a description for the purpose of this button.

- 9. In the next dropdown, make sure "View Page" is selected.
- 10. In the next dropdown, select "Invoke a URL" under "Custom Actions

≡ Home Leads Contac	ts Accounts Deals Activities Reports Analytics Products Quotes Sales Orders Purchase Orders Invoices Projects ***	Enterprise   Q 🗘 + 🖻 🐒 🎑
	2 Leads	
Leads		
Contacts	Layouts Layout Rules Validation Rules Fields Links and Buttons Summary	
Accounts		
Deals	Create Your Button	Help
Products	What would you like to name the button?	
Quotes	Send Pitch Enter a name for the button	
Sales Orders	Description:	
Purchase Orders		
Invoices		
Campaigns	Where would are the stars the bulk of	
Vendors	View Page ~ Lensure "View Page" is selected	
Price Books		
Cases	What action would you like the button to perform?	
Solutions	Select "Invoke a UKL" from this dropdown	
Tasks	Construct Your URL	
Events	URL Fields: None +	
Calls		
Chantels	Here is your Smart Chat (Cirl+Space)	Ask Zia 🕞 🖸 Zá 🔯 🖸

- 11. Paste the copied URL in step 2 into the "Construct Your URL" box.
- 12. In the next dropdown, ensure "New Tab" is selected

≡ Home Le	ads Contacts	Accounts Deals Activities Reports Analytics Products Quotes Sales Orders Purchase Orders Invoices Proje	cts *** Enterpri	8e   Q	۵ -		* 🙃
← MODULES	Q	Where would you like to place the button?					
Contacts Accounts		What action would you like the button to perform? Invoke a URL *					
Deals Products		Construct Your URL					
Quotes		URL Fields None -					
Sales Orders	ders	ntps://jtotcheouou.jtotcn.im/cusers/ventry/ e=RCtus/phinhi2Pk3/u7/sk1/hmp03McOSeCGgv2zPHEBI8KJEu/JdIERgNiaBsyyUPjKZMSNiAmi2R%2FeLcAJwAfcxCu&d =86ggMRW/tbWPjmCEwT219SLe6ywQ/V5%2FcW15DrJQAckJGISWoP%2BkdHRYKn0iRt126AOK(NyEJ8F5qWF2qJbAk%	Enter your unique link h	iere			
Invoices		2BFI9QF57KDh3tbj2PkQw%2FjQsDldtf74b%2F7GsOErn52k%3D&redirect~/pitches/zoholanding/%3Fsendto=\$[Leads.C ompany]%26fname=\$[Leads.First Name]%26iname=\$[Leads.Last Name]%26email=\$[Leads.Email] 4					
Campaigns		Eg http://www.google.com/search?q=\$(Leads.Company) URL Encoding: UTF-8 (Unicode) *					
Vendors Price Books		Where do you want to show the content of the button action? New Tab - Ensure this is selected as "New Tab"					
Cases		Which profile(s) should see this button?					
Solutions Tasks		Administrator ×					
Events		Cancel Save Click "Save" to save the button					
Calls	£ 🔺	Here is your Smart Chat (Chit-Space)		Ask Zia	cə (	2 Zás	10 0

- 13. Select the profiles to whom you want the button to be available.
- 14. Click on "" to save the button.
- 15. Close this tab/window and reload the previous tab/window to view the button.