

# Integration Companyweb - Zoho CRM

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# 1 Installation Companyweb in Zoho CRM

You have to be a (super) admin user to install the Companyweb application.

## 1.1 Download the Companyweb app on the Zoho Marketplace

Go to the Zoho Marketplace and search for 'Companyweb':

<https://marketplace.zoho.com/home>

Click on 'install' and the app will be installed.

The app can be downloaded for all Zoho licences:

Standard – Professional – Enterprise – Ultimate.

### 1.1.1 Activating and configuring the integration

After installing the Companyweb application, you need to enter the login data you received from Companyweb.

Via Settings  you go to Marketplace – All – Companyweb.

MARKETPLACE

All

Zoho

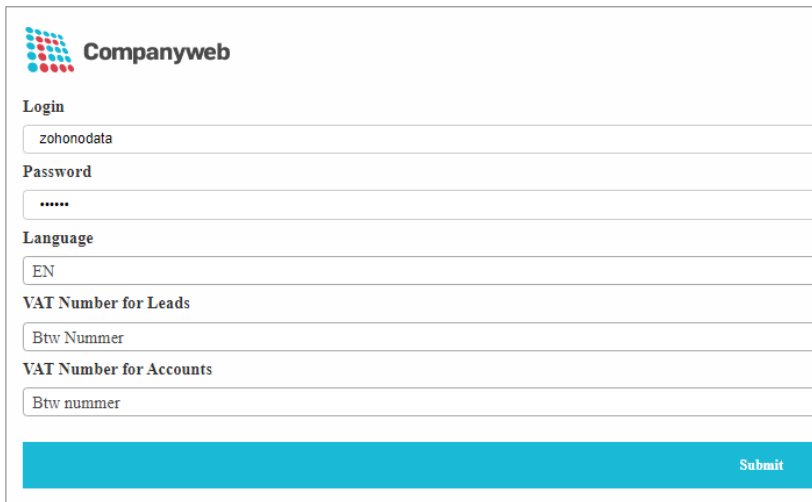
Google


Microsoft

The login and password are automatically saved.

Via Settings, you can determine the language in which you want to receive the Companyweb data.

Also set up the VAT number fields here. If these fields do not yet exist in your CRM, create them as custom fields in the modules Lead and Account.



 **Companyweb**

Login  
zohonodata

Password  
.....

Language  
EN

VAT Number for Leads  
Btw Nummer

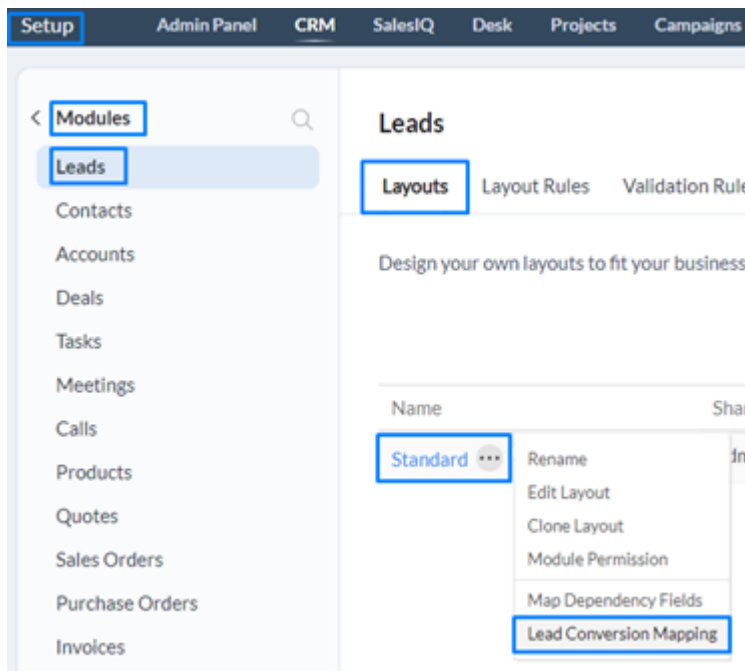
VAT Number for Accounts  
Btw nummer

Submit

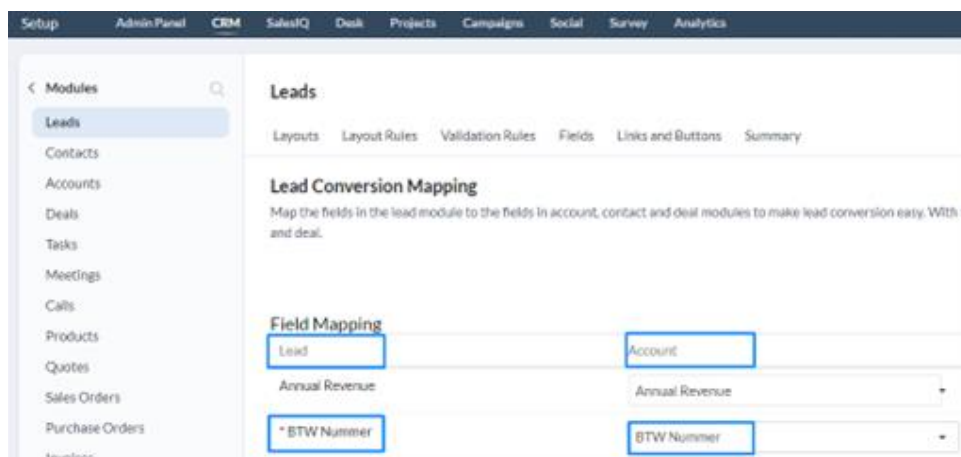
## 1.1.2 Mapping VAT number from Lead to Account

When converting Leads to Accounts, you can automatically copy the VAT number. This must be set in the Lead Conversion Mapping. By doing so, the Companyweb data will also be copied from the Lead to the Account sheet.

1. Go to: Setup Customization – Modules and Fields – Leads – Layouts – Standard (...) – Lead Conversion Mapping



2. Field mapping: Find the field with the VAT number in the first column Lead. Then indicate in the Account column to which field this value should be copied.



3. Save these settings!



## 1.2 User manual

Companyweb is now visible in your Zoho CRM environment in the Lead and Account sheets:

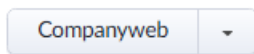
- Related list

### ◀ Related List

Notes

Companyweb

- Top right (dropdown) under Settings



When creating a new Lead/Account or viewing an existing Lead/Account, you can retrieve data from Companyweb by using a VAT number:



Btw Nummer —  
Company Company  
Lead Name A

If the VAT number is not filled in, Companyweb data cannot be retrieved.

Result for a valid VAT number via the related list:

Companyweb


Last update: 12 Jul 2022 10:18:35 GMT+0200

GENERAL		HEALTH BAROMETER		FINANCIAL YEAR 2021	
NAME				EMPLOYEES (FTE)	77.2
LEGAL FORM	SA			EQUITY	€ 6 154 840
PREFERRED LANGUAGES	Dutch			TURNOVER	€ 13 770 239
VAT NUMBER				GROSS MARGIN	€ 5 567 458
SUBJECT TO VAT	YES			PROFIT/LOSS	€ 463 104.78
STATUS	Active				
ESTABLISHED	1982/11/10				
ADDRESS		CREDIT LIMIT		MORE INFORMATION	
STREET, HOUSENUMBER		CREDIT LIMIT	€ 1 198 000.00	DETAIL LINK	<a href="#">Open</a>
POSTALCODE, CITY	9400, Ninove	PAYMENT EXPERIENCE		COMMERCIAL REPORT	<a href="#">Open</a>
COUNTRYCODE	BE	WARNINGS			
<a href="#">Copy to CRM</a>		<p>• Customer credit levels falling, supplier credit levels rising (*2021)</p> <a href="#">Details</a>			

Data that will be retrieved, if they are available:

- Name, legal form, preferred language, subject to VAT
- Status
- Established
- Registered office
- Health barometer, credit limit, payment experience, warnings
- Key figures from the most recent filed annual accounts
- Link to the detail page from Companyweb
- Link to the detailed commercial report

## Result from a valid VAT number via the pop-up:

Companyweb		HEALTH BAROMETER		FINANCIAL YEAR 2018	
<b>GENERAL</b>				EMPLOYEES (FTE) 1,8	
NAME	[REDACTED]			EQUITY € 34 834	
LEGAL FORM	SA			GROSS MARGIN € 88 942	
PREFERRED LANGUAGES	Dutch			PROFIT/LOSS € 10 260	
VAT NUMBER	[REDACTED]				
SUBJECT TO VAT	YES				
STATUS	Opening bankruptcy				
ESTABLISHED	1994/08/10				
END DATE	2021/03/18				
<b>ADDRESS</b>				<b>CREDIT LIMIT</b> € 0,00	
STREET, HOUSENUMBER [REDACTED]		CREDIT LIMIT INFO Activity stopped		DETAIL LINK <a href="#">Open</a>	
POSTALCODE, CITY 3500, Hasselt		• Bankrupt		COMMERCIAL REPORT <a href="#">Open</a>	
COUNTRYCODE BE		• Equity assets < 50% of capital (*2016) (*2017) (*2018)			
<a href="#">Copy to CRM</a>		WARNINGS <a href="#">Details</a>			

## 1.2.1 Extra functions

### 1.2.1.1 Transferring Companyweb address data into the Zoho CRM environment

**ADDRESS**

STREET, HOUSENUMBER	[REDACTED]
POSTALCODE, CITY	3500, Hasselt
COUNTRYCODE	BE


[Copy to CRM](#)    Success

#### Address Information

Street	<input type="text" value="straat 32"/>	City	Hasselt
State	—	Zip Code	3500
Country	BE		

### 1.2.1.2 Payment experience and warnings

The **payment experience** is activated in your subscription when you share the payment experience about your own customers with Companyweb. You will then be able to see the payment behaviour of your Leads and Accounts. For more information, please contact Companyweb: [info@companyweb.be](mailto:info@companyweb.be) or 02/752.17.60.

<b>CREDIT LIMIT</b>	€ 1.198.000,00
<b>PAYMENT EXPERIENCE</b>	 <a href="#">Details</a>
<b>WARNINGS</b>	<ul style="list-style-type: none"> <li>• Customer credit levels falling, supplier credit levels rising (*2021)</li> </ul> <a href="#">Details</a>

**Warnings** are negative signals within the company. For more information, click on [Details](#) to go to the website.

### 1.2.1.3 Link to the Companyweb website and the detailed commercial report

To find out even more details about the company, you can click through to the detail sheet on the Companyweb website or click through directly to the detailed trade report.

#### MORE INFORMATION

DETAIL LINK	<a href="#">Open</a>
COMMERCIAL REPORT	<a href="#">Open</a>