

### Heads up

#### Who is this Cheat sheet for?

This cheat sheet is for Freshsales App developers who have their apps live on Freshsales Marketplace and are planning to make it available simultaneously for Freshworks CRM

### Freshsales Environment

Node Version	10.18
CLI Version	6.0.0

### Freshsales placeholders

Global Navigation Page

Lead Details Page

Contact Details Page

Deal Details Page

Sales Account Details Page

CTI

Chat

### Basic Features - Freshsales

Basic Features

Data Method Global Data APIs

Lead Details Page

Contact Details Page

Deal Details Page

Account Details Page

App Lifecycle Events `App.Initialized()`

`App.Activated()`

`App.Deactivated()`

Events API Lead Details Page Events

Contact Details Page Events

Deal Details Page Events

Sales Account Details Page Events

Interface API *Global Interface APIs*

### Basic Features - Freshsales (cont)

Show Modal

Show Confirm

Show Notifications

Open Create Lead

Open Create Contact

Open Create Account

Open Create Deal

Open Create Call Log

Show Lead

Show Contact

Show Account

Show Deal

### Freshsales - Advanced Features

Data Storage

Request API

Instance API

OAuth

### Freshsales Product Events

OnContactCreate

OnContactUpdate

OnDealCreate

OnDealUpdate

OnLeadCreate

OnLeadUpdate

OnSalesAccountCreate

OnSalesAccountUpdate

OnCustomModuleCreate

OnCustomModuleUpdate

OnAppointmentCreate

OnAppointmentUpdate

OnTaskCreate

OnTaskUpdate

### Freshsales REST APIs

Notes

Tasks

Appointment

Sales Activities

Search

Lookup Search

Phone

Manual Call Log

Files

Links

Create a Link

Create a File

List all Files and Links

Contacts module

Contacts module

Leads

### Freshworks CRM Environment

Node Version	10.18
CLI Version	6.6.0

### Freshworks CRM placeholders

Contact Details Page

Deal Details Page

Sales Account Details Page

### Basic Features - Freshworks CRM

Basic Features

Data Method Global Data APIs

Lead Details Page

Contact Details Page

Deal Details Page

Account Details Page

App Lifecycle Events `App.Initialized()`

`App.Activated()`

`App.Deactivated()`



### Basic Features - Freshworks CRM (cont)

Events ~~Lead Details Page Events~~  
API

Contact Details Page Events

Deal Details Page Events

Sales Account Details Page  
Events

Interface *Global Interface APIs*  
API

Show Modal

Show Confirm

Show Notifications

~~Open Create Lead~~

Open Create Contact

Open Create Account

Open Create Deal

Open Create Call Log

~~Show Lead~~

Show Contact

Show Account

Show Deal

### Freshworks CRM - Advanced Features

Data Storage

Request API

Instance API

OAuth

### Freshworks CRM - Serverless

Product Events `OnContactCreate`

`OnContactUpdate`

`OnDealCreate`

`OnDealUpdate`

~~`OnLeadCreate`~~

~~`OnLeadUpdate`~~

`OnSalesAccountCreate`

`OnSalesAccountUpdate`

`OnCustomModuleUpdate`

### Freshworks CRM - Serverless (cont)

`OnCustomModuleC-`  
`reate`

`OnAppointmentCreate`

`OnAppointmentUpdate`

`OnTaskCreate`

`OnTaskUpdate`

App Setup `OnAppInstall`  
Events

`OnAppUninstall`

External Events

Scheduled Events

Server Method Invocation

### Freshworks CRM REST APIs (copy)

Notes

Tasks

Appointment

Sales Activities

Search

Lookup Search

Phone

Manual Call Log

Files

Links

Create a Link

Create a File

List all Files and Links

Contacts module

Contacts module

~~Leads~~

[Read the detailed REST API documentation](#)

### Early Access Limitations

#### Extending Omni Capabilities for Freshsales developers - Early Access

Hint: Leads module and Entities don't exist in Freshworks CRM directly via dedicated App or REST APIs.

### Early Access Limitations (cont)

Hint: The the URLs used in Freshworks CRM for it's App reference or REST APIs will be different to that of Freshsales. Make sure you check and update those.

CTI, Full Page and Chat app placeholders are not available at the time of Early access.

Broadly, to extend the Omni capabilities - App Manifest, Serverless Events, Installation Parameters, URLs of APIs consumed are most components of your app to make sure.

To extend your Freshsales app with Omni capabilities, your app must use same product events supported by both Freshworks CRM and Freshsales

<PENDING: PRODUCT EVENT IMPLEMENTATION INFO>

For your app to extend Omni Capabilities, **iparams.json** doesn't not support the input field types **domain** and **api\_key**. Developers are expected to use `iparams.html > data-bind` with input field type: **text**.

Data API's `client.data.get("domainName")` will give you `sample.freshsalesforFreshsales` and `sample.myfreshworkork s.com` for Freshworks CRM'

### Testing your App - Early Access Limitations

When app is run locally via CLI, you can `test/run` the app on a trial account of the Product (object) which ever comes first in `manifest.json>product{ }`. To test in both freshsales and FCRM, developer needs to switch the order.

When app is run locally via CLI, you can `test/run` the app on a trial account of the Product (object) which ever comes first in `manifest.json -> product{ }`. To test in both freshsales and FCRM, developer needs to switch the order.



### App publishing - Early Access Limitations

Your Freshsales public app's extension ID needs to be shared with us in prior by emailing to [marketplace@freshworks.com](mailto:marketplace@freshworks.com).

In App submission portal, your existing Freshsales App will accept next version with Omni capabilities.

You can now upload your app with Omni capabilities and submit it.

If you are Freshsales App developer adding Omni capabilities to support Freshworks CRM, you can email our team and in parallel can work on changes to support Omni capabilities.



By **Saif\_Shines**  
[cheatography.com/saif-shines/](https://cheatography.com/saif-shines/)

Not published yet.  
Last updated 7th July, 2020.  
Page 3 of 3.

Sponsored by **Readable.com**  
Measure your website readability!  
<https://readable.com>