

### 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()`



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### Basic Features - Freshworks CRM (cont)

Events API	Lead Details Page Events
	Contact Details Page Events
	Deal Details Page Events
	Sales Account Details Page Events
Interface API	Global Interface APIs
	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)

	OnCustomModuleCreate
	OnAppointmentCreate
	OnAppointmentUpdate
	OnTaskCreate
	OnTaskUpdate
App Setup Events	OnAppInstall
	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.

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### 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.



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