

Easysoft ODBC-Zoho CRM Driver User's Guide

This manual documents version 1.0.n of the Easysoft ODBC-Zoho CRM Driver.

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Getting started

This section shows you how to install the Easysoft ODBC-Zoho CRM Driver and configure the ODBC data source that stores the connection details for your Zoho CRM system. You're then ready to work with Zoho CRM data in your application.

- [Installing the Easysoft ODBC-Zoho CRM Driver](#)
- [Connecting to Zoho CRM](#)
- [Logging](#)

Installing the Easysoft ODBC-Zoho CRM Driver

Install the Easysoft ODBC-Zoho CRM Driver on the computer where the application you want to connect to Zoho CRM is running.

Installing on Windows

The Windows installation can be done by anyone with local administrator privileges.

1. [Download the Easysoft ODBC-Zoho CRM Driver installer.](#)
2. Follow the onscreen instructions to progress through the installation wizard.

Updating files that are in use

To avoid rebooting your computer, the Easysoft ODBC-Zoho CRM Driver installer prompts you when files that it needs to update are in use by another application or service. This frees the locked files and allows the installation to complete without a system restart. The installer uses the **Restart Manager** to locate the applications that are using files that need updating. These applications are displayed in the **Files in Use** dialog box. To avoid a system restart, choose **Automatically close applications and attempt to restart them after setup is complete**. The Easysoft ODBC-Zoho CRM Driver installer then uses **Restart Manager** to try to stop and restart each application or service in the list. If possible, **Restart Manager** restores applications to the same state that they were in before it shut them down.

Licensing

By default, the installer starts the Easysoft License Manager, because you can't use the Easysoft ODBC-Zoho CRM Driver until you have a license. If you choose not to run Easysoft License Manager as part of the installation process, run License Manager from the **Easysoft** group in the Windows **Start** menu when you're ready to license the Easysoft ODBC-Zoho CRM Driver. These types of license are available:

- A free time-limited trial license, which gives you free and unrestricted use of the product for a limited period (usually 14 days).
- A full license if you have purchased the product. On purchasing the product you are given an authorization code, which you use to obtain a license.

To license the Easysoft ODBC-Zoho CRM Driver:

1. In License Manager, enter your contact details.

You **must** complete the **Name**, **E-Mail Address**, and **Company** fields.

The e-mail address **must** be the same as the one used to register at the Easysoft web site. Otherwise, you won't be able to obtain a trial license.

2. Choose **Request License**.

You're prompted to choose a license type.

3. Do one of the following:

- For a trial license, choose **Time Limited Trial**, and then choose **Next**.

-Or-

- For a purchased license, choose **Non-expiring License**, and then choose **Next**.

4. Choose your product from the drop-down list when prompted, and then choose **Next**.

5. For a purchased license, enter your authorization code when prompted, and then choose **Next**.

6. Choose how to get your license when prompted.

7. Do one of the following:

- Choose **On-line Request** if your machine is connected to the internet and can make outgoing connections to port 8884.

With this method, License Manager automatically requests and then applies your license.

-Or-

- Choose **View Request**. Then open a web browser and go to https://www.easysoft.com/support/licensing/trial_license.html or https://www.easysoft.com/support/licensing/full_license.html, as appropriate. In the web page, enter your machine number (labelled **Number** in the license request). For purchased licenses, you also need to enter your authorization code (labelled **Ref** in the license request).

We'll automatically email your license to the email address you supplied in License Manager.

-Or-

- Choose **Email Request** to email your license request to our licensing team. Once we've processed your request, we'll email your license to the email address you supplied in License Manager.

8. Close the License Manager windows and then choose **Finish**.

If you chose either **View Request** or **Email Request**, apply your license by double-clicking the email attachment when you get the license email from us. Alternatively, start License Manager from the **Easysoft** folder in the Windows **Start** menu. Then choose **Enter License** and paste the license in the space provided.

Once you've licensed the Easysoft ODBC-Zoho CRM Driver, the installation is complete.

Repairing the installation

The installer can repair a broken Easysoft ODBC-Zoho CRM Driver installation. For example, you can use the installer to restore missing Easysoft ODBC-Zoho CRM Driver files or registry keys. To do this:

1. In the Windows **taskbar**, enter Add or remove programs in the Windows **search** box.
2. Select Easysoft ODBC-Zoho CRM Driver in the list, and then choose **Repair**.

Uninstalling on Windows

This section explains how to remove the Easysoft ODBC-Zoho CRM Driver from your system.

Removing Easysoft ODBC-Zoho CRM Driver data sources

Easysoft ODBC-Zoho CRM Driver data sources are not removed when you uninstall the Easysoft ODBC-Zoho CRM Driver. You don't therefore need to recreate your Easysoft ODBC-Zoho CRM Driver data sources if you reinstall or upgrade. If you don't want to keep your Easysoft ODBC-Zoho CRM Driver data sources, use Microsoft **ODBC Data Source Administrator** to remove them, **before** uninstalling the Easysoft ODBC-Zoho CRM Driver:

1. In the Windows **taskbar**, enter Run in the Windows **search** box.
2. In the Windows **Run** dialog box, enter:

```
odbcad32.exe
```

3. Locate your data source in either the **User** or **System** tab.
4. Select the data source from the list, and then choose **Remove**.

If the **Remove** button isn't available, close **ODBC Data Source Administrator**, and then, in the Windows **Run** dialog box, enter:

```
%windir%\syswow64\odbcad32.exe
```

Repeat the previous two steps.

Removing the Easysoft ODBC-Zoho CRM Driver

1. In the Windows **taskbar**, enter Add or remove programs in the Windows **search** box.
2. Select Easysoft ODBC-Zoho CRM Driver in the list, and then choose **Uninstall**.

Note

Easysoft product licenses are stored in the Windows registry. When you uninstall, your licenses are not removed, so you do not need to relicense the product if you reinstall or upgrade.

Connecting to Zoho CRM

Applications that support ODBC interface with an ODBC Driver Manager, which is included with the operating system, and also the Easysoft ODBC driver distribution on some platforms. One of the jobs that the ODBC Driver Manager does is to manage ODBC data sources. A data source specifies which ODBC driver to load, which data store to connect to, and how to connect to it.

Before setting up a data source, you must have [successfully installed the Easysoft ODBC-Zoho CRM Driver](#).

Connecting from Windows

Creating an ODBC data source

1. In the Windows **taskbar search** box, enter "Run".
2. Do one of the following:
 - If your application is 64-bit, in the **Run** dialog box, enter:

```
odbcad32.exe
```

-Or-

- If your application is 32-bit, in the **Run** dialog box, enter:

```
%windir%\syswow64\odbcad32.exe
```

Note

If you're not sure whether your application is 32-bit or 64-bit, start your application, then in Windows **Task Manager** check whether your application's process name contains (32-bit). For example, the process name for the 32-bit version of Excel is Microsoft Excel (32-bit); the process name for the 64-bit version of Excel is Microsoft Excel. On older versions of Windows, 32-bit applications contain *32 in the process name rather than (32-bit).

For applications such as Oracle or SQL Server that run as a service, check the *Background processes* list rather than the **Apps** list in **Task Manager**. If you're running a programming language from within a Windows command-line shell (for example, Command or PowerShell), in your shell, run the .exe file for the programming language. For example, run perl, php, python, or node. In **Task Manager**, expand the process list for **Windows Command Processor** or **Windows PowerShell**, as appropriate, and check whether the process for your programming language contains (32-bit).

3. Do one of the following:
 - To create a data source that only the user you're currently logged in as can access, choose the **User** tab.
If your application is a Windows service (for example, SQL Server or Oracle) creating a user data source won't work, unless the service is running as the same user you're logged in as.
 - To create a data source that all users on this computer can access, choose the **System** tab.
4. Choose **Add**.
5. In the list of ODBC drivers, select Easysoft ODBC-Zoho CRM Driver, and then choose **Finish**.
6. Complete the Easysoft ODBC-Zoho CRM Driver configuration dialog box.
To find out how to do this, refer to the Connection attributes section.
7. To test the connection to Zoho CRM, choose **Test**.
Note that this doesn't test that the Easysoft ODBC-Zoho CRM Driver is licensed. If you haven't yet [licensed](#) the Easysoft ODBC-Zoho CRM Driver, this ODBC data source won't work with your

application, even if the **Test** button succeeds.

Connection attributes

- [Setting on Windows](#)

Setting on Windows

The Easysoft ODBC-Zoho CRM Driver data source configuration dialog box, accessible when you create or edit an Easysoft ODBC-Zoho CRM Driver data source in **ODBC Data Source Administrator** contains these fields:

Name	Value
DSN	The name of the data source. You'll need to specify this in your application. For example, your application may prompt you to choose this from a list of DSNs.
Description	Some applications display this to help users identify a particular data source.
Acc Server	The URI of your Zoho CRM server. For example, https://accounts.zoho.eu/ . If you leave this field blank, the Easysoft ODBC-Zoho CRM Driver attempts to discover this value when you authenticate and obtain a refresh token.
Location	The location of your Zoho CRM server. For example, eu. If you leave this field blank, the Easysoft ODBC-Zoho CRM Driver attempts to discover this value when you authenticate and obtain a refresh token.
Refresh Token	The Zoho CRM refresh token that enables the Easysoft ODBC-Zoho CRM Driver to work with your Zoho CRM data.
Local Filtering	When turned on, the Easysoft ODBC-Zoho CRM Driver increases its preferred batch size for queries, which alters the number of Zoho CRM API calls it makes. Zoho CRM may create batches that are larger or smaller than the requested size to maximise performance. There is no one correct setting for Local Filtering , it depends on how your application executes its queries. You may find that this attribute increases query performance for one application and decreases performance for another. By default, Local Filtering is turned off.
Proxy	If you use a proxy server connect to Zoho CRM, use this attribute to specify this server's details. Use this format: <code>http://address:port</code> where <i>address</i> is the host name or IP address of the proxy server and <i>port</i> is the proxy server port. For example: http://squid.example.com:8080

Name	Value
Proxy User	<p>If your proxy server has authentication turned on, use this attribute to supply a user name that can connect to the proxy server.</p> <p>The Easysoft ODBC-Zoho CRM Driver supports the Basic and Digest proxy authentication schemes.</p>
Proxy Password	The password for the proxy user.
Logging	Whether to turn on Easysoft ODBC-Zoho CRM Driver logging. Normally, you'll only do this if so directed by the Easysoft support team.
Log File	<p>The file name and path of the file you want the driver to write log information to. For example:</p> <p>C:\Windows\Temp\Easysoft.log</p> <p>If the file doesn't exist, the Easysoft ODBC-Zoho CRM Driver creates it.</p>
Flush On Update	Whether the Easysoft ODBC-Zoho CRM Driver flushes its cache when it is used to update or delete Zoho CRM data. When this setting is turned on, the effect of your changes will apply in your current session. For example, you turn on this setting and delete a record. If you then do a select in the same session, the record will no longer be present in the result set. If you do the same with Flush On Update turned off, the result set contains the deleted record until the Easysoft ODBC-Zoho CRM Driver cache expires or you reconnect your application (for example, you restart your SQL Server instance).
Cache Timeout	<p>The time in seconds that Easysoft ODBC-Zoho CRM Driver stores records in its cache. If you set the timeout to 0, the Easysoft ODBC-Zoho CRM Driver always caches records. The default value for Cache Timeout is 0.</p> <p>The Easysoft ODBC-Zoho CRM Driver flushes the cache when you close the connection to Zoho CRM. (For example, you quit your application or restart your application's service.)</p> <p>To reduce Zoho CRM API usage and reduce the amount of data retrieved over the network, the Easysoft ODBC-Zoho CRM Driver caches Zoho CRM records. By default, a record remains in the cache until the timeout elapses.</p> <p>Note that any changes to the record that happen at the Zoho CRM end aren't reflected in the cached copy until the cache is refreshed (that is, the timeout expires and the record is fetched again). If a cached record is changed by the Easysoft ODBC-Zoho CRM Driver, the cache is refreshed to reflect this change.</p>
Max Num	The maximum number of records to return for each Zoho CRM API request the Easysoft ODBC-Zoho CRM Driver makes.

DSN-less connections

Some applications allow you to make an ODBC connection without configuring a data source. To do this, you supply a connection string that contains the ODBC driver name and other driver-specific attribute-value pairs.

Connection string attributes have different names to the ones shown in the Easysoft ODBC-Zoho CRM Driver data source configuration dialog box. Use these attribute names in a connection string:

- Cache_Timeout
- Description
- Filter_Local
- Flush_On_Update
- Logfile
- Logging
- Max_Num
- Proxy_Pass
- Proxy_User
- Proxy
- Refresh-Token
- AccServer
- Location
- Refresh-Token

Here's an example connection string for the Windows version of the Easysoft ODBC-Zoho CRM Driver:

```
Driver={Easysoft Zoho CRM ODBC  
Driver};Refresh-Token=2000.d2927da21cff612e6818f832a47c256e.379428ee4a4abc3040799df  
f191f8620;Location=eu;AccServer=https://accounts.zoho.eu;Logging=Yes;LogFile=C:\\Te  
mp\\ZB.log;
```

For a list of the other attributes you can set in the connection string, refer to [this section](#).

Logging

If you report an issue to us, we may ask you to turn on ODBC Driver Manager or Easysoft ODBC-Zoho CRM Driver logging, to help us diagnose the cause of the issue.

To turn on logging, refer to the following sections.

Note

If your application is a service (for example, Oracle or SQL Server), you may need to restart the service before enabling logging takes effect. To do this on Linux or UNIX, use `service`, `systemctl`, or a vendor-supplied script. To do this on Windows, use the Windows **Services** app.

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