

2. Zoho CRM Integration User Guide

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this help file, please feel free to email to support@magene.st.com, we will be happy to assist.

Support Portal: <http://servicedesk.izysync.com/servicedesk/customer/portal/27>

- 1 [Introduction](#)
 - 1.1 [Features](#)
 - 1.2 [System Requirements](#)
 - 1.3 [Video Tutorial](#)
- 2 [Configuration](#)
 - 2.1 [Login to the Zoho account](#)
 - 2.2 [Configuration](#)
 - 2.3 [Synchronization Settings](#)
 - 2.4 [Field Mapping](#)
 - 2.5 [Manual Queue Adding](#)
 - 2.6 [Synchronization Process](#)
 - 2.7 [Synchronization History/Report](#)
- 3 [Main Features](#)
 - 3.1 [Zoho CRM Default Synchronization Fields](#)
 - 3.2 [Contact](#)
 - 3.3 [Account](#)
 - 3.4 [Lead](#)
 - 3.5 [Product](#)
 - 3.6 [Sales Order](#)
 - 3.7 [Invoice](#)
- 4 [Update](#)
- 5 [Support](#)

Introduction

Magento 2 Zoho CRM Integration synchronizes data automatically from your Magento 2 store to Zoho CRM.



Features

- Allows synchronizing and updating Customers from Magento store into Zoho CRM Leads, Contacts, Accounts both manually and automatically.
- Allows synchronizing and updating Products from Magento store into Zoho CRM Products both manually and automatically.
- Allows synchronizing Orders from Magento store into Zoho CRM Sales Orders both manually and automatically.
- Allows synchronizing Invoices from Magento store into Zoho CRM Invoices both manually and automatically.
- Admin can manage the field mappings in Magento 2 backend with ease
- It is very easy to use and set up
- Supports multiple languages
- View synchronization history from synchronization report
- View synchronization history in each item for Customers, Orders, and Products
- "Add to queue" mass action for Customers, Orders, Products and Invoices grid tables

System Requirements

Your store should be running on Magento Community Edition version **2.0.x, 2.1.x, 2.2.x, 2.3.x**

Magenest Zoho CRM Version 2.1.5 - Updated: April 7, 2023

Compatibility: Magento 2.3.x, 2.4.x

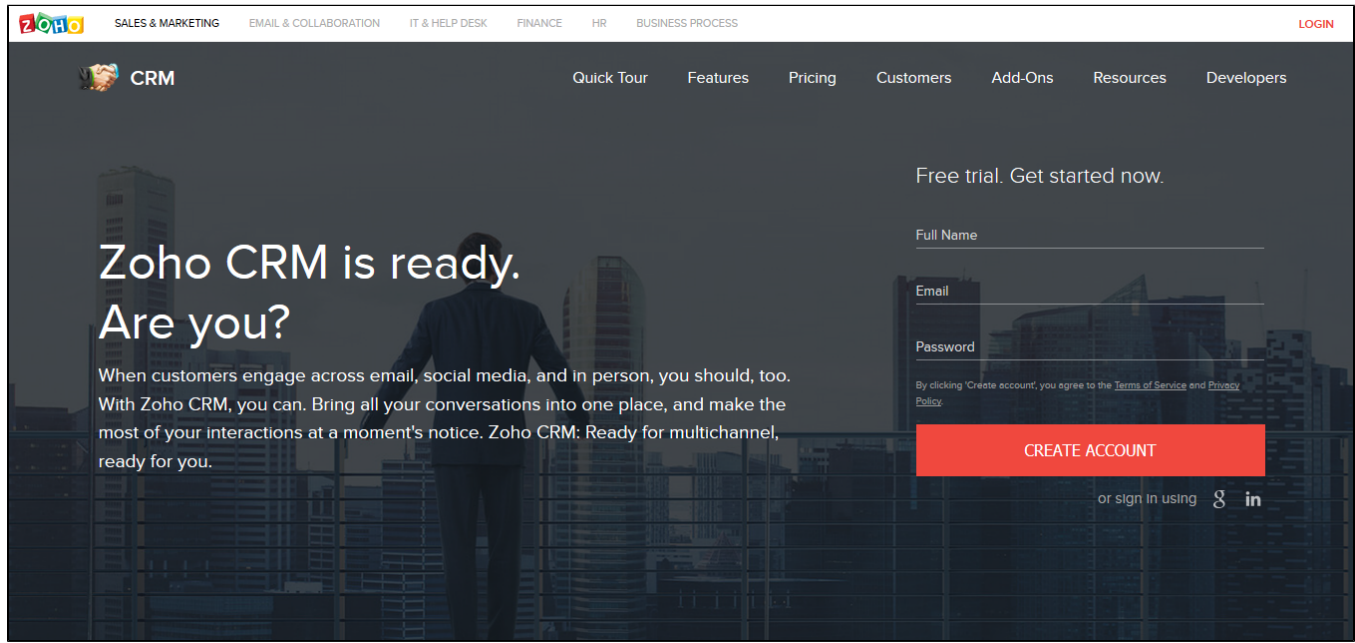
Compatible with Magento 2.4.6

Video Tutorial

Configuration

Login to the Zoho account

First, you have to create a Zoho account by going to <https://www.zoho.com/crm/>

The image is a screenshot of the Zoho CRM registration page. At the top, there is a navigation bar with the Zoho logo and links for SALES & MARKETING, EMAIL & COLLABORATION, IT & HELP DESK, FINANCE, HR, and BUSINESS PROCESS. Below this, a dark header bar contains the CRM logo and links for Quick Tour, Features, Pricing, Customers, Add-Ons, Resources, and Developers. The main content area has a dark background with a cityscape and a person standing on a balcony. On the left, the text reads "Zoho CRM is ready. Are you?" followed by a paragraph: "When customers engage across email, social media, and in person, you should, too. With Zoho CRM, you can. Bring all your conversations into one place, and make the most of your interactions at a moment's notice. Zoho CRM: Ready for multichannel, ready for you." On the right, there is a registration form with fields for Full Name, Email, and Password. Below the Password field, a small text line states: "By clicking 'Create account', you agree to the Terms of Service and Privacy Policy." A prominent red button labeled "CREATE ACCOUNT" is positioned below the form. At the bottom right, there is a link "or sign in using" followed by Google and LinkedIn icons.

Click on the **Create Account** button to register a new account.

Sign in to your Zoho CRM account

Email / Phone:

Password:

[Forgot Password?](#)

☒ Keep me signed in

Sign In

Sign In using



Don't have a Zoho account?

[Sign Up Now](#)

Configuration

Go to <https://accounts.zoho.com/developerconsole> to get your Zoho API credentials. (Client ID and Client Secret)



Zoho Client ID Details

Client ID

1000.GV

Client Secret

54c2265

Client Name



Client Domain

http://zoho.demo.izysync.com

Authorized redirect URIs

http://zoho.demo.izysync.com/admin/zohocrm/system_config_getauth/getAuthCode/

Update Client

Cancel

In Magento 2 backend, go to **Zoho CRM Integration > Configuration > Setup**.

Fill in the Client ID and Client Secret obtained from Zoho.

Choose your **Zoho CRM URL Endpoint**: .com or .eu

Remember to **turn off your Admin Key before getting an access token**. You can turn on this Admin Key later after connecting Magento 2 to Zoho CRM successfully.

Go to **Stores > Configuration > Advanced > Admin**, choose No in Add Secret Key to URLs.

SALES

DOTMAILER

SERVICES

ADVANCED

Admin

System

Developer

Configuration

Save Config

Security

Admin Account Sharing

Yes

Use system value

If set to Yes, you can log in from multiple computers into same account. Default setting No improves security.

Password Reset Protection Type

By IP and Email

Use system value

Recovery Link Expiration Period (hours)

2

Use system value

Please enter a number 1 or greater in this field.

Max Number of Password Reset Requests

5

Use system value

Limit the number of password reset request per hour. Use 0 to disable.

Min Time Between Password Reset Requests

10

Use system value

Delay in minutes between password reset requests. Use 0 to disable.

Add Secret Key to URLs

No

Use system value

Login is Case Sensitive

No

Admin Session Lifetime (seconds)

90000

Use system value

Please enter at least 60 and at most 31536000 (one year).

Maximum Login Failures to Lockout Account

6

Use system value

We will disable this feature if the value is empty.

Lockout Time (minutes)

30

Use system value

Password Lifetime (days)

99999

Use system value

We will disable this feature if the value is empty.

Click **Save Configuration** then **Get Access Token** in Zoho CRM Configuration.

Setup

Client Id

1000

Get Client Id and Client Secret at [here](#)

Note* Authorized redirect URIs:
(Client Domain)/admin/zohocrm/system_config_getauth/getAuthCode/
eg: yourdomain.com/admin/zohocrm/system_config_getauth/getAuthCode/

Client Secret

a4ae

Access Token

1000.b08af257b06ea7dbbf5c3a052b275053.ae9f35df1b74369c

Zoho CRM Url Endpoint

COM

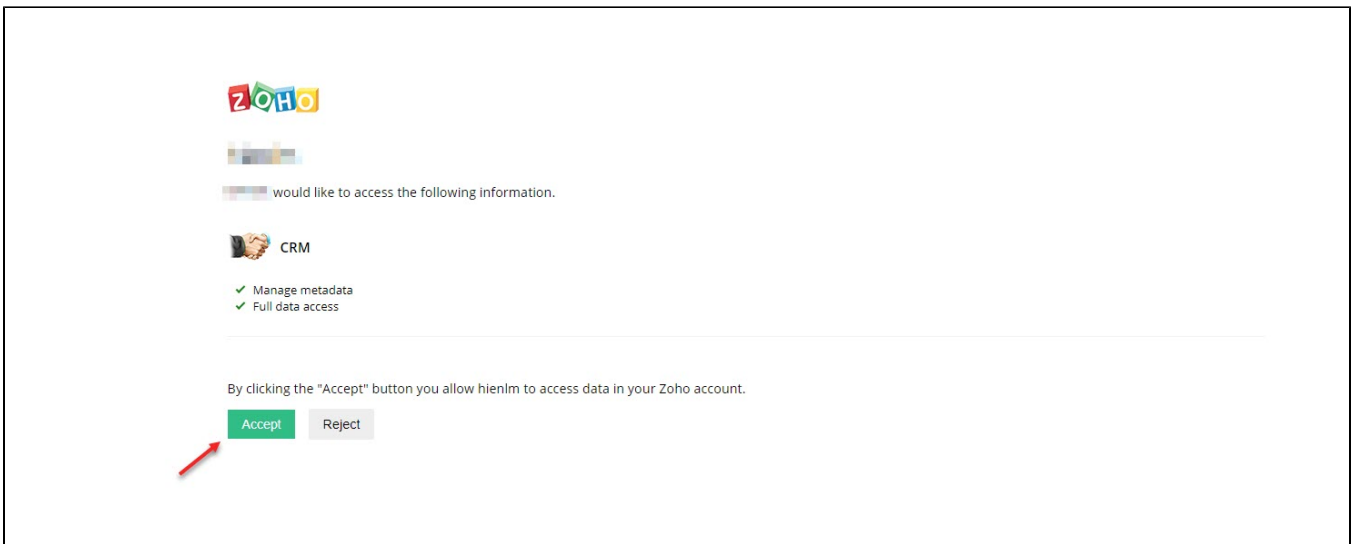
Get Access Token

Note* Save Client Id & Client Secret Configuration AND disable Add Secret Key to URLs in Admin configuration before get Access Token.

Save Report

Yes

You will be redirected to Zoho, in here Zoho will require to access your information. Click **Accept**



Save Report: Enable this to save the synchronization record in View Report.

Synchronization Settings

This extension allows you to synchronize the existing data as well as a new one from Magento 2 store to your Zoho CRM, including **Account, Campaign, Contact, Lead, Order, Invoice, Product**.

We highly recommend that you should synchronize the existing data from Magento 2 store to Zoho CRM account only one time.

You can enable synchronization for each data, as well as synchronization mode (Manual mode and Cron Job mode).

For manual mode, you have to go to Queue Page to sync data.

For cron job mode, data will be synced automatically every 15 minutes, 30 minutes, 1 hour, 2 hours, or at 3 a.m daily.

You can add all data to queue for later processing by clicking on **Sync All Data Now** button.

Synchronization Settings



Account

Enable
[store view]

Yes



Sync Mode
[store view]

Sync Manually



Campaign

Enable
[store view]

Yes



Sync Mode
[store view]

Sync Every



Time
[store view]

15 minutes

Contact

Enable
[store view]

Yes



Sync Mode
[store view]

Sync Every



Time
[store view]

30 minutes

Lead

Enable
[store view]

Yes

Turn on Lead Synchronization will create duplication with Account and Contact, which means a Customer can be in Lead, Account and Contact at the same time. Will also slow down the synchronization speed.



Sync Mode
[store view]

Sync Every



Time
[store view]

1 hour

Order

Enable
[store view]

Yes



Sync Mode
[store view]

Sync Every



Time

[store view]

2 hour

▼

Invoice

Enable

[store view]

Yes

▼

?

Sync Mode

[store view]

Sync Daily

▼

?

Product

Enable

[store view]

Yes

▼

?

Sync Mode

[store view]

Sync Manually

▼

?

Synchronize

Sync All Data Now

Field Mapping

In order to synchronize data fields from the Magento 2 store to your Zoho CRM account correctly, you need to create the mapping for these fields first.

Go to **Zoho CRM Integration > Field Mapping**

You can choose the type of data to set the field mapping (Accounts, Contacts, Campaigns, Leads, Products, Sales Orders, Invoices)

The Magento fields and Zoho CRM fields will display in a drop-down list. Choose the status **Enabled** to enable the field, then **Save Mapping**

Mapping Management

Search

24

zoho

Mapping

* Note: You should map the fields have the same name or the same data type

Accounts

Save Mapping

--Choose Type--

Accounts

Contacts

Campaigns

Leads

Products

Sales_Orders

Invoices

Magento Fields	Description	Status
Account Number (bigint)	Auto Generate	Enabled
Choose Fields--		Enabled
Created At	--Choose Fields--	Enabled
Updated At	--Choose Fields--	Enabled
Is Active	--Choose Fields--	Enabled
Created In	Account Site (text)	Enabled
Prefix	--Choose Fields--	Enabled

Manual Queue Adding

You can add data to the queue manually in the Customer, Product, Order, and Invoice grid table.

Customers

Search by keyword

Filters

Default View

20 per page

6 records found

Actions

Delete

Subscribe to Newsletter

Unsubscribe from Newsletter

Assign a Customer Group

Edit

Add to queue as Account

Add to queue as Contact

Add to queue as Lead

		Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in
	evvv@gmail.com	General					Jan 12, 2018 5:57:57 AM	Main Website	Confirmation Not Required	Default Store View
	ghuyenmy95@gmail.com	General					Jan 23, 2018 7:47:54 AM	Main Website	Confirmation Not Required	Default Store View
	@gmail.com	General	123456789	123456	United States	California	Jan 26, 2018 6:07:12 AM	Main Website	Confirmation Not Required	Default Store View
<input type="checkbox"/>	27 test test	thien95tm@gmail.com	General				May 28, 2018 7:55:43 AM	Main Website	Confirmation Not Required	Default Store View

Catalog

Filters

20 per page

2058 records found




Actions

Delete

Change status

Update attributes

Add to queue

	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility
	oust Duffle Bag	Simple Product	Bag	24-MB01	\$34.00		Catalog, Search
<input type="checkbox"/>	2  Bandeau Jumpsuit in Dusty Blue Knit	Simple Product	Default	F02	\$74.00	99.0000	Catalog, Search
<input type="checkbox"/>	3  Crown Summit Backpack	Simple Product	Bag	24-MB03	\$38.00	100.0000	Catalog, Search
<input type="checkbox"/>	4  Wayfarer Messenger Bag	Simple Product	Bag	24-MB05	\$45.00	100.0000	Catalog, Search

Orders

Search by keyword

Filters Default View

45 records found 20 per page

Add data to queue from order grid table

Actions	Order Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purch
Cancel	Website Store	Jun 13, 2018, 18:06:00 PM	Tuklal Poudel	Tuklal Poudel	\$38.00	\$38.00
Hold	Website Store	Jun 13, 2018, 6:06:00 AM	Pankaj Lad	Pankaj Lad	\$34.00	\$34.00
Unhold	Website Store	Jan 22, 2018, 8:01:00 AM	Hoang Ryu	Hoang Ryu	\$369.00	\$369.00
Print Invoices	Website Store	Jan 22, 2018, 7:01:00 AM	Hoang Ryu	Hoang Ryu	\$369.00	\$369.00
Print Packing Slips	Website Store	Jan 22, 2018, 7:01:00 AM	Hoang Ryu	Hoang Ryu	\$369.00	\$369.00
Print Credit Memos	Website Store	Jan 22, 2018, 7:01:00 AM	Hoang Ryu	Hoang Ryu	\$369.00	\$369.00
Print All	Website Store	Jan 22, 2018, 7:01:00 AM	Hoang Ryu	Hoang Ryu	\$369.00	\$369.00
Print Shipping Labels	Website Store	Jan 22, 2018, 7:01:00 AM	Hoang Ryu	Hoang Ryu	\$369.00	\$369.00
Add to queue	Website Store	Jan 22, 2018, 7:01:00 AM	Hoang Ryu	Hoang Ryu	\$369.00	\$369.00
000000041	Main Website	Jan 22, 2018, 7:01:00 AM	Hoang Ryu	Hoang Ryu	\$369.00	\$369.00

Invoices

Search by keyword

Filters Default View

13 records found 20 per page

Add data to queue from Invoices grid table

Actions	Order #	Order Date	Bill-to Name	Status	Grand Total (Base)	Grand Total (Purch
PDF Invoices	000000001	Apr 22, 2017 1:23:41 AM		Paid	\$36.39	\$36.39
Add to queue	000000002	Apr 22, 2017 1:23:42 AM		Paid	\$39.64	\$39.64
	000000003	Jun 13, 2017 7:22:06 AM		Paid	\$48.00	\$48.00
	000000004	Dec 27, 2017 1:02:50 AM		Paid	\$50.00	\$50.00
	000000005	Jan 12, 2018 4:14:34 AM		Paid	\$400.00	\$400.00
	000000006	Jan 12, 2018 4:18:58 AM		Paid	\$200.00	\$200.00
	000000007	Jan 12, 2018 6:00:29 AM		Paid	\$36.00	\$36.00

You can also add data in the Queue grid table using Add [data type] button.

Synchronization Process

Data will be added to the queue for processing. In the data queue, click on the **Sync All** button to synchronize all data in the queue to Zoho CRM, or use the Sync [data type] button to synchronize each data.

***NOTE: Synchronizing will take time, the length of time depends on the size of the database.**

Queue

Total record: 6

Instant syncing button

Sync All

Sync Account

Sync Campaign

Sync Contact

Sync Lead

Sync Order

Sync Invoice

Sync Product

Add Account

Add Campaign

Add Contact

Add Lead

Add Order

Add Invoice

Add Product

Filters

Columns

Actions

6 records found

20

per page

<

1

of

	ID	Magento Entity Id	Enqueue Time	Type	Status
<input type="checkbox"/>	29692	1	2018-07-20 06:28:25	Campaigns	error
<input type="checkbox"/>	29691	29	2018-07-16 11:23:59	Accounts	pending
<input type="checkbox"/>	29690	28	2018-07-16 11:23:59	Accounts	pending
<input type="checkbox"/>	29689	27	2018-07-16 11:23:59	Accounts	pending
<input type="checkbox"/>	29688	26	2018-07-16 11:23:59	Accounts	pending
<input type="checkbox"/>	29687	20	2018-07-16 11:23:59	Accounts	pending

Synchronization History/Report

When the process is done, you can go to **Zoho CRM Integration > View Report** to track the synchronized data.

View Report

Filters

Default View

Columns

Export

Actions

7996 records found

20

per page

<

1

of 400

>

	ID	Record ID in ZohoCRM	ZohoCRM Table	Action	Username	Datetime	Email
<input type="checkbox"/>	8000	3170593000001988501	Products	record updated	magenest magenest	2018-06-28 06:46:36	magenest@gmail.com
<input type="checkbox"/>	7999	3170593000002004713	Products	record updated	magenest magenest	2018-06-28 06:46:36	magenest@gmail.com
<input type="checkbox"/>	7998	3170593000002004712	Products	record updated	magenest magenest	2018-06-28 06:46:36	magenest@gmail.com
<input type="checkbox"/>	7997	3170593000002004711	Products	record updated	magenest magenest	2018-06-28 06:46:36	magenest@gmail.com
<input type="checkbox"/>	7996	3170593000002004710	Products	record updated	magenest magenest	2018-06-28 06:46:36	magenest@gmail.com
<input type="checkbox"/>	7995	3170593000002004709	Products	record updated	magenest magenest	2018-06-28 06:46:36	magenest@gmail.com
<input type="checkbox"/>	7994	3170593000002004708	Products	record updated	magenest magenest	2018-06-28 06:46:36	magenest@gmail.com
<input type="checkbox"/>	7993	3170593000002004707	Products	record updated	magenest magenest	2018-06-28 06:46:36	magenest@gmail.com

You can also view the synchronization history in Customer, Product, Order info

Hoang Ryu

← Back

Delete Customer

Reset

Create Order

Reset Password

Force Sign-In

Save and Continue Edit

Billing Agreements

Newsletter

Product Reviews

Wish List

Zoho CRM Integration

Add Lead to queue:

Add Lead to queue Now

Add Account to queue:

Add Account to queue Now

Syncing history in each customer info

Sync History

2018-06-28 06:44:55	Contacts	record added	Ok
2018-06-28 06:44:54	Leads	record added	Ok
2018-06-28 06:44:53	Accounts	record added	Ok
2018-06-14 07:16:08	Contacts	record added	Ok
2018-06-13 22:16:19	Contacts	record updated	Ok
2018-06-13 22:08:32	Contacts	record updated	Ok
2018-06-13 22:06:35	Contacts	record updated	Ok
2018-06-13 21:38:51	Contacts	record updated	Ok

Off the Shoulder Drawcord Dress in Mink Satin

← Back

Add Attribute

Save

Downloadable Information

Zoho CRM Integration

Information

Zoho Product ID:

3170593000001988415

Last Updated At:

Jun 28, 2018, 6:44:57 AM

Created At:

Jun 4, 2018, 2:37:59 PM

Add to queue Now

Syncing history in each product info

Sync History

2018-06-28 06:44:57	Products	record updated	Ok
2018-06-14 08:54:19	Products	record added	Ok
2018-06-14 07:16:07	Products	record added	Ok
2018-06-13 22:06:35	Products	record updated	Ok
2018-06-13 21:38:51	Products	record added	Ok
2018-06-13 21:38:45	Products	invalid data	Failed
2018-06-04 14:37:59	Products	invalid data	Failed

#000000045

24

zoho

← Back

Send Email

Credit Memo

Reorder

ORDER VIEW

Information

Invoices

Credit Memos

Shipments

Comments History

Zoho CRM Integration

Information

Zoho Order ID: 3170593000001975143

Last Updated At: Jun 28, 2018, 6:45:01 AM

Created At: Jun 14, 2018, 7:16:10 AM

Sync Order:

Add Order To Queue Now

Syncing history in each order info

Sync History

2018-06-28 06:45:01	Sales_Orders	record added	Ok
2018-06-23 07:08:56	Sales_Orders	record updated	Ok
2018-06-14 09:59:33	Sales_Orders	record updated	Ok
2018-06-14 09:12:41	Sales_Orders	record updated	Ok

Main Features

- When a new account is registered in Magento 2, Zoho will automatically add a new record of this account in Leads

In Magento 2 Register Page

[Sale](#) [Training](#) [Women](#)**Account Dashboard**[Account Information](#)
[Address Book](#)
[My Downloadable Products](#)
[My Orders](#)
[Newsletter Subscriptions](#)
[My Credit Cards](#)
[Billing Agreements](#)
[My Product Reviews](#)
[My Wish List](#)**Compare Products**

You have no items to compare.

My Wish List

You have no items in your wish list.

My Dashboard

Account Information

Contact Information

Mia Abigail
miaabigail@gmail.com
[Edit](#) | [Change Password](#)

Newsletters

You subscribe to "General Subscription".
[Edit](#)

Address Book [Manage Addresses](#)

Default Billing Address

Mia Abigail
305 E 18th St, New York, NY 10003, USA
New York , New York, 12345
United States
T: 0986774868
[Edit Address](#)

Default Shipping Address

Mia Abigail
305 E 18th St, New York, NY 10003, USA
New York , New York, 12345
United States
T: 0986774868
[Edit Address](#)

In Zoho's Leads

Home
Feeds
Leads
Accounts
Contacts
Deals
Activities
Reports
Dashboards
...

13 days Trial remaining
Upgrade

Q
Game Controller
Bell
+
Print
Scissors

←

M
Mia Abigail - Magenest

Send Email
Convert
Edit
...

Lead Owner
IsabellaOlivia
Email
miaabigail@gmail.com
Phone
(098) 677-4868
Mobile
Lead Status

HIDE DETAILS
^

Lead Information

Lead Owner

IsabellaOlivia

Title

Phone

(098) 677-4868

Mobile

Lead Source

Industry

Annual Revenue

Email Opt Out

Modified By

IsabellaOlivia
Fri, 7 Apr 2017 02:41 AM

Company

Magenest

Lead Name

Mia Abigail

Email

miaabigail@gmail.com

Fax

Website

https://store.magenest.com/

Lead Status

No. of Employees

Rating

Created By

IsabellaOlivia
Fri, 7 Apr 2017 02:21 AM

Skype ID

Secondary Email

Twitter

Address Information

Street

305 E 18th St, New York, NY 10003, USA

State

New York

Country

United States

City

New York

Zip Code

12345

Locate Map

Description Information

Description

VIP


- When a customer updates his information, data in Leads and Contacts will also be updated automatically

In Zoho's Contacts

Home
Feeds
Leads
Accounts
Contacts
Deals
Activities
Reports
Dashboards
...

13 days Trial remaining
Upgrade

Q
🎮
🔔
+
📄
✂️

←

Mia Abigail

Send Email
Edit
...

Contact Owner
IsabellaOlivia
Email
miaabigail@gmail.com
Phone
📞 (098) 677-4868
Mobile
Department

HIDE DETAILS ^

Contact Information

Contact Owner
IsabellaOlivia

Account Name

Email
miaabigail@gmail.com

Phone
(098) 677-4868 📞

Other Phone

Mobile

Assistant

Reports To

Created By
IsabellaOlivia
Fri, 7 Apr 2017 02:22 AM

Modified By
IsabellaOlivia
Fri, 7 Apr 2017 03:02 AM

Lead Source

Contact Name
Mia Abigail

Vendor Name

Title

Department

Home Phone

Fax

Date of Birth

Asst Phone

Email Opt Out

Skype ID

Secondary Email

Twitter

Address Information

Mailing Street
305 E 18th St, New York, NY 10003, USA

Mailing City
New York

Mailing State
New York

Mailing Zip
12345

Mailing Country
United States

Other Street

Other City

Other State

Other Zip

Other Country

Locate Map

Description Information

Description

VIP

- When a customer adds items to the cart then checks out, Sales Orders in Zoho will be auto-synced. Also, a record in Accounts of that customer will also be added if not exist

After successfully placed an order

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

CRM INTEGRATION

REPORTS

#000000009

Q

14

zoho

← Back

Cancel

Send Email

Hold

Invoice

Reorder

Edit

ORDER VIEW

Information

Invoices

Credit Memos

Comments History

Order & Account Information

Order # 000000009 (The order confirmation email was sent)

Order Date

Apr 7, 2017, 9:41:02 AM

Order Status

Pending

Purchased From

Main Website
Main Website Store
Default Store View

Placed from IP

118.70.109.213

Account Information

Customer Name

Mia Abigail

Email

miaabigail@gmail.com

Customer Group

General

Address Information

Billing Address [Edit](#)

Mia Abigail
305 E 18th St, New York, NY 10003, USA
New York , New York, 12345
United States
T: 0986774868

Payment & Shipping Method

Payment Information

Check / Money order
The order was placed using USD.

Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Yoga Adventure SKU: Yoga Adventure Links: Trailer #1 (0 / 2)	Ordered	\$75.00	\$75.00	Ordered 1	\$75.00	\$0.00	0%	\$0.00	\$75.00

Order Total

Notes for this Order

Status

Pending

Comment

☐ Notify Customer by Email

☐ Visible on Storefront

Submit Comment

Order Totals

Subtotal	\$75.00
Grand Total	\$75.00
Total Paid	\$0.00
Total Refunded	\$0.00
Total Due	\$75.00

In Zoho's Sales Orders

Home

Feeds

Leads

Accounts

Contacts

Deals

Activities

Reports

Dashboards

Sales Orders

...

10 days Trial remaining [Upgrade](#)

Info

Timeline Last Update : 06:21 PM

RELATED LIST

Notes

Invoices

Attachments

Open Activities

Closed Activities

Emails

LINKS What are links?

← 000000009 [Convert](#) [Edit](#) [...](#)

SO Number 2474871000000131022

Status Created

Due Date Apr 7, 2017

Sales Order Owner IsabellaOlivia

Pending

Carrier

ACCOUNTS

miaabigail@gmail.com

(098) 677-4868

HIDE DETAILS

Sales Order Information

Sales Order Owner IsabellaOlivia

Subject 000000009

Customer No.

Quote Name

Pending

Carrier

Sales Commission

Account Name miaabigail@gmail.com

Modified By IsabellaOlivia
Sun, 9 Apr 2017 06:21 PM

SO Number 2474871000000131022

Deal Name

Purchase Order 75.0000

Due Date Apr 7, 2017

Contact Name

Excise Duty

Status Created

Created By IsabellaOlivia
Sun, 9 Apr 2017 06:21 PM

Address Information

Billing Street 305 E 18th St, New York, NY 10003, USA

Billing City New York

Billing State New York

Billing Code

Billing Country

Shipping Street

Shipping City

Shipping State

Shipping Code

Shipping Country

Product Details

#	Product Details	List Price (\$)	Quantity	Amount (\$)	Discount (\$)	Tax (\$)	Total (\$)
1	Yoga Adventure (Yoga Adventure)	75.00	1	75.00	0.00	0.00	75.00
							Sub Total \$ 75.00
							Discount \$ 0.00
							Tax \$ 0.00
							Adjustment \$ 0.00
							Grand Total \$ 75.00

Home

Feeds

Leads

Accounts

Contacts

Deals

Activities

Reports

Dashboards

Sales Orders

...

10 days Trial remaining

Upgrade

Q

+

Info

Timeline

RELATED LIST

Notes

Attachments

Deals

Contacts

Emails

Open Activities

Closed Activities

Products

Quotes

Sales Orders

Invoices

Member Accounts

Cases

←

miaabigail@gmail.com

Edit

...

Account Owner

IsabellaOlivia

Industry

Employees

Annual Revenue

Phone

(098) 677-4868

HIDE DETAILS

^

Account Information

Account Owner	IsabellaOlivia	Rating	
Account Name	miaabigail@gmail.com	Phone	(098) 677-4868
Account Site		Fax	
Parent Account		Website	
Account Number	0	Ticker Symbol	
Account Type		Ownership	
Industry		Employees	
Annual Revenue		SIC Code	
Created By	IsabellaOlivia	Modified By	IsabellaOlivia
	Sun, 9 Apr 2017 06:20 PM		Sun, 9 Apr 2017 06:43 PM

Address Information

Billing Street	305 E 18th St, New York, NY 10003, USA	Shipping Street	305 E 18th St, New York, NY 10003, USA
Billing City	New York	Shipping City	New York
Billing State	New York	Shipping State	New York
Billing Code	12345	Shipping Code	12345
Billing Country		Shipping Country	United States

Description Information

Description

VIP

- When admin add a new product in Magento 2, Zoho will auto sync data about that product

After successfully Added Ball Pup



Yoga Adventure

Search 14 zoho

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

CRM INTEGRATION



Store View: All Store Views



Back

Add Attribute

Save



Enable Product ☒ Yes

Attribute Set Default

Product Name * Yoga Adventure

SKU * Yoga Adventure

Price * \$ 75.00

[Advanced Pricing](#)

Tax Class Taxable Goods

Quantity 28

[Advanced Inventory](#)

Stock Status In Stock

Weight lbs This item has no weight

Categories Training New Category

Visibility Catalog, Search

Set Product as New From To

Content

Configurations

Product Reviews

Images And Videos

Add Video

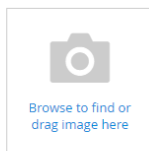


398x560 px, 39 KB

Base

Small

Thumbnail



Search Engine Optimization

Related Products, Up-Sells, and Cross-Sells

Customizable Options

Product in Websites

Design
Schedule Design Update
Gift Options
Downloadable Information

Copyright © 2017 Magento Commerce Inc. All rights reserved.

Magento ver. 2.1.0
[Report Bugs](#)

In Zoho's Products

Home
Feeds
Leads
Accounts
Contacts
Deals
Activities
Reports
Dashboards
Products

10 days Trial remaining
Upgrade

Info
Timeline
Last Update : a while ago

RELATED LIST
Notes
Price Books
Attachments
Open Activities
Closed Activities
Cases
Solutions
Contacts
Leads
Deals
Accounts

LINKS
What are links?

Yoga Adventure - Yoga Adventure
Edit

Product Category
Unit Price
\$ 75.00
Vendor Name
Qty Ordered
0
Quantity in Stock
28

HIDE DETAILS

Product Information
Product Owner
IsabellaOlivia
Product Code
Yoga Adventure
Product Active
Product Category
Sales End Date
Support End Date
Modified By
IsabellaOlivia
Sun, 9 Apr 2017 07:23 PM

Product Name
Yoga Adventure
Vendor Name
Manufacturer
Sales Start Date
Support Start Date
Created By
IsabellaOlivia
Fri, 7 Apr 2017 01:56 AM

Price Information
Unit Price
\$ 75.00
Tax
Taxable

Commission Rate
\$ 0.00

Stock Information
Usage Unit
Quantity in Stock
28
Handler

Qty Ordered
0
Reorder Level
0
Quantity in Demand
0

Description Information
Description

- When the admin adds a new Promotion in Magento 2, Zoho will auto sync data about it as a Campaign. All editing will also be synced

Home

Feeds

Leads

Accounts

Contacts

Deals

Activities

Reports

Dashboards

Campaigns

...

10 days Trial remaining

Upgrade

Q

Info

Timeline

RELATED LIST

Notes

Open Activities

Attachments

Closed Activities

Leads

Deals

Contacts

LINKS

What are links?

←

Summer promotion

Apr 10, 2017

Apr 15, 2017

Edit

...

Campaign Owner

IsabellaOlivia

Type

Advertisement

Status

Active

Actual Cost

\$ 0.00

HIDE DETAILS

^

Campaign Information

Campaign Owner

IsabellaOlivia

Campaign Name

Summer promotion

Start Date

Apr 10, 2017

Expected Revenue

Actual Cost

\$ 0.00

Numbers sent

Modified By

IsabellaOlivia

Sun, 9 Apr 2017 07:52 PM

Type

Advertisement

Status

Active

End Date

Apr 15, 2017

Budgeted Cost

Expected Response

Created By

IsabellaOlivia

Fri, 7 Apr 2017 01:56 AM

Description Information

Description

Sale off 50%

- When an invoice is made by admin in Magento 2, the Invoice in Zoho will be synced.

When an invoice is successfully sent



DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

INTEGRATION



#000000007



zoho

← Back Send Email Print

Order & Account Information

Order # 000000009 (The order confirmation email was sent)

Order Date	Apr 7, 2017, 9:41:02 AM
Order Status	Complete
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	118.70.109.213

Account Information

Customer Name	Mia Abigail
Email	miaabigail@gmail.com
Customer Group	General

Address Information

Billing Address [Edit](#)

Mia Abigail
305 E 18th St, New York, NY 10003, USA
New York, New York, 12345
United States
T: 0986774868

Payment & Shipping Method

Payment Information

Check / Money order
The order was placed using USD.

Items Invoiced

Product	Price	Qty	Subtotal	Tax Amount	Discount Amount	Row Total
Yoga Adventure SKU: Yoga Adventure Links Trailer #1 (2)	\$75.00	1	\$75.00	\$0.00	\$0.00	\$75.00

Order Total

Invoice History

Comment Text

- ☐ Notify Customer by Email
☐ Visible on Storefront

Submit Comment

Invoice Totals

Subtotal	\$75.00
Grand Total	\$75.00

In Zoho's Invoices

Home
Feeds
Leads
Accounts
Contacts
Deals
Activities
Reports
Dashboards
Invoices
...

10 days Trial remaining
Upgrade

Search
Add
Share

Info
Timeline
Last Update : 06:21 PM
RELATED LIST
Notes
Attachments
Open Activities
Closed Activities
Emails
LINKS
What are links?

000000007
Edit
...

Invoice Number
2474871000000129024
Invoice Date
Apr 10, 2017
Due Date
Grand Total
75
Contact Name
Account Name
miaabigail@gmail.com

ACCOUNTS
miaabigail@gmail.com
(998) 677-4868

HIDE DETAILS

Invoice Information

Invoice Owner
IsabellaOlivia
Subject
000000007
Invoice Date
Apr 10, 2017
Due Date
Sales Commission
\$ 75.00
Account Name
miaabigail@gmail.com
Contact Name

Invoice Number
2474871000000129024
Sales Order
Purchase Order
9
Excise Duty
Status
Created
Created By
IsabellaOlivia
Sun, 9 Apr 2017 06:21 PM
Modified By
IsabellaOlivia
Sun, 9 Apr 2017 06:21 PM

Address Information

Billing Street
Billing City
Billing State
New York
Billing Code
Billing Country

Shipping Street
Shipping City
Shipping State
Shipping Code
Shipping Country

Product Details

#	Product Details	List Price (\$)	Quantity	Amount (\$)	Discount (\$)	Tax (\$)	Total (\$)
1	Yoga Adventure (Yoga Adventure)	75.00	1	75.00	0.00	0.00	75.00
Sub Total							\$ 75.00
Discount							\$ 0.00
Tax							\$ 0.00
Adjustment							\$ 0.00
Grand Total							\$ 75.00

Terms and Conditions

Description Information

- When admin deletes a customer account in Magento, that customer will also be wiped from Leads, Accounts, and Contacts in Zoho.

Zoho CRM Default Synchronization Fields

⚠ The fields in Red are hard-code

Contact

Magento Customer	Zoho CRM Contact
Email	Email
First name	First name
Last name	Last name
Customer Name	Account Name
Date of Birth	Date of Birth
Billing Street	Mail Street
Billing City	Mail City
Billing State/Province	Mail State
Billing Country	Mail Country
Billing Telephone	Phone
Billing Fax	Fax
Shipping Street	Other Street
Shipping City	Other City
Shipping State/Province	Other State
Shipping Country	Other Country

Account

Magento Customer	Zoho CRM Account
ID	Account Number
Customer Name	Account Name
Billing Street	Billing Street
Billing City	Billing City
Billing State/Province	Billing State
Billing Country	Billing Country
Billing Telephone	Phone
Billing Fax	Fax
Shipping Street	Shipping Street
Shipping City	Shipping City
Shipping State/Province	Shipping State
Shipping Country	Shipping Country

Lead

Magento Customer	Zoho CRM Lead
Email	Email
First Name	First Name
Last Name	Last Name
Billing Street	Street
Billing City	City
Billing State/Province	State
Billing Country	Country
Billing Telephone	Phone
Billing Fax	Fax

Product

Magento Customer	Zoho CRM Product
Name	Product Name
SKU	Product Code
Status	Product Active
Price	Unit Price
Quantity	Quantity in Stock
Description	Description

Sales Order

Magento	Zoho CRM Sales Order
Increment ID	Subject
Created At	Due At
Status	Status
Customer Id	Customer_No
Customer Name	Account Name
Billing Street	Billing Street
Billing City	Billing City
Billing State/Province	Billing State/Province
Billing Zip/Postal Code	Billing Zip/Postal Code
Billing Country	Billing Country
Shipping Street	Shipping Street
Shipping City	Shipping City
Shipping State/Province	Shipping State
Shipping Zip/Postal Code	Shipping Code
Shipping Country	Shipping Country

Shipping Amount	Adjustment
Tax Amount	Tax
Discount	Discount

Invoice

Magento	Zoho CRM Invoice
Increment ID	Subject
Created At	Invoice Date
State	Status
Order ID	Sales Order
Customer Name	Account Name
Billing Street	Billing Street
Billing City	Billing City
Billing State/Province	Billing State/Province
Billing Zip/Postal Code	Billing Zip/Postal Code
Billing Country	Billing Country
Shipping Street	Shipping Street
Shipping City	Shipping City
Shipping State/Province	Shipping State
Shipping Zip/Postal Code	Shipping Zip
Shipping Country	Shipping Country
Shipping Amount	Adjustment
Tax Amount	Tax
Discount	Discount

Update

- When a bug fix or new feature is released, we will provide you with the module's new package.
- All you need to do is repeating the above installing steps and uploading the package onto your store. The code will automatically override.
- Flush the config cache. Your store and newly installed module should be working as expected.

Support

- We will reply to support requests within **2 business days**.
 - We will offer **lifetime free update and 6 months free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
 - Support **DOES NOT** include other series such as customizing our products, installation and uninstallation service.
-

Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.

Magenest