2. Magento Zoho CRM Integration User Guides

- Introduction to Magento Zoho CRM Integration
 - Features
 - System Requirements
 - Video Tutorial Playlist
- Configuration
 - Generating Zoho Auth token
 - Filling in necessary information
- Data Integration Settings
- Main Functions
- Update
- Support

Introduction to Magento Zoho CRM Integration

Magento Zoho CRM Integration is a prehensive module that provides automatic data synchronizing solution from your Magento sites to Zoho CRM.

Features

- 1. The Module supports the following synchronizations:
 - Customer Accounts in Magento to Leads, Contacts and Accounts in Zoho.
 - Products in Magento to Products in Zoho.
 - · Promotions in Magento to Campaigns in Zoho.
 - Orders in Magento to Sales Orders in Zoho
 - Invoices in Magento to Invoices in Zoho.
- 2. Admin can easily define field mappings to select what data to sync.
- 3. Admin can view the report to see the sync history between the two platforms.

For each request, you can only sync ferwer than 100 records (<100 records/request).

System Requirements

Your store should be running on Magento Community Edition version 1.8.x or 1.9.x.

Video Tutorial Playlist

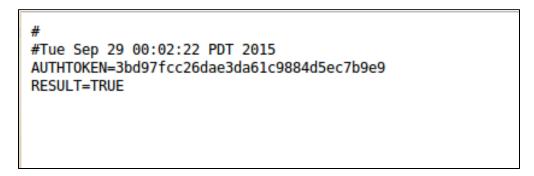
(Go to the playlist to view more: https://www.youtube.com/playlist?list=PLOgckfH7zIZslbCnBHu6KVKseSsrJsnTh)

Configuration

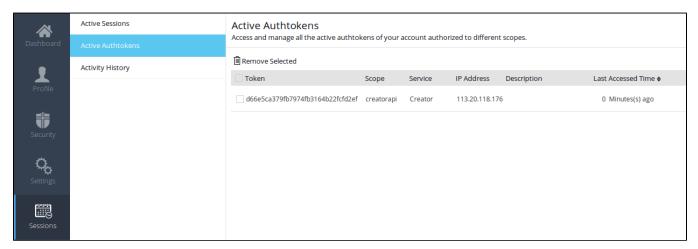
First, you need to log into Magento's backend site. Click on **ZohoCRM Integration Configuration.**

Generating Zoho Auth token

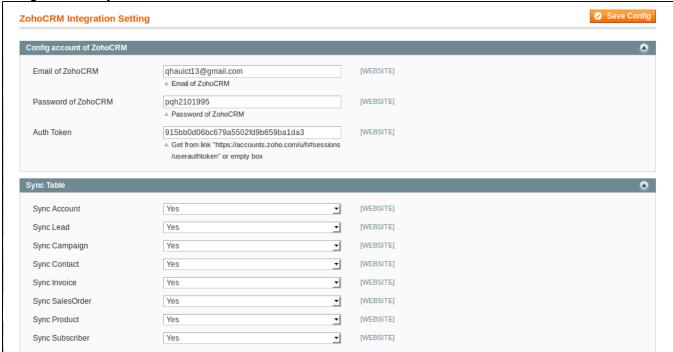
- Method 1:
 - Using the URL format: https://accounts.zoho.com/apiauthtoken/nb/create?SCOPE=ZohoCRM/crmapi&EMAIL_ID=Zoho CRM Username or Email ID&PASSWORD=Your Zoho CRM Password
 - The generated output looks like this:



- Method 2:
 - O Just leave the Auth token field blank, it will be automatically generated after you hit Save Config
 - However, it is important for you to clear active auth token after a while. If the number of active auth token goes above 10, the extension cannot function properly.
 - ° Click on your Profile picture at the top right corner, click on My Account -> Preferences -> Sessions -> Active Authtokens
 - Delete active authtokens



Filling in necessary information

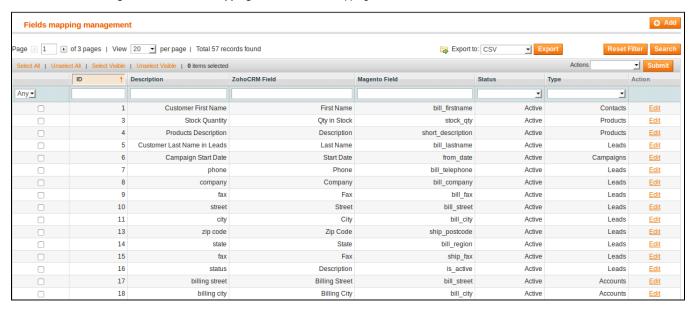


- Fill in your email ID, password and auth token of Zoho.
- · Choose fields that you want to sync and hit Save Config

Data Integration Settings

• You can choose which data fields you want to sync from Magento to Zoho.

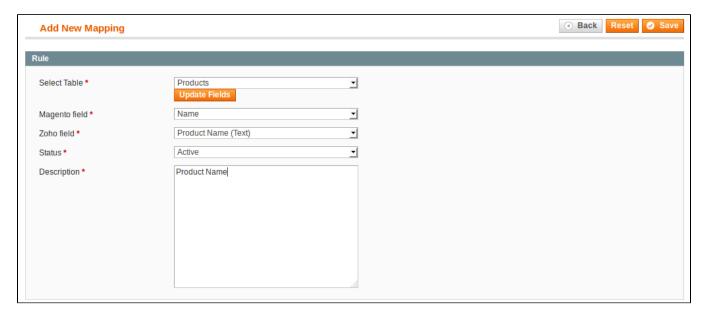
Click on ZohoCRM Integration tab -> Field Mapping to view available mappings



• You can edit, export to CSV, change status for fields or delete fields.



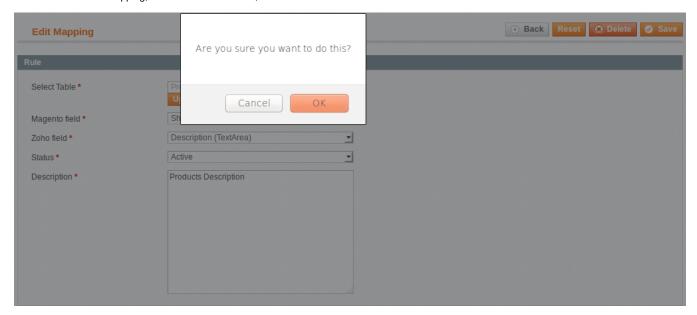
• To add new mapping, click on **Add** button then choose field mapping you want to sync



- 1. Select Table: select table that you want to sync
- 2. Magento Field: select Magento data field
- 3. Zoho Field: select Zoho data field
- 4. Status: active or deactive this data field sync
- 5. Description: describe this mapping

Then click on Save. Your field mapping will be included in the next sync.

• To delete a mapping, Click on **Edit -> Delete**, Hit **OK** to confirm delete.

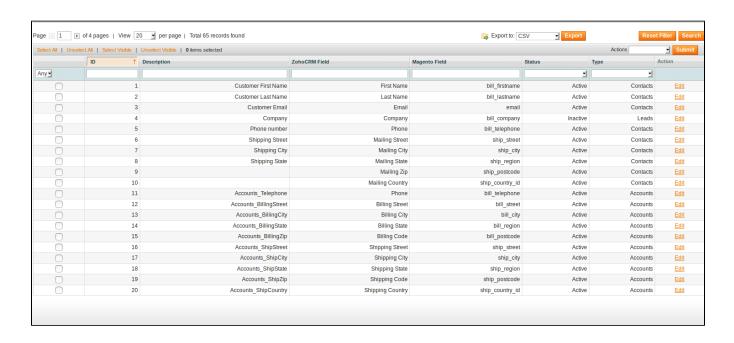


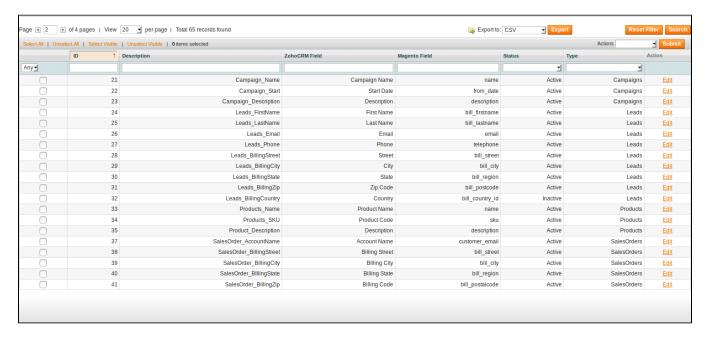
• To retrieve newly created fields in Zoho, click on **ZohoCRM Integration -> Retrieve Fields**.

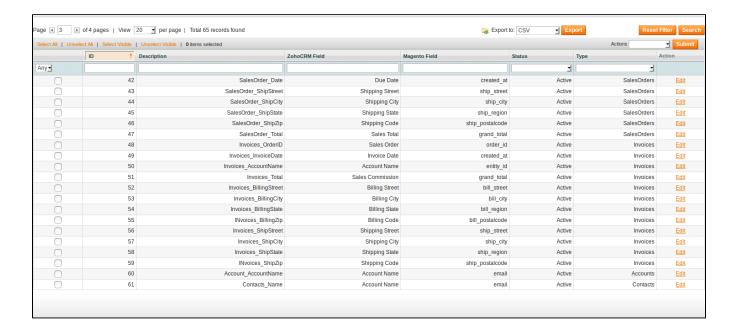


Mapping Field Template

Admins can refer to some mapping field templates below:









Main Functions

- 1. When a new account is registered in Magento, Zoho will automatically add a new record of this account in Leads
 - In Magento Register Page

MY DASHBOARD

Thank you for registering with Main Website Store.

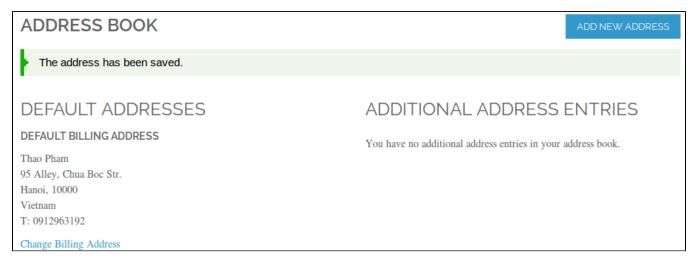
Hello, Thao Pham!

From your My Account Dashboard you have the ability to view a snapshot of your recent account activity and update your account information. Select a link below to view or edit information.

• In Zoho's Leads



- 2. When a customer updates his information, data in Leads and Contacts will also be updated automatically.
 - After successfully editing information



• In Zoho's Contacts



- 3. When a customer adds items to cart then check 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.

YOUR ORDER HAS BEEN RECEIVED.

THANK YOU FOR YOUR PURCHASE!

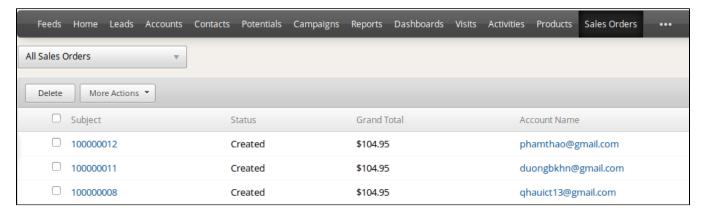
Your order # is: 100000012.

You will receive an order confirmation email with details of your order and a link to track its progress.

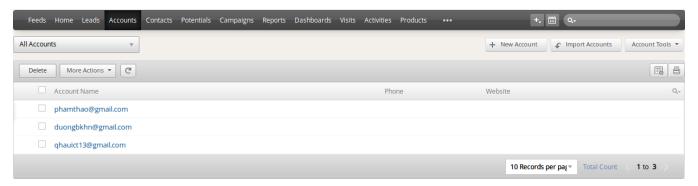
Click here to print a copy of your order confirmation.

CONTINUE SHOPPING

• In Zoho's Sales Orders



• In Zoho's Accounts



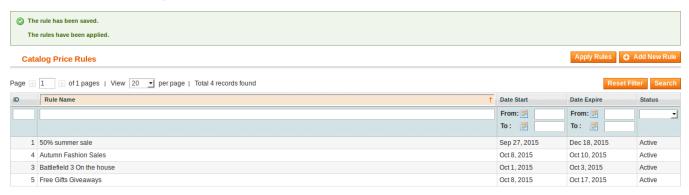
- 4. When admin add a new product in Magento, Zoho will auto sync data about that product
 - After successfully Added Mushroom Escape



• In Zoho's Products



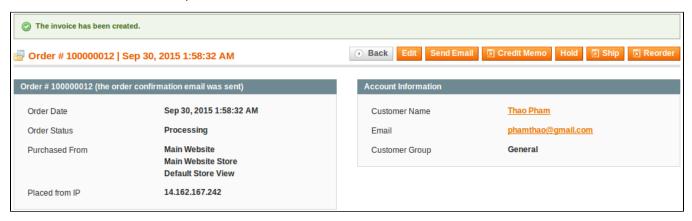
- 5. When admin add a new Promotion in Magento, Zoho will auto sync data about it as a Campaign. All editing will also be synced.
 - When Free Gift Giveaways Promotion was created



• A campaign was synced in Zoho



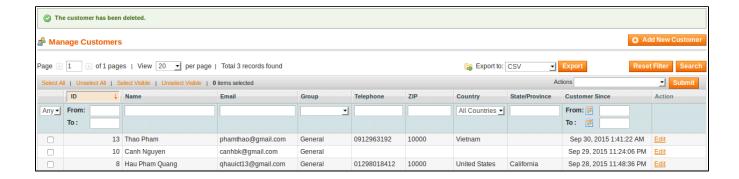
- 6. When an invoice is made by admin in Magento, **Invoice** in Zoho will be synced.
 - · When an invoice is successfully sent



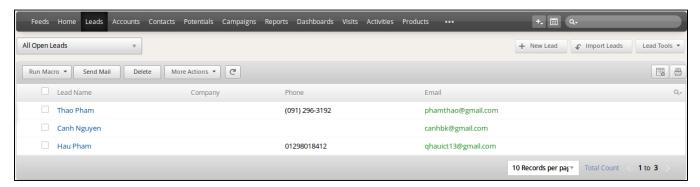
• in Zoho's Invoices

10000006				Created On : 04:44 PN
Invoice Number	: 167158400000088082			
Invoice Date	: 30/09/2015			
Due Date	:			
Grand Total	: \$104.95			
Contact Name	:			
Account Name	: phamthao@gmail.com			
Invoice Information				
	Invoice Owner	Hau Pham Change	Invoice Number	1671584000000088082
	Subject	10000006	Sales Order	
Invoice Date		30/09/2015	Purchase Order	
Due Date			Excise Duty	
Sales Commission			Status	Created
Account Name		phamthao@gmail.com	Created By	Hau Pham Wed,30 Sep 2015 04:44 PM
	Contact Name		Modified By	Hau Pham Wed,30 Sep 2015 04:44 PM

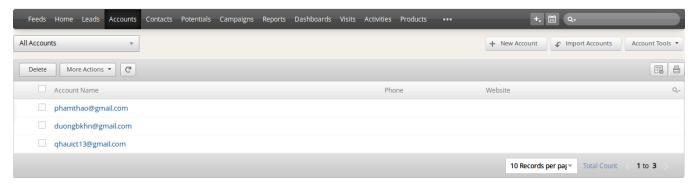
- 7. When admin deletes a customer account in Magento, that customer will also be wiped from Leads, Accounts and Contacts in Zoho.
 - Customer **Huan Dao Trong** was deleted from Magento



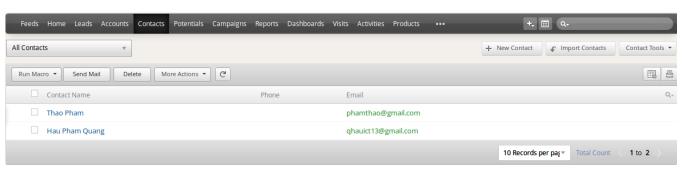
• In Zoho's Leads



• In Zoho's Accounts



• In Zoho's Contacts



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 after 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