# 2. Magento Zoho CRM Integration User Guides

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### 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=PLOgckfH7zlZslbCnBHu6KVKseSsrJsnTh)

## 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:

### # #Tue Sep 29 00:02:22 PDT 2015 AUTHTOKEN=3bd97fcc26dae3da61c9884d5ec7b9e9 RESULT=TRUE

- Method 2:

  - 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

|                      | Active Sessions  | Active Authtokens                        | Active Authtokens |                |                   |             |                      |  |  |  |
|----------------------|------------------|--|-------------------|----------------|-------------------|-------------|----------------------|--|--|--|
| Dashboard            |                  | Access and manage all the active authtol | cens of your a    | account author | ized to different | scopes.     |                      |  |  |  |
| •                    | Activity History | Remove Selected                          |                   |                |                   |             |                      |  |  |  |
| _ <b>X</b>           |                  | Token                                    | Scope             | Service        | IP Address        | Description | Last Accessed Time 🖨 |  |  |  |
| Profile              |                  | d66e5ca379fb7974fb3164b22fcfd2ef         | creatorapi        | Creator        | 113.20.118.17     | 5           | 0 Minutes(s) ago     |  |  |  |
| <b>F</b><br>Security |                  |  |                   |                |                   |             |                      |  |  |  |
| <b>Ç</b><br>Settings |                  |  |                   |                |                   |             |                      |  |  |  |
| Sessions             |                  |  |                   |                |                   |             |                      |  |  |  |

#### Filling in necessary information

|   |   | ٥                                   |
|---|---|-------------------------------------|
| qhauict13@gmail.com   | [WEBSITE]   |                                     |
| pqh2101995  | [WEBSITE]   |                                     |
| 915bb0d06bc679a5502fd9b659ba1da3<br>A Get from link "https://accounts.zoho.com/u/h#sessions | [WEBSITE]   |                                     |
| /userauthtoken" or empty box  |   |                                     |
|   |   |                                     |
| Yes   | [WEBSITE]   |                                     |
|   | qhauict13@gmail.com <ul> <li>Email of ZohoCRM</li> <li>pqh2101995</li> <li>Password of ZohoCRM</li> </ul> 915bb0d06bc679a5502td9b659ba1da3 <ul> <li>Get from link "https://accounts.zoho.com/u/h#sessions /userauthtoken" or empty box</li> </ul> Yes <ul> <li>Yes</li> <li>Yes</li></ul> | qhauict13@gmail.com       [WEBSITE] |

• 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

| Fields map         | ping managemer            | nt                                  |                |                   |             |             | Add           |
|--------------------|---------------------------|-------------------------------------|----------------|-------------------|-------------|-------------|---------------|
| Page 🕢 1           | of 3 pages   View         | 20 🚽 per page   Total 57 re         | cords found    | 🕞 Export t        | D: CSV 🗾 EX | kport Reset | Filter Search |
| Select All   Unsel | lect All   Select Visible | Unselect Visible   0 items selected |                |                   |             | Actions     | Submit        |
|                    | ID †                      | Description                         | ZohoCRM Field  | Magento Field     | Status      | Туре        | Action        |
| Any 🗾              |                           |                                     |                |                   |             |             |               |
|                    | 1                         | Customer First Name                 | First Name     | bill_firstname    | Active      | Contacts    | <u>Edit</u>   |
|                    | 3                         | Stock Quantity                      | Qty in Stock   | stock_qty         | Active      | Products    | Edit          |
|                    | 4                         | Products Description                | Description    | short_description | Active      | Products    | Edit          |
|                    | 5                         | Customer Last Name in Leads         | Last Name      | bill_lastname     | Active      | Leads       | Edit          |
|                    | 6                         | Campaign Start Date                 | Start Date     | from_date         | Active      | Campaigns   | Edit          |
|                    | 7                         | phone                               | Phone          | bill_telephone    | Active      | Leads       | Edit          |
|                    | 8                         | company                             | Company        | bill_company      | Active      | Leads       | Edit          |
|                    | 9                         | fax                                 | Fax            | bill_fax          | Active      | Leads       | Edit          |
|                    | 10                        | street                              | Street         | bill_street       | Active      | Leads       | Edit          |
|                    | 11                        | city                                | City           | bill_city         | Active      | Leads       | Edit          |
|                    | 13                        | zip code                            | Zip Code       | ship_postcode     | Active      | Leads       | Edit          |
|                    | 14                        | state                               | State          | bill_region       | Active      | Leads       | Edit          |
|                    | 15                        | fax                                 | Fax            | ship_fax          | Active      | Leads       | Edit          |
|                    | 16                        | status                              | Description    | is_active         | Active      | Leads       | Edit          |
|                    | 17                        | billing street                      | Billing Street | bill_street       | Active      | Accounts    | Edit          |
|                    | 18                        | billing city                        | Billing City   | bill_city         | Active      | Accounts    | Edit          |

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

| Export to: CSV | Export   | Reset Filter  | Search |
|----------------|----------|---------------|--------|
|                | Actions  | •             | Submit |
| Status         | Туре     | Delete        | n      |
|                | <b>T</b> | Change status |        |

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

| Add New Mapping |                           |          | Back Reset Save |
|-----------------|---------------------------|----------|-----------------|
| Rule            |                           |          |                 |
| Select Table *  | Products<br>Update Fields | <u>_</u> |                 |
| Magento field * | Name                      | •        |                 |
| Zoho field *    | Product Name (Text)       | <u> </u> |                 |
| Status *        | Active                    | <u>-</u> |                 |
| Description *   | Product Name              |          |                 |
|                 |                           |          |                 |
|                 |                           |          |                 |

- Select Table: select table that you want to sync
   Magento Field: select Magento data field
   Zoho Field: select Zoho data field
   Status: active or deactive this data field sync
   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.

| Edit Mapping    | Back Res                          | et 🕥 Delete 🥥 Save |
|-----------------|-----------------------------------|--------------------|
|                 | Are you sure you want to do this? |                    |
| Rule            |                                   |                    |
| Select Table *  | Cancel Cox                        |                    |
| Magento field * | St                                |                    |
| Zoho field *    | Description (TextArea)            |                    |
| Status *        | Active                            |                    |
| Description *   | Products Description              |                    |
|                 |                                   |                    |
|                 |                                   |                    |
|                 |                                   |                    |
|                 |                                   |                    |
|                 |                                   |                    |
|                 |                                   |                    |

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

| Dashboard Sales                | Catalog       | Customers          | Promotions          | Newsletter      | CMS         | Reports        | System        | ZohoCRM Integration | Pin      | management      | () Get l           |                | 😯 Get help          | for this page |
|--------------------------------|---------------|--------------------|---------------------|-----------------|-------------|----------------|---------------|---------------------|----------|-----------------|--------------------|----------------|---------------------|---------------|
| One or more of the Indexe      | s are not up  | to date: Product   | Attributes, Catalog | URL Rewrites, P | roduct Flat | Data, Category | Flat Data, Ca | Field Mapping       |          | , Stock Status, | Tag Aggregation Da | ata. Click her | re to go to Index I | Management    |
| and rebuild required indexes.  |               |                    |                     |                 |             |                |               | Report              |          |                 |                    |                |                     |               |
| _                              |               |                    |                     |                 |             |                |               | Retrieve Field      |          |                 |                    |                |                     |               |
| O Update Fields success !      |               |                    |                     |                 |             |                |               | Configuration       |          |                 |                    |                |                     |               |
| Fields mapping mar             | nagement      |                    |                     |                 |             |                |               |                     |          |                 |                    |                |                     | O Add         |
| Page 🔄 1 🕞 of 3 page           | es   View [   | 20 <u> </u> per pa | age   Total 57 re   | cords found     |             |                |               | 😝 E                 | Export t | D: CSV          | Export             |                | Reset Filter        | Search        |
| Select All   Unselect All   Se | elect Visible | Unselect Visible   | 0 items selected    | i               |             |                |               |                     |          |                 |                    | Actions        | <u>.</u>            | Submit        |

#### Mapping Field Template

Admins can refer to some mapping field templates below:

|      |                          |                  |                 |          | Actiona  |        |
|------|--------------------------|------------------|-----------------|----------|----------|--------|
| ID t | Description              | ZohoCRM Field    | Magento Field   | Status   | Туре     | Action |
|      |                          |                  |                 | -        | -        |        |
|      | 1 Customer First Name    | First Name       | bill_firstname  | Active   | Contacts |        |
| :    | 2 Customer Last Name     | Last Name        | bill_lastname   | Active   | Contacts |        |
|      | 3 Customer Email         | Email            | email           | Active   | Contacts |        |
| 4    | 4 Company                | Company          | bill_company    | Inactive | Leads    |        |
|      | 5 Phone number           | Phone            | bill_telephone  | Active   | Contacts |        |
|      | 6 Shipping Street        | Mailing Street   | ship_street     | Active   | Contacts |        |
|      | 7 Shipping City          | Mailing City     | ship_city       | Active   | Contacts |        |
| 1    | 8 Shipping State         | Mailing State    | ship_region     | Active   | Contacts |        |
| 1    | 9                        | Mailing Zip      | ship_postcode   | Active   | Contacts |        |
| 10   | 0                        | Mailing Country  | ship_country_id | Active   | Contacts |        |
| 1:   | 1 Accounts_Telephone     | Phone            | bill_telephone  | Active   | Accounts |        |
| 1:   | 2 Accounts_BillingStreet | Billing Street   | bill_street     | Active   | Accounts |        |
| 1:   | 3 Accounts_BillingCity   | Billing City     | bill_city       | Active   | Accounts |        |
| 14   | 4 Accounts_BillingState  | Billing State    | bill_region     | Active   | Accounts |        |
| 1    | 5 Accounts_BillingZip    | Billing Code     | bill_postcode   | Active   | Accounts |        |
| 1    | 6 Accounts_ShipStreet    | Shipping Street  | ship_street     | Active   | Accounts |        |
| 1    | 7 Accounts_ShipCity      | Shipping City    | ship_city       | Active   | Accounts |        |
| 1    | 8 Accounts_ShipState     | Shipping State   | ship_region     | Active   | Accounts |        |
| 1    | 9 Accounts_ShipZip       | Shipping Code    | ship_postcode   | Active   | Accounts |        |
| 2    | 0 Accounts_ShipCountry   | Shipping Country | ship_country_id | Active   | Accounts |        |

| Select Au   Unse | Select All   Select Visible | I Onscient visible   Viterilis selected |                |                 |          | Actions     | Submit |
|------------------|-----------------------------|---|----------------|-----------------|----------|-------------|--------|
|                  |                             | Description                             | ZohoCRM Field  | Magento Field   | Status   | Туре        | Action |
| Any              |                             |   |                |                 |          | <u> </u>    |        |
|                  | 21                          | Campaign_Name                           | Campaign Name  | name            | Active   | Campaigns   | Edit   |
|                  | 22                          | Campaign_Start                          | Start Date     | from_date       | Active   | Campaigns   | Edit   |
|                  | 23                          | Campaign_Description                    | Description    | description     | Active   | Campaigns   | Edit   |
|                  | 24                          | Leads_FirstName                         | First Name     | bill_firstname  | Active   | Leads       | Edit   |
|                  | 25                          | Leads_LastName                          | Last Name      | bill_lastname   | Active   | Leads       | Edit   |
|                  | 26                          | Leads_Email                             | Email          | email           | Active   | Leads       | Edit   |
|                  | 27                          | Leads_Phone                             | Phone          | telephone       | Active   | Leads       | Edit   |
|                  | 28                          | Leads_BillingStreet                     | Street         | bill_street     | Active   | Leads       | Edit   |
|                  | 29                          | Leads_BillingCity                       | City           | bill_city       | Active   | Leads       | Edit   |
|                  | 30                          | Leads_BillingState                      | State          | bill_region     | Active   | Leads       | Edit   |
|                  | 31                          | Leads_BillingZip                        | Zip Code       | bill_postcode   | Active   | Leads       | Edit   |
|                  | 32                          | Leads_BillingCountry                    | Country        | bill_country_id | Inactive | Leads       | Edit   |
|                  | 33                          | Products_Name                           | Product Name   | name            | Active   | Products    | Edit   |
|                  | 34                          | Products_SKU                            | Product Code   | sku             | Active   | Products    | Edit   |
|                  | 35                          | Product_Description                     | Description    | description     | Active   | Products    | Edit   |
|                  | 37                          | SalesOrder_AccountName                  | Account Name   | customer_email  | Active   | SalesOrders | Edit   |
|                  | 38                          | SalesOrder_BillingStreet                | Billing Street | bill_street     | Active   | SalesOrders | Edit   |
|                  | 39                          | SalesOrder_BillingCity                  | Billing City   | bill_city       | Active   | SalesOrders | Edit   |
|                  | 40                          | SalesOrder_BIIIngState                  | Billing State  | bill_region     | Active   | SalesOrders | Edit   |
|                  | 41                          | SalesOrder_BillingZip                   | Billing Code   | bill_postalcode | Active   | SalesOrders | Edit   |

| ect All   Uns    | elect All   Select Visible | Unselect Visible   0 items selected |                  |                 |        | Actions     | _ Subm |
|------------------|----------------------------|-------------------------------------|------------------|-----------------|--------|-------------|--------|
|                  | ID t                       | Description                         | ZohoCRM Field    | Magento Field   | Status | Туре        | Action |
| у <mark>т</mark> |                            |                                     |                  |                 | 1      | 1           |        |
|                  | 42                         | SalesOrder_Date                     | Due Date         | created_at      | Active | SalesOrders | Edit   |
|                  | 43                         | SalesOrder_ShipStreet               | Shipping Street  | ship_street     | Active | SalesOrders | Edit   |
|                  | 44                         | SalesOrder_ShipCity                 | Shipping City    | ship_city       | Active | SalesOrders | Edit   |
|                  | 45                         | SalesOrder_ShipState                | Shipping State   | ship_region     | Active | SalesOrders | Edit   |
|                  | 46                         | SalesOrder_ShipZip                  | Shipping Code    | ship_postalcode | Active | SalesOrders | Edit   |
|                  | 47                         | SalesOrder_Total                    | Sales Total      | grand_total     | Active | SalesOrders | Edit   |
|                  | 48                         | Invoices_OrderID                    | Sales Order      | order_id        | Active | Invoices    | Edit   |
|                  | 49                         | Invoices_InvoiceDate                | Invoice Date     | created_at      | Active | Invoices    | Edit   |
|                  | 50                         | Invoices_AccountName                | Account Name     | entity_id       | Active | Invoices    | Edit   |
|                  | 51                         | Invoices_Total                      | Sales Commission | grand_total     | Active | Invoices    | Edit   |
|                  | 52                         | Invoices_BillingStreet              | Billing Street   | bill_street     | Active | Invoices    | Edit   |
|                  | 53                         | Invoices_BillingCity                | Billing City     | bill_city       | Active | Invoices    | Edit   |
|                  | 54                         | Invoices_BillingState               | Billing State    | bill_region     | Active | Invoices    | Edit   |
|                  | 55                         | INvoices_BillingZip                 | Billing Code     | bill_postalcode | Active | Invoices    | Edit   |
|                  | 56                         | Invoices_ShipStreet                 | Shipping Street  | ship_street     | Active | Invoices    | Edit   |
|                  | 57                         | Invoices_ShipCity                   | Shipping City    | ship_city       | Active | Invoices    | Edit   |
|                  | 58                         | Invoices_ShipState                  | Shipping State   | ship_region     | Active | Invoices    | Edit   |
|                  | 59                         | INvoices_ShipZip                    | Shipping Code    | ship_postalcode | Active | Invoices    | Edit   |
|                  | 60                         | Account_AccountName                 | Account Name     | email           | Active | Accounts    | Edit   |
|                  | 61                         | Contacts_Name                       | Account Name     | email           | Active | Contacts    | Edit   |

| Page 🖪 🕘          | e 🛛 4 📄 of 4 pages   View 20 🚽 per page   Total 65 records found 🕞 Export to: CSV 🚽 Export Reset Filter Search |   |                |                    |          |             |        |  |  |  |  |  |
|-------------------|--|---|----------------|--------------------|----------|-------------|--------|--|--|--|--|--|
| Select All   Unse | elect All   Select Visible   | e   Unselect Visible   0 items selected |                |                    |          | Actions     | Submit |  |  |  |  |  |
|                   | ID †   | Description                             | ZohoCRM Field  | Magento Field      | Status   | Туре        | Action |  |  |  |  |  |
| Any               |  |   |                |                    | <u> </u> |             |        |  |  |  |  |  |
|                   | 62   | SalesOrder_CustomerEmail                | Customer Email | customer_email     | Active   | SalesOrders | Edit   |  |  |  |  |  |
|                   | 63   | SalesOrder_FirstName                    | First Name     | customer_firstname | Active   | SalesOrders | Edit   |  |  |  |  |  |
|                   | 64   |   | Last Name      | customer_lastname  | Active   | SalesOrders | Edit   |  |  |  |  |  |
|                   | 65   | Product_Name                            | Product Code   | sku                | Active   | Products    | Edit   |  |  |  |  |  |
|                   | 66   | SalesOrder_Phone                        | Phone          | bill_telephone     | Active   | SalesOrders | Edit   |  |  |  |  |  |
|                   |  |   |                |                    |          |             |        |  |  |  |  |  |

## 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

| Feeds Ho                                      | me Leads                         | Accounts | Contacts | Potentials | Campaigns | Reports | Dashboards | Visits | Activities | Products | ••• |
|---|----------------------------------|----------|----------|------------|-----------|---------|------------|--------|------------|----------|-----|
| All Open Leads                                | All Open Leads                   |          |          |            |           |         |            |        |            |          |     |
| Run Macro 🔹 Send Mail Delete More Actions 🔹 C |                                  |          |          |            |           |         |            |        |            |          |     |
| 🗆 Lea   | d Name                           |          |          | Cor        | mpany     |         | Phone      |        |            | Emai     | il  |
| 🗆 Tha   | Thao Pham     phamthao@gmail.com |          |          |            |           |         |            |        |            |          |     |

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

• After successfully editing information

| ADDRESS BOOK   | ADD NEW ADDRESS  |
|--|--|
| The address has been saved.  |  |
| DEFAULT ADDRESSES  | ADDITIONAL ADDRESS ENTRIES                                   |
| DEFAULT BILLING ADDRESS  | You have no additional address entries in your address book. |
| Thao Pham<br>95 Alley, Chua Boc Str.<br>Hanoi, 10000<br>Vietnam<br>T: 0912963192 |  |
| Change Billing Address   |  |

#### • In Zoho's Contacts

| Address Information |                         |                | Locate Map |
|---------------------|-------------------------|----------------|------------|
| Mailing Street:     | 95 Alley, Chua Boc Str. | Other Street:  |            |
| Mailing City:       | Hanoi                   | Other City:    |            |
| Mailing State:      |                         | Other State:   |            |
| Mailing Zip:        | 10000                   | Other Zip:     |            |
| Mailing Country:    | Vietnam                 | Other Country: |            |

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: 10000012.

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

| Feeds       | Home    | Leads     | Accounts | Contacts | Potentials | Campaigns | Reports  | Dashboards | Visits | Activities | Products   | Sales Orders |  |
|-------------|---------|-----------|----------|----------|------------|-----------|----------|------------|--------|------------|------------|--------------|--|
| All Sales C | Orders  |           | V        |          |            |           |          |            |        |            |            |              |  |
| Delete      | More    | e Actions | •        |          |            |           |          |            |        |            |            |              |  |
|             | Subject |           |          | S        | itatus     |           | Grand T  | otal       |        | Ac         | count Name | 2            |  |
|             | 1000000 | )12       |          | C        | reated     |           | \$104.95 |            |        | ph         | amthao@g   | gmail.com    |  |
|             | 1000000 | 011       |          | C        | reated     |           | \$104.95 |            |        | du         | iongbkhn@  | gmail.com    |  |
|             | 1000000 | 008       |          | C        | reated     |           | \$104.95 |            |        | qh         | auict13@g  | mail.com     |  |

#### • In Zoho's Accounts

| Feeds      | Home Leads    | Accounts | Contacts | Potentials | Campaigns | Reports | Dashboards | Visits | Activities | Products | ••• | +, 🗐 Q.              |                      |            |
|------------|---------------|----------|----------|------------|-----------|---------|------------|--------|------------|----------|-----|----------------------|----------------------|------------|
| All Accour | nts           | Ŧ        |          |            |           |         |            |        |            |          |     | + New Account        | ort Accounts Accourt | nt Tools 💌 |
| Delete     | More Actions  | • C      |          |            |           |         |            |        |            |          |     |                      |                      | 88         |
|            | Account Name  |          |          |            |           |         |            |        | Phon       | e        |     | Website              |                      | Q,-        |
|            | phamthao@gma  | ail.com  |          |            |           |         |            |        |            |          |     |                      |                      |            |
|            | duongbkhn@gm  | nail.com |          |            |           |         |            |        |            |          |     |                      |                      |            |
|            | qhauict13@gma | il.com   |          |            |           |         |            |        |            |          |     |                      |                      |            |
|            |               |          |          |            |           |         |            |        |            |          |     | 10 Records per pa{ ▼ | Total Count          | з .>       |

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

After successfully Added Mushroom Escape

| 🕑 Th     | S The product has been saved.  |                 |                   |                  |        |         |        |                    |         |             |  |  |
|----------|--|-----------------|-------------------|------------------|--------|---------|--------|--------------------|---------|-------------|--|--|
| 🇐 Mar    | S Manage Products  |                 |                   |                  |        |         |        |                    |         |             |  |  |
| Page 📧   | age 🗉 1 🗈 of 1 pages   View 20 🚽 per page   Total 7 records found   🚮 Notify Low Stock RSS Reset Filter Search |                 |                   |                  |        |         |        |                    |         |             |  |  |
| Select A | Select All   Unselect Visible   Unselect Visible   0 items selected Actions - Submit                           |                 |                   |                  |        |         |        |                    |         |             |  |  |
|          | ID ↓   | Name            | Туре              | Attrib. Set Name | SKU    | Price   | Qty    | Visibility         | Status  | Action      |  |  |
| Any 🕶    | From:  |                 |                   |                  |        | From:   | From:  | -                  | -       |             |  |  |
|          | To :   |                 |                   |                  |        | То:     | To :   |                    |         |             |  |  |
|          |  |                 |                   |                  |        | In: USD | Ŀ      |                    |         |             |  |  |
|          | 10   | Mushroom Escape | Simple<br>Product | Default          | me1023 | \$600.0 | 0 6000 | Catalog,<br>Search | Enabled | <u>Edit</u> |  |  |

#### • In Zoho's Products

| Fe | eds <u>Home</u> | Leads  | Accounts   | Contacts | Potentials | Campaigns | Reports | Dashboards | Visits | Activities | Products | Sales Orders | •••        |
|----|-----------------|--------|------------|----------|------------|-----------|---------|------------|--------|------------|----------|--------------|------------|
| •  | Edit            | Delete | Clone      | More A   | ctions 💌   | *.        |         |            |        |            |          |              |            |
| -  | Mushro          | oom E  | Escape     | - me102  | .3         |           |         |            |        |            |          | Last Update  | : 04:19 PM |
|    | Product Cat     | egory  | :          |          |            |           |         |            |        |            |          |              |            |
|    | Unit Price      |        | : \$600.00 |          |            |           |         |            |        |            |          |              |            |
|    | Vendor Nan      | ne     | :          |          |            |           |         |            |        |            |          |              |            |
|    | Qty Ordered     | ł      | : 0.0      |          |            |           |         |            |        |            |          |              |            |
|    | Qty in Stock    |        | : 6000     |          |            |           |         |            |        |            |          |              |            |

#### 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

| © The<br>The | rule has been saved.<br>rules have been applied.          |              |              |                 |
|--------------|---|--------------|--------------|-----------------|
| Cata         | log Price Rules   |              | Apply Rules  | Add New Rule    |
| Page 📧       | 1 of 1 pages   View 20 💌 per page   Total 4 records found |              | Rese         | t Filter Search |
| ID           | Rule Name t   | Date Start   | Date Expire  | Status          |
|              |   | From: 📰      | From: 📰      |                 |
|              |   | То: 📰        | То: 📰        |                 |
| 1            | 50% summer sale   | Sep 27, 2015 | Dec 18, 2015 | Active          |
| 4            | Autumn Fashion Sales                                      | Oct 8, 2015  | Oct 10, 2015 | Active          |
| 3            | Battlefield 3 On the house                                | Oct 1, 2015  | Oct 3, 2015  | Active          |
| 5            | Free Gifts Giveaways                                      | Oct 8, 2015  | Oct 17, 2015 | Active          |

#### • A campaign was synced in Zoho

| Feeds Home Leads Accounts Contacts Potentials | Campaigns Reports Dashboards | Visits Activities Products ••• | +, 🗎 Q.          |                 |
|---|------------------------------|--------------------------------|------------------|-----------------|
| All Campaigns 🔹                               |                              |                                | + New Campaign C | ampaign Tools 🔻 |
| Delete More Actions 💌                         |                              |                                |                  | 88              |
| Campaign Name                                 | Туре                         | Status Start Date              | End Date         | Q,-             |
| Free Gifts Giveaways                          |                              | 08/10/2015                     | 17/10/2015       |                 |

#### 6. When an invoice is made by admin in Magento, \*\*Invoice\*\* in Zoho will be synced.

• When an invoice is successfully sent

| The invoice has been created and the invoice has been created a | The invoice has been created.            |                     |   |  |  |  |  |  |  |  |  |  |
|---|--|---------------------|---|--|--|--|--|--|--|--|--|--|
| 🖷 Order # 100000012   9   | Sep 30, 2015 1:58:32 AM                  | Back Edit Send Em   | ail 🗊 Credit Memo 🛛 Hold 🗊 Ship 👼 Reorder |  |  |  |  |  |  |  |  |  |
| Order # 100000012 (the ord  | er confirmation email was sent)          | Account Information |   |  |  |  |  |  |  |  |  |  |
| Order Date  | Sep 30, 2015 1:58:32 AM                  | Customer Name       | Thao Pham                                 |  |  |  |  |  |  |  |  |  |
| Order Status  | Processing                               | Email               | phamthao@gmail.com                        |  |  |  |  |  |  |  |  |  |
| Purchased From  | Main Website                             | Customer Group      | General                                   |  |  |  |  |  |  |  |  |  |
|   | Main Website Store<br>Default Store View |                     |   |  |  |  |  |  |  |  |  |  |
| Placed from IP  | 14.162.167.242                           |                     |   |  |  |  |  |  |  |  |  |  |

• in Zoho's Invoices

| 10000006          |               |                    |                | Created On : 04:44 PM                |
|-------------------|---------------|--------------------|----------------|--------------------------------------|
| Invoice Number    | : 16715840000 | 000088082          |                |                                      |
| Invoice Date      | : 30/09/2015  |                    |                |                                      |
| Due Date          | :             |                    |                |                                      |
| Grand Total       | : \$104.95    |                    |                |                                      |
| Contact Name      | :             |                    |                |                                      |
| Account Name      | : phamthao@   | gmail.com          |                |                                      |
| ***               |               |                    |                |                                      |
| Invoice Informati | ion           |                    |                |                                      |
| Ir                | nvoice Owner  | Hau Pham Change    | Invoice Number | 167158400000088082                   |
|                   | Subject       | 10000006           | Sales Order    |                                      |
|                   | Invoice Date  | 30/09/2015         | Purchase Order |                                      |
|                   | Due Date      |                    | Excise Duty    |                                      |
| Sales             | Commission    |                    | Status         | Created                              |
| A                 | ccount Name   | phamthao@gmail.com | Created By     | Hau Pham<br>Wed,30 Sep 2015 04:44 PM |
| c                 | ontact Name   |                    | Modified By    | Hau Pham<br>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

| 📀 Th     | The customer has been deleted.  |                                      |                     |         |             |       |                 |                |                          |        |  |  |  |
|----------|---|--------------------------------------|---------------------|---------|-------------|-------|-----------------|----------------|--------------------------|--------|--|--|--|
| 📥 Ma     | Add New Customers   |                                      |                     |         |             |       |                 |                |                          |        |  |  |  |
| Page 🔄   | age 🗈 1 💿 of 1 pages   View 20 🝷 per page   Total 3 records found 🙀 Export to: CSV 🝷 Export |                                      |                     |         |             |       |                 |                |                          |        |  |  |  |
| Select A | NI   Unselect All   S   | elect Visible   Unselect Visible   0 | items selected      |         |             |       |                 | Ac             | tions                    | Submit |  |  |  |
|          | ID 🕴  | Name                                 | Email               | Group   | Telephone   | ZIP   | Country         | State/Province | Customer Since           | Action |  |  |  |
| Any -    | From:   |                                      |                     | -       |             |       | All Countries - |                | From: 📰                  |        |  |  |  |
|          | To :  |                                      |                     |         |             |       |                 |                | То: 🗾                    |        |  |  |  |
|          | 13  | Thao Pham                            | phamthao@gmail.com  | General | 0912963192  | 10000 | Vietnam         |                | Sep 30, 2015 1:41:22 AM  | Edit   |  |  |  |
|          | 10  | Canh Nguyen                          | canhbk@gmail.com    | General |             |       |                 |                | Sep 29, 2015 11:24:06 PM | Edit   |  |  |  |
|          | 8   | Hau Pham Quang                       | qhauict13@gmail.com | General | 01298018412 | 10000 | United States   | California     | Sep 28, 2015 11:48:36 PM | Edit   |  |  |  |

#### • In Zoho's Leads

| Feeds Home Leads Account | ts Contacts Potentials Campaigns | Reports Dashboards Visits | s Activities Products ••• | +, 🗎 Q,                                   |
|--------------------------|----------------------------------|---------------------------|---------------------------|---|
| All Open Leads           | •                                |                           |                           | + New Lead V Import Leads Lead Tools -    |
| Run Macro 👻 Send Mail    | Delete More Actions 👻 🤇 Cf       |                           |                           | <b>a</b>                                  |
| Lead Name                | Company                          | Phone                     | Email                     | Q,+                                       |
| Thao Pham                |                                  | (091) 296-3192            | phamthao@gmail.com        |   |
| Canh Nguyen              |                                  |                           | canhbk@gmail.com          |   |
| Hau Pham                 |                                  | 01298018412               | qhauict13@gmail.com       |   |
|                          |                                  |                           |                           | 10 Records per pa{ Total Count < 1 to 3 > |

#### • In Zoho's Accounts

| Feeds      | Home Leads   | Accounts | Contacts | Potentials | Campaigns | Reports | Dashboards | Visits | Activities | Products | ••• | +,            | iii م <del>.</del>  |                 |
|------------|--------------|----------|----------|------------|-----------|---------|------------|--------|------------|----------|-----|---------------|---------------------|-----------------|
| All Accour | nts          | Ŧ        |          |            |           |         |            |        |            |          |     | + New Account | Import Accounts     | Account Tools 💌 |
| Delete     | More Actions | 5 • C    |          |            |           |         |            |        |            |          |     |               |                     |                 |
|            | Account Name |          |          |            |           |         |            |        | Pho        | ne       |     | Website       |                     | Q,-             |
|            | phamthao@gn  | nail.com |          |            |           |         |            |        |            |          |     |               |                     |                 |
|            | duongbkhn@g  | mail.com |          |            |           |         |            |        |            |          |     |               |                     |                 |
|            | qhauict13@gm | ail.com  |          |            |           |         |            |        |            |          |     |               |                     |                 |
|            |              |          |          |            |           |         |            |        |            |          |     | 10 Records    | oer pa{ Total Count | < 1 to 3>       |

#### • In Zoho's Contacts

| Feeds Home Leads Accounts Contac | ts Potentials Campaigns Reports Dashboard | ls Visits Activities Products ••• | +. 🗎 Q.  |
|----------------------------------|---|-----------------------------------|--|
| All Contacts v                   |   |                                   | + New Contact  for Import Contacts Contact Tools |
| Run Macro 🔻 Send Mail Delete     | More Actions 🔹 🤇 🥙                        |                                   |  |
| Contact Name                     | Phone                                     | Email                             | Q <sub>v</sub>                                   |
| Thao Pham                        |   | phamthao@gmail.com                |  |
| Hau Pham Quang                   |   | qhauict13@gmail.com               |  |
|                                  |   |                                   | 10 Records per pag * Total Count < 1 to 2 >      |

# 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 ٠ 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