

Woocommerce Zoho CRM Integration

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this document, do not hesitate to leave us an email via our email address below.

Created: 01/17/2017 | By: Magenest | Support Portal: <http://servicedesk.izysync.com/servicedesk/customer/portal/109>

Introducing to Woocommerce ZohoCRM integration

The Woocommerce ZohoCRM integration Plugin is an indispensable tool to help you synchronize data instantly between Woocommerce and ZohoCRM. The plugin allows to synchronize register customers in Woocommerce to Lead in ZohoCRM, order in Woocommerce to Account and Contact in ZohoCRM. Admin can define mapping fields between Woocommerce and ZohoCRM

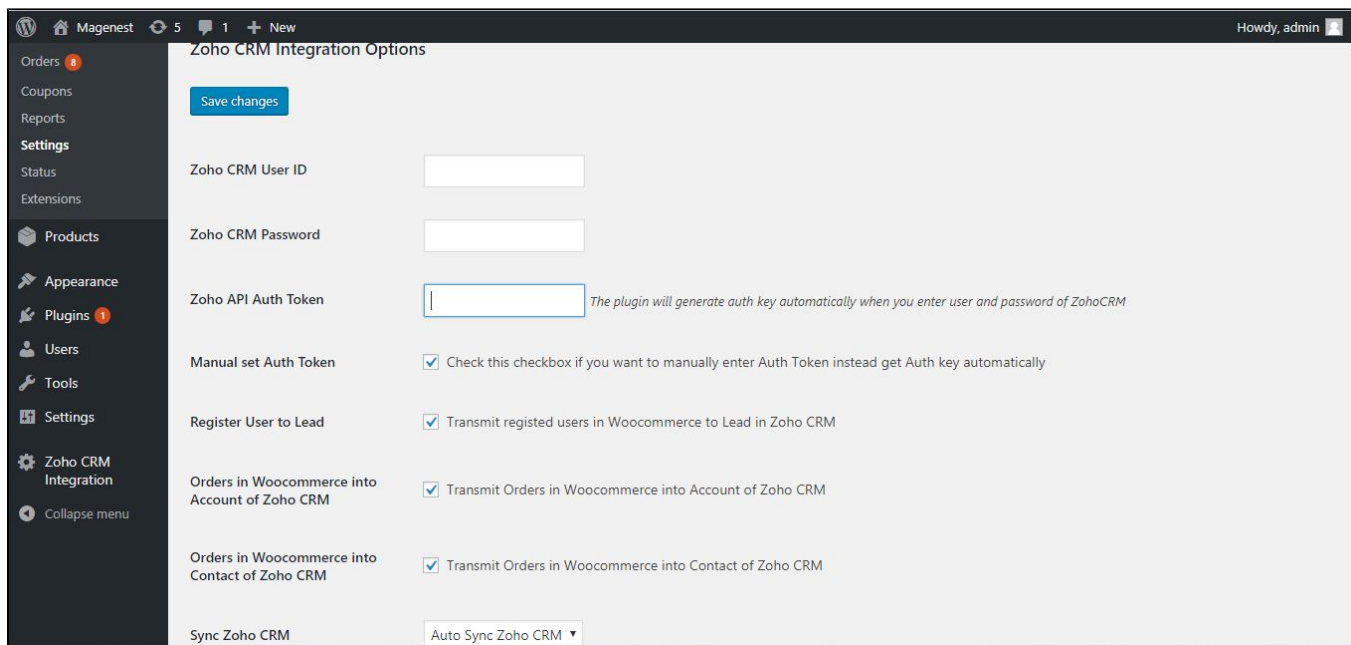
Features:

- Synchronize register customer of Woocommerce to Lead/Accounts/Contacts in ZohoCRM
- Synchronize Billing details/Shipping details in Order of Woocommerce to Lead/Accounts/Contacts in ZohoCRM
- Synchronize Order of Woocommerce to Invoices/Sales Orders/Purchase Orders in ZohoCRM
- KB
- Fields Mapping settings
- Report of synchronized data between Woocommerce and ZohoCRM
- Synchronize Woocommerce to Zoho CRM manually
- Report of synchronized data error between Woocommerce and Zoho CRM and resend

Configuration

- [Config connect to Zoho CRM](#)

You can access configuration page by clicking **Settings** of **Woocommerce**, then click **ZohoCRM integration** tab



The screenshot shows the 'Zoho CRM Integration Options' page in the Woocommerce admin dashboard. The left sidebar contains navigation links: Orders, Coupons, Reports, Settings, Status, Extensions, Products, Appearance, Plugins, Users, Tools, Settings, Zoho CRM Integration, and Collapse menu. The main content area is titled 'Zoho CRM Integration Options' and includes a 'Save changes' button at the top left. The settings are organized into sections: 'Zoho CRM User ID' and 'Zoho CRM Password' are text input fields. 'Zoho API Auth Token' is a text input field with a note: 'The plugin will generate auth key automatically when you enter user and password of ZohoCRM'. Below this is a checkbox for 'Manual set Auth Token' with the description 'Check this checkbox if you want to manually enter Auth Token instead get Auth key automatically'. There are three checkboxes for mapping: 'Register User to Lead' (Transmit registered users in Woocommerce to Lead in Zoho CRM), 'Orders in Woocommerce into Account of Zoho CRM' (Transmit Orders in Woocommerce into Account of Zoho CRM), and 'Orders in Woocommerce into Contact of Zoho CRM' (Transmit Orders in Woocommerce into Contact of Zoho CRM). At the bottom, there is a 'Sync Zoho CRM' section with a dropdown menu set to 'Auto Sync Zoho CRM'.

Zoho server: choose server which you are using

Mail ID: fill your email

Zoho password: Fill your zoho's password

Zoho api auth token: Auto get if your user and password is invalid

Sync Zoho CRM: Select auto sync or Manual sync

Duplicate: Select action when duplicate occur

- Add to Sync error: Add to Sync error table and not override the duplicate record
- Update the duplicate record: Override the duplicate record

Final you click "Save changes" button.

Notice: If Zoho API Auth Token isn't filled, you should check again your zoho's mail and password. This is very important, can not be synchronized without the Zoho API

[Config fields mapping](#)

To access Fields mapping page, hover mouse **Zoho CRM Integration** tab -> click **Fields Mapping settings**

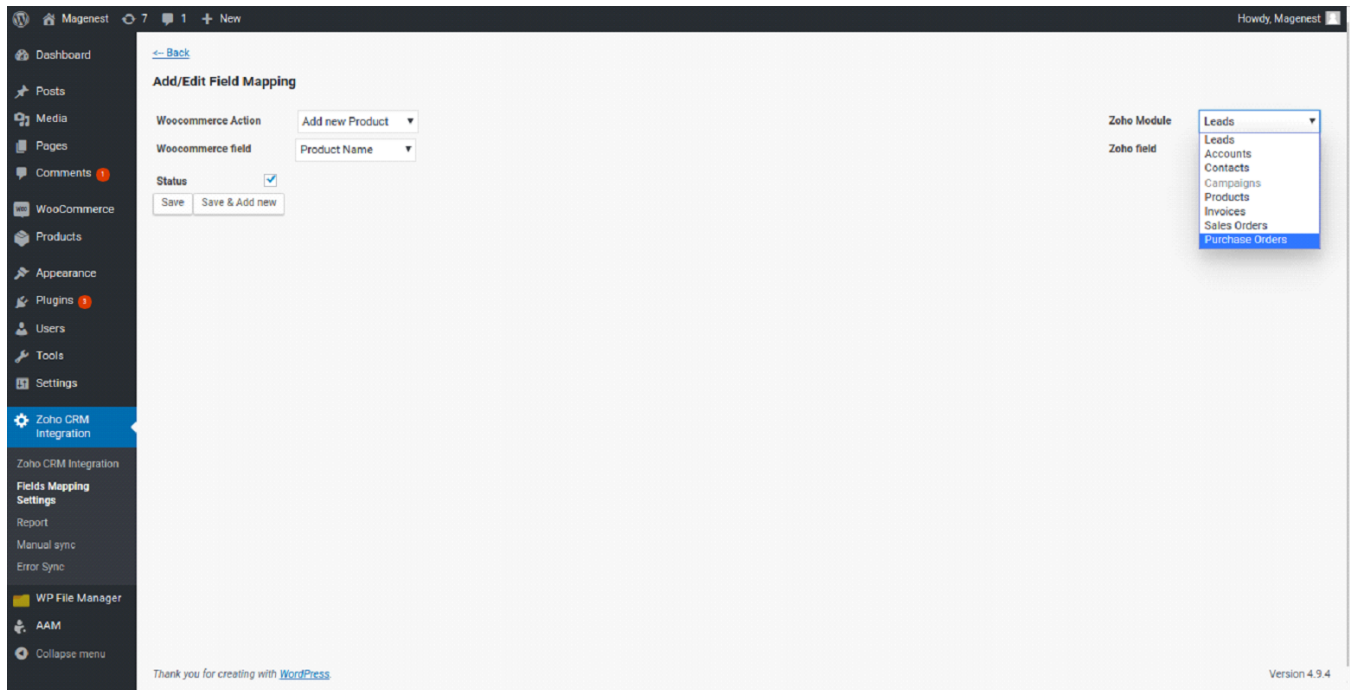
Label	Woocommerce Side	ZohoCRM Side	Enable
Title		new customer	☐
Phone	Shipping Phone	->Phone	☒
Mobile	Shipping Phone	->Mobile	☒
Company	Shipping Company	-> Company	☒
Street	Shipping Street	-> Street	☒
City	Shipping City	-> City	☒
State	Shipping State	-> State	☒
Zipcode	Shipping Zipcode	-> Zipcode	☒
Country	Shipping Company	-> Country	☒
Description		ccc	☒

Fields Mapping for Account of ZohoCRM

Contact Mapping Setting

Submit

To add new field mapping, click "Add new" button:



Address Information

Locate Map

Billing Street	Ha Noi	Shipping Street
Billing City	Ha Noi	Shipping City
Billing State		Shipping State
Billing Code		Shipping Code
Billing Country	VN	Shipping Country

Product Details

#	Product Details	List Price (VND)	Quantity	Amount (VND)	Discount (VND)	Tax (VND)	Total (VND)
1	Woo Single #2	2.00	1	2.00	0.00	0.00	0.00

Sub Total VND 0.00
Discount VND 0.00

There are 3 actions in Woocommerce can sync to Zoho:

- When create new user
- When create new product
- When create new order

You can choose many of all fields which you want

There are 7 modules in Zoho can sync to: Leads, Accounts, Contacts, Invoices, Sales Orders Purchase Orders, Products with all fields.

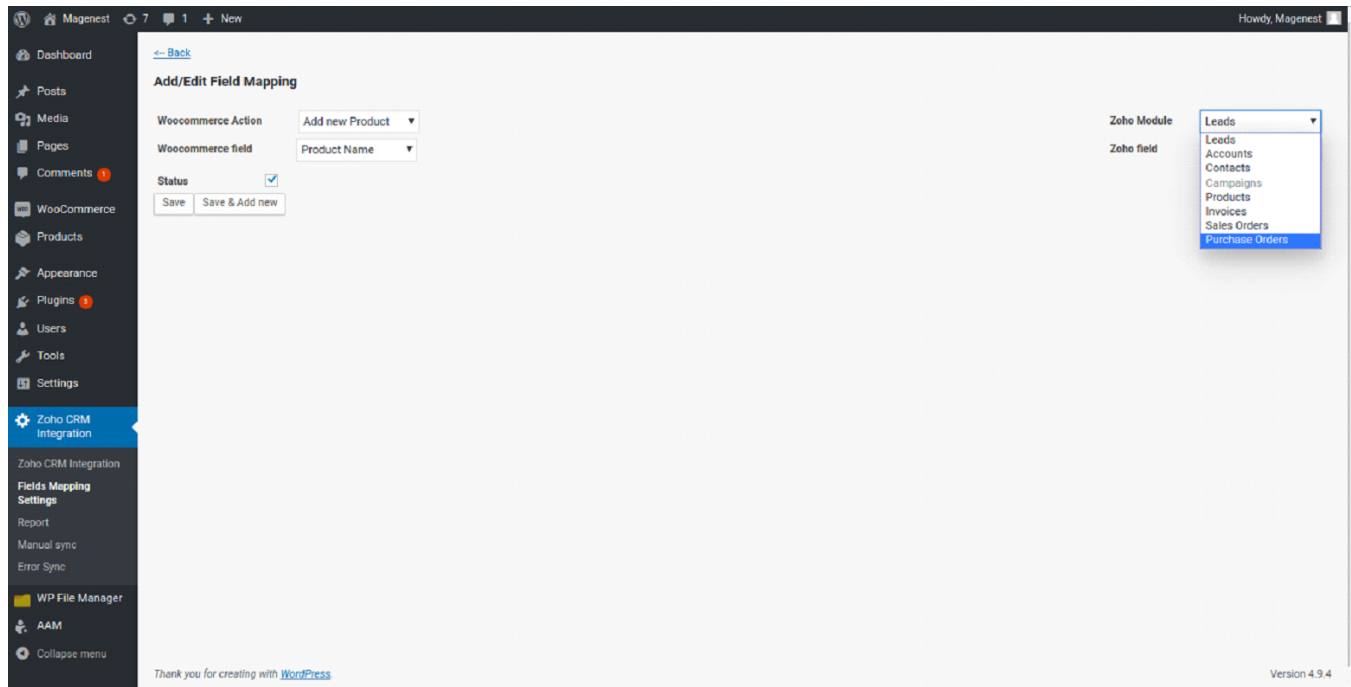
Finally, click **Save** button and **Save & Add new** button.

Notices:

- You need to pay attention to the required fields of Zoho. You can refer to the following link: <https://www.zoho.com/crm/help/api/modules-fields.html>
- When the order is synchronized, the product which is bought must be synchronized before that. So you should have some fields to sync both Order and Product

Report table

To access Report page, hover on the Zoho CRM Integration tab -> click Report



Sat, 10 Feb 2018 07:50 AM

Sat, 10 Feb 2018 07:50 AM

Address Information

Locate Map

Billing Street	Ha Noi	Shipping Street
Billing City	Ha Noi	Shipping City
Billing State		Shipping State
Billing Code		Shipping Code
Billing Country	VN	Shipping Country

Product Details

#	Product Details	List Price (VND)	Quantity	Amount (VND)	Discount (VND)	Tax (VND)	Total (VND)
1	Woo Single #2	2.00	1	2.00	0.00	0.00	0.00

Sub Total VND 0
Discount VND 0.00

4. Manual sync

When you select Synchronize mode manually, the record will be inserted here.

7

1

New

Magenest

Howdy, Magenest

Dashboard

Posts

Media

Pages

Comments

WooCommerce

Products

Appearance

Plugins

Users

Tools

Settings

Zoho CRM Integration

Zoho CRM Integration

Fields Mapping

Settings

Report

Manual sync

Error Sync

WP File Manager

AAM

Collapse menu

← Back

Add/Edit Field Mapping

WooCommerce ActionAdd new Product

WooCommerce fieldProduct Name

Status☒

SaveSave & Add new

Zoho ModuleLeads

Zoho fieldLeadsAccountsContactsCampaignsProductsInvoicesSales OrdersPurchase Orders

Thank you for creating with WordPress

Version 4.9.4

Sat, 10 Feb 2018 07:50 AM

Sat, 10 Feb 2018 07:50 AM

Address Information

Locate Map

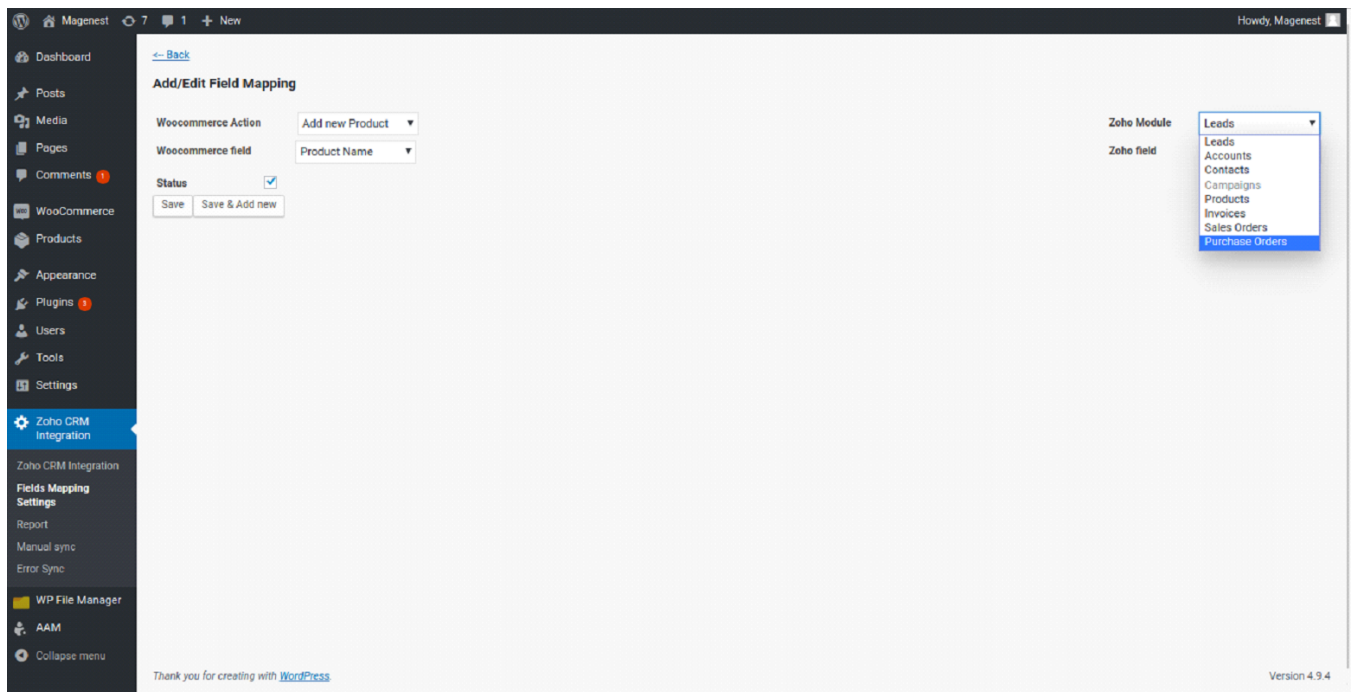
Billing Street	Ha Noi	Shipping Street
Billing City	Ha Noi	Shipping City
Billing State		Shipping State
Billing Code		Shipping Code
Billing Country	VN	Shipping Country

Product Details

#	Product Details	List Price (VND)	Quantity	Amount (VND)	Discount (VND)	Tax (VND)	Total (VND)
1	Woo Single #2	2.00	1	2.00	0.00	0.00	0.00

Sub Total VND 0
Discount VND 0.00

5. Sync error



Address Information

Locate Map

Billing Street	Ha Noi	Shipping Street
Billing City	Ha Noi	Shipping City
Billing State		Shipping State
Billing Code		Shipping Code
Billing Country	VN	Shipping Country

Product Details

#	Product Details	List Price (VND)	Quantity	Amount (VND)	Discount (VND)	Tax (VND)	Total (VND)
1	Woo Single #2	2.00	1	2.00	0.00	0.00	0.00

Sub Total VND 0
Discount VND 0.00

3. Demo sync Order in Wooc to Invoices in Zoho
Order in Wooc:

Dashboard

Posts

Media

Pages

Comments

WooCommerce

Products

Appearance

Plugins

Users

Tools

Settings

Zoho CRM Integration

Zoho CRM Integration

Fields Mapping

Settings

Report

Manual sync

Error Sync

WP File Manager

AAM

Collapse menu

← Back

Add/Edit Field Mapping

WooCommerce ActionAdd new Product

WooCommerce fieldProduct Name

Status☒

SaveSave & Add new

Zoho ModuleLeads

Zoho fieldLeads

Accounts

Contacts

Campaigns

Products

Invoices

Sales Orders

Purchase Orders

Thank you for creating with WordPress

Version 4.9.4

Sat, 10 Feb 2018 07:50 AM

Sat, 10 Feb 2018 07:50 AM

Address Information

Locate Map

Billing Street	Ha Noi	Shipping Street
Billing City	Ha Noi	Shipping City
Billing State		Shipping State
Billing Code		Shipping Code
Billing Country	VN	Shipping Country

Product Details

#	Product Details	List Price (VND)	Quantity	Amount (VND)	Discount (VND)	Tax (VND)	Total (VND)
1	Woo Single #2	2.00	1	2.00	0.00	0.00	0.00

Sub Total VND 0
Discount VND 0.00

Invoice in Zoho:

Dashboard

Posts

Media

Pages

Comments

WooCommerce

Products

Appearance

Plugins

Users

Tools

Settings

Zoho CRM Integration

Zoho CRM Integration

Fields Mapping

Settings

Report

Manual sync

Error Sync

WP File Manager

AAM

Collapse menu

Howdy, Magenest

71New

← Back

Add/Edit Field Mapping

WooCommerce ActionAdd new Product

WooCommerce fieldProduct Name

Status☒

SaveSave & Add new

Zoho ModuleLeads

Zoho fieldLeadsAccountsContactsCampaignsProductsInvoicesSales OrdersPurchase Orders

Thank you for creating with WordPress

Version 4.9.4

Sat, 10 Feb 2018 07:50 AM

Sat, 10 Feb 2018 07:50 AM

Address Information

Locate Map

Billing Street	Ha Noi	Shipping Street
Billing City	Ha Noi	Shipping City
Billing State		Shipping State
Billing Code		Shipping Code
Billing Country	VN	Shipping Country

Product Details

#	Product Details	List Price (VND)	Quantity	Amount (VND)	Discount (VND)	Tax (VND)	Total (VND)
1	Woo Single #2	2.00	1	2.00	0.00	0.00	0.00

Sub Total VND 0

Discount VND 0.00