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@magenest.com, we will be happy to assist.

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

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
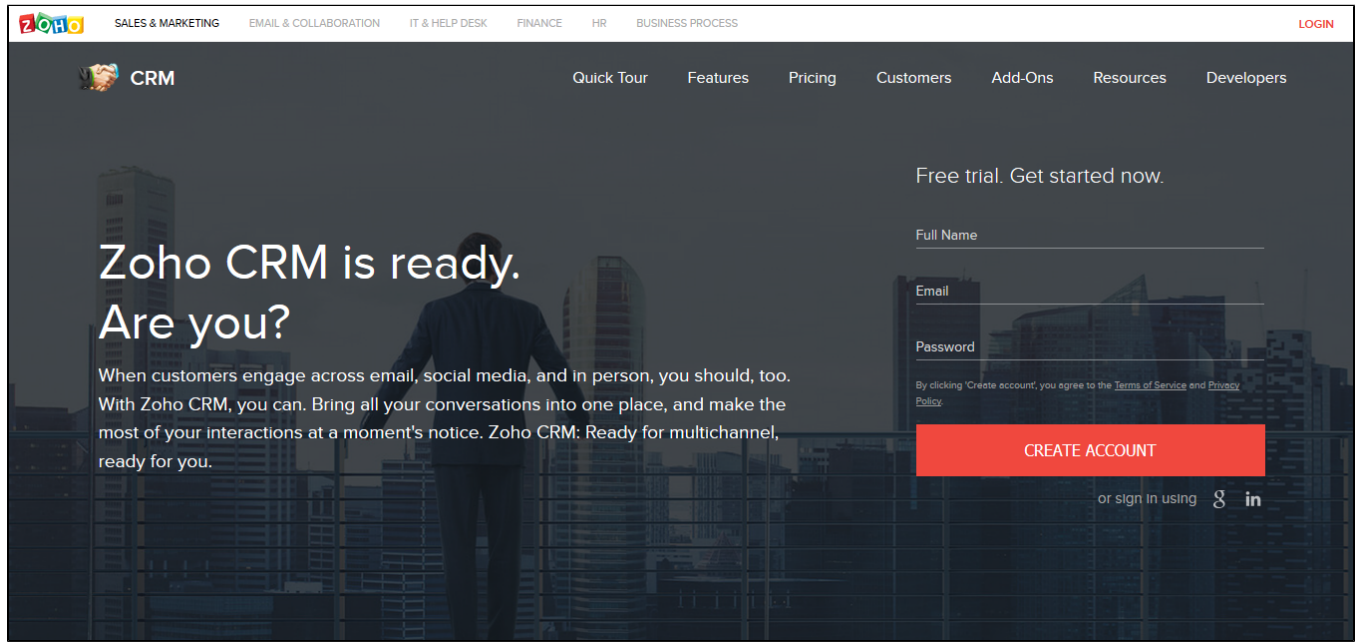
Compatibility: Magento 2.3.x, 2.4.x

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/

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

Configuration

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

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.

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

You will be redirected to Zoho, in here Zoho will require to access your information. Click **Accept**
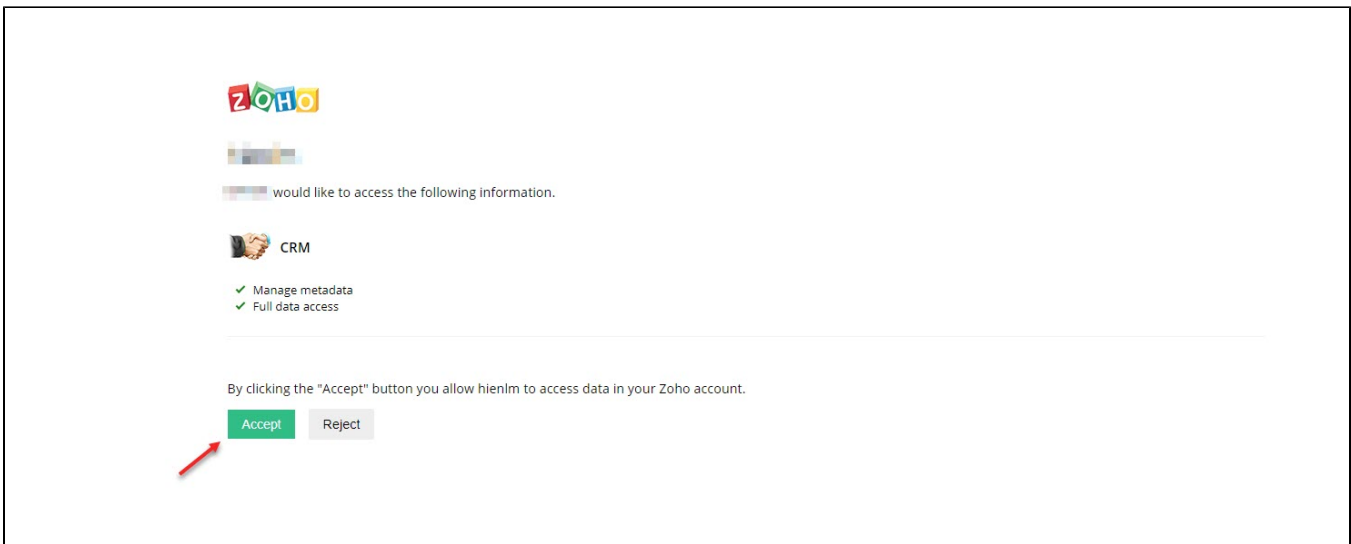
Save Report: Enable this to save the synchronization record in View Report.

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

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**

Manual Queue Adding

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

Orders

Invoices

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.

Synchronization History/Report

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

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

← 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

In Zoho's Leads

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

In Zoho's Contacts

← Ⓜ **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	Lead Source	
Account Name		Contact Name	Mia Abigail
Email	miaabigail@gmail.com	Vendor Name	
Phone	(098) 677-4868 📞	Title	
Other Phone		Department	
Mobile		Home Phone	
Assistant		Fax	
Reports To		Date of Birth	
Created By	IsabellaOlivia Fri, 7 Apr 2017 02:22 AM	Asst Phone	
Modified By	IsabellaOlivia Fri, 7 Apr 2017 03:02 AM	Email Opt Out	
		Skype ID	
		Secondary Email	
		Twitter	

Address Information

                                                                              Locate Map

Mailing Street	305 E 18th St, New York, NY 10003, USA	Other Street	
Mailing City	New York	Other City	
Mailing State	New York	Other State	
Mailing Zip	12345	Other Zip	
Mailing Country	United States	Other Country	

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

#000000009

← 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

In Zoho's Accounts:

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

After successfully Added Ball Pup

Yoga Adventure

🔍 🔔 14 👤 zoho ▾

Store View: All Store Views ▾ ❓   ← Back | Add Attribute | Save ▾

Enable Product [website]   🟢 Yes

Attribute Set   Default ▾

Product Name ⋆ [store view]   Yoga Adventure

SKU ⋆ [global]   Yoga Adventure

Price ⋆ [website] $ 75.00
Advanced Pricing

Tax Class [website]   Taxable Goods ▾

Quantity [global]   28
Advanced Inventory

Stock Status [global]   In Stock ▾

Weight [global]   lbs   This item has no weight ▾

Categories [global]   Training ✕ ▾   New Category

Visibility [store view]   Catalog, Search ▾

Set Product as New From [website]   📅   To   📅

Content ✏️   ⌄

Configurations   ⌄

Product Reviews   ⌄

Images And Videos   ⌃

Add Video

398x560 px, 39 KB

Base   Small
Thumbnail
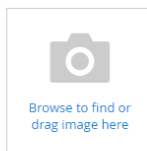
Search Engine Optimization   ⌄

Related Products, Up-Sells, and Cross-Sells   ⌄

Customizable Options   ⌄

Product in Websites   ⌄

Design   ⌄

Schedule Design Update   ⌄

Gift Options   ⌄

Downloadable Information ✏   ⌄

In Zoho's Products

- **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**

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

  When an invoice is successfully sent

#000000007

← 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	$75.00	1	$75.00	$0.00	$0.00	$75.00
Links Trailer #1 (2)						

Order Total

Invoice History

Comment Text

Invoice Totals

Subtotal	$75.00
Grand Total	**$75.00**

☐ Notify Customer by Email

☐ Visible on Storefront

Submit Comment

Magento ver. 2.1.0
Report Bugs

In Zoho's Invoices

- **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.

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