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

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Status	Zoho CRM User ID					
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Products	Zoho CRM Password					
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💄 Users	Manual and Auth Talian	Charles and a strain of the second and a second				
🖋 Tools	Manual set Auth Token	✓ Check this checkbox if you want to manually enter Auth Token instead get Auth key automatically				
III Settings	Register User to Lead	✓ Transmit registed users in Woocommerce to Lead in Zoho CRM				
Zoho CRM Integration	Orders in Woocommerce into					
A Collection of the second s	Account of Zoho CRM	✓ Transmit Orders in Woocommerce into Account of Zoho CRM				
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	Orders in Woocommerce into Contact of Zoho CRM					
	Sync Zoho CRM	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 recode
- 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**

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	Label	Woocommerce Side	ZohoCRM Side	Enable
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ut Settings	State	Shipping State	-> State	✓
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	Contact Mapp	bing Setting		
	Submit			

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

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	Address Information						Locate Map		
	Billing Street	Ha Noi			 Shipping Street				
	Billing City	Ha Noi			Shipping City				
	Billing State				Shipping State				

There are 3 actions in Woocommerce can sync to Zoho:

VN

List Price (VND)

2.00

Quantity

1

- 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.

Shipping Code

Shipping Country

Amount (VND)

2.00

Discount (VND)

0.00

Tax (VND)

0.00

Total (VND)

Sub Total VND 0 ^ Discount VND 0.00

0.00

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

Notices:

Billing Code

Billing Country

Product Details

Product Details

Woo Single #2

#

- 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

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Billing State		Shipping State			
Billing Code		Shipping Code			
Billing Country	VN	Shipping Country			
Product Deta	ails				

#	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 Tot	
						Discou	nt VND 0.00

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

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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	
						Discount	VND 0.00

5. Sync error

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Dashboard	Back					
🖈 Posts	Add/Edit Field Mapping)				
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Billin	g State				Shipping State			
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Proc	duct Details		List Price (VND)	Quantity	Amount (VND)	Discount (VND)	Tax (VND)	Total (VND)
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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:

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Pages	Woocommerce field	Product Name	•		Zoho field	Leads Accounts
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WooCommerce	Save Save & Add new					Products Invoices
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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 \land
						Discount	VND 0.00

Invoice in Zoho:

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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 \land
						Discount	VND 0.00