

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](#)
 - [Features](#)
 - [System Requirements](#)
 - [Video Tutorial](#)
- [Configuration](#)
 - [Login to the Zoho account](#)
 - [Configuration](#)
 - [Synchronization Settings](#)
 - [Field Mapping](#)
 - [Manual Queue Adding](#)
 - [Synchronization Process](#)
 - [Synchronization History/Report](#)
- [Main Features](#)
 - [Zoho CRM Default Synchronization Fields](#)
 - [Contact](#)
 - [Account](#)
 - [Lead](#)
 - [Product](#)
 - [Sales Order](#)
 - [Invoice](#)
- [Update](#)
- [Support](#)

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 **2.3.x, 2.4.x**

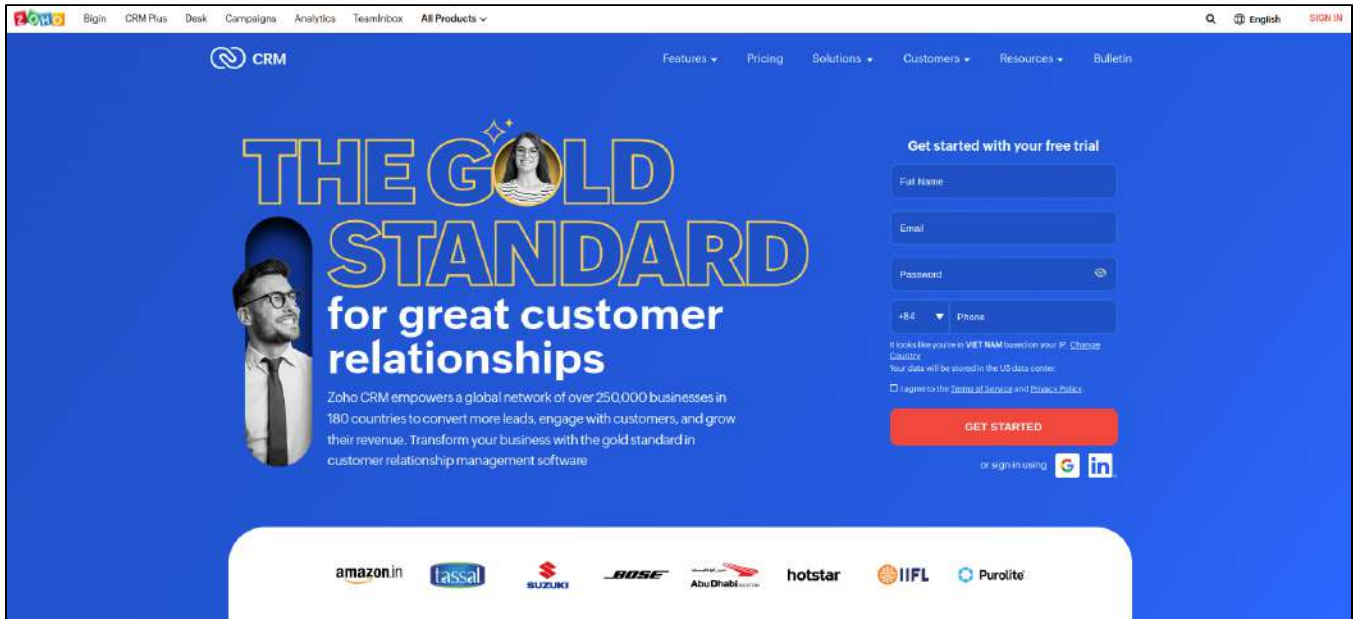
Video Tutorial



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.

Sign in to your Zoho CRM account

Email / Phone:

Password:

[Forgot Password?](#)

Keep me signed in

Sign In

Sign In using



Don't have a Zoho account?

[Sign Up Now](#)

Configuration

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



Magenest244

13 April 2022

Client Details

Client Secret

Settings

Client Name



Homepage URL

http://zoho244.com/

Authorized Redirect URIs

http://zoho244.com/zohocrm/getauth/index/



UPDATE



Magenest244

13 April 2022

Client Details

Client Secret

Settings

Client ID

1000 [redacted]

Client Secret

39b [redacted]

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

You can turn on this Admin Key later after connecting Magento 2 to Zoho CRM successfully.

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

Setup

Client Id [global] ?

Get Client Id and Client Secret at [here](#).

Note* Authorized redirect URIs:

(Client Domain)/admin/zohocrm/system_config_getauth/getAuthCode/
eg: yourdomain.com/admin/zohocrm/system_config_getauth/getAuthCode/

Client Secret [global]

Access Token [global]

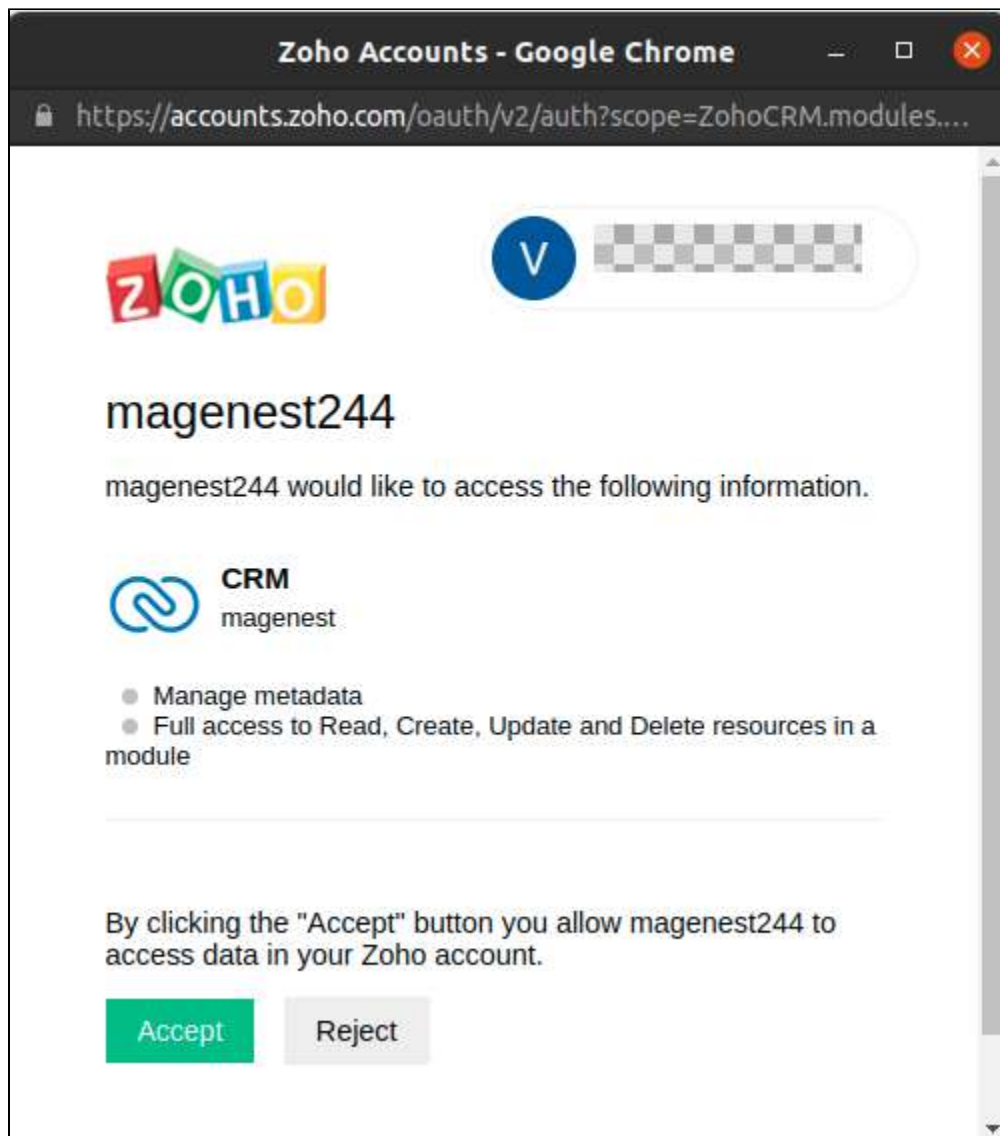
Zoho CRM Url Endpoint [global] ▼

Get Access Token

Note* Save Client Id & Client Secret Configuration AND **disable Add Secret Key to URLs in Admin configuration** before get Access Token. ?

Save Report [global] ▼

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

Time [store view] 2 hour

Invoice

Enable [store view] Yes

Sync Mode [store view] Sync Daily

Product

Enable [store view] Yes

Sync Mode [store view] Sync Manually

Synchronize

Sync All Data Now

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**

Mapping Management

Mapping

* Note: You should map the fields have the same name or the same data type

Save Mapping

Magento Fields	Description	Status
Account Number (bigint)	Auto Generate	Enabled
Choose Fields--		Enabled
Created At	Choose Fields--	Enabled
Updated At	Choose Fields--	Enabled
is Active	Choose Fields--	Enabled
Created in	Account Site (text)	Enabled
Prefix	Choose Fields--	Enabled

Manual Queue Adding

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

Customers

Search by keyword

6 records found per page

- Actions
- Delete
- Subscribe to Newsletter
- Unsubscribe from Newsletter
- Assign a Customer Group
- Edit
- Add to queue as Account
- Add to queue as Contact
- Add to queue as Lead

Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in
General					Jan 12, 2018 5:57:57 AM	Main Website	Confirmation Not Required	Default Store View
General					Jan 23, 2018 7:47:54 AM	Main Website	Confirmation Not Required	Default Store View
General	123456789	123456	United States	California	Jan 26, 2018 6:07:12 AM	Main Website	Confirmation Not Required	Default Store View
General					May 28, 2018 7:55:43 AM	Main Website	Confirmation Not Required	Default Store View

Add data to queue from customer grid table

Catalog

2058 records found

per page

- Actions
- Delete
- Change status
- Update attributes
- Add to queue

Name	Type	Attribute Set	SKU	Price	Quantity	Visibility
Dust Duffie Bag	Simple Product	Bag	24-MB01	\$34.00		Catalog, Search
Bandeau Jumpsuit in Dusty Blue Knit	Simple Product	Default	F02	\$74.00	99.0000	Catalog, Search
Crown Summit Backpack	Simple Product	Bag	24-MB03	\$38.00	100.0000	Catalog, Search
Wayfarer Messenger Bag	Simple Product	Bag	24-MB05	\$45.00	100.0000	Catalog, Search

Add data to queue from product catalog

Orders

Search by keyword

Filters

45 records found

Actions

- Cancel
- Hold
- Unhold
- Print Invoices
- Print Packing Slips
- Print Credit Memos
- Print All
- Print Shipping Labels
- Add to queue**

Add data to queue from order grid table

Order Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purch
Website Store Default Store View	Jun 13, 2018, 18:06:00 PM	Tuklal Poudel	Tuklal Poudel	\$38.00	\$38.00
Website Store Default Store View	Jun 13, 2018, 6:06:00 AM	Pankaj Lad	Pankaj Lad	\$34.00	\$34.00
Website Store Default Store View	Jan 22, 2018, 8:01:00 AM	Hoang Ryu	Hoang Ryu	\$369.00	\$369.00
Website Store Default Store View	Jan 22, 2018, 7:01:00 AM	Hoang Ryu	Hoang Ryu	\$369.00	\$369.00
000000041 Main Website Main Website Store	Jan 22, 2018, 7:01:00 AM	Hoang Ryu	Hoang Ryu	\$369.00	\$369.00

Invoices

Search by keyword

Filters

13 records found

Actions

- PDF Invoices
- Add to queue**

Add data to queue from Invoices grid table

Order Date	Order #	Order Date	Bill-to Name	Status	Grand Total (Base)	Grand
Apr 22, 2017 1:23:41 AM	000000001	Apr 22, 2017 1:23:41 AM		Paid	\$36.39	\$36.3
Apr 22, 2017 1:23:42 AM	000000002	Apr 22, 2017 1:23:42 AM		Paid	\$39.64	\$39.6
Jun 13, 2017 7:22:06 AM	000000003	May 23, 2017 1:28:10 AM		Paid	\$48.00	\$48.0
Dec 27, 2017 1:02:50 AM	000000009	Dec 27, 2017 1:02:19 AM		Paid	\$50.00	\$50.0
Jan 12, 2018 4:14:34 AM	000000033	Jan 12, 2018 3:23:45 AM		Paid	\$400.00	\$400.
Jan 12, 2018 4:18:58 AM	000000034	Jan 12, 2018 3:23:54 AM		Paid	\$200.00	\$200.
Jan 12, 2018 6:00:29 AM	000000035	Jan 12, 2018 5:59:19 AM		Paid	\$36.00	\$36.0

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.**

Queue

Total record: 6

Sync All

[Sync Account](#)
[Sync Campaign](#)
[Sync Contact](#)
[Sync Lead](#)
[Sync Order](#)
[Sync Invoice](#)
[Sync Product](#)

[Add Account](#)
[Add Campaign](#)
[Add Contact](#)
[Add Lead](#)
[Add Order](#)
[Add Invoice](#)
[Add Product](#)

Filters Columns

20 per page 1 of 1

6 records found

ID	Magento Entity Id	Enqueue Time	Type	Status
29692	1	2018-07-20 06:28:25	Campaigns	error
29691	29	2018-07-16 11:23:59	Accounts	pending
29690	28	2018-07-16 11:23:59	Accounts	pending
29689	27	2018-07-16 11:23:59	Accounts	pending
29688	26	2018-07-16 11:23:59	Accounts	pending
29687	20	2018-07-16 11:23:59	Accounts	pending

Synchronization History/Report

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

View Report

Filters Default View Columns Export

Active filters: Status: Error

54 records found

999 per page 1 of 1

ID	Record ID in ZohoCRM	ZohoCRM Table	Message	Username	Email	Modified By	Json Log	Website	Date Time	Status
2206		invoices	required field not found	Admin Admin	nguyenvanhang16012000@gmail.com		{\"code\":\"MANDATORY_NOT_FOUND\",\"details\":{\"api_name\":\"Product_Details\"},\"message\":\"required field not found\",\"status\":\"error\"}	All website	May 3, 2022 8:46:27 PM	ERROR
2205		invoices	invalid data	Admin Admin	nguyenvanhang16012000@gmail.com		{\"code\":\"INVALID_DATA\",\"details\":{\"api_name\":\"product\",\"index\":0,\"parent_api_name\":\"Product_Details\"},\"message\":\"invalid data\",\"status\":\"error\"}	All website	May 3, 2022 9:23:11 PM	ERROR
2204		invoices	invalid data	Admin Admin	nguyenvanhang16012000@gmail.com		{\"code\":\"INVALID_DATA\",\"details\":{\"api_name\":\"product\",\"index\":0,\"parent_api_name\":\"Product_Details\",\"id\":\"522035700000545012\"},\"message\":\"invalid data\",\"status\":\"error\"}	All website	May 3, 2022 9:12:55 PM	ERROR
2201		invoices	invalid data	Admin Admin	nguyenvanhang16012000@gmail.com		{\"code\":\"INVALID_DATA\",\"details\":{\"api_name\":\"product\",\"index\":0,\"parent_api_name\":\"Product_Details\",\"id\":\"522035700000545011\"},\"message\":\"invalid data\",\"status\":\"error\"}	All website	May 3, 2022 9:01:42 PM	ERROR
2200		invoices	invalid data	Admin Admin	nguyenvanhang16012000@gmail.com		{\"code\":\"INVALID_DATA\",\"details\":{\"api_name\":\"product\",\"index\":0,\"parent_api_name\":\"Product_Details\",\"id\":\"522035700000545012\"},\"message\":\"invalid data\",\"status\":\"error\"}	All website	May 3, 2022 8:59:16 PM	ERROR
2199		Sales_Orders	invalid data	Admin Admin	nguyenvanhang16012000@gmail.com		{\"code\":\"INVALID_DATA\",\"details\":{\"api_name\":\"product\",\"index\":0,\"parent_api_name\":\"Product_Details\",\"id\":\"522035700000447001\"},\"message\":\"invalid data\",\"status\":\"error\"}	All website	May 3, 2022 8:57:49 PM	ERROR

You can also view the synchronization history in Customer, Product, Order info

thang nguyen ← Back Login as Customer Delete Customer Reset Create Order Reset Password Force Sign-In Save and Continue Edit **Save Customer**

CUSTOMER INFORMATION

- Customer View
- Account Information
- Addresses
- Orders
- Shopping cart
- Newsletter
- Billing Agreements
- Product Reviews
- Wish List
- Zoho CRM integration

Information

Zoho Contact ID	Last Updated At	Created At	Account Zoho
522035700000526001	Apr 28, 2022, 8:30:05 PM	Apr 28, 2022, 8:30:05 PM	Vân Thắng Nguyễn
Add Contact to queue Now			
Zoho Lead ID	Last Updated At	Created At	Account Zoho
522035700000390616	Apr 29, 2022, 1:52:19 AM	Apr 29, 2022, 1:52:19 AM	Vân Thắng Nguyễn
Add Lead to queue Now			
Zoho Account ID	Last Updated At	Created At	Account Zoho
522035700000381001	Apr 21, 2022, 3:15:03 AM	Apr 21, 2022, 3:15:03 AM	Vân Thắng Nguyễn
Add Account to queue Now			

Sync History

1.	2022-04-29 08:52:19	Leads
2.	2022-04-29 03:30:05	Contacts
3.	2022-04-21 10:15:03	Accounts

Syncing history in each customer info

Joust Duffle Bag ← Back Add Attribute **Save**

Product Salable Quantity ? ☺

Design ☺

Schedule Design Update ☺

Gift Options ☺

Downloadable Information ☺

Zoho CRM Integration ☺

Information

Zoho Product ID	Last Updated At	Created At	Account Zoho
522035700000396001	May 11, 2022, 11:16:41 PM	May 11, 2022, 11:16:41 PM	Vân Thắng Nguyễn
Add to queue Now			

Sync History

1.	2022-05-12 06:16:41	Products	ok
----	---------------------	----------	----

Syncing history in each product info

#00000007

← Back Login as Customer Cancel Send Email Hold Invoice Ship Reorder **Edit**

ORDER VIEW

Information

Invoices

Credit Memos

Shipments

Comments History

Zoho CRM Integration

Information

Zoho Order ID	Last Updated At	Created At	Account Zoho
522035700000448007	Apr 20, 2022, 9:46:24 PM	Apr 20, 2022, 9:46:24 PM	Vân Thắng Nguyễn
522035700000435016	Apr 23, 2022, 12:54:26 AM	Apr 20, 2022, 9:51:38 PM	Vân Thắng Nguyễn
522035700000332001	May 5, 2022, 2:00:08 AM	Apr 27, 2022, 7:03:12 PM	Vân Thắng Nguyễn

Sync Order:

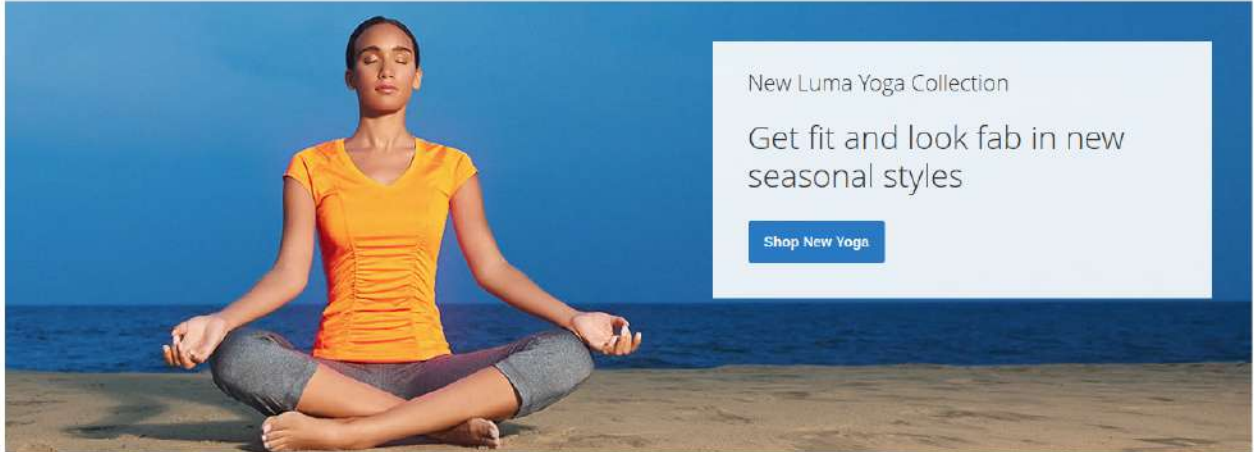
Sync History

ID	Timestamp	Entity	Status
1.	2022-05-05 09:00:08	Sales_Orders	Ok
2.	2022-05-05 07:00:09	Sales_Orders	Ok
3.	2022-05-04 07:00:08	Sales_Orders	Ok
4.	2022-04-28 02:03:12	Sales_Orders	Ok
5.	2022-04-23 07:54:26	Sales_Orders	Ok
6.	2022-04-23 07:32:09	Sales_Orders	Ok
7.	2022-04-23 07:17:09	Sales_Orders	Ok
8.	2022-04-21 04:51:38	Sales_Orders	Ok
9.	2022-04-21 04:46:24	Sales_Orders	Ok

Syncing history in each order info

Main Features

In Magento 2 Register Page



New Luma Yoga Collection

Get fit and look fab in new seasonal styles

[Shop New Yoga](#)

20% OFF

Luma pants when you shop today*

[Shop Pants >](#)




Even more ways to mix and match

Buy 3 Luma tees get a 4th free


[Shop Tees >](#)

In Zoho's Leads

CRM Home Leads Contacts Accounts Deals Tasks Meetings Calls Reports Analytics Products Quotes Sales Orders Projects ...


←  **Veronica Costello** - roni_cost@example.com
 Add Tags


Overview Timeline

Lead Owner: Văn Thắng Nguyễn
 Email: roni_cost@example.com
 Phone:  (555) 229-3326
 Mobile: —
 Lead Status: —

Hide Details


Lead Information

Lead Owner: Văn Thắng Nguyễn	Company: roni_cost@example.com
Title: —	Lead Name: Veronica Costello
Phone:  (555) 229-3326	Email: roni_cost@example.com
Mobile: —	Fax: —
Lead Source: —	Website: —
Industry: —	Lead Status: —
Annual Revenue: —	No of Employees: —
Email Opt Out: —	Rating: —
Modified By: Văn Thắng Nguyễn	Created By: Văn Thắng Nguyễn


 Here is your Social Chat (Ctrl+Space)

In Zoho's Contacts

CRM Home Leads **Contacts** Accounts Deals Tasks Meetings Calls Reports Analytics Products Quotes Sales Orders Projects ...


←  **Veronica Costello** - Veronica Costello
Add Tags

Overview Timeline

Contact Owner: Văn Thắng Nguyễn
 Email: roni_cost@example.com
 Phone:  (555) 229-3326
 Mobile: —
 Department: —


Hide Details

Contact Information

Contact Owner	Văn Thắng Nguyễn	Lead Source	—
Account Name	Veronica Costello	Contact Name	Veronica Costello
Email	roni_cost@example.com	Vendor Name	—
Phone	 (555) 229-3326	Title	—
Other Phone	—	Department	—
Mobile	—	Home Phone	—
Assistant	—	Fax	—
Created By	Văn Thắng Nguyễn Wed, 20 Apr 2022 10:19 AM	Date of Birth	01/01/1970
		Asst. Phone	—

- When a customer adds products to their shopping cart and then checks out, all of the customer information (Leads, Accounts, and Contacts) will be added to the queue in order to wait for syncing to Zoho.

After successfully placed an order



SALES

CATALOG

CUSTOMERS

MARKETING

CONTACT

REPORTS

INTEGRATION

STORES

SYSTEM

FIELD BUSINESS & EXPANSION

#00000007

zoho244

← Back
Login as Customer
Cancel
Send Email
Hold
Invoice
Ship
Reorder
Edit

ORDER VIEW

Information

Invoices

Credit Memos

Shipments

Comments History

Zoho CRM Integration

Order & Account Information

Order # 00000007 (The order confirmation email is not sent)

Order Date	Apr 20, 2022, 9:43:52 PM
Order Status	Pending
Purchased From	Main Website Main Website Store Default Store View
Placed from IP:	127.0.0.1

Account Information [Edit Customer](#)

Customer Name	demo2 demo2
Email	demo2@gmail.com
Customer Group	General

Address Information

Billing Address [Edit](#)

demo2 demo2
34 gfg
5555, District of Columbia, 12345
United States
T: 09898788786

Shipping Address [Edit](#)

demo2 demo2
34 gfg
5555, District of Columbia, 12345
United States
T: 09898788786

Payment & Shipping Method

Payment Information

Check / Money order
The order was placed using USD.

Shipping & Handling Information

Best Way - Table Rate \$15.00

Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Push It Messenger Bag SKU: 24-WB04	Ordered	\$45.00	\$45.00	Ordered 1	\$45.00	\$0.00	0%	\$0.00	\$45.00

Order Total

Notes for this Order

Status: Pending

Comment:

Notify Customer by Email

Visible on Storefront

Submit Comment

Order Totals

Subtotal	\$45.00
Shipping & Handling	\$15.00
Grand Total	\$60.00
Total Paid	\$0.00
Total Refunded	\$0.00
Total Due	\$60.00

Copyright © 2022 Magento Commerce Inc. All rights reserved.

Magento ver. 2.4.4

[Privacy Policy](#) | [Report an Issue](#)

In Zoho's Sales Orders

CRM Home Leads Contacts Accounts Deals Tasks Meetings Calls Reports Analytics Products Quotes Sales Orders Projects ...

000000004

← Add Tags

Overview Timeline

SO Number: 5220357000000447005
 Status: complete
 Due Date: 21/04/2022
 Sales Order Owner: Văn Thắng Nguyễn
 Pending: —

Accounts
 Veronica Costello

Contacts
 Veronica Costello
 Veronica Costello
 roni_cost@example.com
 (555) 229-3326

Hide Details

Sales Order Information

Sales Order Owner: Văn Thắng Nguyễn	SO Number: 5220357000000447005
Subject: 000000004	Deal Name: —
Customer No: —	Purchase Order: —
Quote Name: —	Due Date: 21/04/2022

In Zoho's Accounts:

CRM Home Leads Contacts Accounts Deals Tasks Meetings Calls Reports Analytics Products Quotes Sales Orders Projects ...

← Veronica Costello Add Tags

Overview Timeline

Account Owner: Văn Thắng Nguyễn

Industry: —

Employees: —

Annual Revenue: —

Phone: —

Contacts

Veronica Costello
roni_cost@example.com
(555) 229-3326

Hide Details

Account Information

Account Owner:	Văn Thắng Nguyễn	Rating:	—
Account Name:	Veronica Costello	Phone:	—
Account Site:	—	Fax:	—
Parent Account:	—	Website:	—

After successfully Added Product

Impulse Duffle

Scope: All Store Views

← Back Add Attribute Save

Enable Product Yes

Attribute Set: Bag

Product Name: Impulse Duffle

SKU: 24-UB02

Price: \$ 74.00
Advanced Pricing

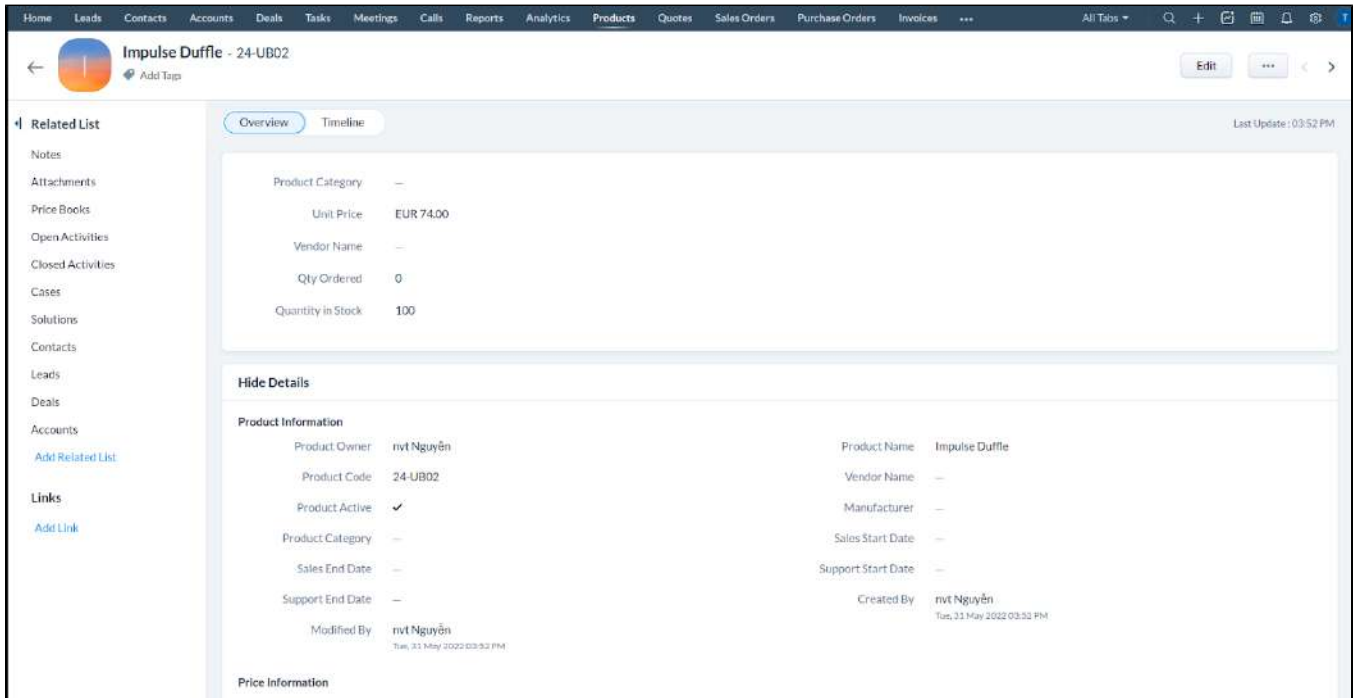
Tax Class: Taxable Goods

Quantity: 100
Advanced Inventory

Stock Status: In Stock

Weight: lbs This item has weight

In Zoho's Product



The screenshot shows the Zoho CRM interface for a product named "Impulse Duffle" with ID "24-UB02". The top navigation bar includes Home, Leads, Contacts, Accounts, Deals, Tasks, Meetings, Calls, Reports, Analytics, Products, Quotes, Sales Orders, Purchase Orders, Invoices, and All Tabs. The left sidebar lists various CRM modules like Notes, Attachments, Price Books, Open Activities, Closed Activities, Cases, Solutions, Contacts, Leads, Deals, Accounts, and Links. The main content area is divided into "Overview" and "Timeline" tabs, with "Overview" selected. The "Overview" section displays key product details: Product Category (—), Unit Price (EUR 74.00), Vendor Name (—), Qty Ordered (0), and Quantity in Stock (100). Below this is the "Hide Details" section, which is expanded to show "Product Information". This section is split into two columns: the left column lists Product Owner (nvt Nguyễn), Product Code (24-UB02), Product Active (checked), Product Category (—), Sales End Date (—), Support End Date (—), and Modified By (nvt Nguyễn, Tue, 31 May 2022 03:52 PM); the right column lists Product Name (Impulse Duffle), Vendor Name (—), Manufacturer (—), Sales Start Date (—), Support Start Date (—), and Created By (nvt Nguyễn, Tue, 31 May 2022 03:52 PM). At the bottom of the "Product Information" section, there is a "Price Information" header.

Home Leads Contacts Accounts Deals Tasks Meetings Calls Reports Analytics Products Quotes Sales Orders Purchase Orders Invoices ... All Tabs

Impulse Duffle - 24-UB02 Edit ...

Related List Overview Timeline Last Update: 03:52 PM

Notes Attachments Price Books Open Activities Closed Activities Cases Solutions Contacts Leads Deals Accounts Add Related List Links Add Link

Product Category —
Unit Price EUR 74.00
Vendor Name —
Qty Ordered 0
Quantity in Stock 100












Hide Details

Product Information

Product Owner	nvt Nguyễn	Product Name	Impulse Duffle
Product Code	24-UB02	Vendor Name	—
Product Active	✓	Manufacturer	—
Product Category	—	Sales Start Date	—
Sales End Date	—	Support Start Date	—
Support End Date	—	Created By	nvt Nguyễn Tue, 31 May 2022 03:52 PM
Modified By	nvt Nguyễn Tue, 31 May 2022 03:52 PM		

Price Information

When an invoice is successfully sent

#00000001

🔍 🔔 👤 zoho244

[← Back](#) [Login as Customer](#) [Send Email](#) [Print](#)

Order & Account Information

Order # 00000001 (The order confirmation email is not sent)

Order Date:	Apr 12, 2022, 9:15:14 PM
Order Status:	Processing
Purchased From:	Main Website Main Website Store Default Store View

Account Information

[Edit Customer](#)

Customer Name:	Veronica Costello
Email:	roni_cost@example.com
Customer Group:	General

Address Information

Billing Address [edit](#)

Veronica Costello
6146 Honey Bluff Parkway
Calder, Michigan, 49628-7978
United States
T: (555) 229-3326

Shipping Address [edit](#)

Veronica Costello
6146 Honey Bluff Parkway
Calder, Michigan, 49628-7978
United States
T: (555) 229-3326

Payment & Shipping Method

Payment Information

Check / Money order
The order was placed using USD.

Shipping Information

Flat Rate - Fixed
Total Shipping Charges: **\$5.00**

Items Invoiced

Product	Price	Qty	Subtotal	Tax Amount	Discount Amount	Row Total
Iris Workout Top SKU: WS03-XS-Red Size: XS Color: Red	\$29.00	1	\$29.00	\$2.39	\$0.00	\$31.39

Order Total

Invoice History


Comment Text

Notify Customer by Email
 Visible on Storefront

[Submit Comment](#)

Invoice Totals

Subtotal	\$29.00
Shipping & Handling	\$5.00
Tax	\$2.39
Grand Total	\$36.39

 Copyright © 2022 Magento Commerce Inc. All rights reserved.

Magento ver. 2.4.4
[Privacy Policy](#) | [Report an issue](#)

In Zoho's Invoices

00000001 Edit

Overview Timeline Last Update: 12 days ago

Invoice Number: 522035700000545032
 Invoice Date: 13/04/2022
 Due Date: 13/04/2022
 Grand Total: VND 34
 Contact Name: Veronica Costello

Accounts

Veronica Costello

Contacts

Veronica Costello
 Veronica Costello
 verni_cost@sample.com
 (555) 229-3326

Hide Details

Invoice Information

Invoice Owner: Vân Thắng Nguyễn
 Subject: 00000001
 Invoice Date: 13/04/2022
 Due Date: 13/04/2022
 Account Name: Veronica Costello
 Contact Name: Veronica Costello

Invoice Number: 522035700000545032
 Sales Order: 00000001
 Purchase Order: -
 Extra Duty: -
 Created By: Vân Thắng Nguyễn
 Thu, 28 Apr 2022 10:05 PM
 Modified By: Vân Thắng Nguyễn
 Fri, 29 Apr 2022 03:24 PM

Address Information

Billing Street: 6146 Honey Bluff Parkway
 Billing City: Calder
 Billing Province: Michigan
 Billing Code: 49628-7978
 Billing Country: United States

Shipping Street: 6146 Honey Bluff Parkway
 Shipping City: Calder
 Shipping Province: Michigan
 Shipping Code: 49628-7978
 Shipping Country: United States

Locate Map

Involved Items

S.NO	Product Name	Quantity	List Price (VND)	Amount (VND)	Discount (VND)	Tax (VND)	Total (VND)
1	Iris Workout Top (WS03-XS-Red)	1	29	29	0	0	29

Sub Total	VND 29
Discount	VND 0
Tax	VND 0
Adjustment	VND 5
Grand Total	VND 34

Terms and Conditions
 Terms and Conditions: -

Description Information
 Description: -

Notes Recent List

Add note...

Attachments Attach

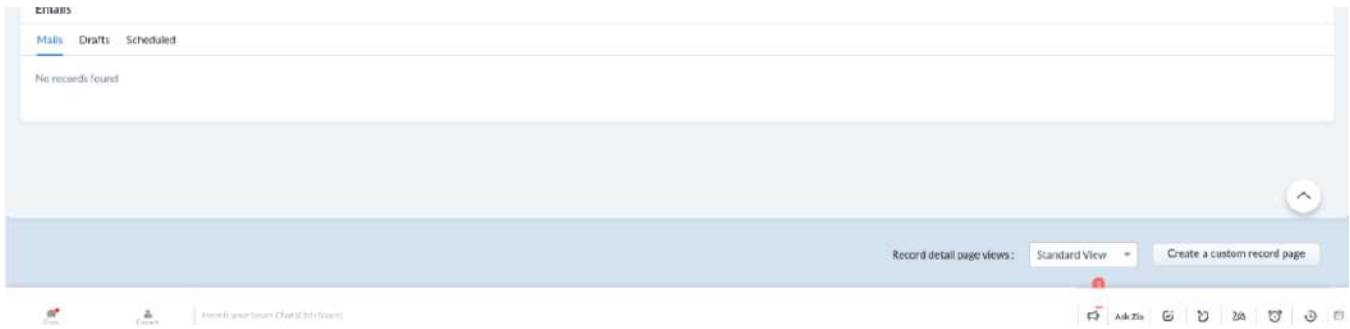
No Attachment

Open Activities Add New

No records found

Closed Activities

No records found



- When deleting a client account in Zoho (Leads, Accounts, and Contacts), administrators must do it from both Magento and 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
Company	Company

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.

Magenest