

WooCommerce Zoho CRM Bi-directional Integration



Thanks for purchasing our plugin. If you have any questions that are beyond the scope of the document, please feel free to reach us on support@magesture.com

By : Magesture Technology LLP.

WooCommerce Zoho Setup Guide

Installation Process

Download the package and go to **Plugin => Add New => Upload Plugin** and choose plugin package and activate the plugin.

Setting of Integration Options

1. Select **Zoho Server Domain** that contains your account.
2. Enter **Client ID & Client Secret**
 - Click the button of **How to create Client Id and Secret Key** for get Client Id and Secret Key.
3. **Zoho API Auth Token** is auto generate on save changes.
4. Enter this **Zoho Authorized redirect URIs** in Authorized redirect URIs field in Zoho Client ID Details Settings.
5. Select **Auto sync** option **Yes** or **No** for product, Customer and Order on create and update sync data from WooCommerce to Zoho CRM.
6. Select **Auto Sync data from Zoho CRM** option for Zoho CRM to WooCommerce for product and Customer.
7. Click on **Save Changes**.

The screenshot shows the 'Magesture Zoho CRM Integration Options' page. The left sidebar contains a menu with 'Zoho CRM' highlighted. The main content area has the following sections:

- Choose Zoho Server:** Radio buttons for ☒ crm.zoho.in, ☐ crm.zoho.com, ☐ crm.zoho.eu, and ☐ crm.zoho.com.cn.
- Zoho Client ID:** A text input field containing '1000.5PWFTG4VWEXKFGPA2IZXGZLTL9QCWW' and a button 'How to create Client id and Secret key'.
- Zoho Client Secret Key:** A text input field containing '1f5b89ce29725bead0ad6ef1b86a81937d54d7eb30'.
- Zoho API Auth Token:** A text input field containing '1000.9eeec5b4dadc0f48935c881ba08d94b_d3d421fa656609f58d4e7c77e873d76'.
- Zoho Authorized redirect URIs:** A text input field containing 'http://lion/wordpress/woo-zoho-crm-pro/wp-content/plugins/woocommerce-zoho/api/callback.php'. A note below says: 'Note : Enter this url in Authorized redirect URIs field in Zoho Client ID Details Settings.'
- Auto sync Products:** Radio buttons for ☒ Yes and ☐ No.
- Auto sync Orders:** Radio buttons for ☒ Yes and ☐ No.
- Auto sync Contacts:** Radio buttons for ☒ Yes and ☐ No.
- Auto Sync data from Zoho CRM to Woocommerce:**
 - Auto sync Contacts:** Radio buttons for ☒ Yes and ☐ No.
 - Auto sync Products:** Radio buttons for ☒ Yes and ☐ No.
- Save changes:** A blue button at the bottom.

At the bottom of the page, there is a footer that says 'Thank you for creating with WordPress.' and 'Version 5.3.2'.

Field Mapping

Go to Menu => **Field Mapping** and select fields for sync like as below screenshot.

Field Mapping

Add/Edit Field Mapping

Zoho Module: Products

Woocommerce Field: Select Woocommerce Field

Zoho Field: Select Zoho Field

Status: Active

Description:

Save changes

Show 10 entries

Id	Zoho Field	Woocommerce Field	Status	Type	Description	PreDefined	Action
1	Last_Name	last_name	1	Contacts	Mapping for Last Name	Yes	
2	First_Name	first_Name	1	Contacts	Mapping for First Name	Yes	
3	Product_Name	name	1	Products	Mapping for Product Name	Yes	
4	Product_Code	sku	1	Products	Mapping for Product Code	Yes	
5	Qty_in_Stock	stock_quantity	1	Products	Mapping for Stock Quantity	Yes	
6	Mailing_Street	billing_address_1	1	Contacts	Mapping for Billing Street		Delete
7	Unit_Price	price	1	Products	Mapping for Price		Delete
8	Billing_Code	billing_postcode	1	SalesOrders	Mapping for Billing code		Delete

Showing 1 to 8 of 8 entries

Previous 1 Next

Manual Sync

- For Sync Customer Go to **Customers Manual Sync**.
 - Click **Sync All Customer** button for all customer.
 - Click **Sync** Button Sync single customer as below screenshot.

Woo Zoho CRM Pro | New | Howdy, admin

Contacts Manual Sync

32 items | 1 of 4

For All Customer sync to Zoho CRM click here. → [Sync All Customer](#)

WooCommerce Id	WooCommerce Name	Email	Create Time	Action
3	5dn3fb72dfa	5dn3fb72dfa@thrubay.com	2019-08-08 11:12:56	Sync
4	nfhwy8chfws	nfhwy8chfws@payapun.com	2019-08-08 11:59:43	Sync
5	Monica B Rose	sk55u79o9d@iflymedia.com	2019-08-08 12:16:41	Sync
6	Courtney Bankston	gx6s7c8hopc@iflymedia.com	2019-08-09 08:42:40	Sync
7	Doris Sartin	o09ftb2qae@claimab.com	2019-08-09 08:49:26	Sync
8	Brian Baldwin	6042yo3ar9k@iflymedia.com	2019-08-09 08:52:25	Sync
9	Margaret Meissner	lqn84yde5q@fakemailgenerator.net	2019-08-09 08:55:35	Sync
10	Wanda P Howell	Howell@iflymedia.com	2019-08-09 08:55:58	Sync
11	Rhoda J Fox	Fox@iflymedia.com	2019-08-09 08:57:54	Sync
12	Kim Benavidez	ssc3m8ghos@fakemailgenerator.net	2019-08-09 08:59:22	Sync

For single Customer sync to Zoho CRM click here →

Thank you for creating with WordPress. | Version 5.3.2

2. For Sync Customer Go to **Products Manual Sync**.

- Click **Sync All Products** button for all products.
- Click **Sync** Button Sync single products as below screenshot.

Woo Zoho CRM Pro | New | Howdy, admin

Products Manual Sync

1,419 items | 1 of 142

For All Products sync to Zoho CRM click Here → [Sync All Products](#)

WooCommerce Id	Product Name	Sku	Create Time	Action
15	Green	wzcp15	2019-07-30 08:54:44	Sync
17	Cool Sword	wzcp17	2019-07-30 08:54:47	Sync
19	Cover Kit	wzcp19	2019-07-30 08:54:50	Sync
21	Moustache	wzcp21	2019-07-30 08:54:53	Sync
23	Doll	wzcp23	2019-07-30 08:54:56	Sync
25	Bike	wzcp25	2019-07-30 08:55:01	Sync
27	Table Green Doll	wzcp27	2019-07-30 08:55:05	Sync
29	Gun Album Brass	wzcp29 558 787	2019-07-30 08:55:09	Sync
31	Violet Lavender	wzcp31	2019-07-30 08:55:14	Sync
33	Car Oven	wzcp33	2019-07-30 08:55:17	Sync

For single product sync to Zoho CRM click here →

Thank you for creating with WordPress. | Version 5.3.2

3. For Sync Customer Go to **Orders Manual Sync**.

- Click **Sync All Orders** button for all orders.
- Click **Sync Button** Sync single orders as below screenshot.

Orders Manual Sync

For All Orders sync to Zoho CRM click Here → **Sync All Order**

47 items 1 of 5

Woocommerce Id	Create Time	Action
755	2019-08-08 12:16:45	Sync
904	2019-08-09 06:57:42	Sync
905	2019-08-09 07:01:12	Sync
906	2019-08-09 07:05:58	Sync
907	2019-08-09 07:10:22	Sync
908	2019-08-09 07:14:12	Sync
909	2019-08-09 07:17:36	Sync
910	2019-08-09 08:28:50	Sync
911	2019-08-09 08:31:37	Sync
912	2019-08-09 08:33:48	Sync

For single order sync to Zoho CRM click here

47 items 1 of 5

Thank you for creating with WordPress.

Version 5.3.2

Sync Reports

To view sync reports Go to Menu => **Zoho report**

Zoho Report

601 items 1 of 61

Id	Woocommerce Id	Record Id	Table Name	Action	Type	Message	Sync Date & Time
601	wzcp3796	85354000000161091	Products	Record Insert	success	record added	2019-12-27 11:06:38
600	wzcp3798	85354000000161085	Products	Record Insert	success	record added	2019-12-27 11:06:34
599	wzcp3800	85354000000162043	Products	Record Insert	success	record added	2019-12-27 11:06:30
598	wzcp3802	85354000000160891	Products	Record Insert	success	record added	2019-12-27 11:06:26
597	wzcp3804	85354000000160885	Products	Record Insert	success	record added	2019-12-27 11:06:23
596	wzcp3806	85354000000160879	Products	Record Insert	success	record added	2019-12-27 11:06:19
595	wzcp3808	85354000000161079	Products	Record Insert	success	record added	2019-12-27 11:06:09
594	wzcp3810	85354000000162037	Products	Record Insert	success	record added	2019-12-27 11:06:00
593	wzcp3812	85354000000160873	Products	Record Insert	success	record added	2019-12-27 11:05:53
592	wzcp3814	85354000000158853	Products	Record Insert	success	record added	2019-12-27 11:05:47

601 items 1 of 61

Contact Form 7 to Zoho Leads

For Sync **Contact Form 7** entry sync to **Zoho Leads**.

- Go to Menu => **Lead sync to Contact Form 7** and select fields for sync like as below screenshot.

Field Mapping

Add/Edit Field Mapping

Zoho Module: Leads

Contact Form: Contact Form 1

Contact Form Field: Select Field

Zoho Field: Lead Owner

Status: Active

Description:

Save changes

Show 10 entries

Id	Zoho Field	Contact Form Id	Contact Form Field	Status	Type	Description	Action
1	Last_Name	73	first-name	1	Leads	Mapping For First Name	Delete
2	Last_Name	73	last-name	1	Leads	Mapping For Last Name	Delete
3	Email	73	your-email	1	Leads	Mapping For Email	Delete
4	Description	73	your-message	1	Leads	Mapping For Description	Delete

Showing 1 to 4 of 4 entries

Previous 1 Next

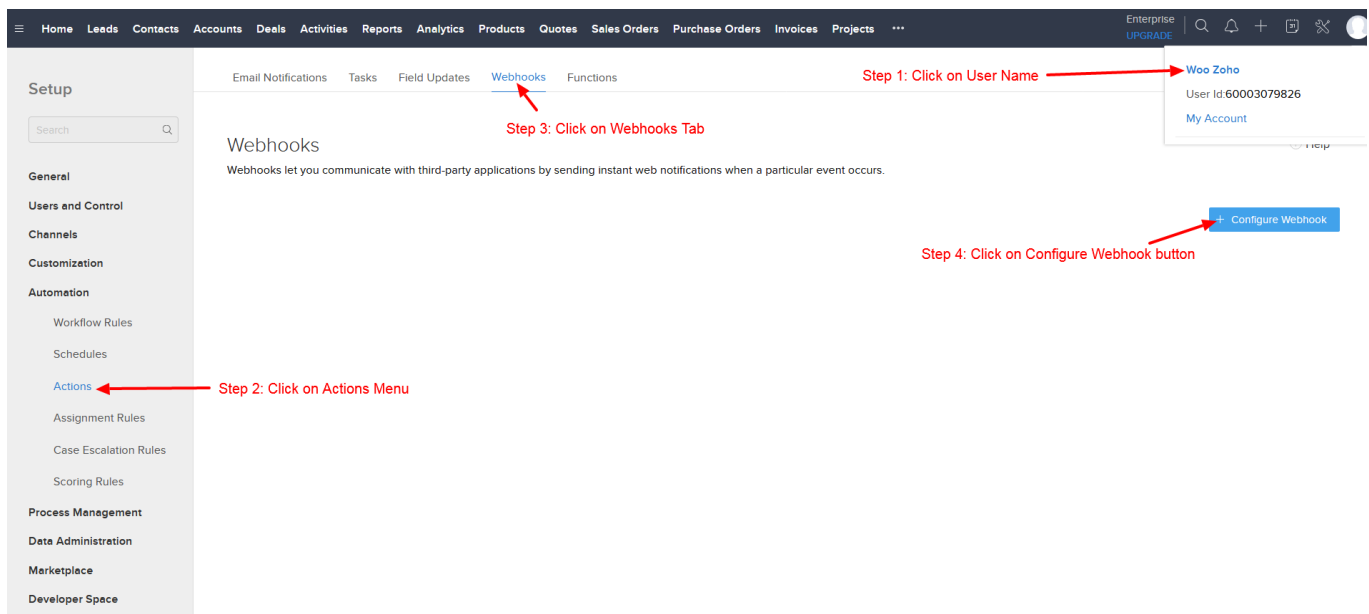
Thank you for creating with WordPress.

Version 5.3.2

For Setup Webhooks

Create Webhooks

1. **Step 1:** Click on User Name
2. **Step 2:** Click on Action Menu
3. **Step 3:** Click on Webhooks Tab
4. **Step 4:** Click on Configure Webhook button like as below screenshot.



Webhook for Product

- Step 1:** Enter your site url in URL to Notify section.
 - Note:** If your site url is **www.xyz.com** then your webhook url seems like **www.xyz.com/wp-content/plugins/woocommerce-zoho/api/product-hooks.php**.
- Step 2:** Enter parameter name and fields exactly same as given in below screenshot.
- Step 3:** Save all Setting.

The screenshot displays the 'New Webhook' configuration page in the MageSture application. The left sidebar shows the 'Setup' menu with various categories. The main content area is titled 'New Webhook' and includes the following sections:

- Name:** Products
- URL to Notify:** http://www.your-uri.com/wp-content/plugins/woocommerce-zoho/api/product-hooks.php (Annotated with Step 1)
- Method:** POST (selected), GET
- Description:** (empty)
- Module:** Products
- URL Parameters:**
 - Append Entity Parameters:**
 - Parameters in Standard Format:** A table with 4 rows:

Parameter Name	Parameter Value
Id	Products Product Id
Product_Code	Products Product Code
Product_Name	Products Product Name
Qty_in_Stock	Products Quantity in Stock

 (Annotated with Step 2)
 - Parameters in the User Defined Format:** (XML, JSON, etc.)
 - Preview URL:** (empty)
 - Buttons:** Save (Annotated with Step 3), Cancel

Webhook for Contact

- Step 1:** Enter your site url in URL to Notify section.
 - Note:** if your site url is **www.xyz.com** then your webhook url seems like **www.xyz.com/wp-content/plugins/woocommerce-zoho/api/contact-hooks.php**.
- Step 2:** Enter parameter name and fields exactly same as given in below screenshot.
- Step 3:** Save all Setting.

Enterprise
UPGRADE

Home Leads Contacts Accounts Deals Activities Reports Analytics Products Quotes Sales Orders Purchase Orders Invoices Projects ...

Setup

Email Notifications Tasks Field Updates **Webhooks** Functions

New Webhook

Name Customer

URL to Notify <http://www.your-url.com/wp-content/plugins/woocommerce-zoho/api/contact-hooks.php>

Method ☒ POST ☐ GET

Description

Module Contacts

URL Parameters

Append Entity Parameters

Parameters in Standard Format

Parameter Name	Parameter Value
Id	Contacts Contact Id
Email	Contacts Email
Last_Name	Contacts Last Name
First_Name	Contacts First Name

Parameters in the User Defined Format (XML, JSON, etc.)

Parameter Name

Contacts Select Field Insert

Value Description (XML, JSON, etc.)

Append Custom Parameters (Like API Key, Auth Token, etc.)

Preview URL

Save Cancel

Create Rules after Webhook Create

- Step 1:** Go to Workflow rules menu
- Step 2:** Click Create rules button for create rules
- Step 3:** Set the module and enter rule name and click on next button.

The screenshot shows the MageSture interface with the 'Workflow Rules' menu highlighted in the left sidebar. A 'Create New Rule' dialog box is open, showing the 'Module' dropdown set to 'Contacts', the 'Rule Name' field, and the 'Description' field. The 'Next' button is highlighted. Red arrows point to the 'Workflow Rules' menu item, the 'Create Rule' button, and the 'Module' dropdown.

Step 1: Go to workflow rules menu

Step 2: Click create rule button for crate rules

Step 3: Set the module and enter rule name

- Step 4:** Select option for when webhook should.
- Step 5:** Select option for which action webhook should be run.
- Step 6:** Select option for whether webhook should be run for particular records or all records.
- Step 7:** Select webhook from Instant Actions Dropdown.

The screenshot shows the MageSture interface with the 'Create New Rule' dialog box open. The 'When' section is selected, and the 'On a record action' option is chosen. The 'Create or Edit' option is selected under 'When do you want to execute this rule?'. The 'All Contacts' option is selected under 'Which contacts would you like to apply the rule to?'. The 'Instant Actions' dropdown is open, and the 'Webhook' option is selected. Red arrows point to the 'On a record action' option, the 'Create or Edit' option, the 'All Contacts' option, and the 'Webhook' option.

Step 4: Select option for when webhook should be run

Step 5: Select option for which action webhook should be run

Step 6: Select option for whether webhook should be run for particular records or all records.

Step 7: Select webhook from Instant Actions Dropdown

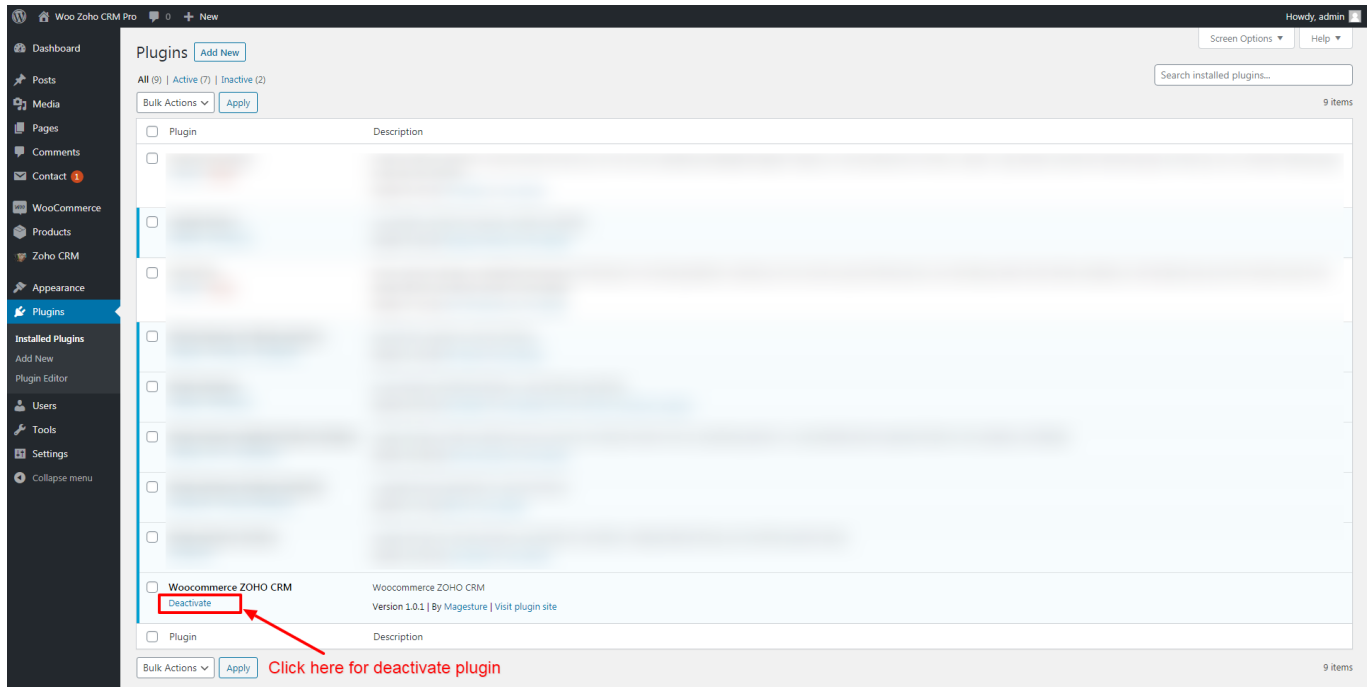
8. **Step 8:** Select webhook from webhook list.
9. **Step 9:** Click on Associate button for associate webhook.
10. **Step 10:** Save all Settings.

The screenshot displays the MageSture CRM interface for configuring a webhook. The sidebar on the left shows the 'Contacts' section with an 'Add Description' link. The main area features a 'Webhook - Contacts' modal. At the top of the modal is a search bar and a '+ New Webhook' button. Below this is a table with two columns: 'Name' and 'URL to Notify'. The 'Customer' webhook is selected, and its URL is 'http://www.your-url.com/wp-content/plugins/woocommerce-zoho...'. A red arrow labeled 'Step 8: Select Webhook from webhook list' points to the 'Customer' row. Below the table is an 'Associate' button, highlighted with a red box and labeled 'Step 9: click on Associate button for associate webhook'. To the left of the 'Associate' button is a 'Cancel' button. Below the 'Associate' button is a 'Done' button. The modal also includes a 'When' trigger section with 'On a record action' selected, and a 'Condition' section with 'All Contacts' selected. At the bottom of the modal, there are 'Instant Actions' and 'Scheduled Actions' sections. A 'Save' button is located at the bottom left of the modal, highlighted with a red box and labeled 'Step 10: Save all Setting'.

For Uninstall Plugin

For uninstall plugin

- Go to Menu => **Plugin**
- Click on Deactivate button



The screenshot shows the WordPress admin interface. The left sidebar menu has 'Plugins' highlighted. The main content area is titled 'Plugins' and shows a list of installed plugins. The 'WooCommerce ZOHO CRM' plugin is listed at the bottom. A red box highlights the 'Deactivate' button next to the plugin name. A red arrow points from the text 'Click here for deactivate plugin' at the bottom to the 'Deactivate' button. The plugin details show 'WooCommerce ZOHO CRM Version 1.0.1 | By Magesture | Visit plugin site'.

Plugin	Description
WooCommerce ZOHO CRM	WooCommerce ZOHO CRM Version 1.0.1 By Magesture Visit plugin site

Click here for deactivate plugin