

## ↳ How to Install Extension

Once you placed the order you will receive link to download extension package in your email box.

You can also download extension package from your MyAccount > My Downloadable Products Section.

### Step 1

Extract downloaded extension package in your magento root folder using FTP(File Transfer Protocol) Tools. For verification of root folder you can see some folders inside magento root folder like app,bin,lib,phpserver and vendor etc.

### Step 2

Next Need to run some magento commands to install extension in your system , so connect with your server via SSH and go to magento root folder (e.g : cd /var/www/html/magento243) and run below commands one by one.

- php bin/magento setup:upgrade
- php bin/magento setup:static-content:deploy-f
- php bin/magento indexer:reindex
- php bin/magento cache:clean
- php bin/magento cache:flush
- chmod-R 777 var/ pub/ generated/

### Step 3

if your all commands run successfully than login to your system Admin Panel and goto Store > Configuration , if you will see new Tab in left side bar with MageCurious Logo it means extension installed successfully.

**Hey !! You Installed Extension Successfully Now it's time to Configure Extension.**

## About the Extension:

With Zoho being the gold standard for customer relations, Magecurious developed *Zoho CRM Integration* extension Magento 2 in accordance with this standard.

With the Magento 2 Zoho CRM Integration extension, Magento 2 and Zoho CRM are integrated to automate data synchronization and improve business performance.

## Features of Magento 2 Zoho CRM Integration Extension:

=> An extension integrated into Zoho CRM that synchronizes store data with Zoho CRM Using Mass action the sync process.

=> By using the Client ID and Client Secret obtained from the Zoho CRM admin panel, Zoho CRM can be integrated easily with Magento 2.

=> Zoho CRM Integration with Magento 2:

- > Product synchronization
- > Orders synchronization
- > Invoices synchronization
- > Account synchronization

=> The admin can enable or disable the module.

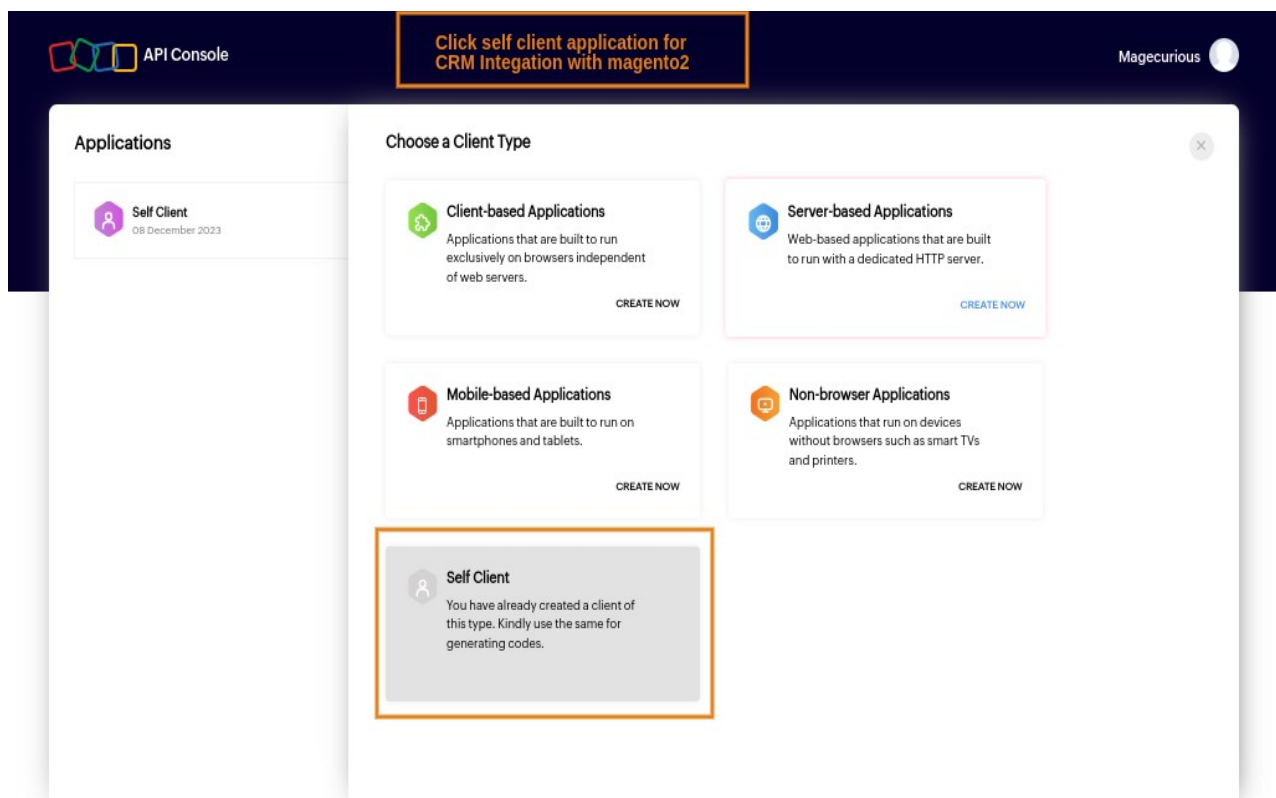
**NOTES: Orders and invoices will not sync in Zoho if the order and invoice products are not in Zoho. The order and invoice will sync once the product is added to Zoho.**

## ↳ How to Configure Extension

### Zoho API Configuration

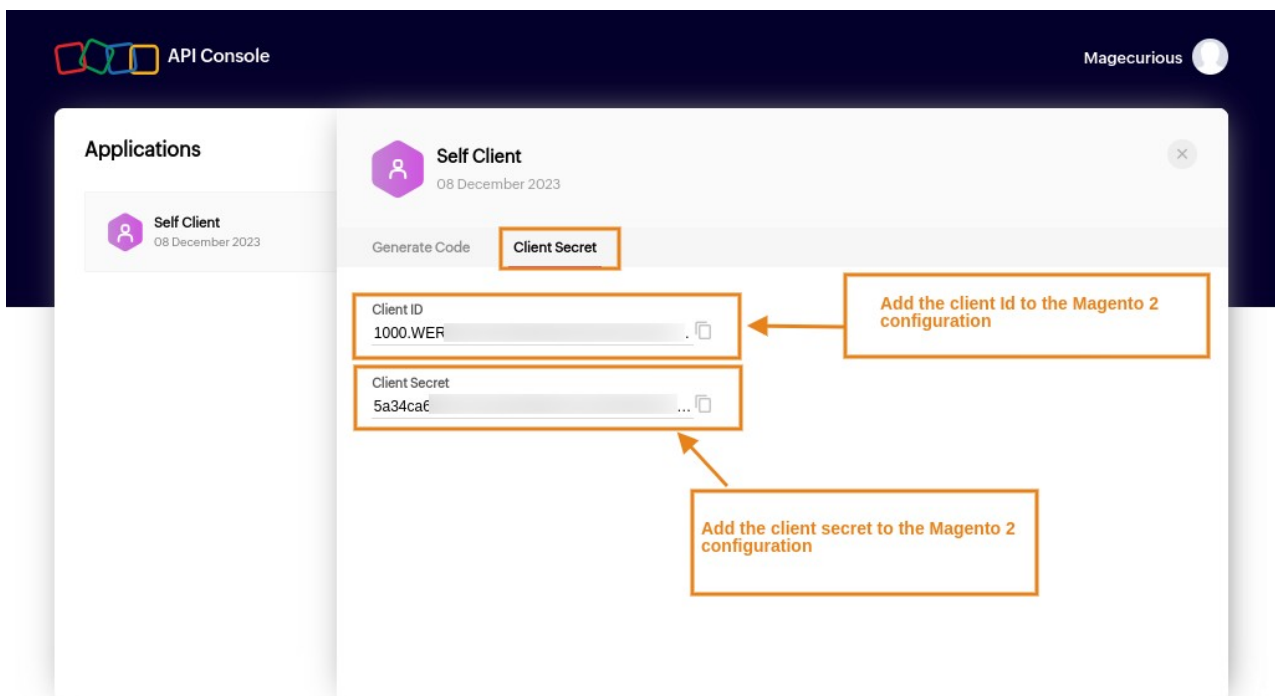
=> Prior to configuring the extension, you need to configure the Zoho for the API connection.

=> The first step is to log in with your Zoho CRM account credentials at <https://api-console.zoho.com/>. Click on the dashboard, add a new client, and select the client type as **“Self-client Applications”**.



When you make an application, you'll get the client ID and secret from the "**Client Secret**" section.

Make sure to remember or **copy** both the **Client ID** and **Client Secret**.



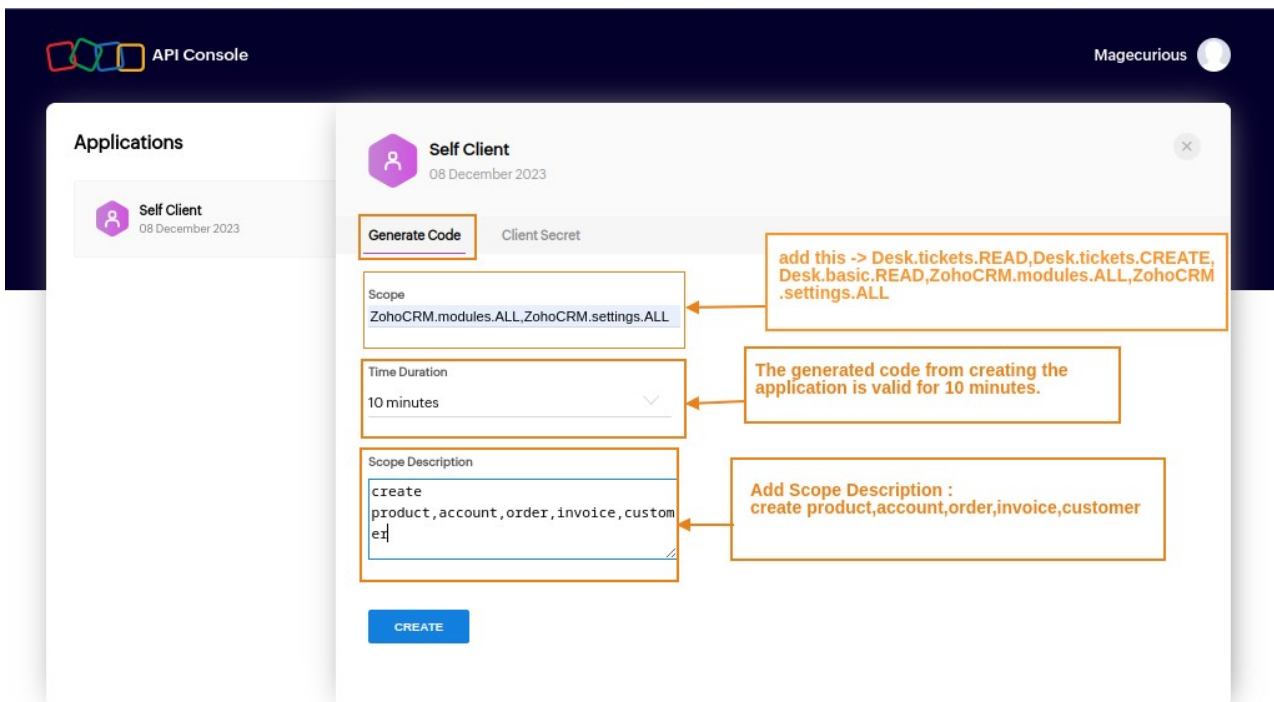
## => Generate Code Section :

**Scope :** add this ->

**Desk.tickets.READ,Desk.tickets.CREATE,Desk.basic.READ,ZohoCRM.modules.ALL,ZohoCRM.settings.ALL**

**Time duration :** 10 Minutes valid this create application generate code

**Scope Description :** add this -> create product , account , order , invoice , customer



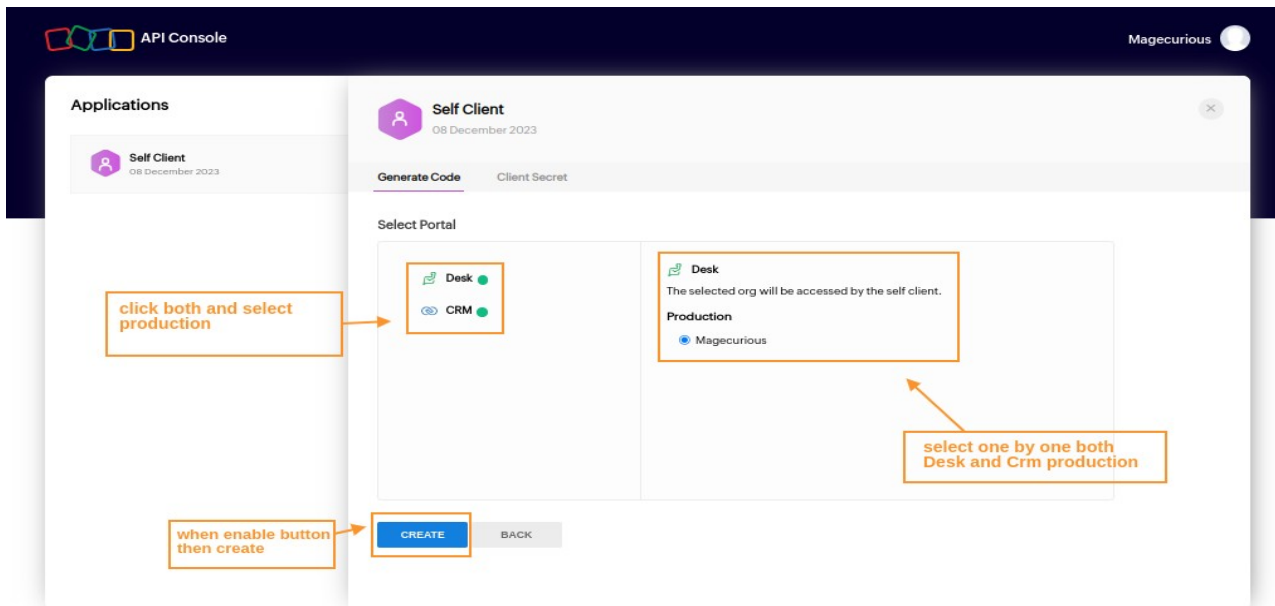
The screenshot shows the 'Generate Code' section of the Zoho API Console for a 'Self Client' application. The form includes the following fields and callouts:

- Scope:** ZohoCRM.modules.ALL,ZohoCRM.settings.ALL. Callout: add this -> Desk.tickets.READ,Desk.tickets.CREATE, Desk.basic.READ,ZohoCRM.modules.ALL,ZohoCRM.settings.ALL
- Time Duration:** 10 minutes. Callout: The generated code from creating the application is valid for 10 minutes.
- Scope Description:** create product , account , order , invoice , customer. Callout: Add Scope Description : create product,account,order,invoice,customer

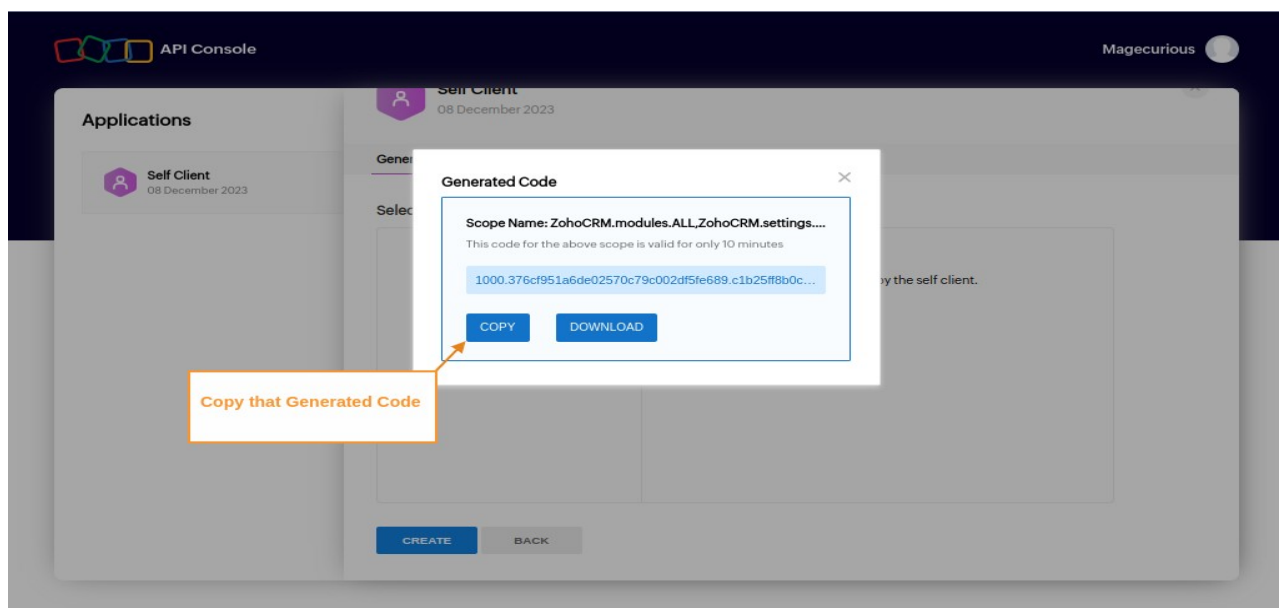
A 'CREATE' button is located at the bottom of the form.

-> When all details are filled then click Create Button .

=> After clicking the **"Create"** button, you'll encounter a form. Choose CRM and then select your company.



= When you generate a code copy, you can generate a Magento refresh token during that time period.

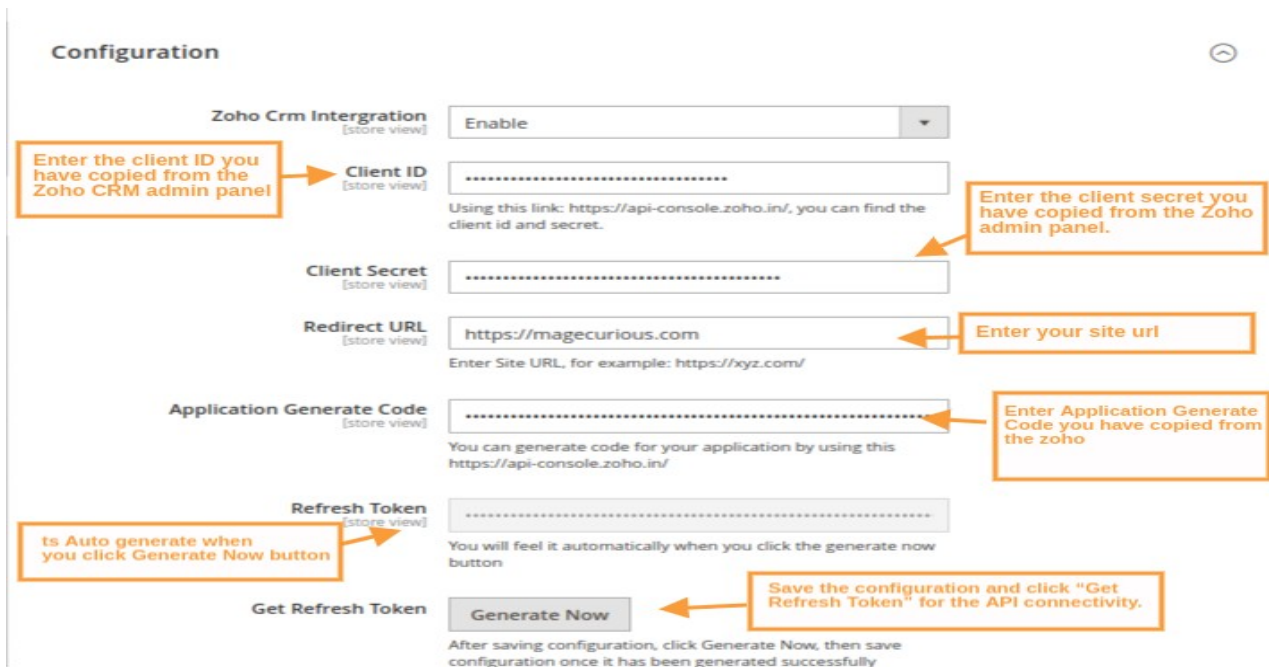


## Step 1

To Configure Extension go to **Stores -> Settings -> Configuration -> Magecurious -> Zoho Crm Intergration**

## Step 2 : Configuration

**Zoho Crm Intergration Configuration:**



The screenshot shows the 'Configuration' page for Zoho CRM integration. It includes the following fields and instructions:

- Zoho Crm Intergration** (store view): A dropdown menu set to 'Enable'.
- Client ID** (store view): A text input field. Annotation: 'Enter the client ID you have copied from the Zoho CRM admin panel'. Below the field: 'Using this link: <https://api-console.zoho.in/>, you can find the client id and secret.'
- Client Secret** (store view): A text input field. Annotation: 'Enter the client secret you have copied from the Zoho admin panel.'
- Redirect URL** (store view): A text input field containing 'https://magecurious.com'. Annotation: 'Enter your site url'. Below the field: 'Enter Site URL, for example: <https://xyz.com/>'
- Application Generate Code** (store view): A text input field. Annotation: 'Enter Application Generate Code you have copied from the zoho'. Below the field: 'You can generate code for your application by using this <https://api-console.zoho.in/>'
- Refresh Token** (store view): A text input field. Annotation: 'ts Auto generate when you click Generate Now button'. Below the field: 'You will feel it automatically when you click the generate now button'
- Get Refresh Token**: A 'Generate Now' button. Annotation: 'Save the configuration and click "Get Refresh Token" for the API connectivity'. Below the button: 'After saving configuration, click Generate Now, then save configuration once it has been generated successfully'

-> **Enable Zoho Crm Intergration** : Enable or Disable Module.

-> **Client ID** : Enter the **client ID** you have copied from the Zoho CRM admin panel.

-> **Client Secret** : Enter the **client secret** you have copied from the Zoho admin panel.

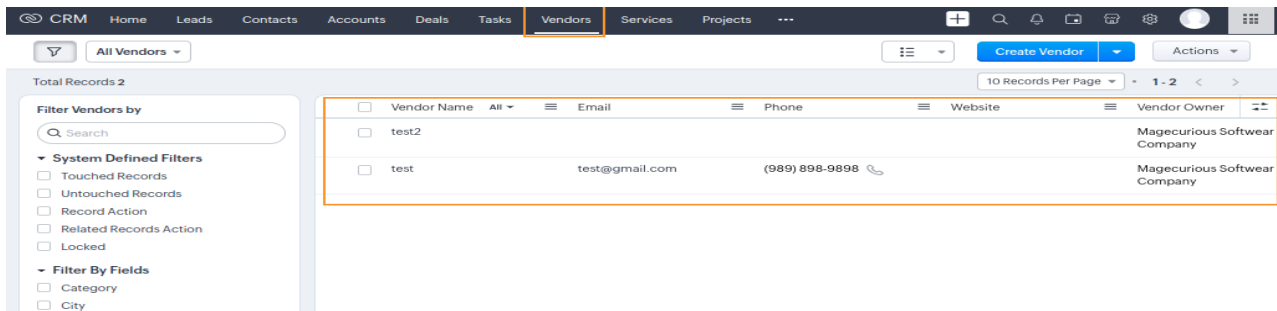
-> **Redirect URL** : Enter **your site url**

-> **Refresh Token** : Its **Auto generate** when you click Generate Now button

-> **Get Refresh Token** : **Save** the configuration and click "**Get Refresh Token**" for the API connectivity.

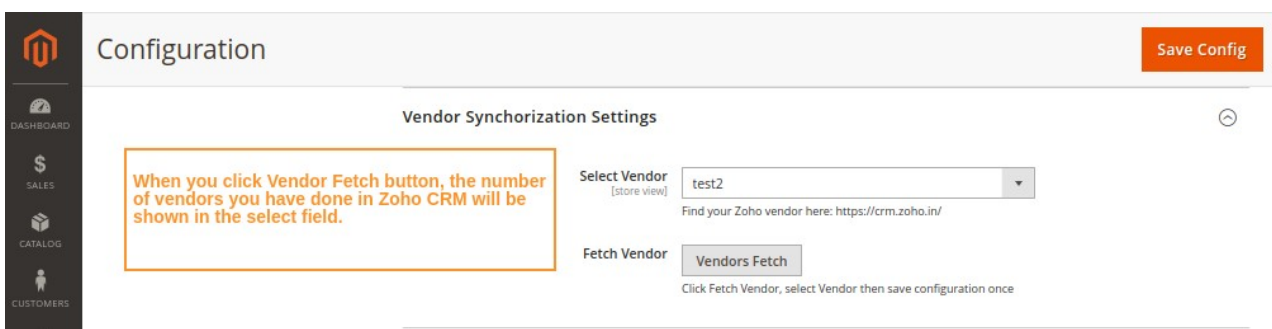
### Step 3 : Vendor Synchronization Settings:

**Notes : In Zoho Portal, you have to create vendors for this link <https://crm.zoho.in/crm/>**



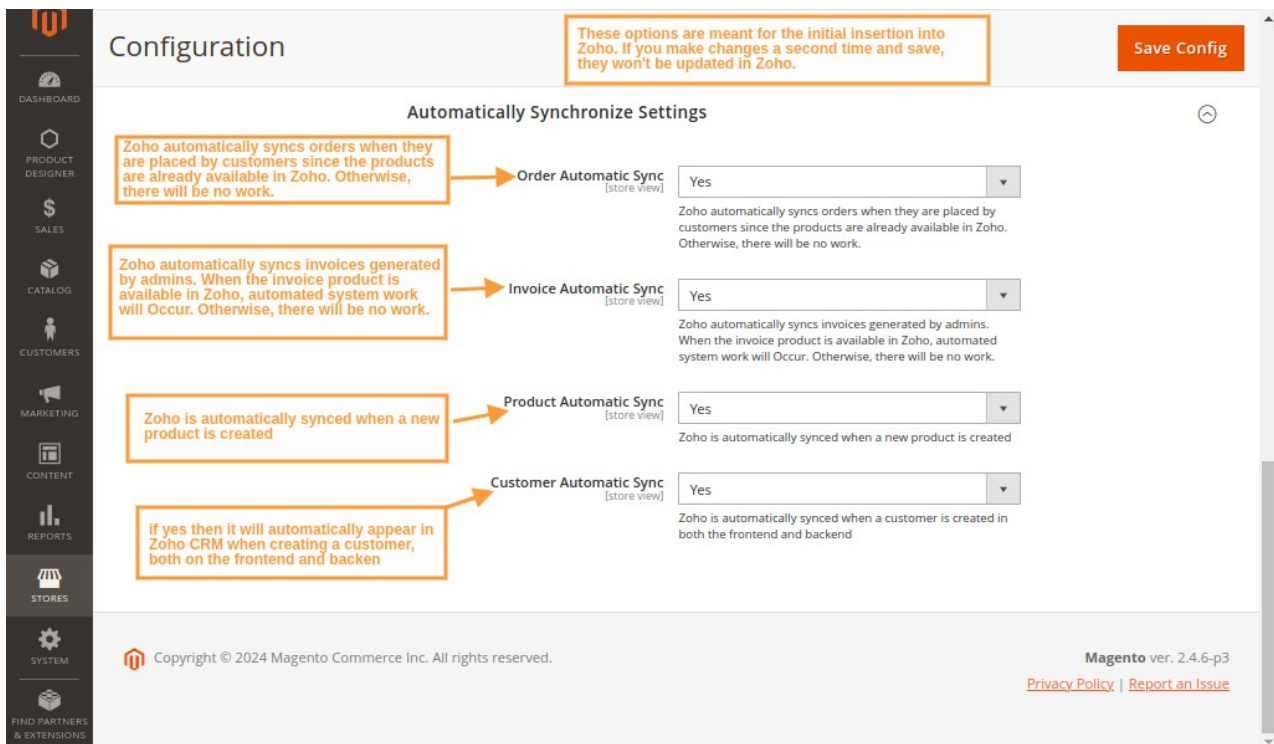
-> **After** click on the button, the number of vendors you have done in Zoho CRM will be shown in the select field.

-> Initially, click the button. If you don't see the vendor, refresh the page. This will display multiple vendors; choose any and save the configuration.



## step 4 : Automatically Synchronize Settings :

Note : These options are meant for the initial insertion into Zoho. If you make changes a second time and save, they won't be updated in Zoho.



The screenshot shows the 'Configuration' page in Magento, specifically the 'Automatically Synchronize Settings' section. A warning box at the top states: 'These options are meant for the initial insertion into Zoho. If you make changes a second time and save, they won't be updated in Zoho.' The settings are as follows:

- Order Automatic Sync** (store view): Yes. Description: Zoho automatically syncs orders when they are placed by customers since the products are already available in Zoho. Otherwise, there will be no work.
- Invoice Automatic Sync** (store view): Yes. Description: Zoho automatically syncs invoices generated by admins. When the invoice product is available in Zoho, automated system work will Occur. Otherwise, there will be no work.
- Product Automatic Sync** (store view): Yes. Description: Zoho is automatically synced when a new product is created.
- Customer Automatic Sync** (store view): Yes. Description: Zoho is automatically synced when a customer is created in both the frontend and backend.

At the bottom of the page, it shows 'Copyright © 2024 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.4.6-p3' with links for 'Privacy Policy' and 'Report an Issue'.

-> **Order Automatic Sync** : Zoho automatically syncs orders when they are placed by customers since the products are already available in Zoho. Otherwise, there will be no work

-> **Invoice Automatic Sync** : Zoho automatically syncs invoices generated by admins. When the invoice product is available in Zoho, automated system work will Occur. Otherwise, there will be no work.

-> **Product Automatic Sync** : If yes then it will automatically show in Zoho CRM while Create Product.

-> **Customer Automatic Sync** : if yes then it will automatically appear in Zoho CRM when creating a customer, both on the frontend and backend.

## 1 : Product Sync In zoho :

-> You can see in Mass Action the Product Sync to Zoho You can select a multiple product and add it to Zoho.

-> Once added, you can see Zoho product ID in grid.

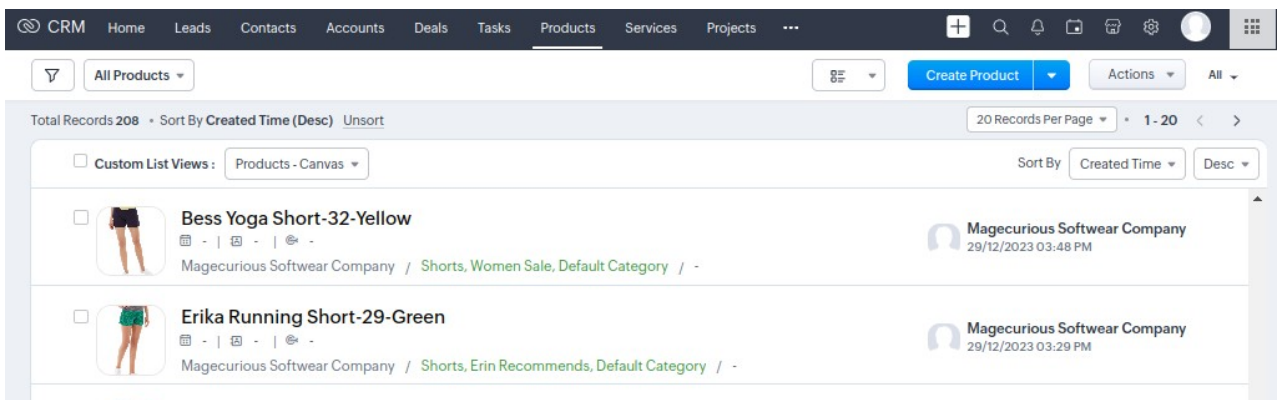


You can see in Mass Action the Product Sync to Zoho You can select a multiple product and add it to Zoho.

Once added, you can see Zoho product ID in grid

Name	Type	Attribute Set	SKU	Price	Quantity	Salable Quantity	Visibility	Status	Websites	Zoho Product Id
test	Simple Product	Default	test	\$125.00	10.0000	Default Stock: 10	Catalog, Search	Enabled	Main Website	
final_tesinf	Simple Product	Default	final_tesinf	\$125.00	99.0000	Default Stock: 97	Catalog, Search	Enabled	Main Website	61374200000562016
sky boot	Grouped Product	Default	sky boot		0.0000		Catalog, Search	Enabled	Main Website	61374200000585022
phone	Simple Product	Default	phone	\$10.00	100.0000	Default Stock: 99	Catalog, Search	Enabled	Main Website	61374200000584023
cabel	Simple Product	Default	cabel	\$12.00	100.0000	Default Stock: 99	Catalog, Search	Enabled	Main Website	61374200000596018
bundel product	Bundle Product	Default	bundel product		0.0000		Catalog, Search	Enabled	Main Website	61374200000562032

-> If you want to update the product then select it and click on Product Sync then it will be updated.



CRM Home Leads Contacts Accounts Deals Tasks Products Services Projects

All Products Create Product Actions All

Total Records 208 · Sort By Created Time (Desc) Unsort 20 Records Per Page 1 - 20

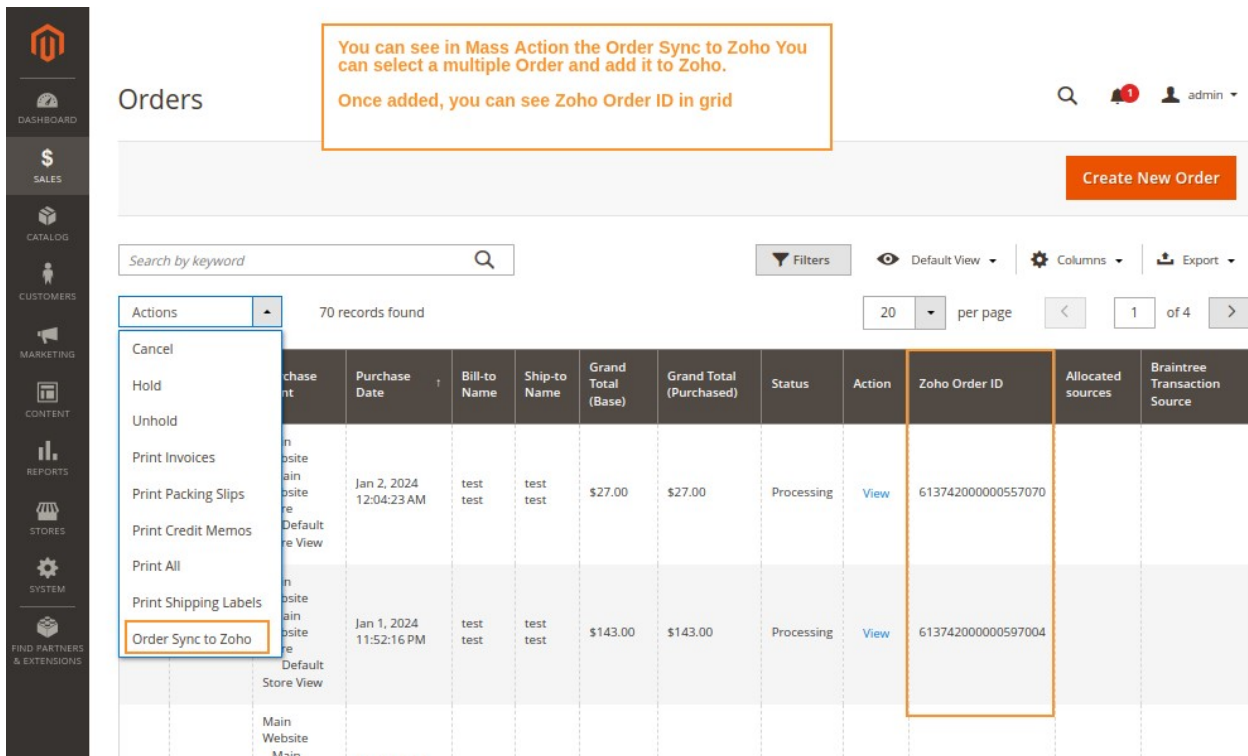
Custom List Views: Products - Canvas Sort By Created Time Desc

- Bess Yoga Short-32-Yellow**  
Magecurious Softwear Company / Shorts, Women Sale, Default Category / -  
Magecurious Softwear Company 29/12/2023 03:48 PM
- Erika Running Short-29-Green**  
Magecurious Softwear Company / Shorts, Erin Recommends, Default Category / -  
Magecurious Softwear Company 29/12/2023 03:29 PM

## 2 : Order Synce In zoho :

-> You can see in Mass Action the Order Sync to Zoho You can select a multiple Order and add it to Zoho.

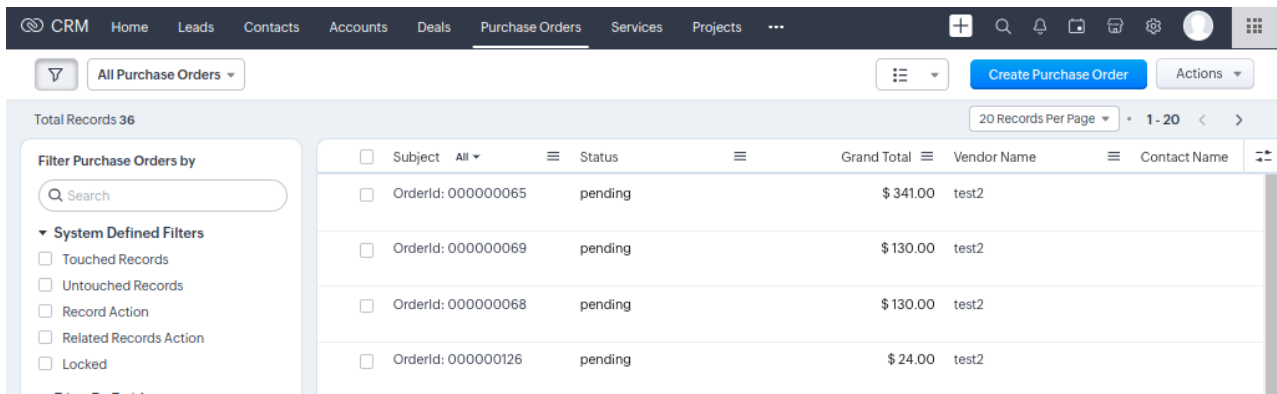
-> Once added, you can see Zoho Order ID in grid.



The screenshot shows the Zoho CRM 'Orders' page. A callout box states: "You can see in Mass Action the Order Sync to Zoho You can select a multiple Order and add it to Zoho. Once added, you can see Zoho Order ID in grid." The 'Actions' dropdown menu is open, and 'Order Sync to Zoho' is highlighted. The table below shows two records with their respective Zoho Order IDs highlighted in orange.

Actions	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action	Zoho Order ID	Allocated sources	Braintree Transaction Source
	Jan 2, 2024 12:04:23 AM	test	test	\$27.00	\$27.00	Processing	View	61374200000557070		
	Jan 1, 2024 11:52:16 PM	test	test	\$143.00	\$143.00	Processing	View	61374200000597004		

-> if you want to update the Order then select it and click on Order Sync then it will be updated.



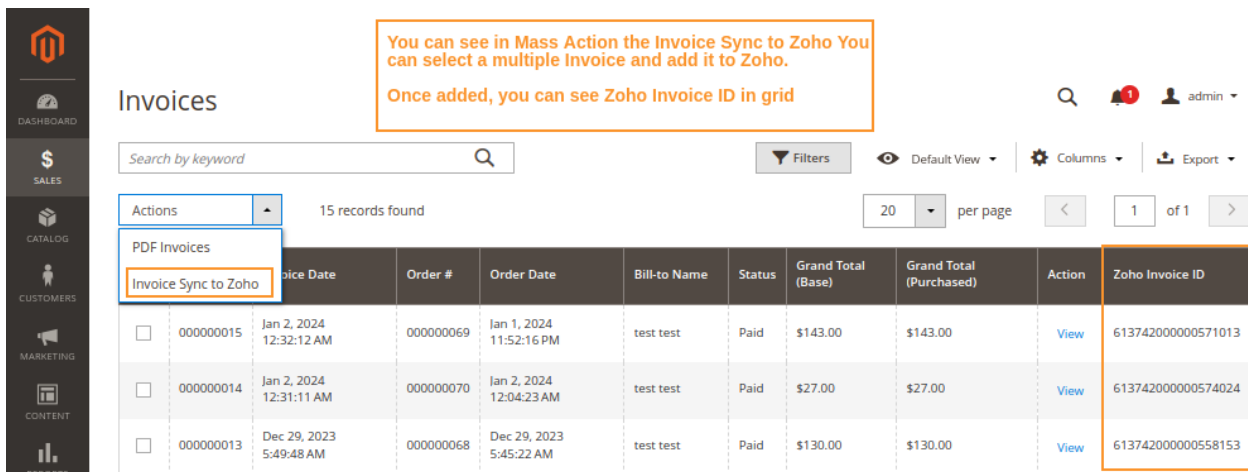
The screenshot shows the Zoho CRM 'Purchase Orders' page. The table displays a list of orders with the following columns: Subject, Status, Grand Total, Vendor Name, and Contact Name. The 'Order Sync to Zoho' option is not visible in this view.

Subject	Status	Grand Total	Vendor Name	Contact Name
OrderId: 000000065	pending	\$ 341.00	test2	
OrderId: 000000069	pending	\$ 130.00	test2	
OrderId: 000000068	pending	\$ 130.00	test2	
OrderId: 000000126	pending	\$ 24.00	test2	

### 3 : Invoice Synce In zoho :

-> You can see in Mass Action the Invoice Sync to Zoho You can select a multiple Invoice and add it to Zoho.

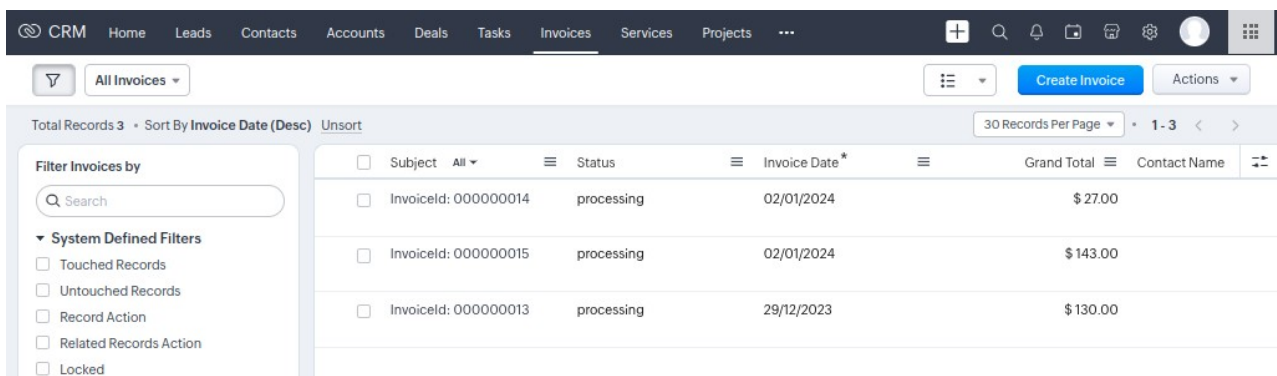
-> Once added, you can see Zoho Invoice ID in grid.



**You can see in Mass Action the Invoice Sync to Zoho You can select a multiple Invoice and add it to Zoho.**  
**Once added, you can see Zoho Invoice ID in grid**

	Invoice Date	Order #	Order Date	Bill-to Name	Status	Grand Total (Base)	Grand Total (Purchased)	Action	Zoho Invoice ID
<input type="checkbox"/>	000000015 Jan 2, 2024 12:32:12 AM	000000069	Jan 1, 2024 11:52:16 PM	test test	Paid	\$143.00	\$143.00	<a href="#">View</a>	61374200000571013
<input type="checkbox"/>	000000014 Jan 2, 2024 12:31:11 AM	000000070	Jan 2, 2024 12:04:23 AM	test test	Paid	\$27.00	\$27.00	<a href="#">View</a>	61374200000574024
<input type="checkbox"/>	000000013 Dec 29, 2023 5:49:48 AM	000000068	Dec 29, 2023 5:45:22 AM	test test	Paid	\$130.00	\$130.00	<a href="#">View</a>	61374200000558153

-> If you want to update the Invoice then select it and click on Invoice Sync then it will be updated.



CRM Home Leads Contacts Accounts Deals Tasks Invoices Services Projects

All Invoices Create Invoice Actions

Total Records 3 • Sort By Invoice Date (Desc) Unsort 30 Records Per Page 1-3

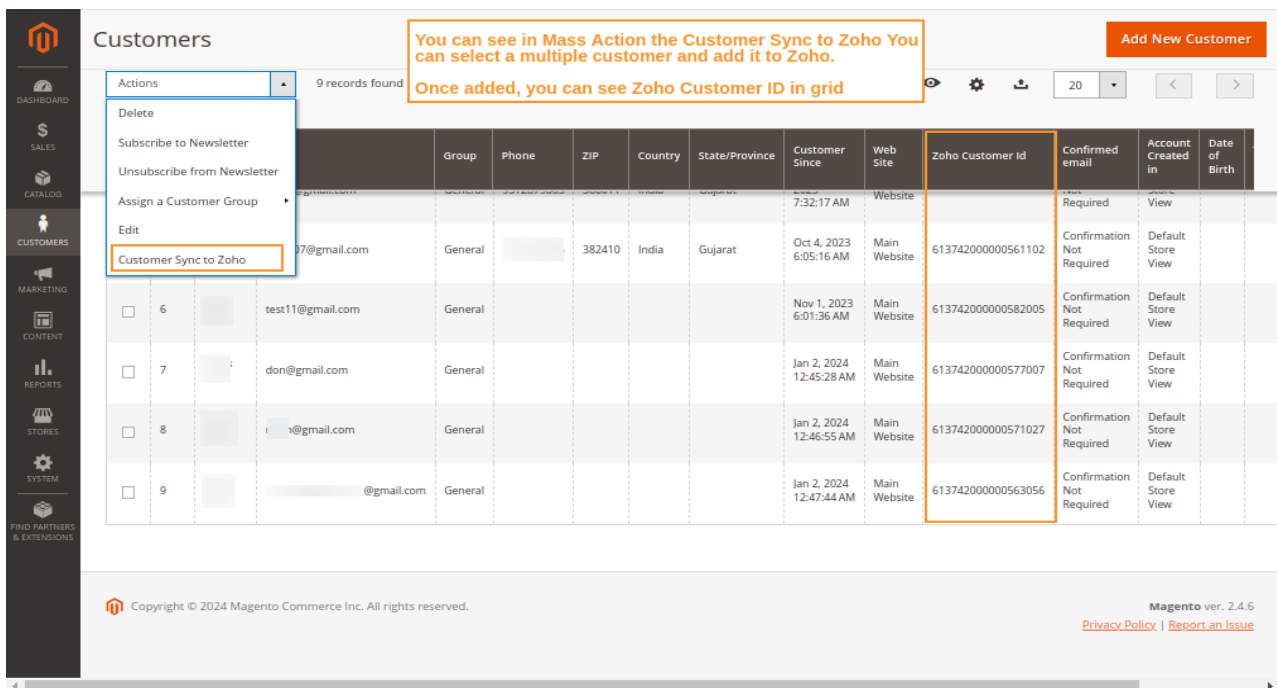
Filter Invoices by	Subject	Status	Invoice Date *	Grand Total	Contact Name
<input type="checkbox"/> Invoiceld: 000000014		processing	02/01/2024	\$ 27.00	
<input type="checkbox"/> Invoiceld: 000000015		processing	02/01/2024	\$ 143.00	
<input type="checkbox"/> Invoiceld: 000000013		processing	29/12/2023	\$ 130.00	

System Defined Filters: Touched Records, Untouched Records, Record Action, Related Records Action, Locked

#### 4 : Customer Sync In zoho :

-> You can see in Mass Action the Customer Sync to Zoho You can select a multiple Customer and add it to Zoho.

-> Once added, you can see Zoho Customer ID in grid



**Customers** 9 records found

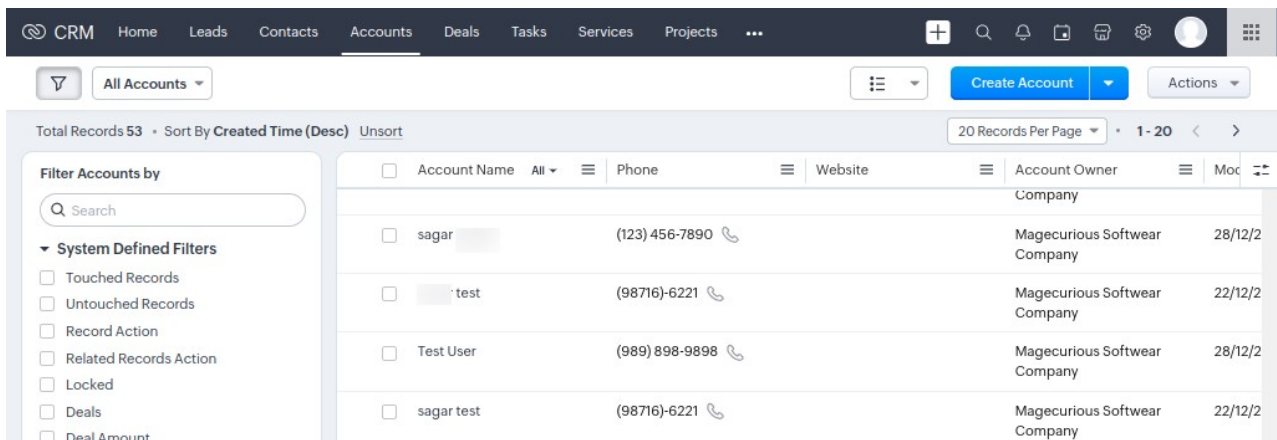
**Actions** (highlighted): Delete, Subscribe to Newsletter, Unsubscribe from Newsletter, Assign a Customer Group, Edit, **Customer Sync to Zoho** (highlighted)

**Table Data:**

	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Zoho Customer Id	Confirmed email	Account Created in	Date of Birth
	General		382410	India	Gujarat	Oct 4, 2023 6:05:16 AM	Main Website	61374200000561102	Required	View	
<input type="checkbox"/>	General	test11@gmail.com				Nov 1, 2023 6:01:36 AM	Main Website	61374200000582005	Confirmation Not Required	Default Store View	
<input type="checkbox"/>	General	don@gmail.com				Jan 2, 2024 12:45:28 AM	Main Website	61374200000577007	Confirmation Not Required	Default Store View	
<input type="checkbox"/>	General	@gmail.com				Jan 2, 2024 12:46:55 AM	Main Website	61374200000571027	Confirmation Not Required	Default Store View	
<input type="checkbox"/>	General	@gmail.com				Jan 2, 2024 12:47:44 AM	Main Website	61374200000563056	Confirmation Not Required	Default Store View	

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-> If you want to update the Invoice then select it and click on Customer Sync then it will be updated.



**CRM** Home Leads Contacts **Accounts** Deals Tasks Services Projects ...

All Accounts Create Account Actions

Total Records 53 • Sort By Created Time (Desc) Unsort 20 Records Per Page 1-20

**Filter Accounts by**

Search

**System Defined Filters**

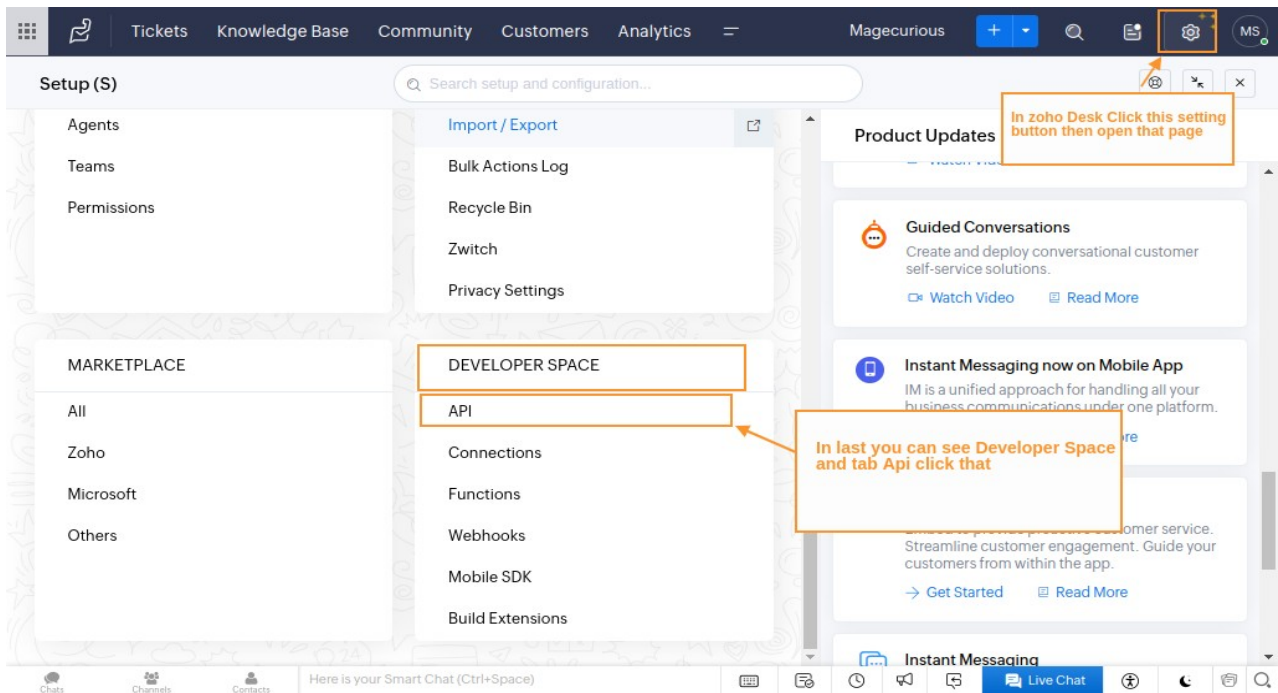
- Touched Records
- Untouched Records
- Record Action
- Related Records Action
- Locked
- Deals
- Deal Amount

<input type="checkbox"/>	Account Name	Phone	Website	Account Owner	Mod
	Company				
<input type="checkbox"/>	sagar	(123) 456-7890		Magecurious Software Company	28/12/2
<input type="checkbox"/>	test	(98716)-6221		Magecurious Software Company	22/12/2
<input type="checkbox"/>	Test User	(989) 898-9898		Magecurious Software Company	28/12/2
<input type="checkbox"/>	sagar test	(98716)-6221		Magecurious Software Company	22/12/2

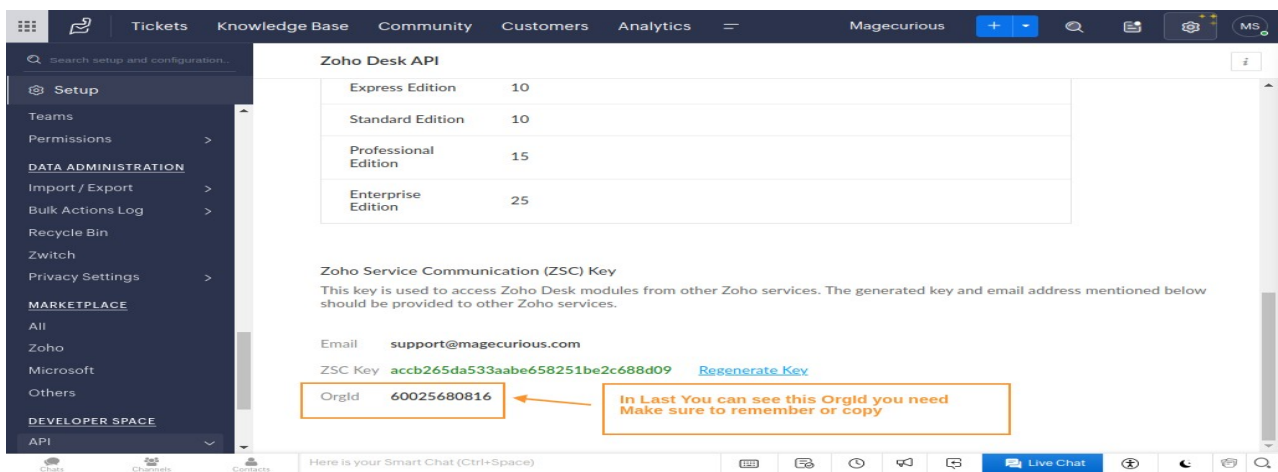
## \* Zoho ticket Intergration:

First Get Org ID: <https://desk.zoho.in/>

-> In login zoho desk You can see Setting button tap that button.

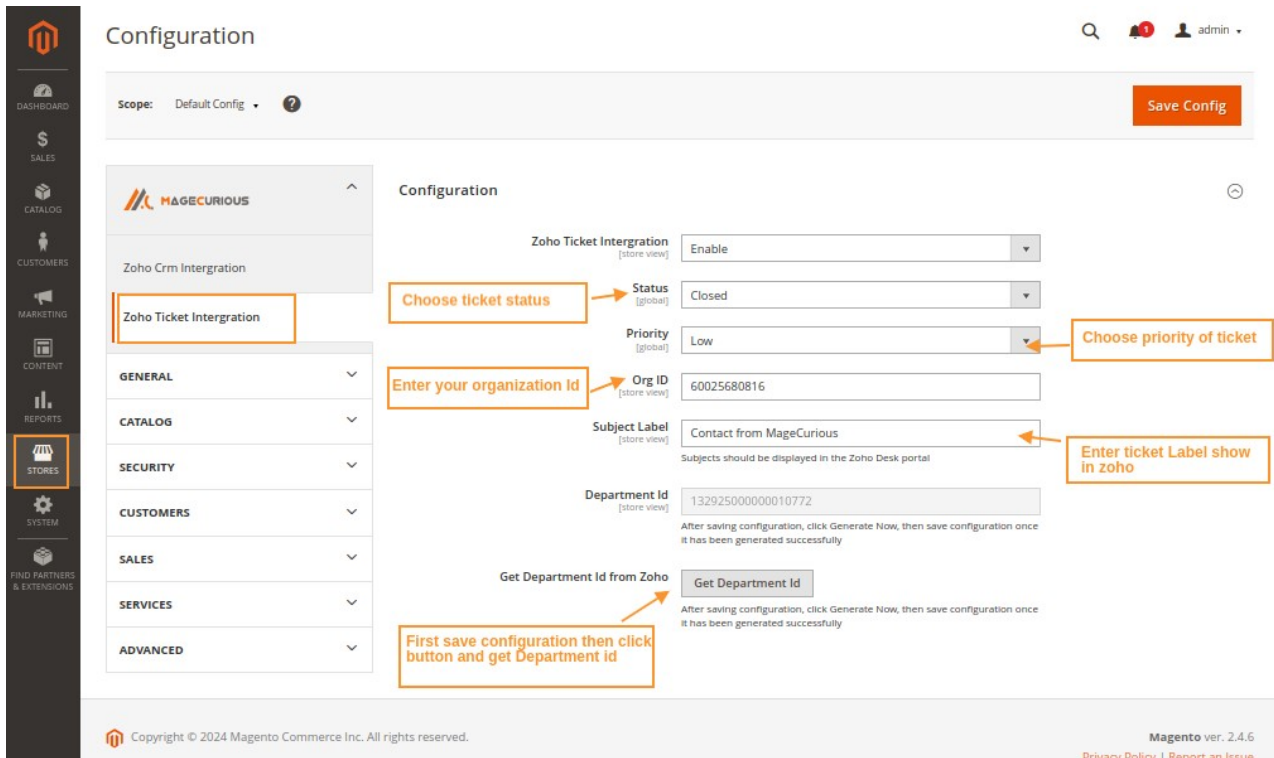


Make sure to remember or **copy** the OrgID.



## Step 5 : Zoho Ticket Intergration Configuration :

**Note : It won't work that Zoho ticket if you don't generate a refresh token in Zoho CRM's integration. Please generate a refresh token in Zoho CRM's integration section before working with that ticket.**



- > **Enable Zoho Ticket Intergration** : Enable or Disable Module.
- > **Status** : You can set the status of the Label of the ticket as open, On Hold, Escalated and closed
- > **Priority** : You can set the priority of the ticket as high, medium, or low
- > **OrgId** : Enter your Desk organization Id
- > **Subject Label** : When creating a ticket in Zoho Desk, enter the label you want to display
- > **Department ID** : When you click get department ID, the field will auto-fill.
- > **Get Department Id**: Please save the configuration and click the "Get Department ID" button.

-> When you submit in the contact us page, a ticket is created in Zoho Desk.

Write us

Jot us a note and we'll get back to you as quickly as possible.

Name \*

Email \*

Phone Number

What's on your mind? \*

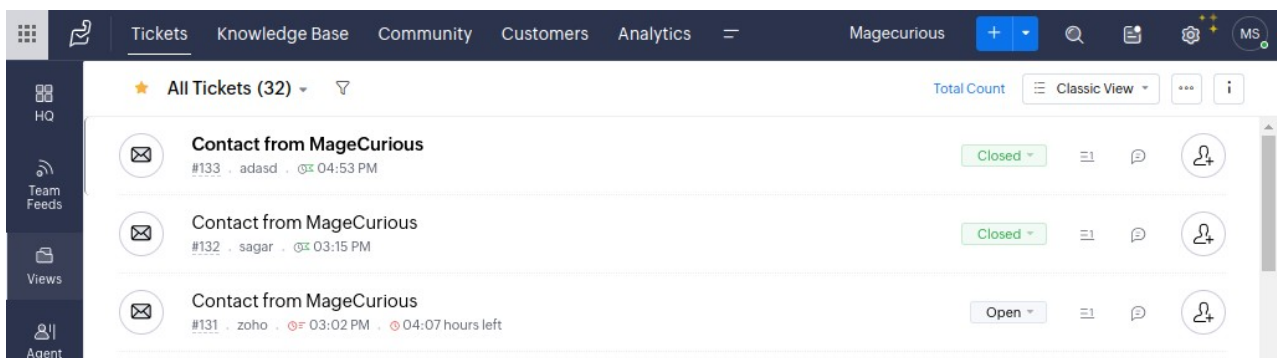
Submit click

In contact us page when you Submit then its showing in zoho Desk

About us    Privacy and Cookie Policy   

Customer Service    Search Terms

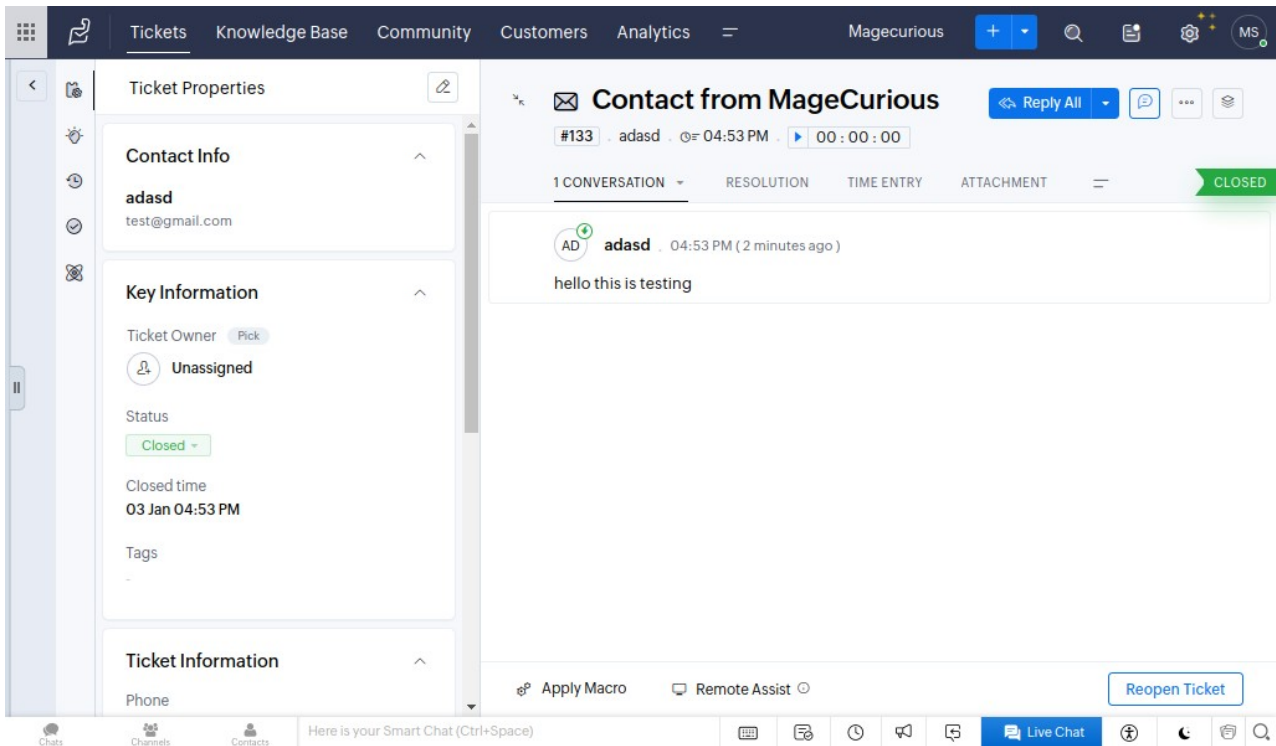
-> you can see this ticket : <https://desk.zoho.in/>



The screenshot shows the Zoho Desk interface. The top navigation bar includes 'Tickets', 'Knowledge Base', 'Community', 'Customers', and 'Analytics'. The main content area displays a list of tickets under the heading 'All Tickets (32)'. Three tickets are visible, all titled 'Contact from MageCurious'. The first two tickets are marked as 'Closed' and the third as 'Open'. Each ticket entry includes a ticket ID, a name, and a timestamp.

Ticket ID	Name	Time	Status
#133	adasd	04:53 PM	Closed
#132	sagar	03:15 PM	Closed
#131	zoho	03:02 PM	Open

The image below is an open ticket image that you can view:





**Still Have any Doubt's ?**

**No Worries Just Contact Us Using Our Email / Phone**

Phone : +91 8980534268 , +91 8160580207

Email : [support@magecurious.com](mailto:support@magecurious.com)

**Thank You !!!**