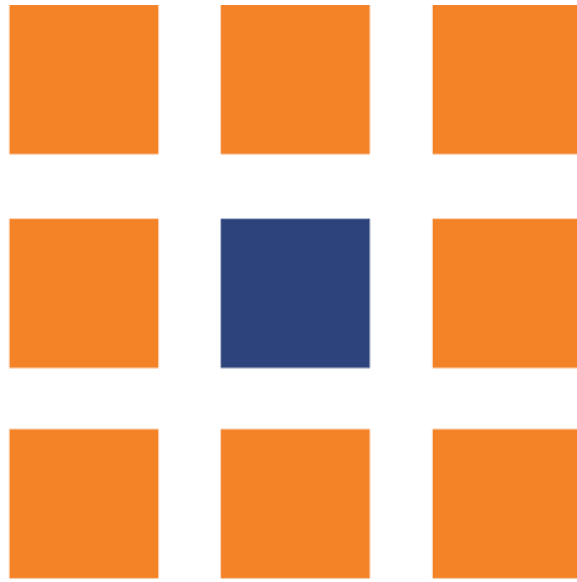




Dotsquares

Zoho CRM Integration

Magento 2 Zoho CRM Integration is a powerful solution designed to seamlessly connect your Magento 2 ecommerce store with Zoho CRM, enabling efficient management of customer data, sales, and marketing activities. This integration helps businesses automate workflows, improve customer relationship management, and boost sales performance by synchronizing data between Magento 2 and Zoho CRM in real-time.

Magento 2 Zoho CRM Integration is an extension or middleware that bridges the gap between your Magento 2 online store and Zoho CRM platform. It allows automatic synchronization of customer information, orders, products, and other relevant data, ensuring that your sales and marketing teams have access to up-to-date information without manual data entry.

Key Features of Magento 2 Zoho CRM Integration

- ✓ **Real-Time Data Synchronization**
Ensures instant and automatic syncing of data between Magento 2 and Zoho CRM, keeping both platforms up-to-date.
- ✓ **Customer Data Management**
Centralizes customer information by syncing customer profiles, enabling better customer relationship management.
- ✓ **Order and Sales Tracking**
Tracks orders and sales data from Magento 2 directly within Zoho CRM for streamlined sales monitoring and reporting.
- ✓ **Product Catalog Sync**
Synchronizes product details and inventory between Magento 2 and Zoho CRM to maintain consistency across platforms.
- ✓ **Invoice Sync**
automatically syncs invoices generated in Magento 2 with Zoho CRM for accurate financial tracking and management.

Benefits of Integrating Magento 2 with Zoho CRM

1. **Improved Sales Efficiency:** Sales teams get instant access to customer and order data, enabling faster response and better customer engagement.
2. **Enhanced Customer Insights:** Unified data helps in creating targeted marketing campaigns and personalized customer experiences.
3. **Reduced Manual Work:** Automation eliminates repetitive data entry tasks, reducing errors and saving time.

Step-by-Step Guide to Integrate Magento 2 with Zoho CRM

Install the Magento 2 Zoho CRM Extension

- Purchase or download the Magento 2 Zoho CRM integration extension from marketplace or developer store.
- Upload the extension files to your Magento 2 root directory via FTP or use Composer.
- Run Magento commands to enable the module and clear cache:

```
php bin/magento module:enable Dotsquares_ZohoCrm
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Scope: Default Config ?

Save Config

GENERAL

SECURITY

CATALOG

CUSTOMERS

BSS COMMERCE

DOTSQUARES

SFM2Connector

Zoho CRM

SALES

MAGEPLAZA EXTENSIONS

SERVICES

ADVANCED

General Configuration

Enable Module (store view) Yes

Debug Mode (global) Yes

API Configuration

Client ID (global) 1000.5HCLD3RAMBHFUXND8U0Z087XC4LD1T

Client Secret (global) *****

Redirect URI (global) https://extensionsupport.24livehost.com/zohocrm/connection/callback/
This should be your Magento admin URL followed by zohocrm/connection/callback

Connection Status Zoho CRM Connection Status

Connected to Zoho CRM

Last Token Refresh:

Token Expires:

Refresh Token

Disconnect

Data Center (global) IN (zoho.in)
Select your Zoho CRM data center.

☰

Home

Leads

Contacts

Accounts

Deals

Tasks

Meetings

Calls

Reports

Analytics

Products

Quotes

Sales Orders

Purchase Orders

⋮

All Tabs

🔍

+

📄

📄

🔔

👤

🏠 Home

CRM

SalesIQ

Desk

Projects

Brand Studio

Campaigns

Social

Marketing Automation

PageSense

⋮

In Trial

🔍 All Sales Orders

🔍

Create Sales Order

Actions

Total Records 1

10 Records Per Page

1-1

<

>

☐

Subject

All

☿

☐

Status

☐

Grand Total

☐

Contact Name

☐

Account Name

☐

Sales Order Owner

☐

☐

☐

☐

Order #000000015

processing

\$ 557.00

Dotsquares

Gayalal Sharma

Filter Sales Orders by

🔍 Search

▼ System Defined Filters

☐ Touched Records

☐ Untouched Records

☐ Record Action

☐ Related Records Action

☐ Locked

▼ Filter By Fields

☐ Account Name

☐ Adjustment

☐ Billing City

☐ Billing Code

☐ Billing Country

☐ Billing State

☐ Billing Street

☐ Carrier

☐ Contact Name

☐ Created By

☐ Created Time

☰

Home

Leads

Contacts

Accounts

Deals

Tasks

Meetings

Calls

Reports

Analytics

Products

Quotes

Sales Orders

Invoices

⋮

All Tabs

🔍

+

📄

📄

🔔

👤

🏠 Home

CRM

SalesIQ

Desk

Projects

Brand Studio

Campaigns

Social

Marketing Automation

PageSense

⋮

In Trial

🔍 All Invoices

🔍

Create Invoice

Actions

Total Records 1

10 Records Per Page

1-1

<

>

☐

Subject

All

☿

☐

Status

☐

Invoice Date

☐

Grand Total

☐

Contact Name

☐

Account Name

☐

Invoice Owner

☐

☐

☐

☐

Invoice #000000035

Created

25/04/2025

\$ 557.00

Gayalal Sharma

Filter Invoices by

🔍 Search

▼ System Defined Filters

☐ Touched Records

☐ Untouched Records

☐ Record Action

☐ Related Records Action

☐ Locked

▼ Filter By Fields

☐ Account Name

☐ Adjustment

☐ Billing City

☐ Billing Code

☐ Billing Country

☐ Billing State

☐ Billing Street

☐ Contact Name

☐ Created By

☐ Created Time

☐ Deal Name

System

Dashboard

Salesforce Connector

Sales

Catalogs

Customers

Marketing

Content

Reports

Stores

System

Find Partners & Extensions

Data Transfer

Tools

Other Settings

Import

Cache Management

Notifications

Export

Index Management

Custom Variables

Import/Export Tax Rates

Permissions

Manage Encryption Key

Import History

All Users

Zoho CRM

Services

Locked Users

Configuration

Commerce Services Connector

User Roles

Zoho CRM Sync History

Extensions

Action Logs

Customer Sync History

Integrations

Bulk Actions

Product Sync History

Order Sync History

Invoice Sync History

System Messages: 1

admin

Reload Data

Go to Advanced Reporting

reports tailored to your customer data.

the chart, click [here](#).

Tax

Shipping

Quantity

\$0.00

\$5.00

1

View Products

New Customers

Customers

	Price	Quantity
Mobile Phone with Camera Control	\$969.00	6
128GB, Silver) - Pristine - Unlocked	\$557.00	1

Customer Sync History

admin

Sync Customers

Search by keyword

Filters

Default View

Columns

1 records found

20 per page

1 of 1

ID	Customer ID	Zoho ID	Sync Message	Sync Status	Last Sync	Action
1	6	650879000000962001	Successfully synced to Zoho CRM	success	2025-04-21 02:52:22	

Product Sync History

admin

Sync Products

Search by keyword

Filters

Default View

Columns

57 records found

20 per page

1 of 3

ID	Product ID	Zoho ID	Sync Message	Sync Status	Last Sync	Action
57	3791	650879000001039753	Successfully synced to Zoho CRM	success	2025-04-25 00:30:33	
56	3790	650879000001049716	Successfully synced to Zoho CRM	success	2025-04-25 00:30:32	
55	3789	650879000001044726	Successfully synced to Zoho CRM	success	2025-04-25 00:30:32	
54	3788	650879000001037765	Successfully synced to Zoho CRM	success	2025-04-25 00:30:32	
53	3787	650879000001037760	Successfully synced to Zoho CRM	success	2025-04-25 00:30:32	
52	3786	650879000001039748	Successfully synced to Zoho CRM	success	2025-04-25 00:30:31	
51	3785	650879000001037755	Successfully synced to Zoho CRM	success	2025-04-25 00:30:31	
50	3784	650879000001041751	Successfully synced to Zoho CRM	success	2025-04-25 00:30:31	
49	3783	650879000001041746	Successfully synced to Zoho CRM	success	2025-04-25 00:30:31	
48	3782	650879000001044721	Successfully synced to Zoho CRM	success	2025-04-25 00:30:30	
45	3779	650879000001039743	Successfully synced to Zoho CRM	success	2025-04-25 00:30:30	
46	3780	650879000001044716	Successfully synced to Zoho CRM	success	2025-04-25 00:30:30	

Order Sync History

Sync Orders

Search by keyword 🔍

⌵ Filters 👁 Default View ⌵ ⚙ Columns ▾

1 records found

20 ▾ per page < 1 of 1 >

ID	Order ID	Zoho ID	Sync Message	Sync Status	Last Sync	Action
1	1	650879000001037794	Successfully synced to Zoho CRM	success	2025-04-25 00:10:48	

Invoice Sync History

Sync Invoice

Search by keyword 🔍

⌵ Filters 👁 Default View ⌵ ⚙ Columns ▾

1 records found

20 ▾ per page < 1 of 1 >

ID	Invoice ID	Zoho ID	Sync Message	Sync Status	Last Sync	Action
11	1	650879000001039786	Synced successfully	success	2025-04-25 00:11:17	