



WooCommerce and Zoho CRM Connector Pro v1.0 User's Manual

Thank you for purchasing the WooCommerce and Zoho CRM Connector plugin. This brief manual will guide you through installing and using the plugin.

Installation

1. Login to your WordPress Admin and select "Plugins" > "Add New" in the left sidebar menu.
2. Click "Upload Plugin" at the top of the page.
3. Select the plugin ZIP file and click "Install Now".
4. Click "Activate Plugin".
5. Select "WooCommerce" > "Zoho CRM Connector" from the left sidebar menu.
6. Enter your license key, which was displayed after checkout and sent to you by email.
7. Click "Activate".

The plugin is now installed and ready for use. Please note that you must also have WooCommerce installed and activated in order for the WooCommerce and Zoho CRM Connector plugin to function.

Configuring the Zoho CRM Connector

1. In your WordPress Admin, select "WooCommerce" > "Zoho CRM Connector" from the left sidebar menu.
2. Enter your Zoho account email address and password. Your password will not be stored in the database and is only used for establishing the initial connection.
3. Select your integration options:
 - **Contacts:**
 - **Add new WooCommerce customers as Zoho CRM contacts:** If checked, a contact will be created in Zoho CRM after an order is placed, using the order's billing contact details.
 - **If a contact already exists for the customer, update it:** If checked, the plugin will update the contact record when it finds a match to an existing contact. If unchecked, no action will be taken (duplicate contacts are not created).
 - **Set Lead Source field:** If checked, the plugin will set the Lead Source field of the contact to "OnlineStore". However, if the contact already exists, any previous value in the Lead Source field will be overwritten.
 - **Add a note to the contact with order details:** If checked, the plugin will add a note to the new or existing contact containing the names and quantities of the products ordered. The note title will contain the order ID.

- **Leads:**
 - **Add new WooCommerce customers as Zoho CRM leads:** If checked, a lead will be created in Zoho CRM after an order is placed, using the order's billing contact details.
 - **If a lead already exists for the customer, update it:** If checked, the plugin will update the lead record when it finds a match to an existing lead. If unchecked, no action will be taken (duplicate leads are not created).
 - **Set Lead Source field:** If checked, the plugin will set the Lead Source field of the lead to "OnlineStore". However, if the lead already exists, any previous value in the Lead Source field will be overwritten.
 - **Add a note to the lead with order details:** If checked, the plugin will add a note to the new or existing lead containing the names and quantities of the products ordered. The note title will contain the order ID.
 - **Potentials:**
 - **Create a potential for the order:** If checked, the plugin will create a "Closed Won" potential for the order. The Potential Name will contain the order ID. The Amount will be set to the order total, with 100% Probability. The Account Name will be set to the billing company (if specified) or the billing name. If a contact was created or found for the order, the potential will be associated with that contact.
4. Click "Save Settings" to save your configuration and connect your Zoho CRM account.

Manually Sending Orders from the Order List

1. In your WordPress Admin, select "WooCommerce" > "Orders" from the left sidebar menu to access the order list.
 2. Click the "To Zoho CRM" button in the "Actions" column for any order to send that order to Zoho CRM.
- or*
- Select one or more orders using the checkboxes and click the "Send to Zoho CRM" button above the list to send all of the selected orders to Zoho CRM.

Manually Sending an Order from the Order Details Page

1. In your WordPress Admin, select "WooCommerce" > "Orders" from the left sidebar menu to access the order list.
2. Click an order number to access the Order Details page.
3. Under "Order Actions" in the right sidebar, choose "Send to Zoho CRM" from the dropdown menu.
4. Click the button next to the dropdown menu to send the order to Zoho CRM.

Support

If you require support for this product, please visit <http://support.potentplugins.com/>. Support is available for one year from date of purchase.

License Information

This plugin is licensed under the GNU General Public License version 2 or later (available at <http://www.gnu.org/licenses/old-licenses/gpl-2.0.en.html>).