WooCommerce and Zoho CRM Connector Pro v1.1
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.

<u>Installation</u>

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.

<u>Configuring the Zoho CRM Connector</u>

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:
   - **Automatic Processing:**
     - **Automatically process orders when they are created:** If selected, order data will be sent to Zoho CRM when WooCommerce first creates the order.
     - **Automatically process orders when their status changes to "*<status>*":** If selected, order data will be sent to Zoho CRM when the order status transitions to *<status>*. For example, you may wish to send order data when the order status changes to "Processing" (typically indicating that payment has been received), or "Completed". If you have defined custom order statuses, they should appear in the list as well. If an order transitions to the same status multiple times, the order will be processed each time.
     - **Do not automatically process orders:** If selected, the plugin will not send any order data to Zoho CRM automatically.

- **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).
  - **Trigger workflow rule:** If checked, the plugin will tell Zoho CRM to trigger the workflow rule for Contact record insertion.
  - **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).
  - **Trigger workflow rule:** If checked, the plugin will tell Zoho CRM to trigger the workflow rule for Lead record insertion.
  - **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.
- **Accounts:**
  - **Associate new Zoho CRM Contacts with an Account (create an Account if necessary):** If checked, new Contacts created by the plugin will be associated with a new or existing Account (based on the billing company name, if specified, or the billing first and last name).
  - **If a matching Account is found, update it with the customer details:** If checked, the plugin will update the Account record when it finds a match to an existing Account.
  - **Trigger workflow rule(s):** If checked, the plugin will tell Zoho CRM to trigger the workflow rule for Account record insertion or update, as applicable. If a Contact record is updated (to associate it with an Account), the workflow rule for Contact record update will be triggered as well.

- **Associate existing Zoho CRM Contacts with an Account if they are not currently part of an Account (create an Account if necessary):** If checked, the plugin will associate the Contact matching the customer's email address with a new or existing Account (based on the billing company name, if specified, or the billing first and last name), provided that the Contact is not currently associated with an Account.
        - **If an existing Zoho CRM Contact is already associated with an Account, update the Account with the customer details:** If checked, the plugin will update the Account associated with the Contact matching the customer's email address. This may include changing the Account's name. This option is not recommended unless each Contact has their own Account (i.e. one Contact per Account).
   - **Potentials:**
        - **Create a Potential for the order:** If checked, the plugin will create a Potential for the order. The Potential Name will contain the order ID. The Amount will be set to the order total. If a Contact was created or found for the order, the Potential will be associated with that Contact. If an Account was created or found for the order, the Potential will be associated with that Account; otherwise, a new Account will be created since the Potential must be associated with an Account.
        - **If a matching Potential already exists, update it:** If checked, the plugin will update the Potential record when it finds a match to an existing Potential (based on the Potential Name). If unchecked, no action will be taken (duplicate Potentials are not created).
        - **Close Potential:** If checked, the Potential's Stage will be set to "Closed Won", the Closing Date will be set to the order date, and the Probability will be set to 100%.
        - **Trigger workflow rule:** If checked, the plugin will tell Zoho CRM to trigger the workflow rule for Potential record insertion.
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.

<u>Support</u>

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

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