



FreshBooks Extension for Zoho CRM

Zoho CRM Extension



User Manual

Version 1.0

Prepared By:





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FreshBooks– Zoho CRM Extension: User Manual

1. Overview

FreshBooks products are geared mainly toward small-sized business and offer cloud-based accounting applications that manage pay bills and payroll functions. Zoho CRM Extension for FreshBooks is developed by Tiara, a Zoho Authorized Partner, and available in Zoho Marketplace for all Zoho users to deploy as an extension for Zoho CRM.

Using this extension, Zoho CRM users can easily sync the data from FreshBooks to Zoho CRM unidirectionally. FreshBooks Clients will be added as Contacts, Items as Products, Invoices as Invoices, Estimates as Quotes into the Zoho CRM account.

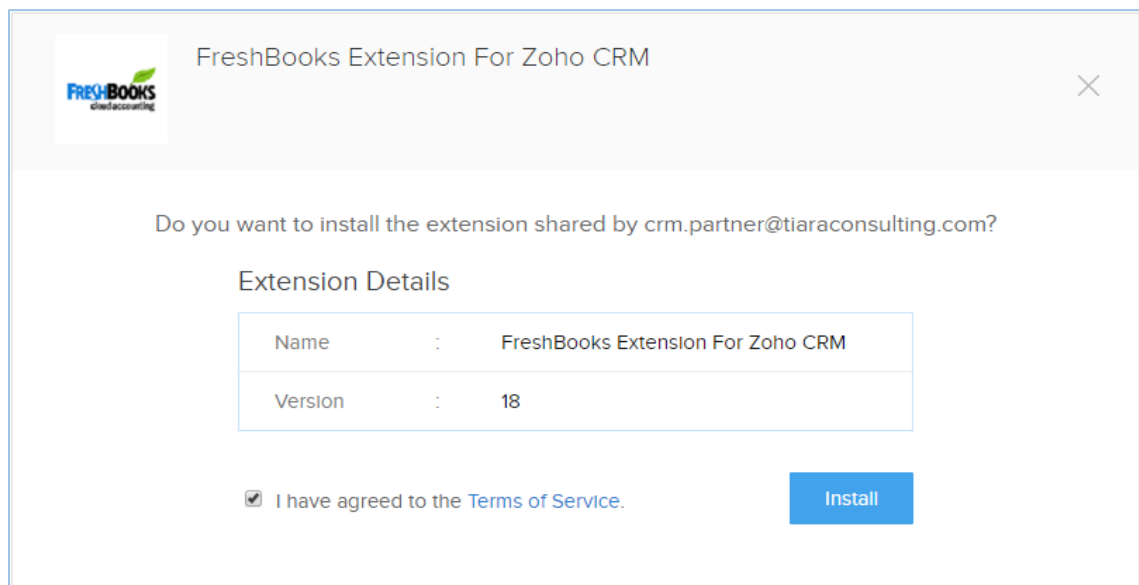
This User Manual document provides step-by-step instructions to install this extension from Zoho Marketplace, how to configure and use the integration functionality within your Zoho CRM account.

1.1. Install the FreshBooks Extension

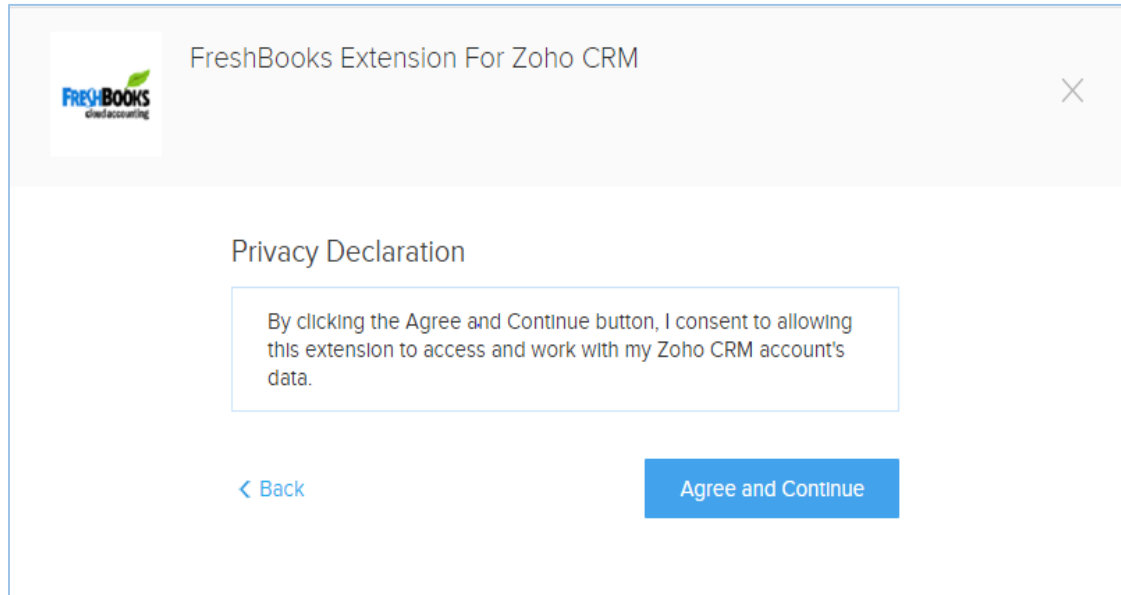
Go to Zoho Marketplace and search for “**FreshBooks**” to locate the extension and install directly from the Marketplace. Alternatively, you can install the FreshBooks extension by logging in to your Zoho CRM account and follow the below installation instructions.

To install the UltraCart Extension from Zoho CRM:

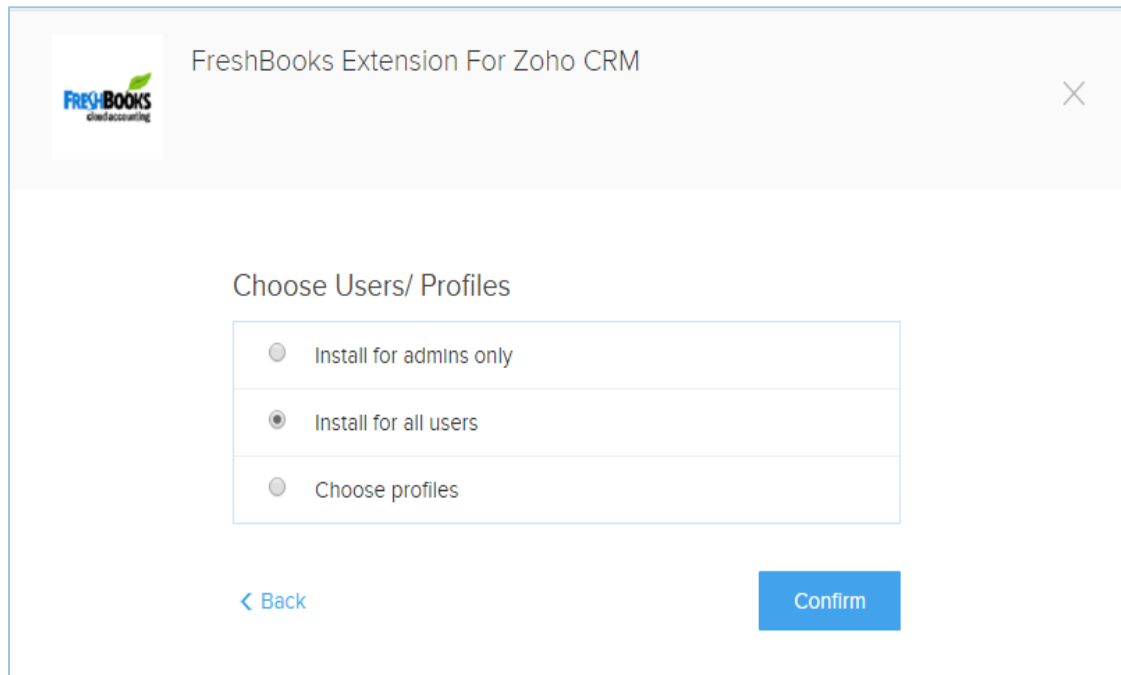
- ❖ Go to **Setup > Marketplace > All**. By default, all the Zoho Extensions currently installed within your Zoho CRM account are listed. Go to “**All Extensions**” tab to view all available Extensions.
- ❖ Click **All Extensions**, browse/search for **FreshBooks**, locate (see screenshot below) and then click the Extension. The details about the Extension will be shown as per screenshot below.
- ❖ Click **Install** button.
- ❖ Make sure you check the “Agree to the **Terms of Service**” checkbox and click **Install**.



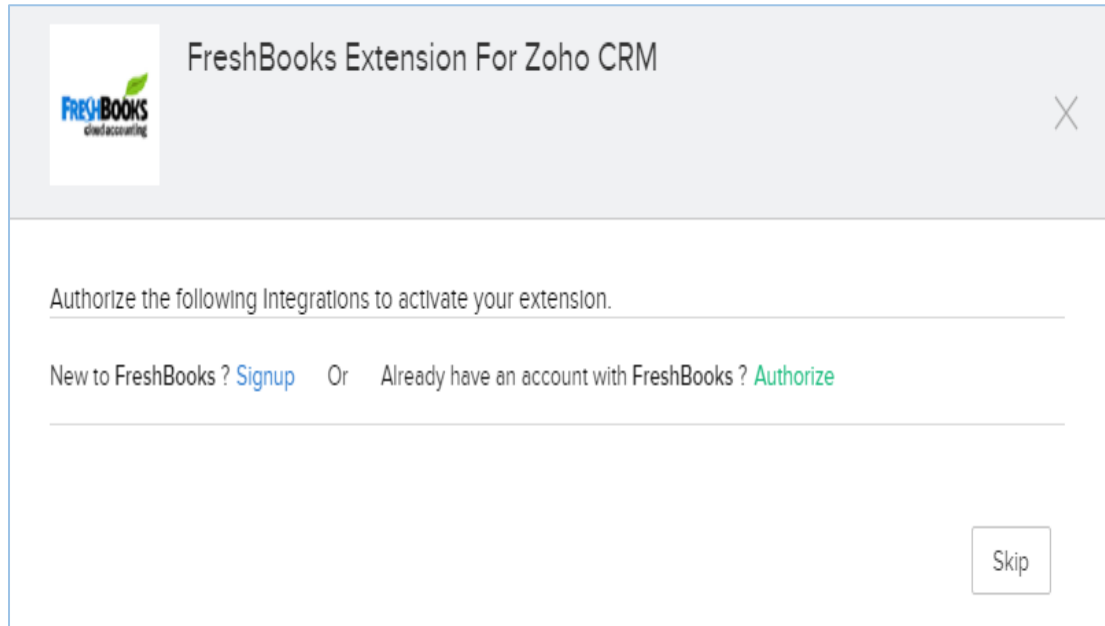
- ❖ Read the Privacy Declaration and click **Agree and Continue**



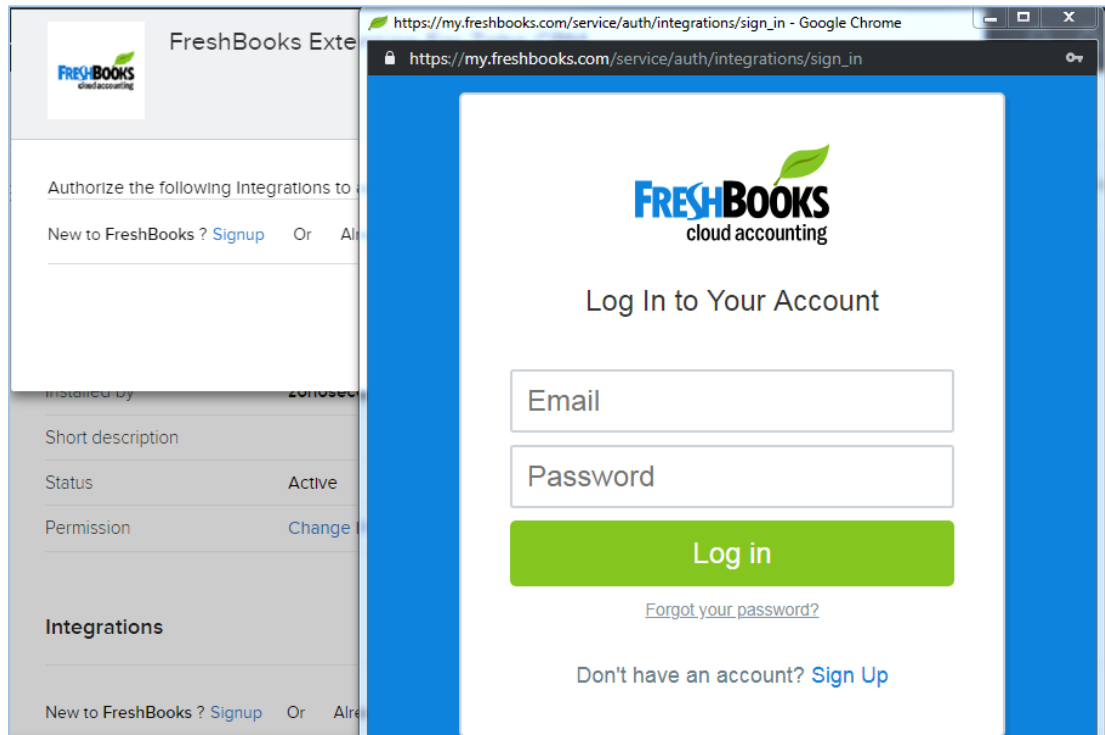
- ❖ Select the users/profiles for which the extension needs to be installed and click **“Confirm”**.



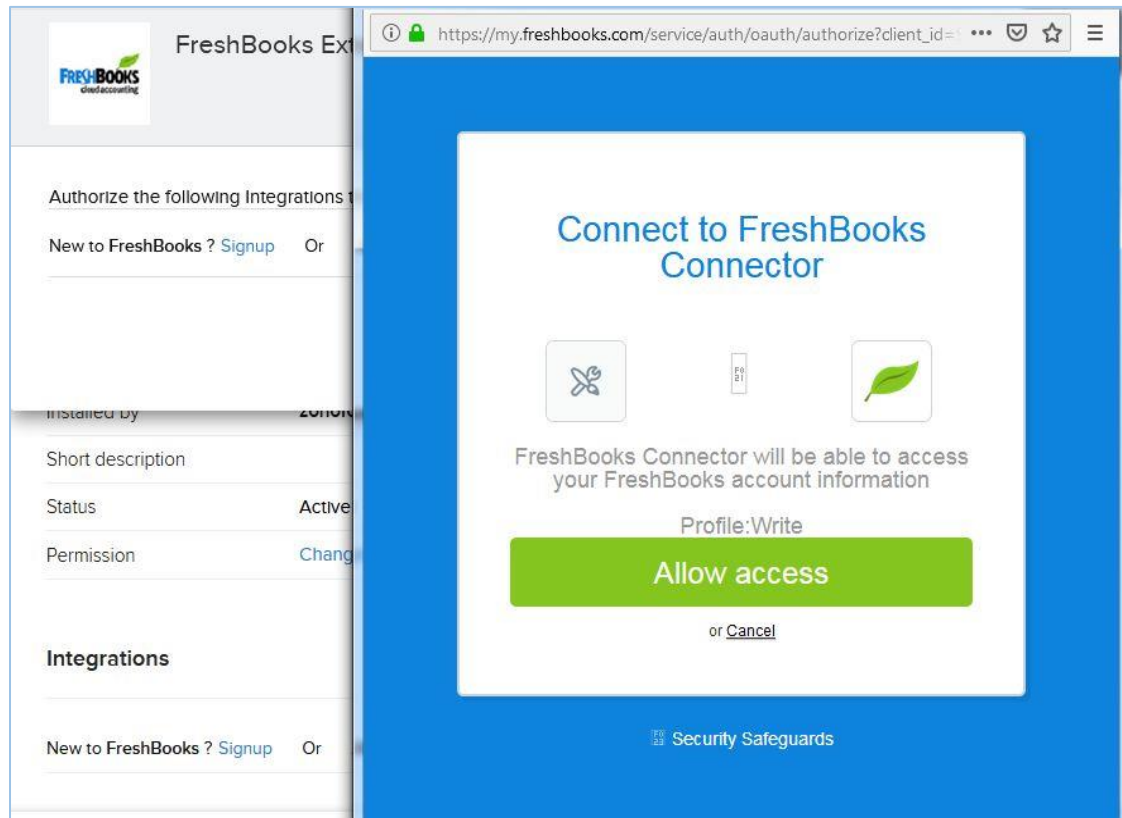
- ❖ In the pop-up, click **Authorize**.
If you skip this step, you can authorize the extension later from the **FreshBooks Extension Details** page.



- ❖ Specify the login credentials of your FreshBooks account and click **Log in**.



- ❖ After login, FreshBooks will request the permission to access the data from Zoho CRM account. Please provide the access by clicking the **Allow Access** button as shown below.



1.2. Uninstall the FreshBooks Extension for Zoho CRM

Uninstalling this extension from Zoho CRM will delete all its associated data.

To uninstall FreshBooks Extension, please follow the below steps:

- ❖ Go to **Setup > Marketplace > All > Installed tab**.
All the installed Extensions will be listed.
- ❖ Browse for **FreshBooks** and click on **Uninstall** link.
- ❖ Click **Okay** to confirm in the confirmation pop-up that follows. The Extension will be uninstalled.

2. Synchronization

After installing the extension in Zoho CRM, all the FreshBooks account’s data will synced to the Zoho CRM account once the FreshBooks Extension is authorized from Zoho CRM account. The data are synced Unidirectionally (FreshBooks → Zoho CRM).

After initial data synchronization, any data changes in Client, Items, Invoices and Estimates modules on FreshBooks will be updated or created in Zoho CRM instantaneously (Real time sync).

2.1. Sync Clients from FreshBooks to Zoho CRM Contacts

After the successful installation of the FreshBooks Extension, the following custom fields are created in contacts module of Zoho CRM.

- ❖ **Customer FID:** Text Field
- ❖ **Integrated From FreshBooks:** Checkbox

The screenshot shows the 'Create Contact' form in Zoho CRM. At the top right, there are buttons for 'Cancel', 'Save and New', and 'Save'. The form contains several input fields: 'Mobile', 'Assistant', 'Company', 'Fax', 'Date of Birth' (with a date picker icon and 'MM/DD/YYYY' placeholder), 'Asst Phone', 'Email Opt Out' (checkbox), 'Skype ID', 'Secondary Email', 'Twitter' (with a '@' icon), 'Reporting To' (with a user selection icon), and a custom field 'Customer_FID'. A red box highlights the 'Integrated From Freshbooks' checkbox, which is currently unchecked.

All the Clients data from the FreshBooks will be created in the Zoho CRM Contacts module. Any data changes in FreshBooks Clients module will be automatically created/updated in Zoho CRM Contacts.

<input type="checkbox"/>	CONTACT NAME	ACCOUNT NAME	EMAIL	PHONE	INTEGRATED FROM FRESHBOOKS	CONTACT OWNER
<input type="checkbox"/>	durga devi	tcssss	devi@gmail.com		✓	gayathri gaya...
<input type="checkbox"/>	jo joe	tcs	jo@gmail.com		✓	gayathri gaya...
<input type="checkbox"/>	dhana rajan	tcssss			✓	gayathri gaya...
<input type="checkbox"/>	priya dharshini	tiara	priya@gmail.com		✓	gayathri gaya...
<input type="checkbox"/>	sneha sneha	sneha sneha			✓	gayathri gaya...
<input type="checkbox"/>	raghul ramkish	raghul ramkish			✓	gayathri gaya...
<input type="checkbox"/>	test zoho teamclient	test zoho teamclient			✓	gayathri gaya...
<input type="checkbox"/>	tiara xvfr	tiara xvfr			✓	gayathri gaya...

Total Count 9

10 Records Per Page | < 1 to 9 >

If the Client data is deleted in FreshBooks, the same contact will be deleted automatically in the Zoho CRM Contacts module.

2.2. Sync Items from FreshBooks to Zoho CRM products

After the successful installation of the FreshBooks Extension, the following custom field is created in the Products module of the Zoho CRM.

❖ Integrated From FreshBooks: Checkbox

Create Product [Edit Page Layout](#) Cancel Save and New Save

Product Information

Product Owner: <input type="text" value="gayathri gayathri"/>	Product Name: <input type="text"/>
Product Code: <input type="text"/>	Vendor Name: <input type="text"/>
Product Active: <input checked="" type="checkbox"/>	Manufacturer: <input type="text" value="-None-"/>
Product Category: <input type="text" value="-None-"/>	Sales Start Date: <input type="text" value="MM/DD/YYYY"/>
Sales End Date: <input type="text" value="MM/DD/YYYY"/>	Support Start Date: <input type="text" value="MM/DD/YYYY"/>
Support End Date: <input type="text" value="MM/DD/YYYY"/>	

Integrated From Freshbooks

All the Items from FreshBooks will be created in the Zoho CRM Products module. Any data changes in FreshBooks Items module will be automatically created/updated in Zoho CRM Products module.

	PRODUCT NAME	PRODUCT CODE	PRODUCT ACTIVE	INTEGRATED FROM FRESHBOOKS	PRODUCT OWNER
<input type="checkbox"/>	zohobook	70894	✓	✓	gayathri gayathri
<input type="checkbox"/>	watch	70690	✓	✓	gayathri gayathri
<input type="checkbox"/>	test test product	70688	✓	✓	gayathri gayathri
<input type="checkbox"/>	test pro	70626	✓	✓	gayathri gayathri
<input type="checkbox"/>	bottless	63186	✓	✓	gayathri gayathri
<input type="checkbox"/>	ring	62832	✓	✓	gayathri gayathri
<input type="checkbox"/>	bag	62828	✓	✓	gayathri gayathri
<input type="checkbox"/>	laptop	62824	✓	✓	gayathri gayathri

Total Count: 12 20 Records Per Page < 1 to 12 >

If any Item is deleted in the FreshBooks, the same information will be deleted automatically in the Zoho CRM Products module.

2.3. Sync Estimate from FreshBooks to Zoho CRM Quotes

After the successful installation of the FreshBooks Extension, the following custom fields are created in the Quotes module of Zoho CRM.

- ❖ **Integrated from FreshBooks:** Checkbox
- ❖ **FreshBooks Quote Stage:** Drop Down

Create Quote [Edit Page Layout](#) Cancel Save and New Save

Quote Information

Quote Owner: gayathri gayathri	Deal Name: <input type="text"/>
Subject: <input type="text"/>	Valid Until: MM/DD/YYYY
Quote Stage: Draft	Contact Name: <input type="text"/>
Team: <input type="text"/>	Account Name: <input type="text"/>
Carrier: FedEx	FreshBooks Quote Stage: -None-

Integrated From Freshbooks

After successful installation and authorization of the extension, all the Estimates from FreshBooks will be created in Zoho CRM Quotes module. Any data changes in the FreshBooks estimates module will be automatically created/updated in Zoho CRM Quotes module.

	SUBJECT	QUOTE STAGE	GRAND TOTAL	DEAL NAME	CONTACT NAME	ACCOUNT NAME	QUOTE OWNER
<input type="checkbox"/>	0000001		\$1,908,080.00		prya dharshini		gayathri gayat...
<input type="checkbox"/>	0000002		\$500.00		durga devi		gayathri gayat...
<input type="checkbox"/>	0000004		\$19,000.00		durga devi		gayathri gayat...

Total Count: 3

10 Records Per Page

< 1 to 3 >

If any Estimate deleted in the FreshBooks, the same information will be deleted automatically in the Zoho CRM Quotes module.

2.4. Sync Invoices from FreshBooks to Zoho CRM Invoices

After the successful installation of the FreshBooks Extension, the following custom fields are created after in the Zoho CRM Invoices module.

- ❖ **Integrated from FreshBooks:** Checkbox
- ❖ **FreshBooks Invoice Status:** Drop Down

Create Invoice [Edit Page Layout](#)

Subject <input type="text"/>	Purchase Order <input type="text"/>
Invoice Date <input type="text" value="03/21/2019"/>	Excise Duty \$ <input type="text"/> ⓘ
Due Date <input type="text" value="MM/DD/YYYY"/>	Status <input type="text" value="Created"/>
Sales Commission \$ <input type="text"/> ⓘ	Integrated From Freshbooks <input type="checkbox"/>
Account Name <input type="text"/> ⓘ	
Contact Name <input type="text"/> ⓘ	
Freshbook Invoice Status <input type="text" value="-None-"/>	

After successful installation and authorization of the extension, all the invoices from FreshBooks will be created in Zoho CRM Invoice module. Any data changes in the FreshBooks invoices will be automatically created/updated in the Zoho CRM Invoices module.

SUBJECT	GRAND TOTAL	CONTACT NAME	ACCOUNT NAME	FRESHBOOK INVOICE STATUS	INTEGRATED FROM FRESHBOOKS	IN
0000002	\$19,000.00	jo joe		Draft	✓	g
0000003	\$1,908,080.00	durga devi		Draft	✓	g
0000004	\$19,000.00	jo joe		Draft	✓	g
0000005	\$19,000.00	durga devi		Draft	✓	g
0000006	\$500.00	raghul ramkish		Draft	✓	g
0000007	\$500.00	durga devi		Draft	✓	g
0000008	\$8,908.00	durga devi		Draft	✓	g
0000009	\$19,000.00	durga devi		Draft	✓	g

If any Invoice is deleted in the FreshBooks, the same information will be deleted automatically in the Zoho CRM Invoices module

3. FreshBooks Sync History

FreshBooks Sync History module is a custom module that will be created inside the Zoho CRM account to which will show the Integration statistics. Total Run status shows the details of the integrated records from FreshBooks to Zoho CRM in respective modules. Below are the details of the custom tabs created by the extension within FreshBooks sync history module.

- ❖ Customer
- ❖ Invoices
- ❖ Products
- ❖ Estimates

The “**Customer**” tab will show the last 5 synced customer records in the grid with the details of Customer’s Name, Customer FID, Email and Phone number.

Freshbooks Sync History

Total Run Status

Total Customers 9	Total Products 10	Total Invoices 8	Total Quotes 3
-----------------------------	-----------------------------	----------------------------	--------------------------

Last 5 Records

Customers	Products	Invoices	Quotes
Customer Name	Email	Customer FID	Phone
durga devi	devi@gmail.com		
sneha sneha			
jo joe	jo@gmail.com		
raghul ramkish			

The “**Products**” tab will show the last 5 synced Products records with the details of Product Name, Unit Price, Product FID and Quantity in stock details.

Freshbooks Sync History

Total Run Status

Total Customers 9	Total Products 10	Total Invoices 8	Total Quotes 3
-----------------------------	-----------------------------	----------------------------	--------------------------

Last 5 Records

Customers	Products	Invoices	Quotes
Product Name	Unit Price	Product FID	Quantity In Stock
tirara phone	234	tirara phone	0
botyle	121	botyle	0
zohobook	345	zohobook	0
watch	1234	watch	0

The “**Quotes**” tab will show the last 5 synced Invoices in the grid with the details of Quote Number, Email, Total Amount and FreshBooks Quotes Stage details.

Freshbooks Sync History

Total Run Status

Total Customers
9

Total Products
10

Total Invoices
8

Total Quotes
3

Last 5 Records

Customers	Products	Invoices	Quotes		
		Quote Number	Email	Total Amount	Phone
		0000001	undefined	1908080	undefined
		0000002	undefined	500	undefined
		0000004	undefined	0	undefined

If you select the “**Invoices**” tab last 5 synced Invoices records shown in the table with Invoice Date, Invoice Number, Total Amount, FreshBooks Invoice Status details.

Freshbooks Sync History

Total Run Status

Total Customers
9

Total Products
10

Total Invoices
8

Total Quotes
3

Last 5 Records

Customers	Products	Invoices	Quotes		
		Invoice Date	Invoice Number	Total Amount	Freshbooks Status
		2019-03-15	0000002	0	
		2019-03-15	0000003	1908080	
		2019-03-15	0000004	0	
		2019-03-15	0000005	0	

4. FreshBooks Error Log

FreshBooks Error Log module is a custom module that is used to manage the records that are not integrated with the Zoho CRM from FreshBooks. The error log will show the record that are not integrated with the reason for the integration failure. Following are the custom fields that are created by the extension within FreshBooks Error log module.

- ❖ **FreshBooks Error Log Name:** Text Field
- ❖ **Module Name:** Drop Down
- ❖ **FreshBooks ID:** Text Field
- ❖ **Error Reason:** Text Area
- ❖ **Is Webhook:** Checkbox
- ❖ **Is Bulk:** Checkbox
- ❖ **Page No:** Integer
- ❖ **Page per Page:** Integer

<input type="checkbox"/>	FRESHBOOKS ERROR LOG NAME	FRESHBOOKS ERROR LOG OWNER	ERROR REASON	MODULE NAME	MODIFI
<input type="checkbox"/>	Invalid Data	gayathri gayathri	Invoice Not found	Invoices	Mar 21,
<input type="checkbox"/>	Invalid Data	gayathri gayathri	Client Not Found	Invoices	Mar 21,

Total Count: 2 10 Records Per Page < 1 to 2 >

5. Support Contacts for FreshBooks Extension – Tiara Help Desk.

Thank you for installing FreshBooks extension. If you have any questions or facing installation issues, Please contact Tiara support Desk for Zoho extensions via email at zohosupport@tiraconsulting.com or call us at **(925) 218 4080**.