



Shopify Order Management for Zoho CRM

Zoho CRM Extension



User Manual

Version 1.0

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Shopify – Zoho CRM Extension: User Manual

1. Overview

Shopify is a complete e-commerce platform that lets you start, grow, and manage a business. With Shopify, you can create and customize an online store, manage products, payments, inventory and shipping. Zoho CRM Extension for Shopify 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 between Shopify and Zoho CRM bidirectionally. Shopify Customer will be added as Contacts, Products as Products, Orders as Sales Order into the Zoho CRM account and vice-versa.

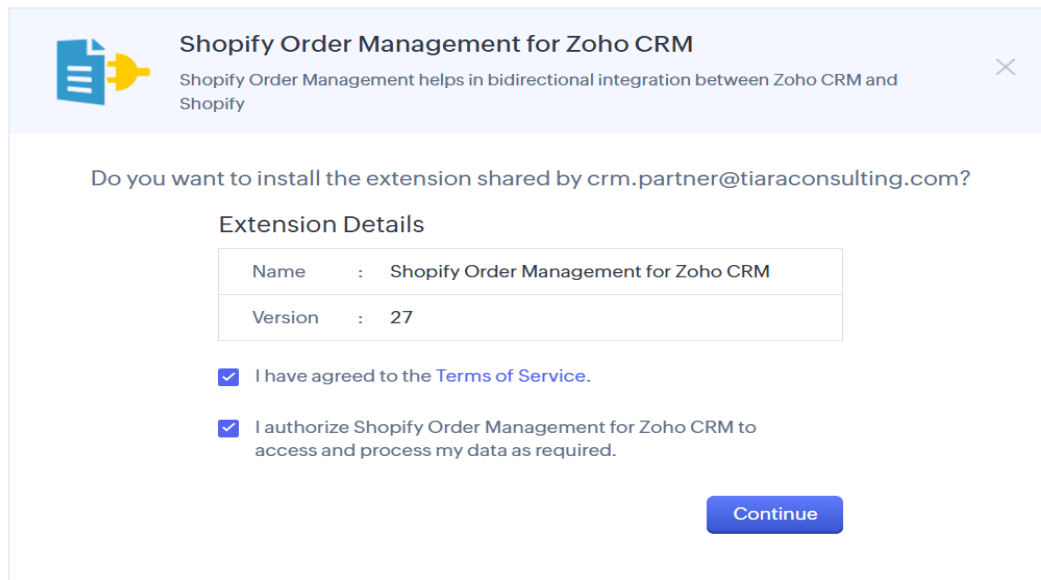
This User Manual document provides step-by-step instructions to install this extension from Zoho Marketplace, how to configure and use the integration functionality within your Zoho CRM account.

1.1. Install the Shopify Extension

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

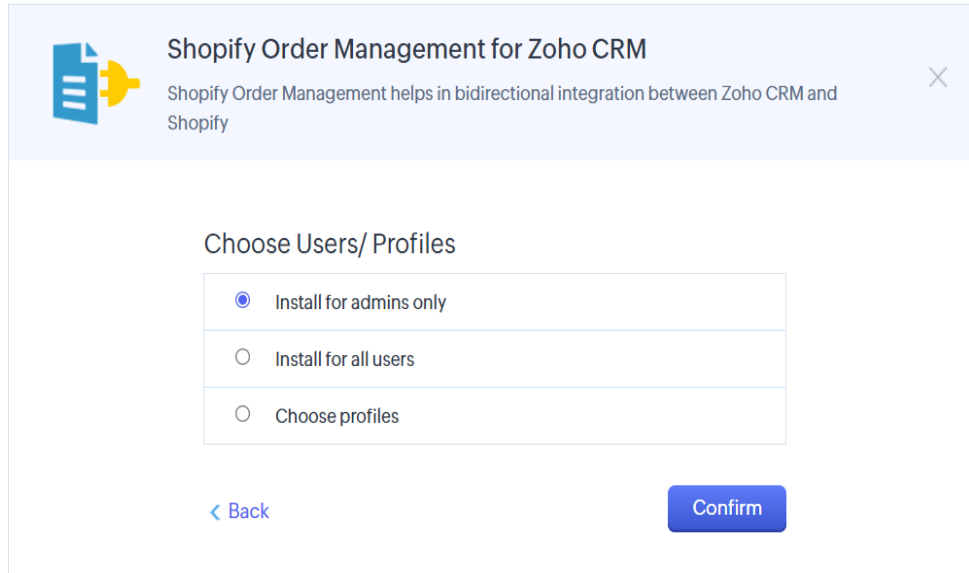
To install the Shopify Order Management for Zoho CRM:

- ❖ 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 **Shopify Order Management for Zoho CRM**, locate and then click the Extension. The details about the Extension will be shown as per the 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**

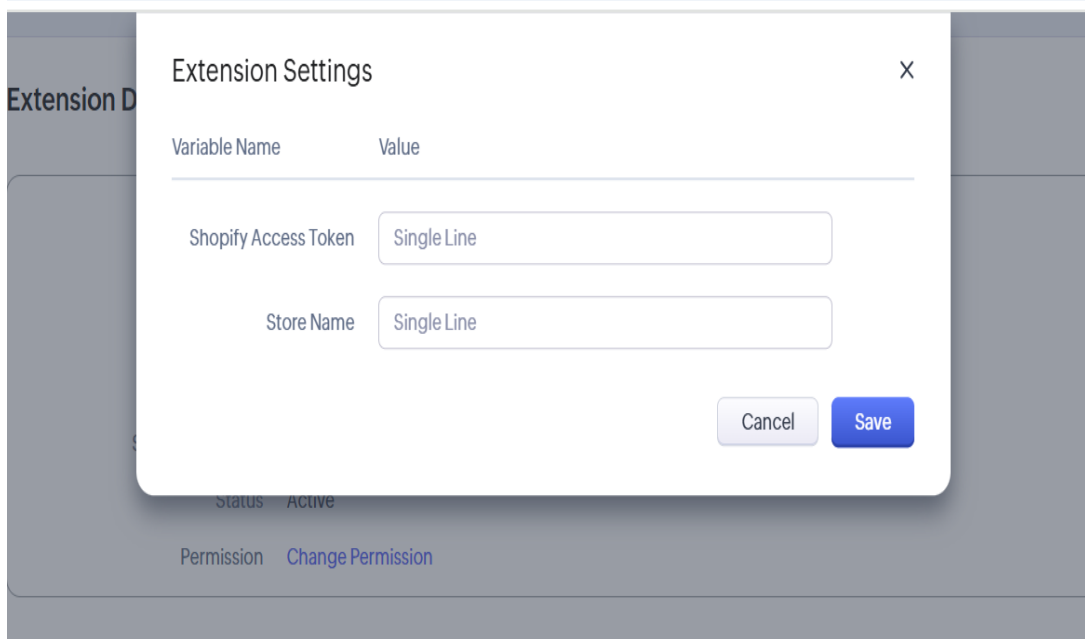


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- ❖ Select the users/profiles for which the extension needs to be installed and click “**Confirm**”.



- ❖ Enter the Shopify Credentials (Access Token and Store Name are mandatory) to start working with this extension. The way to find you the Shopify credentials as follows in next topic.



1.2. Finding Your Shopify Credentials

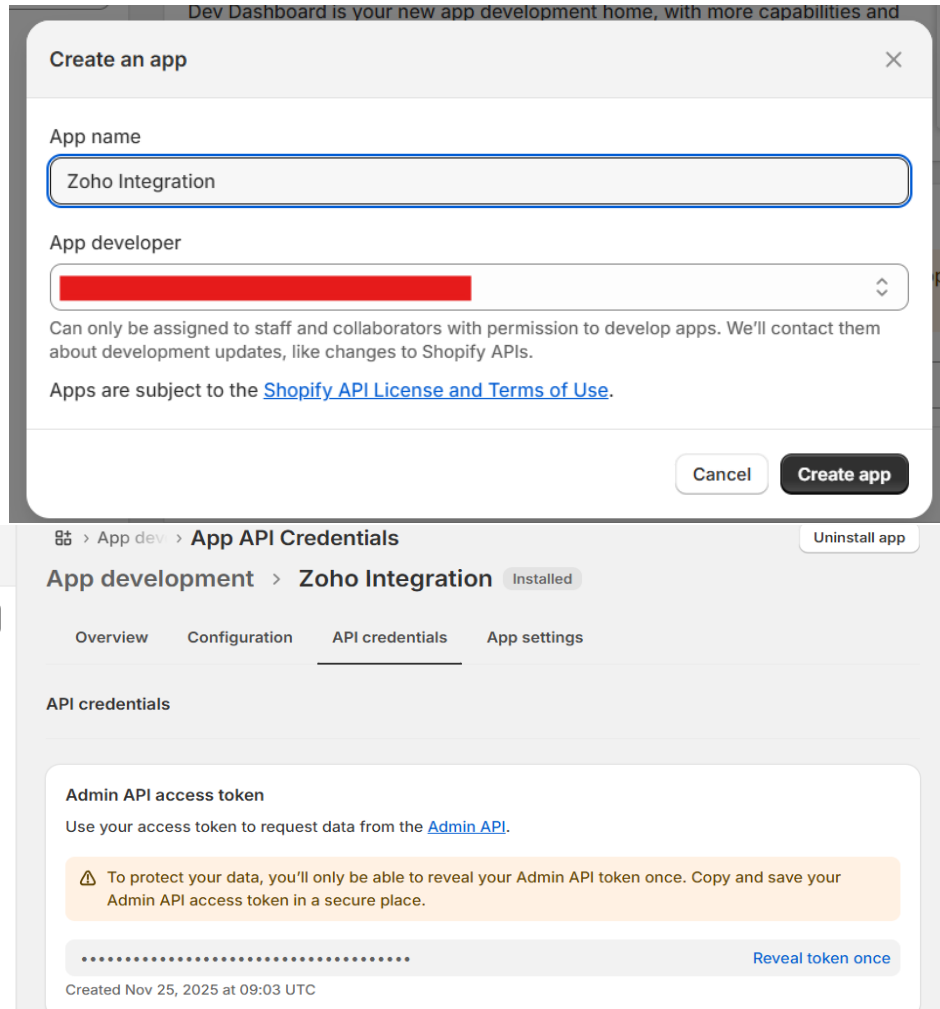
To activate Shopify Order Management for Zoho CRM. The below mentioned credentials are mandatory. This section explains each of the credential information that has to be entered while installing the extension as shown in the screen shot below.

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Login to the Shopify account.

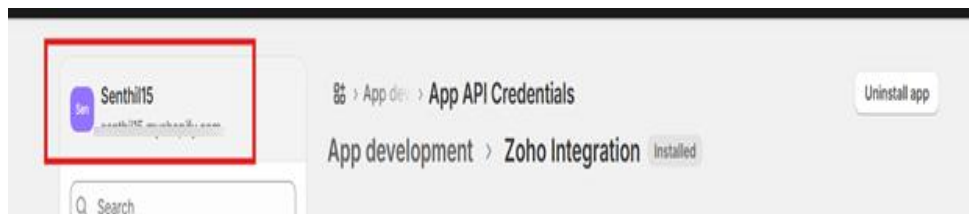
❖ **Access Token:**

Go to Settings ->Apps and sales channels ->Create an app - > App Name - > Create App - > Configure the scopes ->Reading a customer, products, orders are needed - > Install the app - > API Credentials - > Note down the Access Token



❖ **Store Name:**

The below image shows the store name



1.3. Uninstall the Shopify Order Management for Zoho CRM

Uninstalling this extension from the Zoho CRM will delete all its associated data. To uninstall Shopify Order Management for Zoho CRM, please follow the below steps:

- ❖ Go to **Setup > Marketplace > All > Installed tab**.
All the installed Extensions will be listed.
- ❖ Browse for **Shopify Order Management for Zoho CRM** and click on the **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, a schedule runs at 6:30 PM (Zoho Time) that syncs the last one week of Shopify orders to the Zoho CRM Sales Orders module. These records are synced unidirectionally (**Shopify → Zoho CRM**).

After the initial data synchronization, any order updates made in Shopify will be synced to Zoho CRM hourly.

For **Zoho CRM → Shopify**, a workflow is triggered as soon as a record is created in the Contacts, Products, or Sales Orders modules of Zoho CRM, and the corresponding record will be created in Shopify.

Additionally, **real-time Sales Order Creation** occurs from Shopify to Zoho CRM, including associated products and customers.

Hence, the extension supports **bidirectional** synchronization.

2.1. Sync Customer from Shopify to Zoho CRM Contacts

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

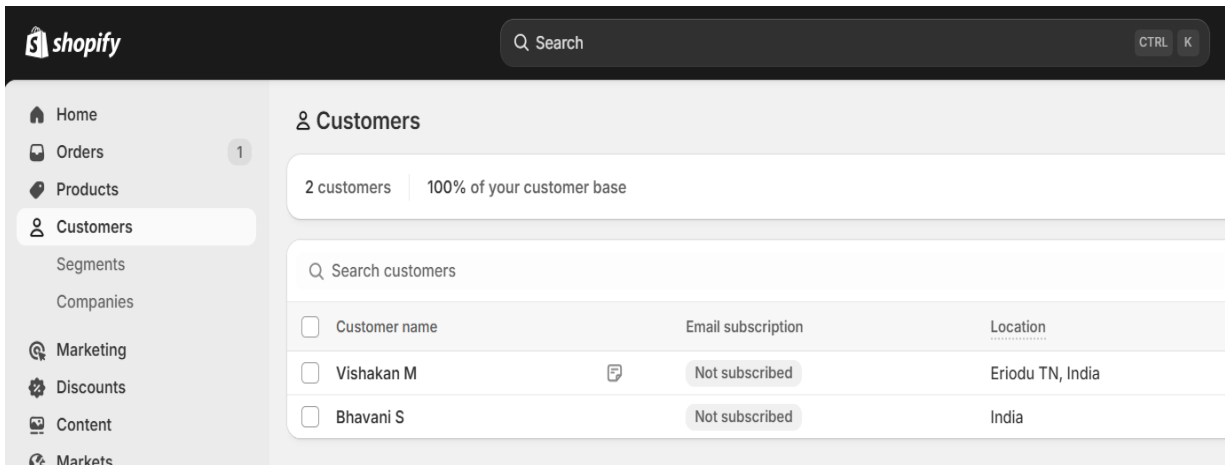
- ❖ **Shopify Customer:** Checkbox
- ❖ **Shopify ID:** Text Area

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

Email Title
 Phone Department
 Other Phone Home Phone
 Mobile Fax
 Assistant Date of Birth MMM D, YYYY
 Shopify Customer Asst Phone
 Email Opt Out Skype ID
 Secondary Email
 Twitter @
 Reporting To
 Shopify ID

The Customer data from the Shopify Orders will be created as Contacts in the Zoho CRM Contacts module.



2.2. Sync Products from Shopify to Zoho CRM products

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

- ❖ **Shopify Product:** Checkbox
- ❖ **Shopify ID:** Text Area
- ❖ **Variant ID:** Text Area

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

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="MMM D, YYYY"/>
Sales End Date	<input type="text" value="MMM D, YYYY"/>	Support Start Date	<input type="text" value="MMM D, YYYY"/>
Support End Date	<input type="text" value="MMM D, YYYY"/>	Shopify Product	<input type="checkbox"/>
Shopify ID	<input type="text"/>	Variant ID	<input type="text"/>

Price Information

Unit Price	<input type="text"/>	Commission Rate	<input type="text"/>
Tax	<input type="text" value="None"/>	Taxable	<input checked="" type="checkbox"/>

2.3. Sync Order from Shopify to Zoho CRM Sales Order

After the successful installation of the Shopify Extension, the following custom fields are created in the Zoho CRM Sales order module.

- ❖ **Shopify Financial Status:** Text Area
- ❖ **Shopify Fulfillment Status:** Text Area
- ❖ **Shopify ID:** Text Area
- ❖ **Shopify Order:** Boolean
- ❖ **Shopify Tracking Company:** Text Area
- ❖ **Shopify Tracking Number:** Text Area
- ❖ **Shopify Currency:** Text Area

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Create Sales Order [Edit Page Layout](#)

Cancel Save and New Save

Subject	<input type="text"/>	Purchase Order	<input type="text"/>
Customer No.	<input type="text"/>	Due Date	MMM D, YYYY
Quote Name	<input type="text"/>	Contact Name	<input type="text"/>
Pending	<input type="text"/>	Excise Duty	\$ <input type="text"/>
Carrier	FedEX	Status	Created
Sales Commission	\$ <input type="text"/>	Shopify Order	<input type="checkbox"/>
Account Name	<input type="text"/>	Shopify Tracking Company	<input type="text"/>
Shopify ID	<input type="text"/>	Shopify Fulfillment status	<input type="text"/>
Shopify Financial Status	<input type="text"/>		
Shopify Tracking Number	<input type="text"/>		
Shopify Currency	<input type="text"/>		

3. Custom Button Actions

After the successful installation of the Shopify Extension, the following button is created in the Sales Orders module of the Zoho CRM.

- ❖ Get Order Status (Module: Sales Orders. Position: List View – Each Record)
- ❖ Get Bulk Order Status (Module: Sales Orders. Position: List View – Mass Action Position)

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3.1. Button – Get Order Status

In Sales Orders, we have created **“Get Order Status”** button in List View -Each Record. By clicking this button will get you current Status of the Shopify Order and it will update the status back into "Shopify Fulfillment status" field in Sales Order.

Button – Get Order Status in List view for Each Record.

	S...	All	Grand Total	Contact ...	Shopify ID	Shopify Or...	
<input type="checkbox"/>	#1006		\$ 49,050.00	Saadhu M	6481712840050	✓	Get Order Status
<input type="checkbox"/>	#1008		\$ 49,050.00	Saadhu M	6481712840050	✓	Get Order Status
<input type="checkbox"/>	#1007		\$ 40.00	Vishakan M	6481712840050	✓	Get Order Status
<input type="checkbox"/>	#1005		\$ 292.05	Saadhu M	6481712840050	✓	Get Order Status
<input type="checkbox"/>	#1009		\$ 49,050.00	Bhavani S	6481712840050	✓	Get Order Status
<input type="checkbox"/>	#1010		\$ 272.50	Bhavani S	6481712840050	✓	Get Order Status
<input type="checkbox"/>	#1013		\$ 1,321.21	Sundar Bala	6481712840050	✓	Get Order Status

On clicking the button, it shows the current status and update in the Sales Order Record.

Message Content

Subject: #1006 -> unfulfilled

Background table (same as above):

	S...	All	Grand Total	Contact ...	Shopify ID	Shopify Or...	
<input type="checkbox"/>	#1006		\$ 49,050.00	Saadhu M	6481712840050	✓	Get Order Status
<input type="checkbox"/>	#1008		\$ 49,050.00	Saadhu M	6481712840050	✓	Get Order Status
<input type="checkbox"/>	#1007		\$ 40.00	Vishakan M	6481712840050	✓	Get Order Status
<input type="checkbox"/>	#1005		\$ 292.05	Saadhu M	6481712840050	✓	Get Order Status
<input type="checkbox"/>	#1009		\$ 49,050.00	Bhavani S	6481712840050	✓	Get Order Status
<input type="checkbox"/>	#1010		\$ 272.50	Bhavani S	6481712840050	✓	Get Order Status
<input type="checkbox"/>	#1013		\$ 1,321.21	Sundar Bala	6481712840050	✓	Get Order Status

3.2. Button - Get Bulk Order Status

In Sales Order list view, we have created **“Get Bulk Order Status”** button in List View - Mass Action Position. When you selecting Sales Order (By clicking check box) you can see the Get Bulk Order Status button. By clicking the Get Bulk Order Status button will get you current Status of all the Sales Order and update the status back into "Shopify Fulfillment Status" field in Sales Orders.

Button – Get Bulk Order Status in List view for Mass Action.

<input checked="" type="checkbox"/>	Subject	All ▾	≡	Status	≡	Grand Total	≡	Deal Name	≡	Contact Name	≡
<input checked="" type="checkbox"/>	#1004					\$ 45,000.00				Vishakan M	
<input checked="" type="checkbox"/>	#1003					\$ 46,597.50				Bhavani S	

On clicking the button, it shows the current status of the selected sales orders and update in the Sales Order Record

Message Content ✕

Summary: Updated: 2 | Missing Shopify ID: 0 | Shopify Order Not Found: 0 | Details: | Subject: #1004 -> unfulfilled | Subject: #1003 -> unfulfilled

4. Support Contacts for Shopify Extension – Tiara Help Desk

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