

# **Quote Sync to Deal**

# **Zoho CRM Extension**



# **User Manual**

# Version 1.0

**Prepared By:** 



www.dhruvsoft.com





# **Table of Contents**

1. Overview	. 3
1.1. Install the Quote Sync to Deals Extension	. 3
1.2. Uninstall the Quote Sync to Deals Extension for Zoho CRM	5
2. Synchronization	. 5
2.1. Deals Module	5
2.2. Creating a Deal	. 6
2.3. Creating a Quote	. 8
2.4. Quote Sync to Deal	10
2.5. Deal Products Module	11
2.6. On deleting the Synced Quote	13
3. Support Contacts for Quote Sync to Deals Extension –Dhruvsoft Help Desk	13





# Quote Sync to Deals - Zoho CRM Extension: User Manual

#### 1. Overview

Quote Sync to Deals helps in synchronizing quotation in Zoho CRM with the deal module for each record. This includes updating the quotation amount to reflect the deal amount, updating the relevant products in the details and summarizing the product lines associated with the deals. Each product listed in the quote items of the synced quote results in creating a new record within the Deal Products (custom) module. This feature facilitates detailed tracking and management of products associated with deals. Simplifies management and avoids confusion by focusing on the most recent synced quote data.

Quote Sync to Deals for Zoho CRM is a Zoho CRM Extension developed by Dhruvsoft Services Private Limited, a Zoho Partner, and available in Zoho Marketplace for all Zoho users to deploy as an extension for Zoho CRM.

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

#### 1.1. Install the Quote Sync to Deals Extension

You can either go to Zoho Marketplace and search for **"Quote Sync to Deals"** to locate and install the extension directly from the Marketplace. Alternatively, you can install the "Quote Sync to Deals" extension by logging in to your Zoho CRM account and following the below installation instructions.

To install the Quote Sync to Deals Extension from within Zoho CRM:

- Go to the Setup > Marketplace > All. By default, all the Zoho extensions currently installed within your Zoho CRM account are listed. Go to the "All Extensions" tab to view all available extensions.
- Click All Extensions, browse/search for Quote Sync to Deals, locate(see screenshot below), and then click the extension. The details about the extension will be shown in the screenshot below.
- Click the Install button.
- Check the "Agree to the Terms of Service" checkbox and click Install.
- Read the Privacy Declaration and click "Agree and Continue".





© CRM Home Leads	Contacts Accounts	Deals Tasks	Meetings	Calls Repo	orts Analytics	Services	Projects			+	۹	φ (	3 8	ŵ		
Setup	All Extensions	Installed														
Q Search	)															
<ul> <li>General</li> </ul>		Quote Syn	c to Deals													
Security Control		A Quote is crea	ted automatica	lly based on the r	esponse of the che	kbox that is	present in the	×								
Channels		Deals module.														
Customization		Do you want to	install the	extension sha	red by sunilk@	dhruvsoft	.com?									
Automation		Extensi	on Details													
<ul> <li>Process Management</li> </ul>		Name	: Quot	te Sync to Deals												
Experience Center		Versio	n : 6													
Data Administration																
Marketplace		I have	agreed to the	Terms of Servic	e.											
Zoho		I auth data a	orize Quote Sy is required.	rnc to Deals to a	ccess and proces	my										
Google		0.010	oroquirour		_											
Microsoft						Continue										
Developer Hub																
▶ Zia																
iavascript:	Here is your Smart Chat (C	trl+Space)							5		Ask Zia	ē	tک ا	Zśa	÷ ن	9 0

Select one of the Profile of Users for whom you want to install the extension and click Confirm.

The button is shown in the screenshot below.

CRM Home Leads Con	ntacts Accounts Deals	Tasks Meetings	Calls Reports	Analytics Services	s Projects			+	Q Ş		9 ¢		
Setup	All Extensions Instal	led											
Q Search													
▶ General	QI	lote Sync to Deals				~							
Security Control		uote is created automatica als module.	ally based on the respor	nse of the checkbox that i	is present in the	^							
Channels													
Customization													
Automation		Choose Users/ Pro	ofiles										
<ul> <li>Process Management</li> </ul>		<ul> <li>Install for admin</li> </ul>	sonly										
Experience Center		Install for all use	rs										
Data Administration		<ul> <li>Choose profiles</li> </ul>											
<ul> <li>Marketplace</li> </ul>													
All		< Back		Confirm									
Zoho													
Google													
Microsoft													
Developer Hub													
▶ Zia													
javascript;	lere is your Smart Chat (Ctrl+Space)						<b>Ģ</b> .	📢 As	k Zia 🛛 🖂	; ៦	Zźa	0 1	) @

Then the extension will be installed in your Zoho CRM.





CRM AllTabs - Home	Leads Contacts	Quote Sync to Deals A Quote is created automatically based on the response of the checkbox that is present in the Deals module.	×	Ð	-) Q .	¢ 🖬	9 ¢		
Q Search		n Installation Status			Uni	install	Get Su	oport	
▶ General	10% Co	plete 🔞							
Security Control	You will	eceive a notification upon completion.							
<ul> <li>Channels</li> </ul>			Okay						
Customization									
Automation	Installed	iate 10 Jul 2024							
Process Management	Short descri	A Quote is created automatically based on the response of the checkbox module.	that is present in t	the Deals					
Experience Center	c c	atus 🕀 Installation in progress View details							
Data Administration	Pormi	ion Change Bermission							
<ul> <li>Marketplace</li> </ul>	reini								
All									
Zoho	Installed Components								
Google	Name	Component	Status						
Microsoft	Modules 🖃								
Developer Hub	→ Deals 🛨	Module							
▶ Zia	→ Deal Products +	Module							
									-
Chats Channels Contacts	Here is your Smart Chat (Ctrl+Space)			₽ ₽	Ask Zia	6 5	Zģa	Ö	Ð 🗊

#### 1.2. Uninstall the Quote Sync to Deals Extension for Zoho CRM

Uninstalling this extension from the Zoho CRM will delete all its associated data. To uninstall Quote Sync to Deals Extension, please follow the below steps:

- Go to Setup > Marketplace > All > Installed tab. All the installed Extensions will be listed.
- Srowse for **Quote Sync to Deals** Extension and click on the **Uninstall** link.
- Click Okay to confirm in the configuration pop-up that follows. The extension will be uninstalled.

## 2. Synchronization

#### 2.1. Deals Module

In the Deals module, the following fields are created after successfully installing the "Quote Sync to Deal" extension. Below are the details of the custom fields created by the extension within the Deals module.

Field Name	Field Type	Mandatory Field
Number of Deal Product Lines	Number	No
The sum of Deal Product Lines Quantity	Number	No





Quote	Lookup	No
Total Discount %	Percent	No
Total Discount Amount	Currency	No
Total Tax %	Percent	No
Total Tax Amount	Currency	No
Amount Before Tax	Currency	No

## 2.2. Creating a Deal

• Open the Deals module in Zoho CRM and click "Create Deal".

CRM All Tabs - Home Lead	ls Contact	s Accounts Deals	Tasks	Meetings Calls	Reports	Services	Projects •••		+ < ÷ t	: = ¢ 🕕	
All Deals 💌									E - Create De	al 🗸 Actions	•
Total Records 23									30 Records Per Pa	age 💌 • 1-23 <	>
Filter Deals by		Deal Name 🛛 🖌	=	Amount 😑	Stage	≡	Closing Date	Ξ	Account Name	Contact Name	::
Q Search	🗆	sample deals today		\$125,758.00	Qualification		Jul 18, 2024		Test Account-Thanmayee		
System Defined Filters     Touched Records		Sample Deal for Sample Account-001		\$2,064,762.00	Needs Analysis		Jul 31, 2024		Sample Account		
Untouched Records		Test by Shivani		\$100,000.00	Qualification		Jul 11, 2024		DS		- 1
Record Action     Related Records Action		Sample Deal for Testing with Large data		\$150,000.00	Qualification		Oct 31, 2024		Test Account-Thanmayee		
<ul> <li>Locked</li> <li>Latest Email Status</li> </ul>		Deal For Test Account DS- 001		\$ 2,452,091.48	Qualification		Jul 26, 2024		Test Account DS		

- Fields which are highlighted below are mandatory fields to create a Deal.
- Enter all the mandatory fields and click the **"Save"** button.

CRM All Tabs - Hom	ne Leads Contacts Accou	Ints Deals Tasks	Meetings Calls	Reports Services Projects		+ q 🧳 🖬 📾 🕸 🕕 🏢
Create Deal Edit Page Layo	ut					Cancel Save and New Save
Deal Information						
Deal Owner	Sai Shivani	~ <u>P</u> q		Amount	\$	٢
Deal Name	Deal for Shivani			Closing Date	Aug 14, 2024	
Account Name	Dhruvsoft			Stage	Qualification	•
Туре	-None-	•		Probability (%)	10	ti ti
Next Step				Expected Revenue	\$	Client Sc
Lead Source	-None-	•		Campaign Source		4
Contact Name		A		Number of Deal Product Lines		
Total Tax %				Sum of Deal Product Lines		
Total Discount %				Total Tax Amount	\$	(î)
Total Discount Amount	\$	٢		Amount Before Tax	\$	0
Charles Charmels Contacts	Here is your Smart Chat (Ctrl+Space)				5	다 Ask Zia ビ 건 Zá (이 관 )





• **Please Note:** The Quote's Grant Total will be used to update the amount field.

CRM All Tabs - Home Lead	Contacts Accounts Deals Tasks Meetings Calls Reports Services Projects •••	+ < + 🖬 📾 🐵 🛄
🟹 All Deals 💌 🖍 🖑		E
Total Records 24		30 Records Per Page 💌 🔹 1 - 24 < >
Filter Deals by	□ Deal Name All +	
Q Search	Deal for Shivani Qualification Jul 31, 2024	Dhruvsoft
<ul> <li>System Defined Filters</li> </ul>	sample deals today \$125,758.00 Qualification Jul 18, 2024	Test Account-Thanmayee
Touched Records     Untouched Records	Sample Deal for Sample \$2,064,762.00 Needs Analysis Jul 31, 2024 Account-001	Sample Account
Record Action	Test by Shivani \$100,000.00 Qualification Jul 11, 2024	DS
Related Records Action     Locked	Sample Deal for Testing \$150,000.00 Qualification Oct 31, 2024 with Large data	Test Account-Thanmayee
Latest Email Status     Activities	Deal For Test Account DS- 001 \$2,452,091.48 Qualification Jul 26,2024	Test Account DS

## 2.3. Creating a Quote

• Open the Quotes module in Zoho CRM and click "CreateQuote".

ⓒ CRM All Tabs → Home Lead	s Contacts Accounts Deals	Tasks Meetings Calls Quo	tes Services Projects ···	+ < + 🖬 📾 🔹 🕕 🛄
Quotes overview Show		L		
T All Quotes 👻			Try CPQ	K 🗄 👻 Create Quote Actions 👻
Total Records 22				10 Records Per Page 💌 🔹 1 - 10 <
Filter Quotes by	Subject All -	Sync Quote = Quote 1	Numbering $\equiv$ Quote Stage $\equiv$	Grand Total 🚊 Deal Name 📑
Q Search	<ul> <li>quote for testing today</li> </ul>		Draft	\$125,758.00 sample deals today
<ul> <li>System Defined Filters</li> </ul>	<ul> <li>quote for testing today</li> </ul>		Draft	\$125,100.00 sample deals today
Touched Records     Untouched Records	<ul> <li>quote for testing</li> </ul>		Draft	\$150,000.00 Sample Deal for Testing with Large data
Record Action     Related Records Action	<ul> <li>quote for testing</li> </ul>		Draft	\$150,000.00 Sample Deal for Testing with Large data
Locked	Sample Quote -002		Draft	\$ 5,761,650.027 Sample Deal for Sample

- The fields which are highlighted below are mandatory fields to create a quote.
- More products can be added by clicking "Add row" in the Quoted Items section.
- Discounts and Taxes can be given to the individual items.
- Enter all the mandatory fields and click the "Save" button.





CRM All Tabs - Hom	ne Leads Contacts	Accounts Deals	Tasks	Meetings	Calls Quotes	Services	Projects		<del>+</del> વ	🤗 🗔	8 0		
Create Quote Edit Page La	iyout					-			Cancel	Save an	d New	Save	
Quote Information													
Quote Owner	Sai Shivani		~ Pa			De	al Name	Deal for Shivani			đ		
Subject	Quote for Shivani					Va	alid Until	MMM D, YYYY					
Quote Stage	Draft		•			Conta	ct Name	Shivani Pakala			A		
Team						Accour	nt Name	Dhruvsoft					ript •
Carrier	FedEX		•			Syn	c Quote						Client So
Quote Numbering													•
Address Information										Сору	Address		
Billing Street						Shippin	ig Street						
Billing City						Shipp	oing City						
Contra Contracto Contracto	Here is your Smart Chat (Ctrl+S	Dace)						ç.	📢 Ask Zia	6 12	ZÁS	୯ ୫	) (7)

c	reate Quo	te Edit Page Layout							Cancel Save and New Save
	S.NO	Product Name	Quantity	List Price (\$)	Amount (\$)	Discount (\$)	Tax (\$)	Total (\$)	
1	: 1	Tab (TB23)	2	15000	30000	3000	1350	28350	
×		Samsung Tablet							
	2	Laptop HP (LPHP1)	1	85000	85000	0	15300	100300	
		HP Pavilion 39.6 cm Laptop 15- eg3027TU, 13th Generation Intel Core i5 processor, 16GB DDR4 RAM, 512 GB SSD							
	3	Mobile (MB112)	3	17000	51000	1550	2472.5	51922.5	
		Realme 5 Pro V2.0, Android Version - 11, Processor - Qualcomm SDM712 Octa-core, RAM 8.00 GB, Device Storage - 128 GB.							
	+ Add row						Sub Total (\$)	180572.5	
							Discount (\$)	0	
							Tax (\$)	0	
							Adjustment (\$)		
							Grand Total (\$)	180572.5	
	· 성상	Here is your Smart Chat (Ctrl+Space)						<b>G A</b>	AskZia 🖾 🎦 🎪 🔞 🕫

• Upon Saving the Quote, A record is created in the Quotes module.

CRM All Tabs  Home Li	eads	Contacts	Accounts	Deals	Tasks	Meetings	Calls	Quotes	Services	Projects		+	Q & 🖬	a 🕸 🕕	
Quotes overview Show															
All Quotes 👻											Try CPQ	E	• Create	Quote Actions	-
Total Records 23												10	Records Per Pag	e.♥ • 1-10 <	>
Filter Quotes by		🗌 Sut	oject All <del>-</del>	=	Sync Qu	ote	≡	Quote Numbe	ring	■ Quote Stag	e ≡		Grand Total 🔳	Deal Name	:-
Q Search		🗌 Qu	ote for Shivani				4	103 - Q1		Draft			\$ 477,045.00	Deal for Shivani	
<ul> <li>System Defined Filters</li> </ul>		🗌 qua	ote for testing to	oday						Draft			\$125,758.00	sample deals today	
Touched Records		🗌 qua	ote for testing to	oday						Draft			\$125,100.00	sample deals today	
Contouched Records  Record Action		🗌 qua	ote for testing							Draft			\$150,000.00	Sample Deal for Tes with Large data	sting
Related Records Action     Locked		🗌 qua	ote for testing							Draft			\$150,000.00	Sample Deal for Tes with Large data	sting





### 2.4. Quote Sync to Deal

CRM All Tabs - Home	Leads Contacts Ac	ccounts Deals Tasks	Meetings Calls	Quotes Services Proje	cts •••	🕂    +        
$\leftarrow$ Quote for Shivani						Convert - Edit ···· < >
Related List	Overview Timelin	e				Last Update : 03:06 PM
Notes						
Sales Orders	Hide Details					
Attachments	Quote Information					
Open Activities	Quote Owner	Sai Shivani		Quote Num	er 706241000000791023	
Closed Activities	Subject	Quote for Shivani		Deal Na	ne Deal for Shivani	
Emails		Quote for onivani		Veletin		
Deals	Quote Stage	Draft		Valid U	-	
Deal Products	Team	_		Contact Na	ne Shivani Pakala	
	Carrier	FedEX		Account Na	ne DS	
Links	Created By	Sai Shivani		Modified	By Sai Shivani	
Add Link		Thu, 11 Jul 2024 03:06 PM			Thu, 11 Jul 2024 03:06 PM	
	Quote Numbering	403 - Q1		Sync Qu	te	×
	Address Information					
						Locate Map
	Billing Street	_		Shipping Str	et –	
	Billing City	-		Shipping C	ity —	

- When we select the **"Quote Sync"** check box to **"true"** in the Quotes module, then only that quote is synced to its respective deal, and the fields of that deal get updated.
- Additionally, deal product records will be created based on the line items specified in the Quotes module.

CRM All Tabs - Home	Leads Contacts Acc	counts Deals Tasks	Meetings Calls	Reports	Services Projects	🛨	Q & C C & C <pc &="" c<="" p=""> <pc &<="" th=""></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc></pc>
← Deal for Shivani - \$ 477,045	5.00						Send Email Edit •••
Related List	Overview Timeline						Last Update : 03:10 PM
Notes	Deal Owner	Sai Shivani			Amou	int \$ 477,045.00	
Stage History 1	Deal Name	Deal for Shivani			Closing Da	ate Jul 31, 2024	
Competitors	Account Name	Dhruvsoft			Sta	ge Qualification	
Cadences	Туре	-			Probability (	,%) 10	
Open Activities	Next Step	_			Expected Reven	ue \$47,704.50	
Closed Activities	Lead Source	_			Campaign Sour	ce –	
Products	Contact Name	-			Created	By Sai Shivani Thu, 11 Jul 2024 11:23 AM	
Sales Orders	Modified By	Sai Shivani Thu, 11 Jul 2024 03:10 PM		ſ	Number of Deal Produ	uct 6	
Contact Roles	Total Tax %	21.37			Current David Development Line	es 10	
Cases	Total Discount %	30.9			Sum or Deal Product Lin Quant	ity	
Emails	Total Discount Amount	\$1,032.00			Total Tax Amou	int \$40,477.00	
Invoices	Deal Number	403			Amount Before T	ax \$436,568.00	
Deal Products 6 Add Related List	Quote	Quote for Shivani		l	Line To	tal \$477,045.00	-





## 2.5. Deal Products Module

In the Deal Products module (custom module), the following fields are created after successfully installing the "Quote Sync to Deal" Extension. Below are the details of the custom fields created by the extension within the Deal Products module.

Field Name	Field Type	Mandatory Field
Deal	Lookup	No
Quote	Lookup	No
Product	Lookup	No
Product Description	TextArea	No
Rate	Currency	No
Quantity	Number	No
Amount	Currency	No
Discount %	Percent	No
Discount Amount	Currency	No
Tax %	Percent	No
Tax Amount	Currency	No
Total Amount	Currency	No

• After syncing the quote with the deal, the Deal Products (related list of Deals) are shown in the screenshot below.

CRM All Tabs - Home	Leads	Contacts	Accounts	Deals	Tasks	Meetings	Calls	Reports	Services	Projects		+		<b>i</b> 5	* ©	
← Deal for Shivani - \$ 477,0	45.00												Sei	nd Email	Edit	
Related List	Overv	iew Tin	neline											L	ast Update : 03	:10 PM
Notes																-
Attachments																
Stage History 1	Invoic	es														
Competitors	No rec	ords found	Assian	lew												
Cadences		L. L.														
Open Activities																
Closed Activities	Deal P	roducts											Assign	New	Edit	G,
Products		Deal Produ	ct Name		Quantity	r Rate		Amount	D	iscount %	Discount Amount	Tax %	Tax A	nount	Total Amou	nt
Quotes 1		Quote for S	ihivani - Oven		1	\$ 40,00	0.00	\$40,000.	00 0		\$ 0.00	0	\$ 0.00	)	\$40,000.0	0
Sales Orders		Quote for S	ihivani - iPhone		2	\$ 150,00	00.00	\$ 300,000	0.00	.01	\$ 20.00	12	\$ 35,9	97.60	\$ 335,977.6	0
Contact Roles																
Cases		Quote for S	hivani - Perfume	es	1	\$ 1,500.	.00	\$1,500.00	) 1:	3.33	\$200.00	0	\$ 0.00	)	\$1,300.00	
Emails		Quote for S	ihivani - Radio		2	\$ 45,00	0.00	\$ 90,000.	00 0	.56	\$ 500.00	4.97	\$ 4,47	5.00	\$ 93,975.00	
Invoices Deal Products 6		Quote for S	ihivani - Nokia M	lobile	3	\$2,000	.00	\$6,000.0	0 5		\$300.00	0	\$ 0.00	)	\$ 5,700.00	$\hat{}$
Add Related List		Quote for S	ihivani - Crayons	5	1	\$100.0	0	\$100.00	15	2	\$12.00	4.4	\$ 4.40	)	\$92.40	
Chais Charnels Contacts	Here is your S	mart Chat (Ctrl+	Space)								Ċ		lsk Zia 💮	ษ	Zia 😳	-D @





• On Syncing the Quote to Deal, a new record is created in the Deal Products module for each Product in the Quoted Items of the Syncing Quote.

ⓒ CRM All Tabs ▼ Home Leads	Contacts Accounts Deals Tasks Mee	tings Deal Products Services Projects	• <del>+</del> < 4 🖬 📾 8	\$ 🕕 🖩
All Deal Products ▼			Create Deal Product 🔹	Actions 💌
Total Records 6			10 Records Per Page 💌	1-6 < >
Filter Deal Products by	Deal Product Name All -	Deal Product Owner	■ Modified Time	≡ ∓
Q Search	Quote for Shivani - Oven	Sai Shivani	Jul 11, 2024 03:10 PM	
✓ System Defined Filters	Quote for Shivani - iPhone	Sai Shivani	Jul 11, 2024 03:10 PM	
Touched Records	Quote for Shivani - Perfumes	Sai Shivani	Jul 11, 2024 03:10 PM	
Untouched Records	Quote for Shivani - Radio	Sai Shivani	Jul 11, 2024 03:10 PM	
Related Records Action	Quote for Shivani - Nokia Mobile	Sai Shivani	Jul 11, 2024 03:10 PM	
Latest Email Status	Quote for Shivani - Crayons	Sai Shivani	Jul 11, 2024 03:10 PM	
Activities				
Notes				
Cadences				

• When we Sync multiple Quotes to the Deal, only the latest Synced Quote will be the syncing quote.

CRM All Tabs - Home	Leads Contacts Accounts Deals Tasks	Meetings Deal Pro	ducts Services	Projects •••	<mark>+</mark> < 수 🖆	a 🕸 🕕 🛄
← Deal for Shivani - \$ 477,045.	.00				Send Email	Edit ···· < >
Related List	Overview Timeline					Last Update : 03:38 PM
Notes	No records found Add Products					<b>^</b>
Attachments	Additional					
Stage History 1						
Competitors	Quotes				Assian	ew Edit 🖽
Cadences						
Open Activities	Subject	Sync Quote	Quote Stage	Quote Number	Valid Until Carrier	Sub Total
Closed Activities	Quote for Shivani 2	~	Draft	706241000000791109	FedEX	\$ 477,045.00
Products	Quote for Shivani 1		Draft	706241000000791079	FedEX	\$ 2,000.00
Quotes 3	Quote for Shivani		Draft	706241000000791023	FedEX	\$ 477,045.00
Sales Orders						
Contact Roles						





## 2.6. Stop the sync of the Synced Quote

When the Sync quote is unchecked, the custom field values in that specific deal are cleared.

ⓒ CRM All Tabs ▼ Home	Leads Contacts Ac	counts Deals Tasks	Meetings Calls	Quotes S	ervices Projects		+ 4 🖓 🖬 🖶 🕸 🌔	
$\leftarrow$ Quote for Shivani 2							Convert = Edit ···· <	>
Related List	Overview Timeline	9					Last Update : 07:15	5 PM
Notes	Accounts				Deals			1
Sales Orders	DS				Deal for Shivani 🚺	77,045.00		
Attachments					Qualification Jul 31,	2024		
Open Activities								-1
Closed Activities	Hide Details							
Emails	Quote Information							
Deals 1	Quote Owner	Sai Shivani			Quote Number	706241000000791109		
Deal Products 6	Subject	Quote for Shivani 2			Deal Name	Deal for Shivani		
Recurring Invoices	Quote Stage	Draft			Valid Until	_		
	T				Contract Name			
Links	Team				Contact Name			
Add Link	Carrier	FedEX			Account Name	DS		
	Created By	Sai Shivani Thu, 11 Jul 2024 03:38 PM			Modified By	Sai Shivani Tue, 16 Jul 2024 07:15 PM		
	Quote Numbering	403 - Q3			Sync Quote	0		

ⓒ CRM All Tabs ▼ Home	Leads Contacts Acc	ounts Deals Tasks	Meetings Calls	Reports S	Services Projects		+	२ 🖓 ।	<b>.</b> .	\$ 🕕	
$\leftarrow$ Deal for Shivani								Send	Email	Edit	
Related List	Overview Timeline								Last U	Ipdate : 07:16	PM
Notes	Deal Owner	Sai Shiyani			Amo	unt -					
Attachments	Dearowner				And						
Stage History 1	Deal Name	Deal for Shivani			Closing L	ate Jul 31,	2024				
Competitors	Account Name	Dhruvsoft			St	age Qualif	ication				
Cadences	Туре				Probability	(%) 10					
Open Activities	Next Step	-			Expected Reve	nue \$ 0.00	)				
Closed Activities	Lead Source				Campaign Sou	irce –					
Products	Contact Name	_			Created	d By Sai Sh	ivani				
Quotes 3	Modified By	Sai Shivani		_		Thu, 11	Jul 2024 11:23 AM				
Sales Orders		Tue, 16 Jul 2024 07:16 PM			Number of Deal Prod	luct –					
Contact Roles	Total Tax %	-				nes					
Cases	Total Discount %	_			Sum of Deal Product Li Quar	nes – itity					
Emails	Total Discount Amount	_			Total Tax Amo	unt –					
Invoices	Deal Number	402			Amount Reform	Tax					
Deal Products	bearreamber	400			, mount before						
Recurring Invoices	Quote	-		L	Line I	otai —					
<b>A N N N</b>	Description Information						<b>C</b> -1		1		_
Charles Charlosts Contracts He	ere is your Smart Chat (Ctrl+Space)						54   F\$   J	Ask Zia 🛛 🗠	10 Z/A	01	Ð





CRM All Tabs • Home	Leads Contacts Accounts Deals Tasks	Meetings Calls	Reports Servic	ces Projects •••	<mark>+</mark> વ	🧈 🖬 💩 🕕 🏢
$\leftarrow$ Deal for Shivani						Send Email Edit •••
Related List	Overview Timeline					Last Update : 07:16 PM
Notes	No records found Add Products					<b>^</b>
Attachments	No records round					
Stage History 1						
Competitors	Quotes				[	Assign New Edit 🛱
Cadences	Subject	Sync Quote	Quote Stage	Quote Number	Valid Until	Carrier Sub Total
Open Activities Closed Activities	Quote for Shivani 2		Draft	706241000000791109		FedEX \$ 477,045.00
Products	Quote for Shivani 1		Draft	706241000000791079		FedEX \$2,000.00
Quotes 3	Quote for Shivani		Draft	706241000000791023		FedEX \$477,045.00
Sales Oruers						

### 2.7. On deleting the Synced Quote

The fields in the corresponding deal-associated quote will vanish whenever a synced quote is deleted. In the Deal Products module, every record linked to that deleted quote will also be deleted.

CRM AllTabs - Home	Leads Contacts Acc	ounts Deals Tasks Meetings	Calls Reports	Services Projects ···	+ Q	. 4 🖬 📾 🌒 🛄
← Deal for Shivani						Send Email Edit ····
I Related List	Overview Timeline					Last Update : 03:43 PM
Notes					1	*
Attachments	Deal Owner	Sai Shivani		Amount	-	
Stage History 1	Deal Name	Deal for Shivani		Closing Date	Jul 31, 2024	
Competitors	Account Name	Dhruvsoft		Stage	Qualification	
Cadences	Туре			Probability (%)	10	
Open Activities	Next Step			Expected Revenue	\$ 0.00	
Closed Activities	Lead Source			Campaign Source		
Products	Contact Name			Created By	Sai Shivani	
Quotes 2	Modified By	Sai Shiyani			Thu, 11 Jul 2024 11:23 AM	
Sales Orders		Thu, 11 Jul 2024 03:43 PM		Number of Deal Product	-	
Contact Roles	Total Tax %	-		Lines		
Cases	Total Discount %	_		Sum of Deal Product Lines Quantity	-	
Emails	Total Discount Amount	-		Total Tax Amount	_	
Invoices	Deal Number	403		Amount Before Tax	_	
Deal Products	Quote	-		Line Total	-	

# 3. Support Contacts for Quote Sync to Deals Extension – Dhruvsoft Help Desk

Thank you for installing Quote Sync to Deals Extension. If you have any questions or are facing installation issues, please contact the Dhruvsoft Support Desk for Zoho Extensions via email at <a href="support@dhruvsoft.com">support@dhruvsoft.com</a> or call us at (+91 9704056000).