



Quote Sync to Deal

Zoho CRM Extension



User Manual

Version 1.0

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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.

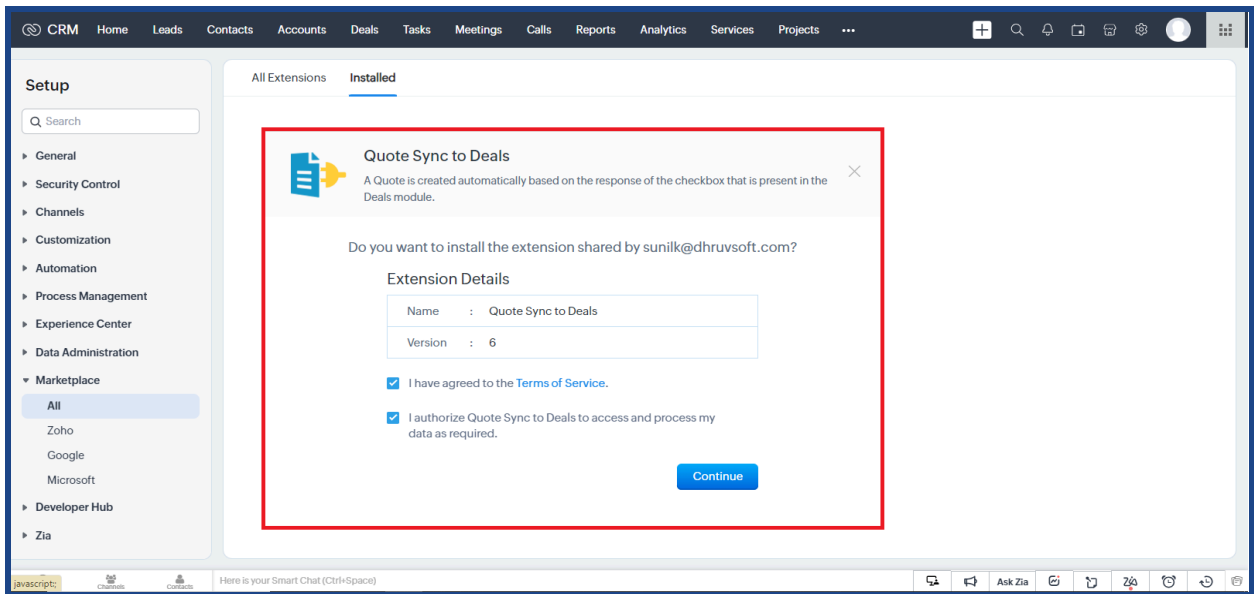
This User Manual document provides step-by-step instructions to install this extension from Zoho Marketplace, and how to configure and use the Quote Sync to Deals extension within your Zoho CRM account.

1.1. Install the Quote Sync to Deals Extension

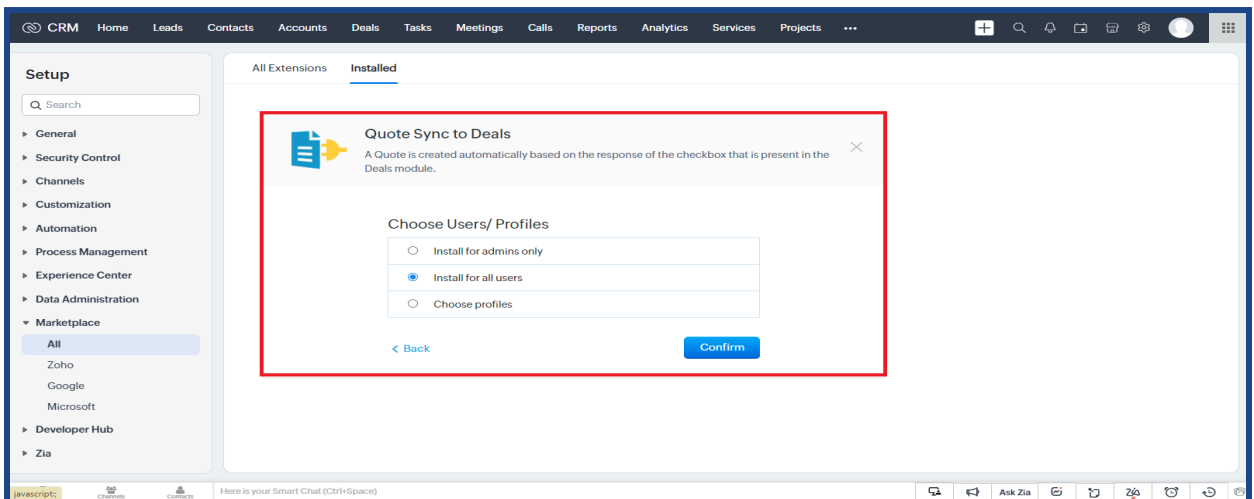
You can either go to Zoho Marketplace and search for “**Quote Sync to Deals**” to locate and install the extension directly from the Marketplace. Alternatively, you can install the “Quote Sync to Deals” extension by logging in to your Zoho CRM account and following the below installation instructions.

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

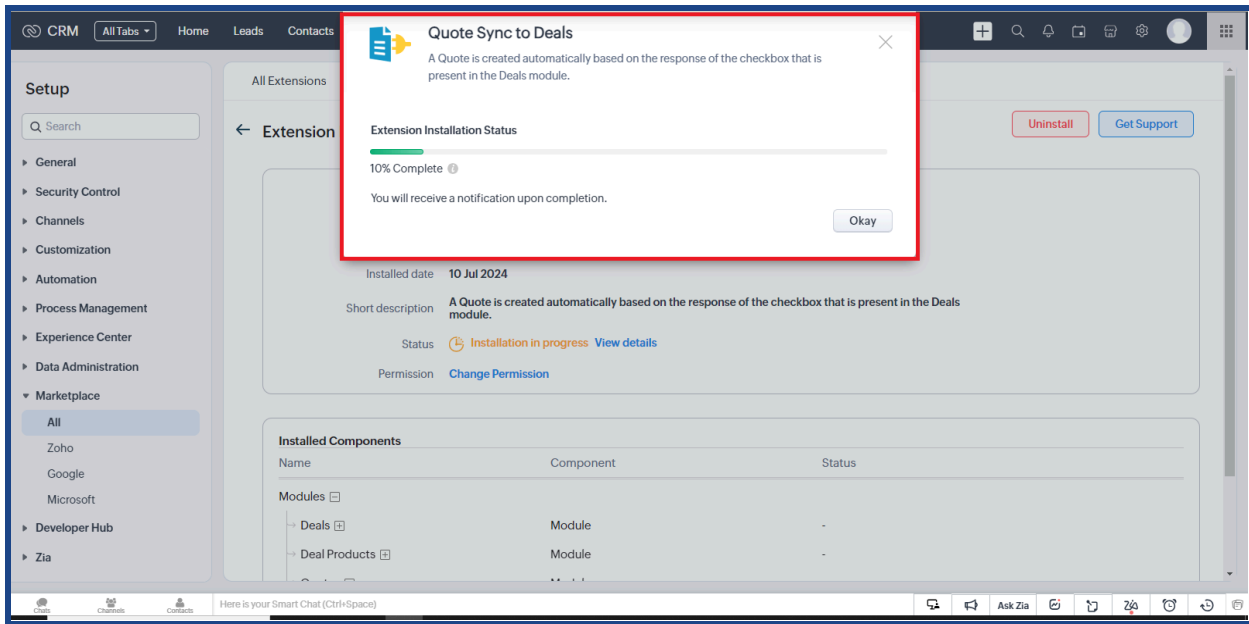
- ❖ Go to the **Setup > Marketplace > All**. By default, all the Zoho extensions currently installed within your Zoho CRM account are listed. Go to the “**All Extensions**” tab to view all available extensions.
- ❖ Click **All Extensions**, browse/search for **Quote Sync to Deals**, locate (see screenshot 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”.



- ❖ 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.



- ❖ Then the extension will be installed in your Zoho CRM.



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.
- ❖ Browse 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

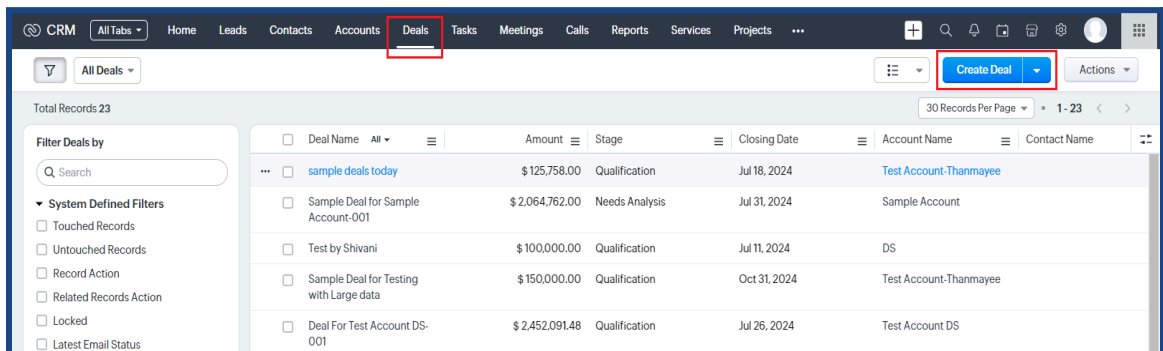
In the Deals module, the following fields are created after successfully installing the “Quote Sync to Deal” extension. Below are the details of the custom fields created by the extension within the Deals module.

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

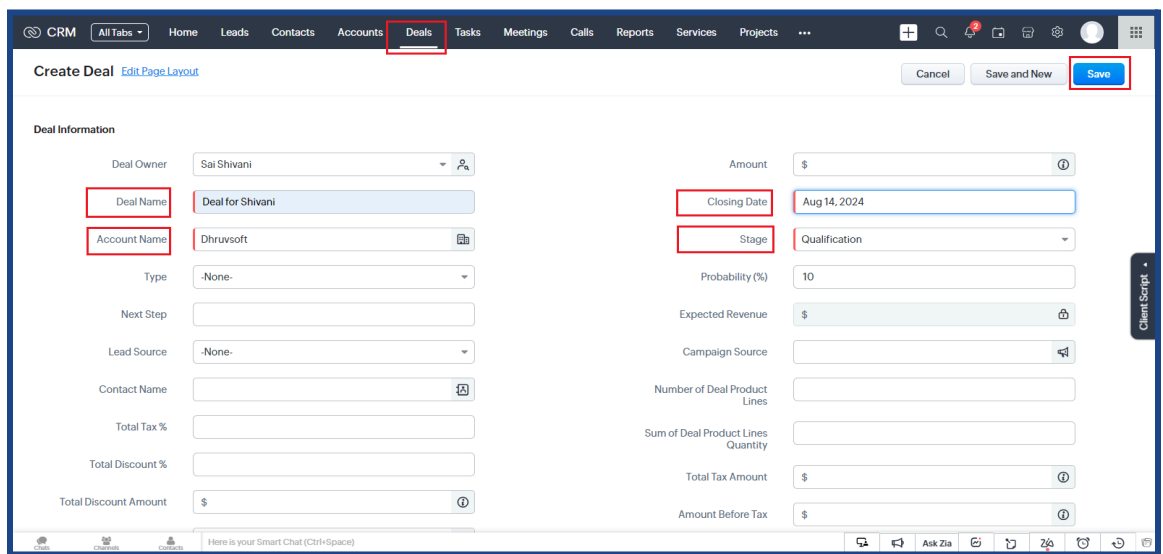
Quote	Lookup	No
Total Discount %	Percent	No
Total Discount Amount	Currency	No
Total Tax %	Percent	No
Total Tax Amount	Currency	No
Amount Before Tax	Currency	No

2.2. Creating a Deal

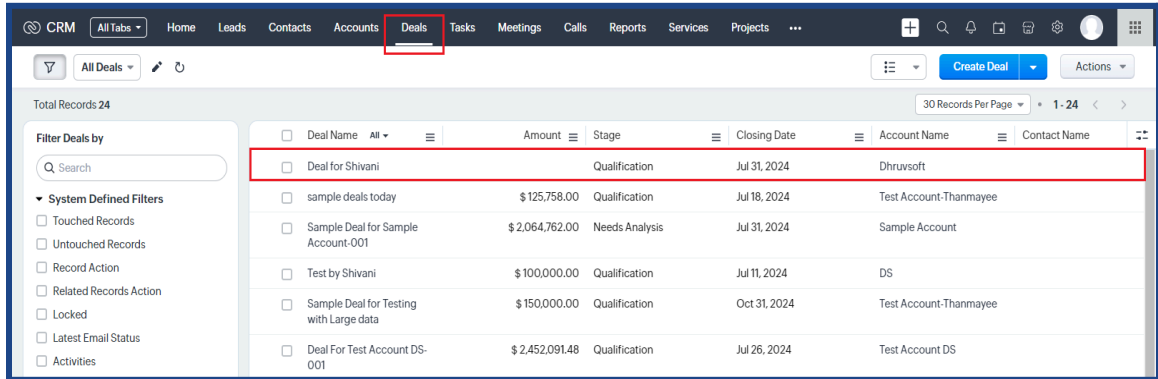
- Open the Deals module in Zoho CRM and click **“Create Deal”**.



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

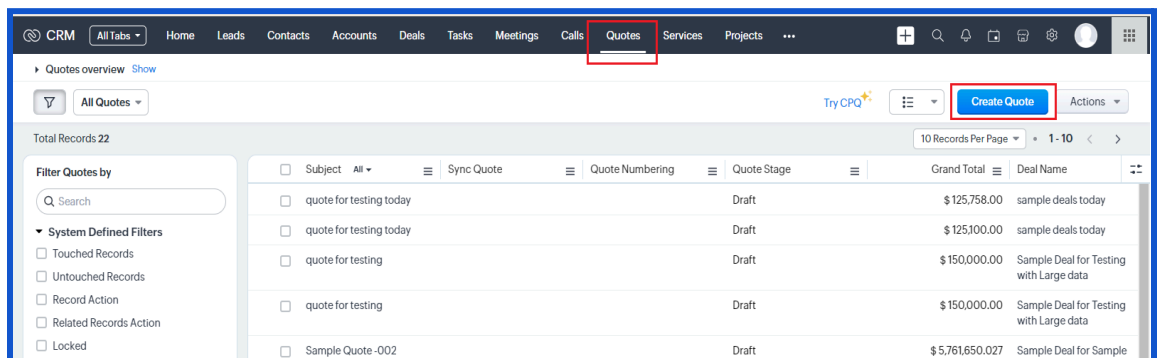


- **Please Note:** The Quote’s Grant Total will be used to update the amount field.



2.3. Creating a Quote

- Open the Quotes module in Zoho CRM and click **“CreateQuote”**.



- 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.



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

Quote Information

Quote Owner: Sai Shivani | Deal Name: Deal for Shivani

Subject: Quote for Shivani | Valid Until: MMM D, YYYY

Quote Stage: Draft | **Contact Name:** Shivani Pakala

Team: | **Account Name:** Dhruvsoft

Carrier: FedEx | Sync Quote:

Address Information Copy Address

Billing Street: | Shipping Street: |

Billing City: | Shipping City: |

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

S.NO	Product Name	Quantity	List Price (\$)	Amount (\$)	Discount (\$)	Tax (\$)	Total (\$)
1	Tab (TB23) Samsung Tablet	2	15000	30000	3000	1350	28350
2	Laptop HP (LPHP1) HP Pavilion 39.6 cm Laptop 15-eg3027TU, 13th Generation Intel Core i5 processor, 16GB DDR4 RAM, 512 GB SSD	1	85000	85000	0	15300	100300
3	Mobile (MB112) Realme 5 Pro V2.0, Android Version - 11, Processor - Qualcomm SDM712 Octa-core, RAM 8.00 GB, Device Storage - 128 GB.	3	17000	51000	1550	2472.5	51922.5

+ Add row

Sub Total (\$) 180572.5
Discount (\$) 0
Tax (\$) 0
Adjustment (\$)
Grand Total (\$) 180572.5

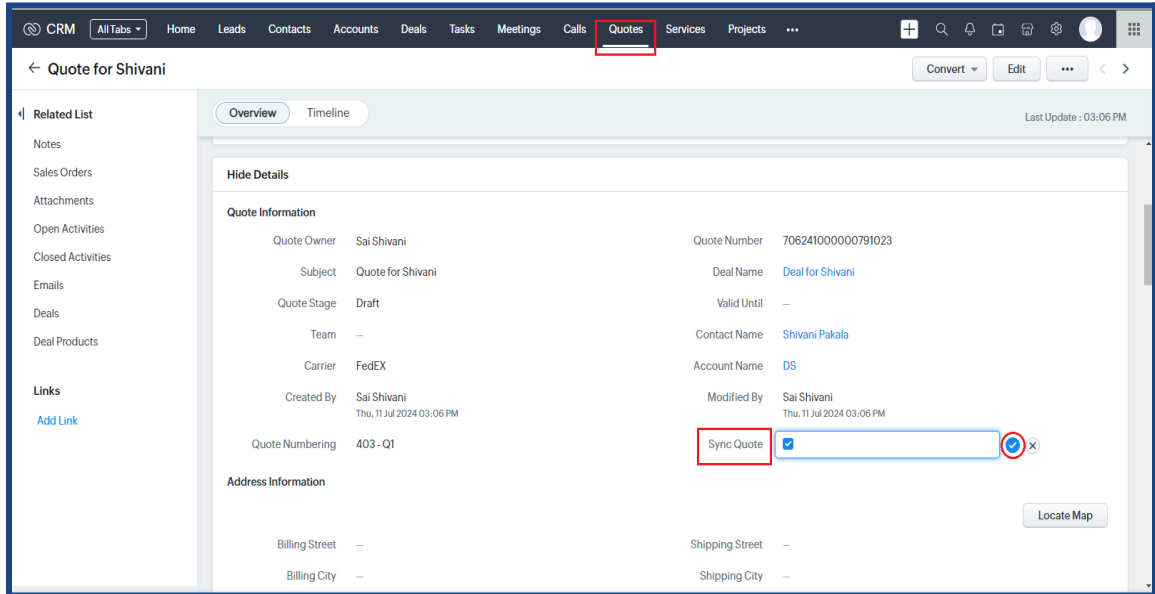
- Upon Saving the Quote, A record is created in the Quotes module.

Quotes overview [Show](#) Try CPQ Create Quote Actions

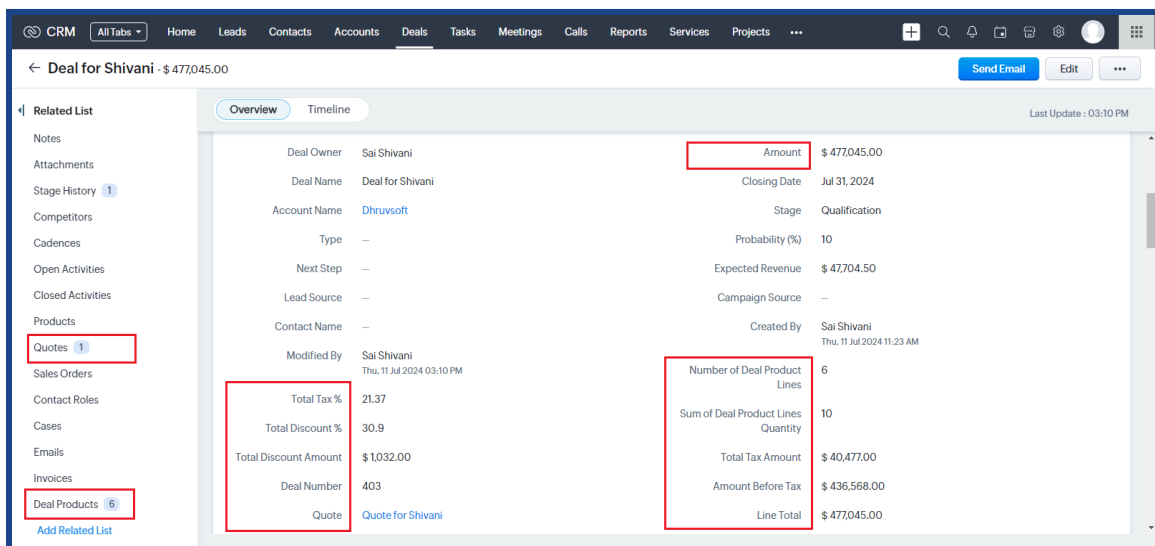
Total Records 23 | 10 Records Per Page | 1 - 10

Subject	Sync Quote	Quote Numbering	Quote Stage	Grand Total	Deal Name
Quote for Shivani		403 - Q1	Draft	\$ 477,045.00	Deal for Shivani
quote for testing today			Draft	\$ 125,758.00	sample deals today
quote for testing today			Draft	\$ 125,100.00	sample deals today
quote for testing			Draft	\$ 150,000.00	Sample Deal for Testing with Large data
quote for testing			Draft	\$ 150,000.00	Sample Deal for Testing with Large data

2.4. Quote Sync to Deal



- 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.

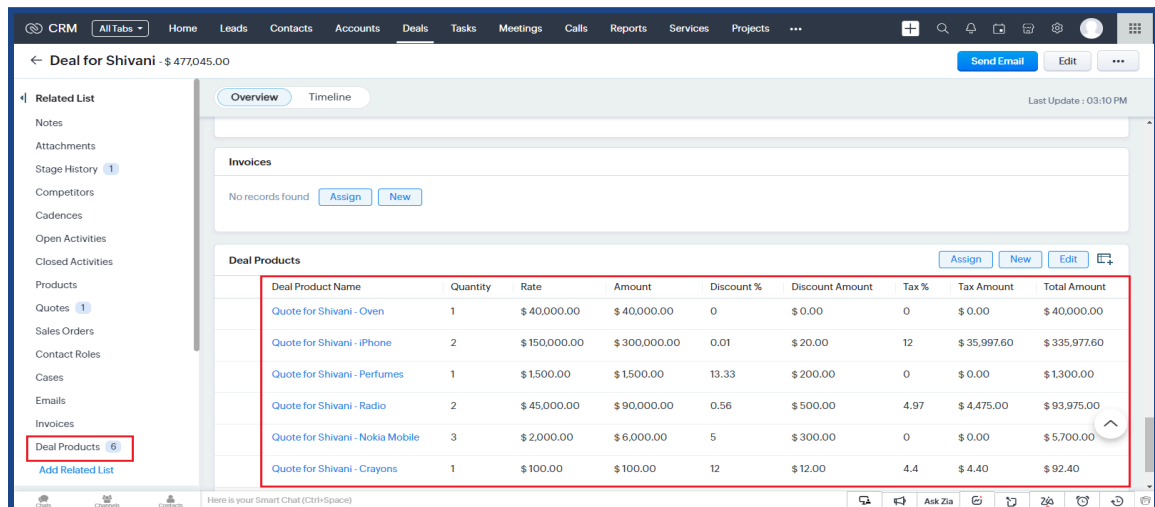


2.5. Deal Products Module

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

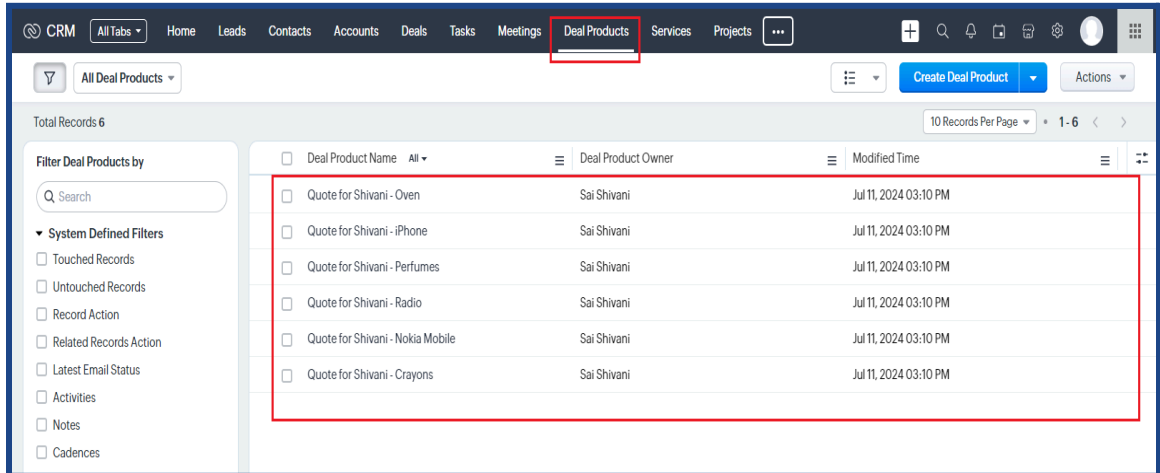
- After syncing the quote with the deal, the Deal Products (related list of Deals) are shown in the screenshot below.



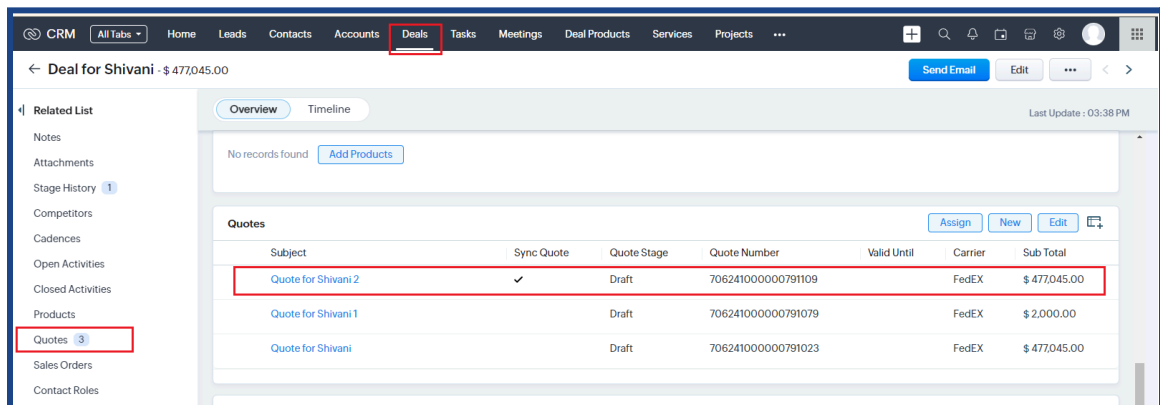
The screenshot shows the Zoho CRM interface for a deal named "Deal for Shivani" with a total value of \$477,045.00. The "Deal Products" section is highlighted with a red box and contains the following data:

Deal Product Name	Quantity	Rate	Amount	Discount %	Discount Amount	Tax %	Tax Amount	Total Amount
Quote for Shivani - Oven	1	\$ 40,000.00	\$ 40,000.00	0	\$ 0.00	0	\$ 0.00	\$ 40,000.00
Quote for Shivani - iPhone	2	\$ 150,000.00	\$ 300,000.00	0.01	\$ 20.00	12	\$ 35,997.60	\$ 335,977.60
Quote for Shivani - Perfumes	1	\$ 1,500.00	\$ 1,500.00	13.33	\$ 200.00	0	\$ 0.00	\$ 1,300.00
Quote for Shivani - Radio	2	\$ 45,000.00	\$ 90,000.00	0.56	\$ 500.00	4.97	\$ 4,475.00	\$ 93,975.00
Quote for Shivani - Nokia Mobile	3	\$ 2,000.00	\$ 6,000.00	5	\$ 300.00	0	\$ 0.00	\$ 5,700.00
Quote for Shivani - Crayons	1	\$ 100.00	\$ 100.00	12	\$ 12.00	4.4	\$ 4.40	\$ 92.40

- 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.

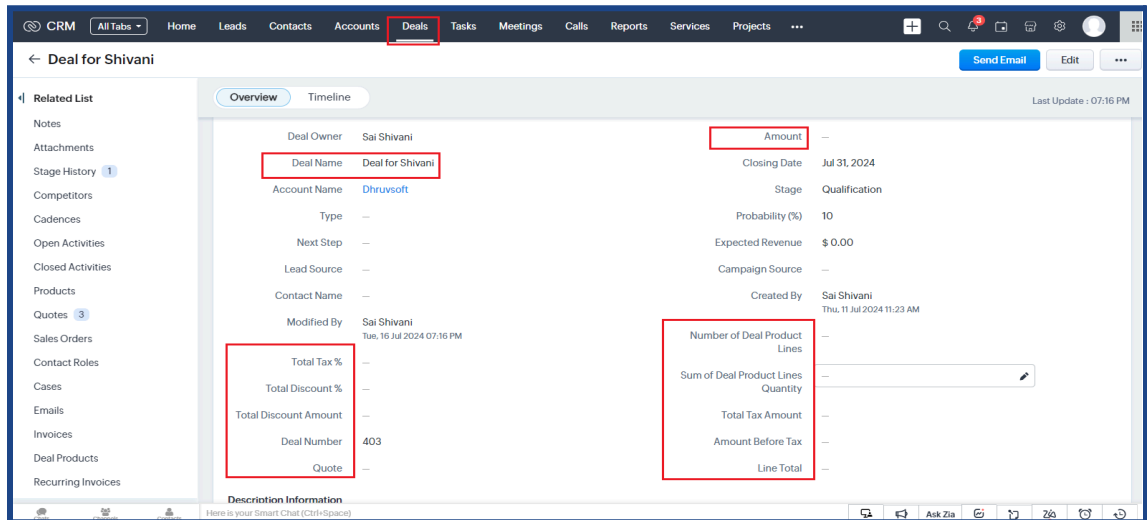
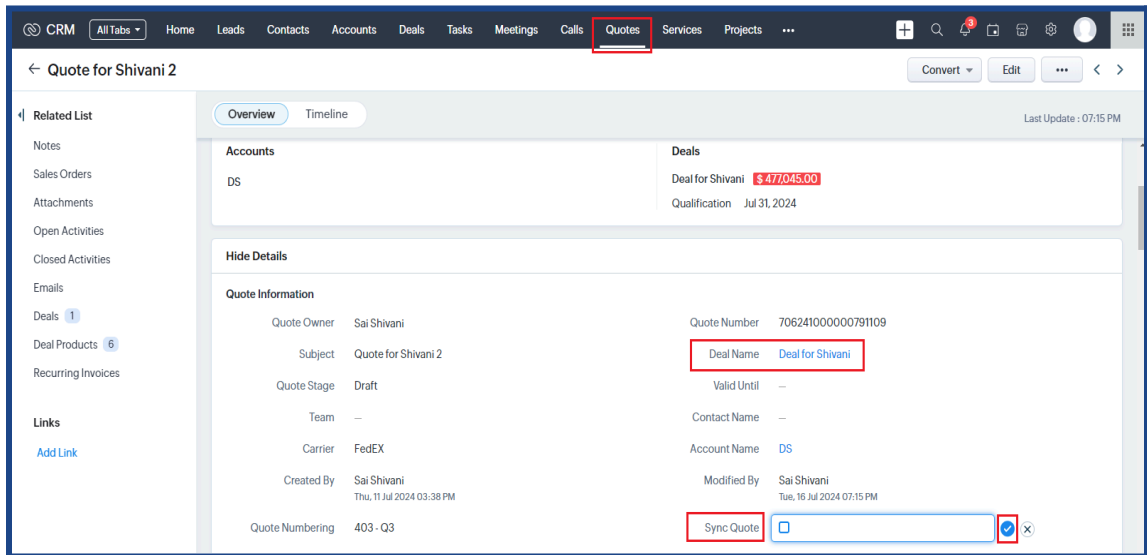


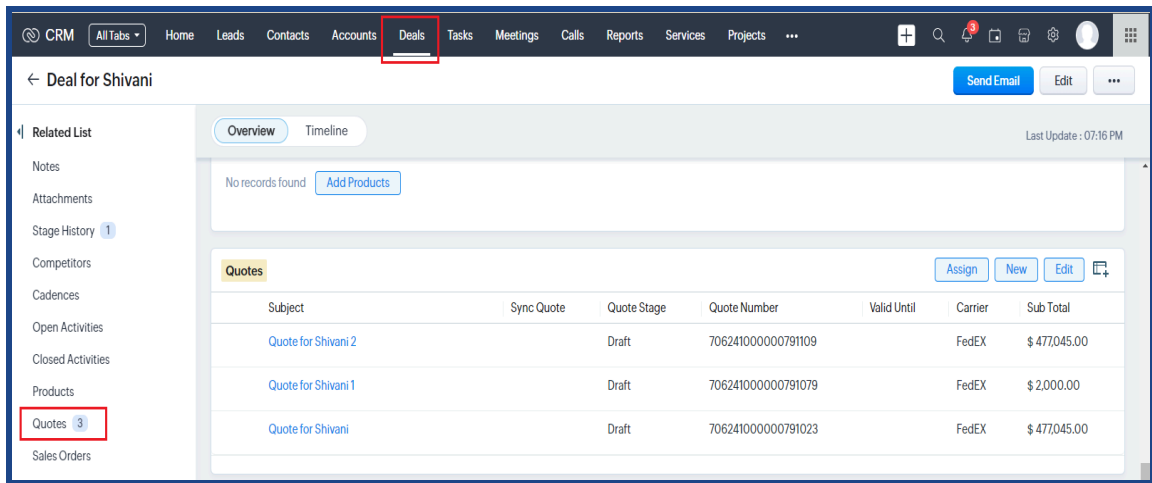
- When we Sync multiple Quotes to the Deal, only the latest Synced Quote will be the syncing quote.



2.6. Stop the sync of the Synced Quote

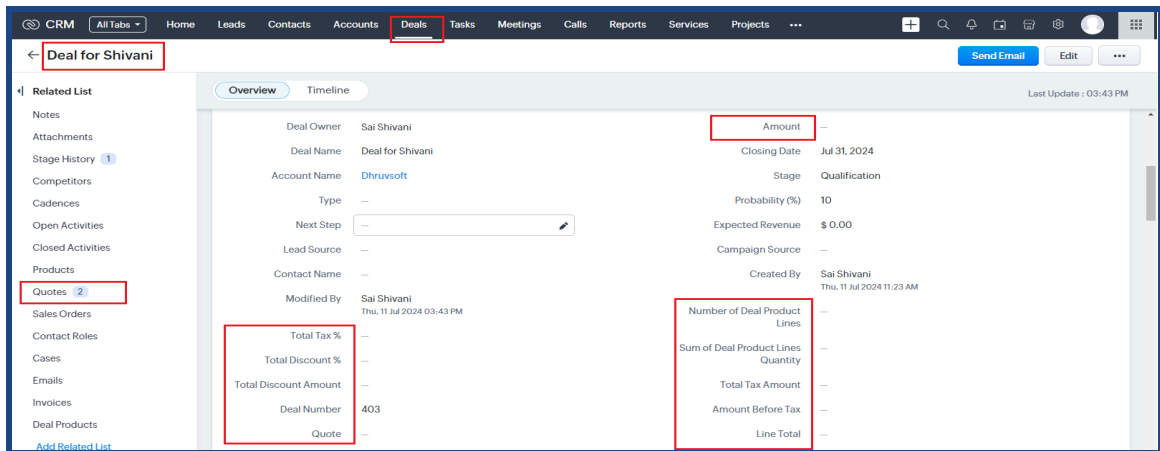
When the Sync quote is unchecked, the custom field values in that specific deal are cleared.





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.



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 support@dhruvsoft.com or call us at (+91 9704056000).