Extension name: **Freeagent Extension for Zoho CRM**

Tagline
Seamless and quick connection with Zoho and Freeagent

Overview

The profitability of your business is bound to how productive your sales team is, and Zoho CRM to Freeagent is a practical extension that speeds up productivity by ensuring a seamless flow of information between your CRM and Freeagent accounting software. This is the right tool for your sales teams to drive home sales as it syncs contacts and quotes to your accounting software, ensuring your team always has up-to-date information on each customer.

Key Features

Automatically create a module to connect with your Xero account easily.
Auto creates a module in the CRM that connects to Freeagent
Updates record successfully pushed to Feeagent in CRM
No coding required; easy set up
No other field creation needed for the CRM

USE
From Zoho to FreeAgent:

Integrates Zoho Contacts, Sales orders and Quotes along with Zoho Invoices to FreeAgent.
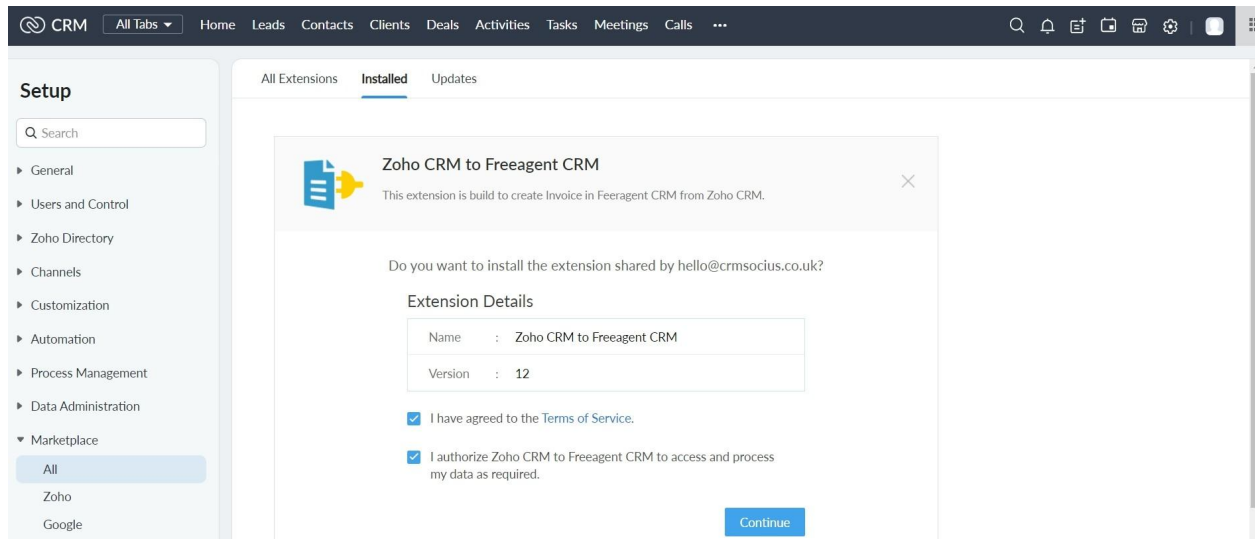
From FreeAgent to Zoho:

Integrates updated Freeagent Invoice status back in Zoho CRM.
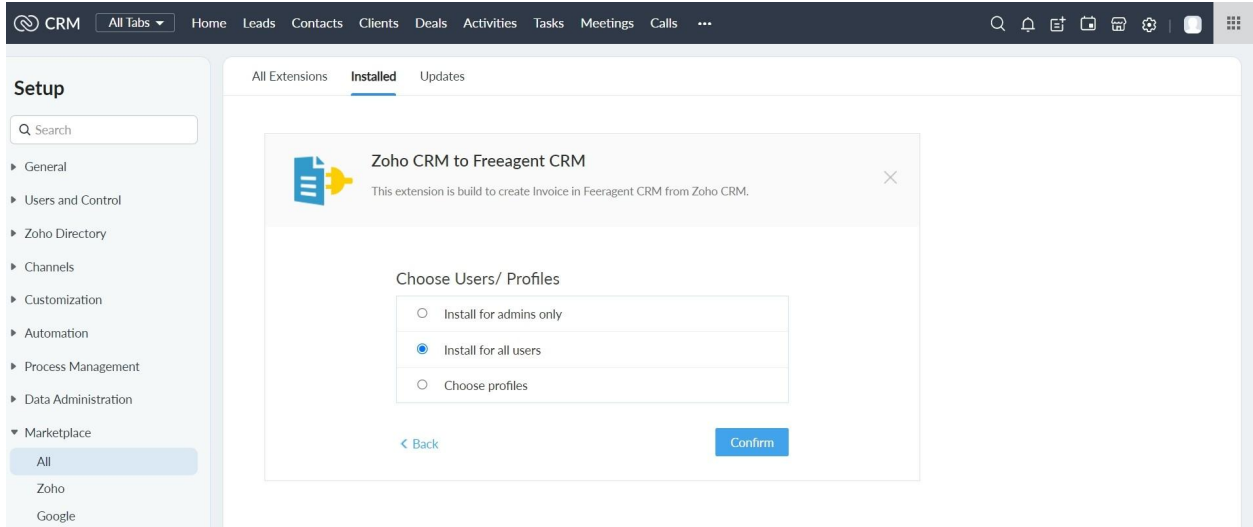
INSTALLATION STEPS

Search for Zoho CRM to Freeagent in Marketplace or click on the link on the website.

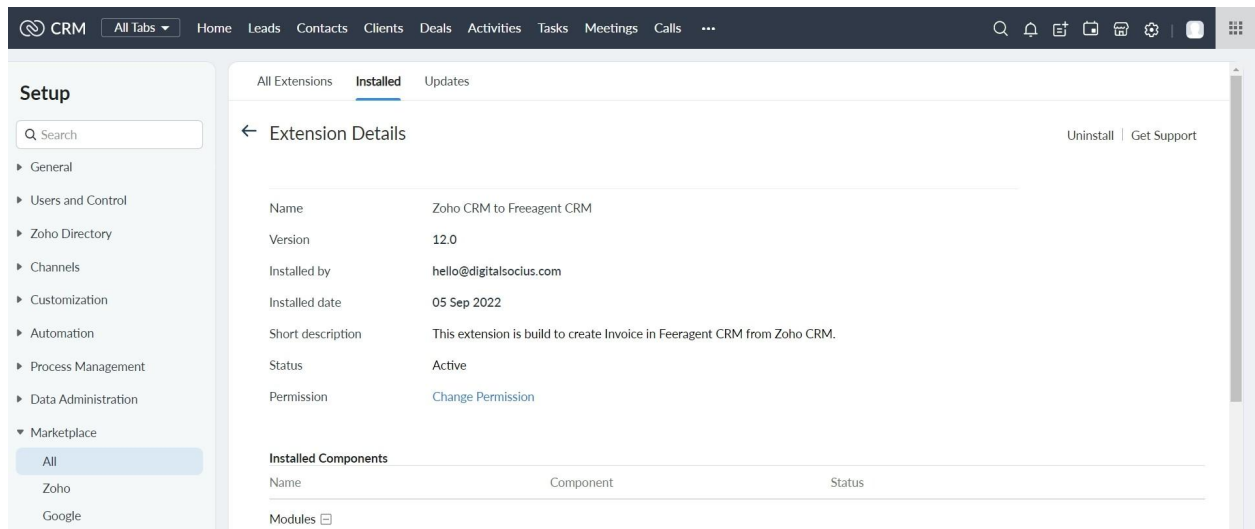1. Click the checkboxes and select Continue

2. Select the users/profiles that should have access to the extension and click on Confirm

3- Installation begins

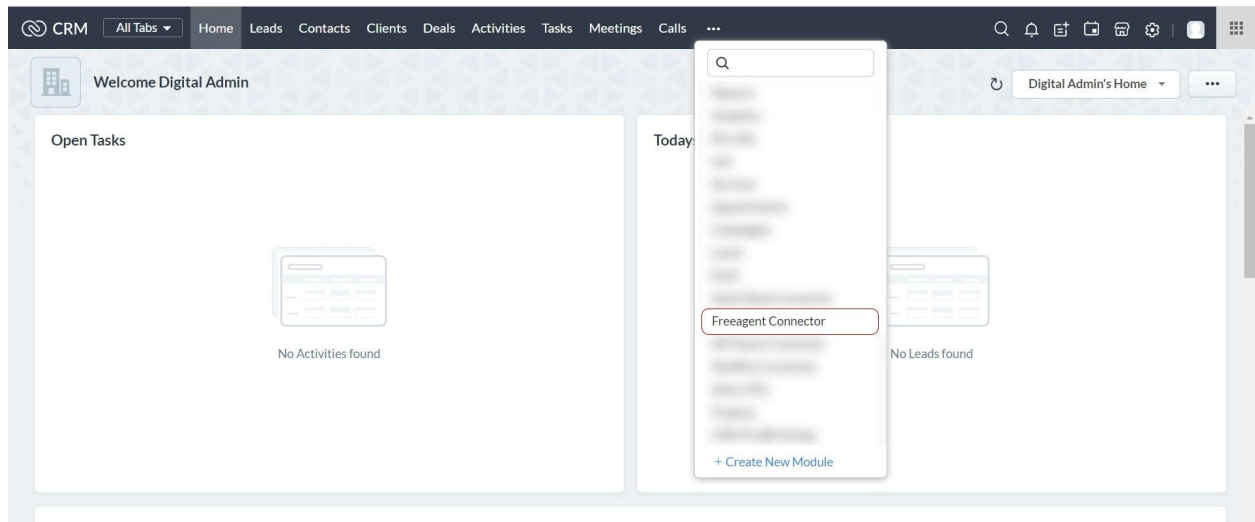## 4- You will see this page upon successful installation of the extension

5- Search for Freeagent CRM connector in the search tab

6- Connect to your Freeagent account

Connect With Freeagent

Connect

7- Input your Freeagent login details and click on **Approve App**

8- Click on approve

Before you can authorise third party applications, you need to confirm that your ▓▓▓▓▓▓▓▓▓▓▓▓▓▓ email address is correct.

Send confirmation email

Zoho CRM and Freeagent Connectivity

Push zoho crm Quotes to freeagent Invoice

You can revoke any application's access to your FreeAgent account by going to
Connections → Approved Applications

Terms of Service · Privacy Policy

Customer Support
Call 0800 288 8691 · support@freeagent.com
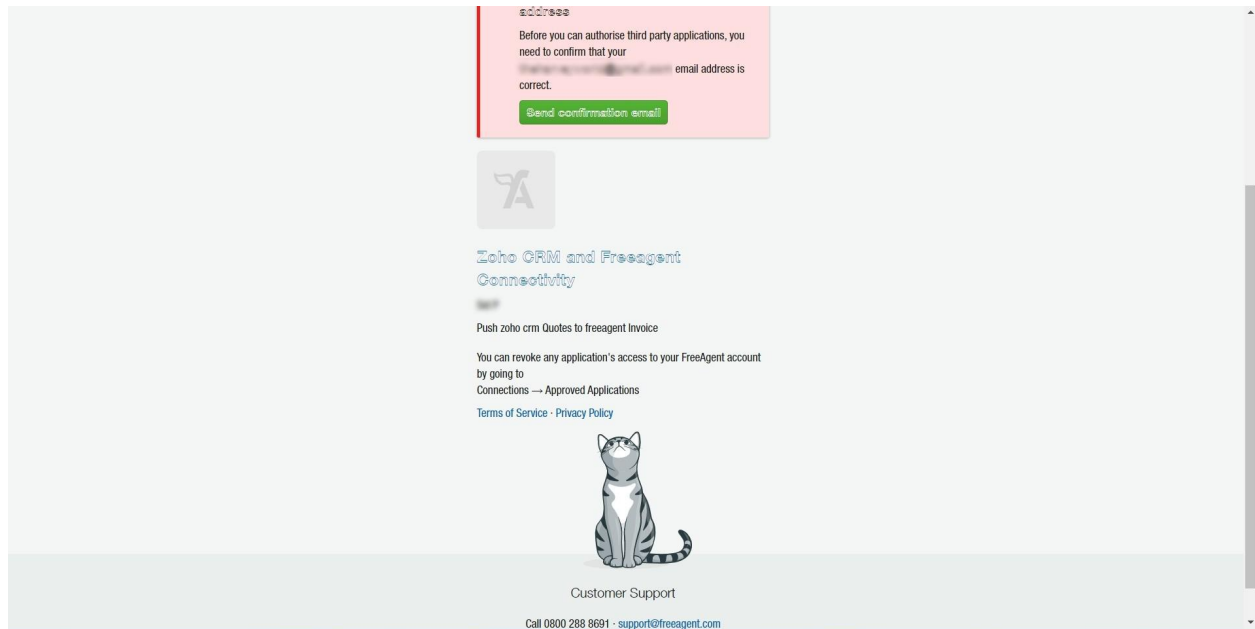
9- Login into your mail to confirm your account

10- Once you confirm your account, you have successfully connected your Freeagent to Zoho

crmsociusxeroextension.co.uk/freeagent/callback.php?code=1ElbHV77J-m2GoYz6k2Oc-t-MJ5pspgw3K37I--SG&state=696799738 - Google Chrome

Not secure | crmsociusxeroextension.co.uk/freeagent/callback.php?code=1ElbHV77J-m2GoYz6k2Oc-t-MJ5pspgw3K37I--SG&state=696799738

You are connected with Freeagent successfully!!
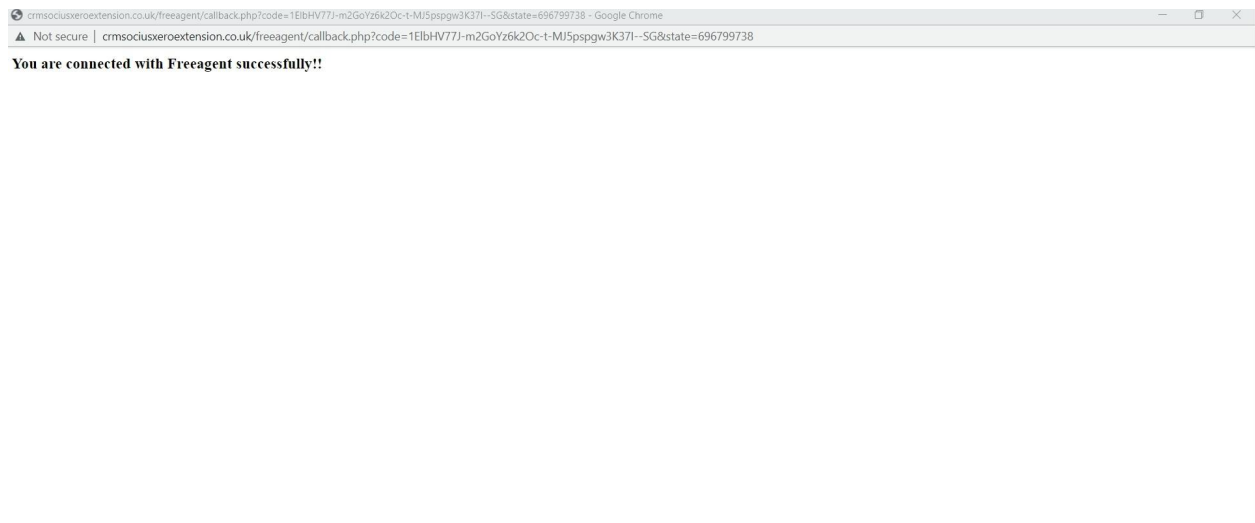
11- The Freeagent Connector will show this when connection has been successful

UNINSTALLATION STEPS

How To Uninstall Extension in Zoho

It is quick and easy to uninstall this extension in your Zoho environment without causing any hiccups.

1. Go to set up;
2. Scroll down and click on marketplace or type it in the search bar
3. Click on installed, scroll down to Zoho CRM to Freeagents Meeting
4. Click on uninstall

POST INSTALLATION

After successfully installing the **Freeagent Extension For Zoho CRM, these fields will be auto-created in your CRM.**

Field name	Field Type	Field Description
Freeagent Invoice Date	Date field	This is a mandatory field that shows when the invoice was created.
Freeagent Invoice Created	Picklist Field	Users are not required to fill this field during record creation as it autopopulates based on if the record was successfully created or not.
Sent to Freeagent	Checkbox field	This is a mandatory field when a record is being created. Without checking this checkbox field, record will not be sent to Freeagent.

HOW-TO-USE

Type the **Subject** of the Invoice and select the **Client Name**. These are mandatory fields.

Ensure the **Sent to Freeagent** checkbox is checked and **Freeagent Invoice Date** is selected.

Add invoice line items and click on save

Edit Invoice <u>Edit Page Layout</u>

Cancel   Save & New   **Save**

Invoiced Items

ADD INVOICE LINE ITEM AND SAVE

S.NO	Product Name	List Price (£)	Quantity	Amount (£)	Discount (£)	Tax (£)	Total (£)
1	iPhone 14 (10010)	6900	3	20700	0	0	20700
	Description						

+ Add row

Sub Total (£)	20700
Discount (£)	0
Tax (£)	0
Adjustment (£)	0
Grand Total (£)	20700

Terms and Conditions

Terms and Conditions

Description Information

Description

Client Script ▲

After saving, if the Invoice was successfully created, the 'Freeagent Invoice Created' field will auto switch to 'Yes' or 'No' if it wasn't successfully created.

The 'Freeagent Invoice Created' field is automatically changed to 'Yes' which signifies that the invoice has been successfully created in Freeagent as well.

VIDEO LIBRARY

Video Installation Guide

[CRMSocius Zoho CRM to Freeagent Installation Guide](#)

How-to-use Video

[How To Use The CRMSocius Zoho CRM To Freeagent Extension Video](#)

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