

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 Freeagent 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.

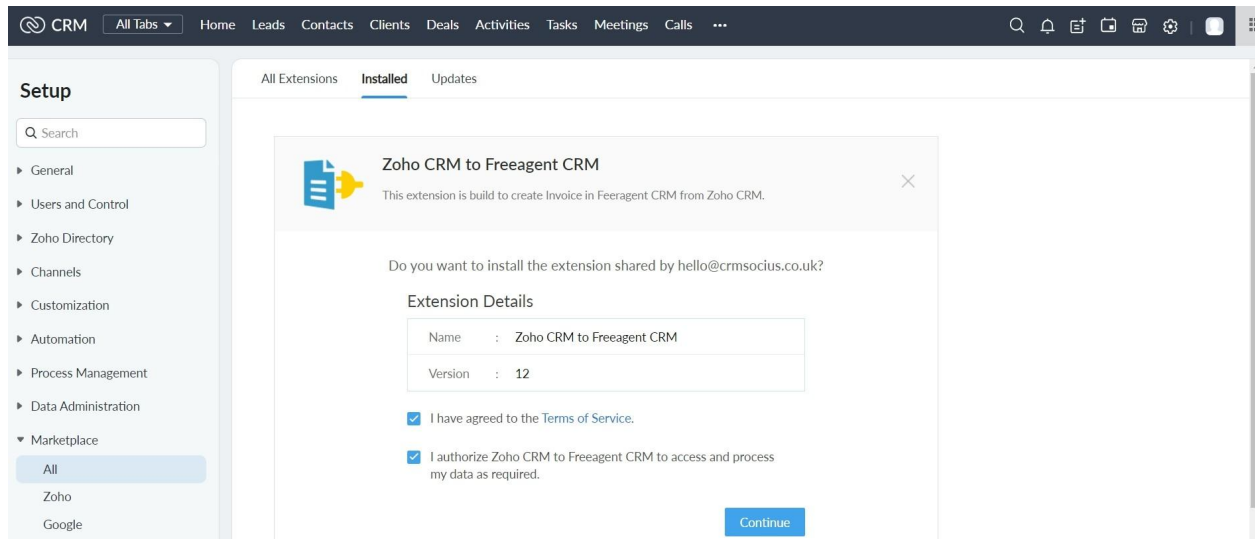
From FreeAgent to Zoho:

Integrates updated Freeagent Invoice status back in Zoho CRM.

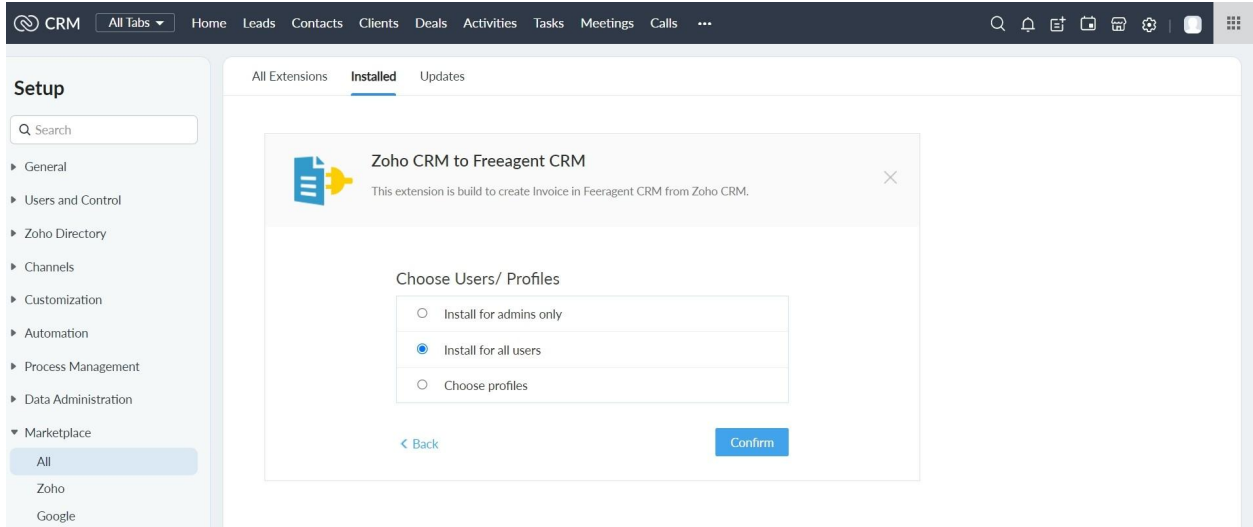
## INSTALLATION STEPS

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

1. Click the checkboxes and select Continue

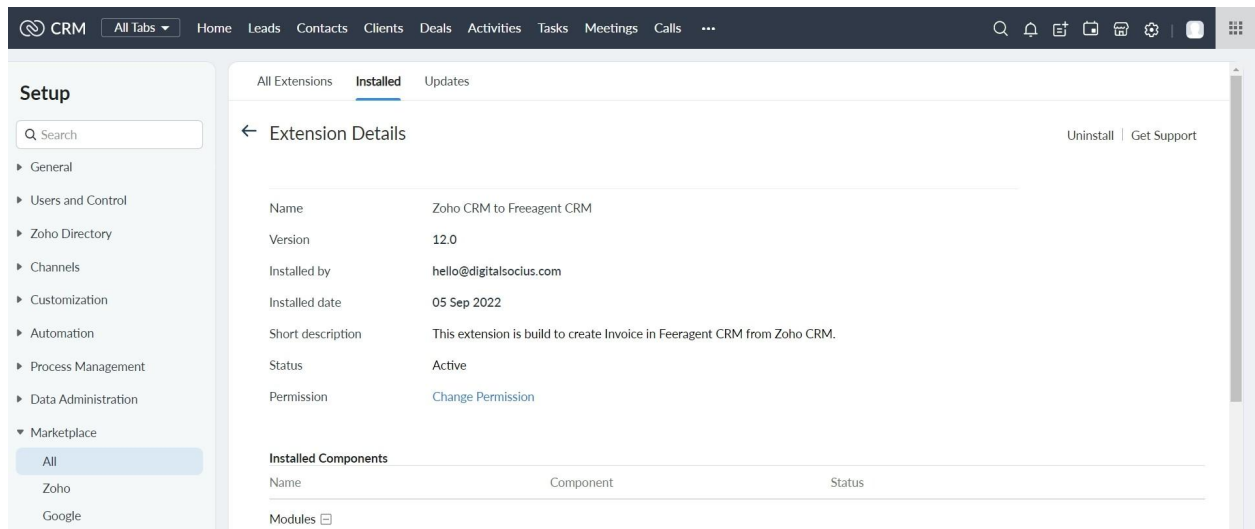


2. Select the users/profiles that should have access to the extension and click on Confirm



### 3- Installation begins

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



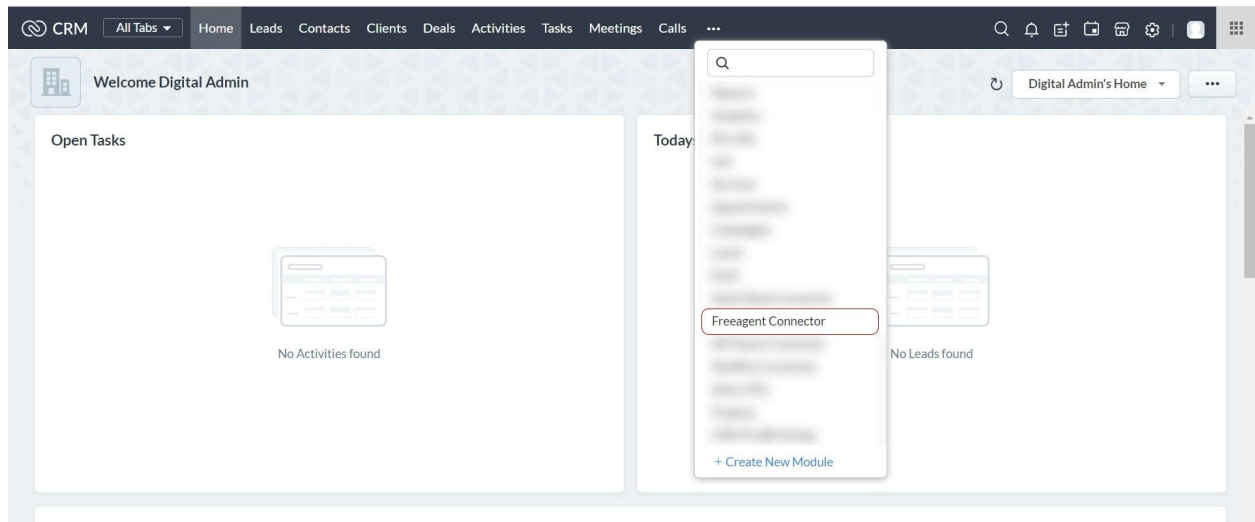
The screenshot displays the Zoho CRM interface. At the top, a navigation bar includes the CRM logo, 'All Tabs', and various modules like Home, Leads, Contacts, Clients, Deals, Activities, Tasks, Meetings, and Calls. Below this is a 'Setup' sidebar with a search bar and a list of categories: General, Users and Control, Zoho Directory, Channels, Customization, Automation, Process Management, Data Administration, and Marketplace. The Marketplace section is expanded, showing 'All', 'Zoho', and 'Google'. The main content area is titled 'Extension Details' and shows the 'Installed' tab selected. The extension details include:

- Name: Zoho CRM to Freeagent CRM
- Version: 12.0
- Installed by: hello@digitalsocius.com
- Installed date: 05 Sep 2022
- Short description: This extension is build to create Invoice in Feeragent CRM from Zoho CRM.
- Status: Active
- Permission: Change Permission

Below the details is a section for 'Installed Components' with a table header:

Name	Component	Status
Modules		

## 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**




Approve app

Email address

Password

[show](#)

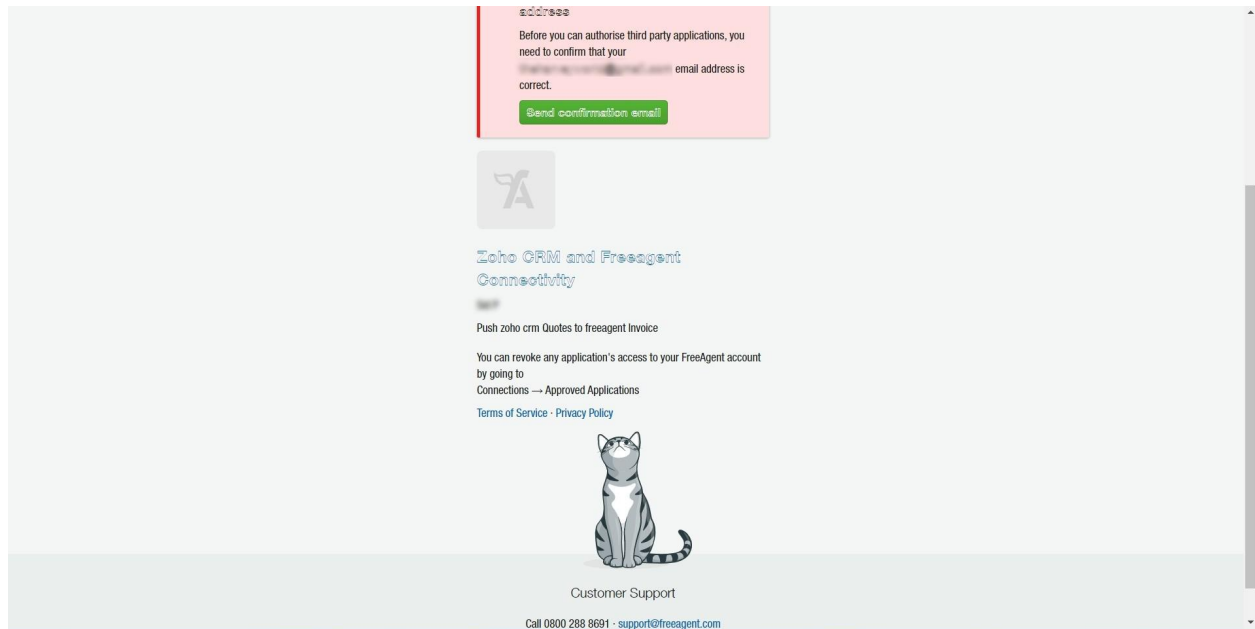
[Approve app!](#)



Customer Support

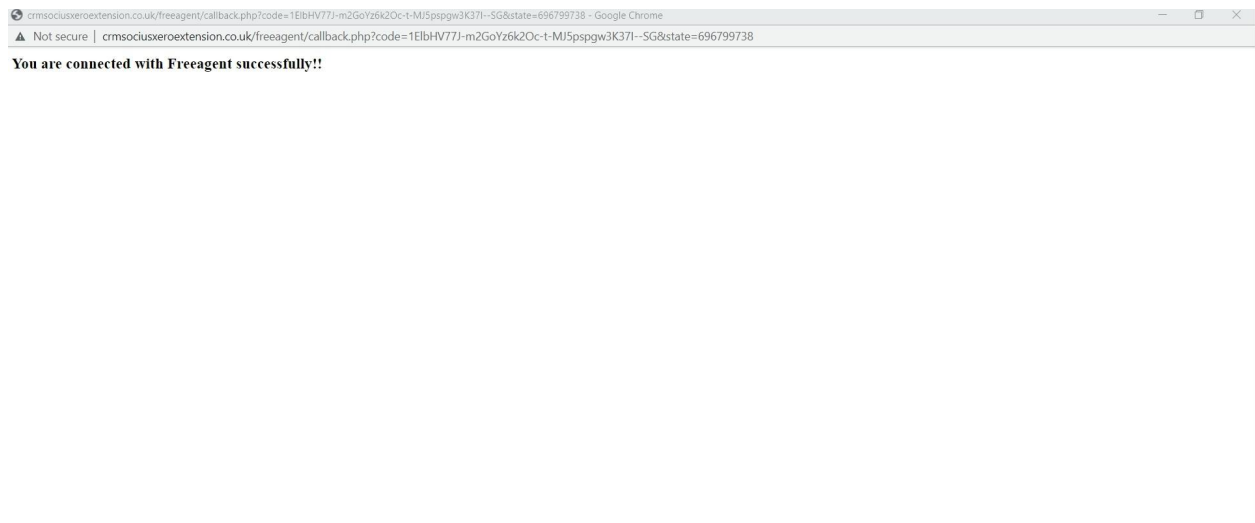
Call 0800 288 8691 · [support@freeagent.com](mailto:support@freeagent.com)

## 8- Click on approve



## 9- Login into your mail to confirm your account

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





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**.

The screenshot shows the 'Create Invoice' form in Zoho CRM. At the top right, there are buttons for 'Cancel', 'Save & New', and 'Save'. The form is divided into two columns of input fields. The left column includes fields for Subject (Laptop Sales), Invoice Date (Dec 14, 2022), Due Date (MMM D, YYYY), Sales Commission (\$), Client Name, Contact Name, Currency (USD), Sent to Xero (checkbox), Xero Record Link, QB ID, and QB Invoice Number. The right column includes Purchase Order, Excise Duty (\$), Status (Created), Exchange Rate (1.000000000), Xero Invoice Number, Xero ID, and Sent to QB (checkbox). Below these columns are two highlighted fields: 'Freeagent Invoice Date' (Dec 14, 2022) and 'Freeagent Invoice Created' (-None-). At the bottom left, there is a 'Sent to Freeagent' checkbox which is checked.

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.

**Edit Invoice** [Edit Page Layout](#) Cancel Save & New Save

**Invoice Information**

Invoice Owner	Digital Admin	Sales Order	
<b>Subject</b>	iphone 14 sales	Purchase Order	
Invoice Date	Dec 14, 2022	Excise Duty	£
Due Date	MMMD, YYYY	Status	Created
Sales Commission	£	Exchange Rate	1.380000000
<b>Client Name</b>	Demo Company	Xero Invoice Number	
Contact Name		Xero ID	
Currency	GBP	Sent to QB	<input type="checkbox"/>
Sent to Xero	<input type="checkbox"/>	Freeagent Invoice Date	Dec 14, 2022
Xero Record Link		Freeagent Invoice Created	-None-
QB ID			
QB Invoice Number			
Sent to Freeagent	<input checked="" type="checkbox"/>		

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

**Edit Invoice** [Edit Page Layout](#) Cancel Save & New Save

**Invoice Information**

Invoice Owner	Digital Admin	Sales Order	
Subject	iphone 14 sales	Purchase Order	
Invoice Date	Dec 14, 2022	Excise Duty	£
Due Date	MMMM, YYYY	Status	Created
Sales Commission	£	Exchange Rate	1.380000000
Client Name	Demo Company	Xero Invoice Number	
Contact Name		Xero ID	
Currency	GBP	Sent to QB	<input type="checkbox"/>
Sent to Xero	<input type="checkbox"/>	Freeagent Invoice Date	Dec 14, 2022
Xero Record Link		Freeagent Invoice Created	-None-
QB ID			
QB Invoice Number			
Sent to Freeagent	<input checked="" type="checkbox"/>		

**ENSURE THE 'SENT TO FREEAGENT' CHECKBOX IS CHECKED**

## Add invoice line items and click on save

Edit Invoice [Edit Page Layout](#)

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) <small>Description</small>	6900	3	20700	0	0	20700

+ Add row

Sub Total (£) 20700

Discount (£) 0

Tax (£) 0

Adjustment (£) 0

Grand Total (£) 20700

### Terms and Conditions

Terms and Conditions

### Description Information

Description

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.

Create Invoice [Edit Page Layout](#) Cancel Save & New Save

Client Name	<input type="text"/>	Xero Invoice Number	<input type="text"/>
Contact Name	<input type="text"/>	Xero ID	<input type="text"/>
Currency	USD	Sent to QB	<input type="checkbox"/>
Sent to Xero	<input type="checkbox"/>	Freeagent Invoice Date	Dec 14, 2022
Xero Record Link	<input type="text"/>	Freeagent Invoice Created	-None-
QB ID	<input type="text"/>		
QB Invoice Number	<input type="text"/>		
Sent to Freeagent	<input checked="" type="checkbox"/>		

*Note: The 'Freeagent Invoice Created' dropdown menu is shown with options: -None-, Yes, No.*

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

CPQ > Invoices  
← **iphone 14 sales** Edit ... < > Last Update: 12:42 PM

**Related List**

- Notes
- Attachments
- Open Activities
- Closed Activities
- Emails
- Links  
[Add Link](#)

**Overview** **Timeline**

<b>Invoice Information</b>			
Invoice Owner	Digital Admin	Invoice Number	419979500008239045
Subject	Iphone 14 sales	Sales Order	—
Invoice Date	Dec 14, 2022	Purchase Order	—
Due Date	—	Excise Duty	—
Sales Commission	—	Status	Created
Client Name	Demo Company	Created By	Digital Admin Wed, 14 Dec 2022 12:42 PM
Contact Name	—	Modified By	Matt Omeike Wed, 14 Dec 2022 12:42 PM
Currency	GBP	Exchange Rate	1.38
Sent to Xero	—	Xero Invoice Number	—
Xero Record Link	—	Xero ID	—
QB ID	—	Sent to QB	—
QB Invoice Number	—	Freeagent Invoice Date	Dec 14, 2022
Sent to Freeagent	✓	Freeagent Invoice Created	Yes
<b>Address Information</b>			

Locate Map

## 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](#)

[PRIVACY POLICY](#)

[TERMS OF SERVICE](#)