OVERVIEW

The CRMSocius Zoho CRM to Xero extension is a fast and easy way to sync your Zoho CRM records such as Companies, Contacts, Quotes, Sales Orders and Invoices to your Xero account. With a few clicks of a button, CRMSocius Zoho CRM to Xero extension saves you from laborious and monotonous tasks and also ensures your accounting has less room for errors.

Key Features

Automatically create a module to easily connect with your Xero account.

Auto creates a module in the CRM that connects to Xero

Updates record successfully pushed to Xero in CRM

No coding required; easy set up

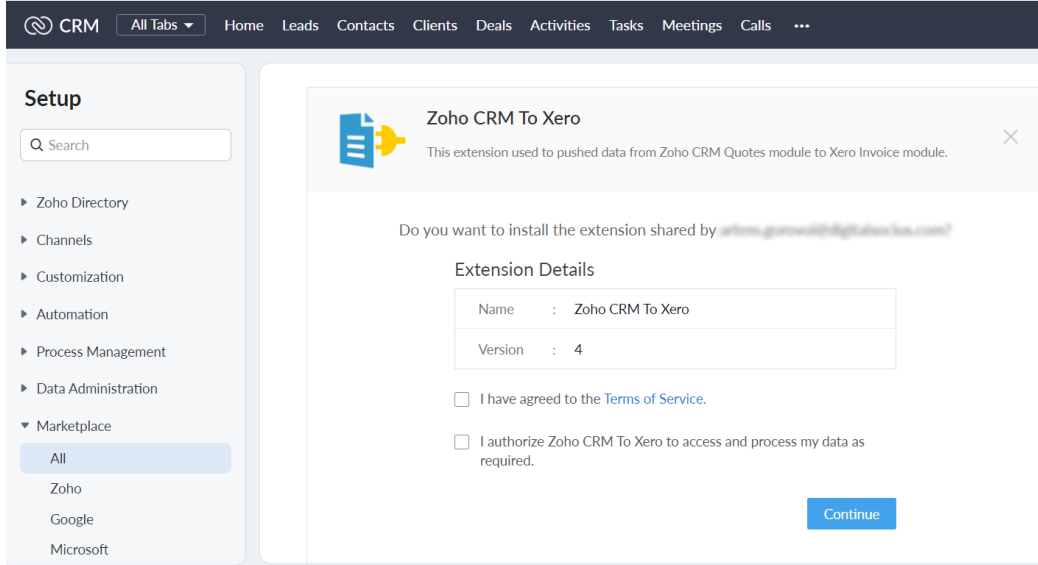No additional field creation required in the CRM

Use

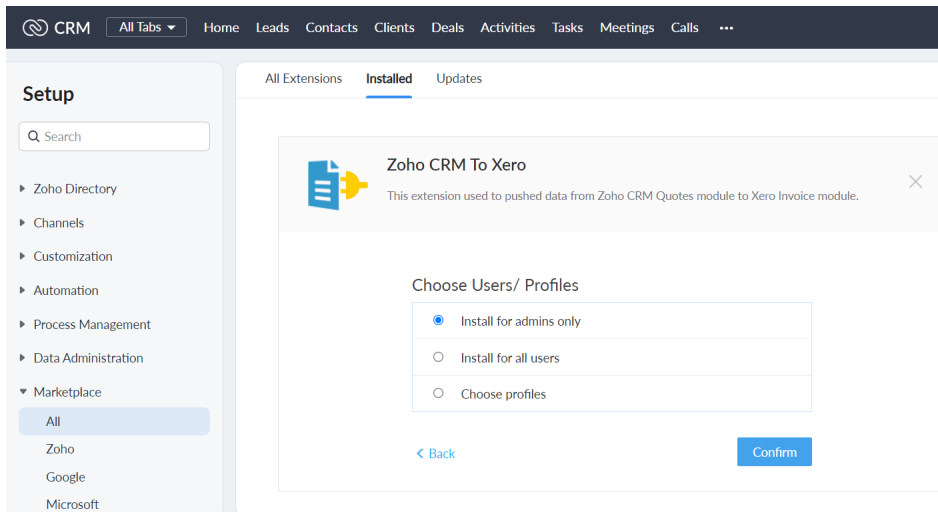- Sync single or multiple accounting module in Zoho CRM (Invoice, Sales Order, Quote) to Xero invoice module.
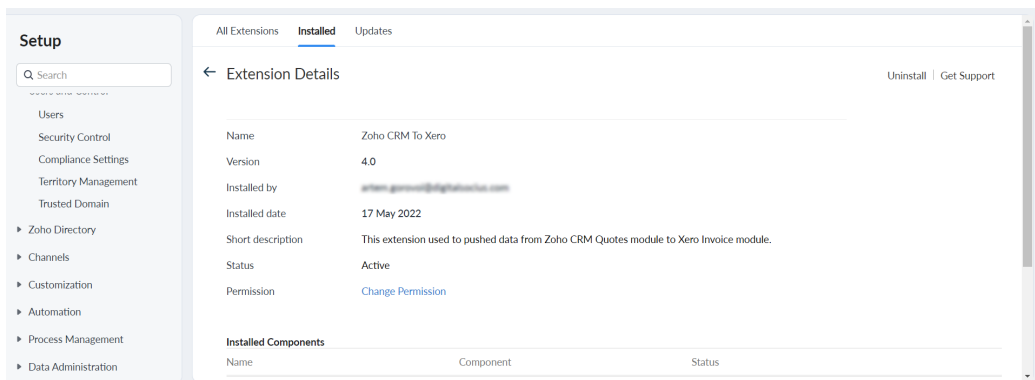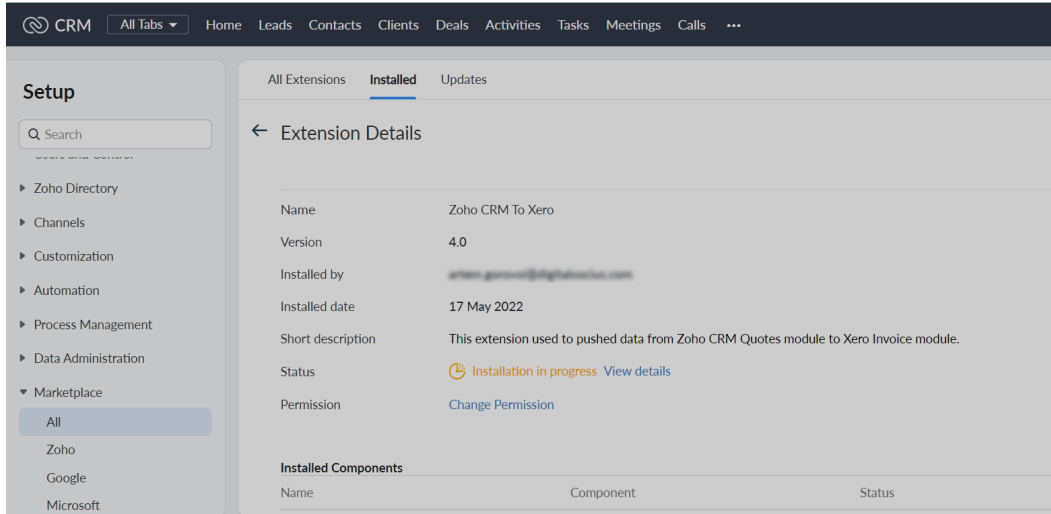
INSTALLATION STEPS

Search for Zoho CRM To XERO in Marketplace or click on the link on the website.

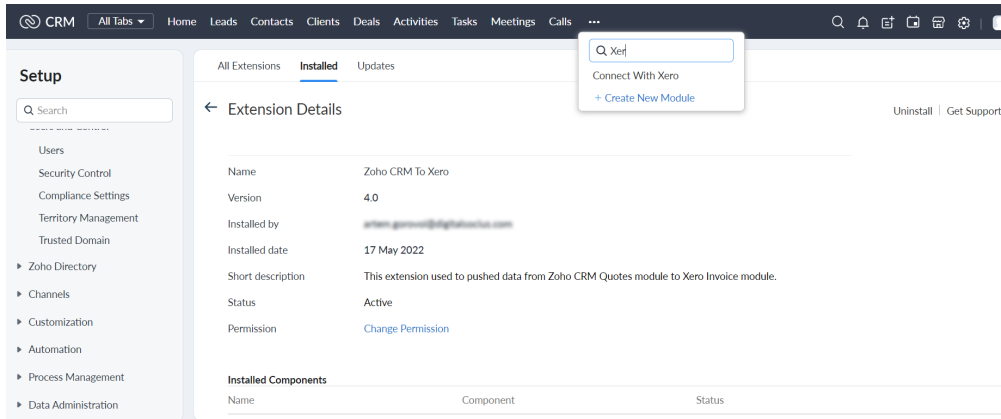1. Click the check boxes and select Continue

2. Select the users/profiles that should have access to the extension and click on Confirm
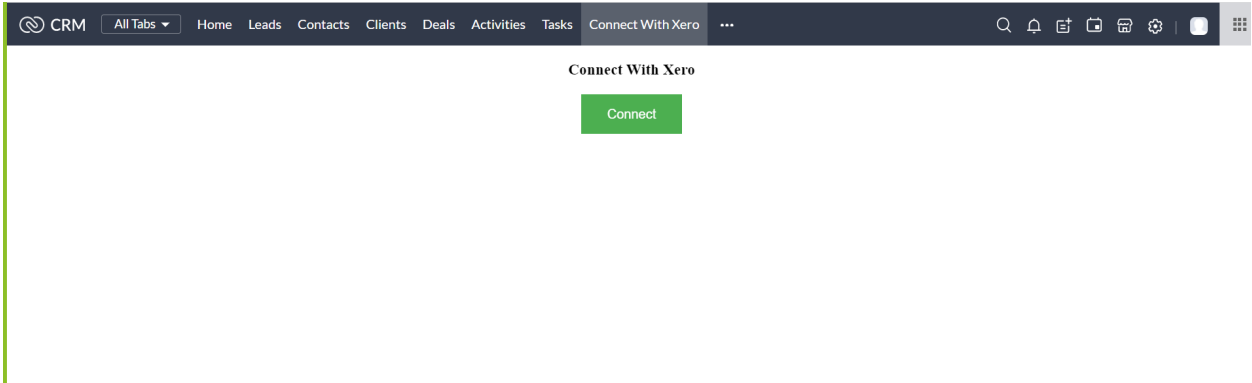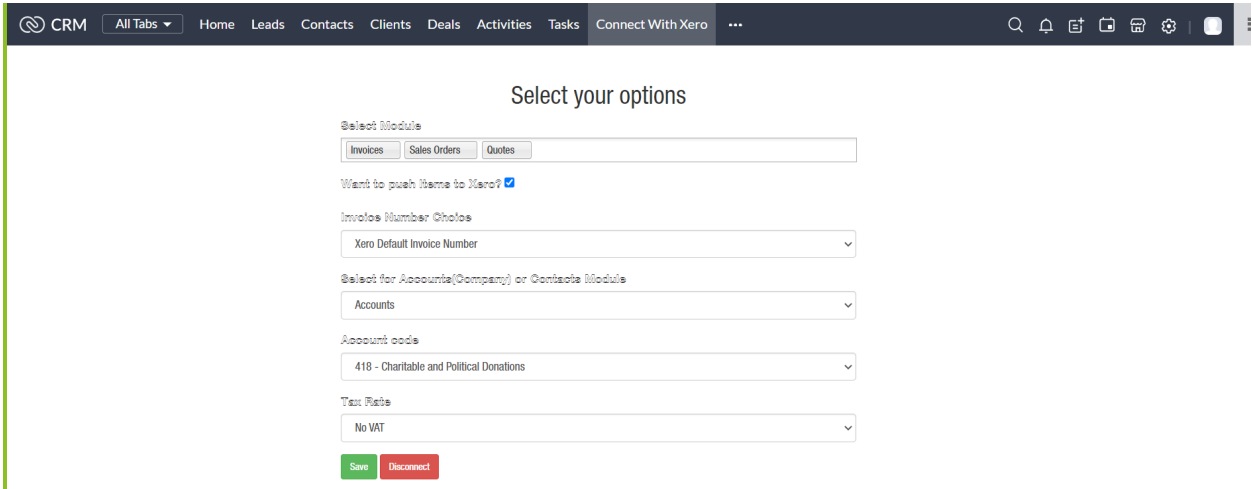
After successful installation of the extension in your Zoho CRM, search for Xero and select 'Connect to Xero'

Connect to your Xero account

After you've successfully connected into your Xero account, you're ready to for more 'you time' and less time consuming tasks

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 to marketplace or type in marketplace in the search bar
3. Click on installed, scroll down to Zoho CRM to Xero
4. Click on uninstall