

# SAP Business One and Zoho CRM Integration



## SAP BUSINESS ONE AND Zoho CRM INTEGRATION

# Synchronization Points

## Customer

- **Lead sync**  
Leads entered in Zoho CRM by the corresponding Sales Rep will be synced to SAP Business One B.P. Master Data as Leads. According to your business requirements, the SAP Business One B.P. Leads can also be synced to Zoho CRM.
- **Account & Contact sync**  
When Leads are qualified in CRM and converted into Accounts and Contacts, the corresponding Lead in SAP Business One B.P. Master Data will be updated as Customer and the CRM Contact will be added as Contact Person in that B.P. Master Data. Similarly, SAP Business One B.P. Customer and Contacts will be synced to CRM system as new Account and Contacts.

## Product

- **Products Sync**  
Master items from SAP Business One will be uploaded as Products in Zoho CRM.
- **Price List Sync**  
One Price List in SAP Business One will be mapped as the standard price in CRM. Additional Price Lists will be mapped with Price Books created in Zoho CRM. When Item is synced from SAP Business One to Zoho CRM, multiple Price List's price will be synced to Zoho Price Books. Price Books are generally assigned to different customer groups to offer discounted price to Resellers/Wholesalers.

## Sales

- **Potential Sync**  
The Zoho CRM Sales Potentials along with their current stage and probability can be added as Sales Opportunities in SAP Business One.
- **Sales Quotation sync**  
All the Zoho CRM Sales Quotes for any particular Account will be synced as SAP Business One Sales Quotations for further Order processing.
- **Sales Order Sync**  
The Zoho CRM Sales Orders with its current status will be synced as SAP Business One Sales Orders. Items selected, tax, billing, shipping address, due date, etc. of the Sales Order will be synced in SAP Business One.
- **Payment Method sync**  
APPSseCONNECT will sync back the payment method from Zoho CRM to SAP Business One for sales. Zoho CRM Invoices will be synced to A/R Invoice in SAP Business One.

# Transform the way you work and improve business efficiency!

APPSeCONNECT-led business processes streamline your operational workflow and help you expand customer and employee satisfaction amplifying revenue numbers and growth.

## SAVE TIME AND EFFORT

Seamlessly connect business-critical applications and save huge amount of time and effort by automating business processes

## BOOST PRODUCTIVITY

Eliminate the need for manual data entry, resulting reduced risk of errors, increased productivity, quality and a happier workforce

## FOCUS ON PROFITABILITY

Streamlined business processes lets you focus on what matters the most: increasing customer satisfaction, revenue, growth!

## What our customers say...



*Without APPSeCONNECT, I don't think we could have grown our website to where it is now. In terms of what is out there in the market, it is the cheapest option that would deliver a reliable service.*

**Erika Weihmayer**  
Prana Biovegan



*The product is easy to work with. Throughout the process, APPSeCONNECT was very accommodating of our specific requests.*

**Victoria Schweistein**  
Lumondi Inc

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