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Zoho CRM - Abtrac Synchronization Scope Document

Document History

Version	Date	Author(s)	Revision Notes	Status
0.1	1/10/21	Danny Nissani	Initial Version	Draft
1.1	21/10	Danny Nissani	Ammendements section 2.	Draft
1.2	28.10.21	Julia Roeberts	Cheal amendments added throughout doc	Draft
1.3	18.11.21	Brad Pitt	Cheal updates	Final
1.4	30.11.21	Julia Roeberts	First run of post sync comment	Final

* Please keep in mind that any ammenntemnt to this document after it is in status final may (likely) increase the implementation costs and duration.

Associated Documents

Version	Date	Document Name and Location

Document Approvals Sign Off

Role	Name	Signature	Date
Solution Architect	Danny N.	<i>Danny Nissani</i>	10.01.22
Developer	Max B.	<i>Max B</i>	10.01.22
Customer	Brad Pitt	<i>Brad Pitt</i>	12.01.22

Document legend

- Needs Customer attention - **Green highlighted text**
- Watling for customer approval - **Orange highlighted text**
- Needs estimation from Holistic CRM - **Red highlighted text**

1. Background

Customer Cheal wish to sync Zoho CRM Solution to ABTRAC solution. Once a Zoho CRM Job (Original Deal module) is created a sync Job would be created in ABTRAC. With the exception that if the job type is “additional works” the sync would’nt get activated.

2. Zoho CRM -> ABTRAC Integration (1 direction sync)

In Zoho CRM a Job is allocated to a Company (Originally an Account) and to Contact or just to Cotnact.

2.1. a Job in Zoho CRM is allocated to a Company (Originally an Account) and to Contact:

Transfer to Abtrac, Zoho CRM Companies (Accounts) and Zoho CRM Contacts that match the conditions below:

2.1.1. Only when Company has a related Job in the “Propsoals (Financial)” Pipeline and

2.1.2. When that related Job, the Job Type is set to “New Job”. and

2.1.3. When Company and related Contact **are not already in ABTRAC**

2.1.4 If a Client already exists in ABTRAC (secion 2.1), but has the Check Box fileds “Current” and/or “Billable”, in Abtrac is unchecked, **do not sync** the existing Zoho Company but mark in Abtrac those two Check Box fileds as checked (see picture below).

<p>Do 2.1 if {(2.1.1 and 2.1.2 and 2.1.3) are True} But if 2.14 is True (Do not Sync) & mark in Abtrac those two Check Box fields as checked</p>

2.2 a Job in Zoho CRM is allocated to a CRM Contact only:

Transfer to Abtrac, Zoho CRM Contacts that match the conditions below:

2.2.1 Only when Zoho CRM Contact has a related Job in the 'Proposals (Financial)' Pipeline

and

2.2.2 When in that related Job, the Job Type is set to "New Job".

and

2.2.3 When the Zoho CRM Contact is not already in ABTRAC
Comment for developer: Search needs to be made at the Abtrac Client record (and not as People)

2.2.4 If in Abtrac a Client already exists, but has the Check Box fields "Current" and/or "Billable", unchecked, **do not sync** the existing Zoho Contact but mark in Abtrac those two Check Box fields as checked.

Do 2.2
if
{(2.2.1 and 2.2.2 and 2.2.3) are True}
But if
2.2.4 is True
(Do not Sync) & mark in Abtrac those two Check Box fields as checked

The screenshot shows the Abtrac client details page for '5666 - 1886 Limited'. The page is divided into several sections:

- Client Details:**
 - Name: 1886 Limited
 - Address: 1886 Ltd
 - People: Current (highlighted with a red circle)
 - is a sub-consultant
 - Abbreviation: 1886 Ltd
 - Billable (highlighted with a red circle)
 - System Code: 5666
 - Synchronised
- Key Staff, Client Type and Rating:**
 - Client Manager: Calvin Watson
 - Client Manager 2: [Empty]
 - Client Type: [Empty]

3.1 Jobs

Only jobs that match the conditions below:

3.1.1 "Job Type" field is set as "New Job".

And when the job Pipeline line is set to "Proposals (Financial)". As mentioned in 2.1.2. & 2.2.2

3.2 Products/ Items

Won't be synced (just created manually if required). Unique Identifying field would be SKU.

3.3 Field Mapping

3.3.1 Zoho CRM Companies (originally Accounts)

Zoho CRM Account	Abstract Client	Comments
Company Name	Name	
(only the first 8 characters) of the "Company Name"	Abbreviation	
Company Owner	ClientOwner	
Head Office	*Office	
Created by	CreateDate	
Not in CRM	Description	Replicate company name
Delivery Address Line 1	Line 1	
Delivery Address Line 2	Line 2	
Delivery Address Line 3	Line 3	
Delivery Address Line 4	Line 4	
Delivery Postcode	Post Code	
Postal Address Line 1	Line 1	
Postal Address Line 2	Line 2	
Postal Address Line 3	Line 3	
Postal Address Line 4	Line 4	
Postal Post Code	Post Code	

Not in CRM	"Current"	CheckBox- Checked
Not in CRM	"Billable"	CheckBox- Checked

3.3.2 Zoho CRM Contacts (If there is no Company related to a job, there will be a Contact, and these fields will sync to Abtract Client)

Zoho CRM Contact	Abtract Client	Comments
First Name	Name	2 fields from zoho need to pull through to one field in abtrac, first name first, then last name
Last Name	Name	
(only the first 8 characters) of the "Contact Name"	Abbreviation	
Contact Owner	ClientOwner	
Cheal Office	*Office	
Created by	CreateDate	Puling the date only form the "Created by" Zoho CRM fied
Delivery Address Line 1	Line 1	
Delivery Address Line 2	Line 2	
Delivery Address Line 3	Line 3	
Delivery Address Line 4	Line 4	
Delivery Postcode	Post Code	
Postal Address Line 1	Line 1	
Postal Address Line 2	Line 2	
Postal Address Line 3	Line 3	
Postal Address Line 4	Line 4	

Postal Post Code	Post Code	
Not in CRM	"Current"	CheckBox- Checked
Not in CRM	"Billable"	CheckBox- Checked

3.3.3 Zoho CRM Contacts

Zoho CRM Contact	Abstract People	Comments
First Name	First Name	
Last Name	Last Name	
Job Title	Role	
Phone	Phone	
Mobile	Mobile	
Email	Email	

3.3.4 Zoho CRM Jobs (originally Deals) Initial update

Zoho CRM Jobs	Abstract Job	Comments
Job Name	Job Description	
Job Code	Job Code	Unique
"Job Name"+ "Site Address Line 1" + "Site address Line 2" + "Site Address suburb/city"	Job Description	4 fields from zoho need to pull through to one field in abtrac, job name first, then site address lines – This doesn't seem to be happening
Site Address Line 1	Address 1	
Site Address Line 2	Address 2	

Site Address Suburb/City	City	
Site Address State/Region	State/Region	
Site Address Postcode	Post code	
Job Owner	*Job Manager	
Job Creation Date (Date+Time field)	*Creation Date (Date Field)	
Cheal Office	*Office	
Team	*Team	NA for the time being
Sector	*Job Type	
Work Source	Work Source	
No field in zoho	"Job Status" set to 'not confirmed'	We want the Abtrac status to be 'not confirmed' for all jobs when created
No field in zoho	"Current"	CheckBox checked
No Field in zoho	"Billable"	CheckBox unchecked
Advertising/Campaign Source	Work Source Details	Doesn't seem to be working
Due Date	Expected Completion	

3.3.5 Zoho CRM Jobs (originally Deals) - Future updates

Zoho CRM Jobs	Abtract Job	Comments
When a Job reach stage of "Job Won"	"Job Status" field updated to "In Progress"	

3.4 We will install an "on-off" switch to stop and renew the sync.

3.5 Integration principles:

- Reducing as much as possible, human touch, to reduce human error. We try to automate as much as we can.
- Making the process easy, reducing the amounts of clicks to minimum.
- Provide clear indication that integration is working and clear notifications if it's not.
- Integrate all the related master data so that the sync will work (this means that if you wish to sync invoices, you would need first to integrate Products, Accounts and Contacts that are the related master data to Invoice).

3.6 Integration Training

- This offer cover one hour of training. We recorded our trainings so that the relevant employees can watch the trading when required.

3.7 Out of scope:

- System redesign
- Synchronzatin of any other additional entiaties (if required), would be prices seperatly.
- Any other type of aoutmaoitn is out of scope.

3.8 Misc

Customer is required to not delete or edit existing sync cofiguratoion data as this would stop the sync.