How to export leads/contacts to QFloors via QConnect

Step 1: Search for Extension

Go to the Zoho Marketplace and search for "QConnect by QFloors".



Step 2: Install

Click "Install".



Step 3: Agree to Terms and Conditions

Click the two checkboxes and click "Continue".

| Extensions In | stalled Updates | |
|---------------|--|--|
| QFLOORS | QConnect by QFloors Send Zoho Contact and Lead information to QFloors Software. QConnect is a paid service or is FREE when you sign up with QProPay. To obtain your required username and password, please contact QFloors at 801-563-0140. | |
| D | o you want to install the extension shared by qproreports@qprosoftware.com? Extension Details Name : QConnect by QFloors | |
| | Version : 5 | |
| | I authorize QConnect by QFloors to access and process my data as required. Continue | |

Step 4: Choose Users/Profiles

You will be prompted to choose which users will have the extension installed. Click "Confirm".

| Extensions In | Installed | |
|---------------|--|---|
| | QConnect by QFloors Send Zoho Contact and Lead information to QFloors Software. QConnect is a paid service or is FREE when you sign up with QProPay. To obtain your required username and password, please contact QFloors at 801-563-0140. | × |
| | Choose Users/ Profiles | |
| | Install for admins only | |
| | Choose profiles | |
| | < Back Confirm | |

Step 5: Enter Username and Password

You will be prompted to enter your username and password supplied to you by QFloors. After you have entered your credentials click the "Save" button. If you haven't received your credentials from QFloors please contact us at 801-563-0140.



QConnect by QFloors extension will add additional QFloors specific fields as well as a "Export to QConnect" button in the Contacts View Page. The only required fields to successfully export to QConnect are: Last Name (If there is an Account present, it will replace the Last Name in QFloors), Email and Country. **NOTE** Leave the QConnect ID field blank as this will be autogenerated by QConnect after the contact has been successfully exported.

| Email Opt Out | | Preferred Method of C | Option 1 Option 2 | |
|------------------------|-------------|----------------------------|-------------------|--|
| Phone | Phone | QProPay Prospective | Option 1 + | |
| Mobile | Phone | Layout | Single Line | |
| QFloors Export Options | Option 1 - | QConnect ID | Single Line | |
| QFloors Location Name | Single Line | QFloors Location ID | Single Line | |
| QFloors Sales Rep 1 Na | Single Line | QFloors Sales Rep 1 ID | Single Line | |
| QFloors Sales Rep 2 Na | Single Line | QFloors Sales Rep 2 ID | Single Line | |
| Address Information | | | | |
| Mailing Street | Single Line | Other Street | Single Line | |
| Mailing City | Single Line | Other City | Single Line | |
| Mailing State | Single Line | Other State | Single Line | |
| | | | | |

Step 6: Export Contacts to QConnect

Once you have your contact's information ready to export, from the Contacts View Page simply click the "Export to QConnect" button.

| ⓒ CRM All Tabs ▼ Hom | ne Leads Contacts Accou | nts Deals Tasks Meetings N | Aarketplace ···· | Enterprise-Trial Q A E 🖬 🎲 🗐 🏭 |
|---|--|---|--|--|
| ← John Doe | | | Send Email Edit | Export To QConnect 🔹 ···· < > |
| ✓ Related List | Overview Timeline | | | Last Update : 09:35 AM |
| Notes Attachments Deals Open Activities Closed Activities Invited Meetings Products | Contact Owner Email Phone Mobile Department | johndoe@gmail.com C | | Best time for Today Call No best time for the day Email No best time for the day |
| Quotes Sales Orders Purchase Orders Emails Invoices Campaigns | Hide Details Contact Information Contact Owner Account Name Email | Antonio Avila _ johndoe@gmail.com | Lead Source Contact Name Vendor Name | External Referral John Doe |
| Social | Phone Here is your Smart Chat (Ctrl+Space) | | Title | |

Once the contact has been successfully exported you will receive a notification. If there are any errors, they will likewise appear in Zoho's notification message dialog box.

| CRM All Tabs Hon | ne Liads C Message Co This record has b | ontent veen successfully imported into QFloors. | | × | e-Trial C | À 户 E [‡] | ⊡ ≎ | ↓ □ : < → | |
|-------------------------|--|--|--------------|--|-------------|--------------------|--------------|---------------------|---|
| Related List | verview Timeline | | | | | L | ast Update : | : 09:35 AM | |
| Notes | | | | | | | | | |
| Attachments | Contact Owner | Avenue Auto | | | Best tin | ne for | | Today | |
| Deals | Email | johndoe@gmail.com | | | Call | | | | |
| Open Activities | Phone | | | | No best | time for the da | У | | |
| Closed Activities | Mobile | | | | Email | | | | |
| Invited Meetings | Mobile | | | | No best | time for the da | У | | |
| Products | Department | - | | | | | | | |
| Cases | | | | | | | | | |
| Quotes | Hide Details | | | | | | | | |
| Sales Orders | | | | | | | | | |
| Purchase Orders | Contact Information | | | | | | | | |
| Emails | Contact Owner | Antonio Avila | Lead Source | External | Referral | | | | |
| Invoices | Account Name | - | Contact Name | John Do | e | | | | |
| Campaigns | Email | johndoe@gmail.com | Vendor Name | _ | | | | | |
| Social | Phone | | Title | _ | | | | | |
| Chats Channels Contacts | Here is your Smart Chat (Ctrl+Space) | | | Image: A state of the state | Ask Zia | 6 1 | zia (C |) Đ | Ē |

Afterwards the QConnect Field will be automatically populated.**NOTE** Please do not tamper with this field after it has been populated by the extension.

Before successful export:

QConnect Id __

After successful export:

QConnect Id 4390364

Step 7: Enjoy Exporting Contacts to QConnect

We hope you enjoy this extension. Our developers have been hard at work to give our great clients the best experience possible and powerful tools to be successful.

Uninstall/Update Username and/or Password Instructions:

If you ever need to uninstall the extension or update the username and/or password provided by QFloors go to Setup->Marketplace->All->Installed to have access to the QConnect by QFloors extension configuration page. Click "Configure" to update your credentials or "Uninstall" to uninstall the extension. Your contacts already exported to QConnect will not be affected and remain in QFloors. If ever you need help, please contact us at 801-563-0140. We will be happy to help you with any questions/troubleshooting.

| CRM All Tabs - Home | e Leads Contac | cts Accounts | Deals | Tasks | Meetings | Marketplace | ···· | Enterprise- UPGRAD | Frial E | QĻ | Ē | • | ÷ । | |
|---------------------------------|---------------------------|---------------------------------|---------------|-------------------------|---------------|------------------|--------------|-----------------------|--------------|----|---|----|-----|-----|
| Setup | All Extensions | Installed | Updates | | | | | | | | | | | |
| Q Search | | OConnect | | | | | | | | | | | | |
| Users and Control | QFLOORS | Send Zoho Cor | ntact and Lea | s ad inform | ation to QFlo | oors Software. Q | Connect is a | | | | | | | |
| Zoho Directory | | paid service or username and | password, pl | en you sig lease con | tact QFloors | at 801-563-014 | 0. | | | | | | | |
| Channels | | Configure | Uninstall | | | | | | | | | | | |
| Customization | | | | | | | | | | | | | | |
| Automation | | | | | | | | | | | | | | |
| Process Management | | | | | | | | | | | | | | |
| Data Administration | | | | | | | | | | | | | | |
| Marketplace | | | | | | | | | | | | | | |
| All | | | | | | | | | | | | | | |
| Zoho | | | | | | | | | | | | | | |
| Google | | | | | | | | | | | | | | |
| Microsoft | | | | | | | | | | | | | | |
| Developer Space | | | | | | | | | | | | | | |
| ▶ Zia | | | | | | | | | | | | | | |
| | Here is your Smart Chat (| Ctrl+Space) | | | | | | | Ask Zia | e | ษ | ZÁ | Ö | Ð 🖻 |

| Extension Details | Uninstall Get Suppor | | |
|----------------------|--|--------|--|
| Name | QConnect by QFloors | | |
| Version | 5.0 | | |
| Installed by | national generatives con- | | |
| Installed date | | | |
| Short description | Send Zoho Contact and Lead information to QFloors Soft FREE when you sign up with QProPay. To obtain your re- contact QFloors at 801-563-0140. | | |
| Status | Active | | |
| Permission | | | |
| Extension Settings | | 0 | |
| QConnect Username | 100000-04000000000000 | | |
| QConnect- Password | | | |
| Installed Components | | | |
| Name | Component | Status | |
| Modules 🖂 | | | |
| Contacts 🕀 | Module | - | |
| Others III | | | |