

FIELD UPDATE GUIDE

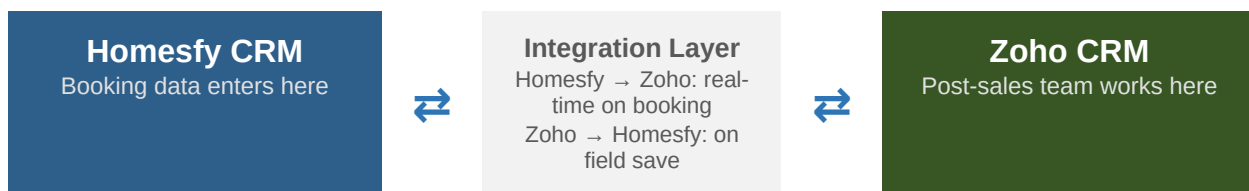
Zoho CRM × Homesfy CRM

Where to make updates — a guide for the post-sales team

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1. How the two systems connect

The Homesfy CRM and Zoho CRM are now integrated — data flows between them automatically. Understanding the direction of that flow tells you where to make a change.



There are three types of fields in Zoho:

Update in Zoho CRM Change this field in Zoho. It will sync automatically to Homesfy CRM via the reverse sync.	Update in Homesfy CRM This field is read-only in Zoho. Changes must be made in Homesfy CRM — they will flow to Zoho automatically.	Zoho only This field exists only in Zoho and does not sync to Homesfy CRM in either direction.
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Important: Any field shown as read-only in Zoho cannot be changed there — typing in it will have no effect or will be overwritten the next time Homesfy CRM pushes an update. Always go to the correct system.

2. The golden rule

Update in Zoho CRM when...	Update in Homesfy CRM when...
• You are recording a financial outcome: AV, passback, invoice status, payment status, cancellation • You are managing the ladder scheme or percentage tracking • You are adding notes, follow-ups, or callbacks for a booking • You are generating or tracking invoices for a client • The field is editable in Zoho (not greyed out)	• You need to correct an RM name, team member assignment, or role • Project or developer details are wrong or missing • Flat number, flat type, building number, or carpet area is incorrect • Client details (name, phone) need updating • Cross-sale status needs updating • The field appears greyed out or locked in Zoho

Remember: When in doubt: if a field is about what happened at the time of booking (project, flat, RM, client), update it in Homesfy CRM. If it is about what is happening post-booking (payments, invoices, AV negotiation, cancellation), update it in Zoho.

3. Field-by-field reference

The tables below cover every field the post-sales team interacts with. Fields are grouped by category.

3.1 Booking core details

Field	Update in	Direction	Guidance
Agreement Value (AV)	Zoho CRM	→ Homesfy CRM	Update in Zoho. Syncs back to Homesfy CRM automatically via reverse sync.
Passback amount	Zoho CRM	→ Homesfy CRM	Update in Zoho. Syncs back to Homesfy CRM.
Booking amount	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Set at time of booking in Homesfy CRM. Contact sales RM to correct.
Booking date	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Set at time of booking.
Flat number	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Raise with sales RM or Projects team to correct in Homesfy CRM.
Flat type / BHK	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Corrections to be made in Homesfy CRM by Projects team.
Building / Wing number	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. If blank, contact Projects or Operations team to populate in Homesfy CRM.
Carpet area	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Set by Projects team in Homesfy CRM.
Brokerage %	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho.

3.2 Invoice and payment fields

Note: Invoice and payment status fields (raised, partial, cleared) are updated in Zoho and sync to Homesfy CRM. The detailed ladder percentage tracking (invoice raised %, eligible %, payment received %) is managed entirely in Zoho and does not sync back.

Field	Update in	Direction	Guidance
Invoice raised status	Zoho CRM	→ Homesfy CRM	Update in Zoho when invoice is raised. Syncs back to Homesfy CRM.
Partial invoice raised	Zoho CRM	→ Homesfy CRM	Update in Zoho. Syncs back to Homesfy CRM.
Invoice not raised status	Zoho CRM	→ Homesfy CRM	Update in Zoho. Syncs back to Homesfy CRM.
Invoice cleared status	Zoho CRM	→ Homesfy	Update in Zoho when payment is

Field	Update in	Direction	Guidance
		CRM	received and invoice cleared.
Payment received status	Zoho CRM	→ Homesfy CRM	Update in Zoho. Syncs back to Homesfy CRM.
Invoice raised % (ladder)	Zoho only	Zoho only	Managed entirely in Zoho. Does not sync to Homesfy CRM.
Eligible invoice % (ladder)	Zoho only	Zoho only	Calculated in Zoho based on ladder scheme. Does not sync to Homesfy CRM.
Payment received % (ladder)	Zoho only	Zoho only	Managed entirely in Zoho. Does not sync to Homesfy CRM.
Base % per ladder	Zoho CRM	→ Homesfy CRM	Update in Zoho. Syncs back to Homesfy CRM.
Sales agreement status	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Managed by sales team in Homesfy CRM.

3.3 RM and team fields

Important: All RM and team name fields are read-only in Zoho. If any name is wrong, contact the relevant team lead to make the correction in Homesfy CRM — it will flow to Zoho automatically.

Field	Update in	Direction	Guidance
S1 (Sales RM) name	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. RM assignments are managed in Homesfy CRM only. Contact your team lead to update.
S1 employee ID	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Set in Homesfy CRM.
A1 name	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho.
RH name	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho.
CH name	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho.
Cross-sale A1 name	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Cross-sale team assignments managed in Homesfy CRM.

3.4 Project and developer fields

Important: If the developer or builder name is blank in Zoho, this means the project has no developer ID linked in Homesfy CRM. Escalate to the Project Data team — do not attempt to edit in Zoho.

Field	Update in	Direction	Guidance
Project name	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Managed by Projects Data team in Homesfy CRM.
Developer / Builder name	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. If blank, escalate to Projects Data team to link developer in Homesfy CRM.
Region (sales RM region)	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Derived from sales RM's region in Homesfy CRM.
Region (booked project region)	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Derived from the project's own region in Homesfy CRM.

3.5 Client fields

Field	Update in	Direction	Guidance
Client name	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho.
Client name as per developer	Zoho only	Zoho only	Managed in Zoho only. Used for invoice generation. Does not sync to Homesfy CRM.
Client phone number	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Set by sales team in Homesfy CRM.
Client email	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Note: some client emails in Homesfy CRM may be blank or invalid — this is a known data quality issue.

3.6 Booking status fields

Field	Update in	Direction	Guidance
Booking cancellation status	Zoho CRM	→ Homesfy CRM	Update in Zoho when a booking is cancelled. Syncs back to Homesfy CRM.
Cross-sale status	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Managed by sales team in Homesfy CRM.
Booking status (active / cancelled)	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Set in Homesfy CRM.

3.7 Magnet booking fields

Important: For 100% Magnet bookings, Priya or another post-sales team member must vet the data in Homesfy CRM before it is pushed to Zoho. Until the vetting workflow is live, these bookings will not appear in Zoho automatically — they will be pushed manually.

Field	Update in	Direction	Guidance
Magnet name / ID	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. Set at time of booking in Homesfy CRM.
Magnet retention amount (magnet %)	Homesfy CRM	Homesfy → Zoho	Homesfy stores the raw Magnet Share value. Zoho displays the Retention Amount (100% minus Magnet Share). Read-only in Zoho.
RM name (80% magnet booking)	Homesfy CRM	Homesfy → Zoho	Read-only in Zoho. For 80% Magnet bookings, the Post-Sales Magnet RM/TL name is sent from Homesfy CRM.

3.8 Zoho-only fields (no sync)

The following fields exist only in Zoho and have no equivalent in Homesfy CRM. They never sync in either direction.

Field	Update in	Direction	Guidance
Ladder scheme	Zoho only	Zoho only	Assigned in Zoho by the post-sales team. Does not exist in Homesfy CRM.
Notes / comments	Zoho only	Zoho only	Internal notes entered in Zoho. Not synced to Homesfy CRM.
Callbacks and follow-ups	Zoho only	Zoho only	Tracked in Zoho only. Not synced to Homesfy CRM.
Invoice details (line items, amounts)	Zoho only	Zoho only	Full invoice management is in Zoho only. Not synced to Homesfy CRM.
Payment tracking details	Zoho only	Zoho only	Detailed payment records managed in Zoho only. Not synced to Homesfy CRM.
Client name as per developer	Zoho only	Zoho only	Used for invoice generation in Zoho. Not synced to Homesfy CRM.

4. Common scenarios — what to do

The AV for a booking has been renegotiated

- Open the booking record in Zoho CRM.
- Update the Agreement Value (AV) field in Zoho.
- Save. The new AV will sync automatically to Homesfy CRM.
- You do not need to open Homesfy CRM for this change.

An invoice has been raised

- Open the booking record in Zoho CRM.
- Update 'Invoice raised status' to true / yes in Zoho.
- Also update the relevant ladder percentage fields (Invoice raised %, Eligible invoice %) in Zoho.
- Save. The status fields sync to Homesfy CRM; the percentage fields stay in Zoho only.

A booking has been cancelled

- Open the booking record in Zoho CRM.
- Update the 'Booking cancellation status' field in Zoho.
- Save. This syncs back to Homesfy CRM automatically.

Never: Do not delete the record in Zoho — mark it as cancelled using the status field.

The wrong RM name is showing in Zoho

- Do not attempt to edit the RM name in Zoho — the field is read-only.
- Contact the relevant team lead or Homesfy Tech support to correct the RM assignment in Homesfy CRM.
- Once corrected in Homesfy CRM, the updated name will flow to Zoho automatically.

Project or developer details are blank or wrong in Zoho

- Do not attempt to edit project fields in Zoho — they are read-only.
- If the developer name is blank, escalate to the Project Data team. They will link the developer to the project in Homesfy CRM.
- Once updated in Homesfy CRM, the data will flow to Zoho automatically.

A 100% Magnet booking is not showing in Zoho

- 100% Magnet bookings are not pushed to Zoho automatically until the vetting process is live.
- Contact Priya to vet the booking data in Homesfy CRM.
- After vetting, the booking will be pushed to Zoho manually by the tech team.

Flat type is showing as '1.0' or '2.0' instead of '1BHK' or '2BHK'

- This is a known data issue being fixed in Homesfy CRM by the tech team.
- Do not attempt to edit in Zoho — it will be overwritten by the next sync.
- Raise with Homesfy Tech if the issue persists after the fix is deployed.

You need to add notes or follow-up tasks for a booking

- All notes, callbacks, and follow-ups are managed entirely in Zoho CRM.
- There is no need to update Homesfy CRM for these — they are Zoho-only.

5. Who to contact for corrections

If the issue is...	Contact	What to provide
RM name / team assignment is wrong	Team Lead / Homesfy Tech	Lead ID, correct RM name and employee ID
Developer / builder name is blank	Project Data team	Lead ID, project name, correct developer name
Flat number, flat type, or building number is wrong	Projects team / Operations team	Lead ID, booking ID, correct value
Project or region details are incorrect	Project Data team	Lead ID, project name, correct region
Client name or phone number is wrong	Sales RM	Lead ID, correct client details
A 100% Magnet booking is not in Zoho	Priya (post-sales) → Homesfy Tech	Lead ID, booking ID
Any field is not syncing from Zoho to Homesfy CRM	Homesfy Tech (Rohan / Sandeep)	Lead ID, field name, value you updated, screenshot if possible
Any field is not syncing from Homesfy to Zoho	Homesfy Tech (Rohan / Sandeep)	Lead ID, field name, expected value

Remember: Always provide the Lead ID and Booking ID when reporting an issue — this is the fastest way for the tech team to trace what happened in the integration logs.

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