

# Vtiger CRM

Thank you for purchasing my extension. If you have any questions that are beyond the scope of this help file, please feel free to email via my user page contact form here. Thanks so much!

Created: 16/01/2017 | By: Magenest | Support Portal:<http://servicedesk.izysync.com/servicedesk/customer/portal/105>

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## Introduction

**Woocommerce Vtiger CRM Integration** synchronizes data automatically between your Woocommerce site and Vtiger CRM.

**Extension's page:** [Vtiger CRM Integration](#)

### Features

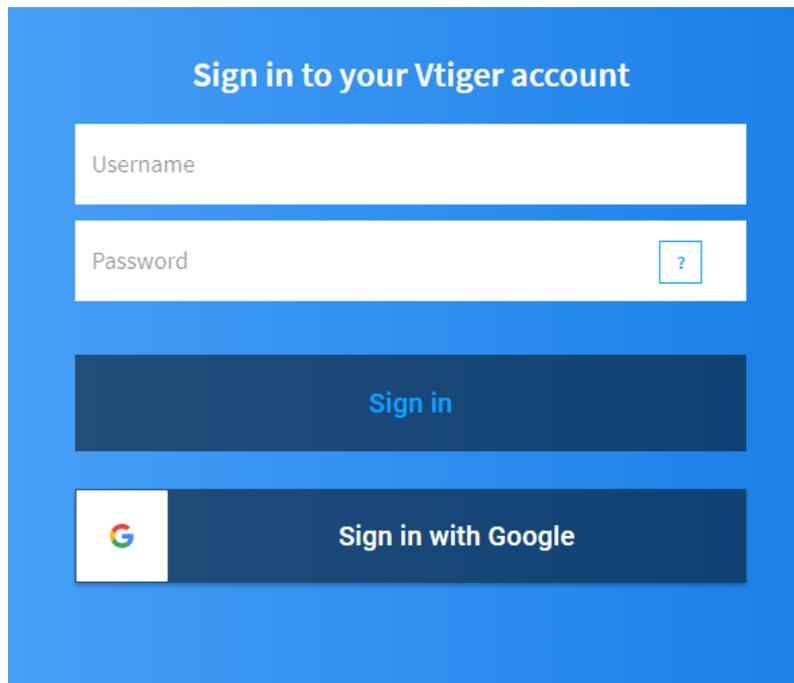
- Allows synchronizing and updating Customers from Magento 2 store to Vtiger CRM Leads, Organizations, Contacts.
- Allows synchronizing Orders from Magento 2 store to Vtiger CRM Sales Orders.
- Allows synchronizing Invoices from Magento 2 store to Vtiger CRM Invoices.
- Allows synchronizing and updating Products from Magento 2 store to Vtiger CRM Products.
- Allows admins define the mapping fields in backend with ease.
- Mapping manually between Magento 2 attributes and Vtiger CRM custom fields.
- 2 synchronize modes: Auto or Manual.
- Report Sync data between Woocommerce and Salesforce.A

## Configuration

### Set up Vtiger account

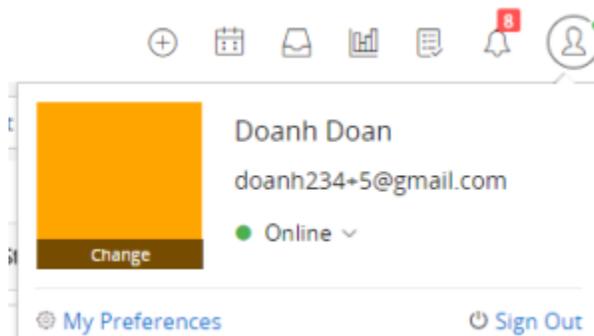
Go to <https://www.vtiger.com/log-in/> to log in ( if you had an existing Vtiger account) or register new one.





## Getting Vtiger Access Key

Access your Vtiger account and click on your profile name on the top right corner, then go to **My Preferences**

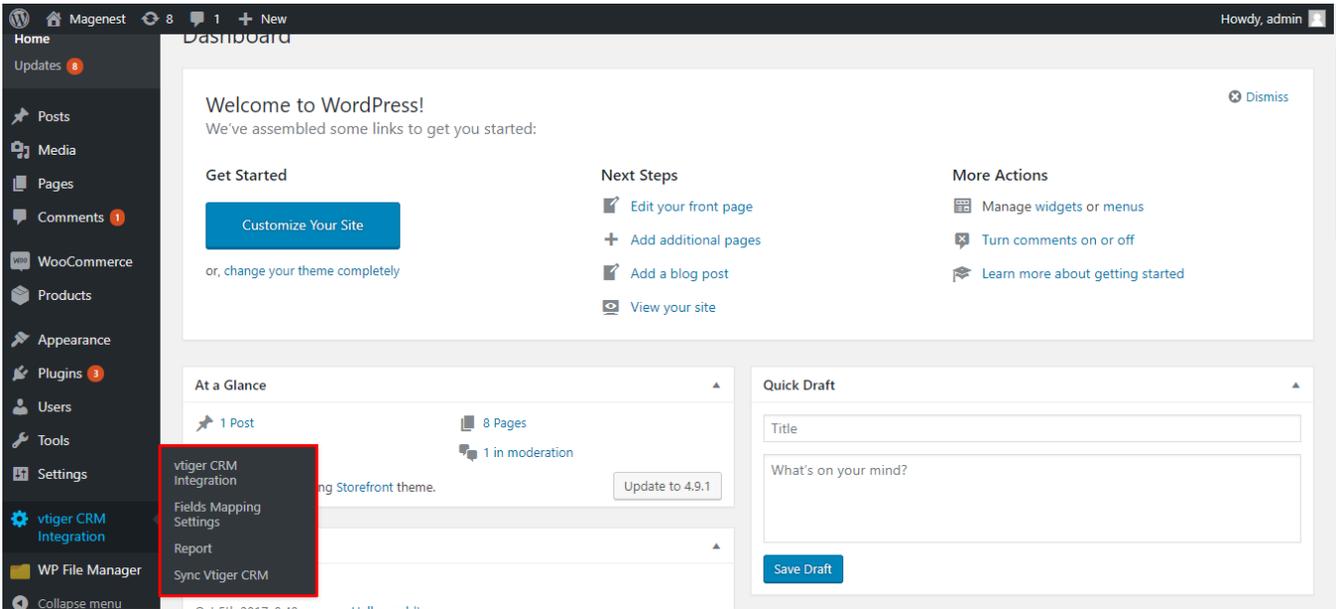


Scroll to bottom of the page, you can see the Access Key in **User information**

### User information

Username	doanh234+5@gmail.com	Access Key	2mBxluY1EAONfc
Language	US English	Reports To	
Role	CEO	Primary Group	
Is Admin	Yes		

Go to the Vtiger CRM tab, then the Vtiger CRM menu will be shown.



### + Configuration in Woocommerce

To start using the extension, admins need to set some configurations by navigating to **WooCommerce > Settings > VtigerCMR integration**

Expand the **VtigerCRM Information** section, there are three fields will be shown.

➖ **Username:** Your Vtiger username.

➖ **URL:** Please follow the format of your\_vtiger\_site/webservice.php

➖ **Access Key:** Used the access key which saved in the previous step to enter this field.

ℹ - After that, you need select option Module sync (Orders in Woocommerce into Contact of vtiger CRM, to Vtiger and Sync mode: Auto (Auto Sync Vtiger) or Manual (Add to Queue)

**+ Config field mapping**

➔ Go to **Vtiger CRM Integration > Fields Mapping**

ID	WooCommer fields	Vtiger fields	Type	Status	Action
3	order_id	subject	invoice	on	<a href="#">Edit</a>   <a href="#">Delete</a>
6	name	productname	product	on	<a href="#">Edit</a>   <a href="#">Delete</a>
8	billing_email	email	customer	on	<a href="#">Edit</a>   <a href="#">Delete</a>
10	billing_email	invoicedate	invoice	on	<a href="#">Edit</a>   <a href="#">Delete</a>
11	billing_first_name	lastname	customer	on	<a href="#">Edit</a>   <a href="#">Delete</a>
12	stock_quantity	qtyinstock	product	on	<a href="#">Edit</a>   <a href="#">Delete</a>
13	regular_price	unit_price	product	on	<a href="#">Edit</a>   <a href="#">Delete</a>
14	status	invoicestatus	invoice	on	<a href="#">Edit</a>   <a href="#">Delete</a>

➔ You can add new field by click button **Add new**

All fields mapping sync to Vtiger

Show 10 entries Search:

ID	WooCommer fields	Vtiger fields	Type	Status	Action
3	order_id	subject	invoice	on	<a href="#">Edit</a>   <a href="#">Delete</a>
6	name	productname	product	on	<a href="#">Edit</a>   <a href="#">Delete</a>
8	billing_email	email	customer	on	<a href="#">Edit</a>   <a href="#">Delete</a>
10	billing_email	invoicedate	invoice	on	<a href="#">Edit</a>   <a href="#">Delete</a>
11	billing_first_name	lastname	customer	on	<a href="#">Edit</a>   <a href="#">Delete</a>
12	stock_quantity	qtyinstock	product	on	<a href="#">Edit</a>   <a href="#">Delete</a>
13	regular_price	unit_price	product	on	<a href="#">Edit</a>   <a href="#">Delete</a>
14	status	invoicestatus	invoice	on	<a href="#">Edit</a>   <a href="#">Delete</a>

Showing 1 to 14 of 8 entries Previous **1** Next

[Add new](#)

### Edit Fields Mapping

Type:

Woocommerce field:

Vtiger field:

Status:

[Add new](#)

- **Type** : Customer, Leads, Products, invoices, sales order
- **Woocommerce field**: select Magento data field from dropdown list which you want to synchronize.
- **Vtiger field**: select Vtiger field from dropdown list which you want to store data in.
- **Status**: select Enabled/Disabled.

Remember to click **Add new** to store information

**Notice:** Please attention many mandatory field in Vtiger you must add

**Sync to Vtiger**

1. If you config Sync mode is Automatically

- Register User to Lead: When a new customer register account, it will sync into Module lead.
- Orders in Woocommerce into Contact of vtiger CRM: When have new order, billing information or shipping information will sync into Vtiger.

- Orders in Woocommerce into Invoice of vtiger CRM: When have new order, cart information will sync into Vtiger.
- Product in Woocommerce into product of vtiger CRM: When createnew product, many field will sync into Vtiger.

2. If you config Sync mode is Manually

Your task will be added to the queue:

Equeue customer sync Vtiger

User id	User	Email	Order date	Sync
368	frank nguyen	vuongdung2611@gmail.com	2018-01-08 13:32:13	<span style="border: 2px solid red; padding: 2px;">SYNC</span>

Equeue lead sync Vtiger

User id	User	Email	Order date	Sync

Equeue Product sync Vtiger

Product id	Name	Create date	Sync

Equeue Order sync to Invoice Vtiger

Order id	Billing name	Billing mail	Order detail	Create date	Sync

**+ Report**

You can see all synchronized records.

- **Click Vtiger CRM Integration > Report**

All Item was sync to Vtiger

Show 10 entries Search:

ID	Woocommerce ID	vtigerCRM ID	Type	Created time
1	358	4x262	Customers	04 Jan, 2018 03:36 PM
2	358	16x263	Invoices	04 Jan, 2018 03:36 PM
3	359	6x266	Products	04 Jan, 2018 03:40 PM
4	360	6x265	Products	05 Jan, 2018 12:46 PM
5	362	6x264	Products	05 Jan, 2018 12:58 PM
6	363	4x267	Customers	05 Jan, 2018 02:54 PM
7	363	16x268	Invoices	05 Jan, 2018 02:54 PM
8	364	4x269	Customers	05 Jan, 2018 03:38 PM
9	364	16x270	Invoices	05 Jan, 2018 03:38 PM
10	365	6x273	Products	08 Jan, 2018 12:32 PM

Showing 1 to 10 of 15 entries Previous 1 2 Next

**+ Main Functions**

**When a customer adds items to cart then check out, Sales Orders in Vtiger will be auto synced.**

# Orders

ORDER	DATE	STATUS	TOTAL	ACTIONS
#369	January 8, 2018	On hold	\$4.00 for 1 item	<a href="#">View</a>
#368	January 8, 2018	On hold	\$12.00 for 1 item	<a href="#">View</a>
#364	January 5, 2018	On hold	\$12.00 for 1 item	<a href="#">View</a>
#363	January 5, 2018	On hold	\$4.00 for 1 item	<a href="#">View</a>
#358	January 4, 2018	On hold	\$0.50 for 1 item	<a href="#">View</a>
#357	January 4, 2018	Pending payment	\$0.50 for 1 item	<a href="#">Pay</a> <a href="#">View</a> <a href="#">Cancel</a>

**vtiger** | Type to search | 4 days left in free trial - Click to subscribe

**INVENTORY** | My Invoices | + Add Invoice | Import | Customize | Help

Subject	Organization Name	Contact Name	Assigned To	Status	Sales Order
Woocommerce ID #369		Doanh Doan	Doanh Doan	pending	
Woocommerce ID #368		Doanh Doan	Doanh Doan	Woocommerce ID #368	
Woocommerce ID #364		Doanh Doan	Doanh Doan	Woocommerce ID #364	
Woocommerce ID #363		Doanh Doan	Doanh Doan		
Magenest		Doanh Doan	Doanh Doan		
Woocommerce ID #292		Doanh Doan	Doanh Doan	pending	
Woocommerce ID #289		Doanh Doan	Doanh Doan	on-hold	
Woocommerce ID #290		Doanh Doan	Doanh Doan	on-hold	

When admin add a new product , Vtiger will auto sync data about that product.

**Products** | Add New | Import | Export

All (44) | Published (42) | Drafts (2) | Trash (11) | Sorting

44 items | 1 of 3

Name	SKU	Stock	Price	Categories	Tags	Date
product1	-	In stock	\$123.00	Posters	-	Published 2018/01/08 12:46:17 pm
test13	-	In stock	\$12.00	-	-	Published 2018/01/08 12:35:41 pm
óc	oc	In stock	\$12.00	Clothing	-	Published 2018/01/08 12:32:49 pm
test12	SKU	In stock	\$120.00	Music	-	Published 2018/01/05 12:58:42 pm
é — Draft	-	In stock	-	-	-	Last Modified 2018/01/05 12:52:43 pm
testhvac	-	In stock	\$100.00	Music	-	Published

Product Name	Part Number	Commission Rate	Qty. in Stock	Qty/Unit	Unit Price
<a href="#">New product</a>					\$99
<a href="#">product1</a>					\$123
<a href="#">test13</a>					\$0
<a href="#">óc</a>					\$0
<a href="#">test Vt</a>					\$0
<a href="#">testbyoc</a>					\$0
<a href="#">test12</a>					\$0
<a href="#">test 1</a>					\$0
<a href="#">Test 1</a>					\$99
<a href="#">HTC Desire SV</a>	876872622	9	1,000	1	\$600

## Update

- When a bug fix or new feature is released, we will provide you with the module's new package.
- All you need to do is repeating the above installing steps and uploading the package onto your store. The code will automatically override.
- Flush the config cache. Your store and newly installed module should be working as expected.

## Support

- We will reply to support requests after **2 business days**.
- We will offer **lifetime free update and 6 months free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
- Support **DOES NOT** include other series such as customizing our products, installation and uninstallation service.

Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.

**Magenest**