2. Vtiger Integration User Guides

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Introduction to Magento VtigerCRM Integration Extension

Magento VtigerCRM Integration Extension is a powerful tool that provides automatic data synchronizing solution from your Magento sites to your Vtiger CRM.

Features

- The module supports the following synchronizations:

- Customer accounts in Magento to Leads, Contacts and Organizations in Vtiger.
- Subscriptions in Magento to Leads in Vtiger.
- Orders in Magento to Sales Orders in Vtiger.
- Invoices in Magento to Invoices in Vtiger.
- Promotions in Magento to Campaigns in Vtiger.
- Products in Magento to Products in Vtiger.

- Allows updating and deleting automatically customers and products from Magento store into Vtiger

- Allows admins define the mapping fields in backend with ease

System Requirement

Your store should be running Magento Community Edition version 1.8.x or 1.9.x

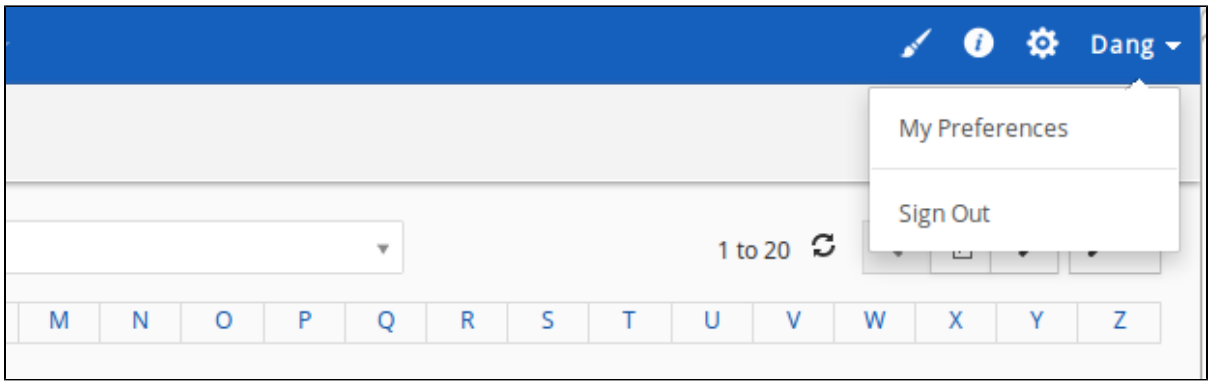
Video Tutorial Playlist

(Go to playlist link to view more: **https://www.youtube.com/playlist?list=PLOgckfH7zlZs60zPwcuv7tUQ0UVZpRxeH**)

Configuration

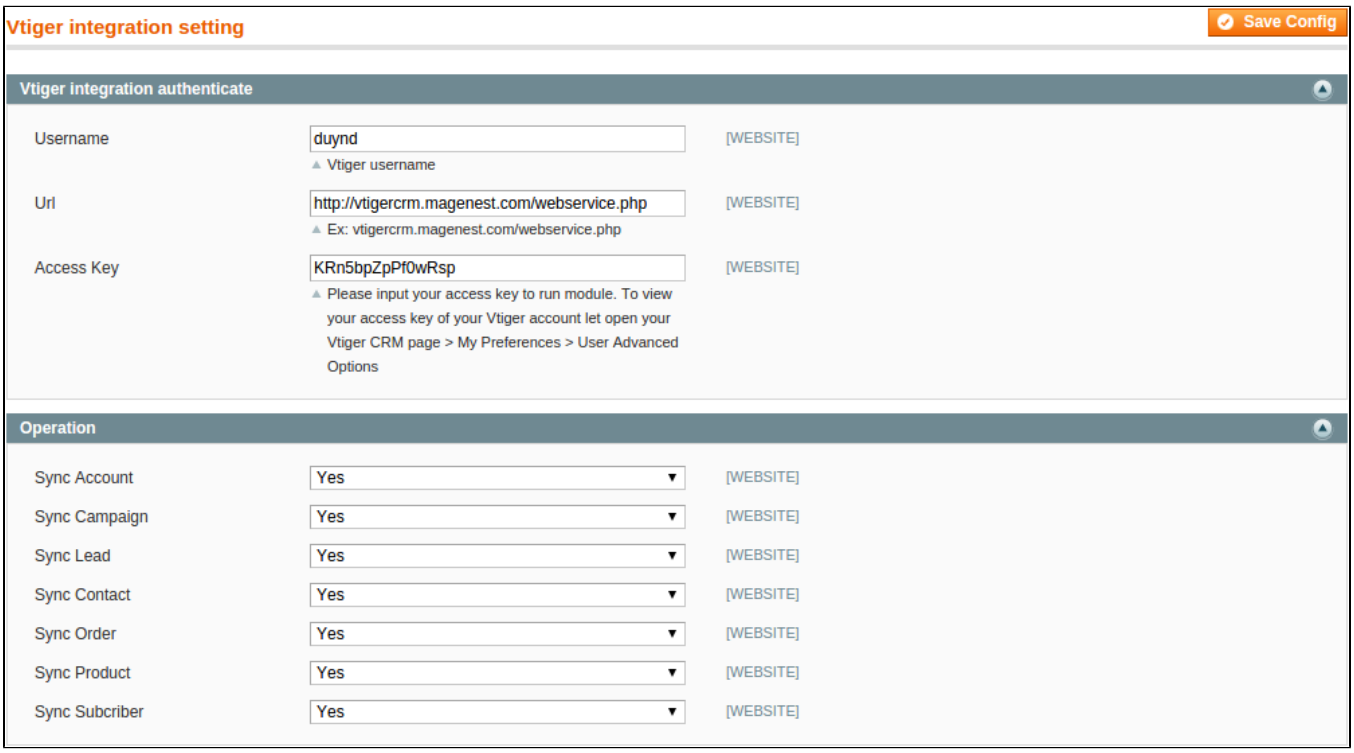
Getting Vtiger Access Key

- In your VtigerCRM site, click on your profile name on the top right corner and go to **My Preferences**



- Scroll to bottom of the page, you can see the Access Key in **User Advanced Options**

Filling in information



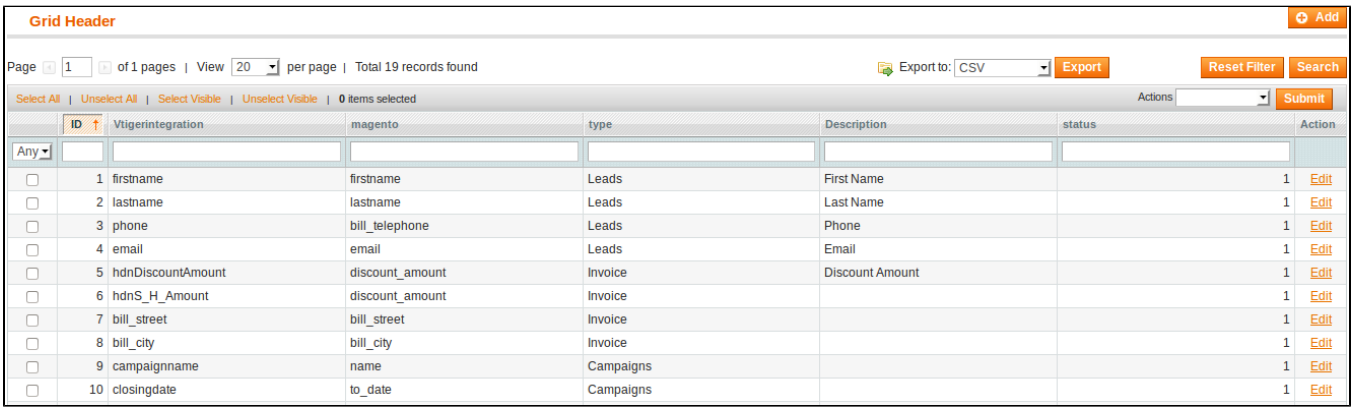
- **Username**: your Vtiger username
- **Url**: has the format of your_vtiger_site/webservice.php
- **Access Key**: Fill in your access key
- Turn on sync operations of your choice

When done, hit **Save Config**, your configuration is ready to use.

Data Integration Settings

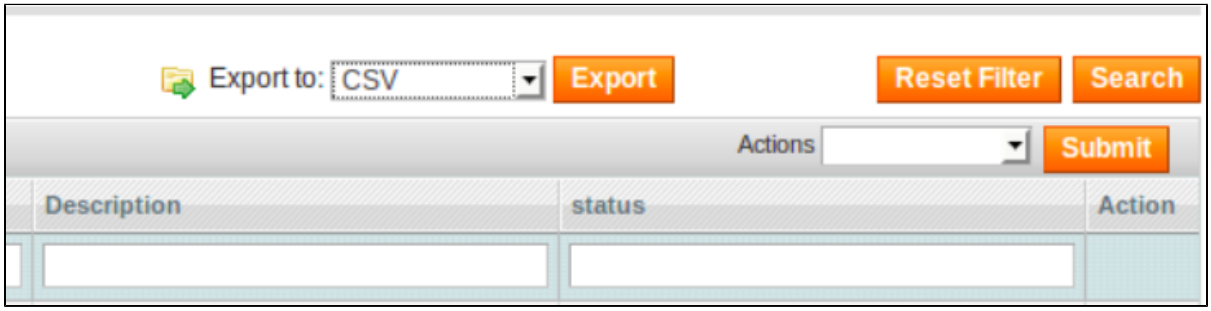
You can define field mappings between Magento and VtigerCRM easily.

- Click on **VtigerIntegration > Field Mapping**.

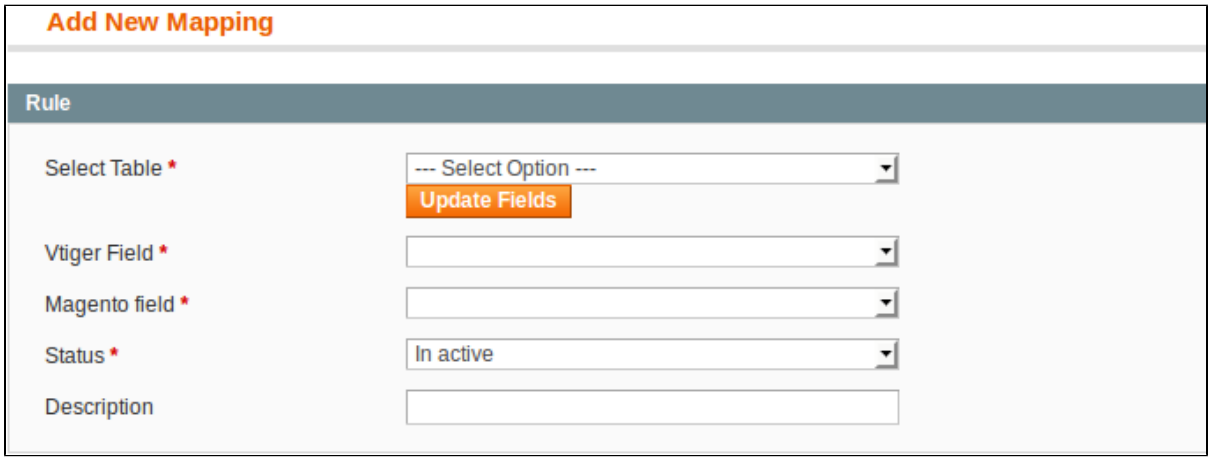


	ID	Vtigerintegration	magento	type	Description	status	Action
Any							
	1	firstname	firstname	Leads	First Name	1	Edit
	2	lastname	lastname	Leads	Last Name	1	Edit
	3	phone	bill_telephone	Leads	Phone	1	Edit
	4	email	email	Leads	Email	1	Edit
	5	hdnDiscountAmount	discount_amount	Invoice	Discount Amount	1	Edit
	6	hdnS_H_Amount	discount_amount	Invoice		1	Edit
	7	bill_street	bill_street	Invoice		1	Edit
	8	bill_city	bill_city	Invoice		1	Edit
	9	campaignname	name	Campaigns		1	Edit
	10	closingdate	to_date	Campaigns		1	Edit

- You can choose which format to export your mapping as(CSV or Exel), change fields' status or delete fields



- To add a new mapping, click on **Add** button, **Add New Mapping** page will show up



- **Select Table**: Choose table you want to map
- **Vtiger Field**: Choose Vtiger Field
- **Magento Field**: Choose corresponding Magento Field

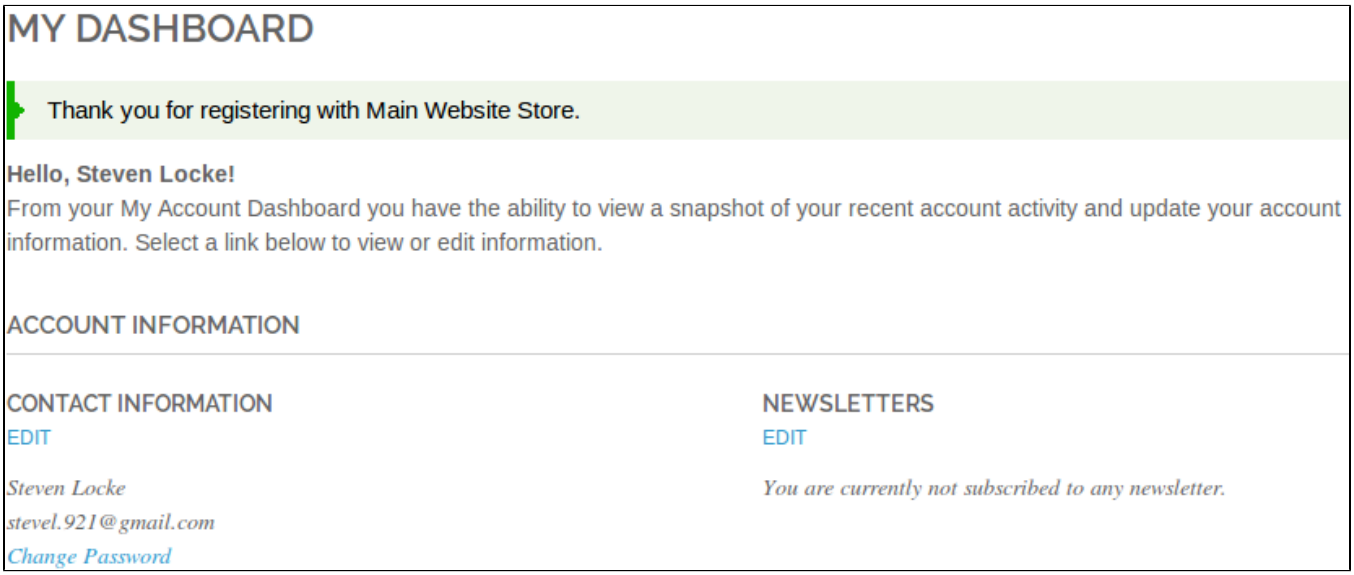
- **Status**: Inactive or active
- **Description**: Describe your mapping

Hit **Save** when done, your mapping is ready for the next sync.

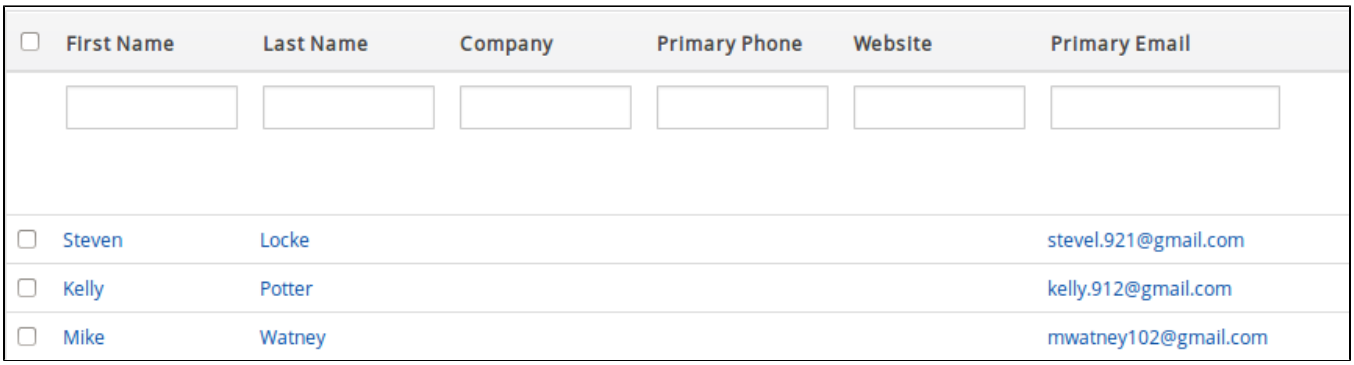
Main Functions

When a new customer register an account, a new record will be added into Vtiger's Leads

- When a new account is registered



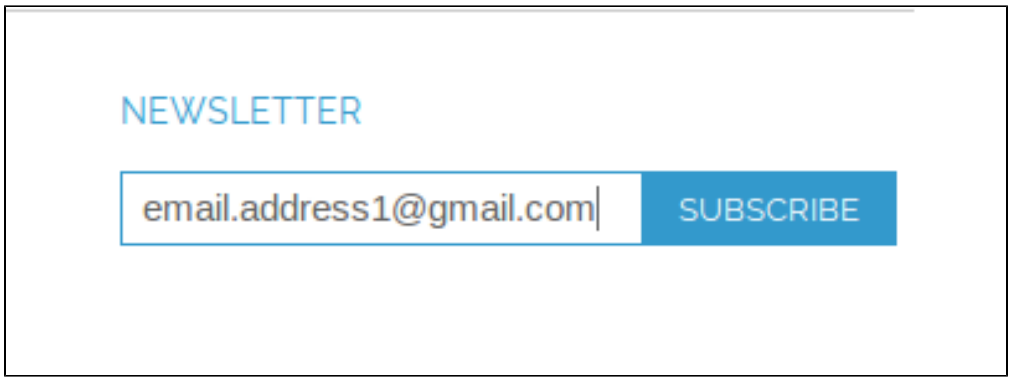
- In Vtiger's **Leads**



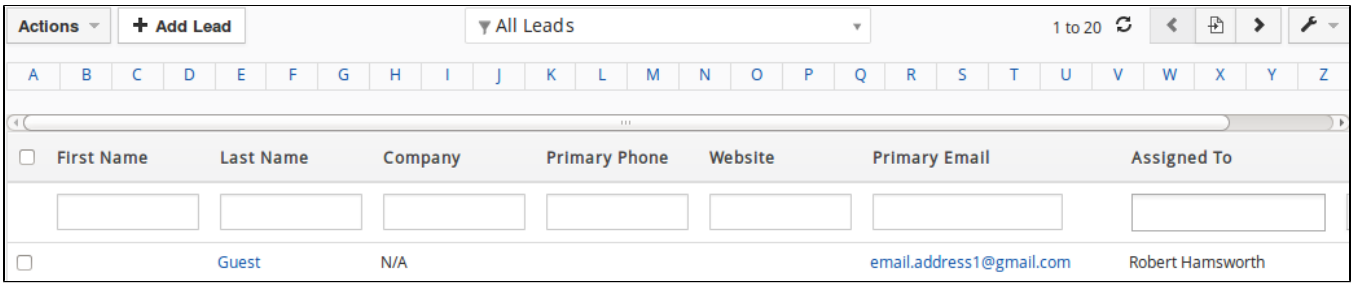
First Name	Last Name	Company	Primary Phone	Website	Primary Email
Steven	Locke				stevel.921@gmail.com
Kelly	Potter				kelly.912@gmail.com
Mike	Watney				mwatney102@gmail.com

When a guest subscribe for newsletter, a record is also added in Vtiger's Leads

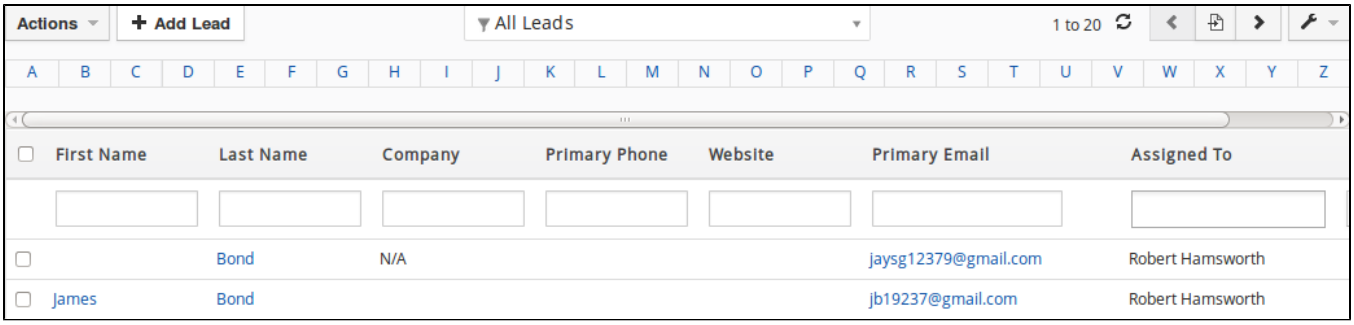
- Newsletter subscription with email **email.address1@gmail.com**



- In Vtiger's **Leads**

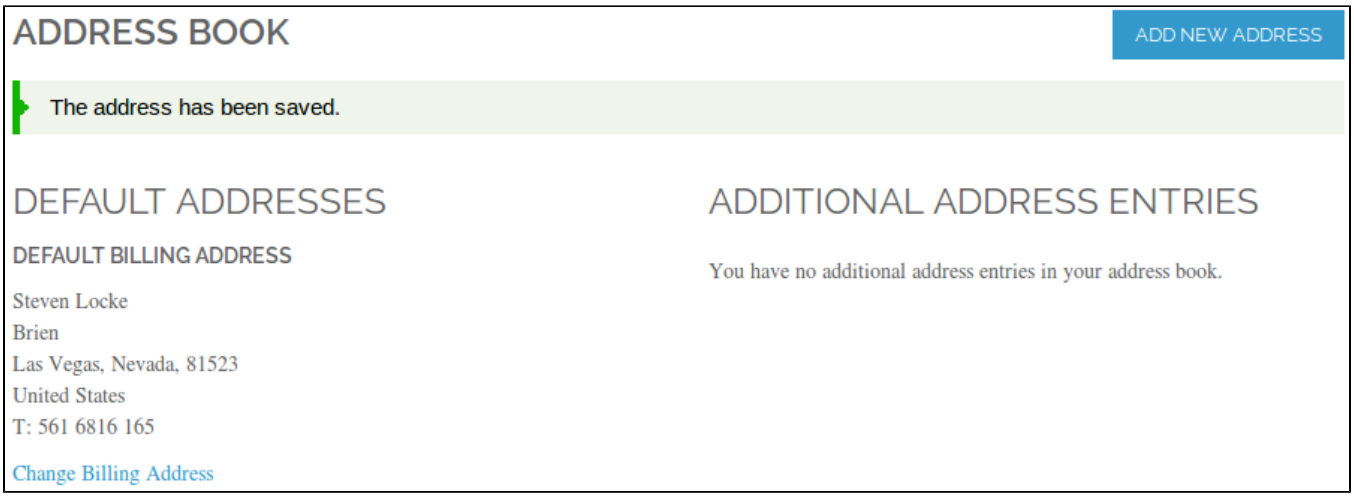


When a customer subscribe for newsletter, a record is added in Vtiger's Leads

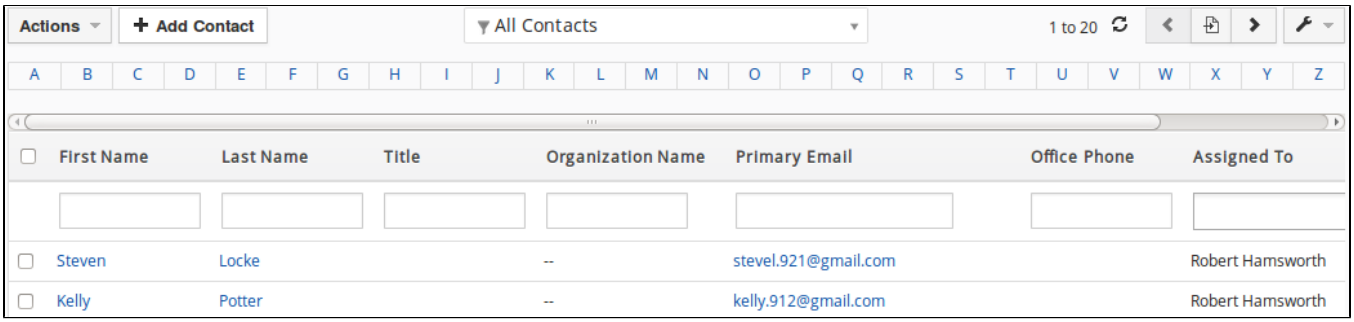


When a customer edits his account's info, a new record will be added in to Vtiger's Contacts and Organizations

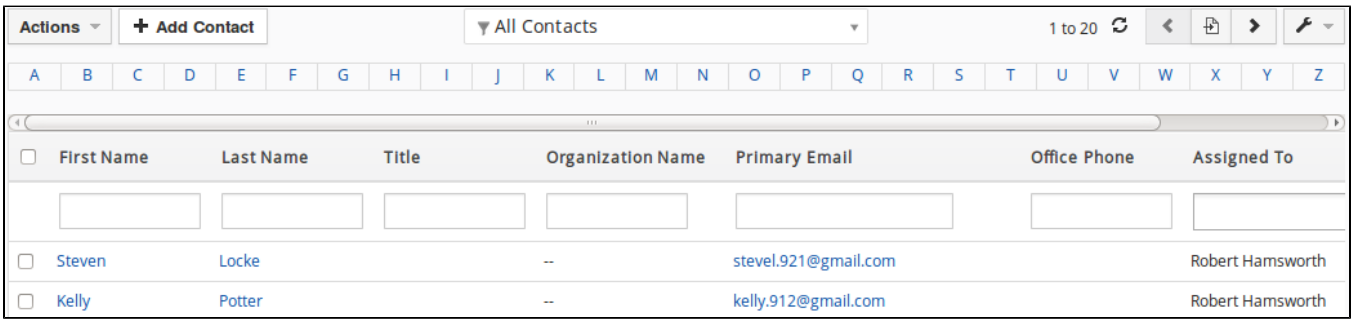
- When a customer successfully edited his profile



- In Vtiger's **Contacts**

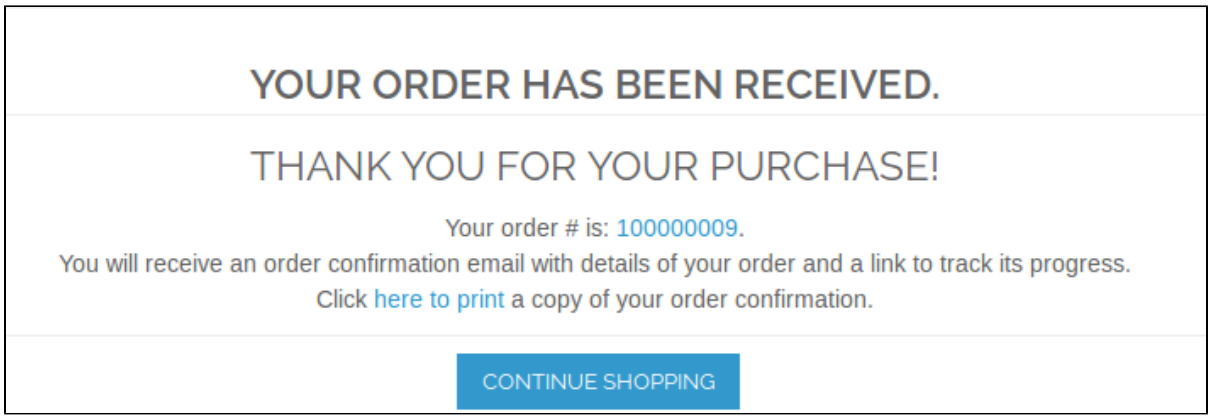


- In Vtiger's **Organizations**

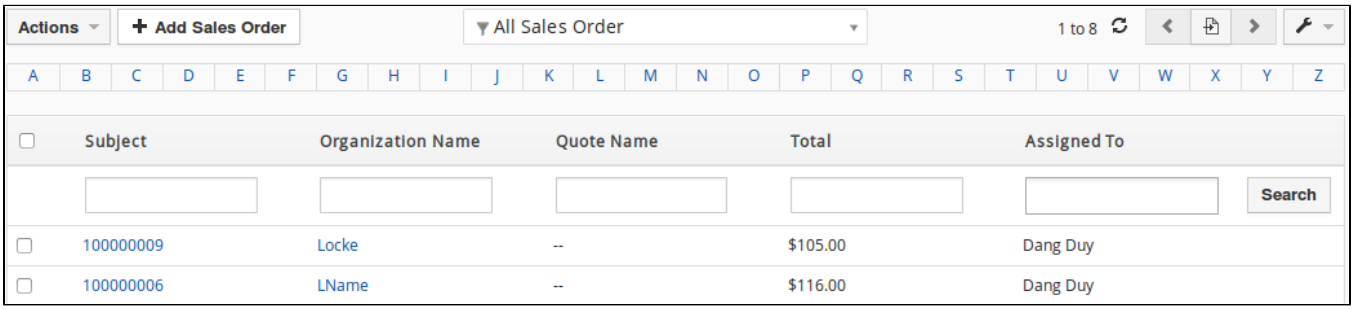


When a customer places an order, a new record will be added into Vtiger's Sales Orders

- When order **#100000009** is successfully placed

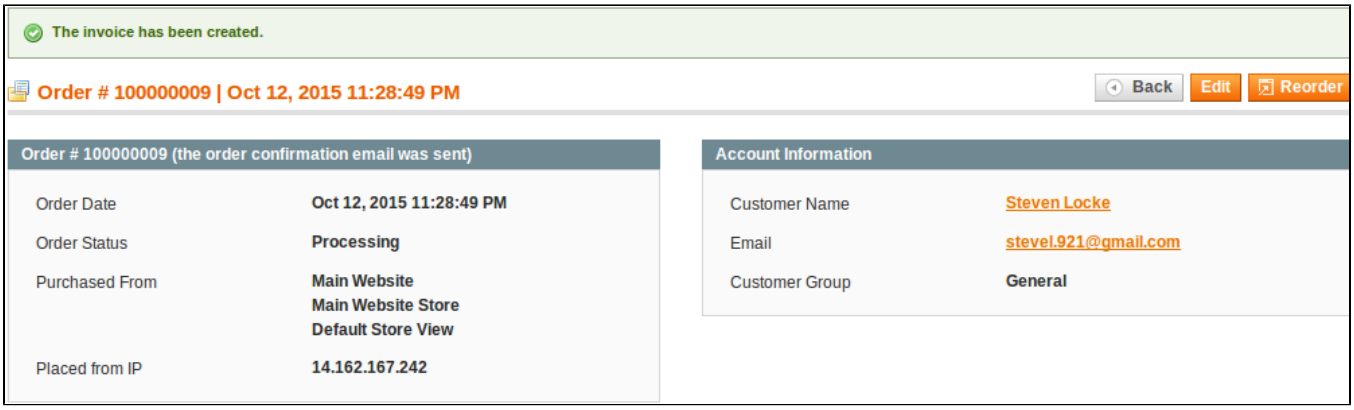


- In Vtiger's **Sales Orders**

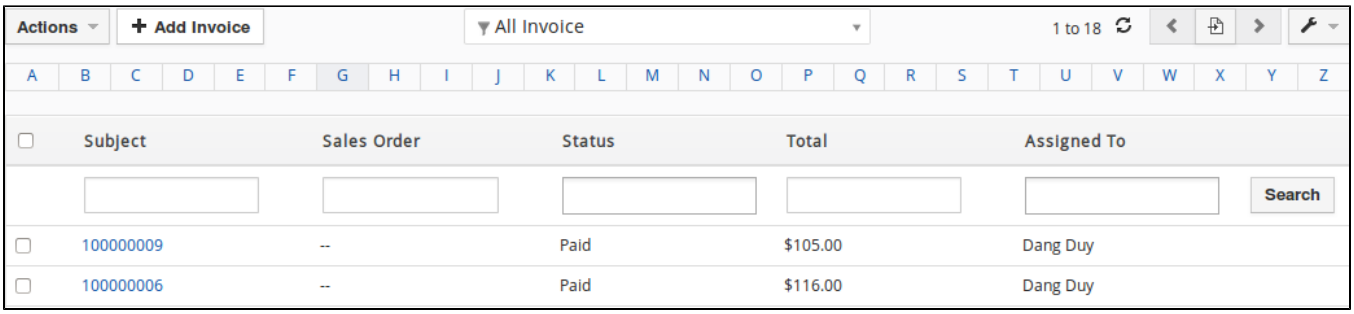


When store owner submits an invoice, a new record will be added into Vtiger's Invoice

- When invoice for order **#100000009** is successfully submitted

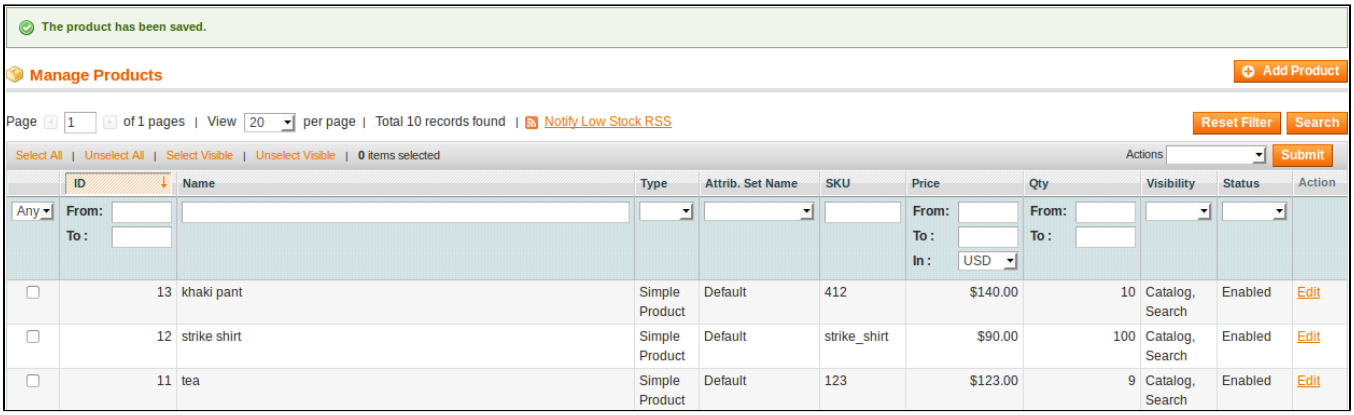


- In Vtiger's **Invoice**

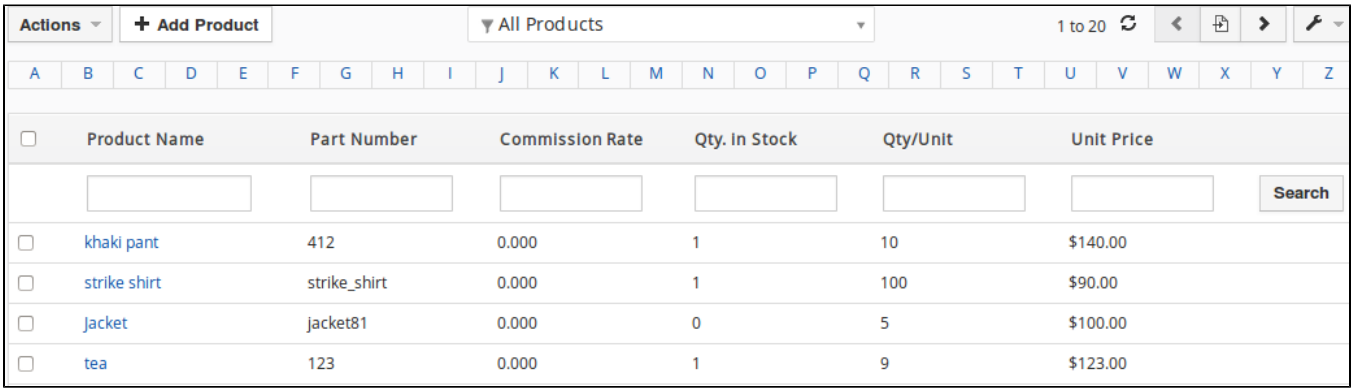


When store owner adds a new product or edits an existing one, a record of that product will be added or edited in Vtiger

- When a new product is saved

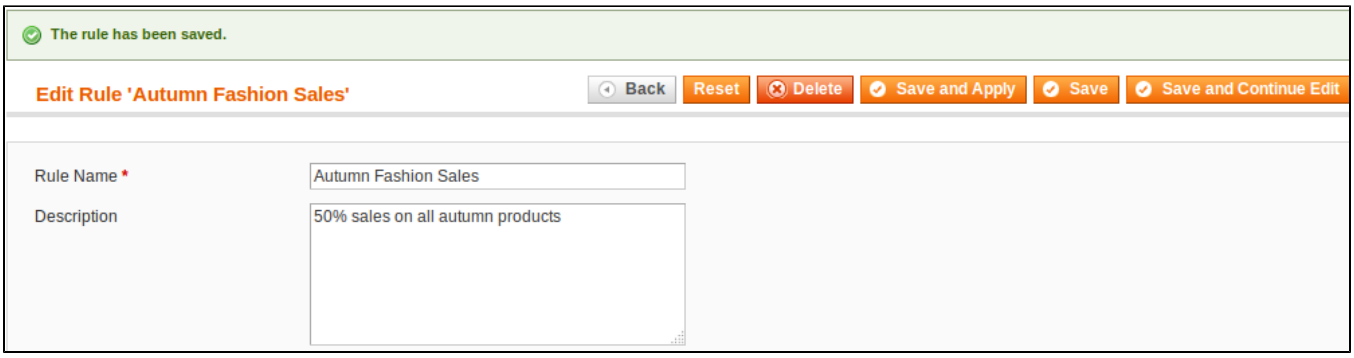


- In Vtiger's **Products**

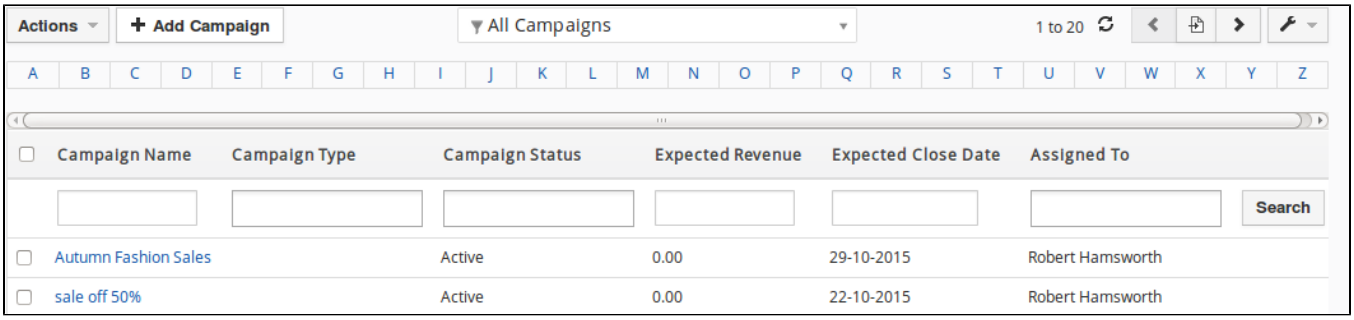


When store owner launches a new promotion or edit an existing one, a record will be added or edited in Vtiger's Campaign

- When a new promotion is launched

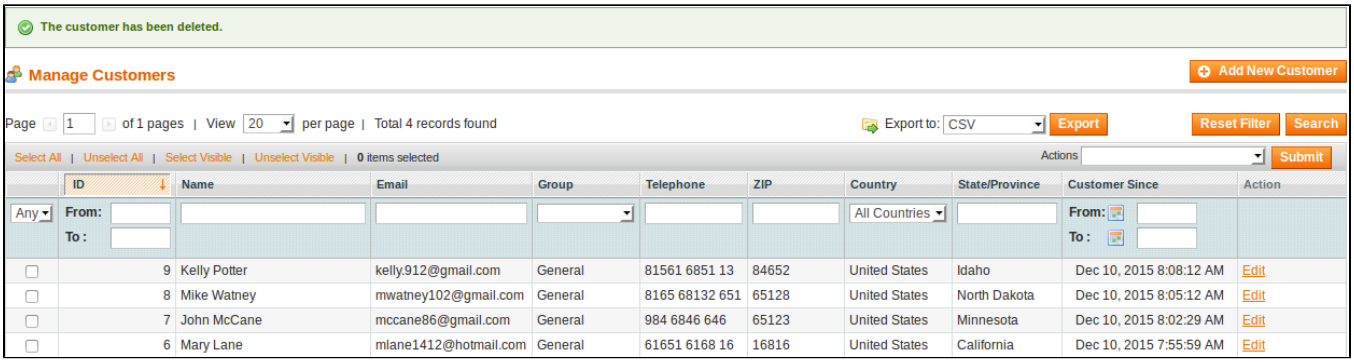


- In Vtiger's **Campaigns**

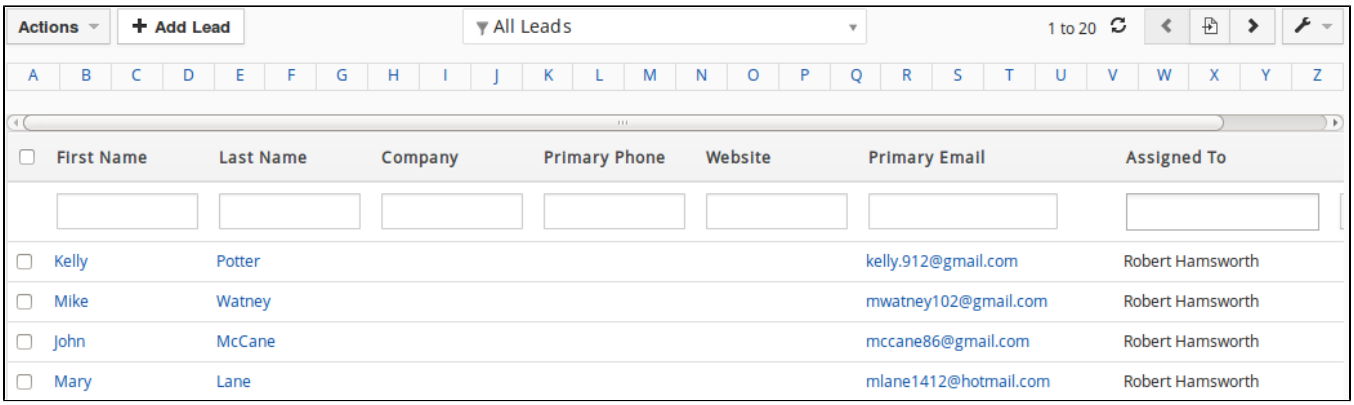


When store owner deletes a customer in Magento, the record will also be wiped from Vtiger's Leads, Contacts and Organizations

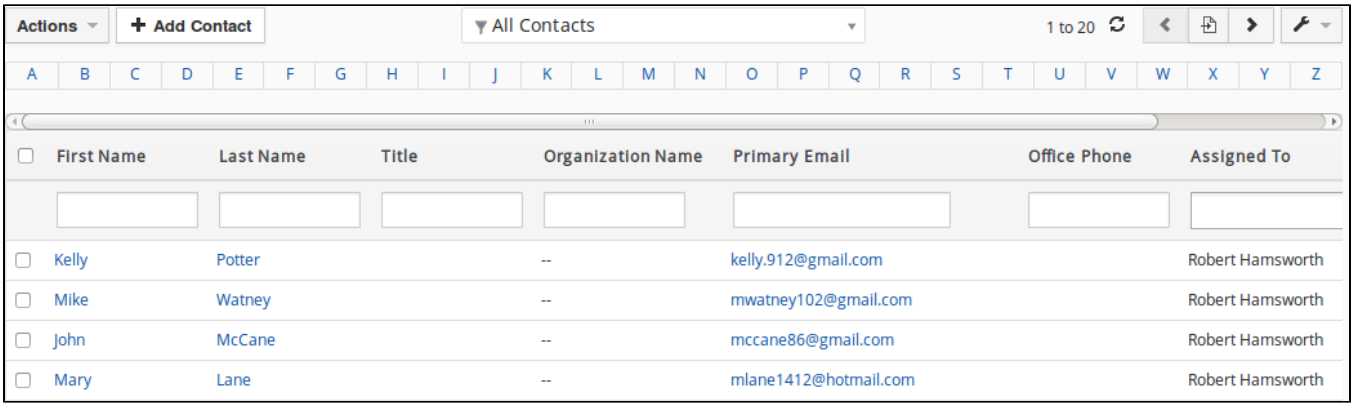
- Account **Steven Locke** is deleted



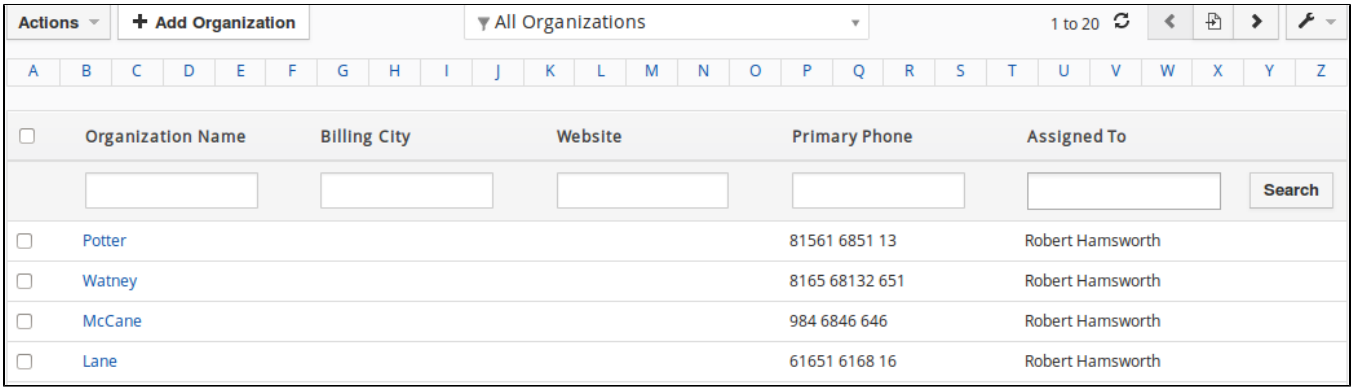
- In Vtiger's **Leads**



- In Vtiger's **Contacts**

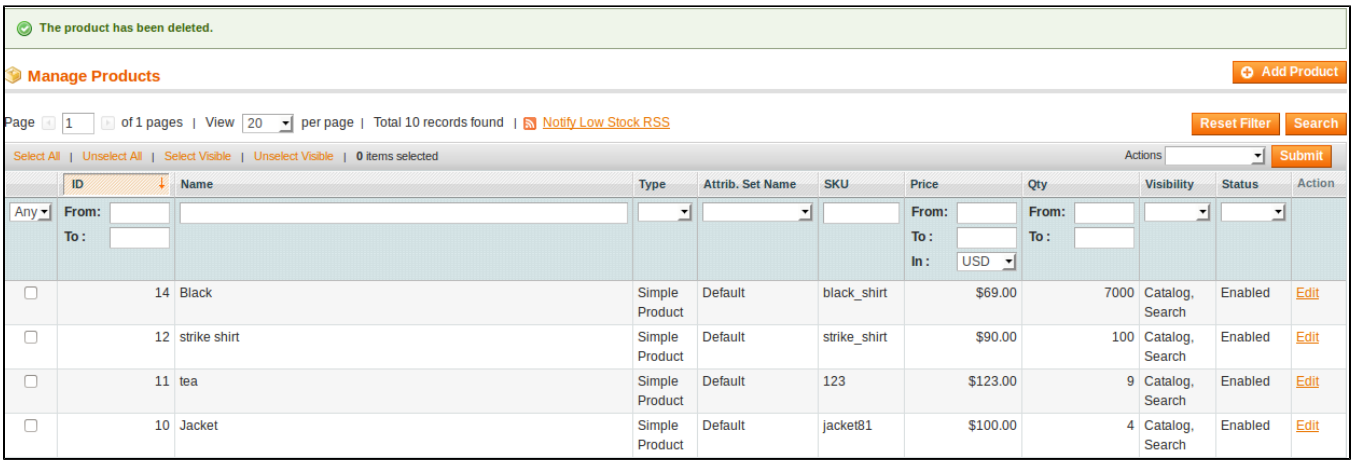


- In Vtiger's **Organizations**

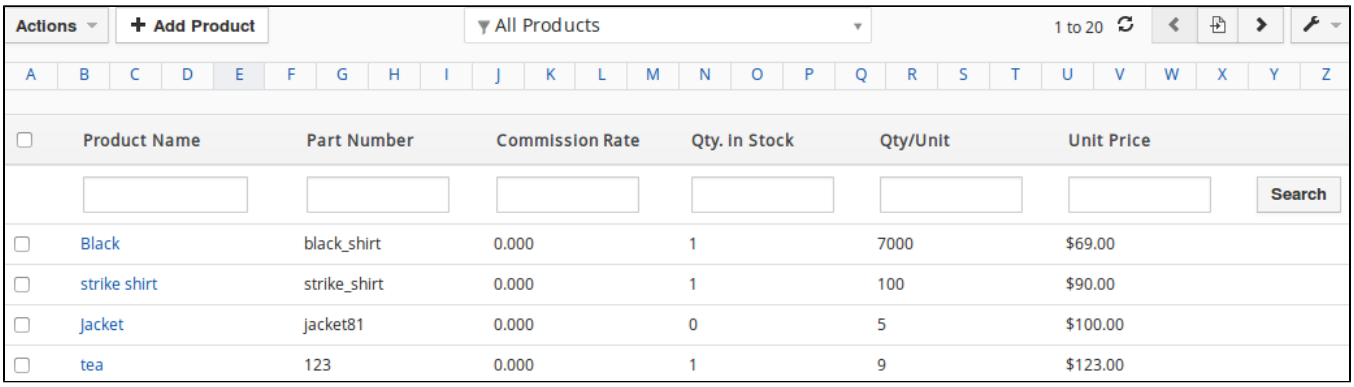


When store owner deletes a product in Magento, the record will also be wiped from Vtiger's Products

- Product **Khaki pant** is deleted



- In Vtiger's **Products**



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.