2. Vtiger Integration User Guides

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

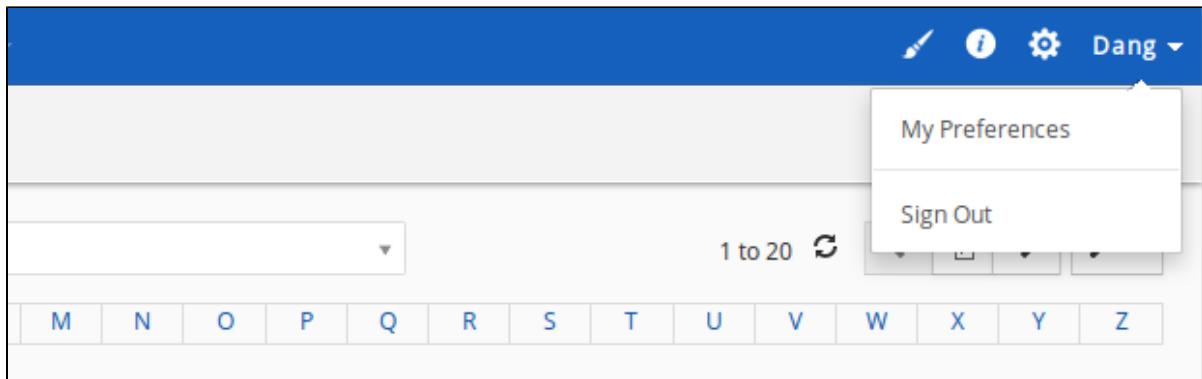Your store should be running Magento Community Edition version 1.8.x or 1.9.x

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

MY DASHBOARD

Thank you for registering with Main Website Store.

Hello, Steven Locke!
From your My Account Dashboard you have the ability to view a snapshot of your recent account activity and update your account information. Select a link below to view or edit information.

ACCOUNT INFORMATION

CONTACT INFORMATION
EDIT

Steven Locke
stevel.921@gmail.com
Change Password

NEWSLETTERS
EDIT

You are currently not subscribed to any newsletter.

- 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

ADDRESS BOOK

ADD NEW ADDRESS

The address has been saved.

DEFAULT ADDRESSES

DEFAULT BILLING ADDRESS

Steven Locke
Brien
Las Vegas, Nevada, 81523
United States
T: 561 6816 165

Change Billing Address

ADDITIONAL ADDRESS ENTRIES

You have no additional address entries in your address book.

- In Vtiger's **Contacts**

| Actions ▾ | ＋ Add Contact | | ▼ All Contacts | ▾ | 1 to 20 ↻ | ‹ | ↪ | › | ⚙ ▾ |

| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z |

	First Name	Last Name	Title	Organization Name	Primary Email	Office Phone	Assigned To
☐	Steven	Locke		--	stevel.921@gmail.com		Robert Hamsworth
☐	Kelly	Potter		--	kelly.912@gmail.com		Robert Hamsworth

- In Vtiger's **Organizations**

| Actions ▾ | ＋ Add Contact | | ▼ All Contacts | ▾ | 1 to 20 ↻ | ‹ | ↪ | › | ⚙ ▾ |

| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z |

	First Name	Last Name	Title	Organization Name	Primary Email	Office Phone	Assigned To
☐	Steven	Locke		--	stevel.921@gmail.com		Robert Hamsworth
☐	Kelly	Potter		--	kelly.912@gmail.com		Robert Hamsworth

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**

	Actions ▾	+ Add Invoice	▼All Invoice	▾	1 to 18 ↻ ‹ ⊕ › 🔧 ▾

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z

	Subject	Sales Order	Status	Total	Assigned To	
☐						Search
☐	100000009	--	Paid	$105.00	Dang Duy	
☐	100000006	--	Paid	$116.00	Dang Duy	

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

✅ **The product has been saved.**

📦 **Manage Products**　　　　　　　　　　　　　　　　　　　　　　　　　　　　⊕ Add Product

Page ◁ 1 ▷ of 1 pages | View 20 ▾ per page | Total 10 records found | 📶 Notify Low Stock RSS　　　　Reset Filter　Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected　　　　　　　　Actions [▾] Submit

	ID	Name	Type	Attrib. Set Name	SKU	Price	Qty	Visibility	Status	Action
Any ▾	From: ▯ To: ▯		▾	Any ▾		From: ▯ To: ▯ In: USD ▾	From: ▯ To: ▯	▾	▾	
☐	13	khaki pant	Simple Product	Default	412	$140.00	10	Catalog, Search	Enabled	Edit
☐	12	strike shirt	Simple Product	Default	strike_shirt	$90.00	100	Catalog, Search	Enabled	Edit
☐	11	tea	Simple Product	Default	123	$123.00	9	Catalog, Search	Enabled	Edit

- In Vtiger's **Products**

	Actions ▾	+ Add Product	▼All Products	▾	1 to 20 ↻ ‹ ⊕ › 🔧 ▾

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z

	Product Name	Part Number	Commission Rate	Qty. In Stock	Qty/Unit	Unit Price	
☐							Search
☐	khaki pant	412	0.000	1	10	$140.00	
☐	strike shirt	strike_shirt	0.000	1	100	$90.00	
☐	Jacket	jacket81	0.000	0	5	$100.00	
☐	tea	123	0.000	1	9	$123.00	

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

Edit Rule 'Autumn Fashion Sales'   ◀ Back | Reset | ⊗ Delete | ✔ Save and Apply | ✔ Save | ✔ Save and Continue Edit

Rule Name *	Autumn Fashion Sales
Description	50% sales on all autumn products

- In Vtiger's **Campaigns**

Actions ▾	✚ Add Campaign		▼ All Campaigns	▾		1 to 20 ↻	◀	⊕	❯	🔧 ▾

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

☐	Campaign Name	Campaign Type	Campaign Status	Expected Revenue	Expected Close Date	Assigned To	
							Search
☐	Autumn Fashion Sales		Active	0.00	29-10-2015	Robert Hamsworth	
☐	sale off 50%		Active	0.00	22-10-2015	Robert Hamsworth	

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

👥 **Manage Customers**   ⊕ Add New Customer

Page ◀ 1 ▶ of 1 pages | View 20 ▾ per page | Total 4 records found   📄 Export to: CSV ▾ Export   Reset Filter | Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected   Actions ▾ Submit

	ID ↓	Name	Email	Group	Telephone	ZIP	Country	State/Province	Customer Since	Action
Any ▾	From: To:			▾			All Countries ▾		From: 📅 To: 📅	
☐	9	Kelly Potter	kelly.912@gmail.com	General	81561 6851 13	84652	United States	Idaho	Dec 10, 2015 8:08:12 AM	Edit
☐	8	Mike Watney	mwatney102@gmail.com	General	8165 68132 651	65128	United States	North Dakota	Dec 10, 2015 8:05:12 AM	Edit
☐	7	John McCane	mccane86@gmail.com	General	984 6846 646	65123	United States	Minnesota	Dec 10, 2015 8:02:29 AM	Edit
☐	6	Mary Lane	mlane1412@hotmail.com	General	61651 6168 16	16816	United States	California	Dec 10, 2015 7:55:59 AM	Edit

- 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.