

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

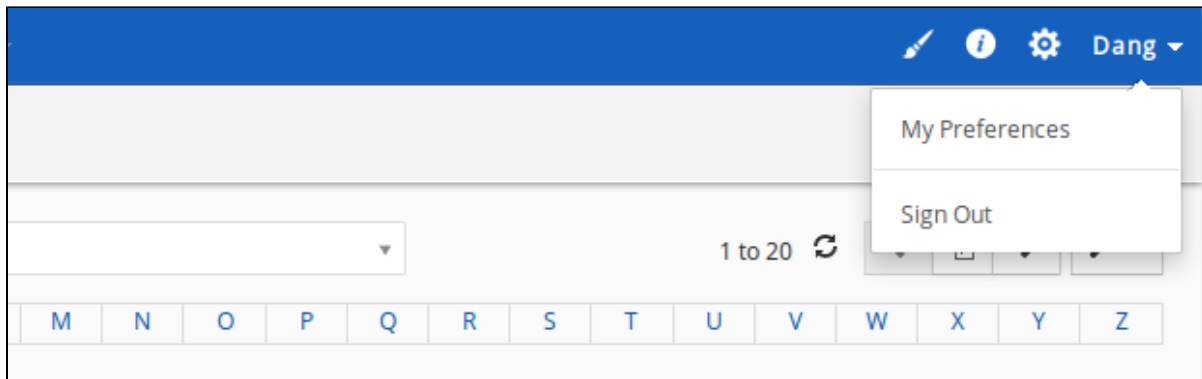
Video Tutorial Playlist

(Go to playlist link to view more: <https://www.youtube.com/playlist?list=PL0gckfH7zlZs60zPwcuv7tUQ0UVZpRxeH>)

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**

▼ User Photograph	
Upload Photograph	
▼ User Advanced Options	
Access Key	KRn5bpZpPf0wRspD
Tag Cloud Display	
Tag Cloud	✓ Shown

Filling in information

Vtiger integration setting
Save Config

Vtiger Integration authenticate		
Username	<input type="text" value="duynd"/>	[WEBSITE]
▲ Vtiger username		
Url	<input type="text" value="http://vtigercrm.magenest.com/webservice.php"/>	[WEBSITE]
▲ Ex: vtigercrm.magenest.com/webservice.php		
Access Key	<input type="text" value="KRn5bpZpPf0wRsp"/>	[WEBSITE]
▲ Please input your access key to run module. To view your access key of your Vtiger account let open your Vtiger CRM page > My Preferences > User Advanced Options		
Operation		
Sync Account	<input type="text" value="Yes"/>	[WEBSITE]
Sync Campaign	<input type="text" value="Yes"/>	[WEBSITE]
Sync Lead	<input type="text" value="Yes"/>	[WEBSITE]
Sync Contact	<input type="text" value="Yes"/>	[WEBSITE]
Sync Order	<input type="text" value="Yes"/>	[WEBSITE]
Sync Product	<input type="text" value="Yes"/>	[WEBSITE]
Sync Subscriber	<input type="text" value="Yes"/>	[WEBSITE]

- **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**.

Grid Header							Add
Page 1 of 1 pages View 20 per page Total 19 records found							Export to: CSV Export Reset Filter Search
Select All Unselect All Select Visible Unselect Visible 0 items selected							Actions Submit
	ID	Vtigerintegration	magento	type	Description	status	Action
Any							
<input type="checkbox"/>	1	firstname	firstname	Leads	First Name		1 Edit
<input type="checkbox"/>	2	lastname	lastname	Leads	Last Name		1 Edit
<input type="checkbox"/>	3	phone	bill_telephone	Leads	Phone		1 Edit
<input type="checkbox"/>	4	email	email	Leads	Email		1 Edit
<input type="checkbox"/>	5	hdnDiscountAmount	discount_amount	Invoice	Discount Amount		1 Edit
<input type="checkbox"/>	6	hdnS_H_Amount	discount_amount	Invoice			1 Edit
<input type="checkbox"/>	7	bill_street	bill_street	Invoice			1 Edit
<input type="checkbox"/>	8	bill_city	bill_city	Invoice			1 Edit
<input type="checkbox"/>	9	campaignname	name	Campaigns			1 Edit
<input type="checkbox"/>	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

Export to: CSV Export

Reset Filter Search

Actions Submit

Description	status	Action

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

Add New Mapping

Rule

Select Table *

--- Select Option ---

Update Fields

Vtiger Field *

Magento field *

Status *

In active

Description

- 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**

<input type="checkbox"/>	First Name	Last Name	Company	Primary Phone	Website	Primary Email
<input type="checkbox"/>						
<input type="checkbox"/>	Steven	Locke				stevel.921@gmail.com
<input type="checkbox"/>	Kelly	Potter				kelly.912@gmail.com
<input type="checkbox"/>	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

NEWSLETTER

email.address1@gmail.com

SUBSCRIBE

- In Vtiger's **Leads**

Actions ▾		+ Add Lead		▼ All Leads ▾												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
<div><div></div><div></div></div>																									
<input type="checkbox"/>	First Name	Last Name	Company	Primary Phone	Website	Primary Email	Assigned To																		
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																		
<input type="checkbox"/>	Guest		N/A			email.address1@gmail.com	Robert Hamsworth																		

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

Actions

+ Add Lead

▼ All Leads

1 to 20

◀

📄

▶

🔧

A

B

C

D

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S

T

U

V

W

X

Y

Z

First Name

Last Name

Company

Primary Phone

Website

Primary Email

Assigned To

Bond

N/A

jaysg12379@gmail.com

Robert Hamsworth

James

Bond

jb19237@gmail.com

Robert Hamsworth

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

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G

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- In Vtiger's **Organizations**

Actions

+ Add Contact

All Contacts

1 to 20

A

B

C

D

E

F

G

H

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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

YOUR ORDER HAS BEEN RECEIVED.

THANK YOU FOR YOUR PURCHASE!

Your order # is: [100000009](#).

You will receive an order confirmation email with details of your order and a link to track its progress.

Click [here to print](#) a copy of your order confirmation.

CONTINUE SHOPPING

- In Vtiger's **Sales Orders**

Actions		+ Add Sales Order		All Sales Order												1 to 8											
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		
<input type="checkbox"/>	Subject	Organization Name				Quote Name				Total				Assigned To													
	<input type="text"/>	<input type="text"/>				<input type="text"/>				<input type="text"/>				<input type="text"/>												<input type="button" value="Search"/>	
<input type="checkbox"/>	100000009	Locke				--				\$105.00				Dang Duy													
<input type="checkbox"/>	100000006	LName				--				\$116.00				Dang Duy													

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

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

The invoice has been created.

Order # 100000009 | Oct 12, 2015 11:28:49 PM

Order # 100000009 (the order confirmation email was sent)

Order Date

Oct 12, 2015 11:28:49 PM

Order Status

Processing

Purchased From

Main Website
Main Website Store
Default Store View

Placed from IP

14.162.167.242

Account Information

Customer Name

[Steven Locke](#)

Email

stevel.921@gmail.com

Customer Group

General

Back

Edit

Reorder

- 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
<input type="checkbox"/>	Subject	Sales Order		Status		Total		Assigned To																	
	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="button" value="Search"/>															
<input type="checkbox"/>	100000009	--		Paid		\$105.00		Dang Duy																	
<input type="checkbox"/>	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		
Select All Unselect All Select Visible Unselect Visible 0 items selected												Actions ▾		
	ID	Name		Type	Attrib. Set Name	SKU	Price	Qty	Visibility	Status	Action			
Any ▾	From: <input type="text"/>	<input type="text"/>		▾	▾	<input type="text"/>	From: <input type="text"/>	From: <input type="text"/>	▾	▾				
	To: <input type="text"/>						To: <input type="text"/>	To: <input type="text"/>						
							In: <input type="text"/>							
<input type="checkbox"/>	13	khaki pant		Simple Product	Default	412	\$140.00	10	Catalog, Search	Enabled	Edit			
<input type="checkbox"/>	12	strike shirt		Simple Product	Default	strike_shirt	\$90.00	100	Catalog, Search	Enabled	Edit			
<input type="checkbox"/>	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

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I

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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

✓ The rule has been saved.

Edit Rule 'Autumn Fashion Sales' [Back](#) [Reset](#) [Delete](#) [Save and Apply](#) [Save](#) [Save and Continue Edit](#)

Rule Name *

Description

- In Vtiger's **Campaigns**

Actions [+ Add Campaign](#) All Campaigns 1 to 20 [Refresh](#) [Print](#) [Export](#) [Filter](#)

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

<input type="checkbox"/>	Campaign Name	Campaign Type	Campaign Status	Expected Revenue	Expected Close Date	Assigned To
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Autumn Fashion Sales		Active	0.00	29-10-2015	Robert Hamsworth
<input type="checkbox"/>	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

✓ The customer has been 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

	ID	Name	Email	Group	Telephone	ZIP	Country	State/Province	Customer Since	Action
Any	From:						All Countries		From:	
	To:								To:	
<input type="checkbox"/>	9	Kelly Potter	kelly912@gmail.com	General	81561 6851 13	84652	United States	Idaho	Dec 10, 2015 8:08:12 AM	Edit
<input type="checkbox"/>	8	Mike Watney	mwatney102@gmail.com	General	8165 68132 651	65128	United States	North Dakota	Dec 10, 2015 8:05:12 AM	Edit
<input type="checkbox"/>	7	John McCane	mccane86@gmail.com	General	984 6846 646	65123	United States	Minnesota	Dec 10, 2015 8:02:29 AM	Edit
<input type="checkbox"/>	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**

Actions

+ Add Lead

All Leads

1 to 20

A

B

C

D

E

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G

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J

K

L

M

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R

S

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V

W






X

Y






Z

<input type="checkbox"/>	First Name	Last Name	Company	Primary Phone	Website	Primary Email	Assigned To
<input type="checkbox"/>							
<input type="checkbox"/>	Kelly	Potter				kelly.912@gmail.com	Robert Hamsworth
<input type="checkbox"/>	Mike	Watney				mwatney102@gmail.com	Robert Hamsworth
<input type="checkbox"/>	John	McCane				mccane86@gmail.com	Robert Hamsworth
<input type="checkbox"/>	Mary	Lane				mlane1412@hotmail.com	Robert Hamsworth

- 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		
<div><div></div><div></div></div>																											
<input type="checkbox"/>	First Name	Last Name		Title		Organization Name				Primary Email				Office Phone				Assigned To									
	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>				<input type="text"/>				<input type="text"/>				<input type="text"/>									
<input type="checkbox"/>	Kelly	Potter				--				kelly.912@gmail.com								Robert Hamsworth									
<input type="checkbox"/>	Mike	Watney				--				mwatney102@gmail.com								Robert Hamsworth									
<input type="checkbox"/>	John	McCane				--				mccane86@gmail.com								Robert Hamsworth									
<input type="checkbox"/>	Mary	Lane				--				mlane1412@hotmail.com								Robert Hamsworth									

- In Vtiger's **Organizations**

Actions ▾		+ Add Organization		▼ All Organizations												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	
<input type="checkbox"/>	Organization Name	Billing City		Website		Primary Phone		Assigned To																		
	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="button" value="Search"/>																
<input type="checkbox"/>	Potter					81561 6851 13		Robert Hamsworth																		
<input type="checkbox"/>	Watney					8165 68132 651		Robert Hamsworth																		
<input type="checkbox"/>	McCane					984 6846 646		Robert Hamsworth																		
<input type="checkbox"/>	Lane					61651 6168 16		Robert Hamsworth																		

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

- Product **Khaki pant** is deleted

✔ The product has been deleted.

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: <input type="text"/> To: <input type="text"/>					From: <input type="text"/> To: <input type="text"/> In: USD	From: <input type="text"/> To: <input type="text"/>				
<input type="checkbox"/>	14	Black	Simple Product	Default	black_shirt	\$69.00	7000	Catalog, Search	Enabled	Edit	
<input type="checkbox"/>	12	strike shirt	Simple Product	Default	strike_shirt	\$90.00	100	Catalog, Search	Enabled	Edit	
<input type="checkbox"/>	11	tea	Simple Product	Default	123	\$123.00	9	Catalog, Search	Enabled	Edit	
<input type="checkbox"/>	10	Jacket	Simple Product	Default	jacket81	\$100.00	4	Catalog, Search	Enabled	Edit	

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
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <div>Search</div>
<input type="checkbox"/>	Black	black_shirt	0.000	1	7000	\$69.00
<input type="checkbox"/>	strike shirt	strike_shirt	0.000	1	100	\$90.00
<input type="checkbox"/>	Jacket	jacket81	0.000	0	5	\$100.00
<input type="checkbox"/>	tea	123	0.000	1	9	\$123.00

- 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.

- 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.